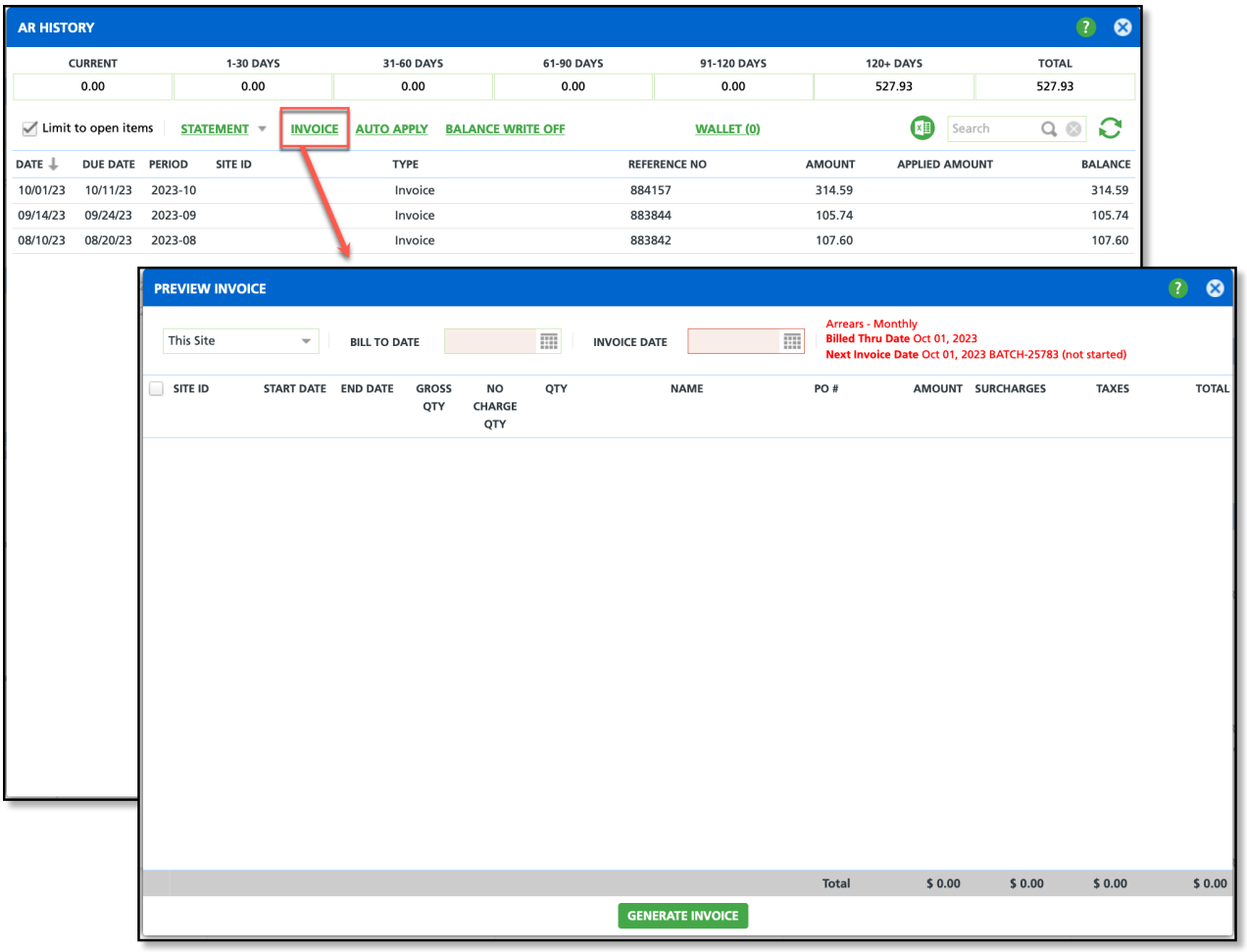
Generate Single Invoice

Last Modified on 09/15/2025 9:46 am PDT

Pathway: *Accounts > Search > Accounts (AR History)*

To generate an invoice for a customer, use the Invoice tool found in the customer's AR History. Invoices can be generated either for an individual site or for all sites associated with the account. To generate an invoice for a single site, access the AR History screen from the specific site for which an invoice is required.



Permissions

The following permissions are required to generate a single invoice in AR History:

Permission ID	Permission Name	
5	View Account	Allows user to access the account to generate a single invoice.
6	View Site	Allows user to access the site to generate a single invoice.
41	View AR History	Allows user to view the AR History screen for the account/site.
262	Generate Single Invoice	Gives users the ability to generate a single invoice. Otherwise, the 'Generate Invoice' button is inactive.

Generate a Single Invoice

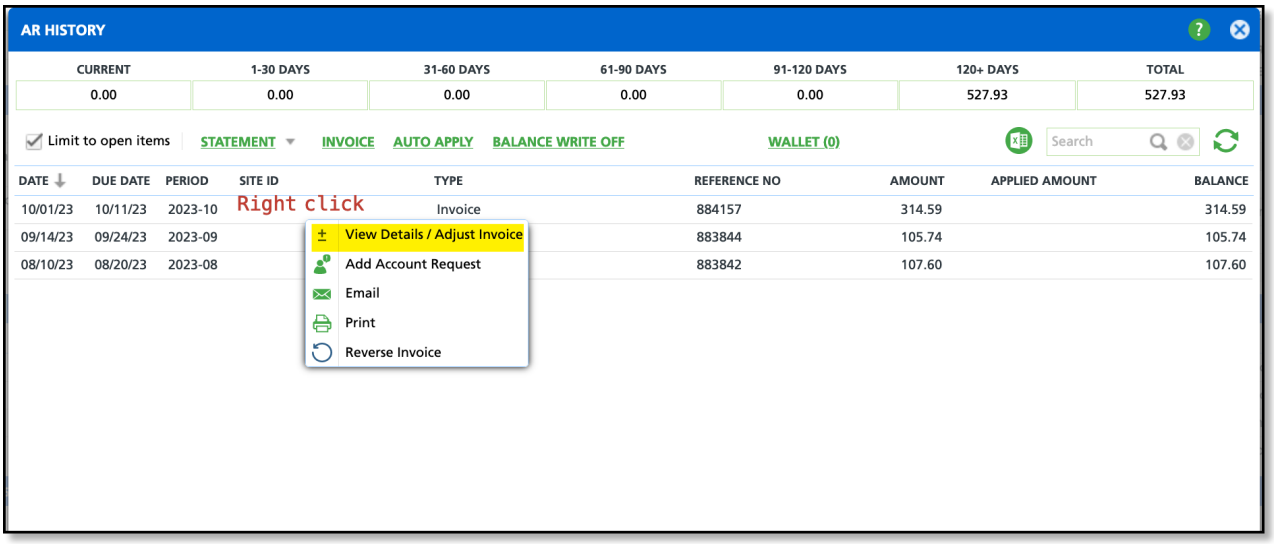
1. Select **'Invoice'** from the header row on the AR History screen to open the **Preview Invoice** popup.
2. Enter a **Bill To Date** to bill the customer for all recurring, posted work orders, and manual charges up to the selected date.

3. Enter an **Invoice Date** to include posted work orders dated on or before the specified date in the invoice.
    - Example 1: Work order is in a Pending or Ready to Post status on 7/31 and the Invoice Date is 8/1. The work order will not be included.
    - Example 2: Work order is in a Posted status on 8/2 and the Invoice Date is 8/1. The work order will not be included.
4. Select '**ThisSite**' if the invoice is for the site currently displayed, or '**All Sites**.'
5. Select the service records to include in the invoice. Recurring services are grouped into a single line item, while each Manual Charge and Work Order dated on or before the Invoice Date is listed as a separate record.
6. Select **Generate Invoice**. A success popup will appear once the invoice has been generated successfully.
    - If the user does not have **permission 262**, this button is inactivated and an authorization message is displayed.

View the Invoice

After the invoice is generated, it will appear on the AR History screen. To view, print, or email the invoice, right-click within the invoice row. The option to reverse the invoice record is also available if the entire invoice needs to be canceled.

Additional information on the *View Details / Adjust Invoice* option can be found in the View Details / Adjust Invoice article.



Related Articles

AR History Overview
View Details / Adjust Invoice
Edit PO Number on Invoice Detail