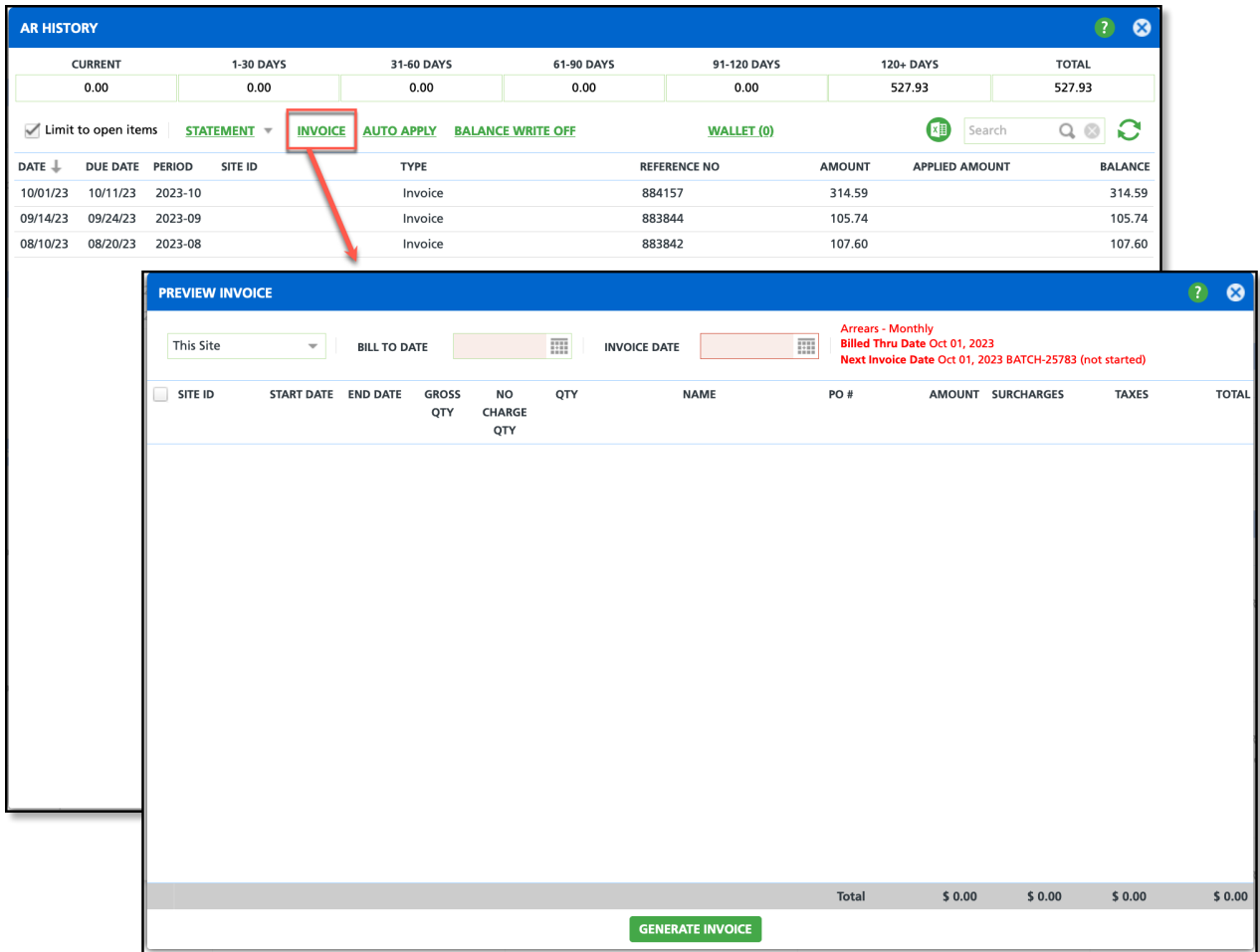


Generate Single Invoice

Last Modified on 05/20/2024 2:55 pm EDT

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 of the AR History screen. The *Preview Invoice* popup window will display.

2. Enter a **Bill To Date**. The invoice will bill the customer for all recurring, posted work orders, and manual charges through the date selected.
3. Enter an **Invoice Date**. *Posted* work orders that are less than or equal to the date indicated will be included 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 if the invoice is for **This Site** (the one currently displayed) or All Sites.
5. Select which service records the invoice should include. Recurring services are grouped together as one line item. A unique record is created for each Manual Charge and Work Order that is before or on the Invoice Date.
6. Select **Generate Invoice**. A Success popup displays when the invoice and successfully generated.
 - If the user does not have permission 262, this button is inactivated and an authorization message is displayed.

View the Invoice

After the invoice has been generated, it will be displayed in the AR History screen. To view, print, or email the invoice, right-click within the invoice row. Additionally, the option to reverse the invoice record is available in case the entire invoice needs to be reversed.



Additional information on the *View Details / Adjust Invoice* option can be found in the [View Details / Adjust Invoice](#) article.

AR HISTORY									
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL			
0.00	0.00	0.00	0.00	0.00	527.93	527.93			
<input checked="" type="checkbox"/> Limit to open items STATEMENT INVOICE AUTO APPLY BALANCE WRITE OFF WALLET (0) Search									
DATE ↓	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE	
10/01/23	10/11/23	2023-10		Invoice	884157	314.59		314.59	
09/14/23	09/24/23	2023-09			883844	105.74		105.74	
08/10/23	08/20/23	2023-08			883842	107.60		107.60	

Right click

- ± View Details / Adjust Invoice
- 👤 Add Account Request
- ✉ Email
- 🖨 Print
- ↺ Reverse Invoice