asgard
Learning Portal

Asgard Desktop
Billing Invoice Report

Purpose & Best Use

What It Does

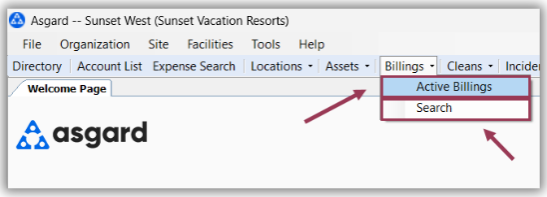
The Billing Invoice Report generates a **consolidated invoice** showing all billable work orders and charges for an owner during a selected billing period.

When to Use It

- **Best for:** Providing an owner with a complete, customer-facing invoice for a billing period.
- **Think of it as:** *"What are we charging the owner?"*
- **Output:** A summarized view of all work orders and billable charges in the selected period.

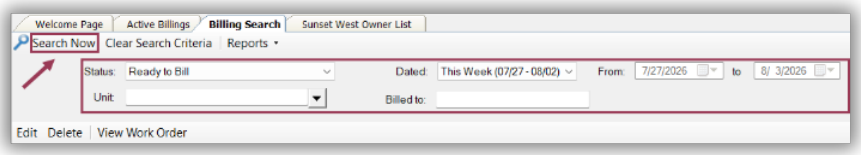
Where to Find It

Step 1: Navigate to **Billings** and open either **Active Billings** or **Billing Search**.



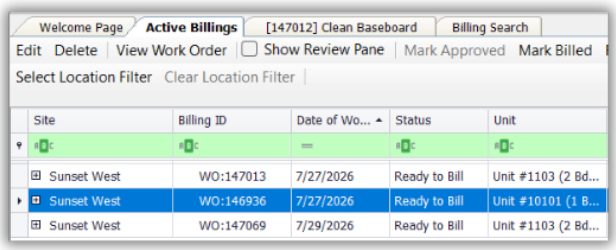
Step 2: If using **Billing Search**, enter your search criteria and select **Search Now**.

If using **Active Billings**, proceed to Step 3.

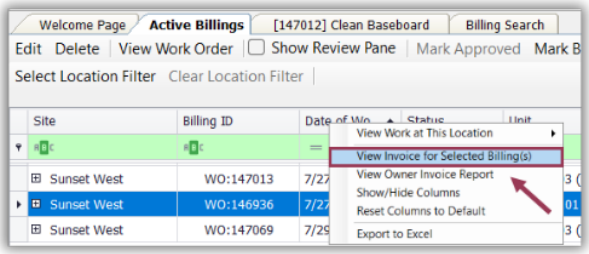


Tip: *Status* must be **Ready to Bill** or **Billed** to generate the report.

Step 3: Highlight the billing line(s) you want to include in the report.

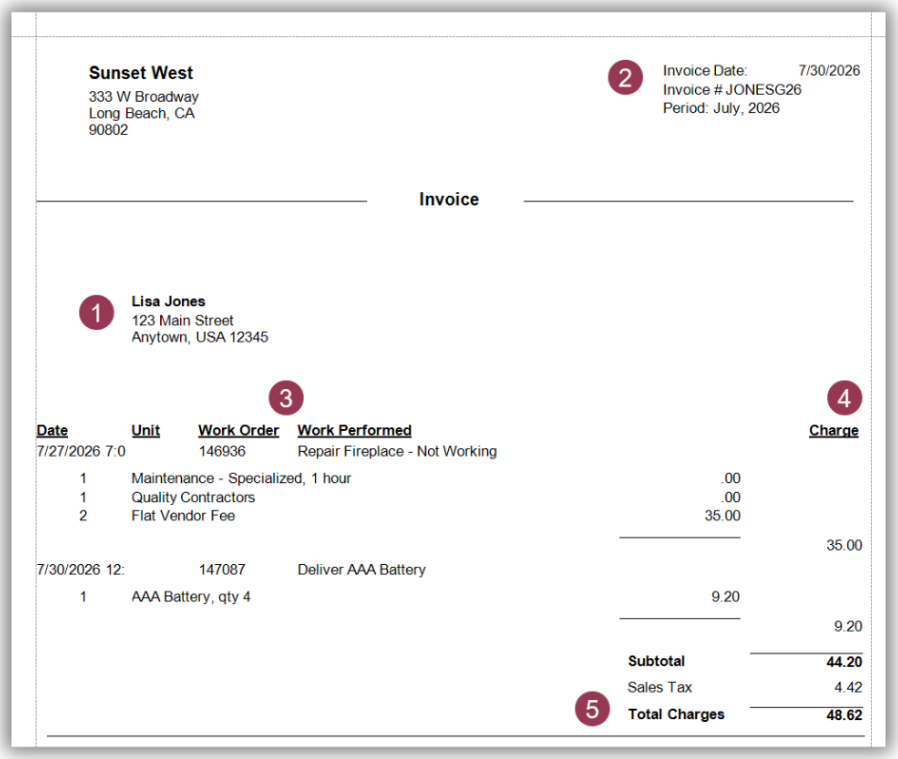


Step 4: Right-click the highlighted billing line(s), then select **View Invoice for Selected Billing(s)**. The report will open automatically on a new screen.



Billing Invoice Report

The Billing Invoice Report provides a summary of all selected billable work orders and charges for an owner during the billing period.



Sunset West
333 W Broadway
Long Beach, CA
90802

2 Invoice Date: 7/30/2026
Invoice # JONESG26
Period: July, 2026

Invoice

1 **Lisa Jones**
123 Main Street
Anytown, USA 12345

Date	Unit	Work Order	Work Performed		3 / 4 Charge
7/27/2026 7:0		146936	Repair Fireplace - Not Working		
1	Maintenance - Specialized, 1 hour			.00	
1	Quality Contractors			.00	
2	Flat Vendor Fee			35.00	
					35.00
7/30/2026 12:		147087	Deliver AAA Battery		
1	AAA Battery, qty 4			9.20	
					9.20
				Subtotal	**44.20**
				Sales Tax	4.42
				5 **Total Charges**	**48.62**

1. **Owner Information** – Identifies the owner associated with the invoice.
2. **Invoice Details** – Displays the invoice date, invoice number, and billing period.
3. **Work Orders & Work Performed** – Lists the work orders included in the invoice and a summary of the work completed.
4. **Individual Charges** – Displays the billable charges associated with the selected work orders.
5. **Total Charges** – Shows the subtotal, applicable taxes, and the total amount due.

Recommended Uses

- Provide an owner with a customer-facing invoice
- Review charges included on an owner's invoice
- Print or save an invoice for your records
- Verify invoice totals before sending them to an owner