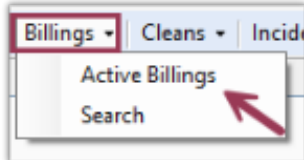
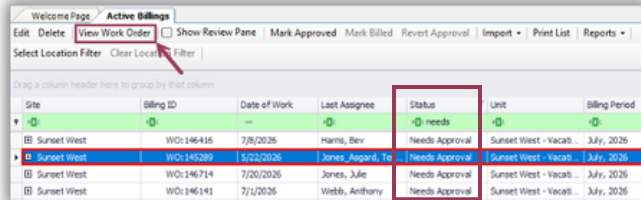


Workflow Overview: Department Manager Review, followed by Final Approval by the Financial Manager.
 Each team may adjust this workflow as needed; the same individual may complete both steps.
 If you need billings permissions, please contact us at support@asgardsoftware.com.

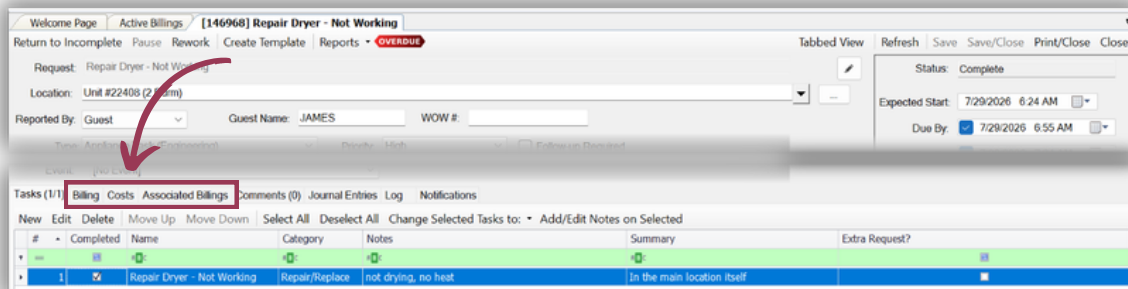
Step 1: In the Billing drop-down, select **Active Billing**.



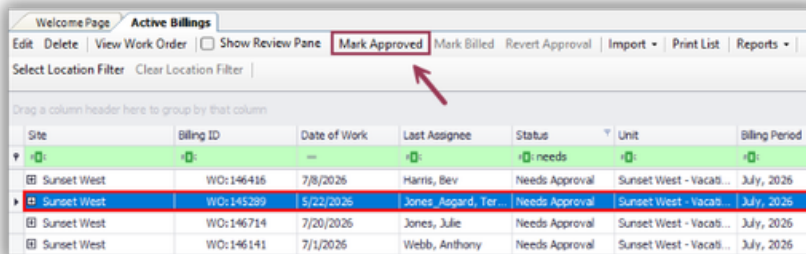
Step 2: In the Status column, filter for **Needs Approval**. Highlight a **Billing**, click **View Work Order** to open, and review Billing tabs.



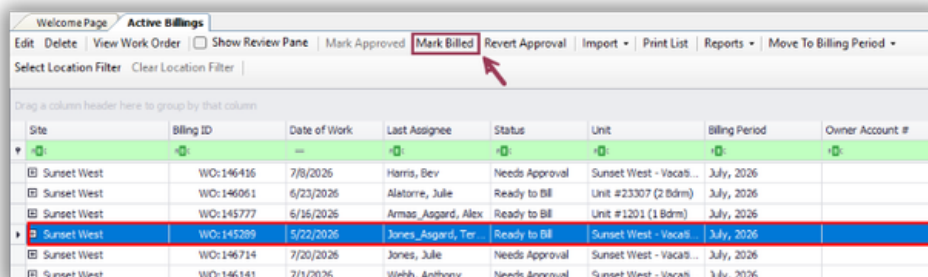
Step 3: Make any necessary updates to labor, parts, or other billing details.



Step 4: Once your review is complete, highlight the billing and click **Mark Approved**. The billing status will update to **Ready to Bill**.

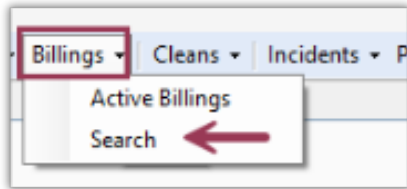


Step 5: Highlight the required billing and click **Mark Billed** for any billings that should be included in the current month's process.

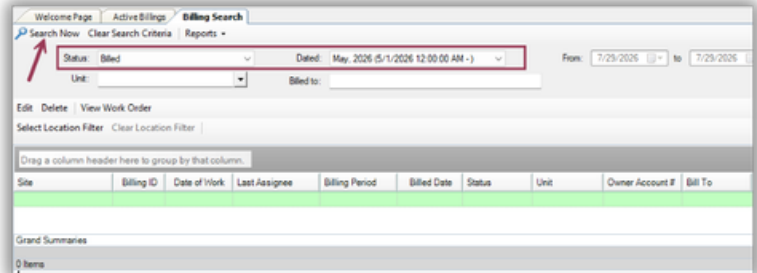


Review the items scheduled to be included in the current month.

Step 1: In the Billing drop-down, select **Search**.

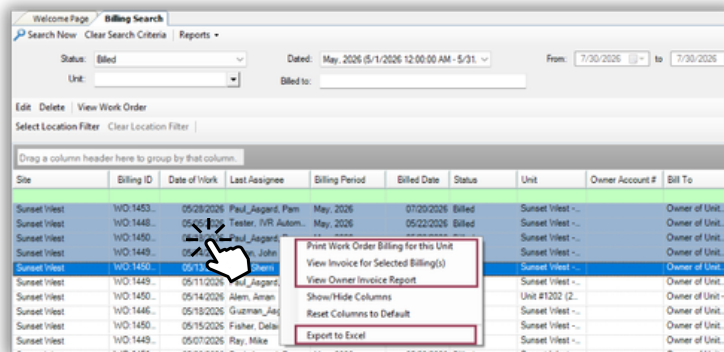


Step 2: Change the **Status** to **Billed** and the **Dated** field to the Current Period. Next, click **Search Now**.

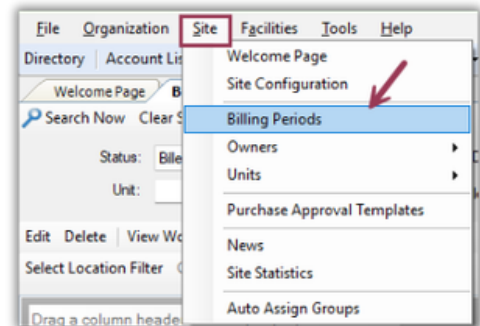


Step 3: The search results can be exported to Excel, generated as invoices, or Printed/Saved as a report by:

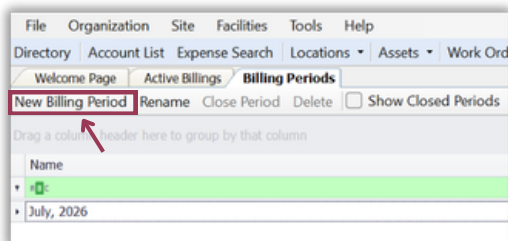
- **Highlight** the line(s) to be included
- **Right-click** on the grid
- Select the **option** that fits your needs



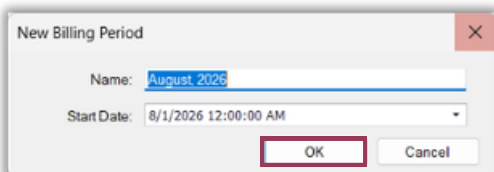
Step 4: In the top menu, click **Site**. Then, click on **Billing Period**.



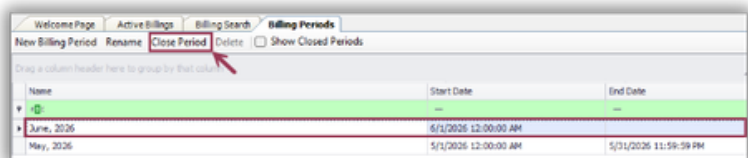
Step 5: Click on **New Billing Period**



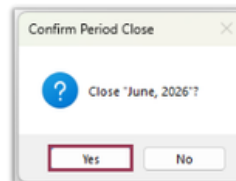
Edit the **Name** and **Start Date**, if needed. Next, click **OK**.



Step 6: Highlight the previous period and click **Close Period**.



Click **Yes** to confirm.



Now all recently completed work orders with billings will be included in the new billing period.

The previous month's billings can be **accessed** via reports on the **Search** screens at any time.