

# Setting up the Earliest / Latest Allowed Billing Date

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Chase allows you to set up the Earliest or Latest Allowed Billing Date where you can specify the allowed date range for creating all Invoices.

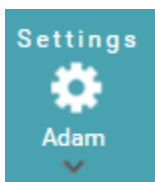
Earliest Allowed Billing Date will prevent billings from being backdated before a specific date. Latest Allowed Billing Date will prevent billings from being future dated after a specific date.

Below are steps to show how to set up the Earliest / Latest Allowed Billing Date.

## Step-by-step guide

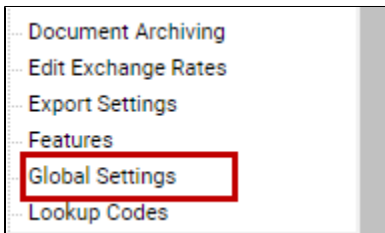
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1. Click the **Settings** button on the Ribbon.



The *Configuration* screen appears.

2. Click the **Global Settings** group to expand it.




The *Global Settings* screen appears.

3. Ensure that the **General Settings** tab is selected.
4. Select a date from the calendar on the **Earliest Allowed Billing Date** field.

# GLOBAL SETTINGS

General | Active Directory Settings | Audit Types | CDB Settings

Earliest Allowed Billing Date: 

Latest Allowed Billing Date: 

Allow Client change on Job With Financial Documents:

Allow Billing Before Job Open Date:

Show 'Tax Free' on the Invoice lines:

Allow inline Editing of Notes:

HTML Notes on Financial Documents:

ByPass JobBag Date Order Validation:

Lock JobCategory if Job contains exported Docs:




S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Today

If you attempt to create an Invoice before the earliest allowed billing date you will not be allowed. The Billed date on the Invoice must fall on or after the Earliest Allowed Billing Date.

Create Invoice

F - Bill the Full / Outstanding Value of the Cost Estimate | Order No. | Date: 14 November 2018 |  Expand All

Item	To be Billed	Billed to Date	Estimated	Act Cost + Mi	Est Cost	Act Cost	%Mkup	Notes
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**Error**

There was an error while creating the document. Please check to see if the document was created successfully.

Message: The Billing Date on all billing documents must fall between the allowed billing dates. Please follow up with your company Chase administrator. The transaction ended in the trigger. The batch has been aborted.

OK

5. Select a date from the calendar on the **Latest Allowed Billing Date** field.

# GLOBAL SETTINGS

General Active Directory Settings Audit Types CDB Settings

Earliest Allowed Billing Date: 15 November 2018

Latest Allowed Billing Date: [Calendar icon]

Allow Client change on Job With Financial Documents:

Allow Billing Before Job Open Date:

Show 'Tax Free' on the Invoice lines:

Allow inline Editing of Notes:

HTML Notes on Financial Documents:

ByPass JobBag Date Order Validation:

Lock JobCategory if Job contains exported Docs:

Default Forecasting Multiplier:

December 2018

S	M	T	W	T	F	S
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today

If you attempt to create an Invoice after the latest allowed billing date you will not be allowed. The Billed date on the Invoice must fall on or before the Latest Allowed Billing Date.

Create Invoice

F - Bill the Full / Outstanding Value of the Cost Estimate Order No Date: 18 December 2018

Item	To be Billed	Billed to Date	Estimated	Act Cost + M	Est Cost	Act Cost	%Mkup	Notes
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Error

There was an error while creating the document. Please check to see if the document was created successfully.  
Message: The Billing Date on all billing documents must fall between the allowed billing dates. Please follow up with your company Chase administrator.  
The transaction ended in the trigger. The batch has been aborted.

OK

6. Click the **Save** button.

# GLOBAL SETTINGS

General Active Directory Settings Audit Types CDB Settings FTP Settings Password Settings Financial Settings

Earliest Allowed Billing Date: 15 November 2018

Latest Allowed Billing Date: 17 December 2018

Allow Client change on Job With Financial Documents: When invoices h

Allow Billing Before Job Open Date:

Show 'Tax Free' on the Invoice lines:

Allow inline Editing of Notes:

Default File Name: (ConfigCompanyNa

Agency uses a Payroll System:

Allow Ad Hoc Approval Work Flow:

Workflow History Visible To: Anyone

Show All Dependant Tasks:

Allow Unfiltered Reports: Allow

## Related articles

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### Content by label

There is no content with the specified labels

