

Changing the status of multiple financial documents

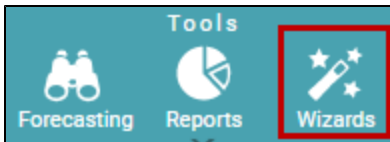
You can use the **Financial Document Status** wizard to change the status of financial documents. For example:

- You can change the status of Approved Cost Estimates to Cancelled for a specific client.
- You can also change the status of documents on a particular job by specifying a Job Number.
- You can change the status on documents issued during a specific time period, for example, change the status from Checked to Cancelled for all POs issued between March and September.

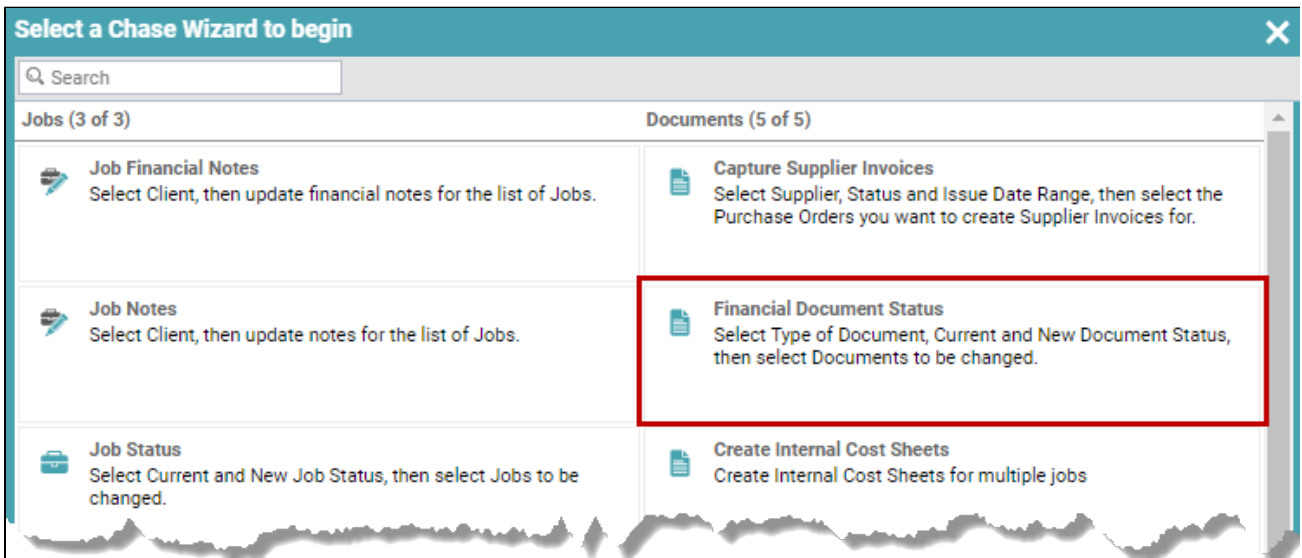
Below are steps to show you how to change the status of multiple financial documents.

Step-by-step guide

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



2. The *Select a Chase Wizard to begin* dialog appears. Click on the **Financial Document Status** section.



The *Bulk Financial Documents Status Change Wizard* dialog appears.

The **Common Task** field contains a list of filters defining status changes for specific documents. Selecting a Common Task automatically populates the **Document Type** and **New Status** fields.

You can also Save a selected filter, which will make it available as a Common Task the next time you open the wizard.

3. Click the **Document Type** field and select the financial document you want to edit.

This is a mandatory field and needs to be completed.

- Select the **Current Status** of the financial documents you want to update.
- Select the **New Status** to which you want to change the financial documents.
- Optionally select a range of billed dates to filter for and click the **Next** button.

Bulk Financial Document Status Change Wizard

Select Current and New Status

Save Filter Delete Filter

Common Task: {All Tasks}

Document Type: Cost Estimate

Current Status: Draft

New Status: Final

Client: {All Clients}

Billed Date Between: and

Only applies where document versions were tracked

Min. Days in Status:

Job No: Search here

Clear Filter < Previous **Next >** Cancel

- In this example, All CEs in the selected Draft status are displayed. Click the checkbox to the left of the documents you want to update.
- Once satisfied with your selection, click the **Next** button to continue.

Bulk Financial Document Status Change Wizard

Select Documents to be changed Status: Open

Change Cost Estimate Status from Draft to Final

Search here Column Ordering

| <input type="checkbox"/> | Doc No | Status | Issue Date | Billed Date | Amount | Tax Amt | Amt + Tax | Margin | Job No | Descriptor | Client | Last Status |
|-------------------------------------|--------|--------|--------------|-------------|-----------|----------|-----------|--------|--------|--------------|------------------|-------------|
| <input type="checkbox"/> | 10 | Draft | 16 Aug 20... | | 50,020.00 | 7,002.80 | 57,022.80 | 0 | 7 | Nail Prom... | Mhofu | 1599 |
| <input checked="" type="checkbox"/> | 125 | Draft | 31 Oct 20... | | 2,500.00 | 400.00 | 2,900.00 | 0 | 171 | Summer ... | Trish Bea... | 695 |
| <input checked="" type="checkbox"/> | 128 | Draft | 06 Nov 20... | | 2,790.00 | 390.60 | 3,180.60 | 0 | 116 | A6 Audi, ... | Audi SA | |
| <input checked="" type="checkbox"/> | 131 | Draft | 06 Nov 20... | | 7,930.00 | 1,110.20 | 9,040.20 | 0 | 179 | 2017 Rate... | American ... | |
| <input checked="" type="checkbox"/> | 139 | Draft | 09 Nov 20... | | 66,798.96 | 9,351.85 | 76,150.81 | 0 | 181 | Penthous... | Adrenna P... 695 | |
| <input checked="" type="checkbox"/> | 140 | Draft | 09 Nov 20... | | 66,798.96 | 9,351.85 | 76,150.81 | 0 | 181 | Penthous... | Adrenna P... 695 | |
| <input type="checkbox"/> | 142 | Draft | 12 Nov 20... | | 26,000.00 | 4,160.00 | 30,160.00 | 0 | 36 | Summer ... | Trish Bea... | |
| <input type="checkbox"/> | 143 | Draft | 12 Nov 20... | | 3,300.00 | 528.00 | 3,828.00 | 0 | 36 | Summer ... | Trish Bea... | |

< Previous **Next >** Cancel

9. Ensure that you have updated the correct documents and click the **Finish** button.

Bulk Financial Document Status Change Wizard

Please Confirm your selections

Change Cost Estimate Status from Draft to Final

| Doc No | Status | Issue Date | Billed Date | Amount | Tax Amt | Amt + Tax | Job No | Description | Client |
|--------|--------|-------------|-------------|-----------|----------|-----------|--------|-----------------|------------------|
| 125 | Draft | 31 Oct 2018 | | 2,500.00 | 400.00 | 2,900.00 | 171 | Summer Bea... | Trish Beauty ... |
| 128 | Draft | 06 Nov 2018 | | 2,790.00 | 390.60 | 3,180.60 | 116 | A6 Audi, N3 ... | Audi SA |
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| 139 | Draft | 09 Nov 2018 | | 66,798.96 | 9,351.85 | 76,150.81 | 181 | Penthouses ,... | Adrenna Pro... |
| 140 | Draft | 09 Nov 2018 | | 66,798.96 | 9,351.85 | 76,150.81 | 181 | Penthouses ,... | Adrenna Pro... |

< Previous **Finish >** Cancel

10. Click the **Close** button.

A green check mark next to a CE means that the process was successful.

A red X mark next to a CE means that the process was unsuccessful. If you hover over the X mark you will be able to view details about the issue.

Bulk Financial Document Status Change Wizard

Confirmation

Processing Complete! Hover over **X** in a row, to view issues.

Download as .xls Download as .csv (Note: All formatting in the exported document will be lost)

| Doc No | Status | Issue Date | Billed Date | Amount | Tax Amt | Amt + Tax | Job No | Description | Client | |
|--------|--------|-------------|-------------|-----------|----------|-----------|--------|------------------|------------------|---|
| 125 | Final | 31 Oct 2018 | | 2,500.00 | 400.00 | 2,900.00 | 171 | Summer Bea... | Trish Beauty ... | ✓ |
| 128 | Final | 06 Nov 2018 | | 2,790.00 | 390.60 | 3,180.60 | 116 | A6 Audi, N3 B... | Audi SA | ✓ |
| 131 | Final | 06 Nov 2018 | | 7,930.00 | 1,110.20 | 9,040.20 | 179 | 2017 Rates, 2... | American Ba... | ✓ |
| 139 | Final | 09 Nov 2018 | | 66,798.96 | 9,351.85 | 76,150.81 | 181 | Penthouses , ... | Adrenna Pro... | ✓ |
| 140 | Final | 09 Nov 2018 | | 66,798.96 | 9,351.85 | 76,150.81 | 181 | Penthouses , ... | Adrenna Pro... | ✓ |

Restart <P> **Close <N>**

Ensure all selected financial document statuses have been updated accordingly.

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