

Initiate an Automated or Manual Workflow

Workflows can be initiated manually on documents or they can be automatically initiated based on configuration by the Chase Administrator.

Below are steps to show you how to:

- automatically trigger a configured workflow
- manually initiate a workflow

Step-by-step guide

Automatically trigger a configured workflow

1. Navigate to the document which you want to trigger a workflow from.

In this example, **Brief 60** was opened.

2. Click the **Status** drop down and select the status that will trigger a workflow.

For this example, **Final** was selected.

The screenshot shows the 'BRIEF 60' document interface. The status dropdown menu is open, and 'Final' is selected. The interface includes a toolbar with icons for chat, share, save, refresh, print, email, and close. The document details are as follows:

Go To:	Job : 249	Date:	28 June 2019
Client:	Trish Beauty Spa - Heidelberg	Status:	[Dropdown Menu]
Campaign:		Quantity:	Final
Contact:	Gavin Mckrow	Size:	
AE:	Adam	Colour:	RGBY
Product:	Nail Promotion	Language:	

The document status will change from Draft to Awaiting Approval. Once the workflow is Approved the status will be updated to the target status, which in this case is **Final**.

The screenshot shows the 'BRIEF 60' document interface. The status dropdown menu is open, and 'Awaiting Approval' is selected. The interface includes a toolbar with icons for chat, share, save, refresh, print, email, and close. The document details are as follows:

Go To:	Job : 249	Date:	28 June 2019
Client:	Trish Beauty Spa - Heidelberg	Status:	Awaiting Approval
Campaign:		Quantity:	1000
Contact:	Gavin Mckrow	Size:	
AE:	Adam	Colour:	RGBY

The workflow recipient will receive an email notification and a to-do item under the To Do tab of the Home page. For steps on how to approve/decline items in a workflow, please follow this topic: [Approve/Decline a document workflow request](#)

To Do	Workflows Created	Completed	
Client Name	Job No.	From User	Create
⊕ {Job 249} Brief 60			
⊕ {Job 249} Amendment 38			
⊕ {Job 242} Discipline Override Request Credit Note 16			

If you want to cancel this workflow please follow this help topic: [Cancelling a workflow](#)

Manually initiate a workflow

1. Navigate to the document which you want to initiate a workflow from.

In this example, **Amendment 38** was opened.

2. Click the **Workflow Action** drop down and select **Request Approval**.

The screenshot shows the 'AMENDMENT 38' document interface. The 'Workflow Action' dropdown menu is open, and 'Request Approval' is highlighted with a red box. The document details include: Go To: Job : 249, Brief : 60; Client: Trish Beauty Spa - Heidelberg; Campaign: ; Contact: Gavin Mckrow; AE: Adam; Product: Nail Promotion. The right sidebar shows fields for Date, Status, Quantity, Size, Colour, and Language.

The *Request Approval* dialog appears.

3. Click the **Approvers** drop down and select users that will be allowed to approve/decline your request.

For this example, **Francine** was selected.

Request Approval [X]

Applies To: Amendment
Doc No: 38
Creation Date: 28 June 2019 11:10:53

From: Adam (Insika Production)

Actioners:

Approvers: [Empty dropdown menu]

Acknowledge: Adam

Notify: Berry McGraw
Bother L (Juri Beauty Parlour)

Notes: Carol Fourie
Francine
Gavin Mckrow (Trish Beauty Spa - Heidelberg)
Inactive Team

You can optionally select users that need to acknowledge the workflow or be notified about the workflow.

4. In the **Notes** field enter a comment/message for the approver.

Request Approval [X]

Applies To: Amendment
Doc No: 38
Creation Date: 28 June 2019 11:10:53

From: Adam (Insika Production)

Actioners:

Approvers: Francine [X] [Dropdown arrow]

Acknowledge: [Empty dropdown menu]

Notify: [Empty dropdown menu]

Notes: [Empty text area with a green circular refresh icon in the bottom right corner]

5. Click the **Request Approval** button.

Request Approval
✕

Applies To: Amendment

Doc No: 38

Creation Date: 28 June 2019 11:10:53

From: Adam (Insika Production)

Actioners:

Approvers: ✕ ▾

Acknowledge: ▾

Notify: ▾

Notes:

Please review and approve. |

↻

Request Approval
Close

The document status will change from Draft to Awaiting Approval.

A M E N D M E N T

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Go To:

Client: Trish Beauty Spa - Heidelberg

Campaign:

Contact: Gavin Mckrow

AE: Adam

Date: 28 June 2019

Status: ▾

Quantity:

Size:

Colour:

The workflow recipient will receive an email notification and a to-do item under the To Do tab of the Home page. For steps on how to approve/decline items in a workflow, please follow this topic: [Approve/Decline a document workflow request](#)

To Do	Workflows Created	Completed
Client Name	Job No.	From User
<input type="checkbox"/> (Job 249) Amendment 38	←	
<input type="checkbox"/> (Job 242) Discipline Override Request Credit Note 16		

If you want to cancel this workflow please follow this help topic: [Cancelling a workflow](#)

