

# Setting up a Job Reverts Workflow

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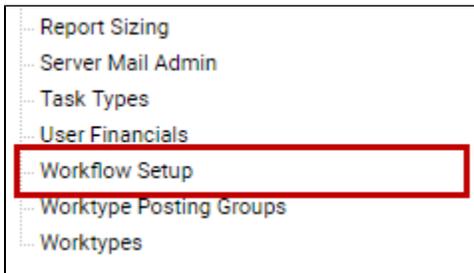
Reverts are used to categorise Amendments that are created in Chase as Internal or External Reverts. Internal Reverts are not chargeable to clients as they are initiated within the agency. External Reverts are amendments from the client and are typically chargeable after a certain number of Amendments. The Job Amendments/Reverts Workflow is used to track Reverts on a Job by counting the number of Job Amendment documents in Chase.

Below are steps to show you how to set up a Job Reverts Workflow.

## Step-by-step guide

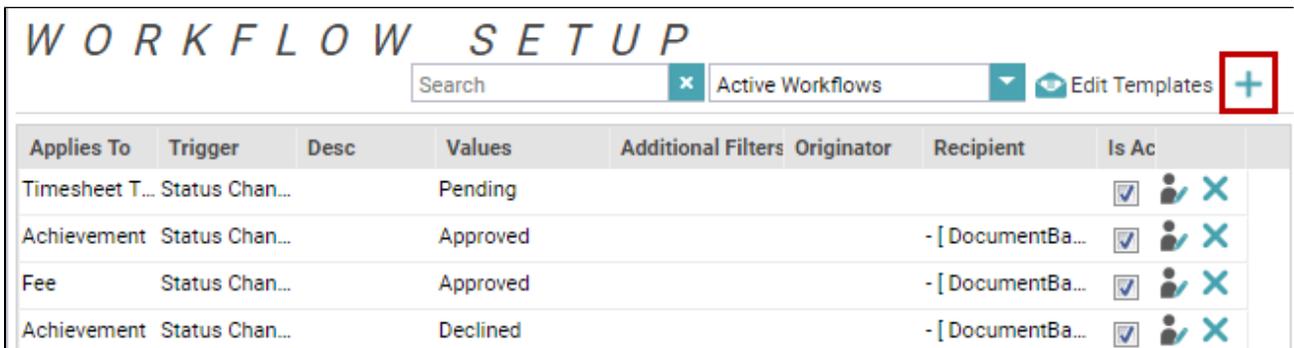
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1. Navigate to **Settings** and click the **Workflow Setup** item.



The *Workflow Setup* screen appears.

2. Click the + (Add line) button on the Toolbar.



The *Set up new / edit existing workflow* dialog appears.

3. Click the drop down arrow on the **Applies to** field, and select **Job Reverts**.

**Set up new / edit existing workflow**

Applies to:

Trigger:

- Reminder for Job Budget Achievement
- Reminder for Job Budget Fee
- InHouse PO
- Request For Quote
- Quote
- Expense
- Sub Tasks
- Sub Tasks Notifications
- Brief Version History
- Job Margin Tracking
- Task Hours
- Job Reverts
- CE Margin Percentage

Workflow Setup Description:

Only Initiate Workflow when the following filters apply:

Originator:

Originator Type:

Escalation Settings:

Escalate to Manager:

Escalate to other:

4. Click the drop down arrow on the **Trigger** field, and select a condition that will trigger this workflow.

In this example, **Total Amendments (Reverts) created more than {Value} per Job** was selected.

**Set up new / edit existing workflow**

Applies to:

Trigger:

Workflow Setup Description:

Only Initiate Workflow when the following filters apply:

Originator:

Originator Type:

5. In the **When Value Greater Than** enter the number of reverts that will trigger the workflow.

For this example, **2** was entered.

**Set up new / edit existing workflow** ✕

Applies to: Job Reverts

Trigger: Total Amendments(Reverts) created more than {Value} per Job

When Value Greater Than:

Action Type:

Workflow Setup Description:

**Only Initiate Workflow when the following filters apply:**

6. Click the **Action Type** drop down and select the type of workflow this is.

**Notification Only** was selected.

Please note that is the only valid choice for this workflow.

**Set up new / edit existing workflow** ✕

Applies to: Job Reverts

Trigger: Total Amendments(Reverts) created more than {Value} per Job

When Value Greater Than: 2

Action Type:

Workflow Setup Description:

**Only Initiate Workflow when the following filters apply:**

Originator: {All}

7. Click the **Additional Filters** tab.

**Set up new / edit existing workflow** ✕

Applies to:

Trigger:

When Value Greater Than:

Action Type:

Workflow Setup Description:

**Only Initiate Workflow when the following filters apply:**

Originator:

Originator Type:

8. Click the + (Add New) button.

**Set up new / edit existing workflow** ✕

Applies to:

Trigger:

When Value Greater Than:

Action Type:

+

Field Name	Comparison	Value

9. Click the **Field Name** drop down and select a field to which the condition will apply.

The following options are governed by the **Revert Type** field on Amendments.

**Internal Reverts** - these are changes made within the agency.

**External Reverts** - these are changes requested by the Client.

**Unspecified Reverts** - this will check for Amendments where the Revert Type field was left blank.

**Other Reverts** - any custom revert types that were created by the Chase Administrator. These are created from Lookup Codes.

For this example, **External Reverts** was selected.

The screenshot shows the 'Additional Filters' tab in a software interface. At the top, there are four tabs: 'Setup', 'Additional Filters' (highlighted in teal), 'Custom SQL Filter', and 'Participant Seq. Groups'. Below the tabs is a table with three columns: 'Field Name', 'Comparison', and 'Value'. The 'Field Name' column has a dropdown menu open, showing a list of options: 'Job Category', 'Job Client', 'Product', 'Campaign', 'Internal Reverts', 'External Reverts' (highlighted with a red box), 'Unspecified Reverts', and 'Other Reverts'. The 'Comparison' and 'Value' columns are currently empty.

10. In the **Comparison** field select a condition that will be used to compare the item (External Reverts) selected in the **Field Name**.  
In this example, **Greater Than** was selected.

The screenshot shows the 'Additional Filters' tab. The 'Field Name' column now contains 'External Reverts'. The 'Comparison' column has a dropdown menu open, showing a list of conditions: 'is equal to', 'is not equal to', 'Between', 'Not between', 'Greater Than' (highlighted with a red box), and 'Less Than'. The 'Value' column is still empty.

11. Enter a value against which the Field Name will be evaluated in the **Value** field.  
For this example, **2** was entered.

The screenshot shows the 'Additional Filters' tab. The 'Field Name' column contains 'External Reverts' and the 'Comparison' column contains 'Greater Than'. The 'Value' column now has a text input field containing the number '2', which is highlighted with a red box.

12. Click the **Participants** tab to select the Users who need to be notified in the Job Reverts workflow.

Global Filters			Custom SQL Filter	Participant Seq. Groups	Participants
					+
Field Name	Comparison	Value			
External Reverts	Greater Than	2			X

13. Click the + (Add New) button.

Global Filters			Custom SQL Filter	Participant Seq. Groups	Participants
					+
Seq. group	Respondent	Action	Required		

A new line is added.

14. Click the drop down arrow on the **Respondent** field, and select the relevant User.

By default, the **Action** field displays **Notify** as the action to be taken and no other options can be applied for this type of workflow

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

Seq. group	Respondent	Action	Required
1		Notify	<input type="checkbox"/>
	Bother L		
	Carol Fourie		
	Francine		
	Gavin Mckrow		
	Inactive Team		
	Luke Harari		
	Mark Jackson		
	Martin Brooks		

15. Click the **Create** button.

### Set up new / edit existing workflow

Applies to: Job Reverts

Trigger: Total Amendments(Reverts) created more than {Value} per Job

When Value Greater Than: 2

Action Type: Notification Only

Seq. group	Respondent	Action	Required
1	Francine	Notify	<input type="checkbox"/>

Send Emails  Active

Create
Cancel

The Job Revert Workflow appears on the *Workflow Setup* screen, and it will be kicked off once more than 2 Client Reverts are created on a Job.

Due to the type of workflow check this is, you might only receive the notification the following day.