

User Guide

Table of Contents

Chase Basics

- Chase Basics Videos
- Logging into Chase
- Setting the login to remember your password
- Changing your password
- Resetting your password
- Menu Buttons and Toolbar
- Searching in Chase
- Sending an Email
- Printing from Chase
- Creating Templates in Chase
- Defining User Options
 - Adding an Email Signature
- Terminology

Chase Videos

Quick Start Guides

- Quick Start - Client Service
- Quick Start - Production
- Quick Start - Finance
- Quick Start - Traffic
- Quick Start - Timesheets
- Quick Start - Administrators

Jobs and Non-Financial Documents

- Jobs and Non-Financial Documents Videos
- Job Bag
 - Adding a Job Bag
 - Adding, editing and archiving Job Bag notes
 - Updating multiple job notes in one place
 - Adding a client contact from the Job Bag
 - Adding a new campaign from the Job Bag
 - Adding milestone dates to a Job Bag
 - Changing the Client on a Job Bag
 - Copy the Job details form to a Job Bag
 - Linking a parent and child Job Bag
 - Creating Cost Estimate line items from Tasks
 - Printing a Campaign Recon Report from the Job Bag
 - Creating Templates from the Job Bag
- Brief
 - Adding a Brief
 - Adding an image to the Brief content area
 - Adding additional fields to the Brief
 - Adding and Applying a Brief template
 - Copying a Brief from MS Word into Chase
 - Copying a Brief from one job bag to another
 - Initiate an Automated or Manual Workflow
 - Approve/Decline a Document Workflow Request
- Amendment
 - Adding an Amendment
 - Changing specs on an Amendment
 - Using Require Date Acknowledgment on Amendment
 - Adding and Applying an Amendment Template
 - Adding an Amendment Revert Type
- External Documents
 - Adding an external document
 - Viewing and Editing External Documents
- Billing Instruction

- Adding a Billing Instruction
- Frequently Asked Questions - Jobs and Non-Financial Documents

Production/Financial

- Production/Financial Videos
- Clients
 - Adding a new Client
 - Adding Client Products
 - Adding a Campaign
 - Adding a Client Contact
 - Adding a Division
- Suppliers
 - Adding a Supplier
 - Adding a Supplier Contact
 - Creating an employee as a Supplier
 - Adding a Contractor
- Cost Estimates
 - Adding a Cost Estimate
 - Budget CE
 - Editing, formatting and deleting a CE
 - Adding and Applying a CE template
 - Calculating the Markup % when you have the cost and total amount
 - Changing the Client on the CE
 - Copying CEs to a Job Bag
 - Enabling and Using a Mock CE
 - Adding a standard admin fee per CE
 - Setting up billing reminders on CEs
 - Cost Forecast per CE line
 - Exchange Rates
 - Printing CE reports
 - Adding menu based Work Types
 - Using the Work Type Funds Transfer feature
 - Take a snapshot of the CE
 - Part Billing a CE with Units
- Purchase Orders
 - Adding a PO
 - Inserting the correct delivery address on the PO
 - Moving a PO between CEs on the same job
 - Ordering above the CE budget
 - Part ordering or ordering per line
 - Splitting a PO between suppliers
- Request For Quote
 - Add a Request for Quote
 - Capture and accept a supplier quotes
- Client Invoices
 - Adding a Tax Invoice
 - Billing for time from the Job Bag
 - Recurring Invoice/CE
- Supplier Invoices
 - Capturing a Supplier Invoice
- Client Credit Notes
 - Adding a Client Credit Note
- Supplier Credit Notes
 - Adding a Supplier Credit Note
- Exports
 - Previewing and exporting documents
 - Viewing archived exports
- Expense Claims
 - Adding an Expense Claim
 - Approving or Declining an Expense Claim
 - Capturing a Supplier Invoice from an Expense Claim
- Bulk Actions
 - Move Costs
 - Wizards
- Inter-Company
 - Enabling and configuring Inter-Company
 - Inter-Company Job Bag initiated process
 - Request for Quote initiated process
- WIP
- Margin Declaration
- Frequently Asked Questions - Production/Financial

CRM/Sales

- Add and Updating an Opportunity
 - How to set a reminder on an Opportunity
 - How to add and archive notes added to an opportunity

Tasks and TimeSheets

- TimeSheets Videos
- Capturing time
 - Copying timesheet entries
 - Capture Time from the Job Bag
 - Capturing Time in Week or List view
 - Capturing time using Auto-Fill
 - Capturing time for someone else
 - Logging Time on a Sub Task
 - Time Tracker
- My Tasks
 - Viewing Tasks assigned to you
 - Viewing a Brief or Amendment linked to a task
 - Choosing your preferred My Task calendar view
 - Marking a task as complete from My Tasks
- TimeSheet Approvals
 - Submitting a timesheet for approval
 - Cancelling time already approved
 - Resubmitting declined time
- TimeSheet Reports
 - Viewing Incomplete Timesheets
 - Viewing the Brief History report
- Frequently Asked Questions - Tasks and TimeSheets

Planning

- Planning on the Job Bag
 - Assigning and Reassigning Tasks on a Job Bag
 - Creating parent and child tasks on the Job Bag
 - Linking dependencies to a Task
 - Adding, editing and deleting a Booking on the Job Bag
 - Creating tasks from a CE
 - Editing and filtering tasks from the All Tasks screen
 - Approving and Declining Timesheets
 - Using Sub tasks on a Job Bag
 - Tracking changes on the Job Bag
 - Linking Briefs and Amendments to tasks
- Planning on the Resource Planner
 - Adding new Tasks on the Resource Planner
 - Editing Tasks and Bookings from the Resource Planner View
 - Prioritising Tasks on the Resource Planner
 - Clearing hours on a single day in a multi-day booking
 - Moving an entire Job Bag's timeline
 - View historical tasks
- Planning in Outlook
 - Adding Bookings via Outlook
 - Editing, Declining and Cancelling a Booking via Outlook
 - Configuring Outlook

Settings

- Company Configuration
 - Master Files
 - Adding, Editing and Deleting Business Units
 - Adding, Editing and Deleting Bulletins
 - Company Details
 - Setting up a Timesheet lockout
 - Setting up Document Number Sequence on Jobs
 - Portal Users
 - Templates
 - Setting up Terms and Conditions
 - Translations
- Access Rights
 - Setting up access rights for Buttons
 - Logging Issues from Chase to Jira
 - Restricting access to individual reports

- Setting up access rights to Forms
- Traffic
 - Setting up Divisions
- Groups Configuration
 - Adding and deleting a Group
 - Linking items to a Group
 - Linking Work types to a Group
 - Security Groups
- Job Categories
 - Setting up Job Categories
- Resources
 - Adding a new User
 - User Rights and Chase Licenses
 - Assigning rights to a User
 - Managing User Licenses
 - Changing the License Type of a user
 - Setting up Users for Calendar integration
 - Timesheet Reminder
- Brief Document Type
 - Associating a Brief Document Type to a Job Category
- Collaboration
 - Setting up the Notification Feed
- Disciplines
 - Setting up and Using Disciplines
 - Approving or Declining an Override
 - Disciplines and Overrides Business Rules
 - Discipline Examples
- Document Archiving
 - Setting up Document Archiving
- Edit Exchange Rates
 - Changing the exchange rate for a specific currency
 - Adding new Exchange Rates
- Export Settings
 - Configuring Export settings
 - Resetting an Export
 - Changing the Accounting Period
- Features
 - ProofHQ setup
 - Resource Planner - Configuring a PA mailbox in Chase
 - Setting up the Inter-Division Transfer functionality
- Global Settings
 - Defining Timesheet Settings
 - Enabling text formatting
 - Setting up a Timesheet Cutoff date
 - Setting up a Fee Type
 - Setting up a Timesheet capturer
 - Setting up specific Work type rates for different Groups
 - Setting up holidays for Timesheets
 - Setting up mandatory supplier quotes for RFQ
 - Setting up the default Booking/Task option
 - Setting up the Earliest / Latest Allowed Billing Date
- Lookup Codes
 - Adding and editing payment terms
 - Setting up Departments
 - Custom Job Statuses
- Note Templates
 - Setting up Note Templates
- Notification Settings
 - Setting up Notification Settings
- Report Links
 - Linking Reports
- Report Sizing
 - Defining Report margins
- Server Mail Admin
- Task Types
 - Adding new Task types
 - Setting up a Sub task
 - Automatically Create Linked Task Type for New Work Types
 - Grouping and Accessing Task types by Department
 - Link Task Types to Work Types
- User Financials
 - Setting up User Financials
- Workflow Setup
 - Setting up an Expense Claim Workflow
 - Setting up a Job Reverts Workflow

- Managing Workflows
- Production Workflows
- Workflow dialog explained
- Setting up a Brief and an Amendment Workflow
- Setting up a Multi list Workflow
- Using Business Unit Distribution Lists in Workflows
- Work types
 - Adding new Work types
 - Adding a menu based Work type
 - Assigning Sales and Purchase GL accounts to a Work type
 - Adding an Admin fee Work type
 - Adding and Using an Offset Work type
 - Adding Material line items
 - Adding a Sub Heading Work type
 - Adding a Sub Total Work type

Reports

- Reports Basics
 - Navigate and Search for Reports
 - Print and Email a Report
 - Setup, edit and remove a favorite report
 - Report filters
- Key Reports
 - Billings List report
 - Payment List report
 - Job Status Report
 - Job List report
 - Profitability by Client report
 - Work In Progress(WIP) report
 - Task List by User report
 - Time by User report
 - Purchase Order List by Supplier report
 - Cost Estimate - List by Client report
 - Job Margin List by Client report
 - Cost Variance Statement
- Frequently Asked Questions - Reports

Job Recon and Closure

- How to Close a Job
- How to make sense of the Job Recon
- How to print a Job Recon Statement from the Job Bag
- Job Recon Statement based on Menu Based tasks

Application Links

- Linking to a Website
- Linking to an existing Jira Ticket
- Linking to Microsoft Teams
- Setting up Basecamp for Application Linking
 - Linking to Basecamp
- Deleting Links

Chase Live Help

Chase Software Support - Customer Portal

Download TeamViewer for Windows

Testing your connectivity to your Hosted Chase

Troubleshooting in Chase

- Basic Troubleshooting
- Advanced Troubleshooting