

Wizards

Wizards allow you to update multiple documents across multiple Job Bags.

There are a number of Wizards available from which you can perform many functions, like change the status of Jobs or edit all job notes for a specific client.

The following wizards are available in Chase:

Job Financial Note

This wizard allows you to update financial notes in bulk. However, financial notes do not have archiving functionality so you would have to add on to current notes if you wish to have a history of all financial notes made against that document.

Job Notes

This wizard allows you to edit or update the notes on a Job Bag. You can edit all notes on Jobs for a specific Client, Jobs opened by a specific traffic person, or all Jobs in a particular status, or filter to the correct Job by Client, status or traffic user.

Job Status

This wizard allows you to change the Job status in batches. You can filter the Jobs you want to affect their current status and/or the traffic user within the agency. For instance, you may want to change all Jobs with the status Finished to Closed. Or you may only want to change the status of Jobs done by Jane Doe with the status On Hold to Awaiting Closure. Change Job Status lets you do this in a single process instead of one-by-one.

Capture Supplier Invoices

With this wizard, Chase allows you to create a Supplier Invoice from a Purchase Order. You can select the Purchase Orders that you want to raise Supplier Invoices against, for a specific Supplier or Purchase Orders with a certain status. The wizard allows you to capture the invoice costs even when there is more than one line item on the Purchase Order. You can also split costs and specify the amounts you want to capture.

Financial Document Status

This wizard effects changes to financial documents, i.e. Cost Estimates, Purchase Orders, Invoices and Credit Notes. For instance, you may need to change all the Cost Sheet statuses for a specific Client from Approved to Cancelled. You can specify a Job number if your Client has many Jobs but you only want to affect one Job. You also have the option of effecting change on documents issued during a specific time period. For example, you can change the status of all Purchase Orders issued between March and September from Checked to Cancelled.

Create Internal Cost Sheets

This is a Cost Sheet you raise for internal costs on a Job Bag. You do not send it to your Client but rather it is for your agency's records. The Internal Cost Sheet will only have internal line items that you can task directly from. The wizard allows you to create Internal Cost Sheets for multiple Jobs.

Capture Payments

This wizard allows you to set the document status to Paid as well as specify a payment date and amount. This will save you the time of having to mark individual invoices and credit notes document by document.

Activity Monitor

This wizard is used to view how the system is being used by employees.

Reassign Reminders

This wizard allows you to reassign active reminders to other users. These reminders are created on financial documents to remind users of what needs to be done, or to remind users of the deadline that needs to be submitted or completed.

Cost Adjustment Wizard

The Cost Adjustment Wizard is used to make an estimate billed cost adjustment on a job bag. This is typically used to make a direct adjustment to the Work In Progress (WIP) and effective margin on a job bag, or if a cost has been captured incorrectly on an invoice on a document.

Contents

- Capturing multiple Supplier Invoices
- Changing the Job Status in batches
- Changing the status of multiple financial documents
- Declaring margin
- Editing financial notes for multiple jobs
- Updating multiple notes on a Job Bag

For example, if you billed a line item as an internal when it should have been external, you can generate a Cost Adjustment Wizard to provide for the billed cost (and ultimately affect the WIP of the job bag) instead of regenerating the invoice.

It is important to note that:
Positive value = Increase Cost
Negative value = Decrease Cost

Job Margin Declaration

This wizard is only available when Pastel Evolution or Navision is used as the accounting package. With this wizard, you can declare margin across multiple open Jobs. You can declare margin with the wizard or from the Job Bag itself. You may have Jobs that run over long periods of time but you wish to declare the margin at intervals.

Reassign Workflow

You can integrate your agency processes with Chase. When you set up Workflows, you select a specific user(s) (participants) who will be required to take action once the Workflow has been initiated. The purpose of the Reassign Workflow Wizard is to allow you to set up a substitute for the default participant in the event they are unavailable, e.g. on leave. You can also automatically reassign workflows for future dates.

The screenshot shows a window titled "Select a Chase Wizard to begin" with a search bar at the top. The window is divided into four main sections: "Jobs (3 of 3)", "Documents (4 of 4)", "Other (3 of 3)", and "Declarations (2 of 2)".

Jobs (3 of 3)	Documents (4 of 4)
Job Financial Notes Select Client, then update financial notes for the list of Jobs.	Capture Supplier Invoices Select Supplier, Status and Issue Date Range, then select the Purchase Orders you want to create Supplier Invoices for.
Job Notes Select Client, then update notes for the list of Jobs.	Financial Document Status Select Type of Document, Current and New Document Status, then select Documents to be changed.
Job Status Select Current and New Job Status, then select Jobs to be changed.	Create Internal Cost Sheets Create Internal Cost Sheets for multiple jobs
	Capture Payments Capture payments for invoices and credit notes

Other (3 of 3)	Declarations (2 of 2)
Activity Monitor View system usage	Cost Adjustment Wizard Declare Super profit/loss through estimated cost adjustments
Reassign Reminders Select a User to reassign active reminders	Job Margin Declaration Declare Job Margin By Percentage