

Accepting a Campaign Request

Published on 01/27/2022

NOTE: Campaigns are only available to Business and Enterprise Tiers

Accepting a Campaign Request

If you have the user permission to accept Requests in the system and you are assigned as an approver for a form, you will receive in-app and email notifications when a new Request has been submitted. To view a Request, select the Request name from the **My Requests** list, the notification itself, or the **Incoming Requests** live tile on your dashboard.

Requests	My Requests	Add Reque
My Requests Submitted By Me	Q.Sauch Q = List v # Filters v	
Shared With Me All Requests	A. Brepert Member (I) Archived Status Not Archived v 1-4 of 4	Clear v
MY VIEWS Change Requests	Addit regult	۰ 🖻
SHARED WITH OTHERS Open Requests Henry Harris - Due Next	Alumi - Iscoring Freihnen Maer - Prono	s 💂 🔟
+ Add View	UT Role - Bog	11 💂 🔟
	Summer Ernaler Tepning	14 😨 🖬 -

	Notifications	×
1	Christy Drucker submitted the request <u>Truesoap</u> Mother's Day Promotion 11 minutes ago	•

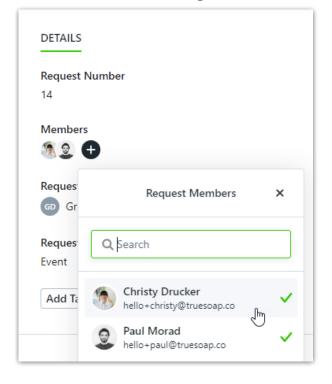
8	Good afternoon, Christy	۶			
	MY WORK ALL WORK				
⑦ Dashboard	Hot Sheet				
	Incoming Requests	Incoming Change Requests	Overdue Work	Awaiting Your Approval	No Active Proofs
	3	Requests	2	1	@
	-	1	_		
	My.Requests	My Change Requests	My_Work	My. Reviews	My Proofs
	Tasks & Proofs Due Next				
A People					

From the Request Details, you can view the requester name, Request information, attachments, and Request due date.



8 Requests	Summer Product Showing	& Submitted
C. My Requests Submitted By Me Stared With Me 41 All Requests	Report Program Const Substitution Auroped Complete Age 22 Age 22	DETAILS Respect Number 14 Members (*)
G Virves Cargo Reports Support Controls Marcel National Controls M	Reper Deals Image: Section Sectio	COMMENTS ACTIVITY

Depending on how your form is set up, a user can be set to automatically be notified of all new requests using that form. If you would like to begin assigning or reassign away from the default, you can unassign any other team members from the Request. Click the team member avatar(s) under **Members** and simply deselect the users that no longer need to be involved.



If you need clarification or additional details from the requester, you can @mention them from the **Comments** section of the Request. The requester will receive a notification of your comment and can reply to you at any point in time. You or the requester can also modify the Request as long as it is in the status of **Submitted**.



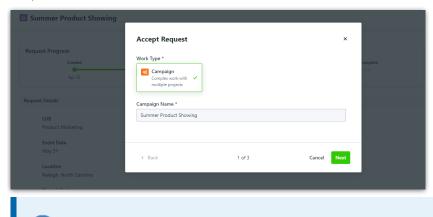
	@[emily@truesoap.com] Can you attach the product images that you would like to include in the video? Thanks!	
--	--	--

The requester will receive an in-app and email notification if the due date is changed after submission.

To accept the Request, click **Accept Request** in the bottom right-hand corner of the page.

Requests	Summer Product Showing	& Submitted
My Requests Submitted By Me Shared With Me All Requests	Request Progress Coned Solvented Accepted Complex P 2 4/0-22	DETAILS Request Number 14 Members (%)
NY VIEWS Change Requests SHARED WITH OTHERS Open Requests Henry Harris - Due Next	Report Details LOB Product Munkaring Detail Data Mary 31 Location Report Data Report Data Security Num Centrals Control OverHild Goal	Comments Activity
+ Add View	Present the new product line to a city-buildence. Video Auditions Greened consume traces Earline Earli	COMMAN Main a communi-

Next, you will be prompted to name your Campaign. By default, the Campaign will take on the name of the Request.



If you have Auto-Naming (https://guide.lytho.com/help/auto-naming) enabled for Campaigns, the Campaign Name box will be read-only and read "Campaign will be auto-named."



Once the Campaign name has been entered, select**Next**. Another prompt will request a Project name and a Project Template assignment if desired. The Project name will default to [Campaign Name] - [Request Form Submitted Name]. There will be as many prompts as the number of deliverables requested +1 for the Campaign. As an example, five deliverables will provide 6 prompts.

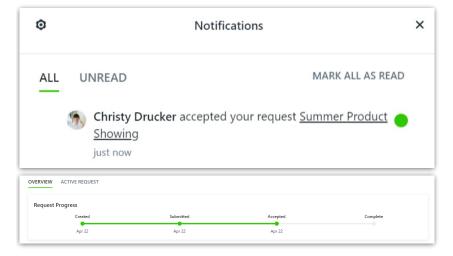
Summer Product Showing					
	Video			×	
Request Progress	Project Name *				
Created	Summer Product Showing	a - Video			
Apr 22	-				
	Project Template			_	
Request Details	Select project template		~		
LOB					
Product Marketing					
Event Date	< Back	2 of 3	Cancel Ne	ext	
May 31				- 1	

- If you have Auto-Naming (https://guide.lytho.com/help/auto-naming) enabled for Campaigns, the Campaign Name box will be locked and read "Campaign will be auto-named."
- If your Request form has the project template already mapped (https://guide.lytho.com/help/an-introduction-to-form-template-builder#form-building-tools), the configured field will be populated. You can change this value if needed.

When you are finished, select **Accept Request**. A pop-up notification in the bottom right-hand corner of the screen will confirm acceptance and provide a link to the newly created work item.

Request has been accepted. Campaign successfully created. Open Campaign. imes

Once the Request is accepted, the requester will receive in-app and email notifications as well as an updated progress bar on the Request.



After the Request is accepted, any team member with the permission to view the Request and work item will now see a link to the associated work item in the **Overview** section of the Request Details.



DETAILS
Request Number 14
Members
Requester Name GD Grace Deng
Request Form Event
Associated Work Summer Product Showing 005

Copying Campaign Request Files to Projects

If you have the **Copy Campaign Request Files to Projects*** feature (https://guide.lytho.com/help/generalsettings#copy-request-files-to-associated-work) enabled in your account settings, an additional option will be available when accepting working through the deliverable prompt(s). Select the box to the left of **Copy Request files to Project files** to copy. You will have the opportunity to select which files copy over for each deliverable on the Request.

Video		×
Project Name *		
Summer Product Showing		
Project Template		
Select project template		~
Copy request files to pro	oject files	
< Back	2 of 3	Cancel Next

Files attached to that deliverable Request will copy by default. Select**Show Files** to view and unselect any files you do not want copied to the associated Project.



Video		×
Project Name *		
Summer Product Showing		
Project Template		
Select project template		~
Copy request files to project files		Hide Files
1_Corporate Profile.pdf		
D_Video_Sunflow.avi		
< Back	2 of 3	Cancel Next

Once the Request has been accepted, the copied files will be found in the right side of the associated Project, under **FILES**.

DETAILS	FILES (2) MORE	
Add Files	~	
D	rag and drop to attach file	s.
	truesoap ad.png	
added Apr 0	1, 2021 at 12:21 pm	
	Flower_Image.jpg	
added Apr 0	1, 2021 at 12:21 pm	

□Video: Understanding Campaigns From Request To Creation

© 2024 Lytho, Inc. All rights reserved. | Privacy Policy (https://www.lytho.com/privacy-policy/) Have a friend who could benefit from Lytho? Refer them and get a \$200 gift card! (https://www.lytho.com/share-the-lytho-love/)