

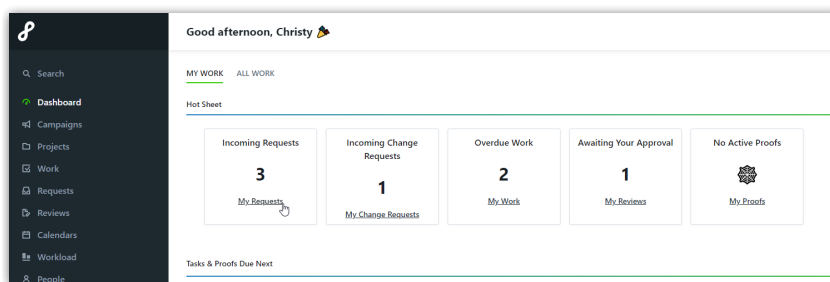
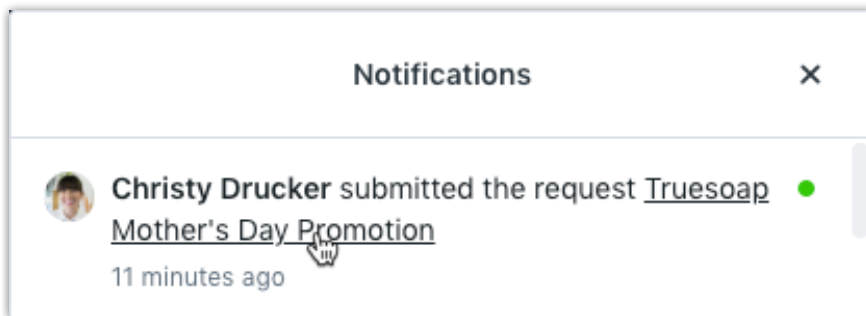
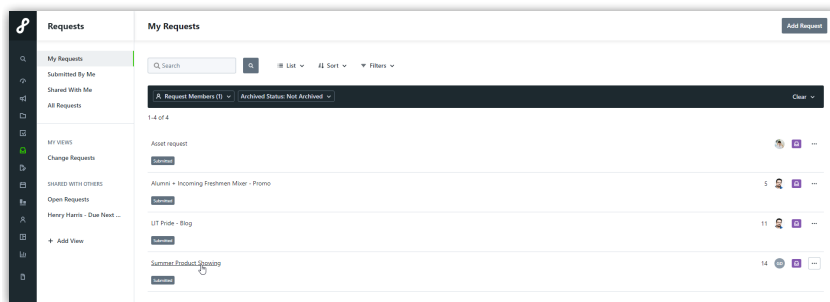
Accepting a Campaign Request

Published on 01/27/2022

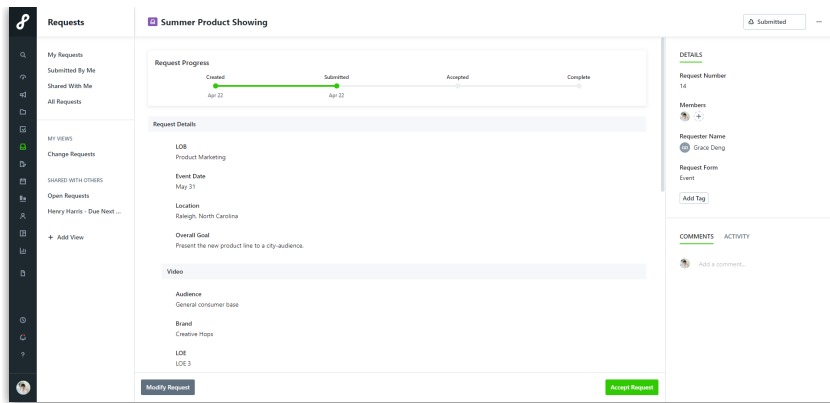
NOTE: Campaigns are only available to Business and Enterprise Tiers

Accepting a Campaign Request

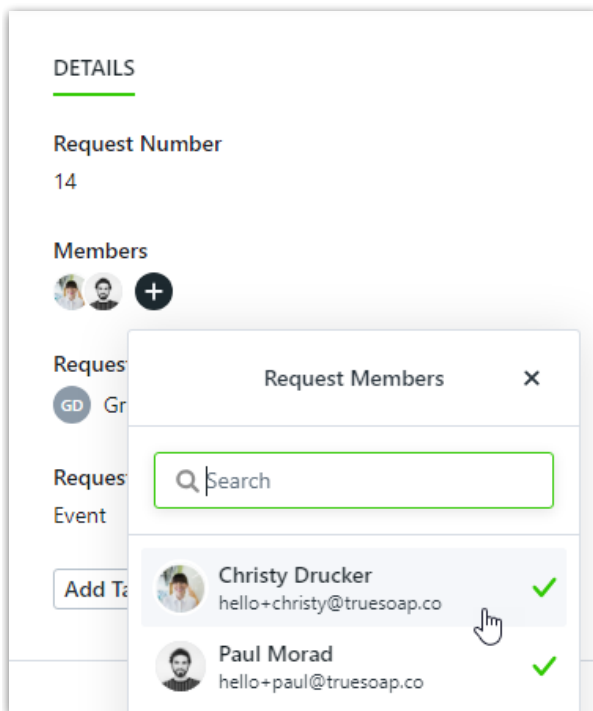
If you have the user permission to accept Requests in the system and you are assigned as an approver for a form, you will receive in-app and email notifications when a new Request has been submitted. To view a Request, select the Request name from the **My Requests** list, the notification itself, or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



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



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**.

COMMENTS ACTIVITY

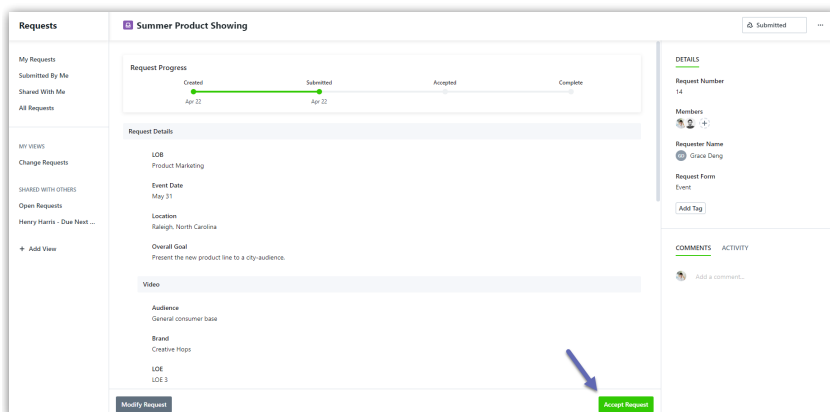


@[emily@truesoap.com] Can you attach the product images that you would like to include in the video? Thanks! |

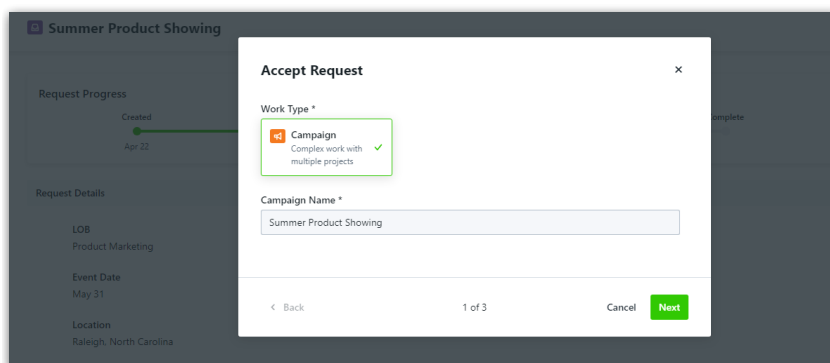


The requester will receive an in-app and email notification if the due date is changed after submission.

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

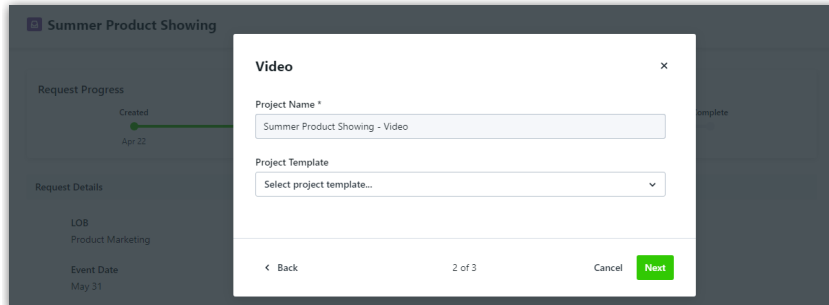


Next, you will be prompted to name your Campaign. By default, the Campaign will take on the name of the Request.




If you have [Auto-Naming](https://guide.lytho.com/help/auto-naming) (<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.

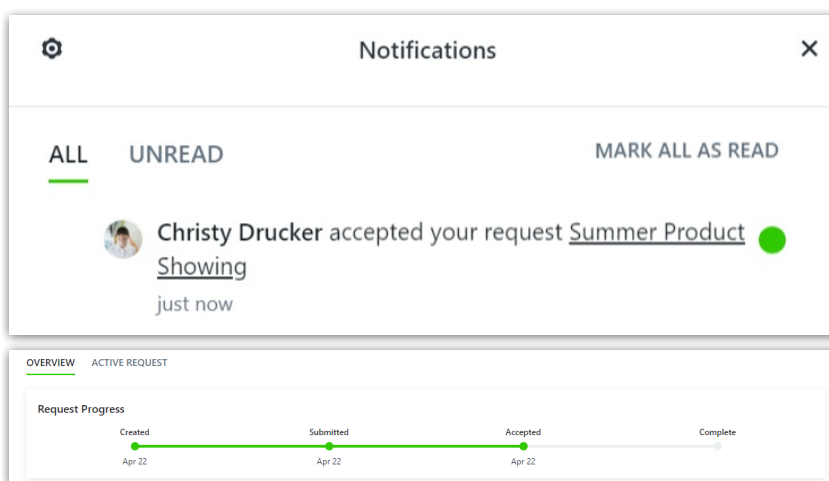



- If you have [Auto-Naming](https://guide.lytho.com/help/auto-naming) (<https://guide.lytho.com/help/auto-naming>) enabled for Campaigns, the Campaign Name box will be locked and read "Campaign will be auto-named."
- If your Request form has the project template [already mapped](https://guide.lytho.com/help/an-introduction-to-form-template-builder#form-building-tools) (<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](#). X

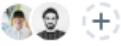
Once the Request is accepted, the requester will receive in-app and email notifications as well as an updated progress bar on the Request.




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
 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/general-settings#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 *

Project Template

☐ Copy request files to project 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


Drag and drop to attach files.



true soap ad.png

...

added Apr 01, 2021 at 12:21 pm



Flower_Image.jpg

...

added Apr 01, 2021 at 12:21 pm

Video: Understanding Campaigns From Request To Creation

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