

Stakeholder Tips & Tricks

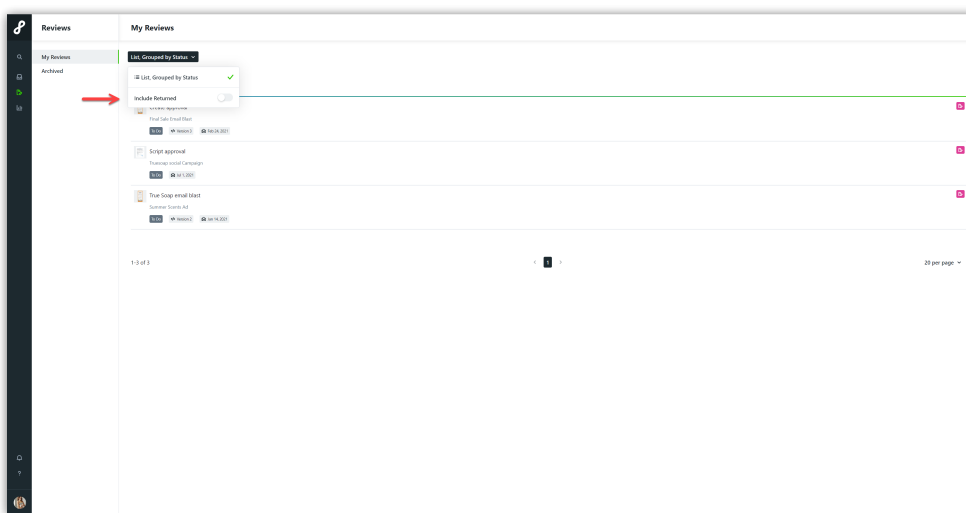
Published on 06/22/2023

Review + Approval

Reviews

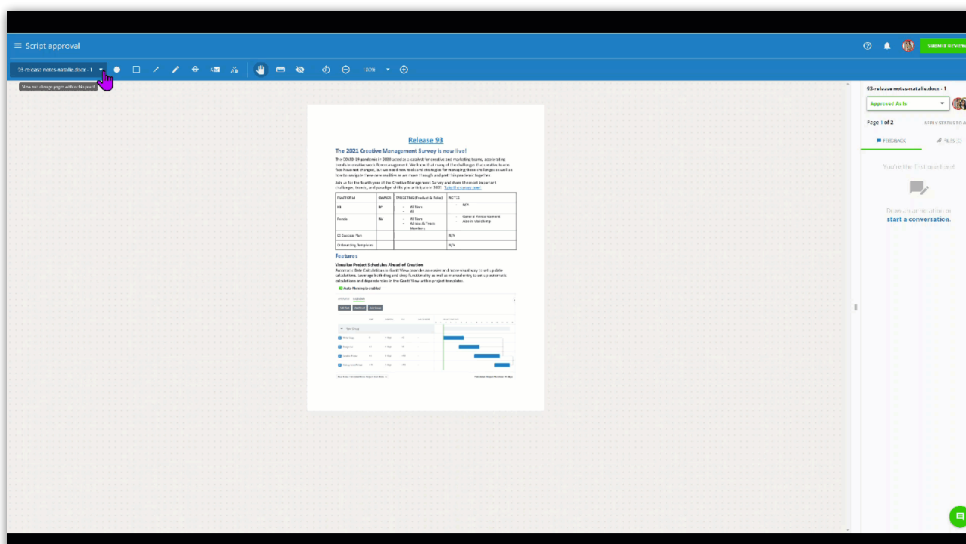
Include Returned Toggle

Toggle the **Include Returned** off and your Returned reviews will be hidden on the **My Reviews** page. This can be helpful when you have a lot of returned reviews and would only like to see your **TO DO** and **IN REVIEW BY OTHERS**.



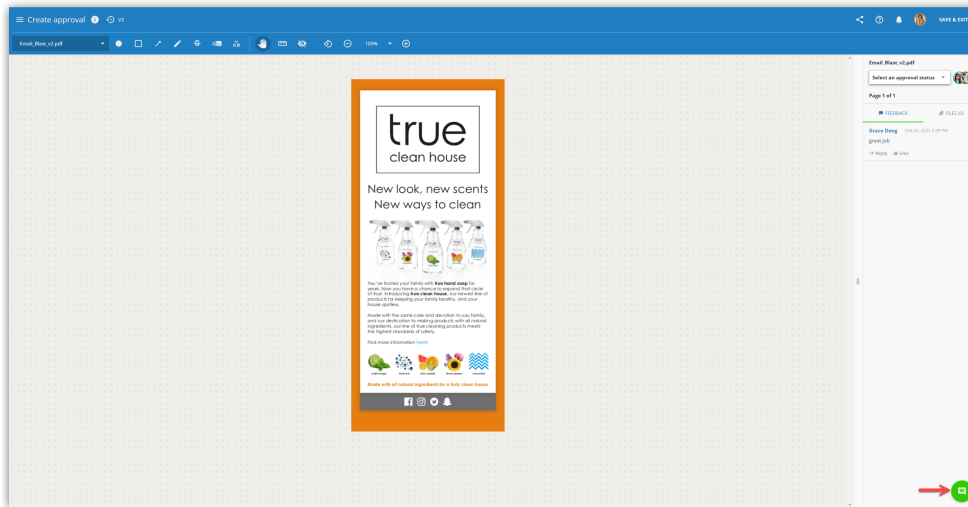
View and change pages within this proof

When viewing a multiple page review, there are two ways to navigate to different pages. You can use the drop-down menu to the left of the annotation tools to quickly navigate to specific pages in longer proofs. This also provides a thumbnail of each page and an overview of approval statuses that have left on each page. You can also use the arrows on the left and right of the canvas next to the asset to go page by page, ensuring nothing is missed.



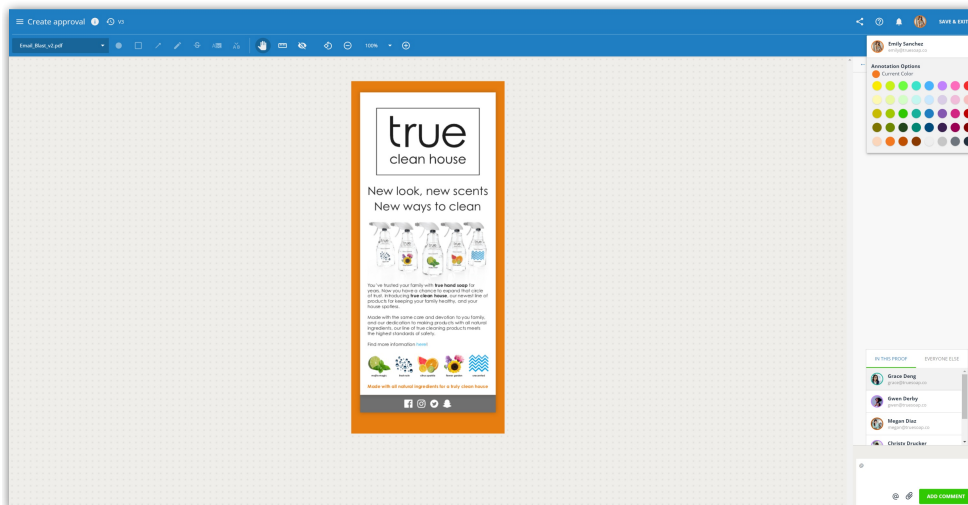
Start a conversation

Using the green **Start a conversation** icon in the bottom right corner lets you leave a general comment that isn't associated with an annotation mark.



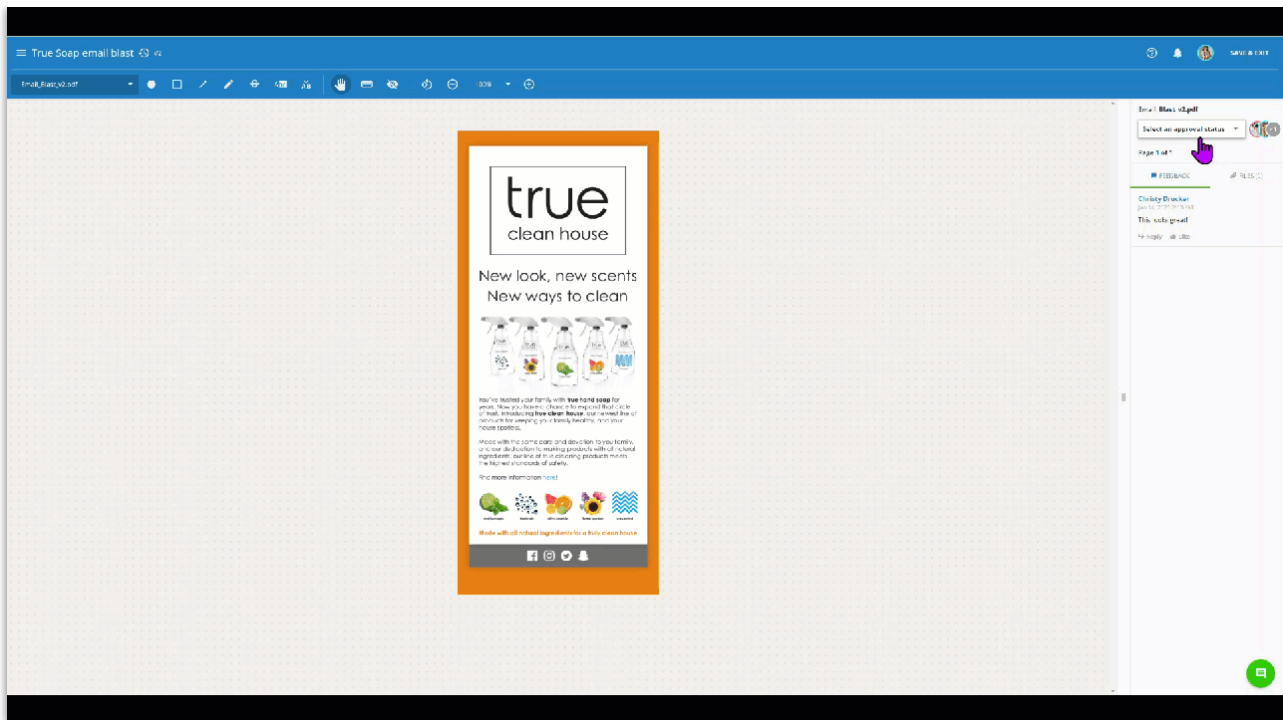
Annotation Color Options

If your annotation color blends in with the asset you are reviewing or if you would prefer a different color, you can change your annotation color by clicking on your profile icon at the top right corner. A drop down of color options will be available to choose from.



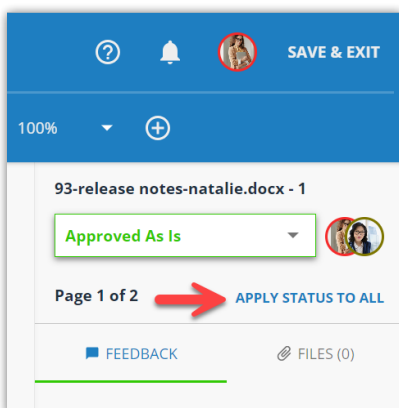
The annotation color is randomly assigned each time you enter a new review.

Approval Status

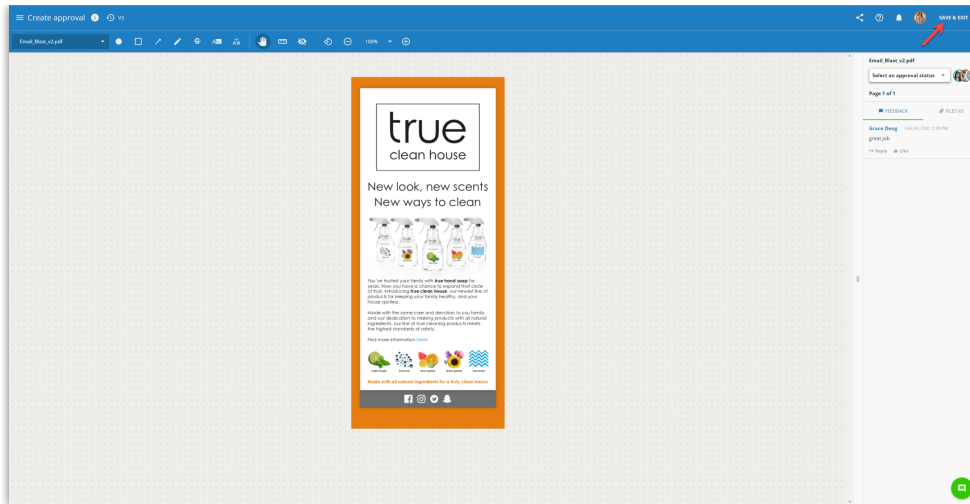


Your feedback isn't submitted back to the Creative team until you set an approval status on every page of the asset and click **SUBMIT REVIEW**.

When setting your Approval status for a multi-page review, you have the option to **APPLY STATUS TO ALL** once your status is selected. When you select **APPLY STATUS TO ALL**, you will apply the current status to every review page. This could override any review statuses applied to a page individually. We recommend using this feature after you've added an approval status to your first page.



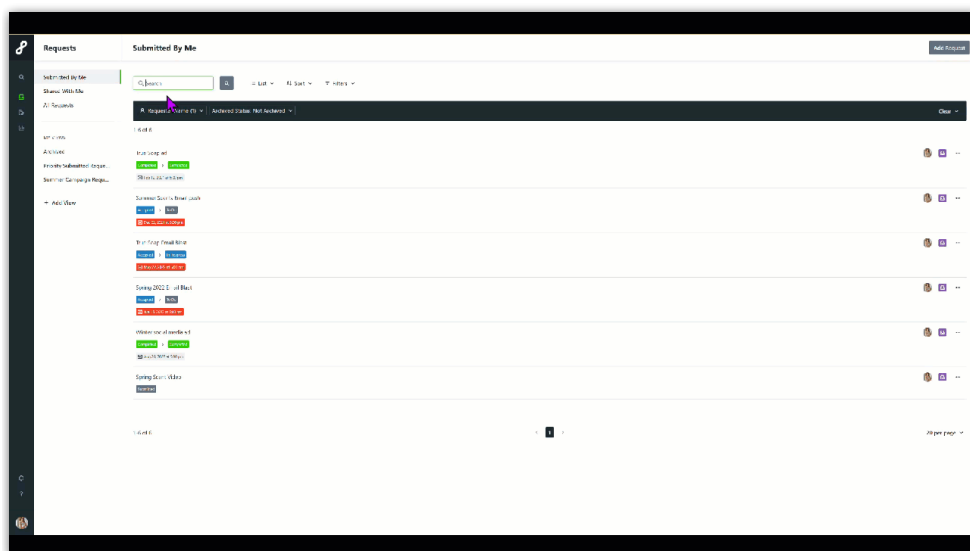
You will be able to **SAVE & EXIT** the review only if you have not selected an approval status. This will allow you to navigate back to your Reviews page and come back at a later time to finish reviewing.



Requests

Searching For Specific Requests

Enter a keyword in the Search field to find a request relating to that term. The Search field on the Request page will only search through the Requests this view has access to. The global search bar in your side panel searches everything in your system that you have access to.



Request Details Page

Once you submit your request, you will be taken to the Request Details page. There are a few things to note on this page.

Members

This list contains the Team Members that you can collaborate with during your requests acceptance or working project stages.

Submitted

DETAILS

Members

Due Date
Due Aug 21

Requester Name
Emily Sanchez

Request Form
True Soap Social Media Request

Tags
SOCIAL MEDIA CUSTOMER C...

COMMENTS

Add a comment...



This list may differ from the Team Members directly working on your project.

Comments

You can start collaborating with the Request Members by @mentioning them to start a conversation. If the **Request Sharing** feature is enabled, you will be able to collaborate with other members in your organization.

Submitted

DETAILS

Members

Due Date
Due Aug 31

Requester Name
Emily Sanchez

Request Form
True Soap Social Media Request

Tags
SOCIAL MEDIA CUSTOMER C...

COMMENTS

@

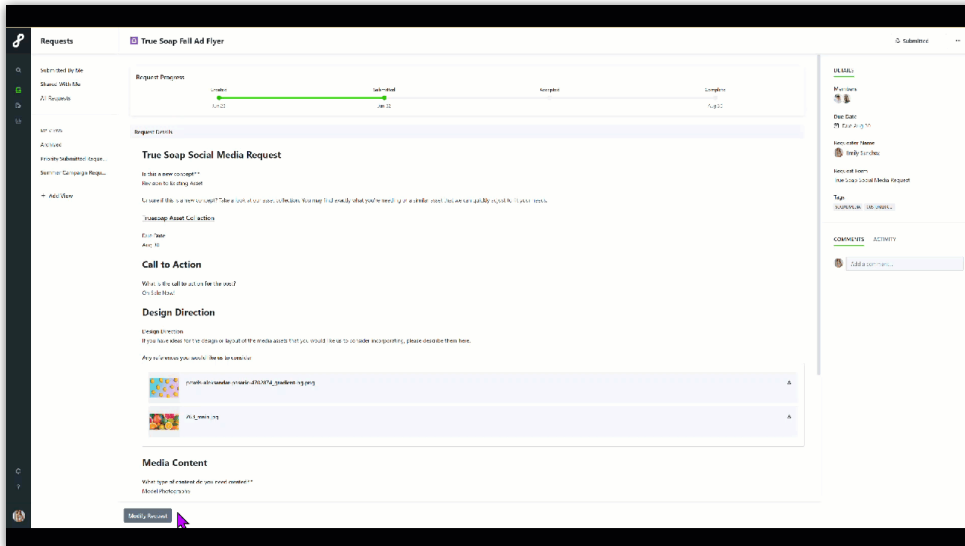
- Calli Edgerton
natale.williams@lytho.com
- Grace Deng
grace@truesoap.co
- Gwen Derby
gwen@truesoap.co
- Megan Diaz
megan@truesoap.co



@mentioning someone in a Request comment will send them a notification letting them know they have been added to the conversation.

Modify Request

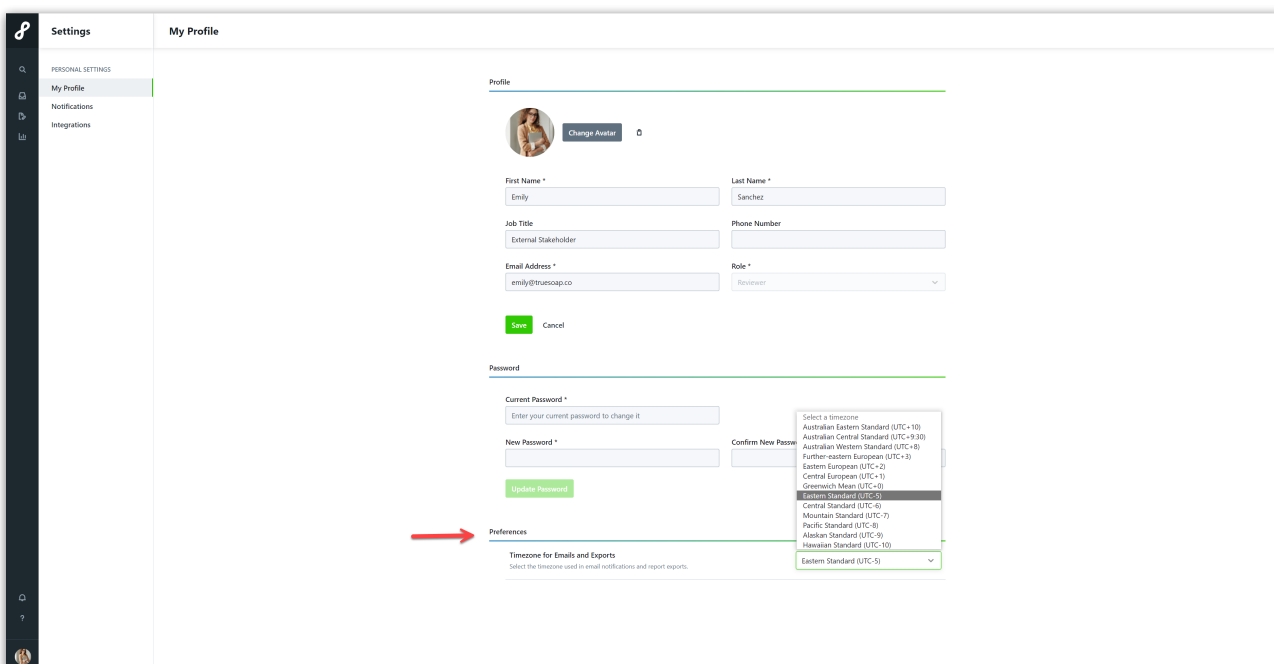
After your request is submitted, you are able to modify the request by clicking on **Modify Request**. You will be able to modify the information you input on the form up until your request has been **Accepted**. Once your request has been accepted, you will no longer be able to modify it. However, continued collaboration on requests can occur in the Request Comments section where files can also be attached to a comment.



Personal Preferences & Notifications

Preferences

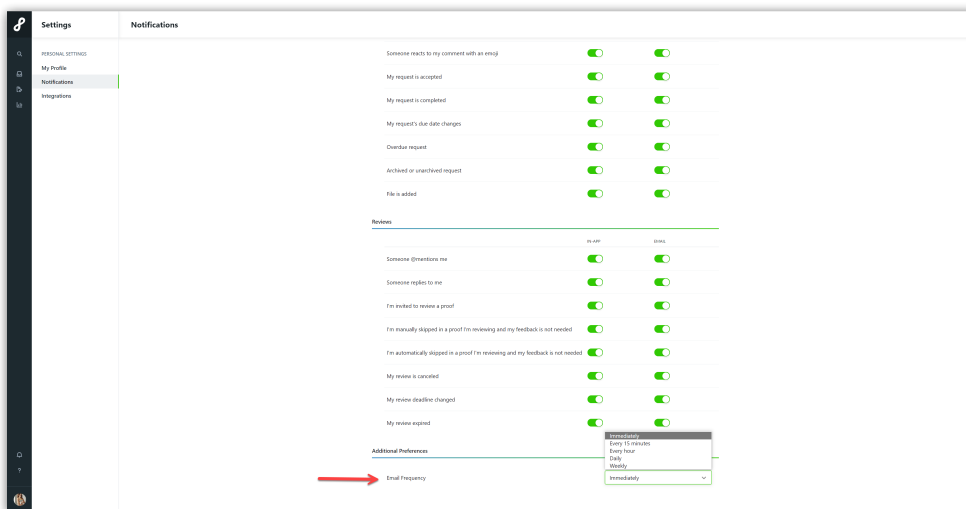
In your **Personal Settings** there is a **My Profile** tab, you will be able to set your **Timezone for Emails and Exports**. Notifications default to your PC's time zone but can be changed as needed. This will ensure you get notifications based on the time zone you are in.



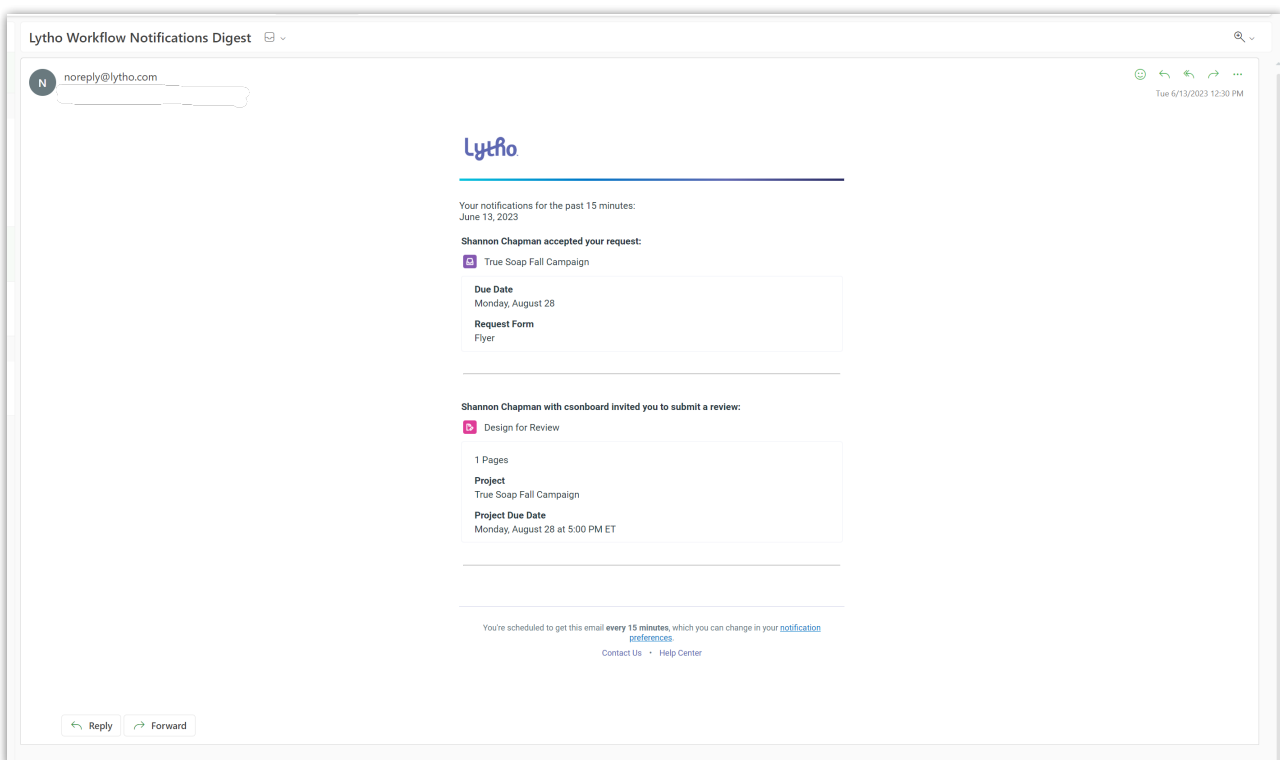
Notifications

In your **Personal Settings**, there is a **Notifications** tab, you'll be able to set notification preferences for both IN-APP and EMAIL. At the bottom of the menu, under **Additional Preferences**, you can set your notification frequency. Changing your digest option will batch your notifications together and send them according to the option selected.

- **Immediately** - individual email, sent immediately
- **15 minutes** - batched emails, sent in 15 minute intervals based on the time it was set
- **Hourly** - batched emails sent in hourly intervals based on the time it was set
- **Daily** - batched emails sent every morning at 9am
- **Weekly** - batched emails sent every Monday morning at 9am



Below is an example of a digest notification. You will be able to navigate directly from the email to the notification you'd like to address first.





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