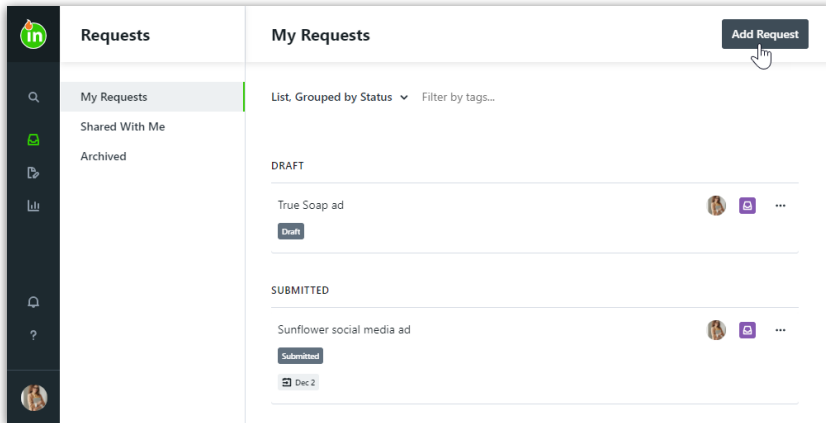


# Submitting a New Request

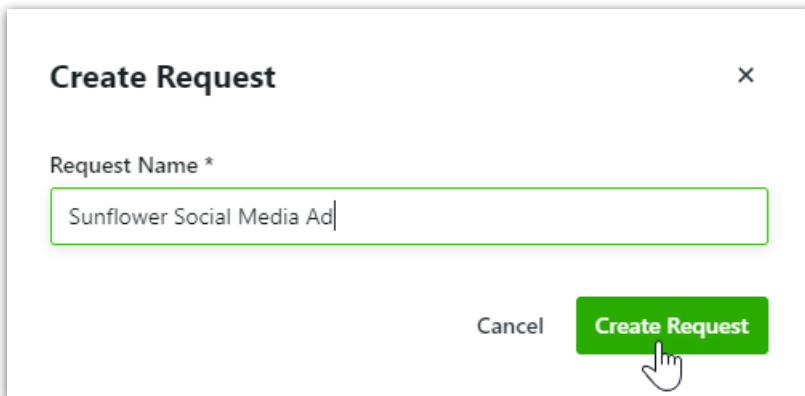
Published on 03/11/2021

## Creating a Request

To begin a new request, select the Requests icon from the global navigation menu. Click **Add Request** in the top right-hand corner of the screen.

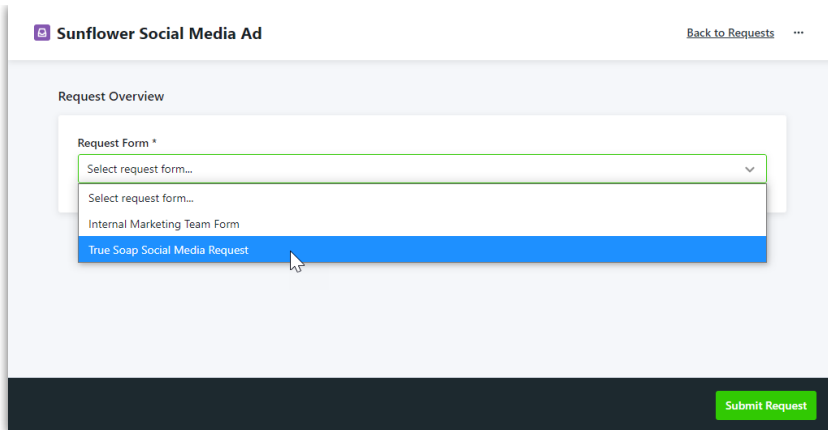


Enter a name for your request and select **Create Request**.

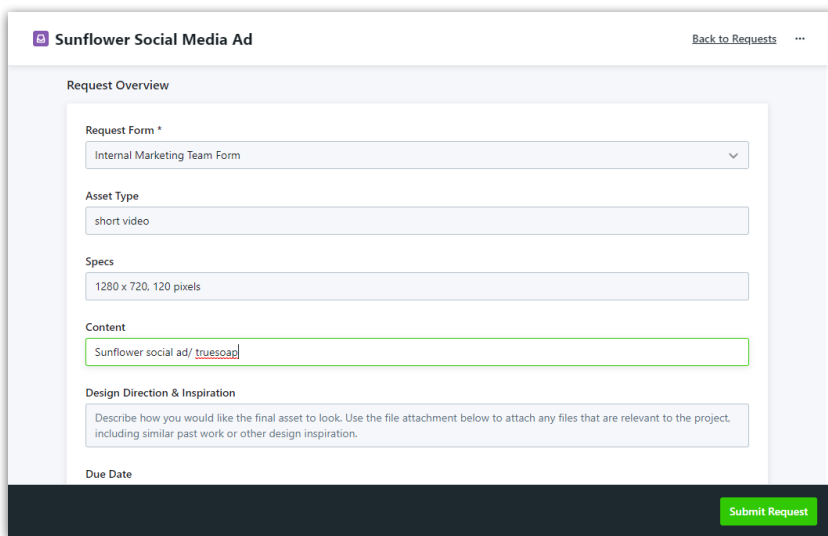


The screenshot shows the 'Create Request' modal form. It has a title 'Create Request' and a close button 'X'. Below the title is a label 'Request Name \*' followed by a text input field containing 'Sunflower Social Media Ad'. At the bottom of the form are two buttons: 'Cancel' and 'Create Request'. A hand cursor is pointing at the 'Create Request' button.

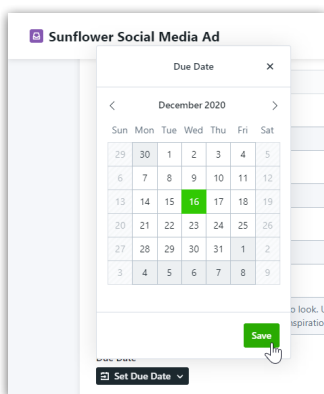
Depending on your permissions, you may have multiple request forms to choose from. Each form will dictate the fields and information required in order to submit your request. Choose the form most applicable to your request. If you do not see a form as expected, contact your account administrator.



Once selected, the form will populate. Complete the request form in detail and be sure to fill out any required fields, denoted with an asterisk.

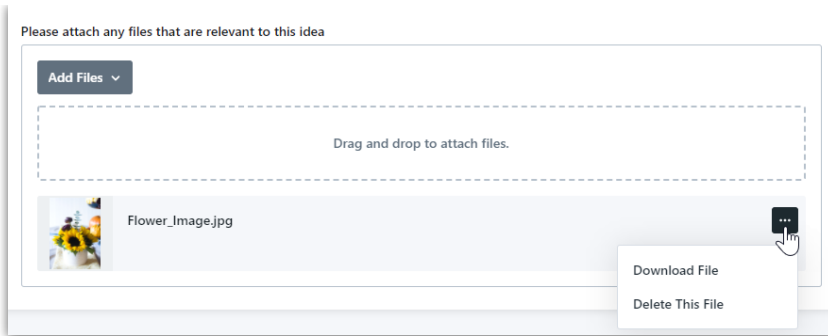


If your request has the option to select a date, various dates within the calendar may be grey, indicating they cannot be selected due to required lead times for select requests.

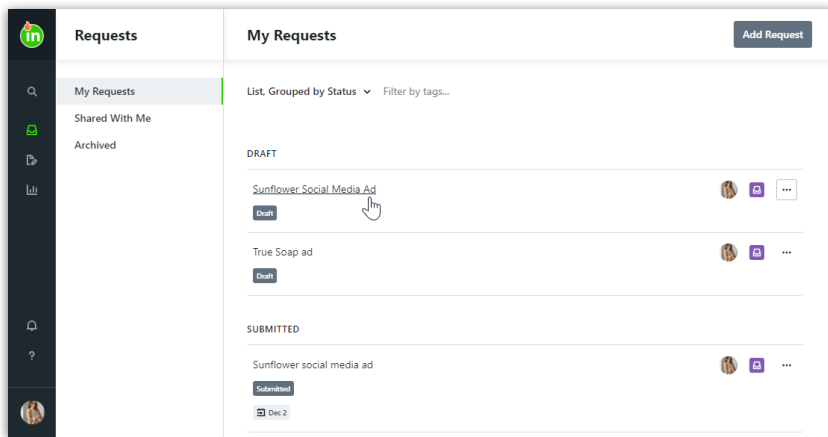


If your form has the ability to add attachments to your request, you can drag and drop files from your computer into the available field. If you would like to browse your computer file menu instead, start by clicking on the drag and drop field.

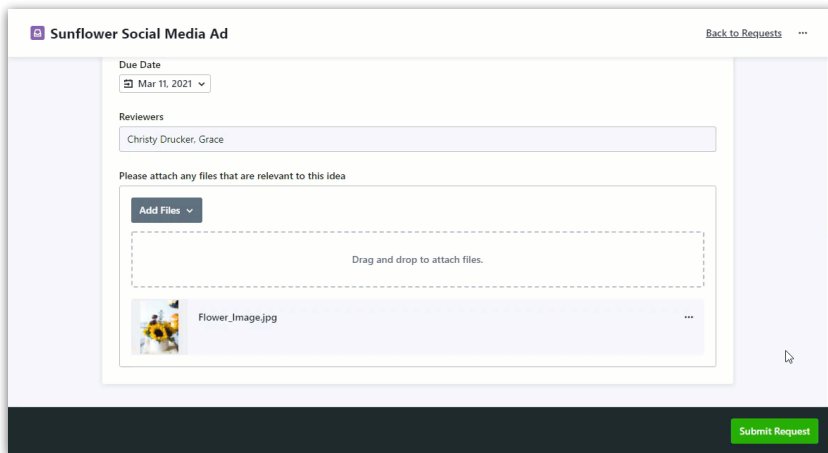
To remove or download request attachments, click the actions menu to the right of the relevant file.



Your request data is automatically saved as you fill out the form. Any forms that are not yet submitted will appear in Draft status.



Click **Submit Request** to finalize your submission.



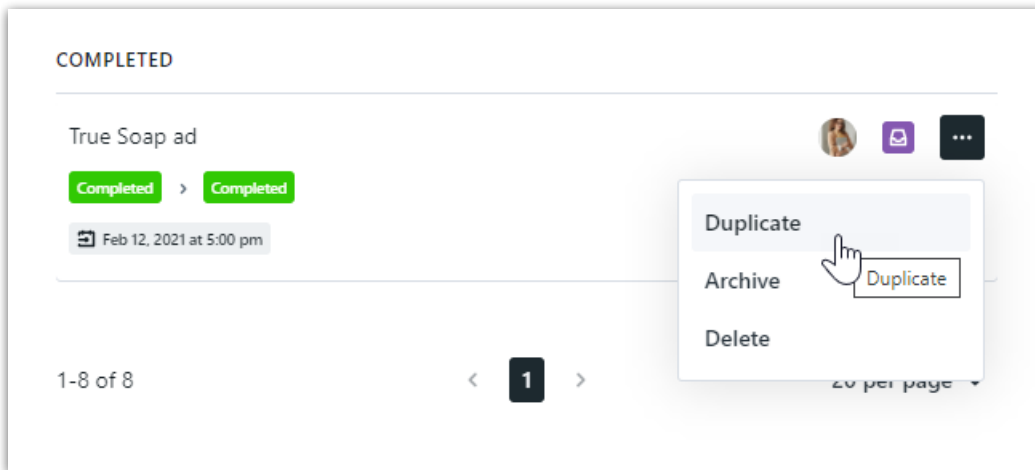
Once you have submitted your request, you will see the Request Details, where you can view the status of the request, modify the request, and collaborate with relevant team members.

## Duplicating a Request

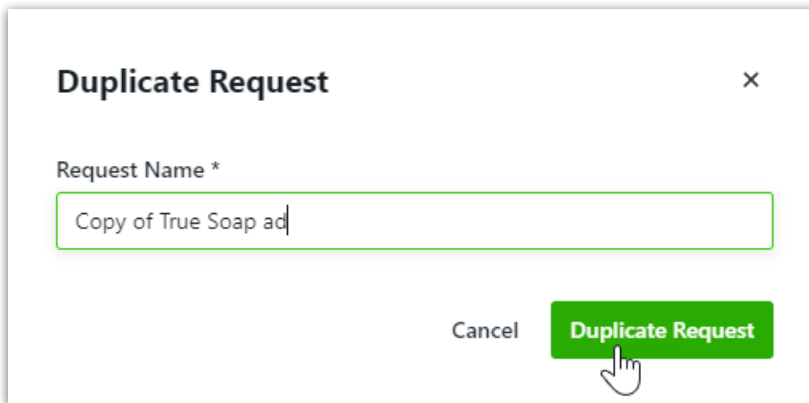
Duplicating requests is a great way to cut down on repetitive work if you are requesting similar deliverables often.

**i** When a request is duplicated, the properties of the request form are also duplicated, even if the request form has since been updated. We recommend only duplicating recent requests, and ensuring that request form changes have not been made prior to duplicating.

From your requests list view, click the actions menu to the right of the request you would like to duplicate and select **Duplicate**.



You will be prompted to create a new request name. Select **Duplicate Request** when complete.

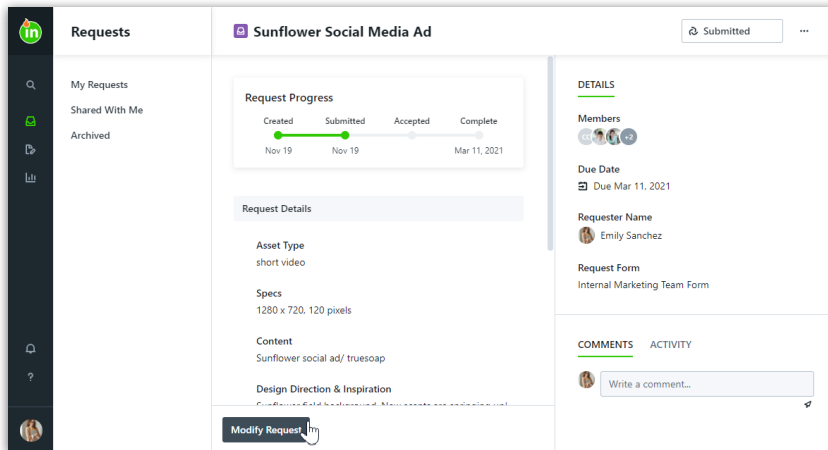


Your new request will be located in your Draft section where you can update any information and submit when ready.

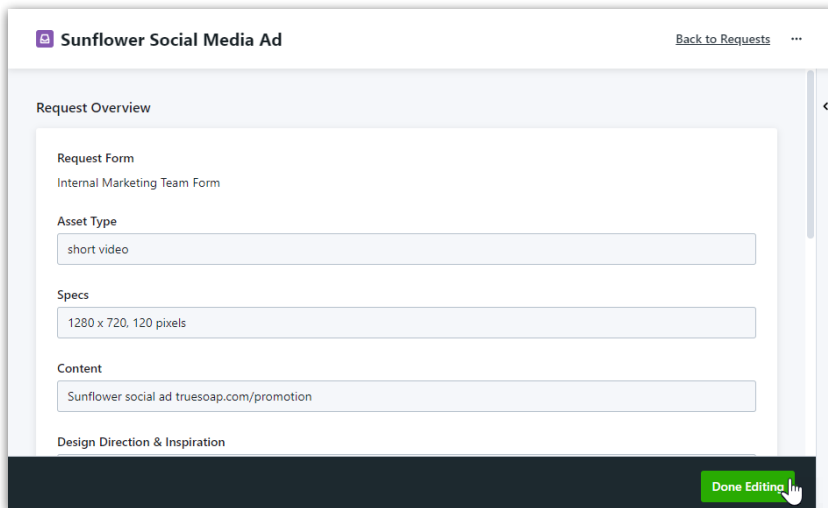
## Modifying a Request

**i** You can only modify a request in a status of Draft or Submitted. Once the request is Accepted, you will no longer be able to edit the request details. However you can still collaborate with your creative team.

To modify an existing request, select your request name from the **My Requests** list. From the request details page, click **Modify Request** near the bottom of the page.



Make any applicable changes to your request and click **Done Editing**.



Any edits made to the request will be captured in the request activity feed. Select **Activity** to view any relevant changes.

## COMMENTS

## ACTIVITY



**Emily Sanchez** changed this request's What is the call to action for the post? Please provide any relevant URL(s). to *Sunflower promotional page, truesoap.com/promotion*

5 minutes ago



**Emily Sanchez** submitted this request

18 minutes ago



**Emily Sanchez** changed this request's due date to *Jun 22, 2018*

30 minutes ago



**Emily Sanchez** created this request *Sunflower Social Media Video*

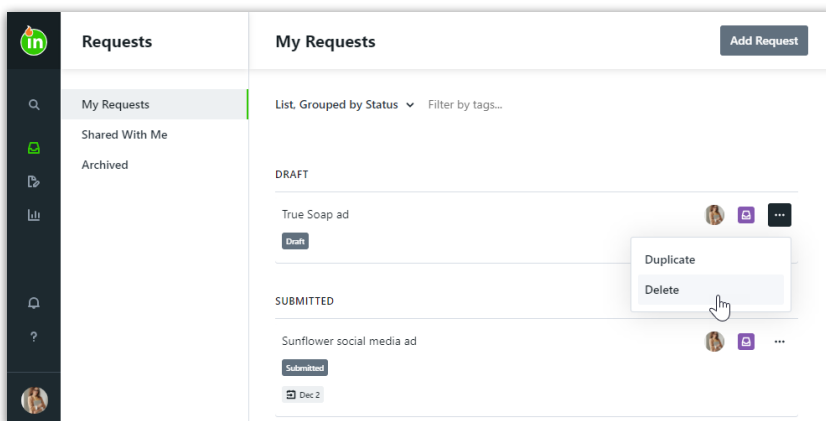
an hour ago

## Deleting a Request



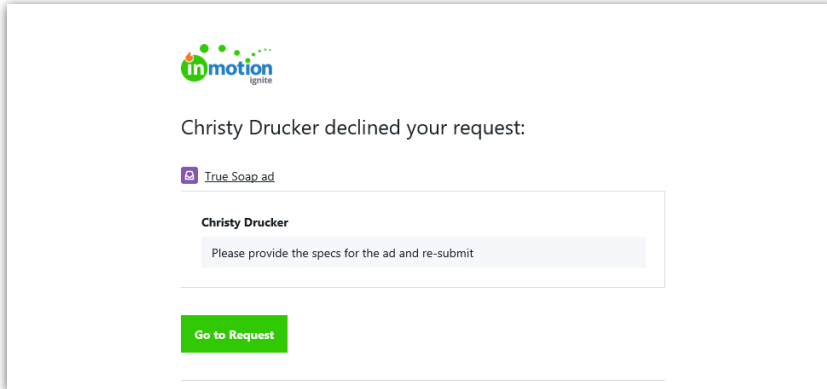
Depending on your permissions, you may only have the ability to delete requests in Draft state.

To permanently delete an existing request, navigate to the **My Requests** list. Click the action menu to the right-hand side of the request and select **Delete**. You can also delete a request from the action menu found in the top right of the request details page.

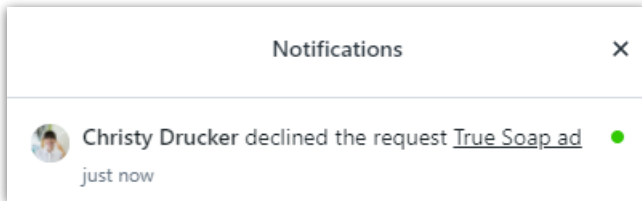


## Declined Requests

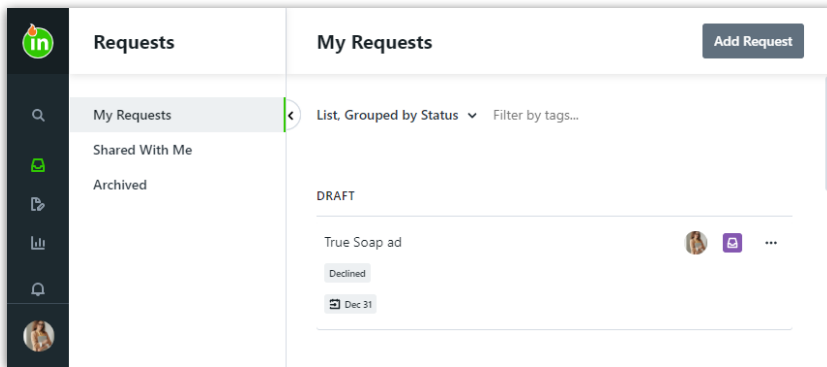
Request acceptors have the option to decline a request and a reason must be given. If your request is declined, you will receive an email notification including who declined the request and the reason provided.



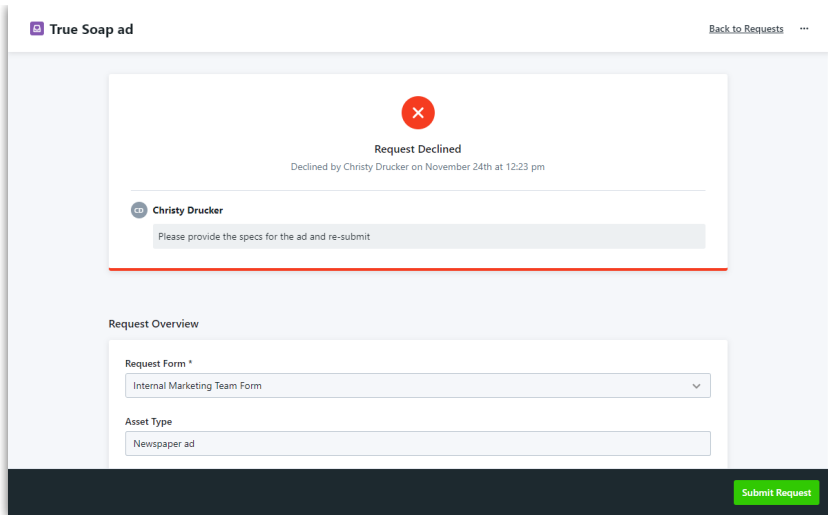
You will also receive an in-app notification.



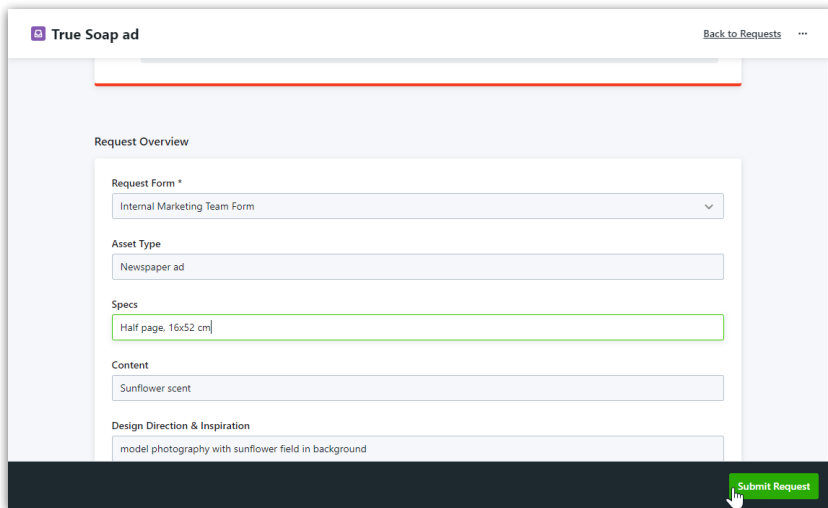
Your declined request will be in the Draft section of your requests, with a badge indicating it was declined.



Click into the request to see the reason your request was declined and edit your request.

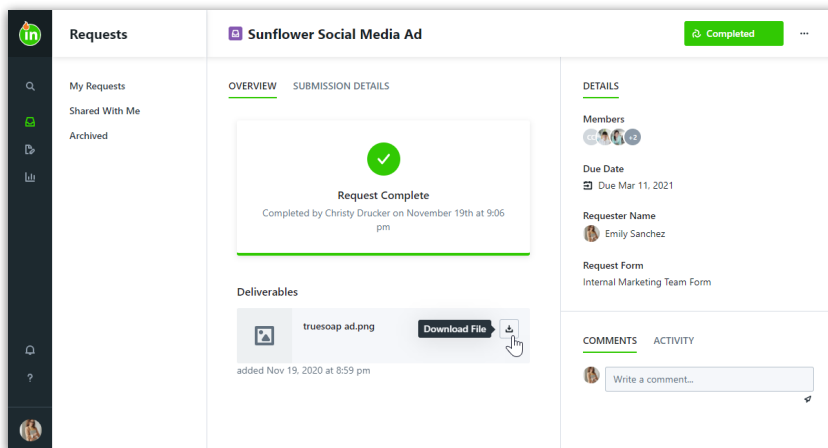


Once you have made the appropriate edits, click **Submit Request** to re-submit.



## Accessing a Deliverable from a Completed Request

Once you have been notified that that your request is complete, you can access the deliverable from the request details page in the **OVERVIEW** tab.



Select the download icon to download the deliverable files.



