Request Sharing

Published on 04/20/2020

When request sharing is enabled in your account, stakeholders and team members can @mention and share the request with others to answer questions throughout the project lifecycle, and it will ensure visibility and access to final deliverables when the project is complete. To take advantage of this feature, you'll need to enable the feature in your account settings and then assign the permission to the user roles who need to share requests.

NOTE: Request Sharing is only available for Business & Enterprise Tiers.

Enable Request Sharing

To enable **Request Sharing** for your account, navigate to the **Features** tab in your **Account Settings** sub-navigation menu. Click the toggle to the left of the **Request Sharing** option to enable this feature.
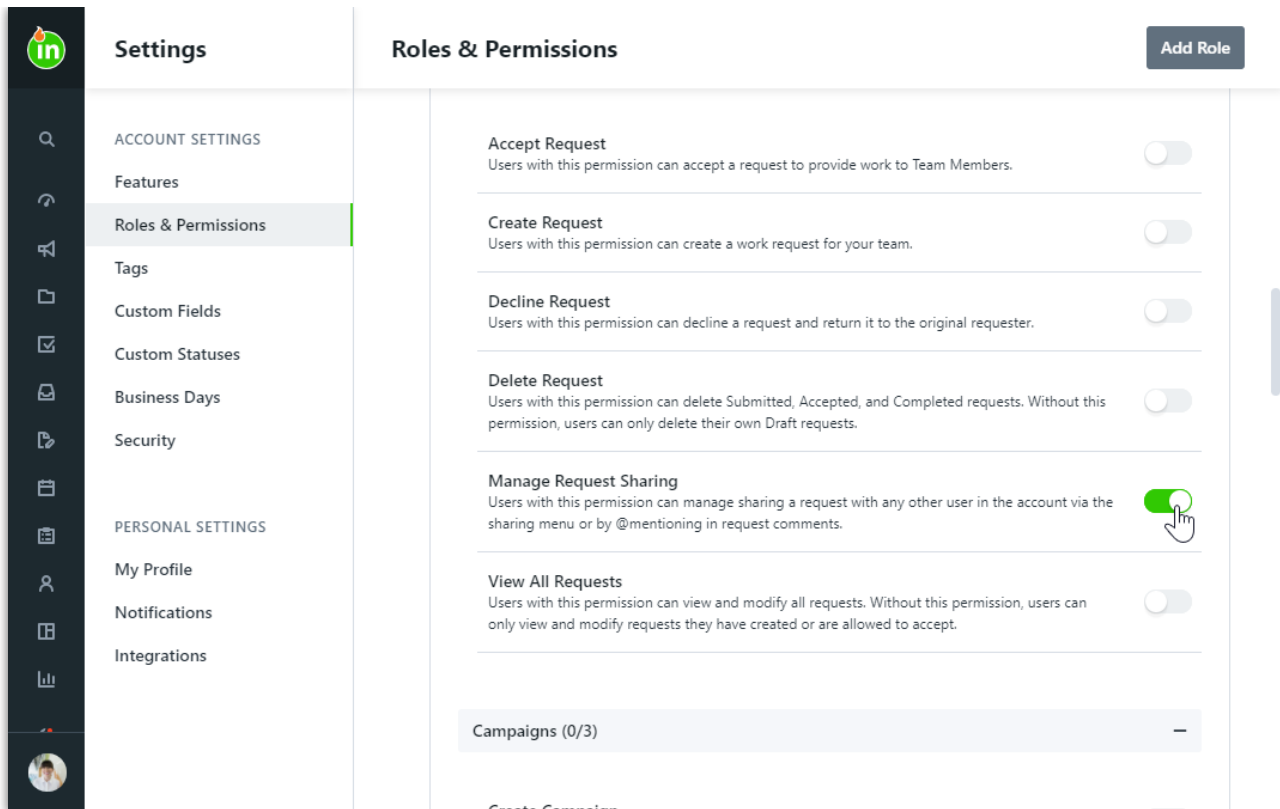

Manage Request Sharing Permission

To allow team members or stakeholders to share requests, you will need to assign the **Manage Request Sharing** permission to the applicable user roles.

From the **Account Settings** sub-navigation, select **Roles & Permissions**. Navigate to the role you would like to assign this permission to and select **Edit.** Under **Requests** in the **Permissions** sub-navigation, select the toggle to the right of **Manage Request Sharing**.

Scroll to the bottom of the permissions and click **Save** when complete.

> ℹ️ Any user assigned to a role that includes the permission to **Manage Request Sharing** will be able to search for and see the names of all team members and stakeholders within your account when sharing a request.

Share a Request

Once a request is submitted, any user with the permission to **Manage Request Sharing** can share a request by @mentioning another stakeholder or team member in the **Comments** tab of the request. Begin by typing the "@" symbol and search by the first name of the person you would like to share the request with. A user list will populate as you begin typing and you can click to select the appropriate user. The user's email address will display while composing the comment, and once posted, your comment will reflect their full name.

You can also share a request by clicking the actions menu at the top right of the request view and selecting **Share.** Search for and select the individual(s) you would like to have access to the request.

View a Shared Request

When a request has been shared with you, you will be notified by in-app and email notifications. You will also be able to see the shared request in the **Shared With Me** view under **Requests**.
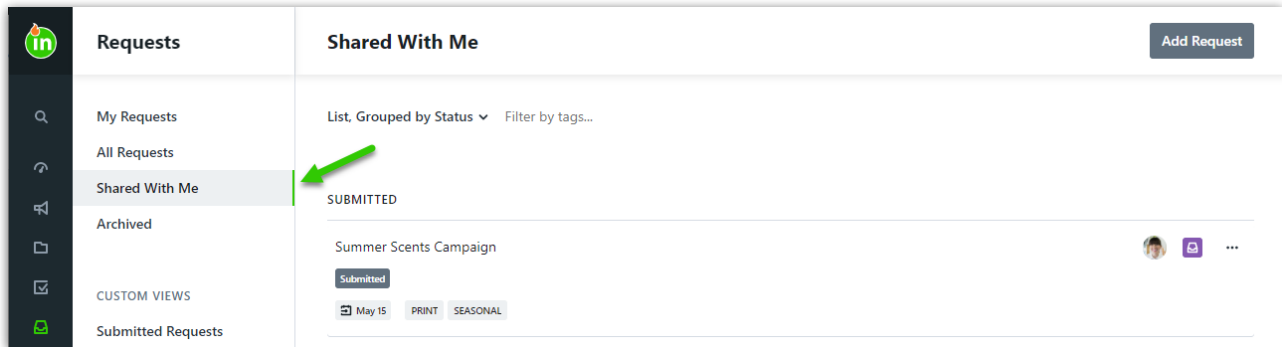
Users that have access to shared requests can collaborate on the request, duplicate the request, and download attachments and final deliverables.