

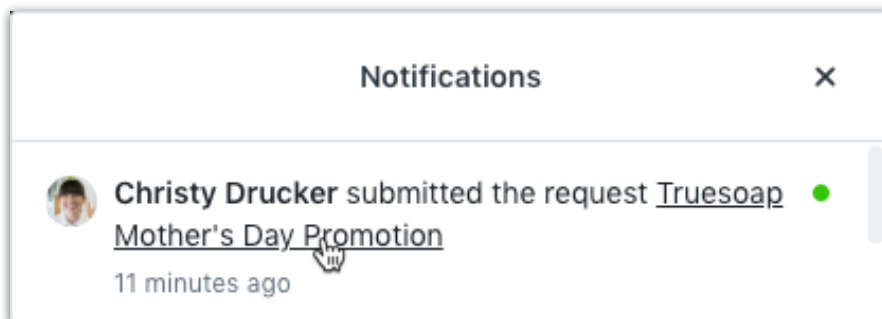
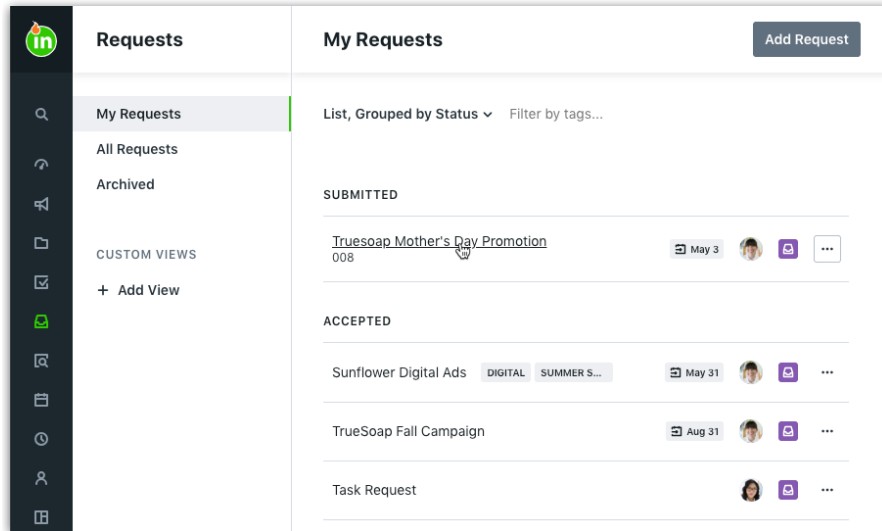
Accepting a Campaign Request

Published on 04/03/2021

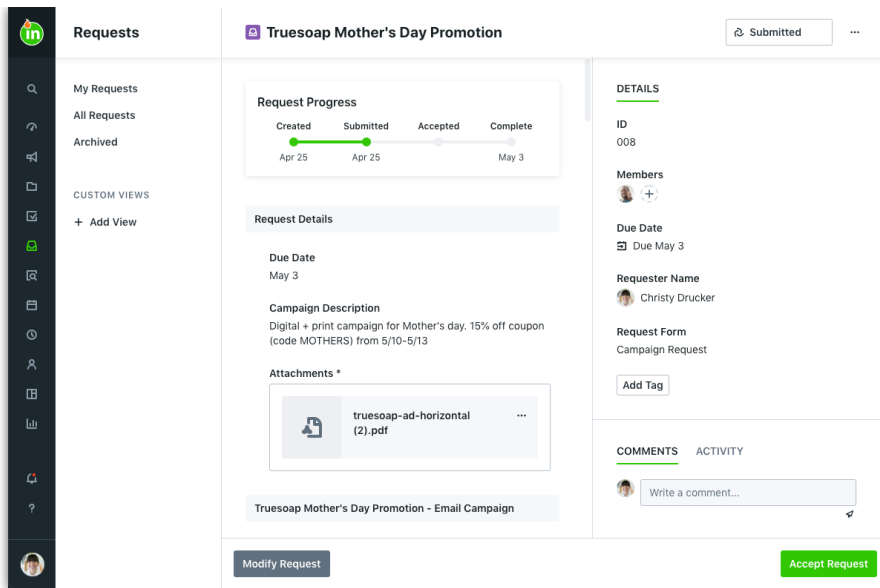
NOTE: Campaigns are only available to Business and Enterprise Tiers

Accepting a Campaign Request

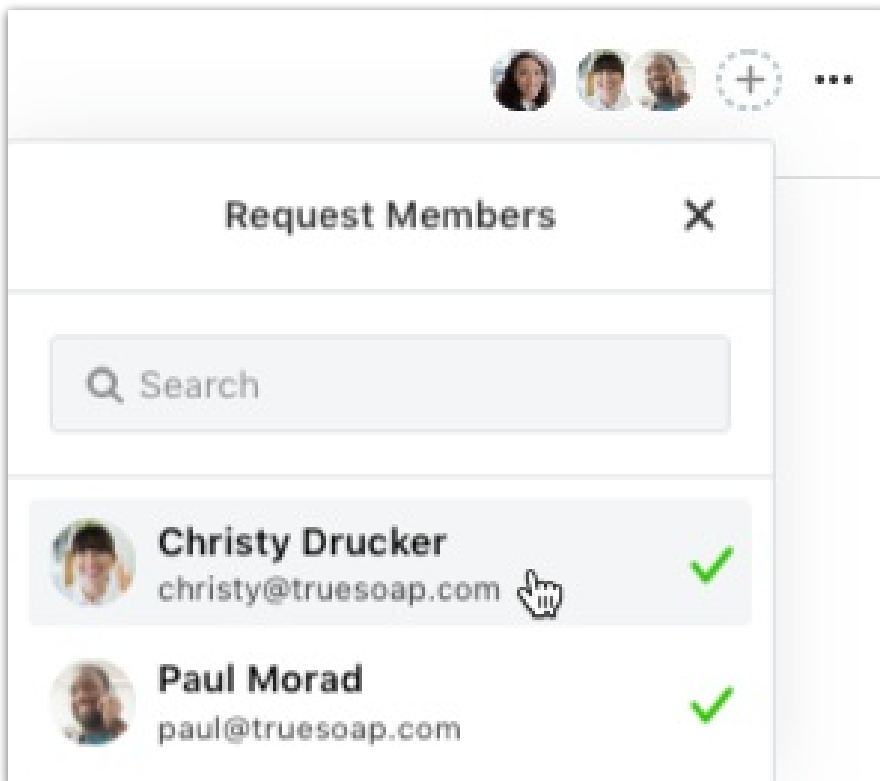
If you have the user permission to accept requests in the system, you will receive in-app and email notifications when a new request has been submitted. To view a request, select the request name from the **My Requests** list or from the notification itself.



From the request details, you can view the requester name, request information, attachments, and request due date.



By default, any team member with the permission to **Accept Request** will be assigned and notified of the new request. If you would like to take ownership of the request acceptance, you can unassign any other team members from the request. Click the team member avatar(s) in the top right-hand corner 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! |

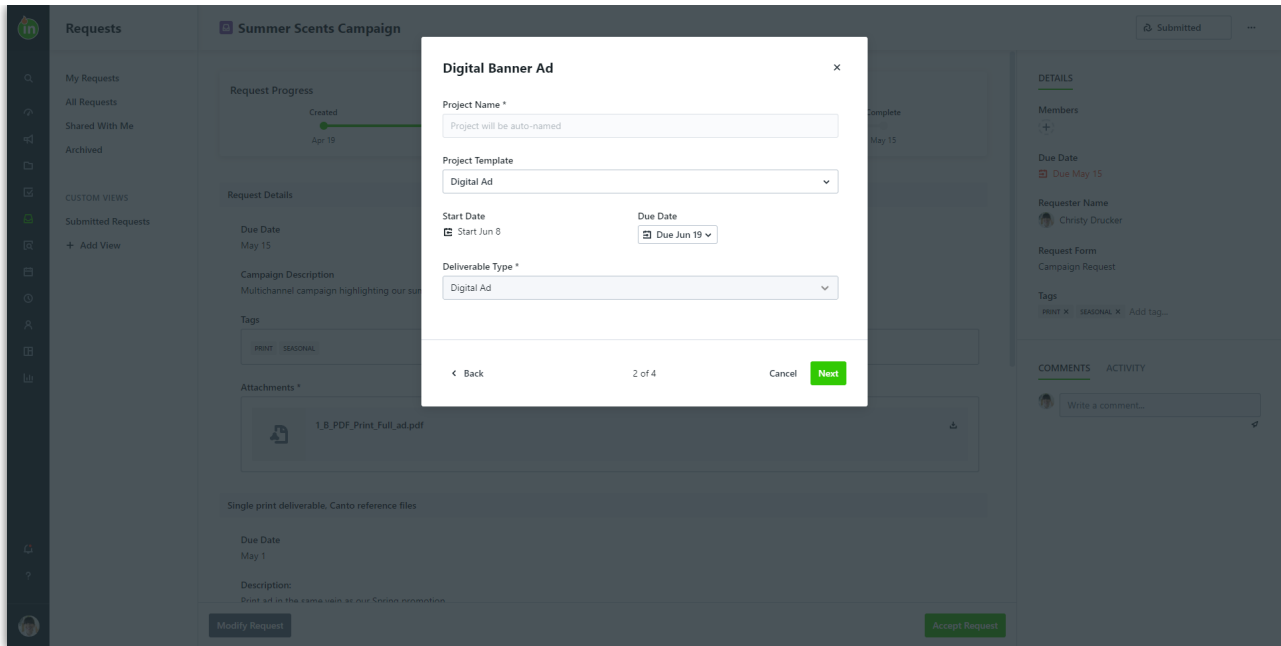


The requester will receive an in-app and email notification if the due date is changed after submission.

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

The screenshot shows a web interface for managing requests. On the left is a sidebar with navigation options like 'My Requests', 'All Requests', and 'Archived'. The main content area is titled 'Truesoap Mother's Day Promotion' and includes a 'Request Progress' bar showing stages: Created (Apr 25), Submitted (Apr 25), Accepted, and Complete (May 3). Below this is a 'Request Details' section with fields for 'Due Date' (May 3), 'Campaign Description' (Digital + print campaign for Mother's day, 15% off coupon (code MOTHERS) from 5/10-5/13), and 'Attachments' (truesoap-ad-horizontal (2).pdf). On the right, a 'DETAILS' panel shows 'ID 008', 'Members' (+), 'Due Date' (Due May 3), 'Requester Name' (Christy Drucker), and 'Request Form' (Campaign Request). At the bottom right, there is a green 'Accept Request' button.

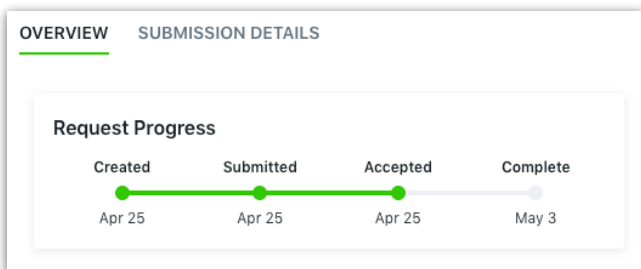
Next, you will have an opportunity to review any required custom fields, dates, and project templates associated with the campaign's deliverables. Follow the paginated wizard to make your selections for each project. Once complete, click **Accept Request**.



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.



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



Internally, 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.

Requester Name



Christy Drucker

Request Form

Campaign Request

Associated Work



Truesoap Mother's Day Promotion



Copying Campaign Request Files to Projects

If you have **Copy Campaign Request Files to Projects*** enabled in your account settings, this is how the accept request modal will appear when accepting deliverables. 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.

Sample Print Form ×

Project Name *

Project Template

 ▼

Copy request files to project files

Department *

 ▼

← Back 2 of 4 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.

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

