

Requester Insights

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Requester Insights

NOTE: Requester Insights are only available for Business and Enterprise Tiers

Want to avoid one-off status updates? Allow requesters to view a dashboard that provides even greater transparency.

To enable Requester Insights, navigate to **Account Settings > Features** and select the toggle next to Requester Insights.

	Settings	Features
م	ACCOUNT SETTINGS	Requester Insights
0	Features	Allow requesters to see read-only information about the work being done for their requests. When enabled, requesters will be able Edit
° ≰	Roles & Permissions	

Once enabled, requesters have a read-only view of associated work, including:

- Names
- Statuses
- Project progression
- Project work groups
- Start dates
- Due dates

٥	Requests	Truesoap Mother's Day Promotion	ලි Accepted
त २	My Requests All Requests Archived	OVERVIEW SUBMISSION DETAILS Request Progress	DETAILS Members
F		Created Submitted Accepted Complete	Due Date
	CUSTOM VIEWS	May 6 May 6 May 7	🗊 Due May 7
	+ Add View		Requester Name
Θ			Chisty Drucker
۵		1/3 2/2 1	Request Form
Ħ		Projects Completed Proofs Completed Day Remaining	Campaign Request
8			Associated Work
•		Deliverables	Truesoap Mother's Day Promotion
l.tr		digital ad- mother's day promo	Tags
			CAMPAIGN HOLIDAY P
۵		Wark Statua	COMMENTS ACTIVITY
0		work status	
ŗ		New Group -	Write a comment
1		Truesoap Mother's Day Promotion - Digital + Email 🗈 May 7 Completed	Ŷ



Share Associated Work Assignees

Provide your requesters with even more transparency by allowing them to view team members assigned to work items.

Once Requester Insights have been enabled, select **Edit** to the right of the feature in feature settings.

Allow requesters to see read-only information about the work being done for their requests. When enabled, requesters	Ec
will be able to see the name, start date, due date, and status of the work being completed for each request.	
D V	Now requesters to see read-only information about the work being done for their requests. When enabled, requesters will be able to see the name, start date, due date, and status of the work being completed for each request.

Toggle on Share Associated Work Members and select Save.

Allow requesters to see read-only information about the work being done for their requests. When enabled, requesters will be able to see the name, start date, due date, and status of the work being completed for each request.	Clos
Share Associated Work Members	
Allow request stakeholders to see which Team Members are assigned to the associated work.	

Requesters will be able to view Team Member avatars in the read-only view and hovering over the avatar will reveal the Team Member's name.

Work S	tatus			
	Spring	Sunflower Social Ad		۵.
	To Do	🔁 Jun 16, 2021 at 5:00 pm	<u>₽</u> 8h	Megan Di



Depending on the number of Team Members assigned to a project, requesters can select icons to view additional Team Members.

Proofs Completed	Project Members	×
Deliverships	Christy Drucker christy@truesoap.co	~
Deliverables	Grace Deng grace@truesoap.co	~
	Gwen Derby gwen@truesoap.co	~
No	Megan Diaz megan@truesoap.co	~
	Pam Martel pam.martel@truesoap.co	~
Work Status	Paul Morad paul@truesoap.co	~
Spring Sunflower Soc	al Ad	8 3 +3
To Do 🗂 Jun 16, 2021 at	5:00 pm 🛃 8h	Ľ

Share Associated Work Number

If you have Auto-Numbering (https://guide-ignite.inmotionnow.com/help/auto-numbering) enabled in your account, you can allow request stakeholders to see the auto-generated number assigned to the associated work.

Once Requester Insights have been enabled, select **Edit** to the right of the feature.



Toggle on Share Associated Work Number and click Save.



Share Associated Work Assignees	
Allow request stakeholders to see which Team Members are assigned to the associated work.	
Share Associated Work Number	
Allow request stakeholders to see the auto-generated number assigned to the associated work.	

Your requesters will now be able to see the auto-generated number.

Work S	tatus	+
0	Spring 2022 Email Blast	25 🧖 🕄 💭 🕂 🗖
	To Do 🗧 Mar 11, 2022 at 5:00 pm	_