

Request Sharing

Published on 01/27/2022

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.



Request Sharing

Allow your team to share requests with others. This feature will add a new permission and views to your account.

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**.

Settings | **Roles & Permissions** Add Role

ACCOUNT SETTINGS

- Features
- Roles & Permissions**
- Tags
- Custom Fields
- Custom Statuses
- Business Days
- Security

PERSONAL SETTINGS

- My Profile
- Notifications
- Integrations

Accept Request
Users with this permission can accept a request to provide work to Team Members.

Create Request
Users with this permission can create a work request for your team.

Decline Request
Users with this permission can decline a request and return it to the original requester.

Delete Request
Users with this permission can delete Submitted, Accepted, and Completed requests. Without this permission, users can only delete their own Draft requests.

Manage Request Sharing
Users with this permission can manage sharing a request with any other user in the account via the sharing menu or by @mentioning in request comments.

View All Requests
Users with this permission can view and modify all requests. Without this permission, users can only view and modify requests they have created or are allowed to accept.

Campaigns (0/3) -

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



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.

Requests

- My Requests
- All Requests
- Shared With Me
- Archived
- CUSTOM VIEWS
- Submitted Requests
- + Add View

Summer Scents Campaign Submitted

Request Progress

Created (Apr 19) Submitted (Apr 19) Accepted Complete (May 15)

Request Details

Due Date
May 15

Campaign Description
Multichannel campaign highlighting our summer scents in hand soap and household cleaning products

Tags
PRINT SEASONAL

Attachments *
1_B_PDF_Print_Full_ad.pdf

Print
Due Date

DETAILS

Members
+

Due Date
Due May 15

Requester Name
Christy Drucker

Request Form
Campaign Request

Tags
PRINT X SEASONAL X Add tag...

COMMENTS ACTIVITY

@g

Gavan Dezhnev (gavan@truesoap.co)

Grace Deng (grace@truesoap.co)

Megan Diaz (megan@truesoap.co)

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.

Requests

- My Requests
- All Requests
- Shared With Me
- Archived
- CUSTOM VIEWS
- Submitted Requests
- + Add View

Summer Scents Campaign Submitted

Request Progress

Created (Apr 19) Submitted (Apr 19) Accepted Complete (May 15)

Request Details

Due Date
May 15

Campaign Description
Multichannel campaign highlighting our summer scents in hand soap and household cleaning products

Tags
PRINT SEASONAL

Attachments *
1_B_PDF_Print_Full_ad.pdf

Print
Due Date

DETAILS

Members
+

Due Date
Due May 15

Requester Name
Christy Drucker

Request Form
Campaign Request

Tags
PRINT X SEASONAL X Add tag...

COMMENTS ACTIVITY

Write a comment...

Decline

Share

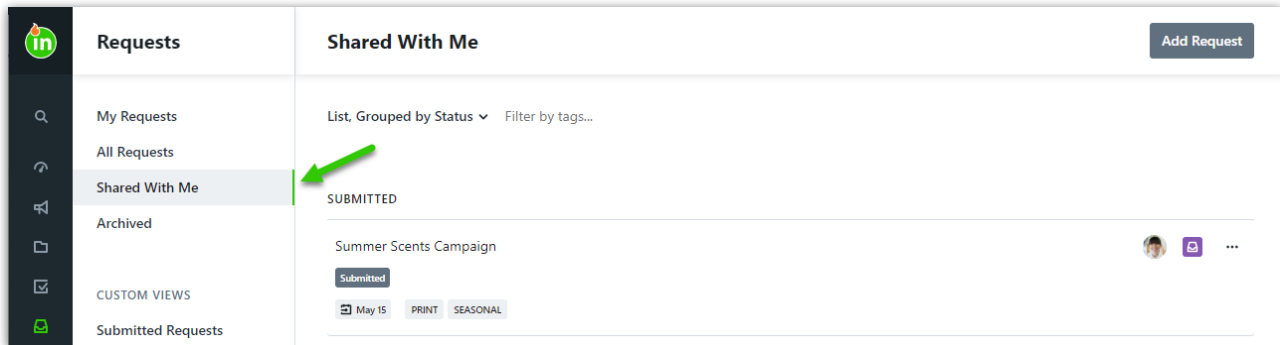
Duplicate

Archive

Delete

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.