

Editing Metadata Fields

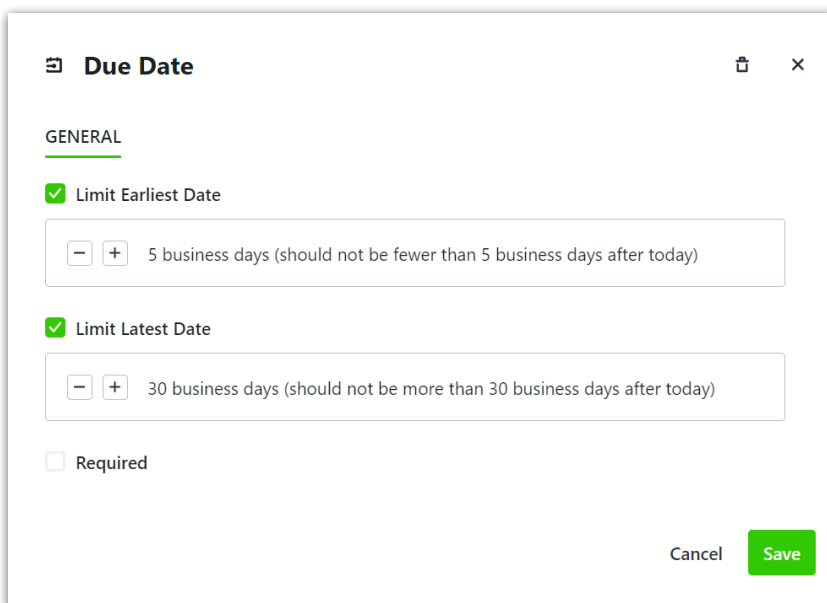
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Metadata options can only be used once per form and provide contextual information for the request, associated work, and reporting.

Due Date Field

Due Date provides an area for the requester to select a due date for the associated work. The date selected will be automatically mapped once the request is accepted

You can restrict the dates your requesters are able to select by checking **Limit Earliest Date** and/or **Limit Latest Date**. Click the plus and minus buttons to increase or decrease the number of [business days](https://guide-ignite.inmotionnow.com/help/business-days) (<https://guide-ignite.inmotionnow.com/help/business-days>) needed.



Due Date

GENERAL

☒ Limit Earliest Date

5 business days (should not be fewer than 5 business days after today)

☒ Limit Latest Date

30 business days (should not be more than 30 business days after today)

☐ Required

Cancel Save

Click **Save** when complete.

Campaigns* Field

The Campaign field provides an area in which the requester can associate the request with any open campaign.

Guide your requesters to provide the information you need by providing Helper Text. Click into the text box to type and click anywhere outside of the box when finished.

Campaigns

GENERAL

Helper Text

Which campaign is this request associated with?

Initial Value

Select Campaign

☐ Required

Cancel

Save

Set a specific campaign to be initially selected by clicking the dropdown menu below **Initial Value** and selecting a campaign. Your requester will still be able to choose a different campaign from the list of active and uncompleted campaigns.

Campaigns

GENERAL

Helper Text

Which campaign is this request associated with?

Initial Value

Select Campaign

Select Campaign

Halloween 2020

Holidays 2020

Thanksgiving 2020

Click **Save** when complete.

This is how your Campaign field will look to your requesters:

True Soap Digital Ad

FORM BUILDER

REQUEST PREVIEW

Campaigns

Halloween 2020

Holidays 2020

Thanksgiving 2020

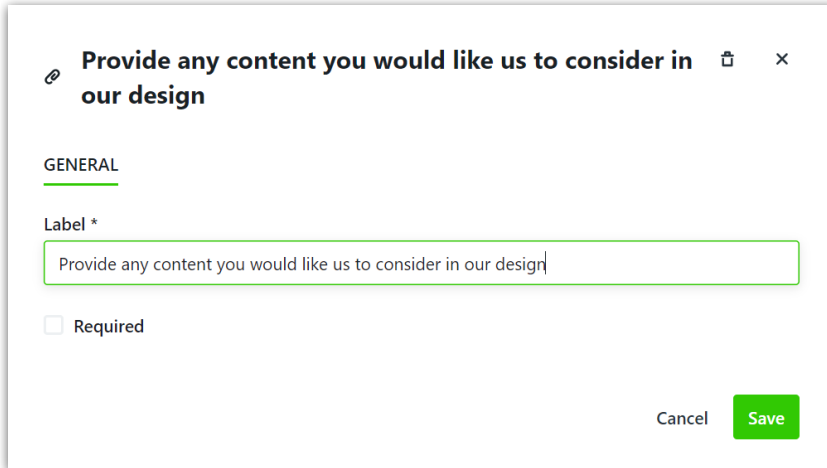
Publish Template

**Only Available for Business and Enterprise customers*

Attachments Field

The Attachment field provides an area for the requester to provide files via upload or through a direct link.

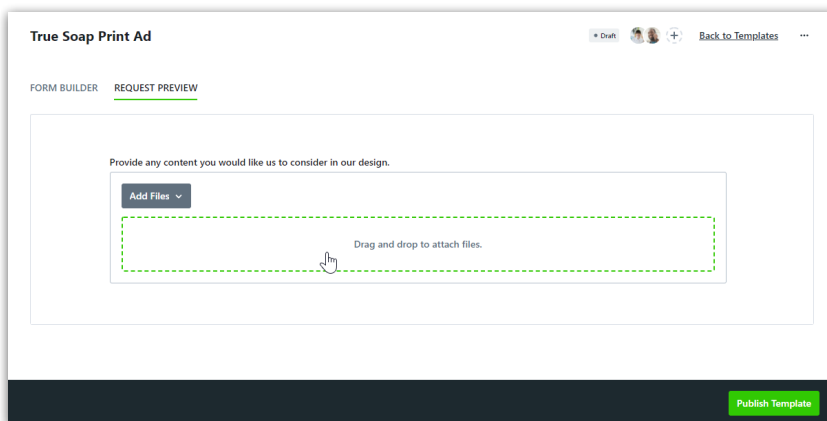
Click into the text box below **Label** to add a field name. This will be viewable to your requesters.



The screenshot shows a configuration dialog for an attachment field. At the top, there's a title bar with a lock icon, the text "Provide any content you would like us to consider in our design", and a close icon. Below the title bar, the "GENERAL" tab is selected. Under "Label *", there is a text input field containing the same text as the title. Below the input field, there is a checkbox labeled "Required" which is currently unchecked. At the bottom right, there are "Cancel" and "Save" buttons.

Click **Save** when complete.

This is how your Attachment field will look to your requesters:



The screenshot shows a form preview for "True Soap Print Ad". The form has two tabs: "FORM BUILDER" and "REQUEST PREVIEW", with "REQUEST PREVIEW" being the active tab. The main content area shows the attachment field as it appears to the requester. It includes the label "Provide any content you would like us to consider in our design." above a large dashed green box. Inside the dashed box, there is a button labeled "Add Files" with a dropdown arrow, and the text "Drag and drop to attach files." with a hand cursor icon. At the bottom right of the form, there is a "Publish Template" button.

Project Template Field

You have the ability to associate a Project Template with your requests that will be used to create the associated project.

While this field is not viewable to your requesters, you can add Helper Text for your own reference while building or editing your form.

Project Template

GENERAL

Helper Text

Which Project Template is associated with this request?

Initial Value

Select project template...

☐ Required

Cancel

Save

Select a Project Template from the dropdown menu below **Initial Value**.

Project Template

GENERAL

Helper Text

Which Project Template is associated with this request?

Initial Value

Select project template...

Select project template...

In-Store Promotion

Print

Cancel

Save

Click **Save** when complete.

Acceptors Field

Acceptors are team members who are notified when a request is submitted using a particular form and have the ability to accept or decline a request once it has been submitted. This field allows you to configure who the acceptor(s) of the request will be. This will be hidden from the requester in the form.



To add an acceptor to a form, they must have the **Accept Request** permission. This can be managed in your account settings under [Roles & Permissions](https://guide-ignite.inmotionnow.com/help/managing-roles-and-permissions) (<https://guide-ignite.inmotionnow.com/help/managing-roles-and-permissions>).

Click the plus button under **Default Value** to add acceptors.



Acceptors

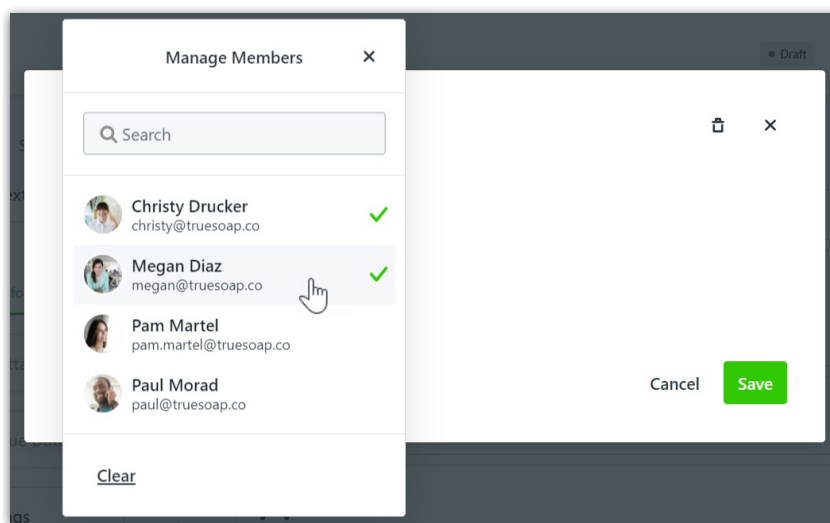
GENERAL

Default Value

+ (hand cursor)

Cancel Save

Click on the users name(s) to add them as acceptors. A check mark will appear next to their name to indicate they have been added.



Manage Members

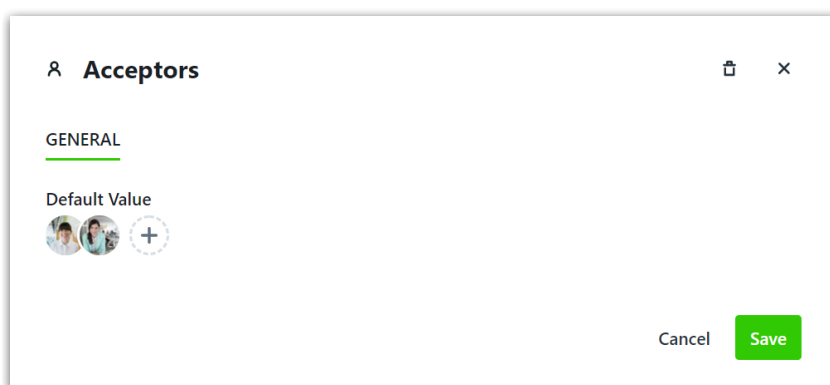
Search

	Christy Drucker christy@truesoap.co	✓
	Megan Diaz megan@truesoap.co	✓
	Pam Martel pam.martel@truesoap.co	
	Paul Morad paul@truesoap.co	

Clear

Cancel Save

Click anywhere outside of the **Manage Members** box to update your selection.



Acceptors

GENERAL

Default Value

+

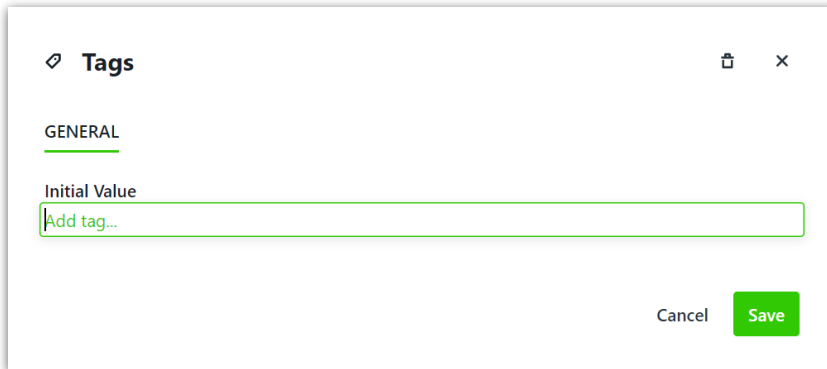
Cancel Save

Click **Save** when complete.

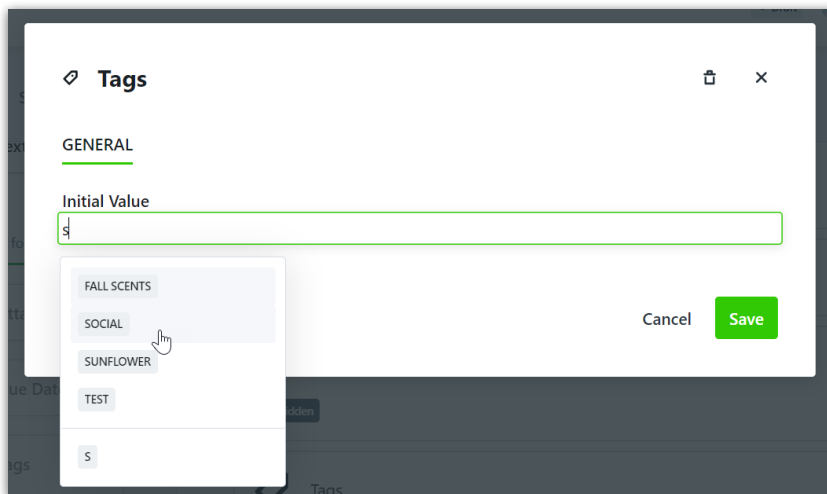
Tags Field

Configure tags that will be automatically added to the request and associated work. This will be hidden from your requesters in the form.

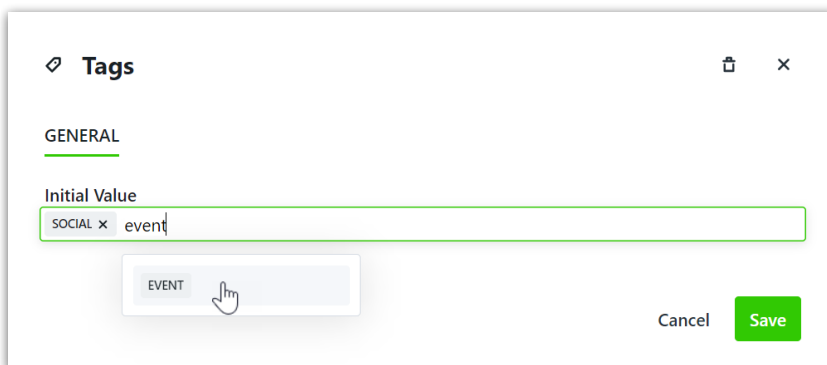
Click into the text box below **Initial Value** to add tags to your request form.



As you begin typing, tags already added in your account will be available for selection.



You also have the option to create a new tag. Enter a name for your tag and select the newly created tag.



Click **Save** when complete.