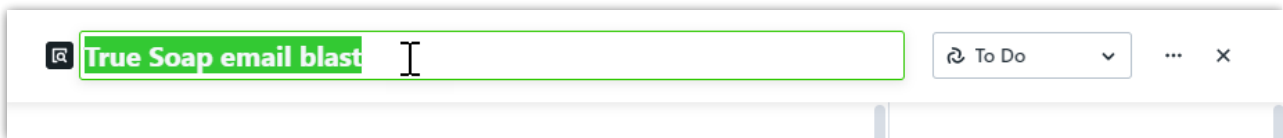# Editing Proof Details

Published on 05/18/2023

Proof Name

Once a proof is created, you can update its name at any time. Hover over the name and click into the text box to edit. Click outside of the text box to automatically save your changes.
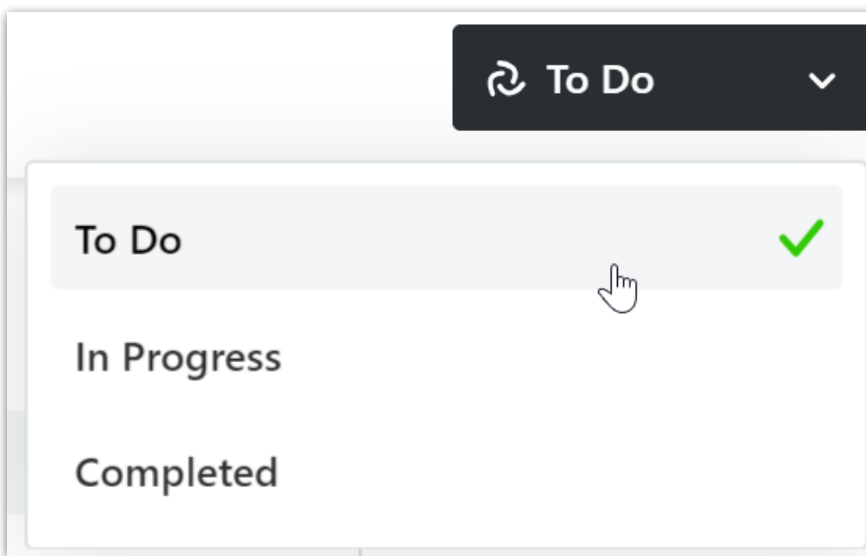

Proof Status

Any new proof will have the status of **To Do.** To make changes to the **Proof Status**, click on the status menu to the far right of the Proof Name. This will always reflect the current status of the proof.
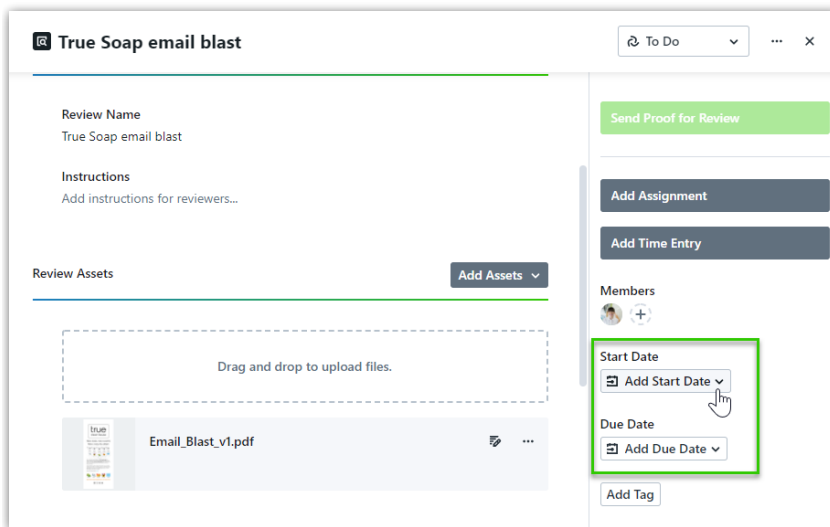
Potential proof statuses are:

- **To Do** - Proof work is not yet started.
- **In Progress** - Proof work is active and underway.
- **In Review** - Proof is currently in review by essential reviewers.
- **Returned** - Proof has been reviewed and returned with an approval status.
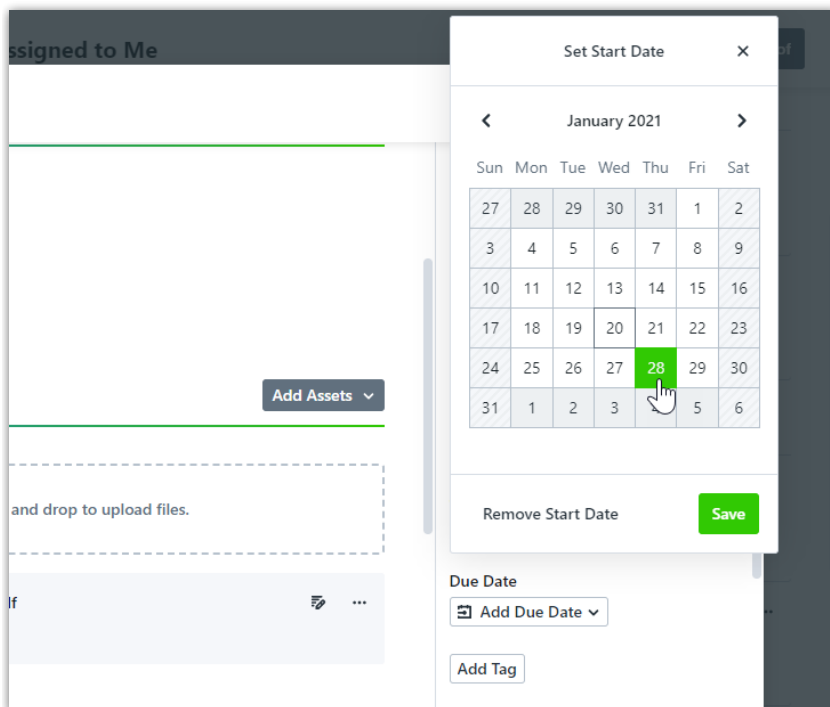- **Completed** - Proof work was finished.

> The proof status cannot be manually updated while the proof is **In Review**. In order to change the status of a proof that is in review, it will need to be **Canceled** or **Returned**.

Start and Due Dates

The Start and Due Dates define the time in which the associated work should be completed. To set these dates, navigate to the right side of the proof under **Members**.


Select **Add Start Date** or **Add Due Date** to select a date. Click **Save** when complete.

Once a date is set, you can click the updated calendar to change the date or remove the due date altogether.

Reordering Review Assets

Drag and drop functionality allows you to reorder your assets prior to sending out for review. Hover over a review asset to reveal the mouse grabber and drag to the desired location.
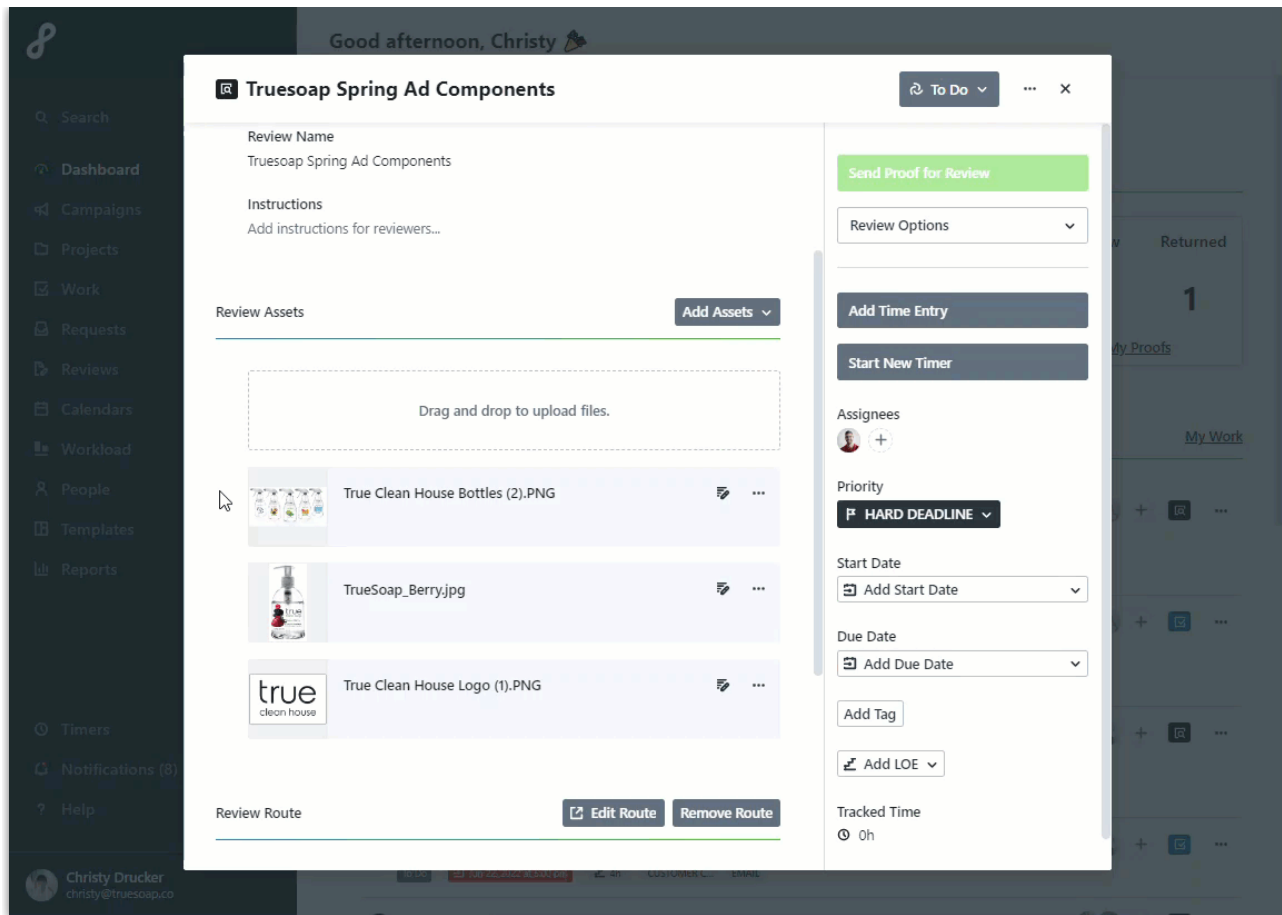
Review Deadline

The **Review Deadline** defines the date and time that your reviewers need to complete their review. The proof will be returned at the time and day selected, even if there are reviewers who have not completed their review. Reviewers will receive notification of this deadline in their initial invitation and will be notified of any updates once they've been invited to the review.

> ℹ️ If your proof has multiple tiers of reviewers, you have the ability to set time constraints per tier within the review route.

To Set a **Review Deadline**, scroll towards the bottom of your proof below **Review Route** and select **Add Review Deadline**.
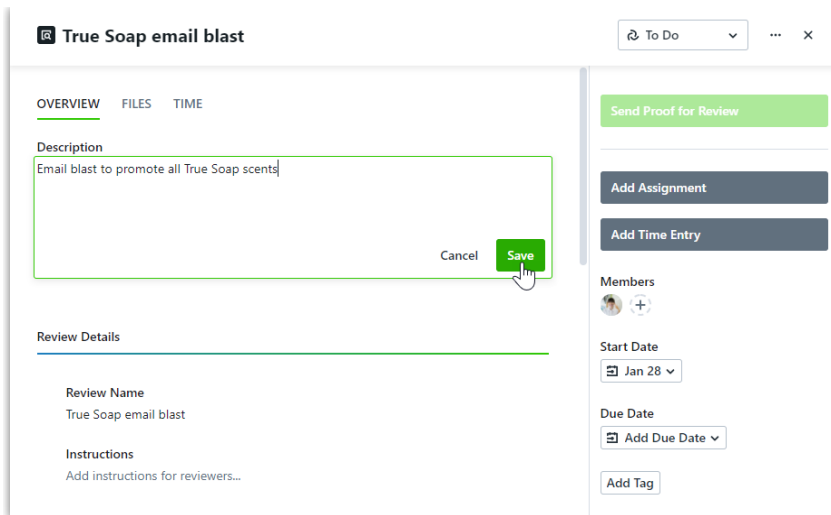
Select a date and time and click **Save** when complete.

Once a date is set, you can click the updated calendar to change the date or remove the deadline altogether.

Proof Description

Enter a description to provide your team with valuable context and details. The proof description is not seen by reviewers.
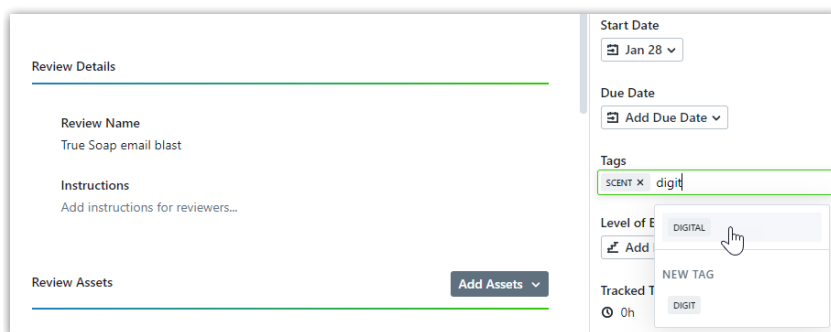
From the **Overview** tab, click on **'Add Description...'**. Enter a relevant description of the proof, and click **Save** when complete.

Tags

Tags are system-wide fields that can help organize and filter project, task, and proof data.

On the right side of your proof under **Due Date**, click **Add Tag** to assign a new or existing tag to the proof. Once you begin typing, the system will search for and display any existing tag with matching characters. You can click to select the appropriate tag when available, or continue typing to create a new tag. Click the tag you would like to create, or **press return** when finished typing.


Select the **x** next to the tag to remove.

Proof Assignees

Unless a Team Member has permission to view all proofs, they will not be able to view or edit a proof until they are assigned to it.

To assign proof members, click the plus icon below **Assignees** in right-hand side of your proof modal. Click to select the members you would like to assign to the proof. A green checkmark will display on the right side of each member selected.
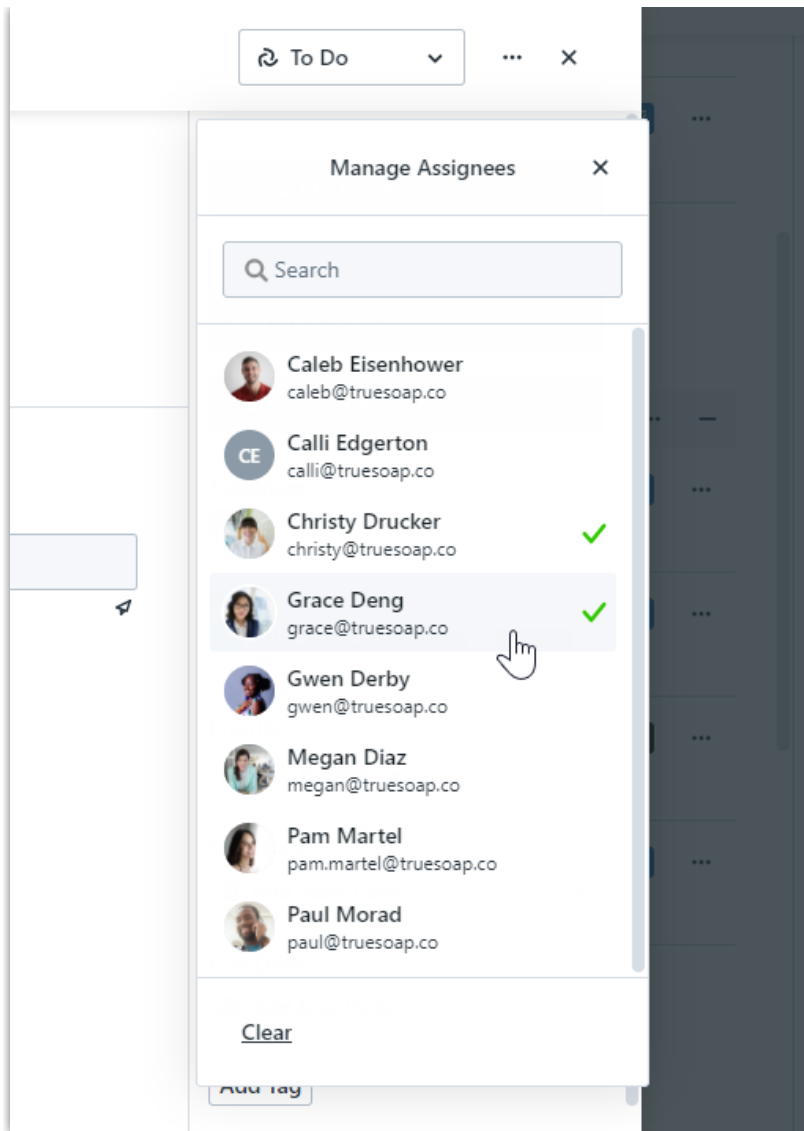
If you have Specialties* assigned to your project they will show above people and can be selected, showing a green checkmark.
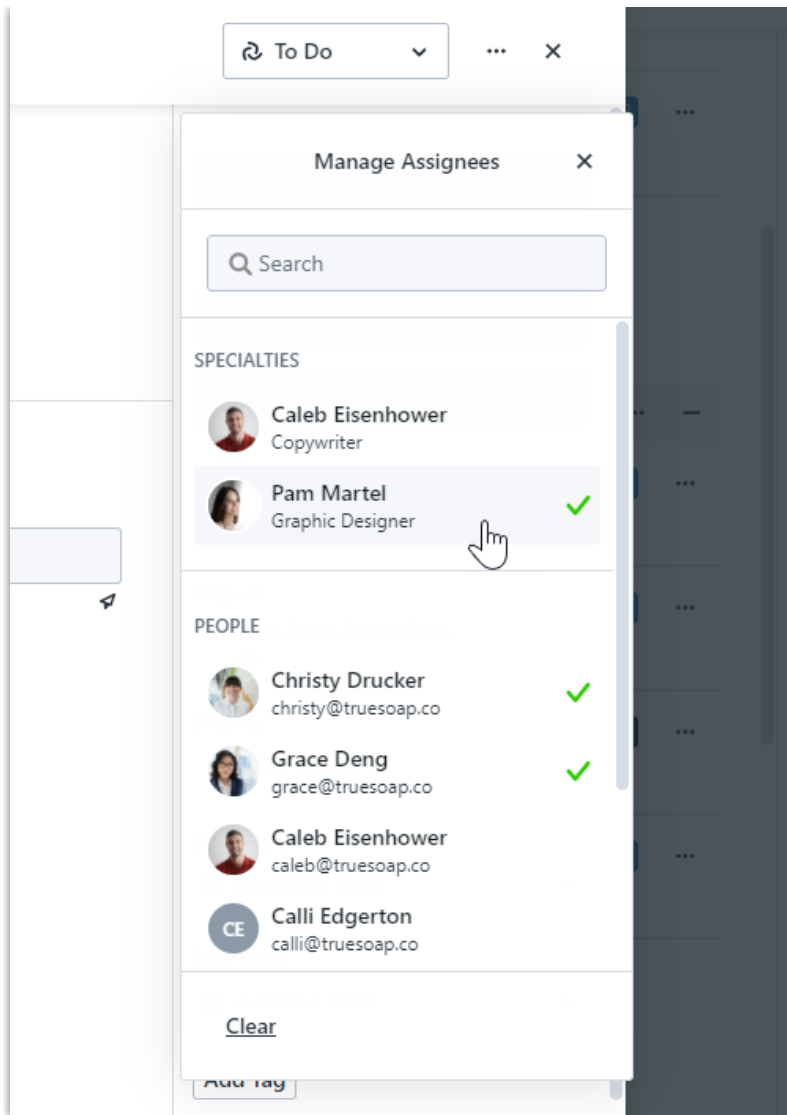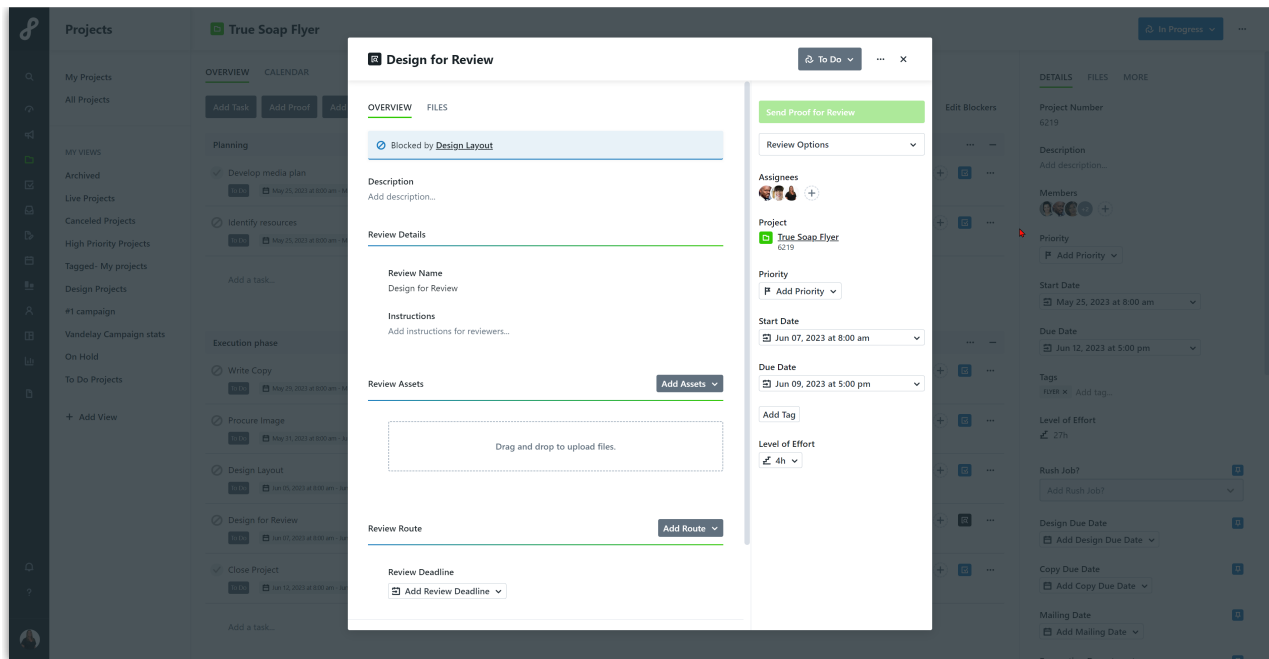
Available only to Business & Enterprise Customers

Proofs can be assigned to multiple team members.

> ℹ️ Example: If it's a design proof, it may be assigned to the designer. If it's a copy proof it may be assigned to a copywriter. A project manager may also be assigned to a proof along with either the copywriter or the designer.
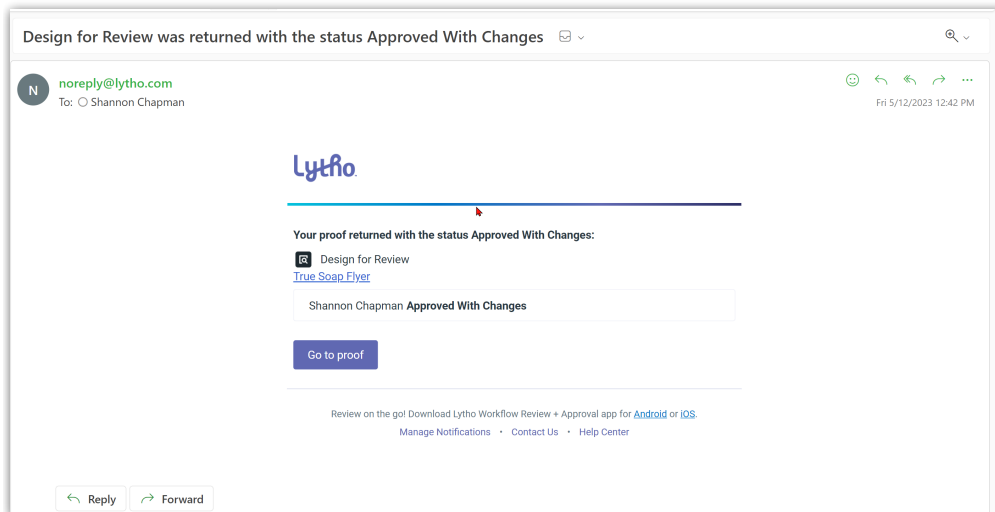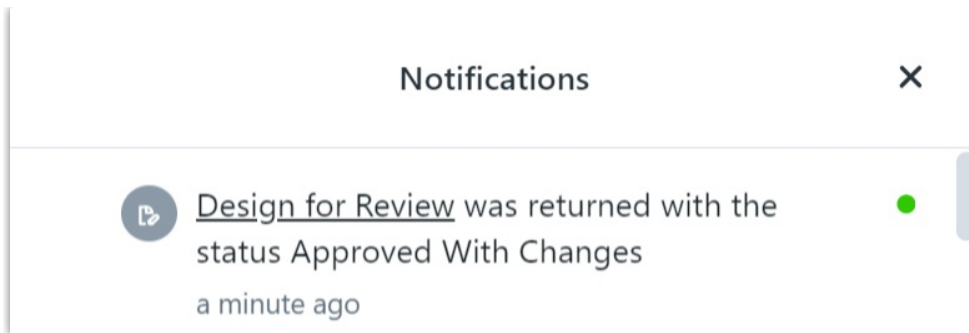
ⓘ ONLY the team members assigned to the proof will receive notifications when a reviewer has submitted their review status.
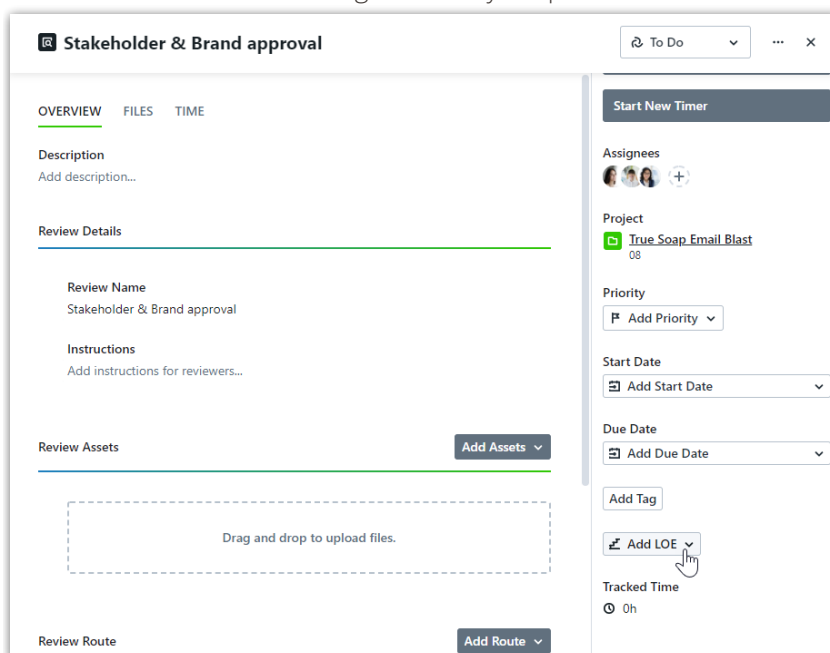

Depending on your notification settings you may receive a notification in app or via email letting you know that a reviewer has submitted their review status.
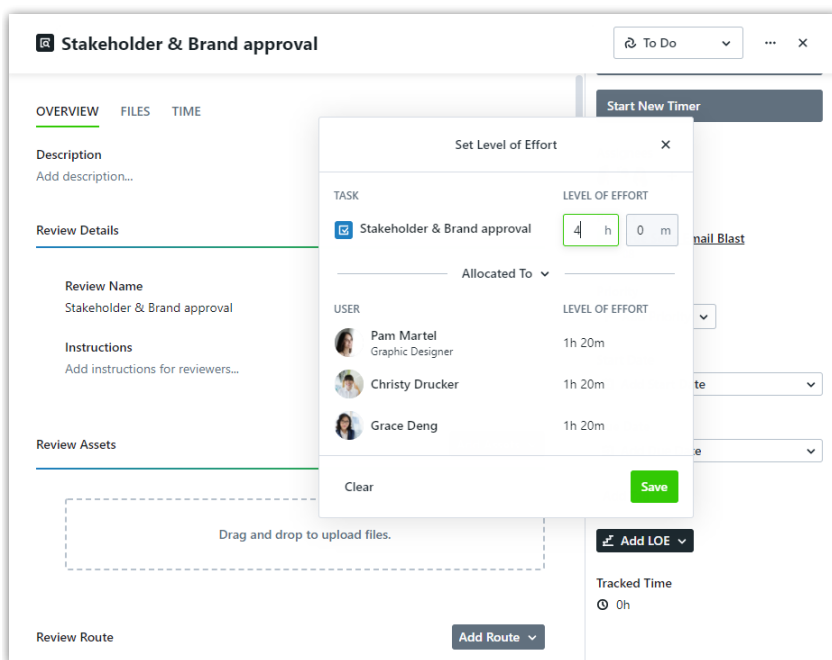
Adding Level of Effort

Towards the bottom of the right side of your proof modal select **Add LOE.**

Input the number of hours and/or minutes below **LEVEL OF EFFORT**. If you have users assigned to your proof, the hours will automatically be evenly distributed.

You can create a customized distribution of how the hours are allocated by clicking **Allocated To** and selecting **Totals To** from the dropdown menu.

Input the number of hours and/or minutes for each user below **LEVEL OF EFFORT**. These numbers will automatically update the overall level of effort. Select **Save** when complete.

Set Level of Effort ✕

USER		LEVEL OF EFFORT			
Pam Martel	Graphic Designer	2	h	0	m
Christy Drucker		0	h	20	m
Grace Deng		1	h	40	m

Totals To ⌄

TASK	LEVEL OF EFFORT
☑ Stakeholder & Brand approval	4h 0m

Clear **Save**

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