

# **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.

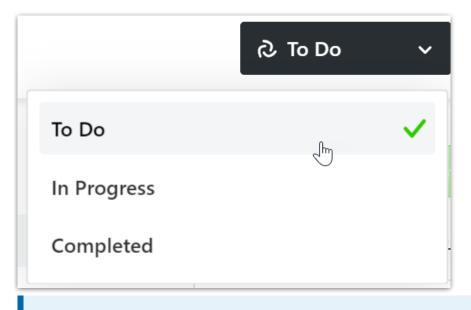
Image: Comparison of the second s	∂ To Do	~	 ×

#### **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**.

ब True Soap email blast	د To Do م س ۲۰۰۰ ×
Review Name True Soap email blast	Send Proof for Review
Instructions Add instructions for reviewers	Add Assignment
eview Assets	Add Assets  Members
Drag and drop to upload files.	Start Date
Email_Blast_vt.pdf	Image: Second secon

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

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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.



8	Good afternoon, Christy 🅭	
	Truesoap Spring Ad Components	
Q. Search	Review Name	
🐵 Dashboard	Truesoap Spring Ad Components	Send Proof for Review
📢 Campaigns	Instructions Add instructions for reviewers	Review Options
Di Projects		Neturned
🖾 Work	Review Assets Add Assets V	Add Time Entry
B Reviews		Start New Timer
🗄 Calendars	Drag and drop to upload files.	Assignees
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G Notifications (8)		zr Add LOE ↓
? Help	Review Route [] Edit Route Remove Route	Tracked Time
		• 0h + 6
Christy Drucker christy@truesoap.co	END ENDOWNED 2.0 CLAUDERC ENVE	

### **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.

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**.



True Soap email blast	👌 To Do 🗸 🗸 🗸
Email_Blast_v1.pdf	Send Proof for Review
Review Route	Add Assignment Add Route v
Review Deadline	Members (1) Start Date (2) Jan 28 V
COMMENTS ACTIVITY	Due Date

Select a date and time and click**Save** when complete.

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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.



True Soap email blast	
OVERVIEW FILES TIME	Send Proof for Review
Description	
Email blast to promote all True Soap scents	Add Assignment
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	19 (E)
Review Details	Start Date
	□ Jan 28 ∨
Review Name	E Jan 20 V
True Soap email blast	Due Date
nae boop erran brose	Add Due Date V
Instructions	E Add Dde Date V
Add instructions for reviewers	Add Tag

#### 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.

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	Due Date
Review Name	🖹 Add Due Date 🗸
True Soap email blast	
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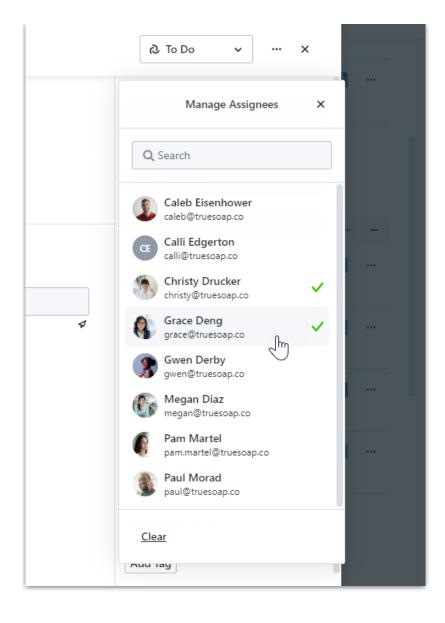
Select the **x** next to the tag to remove.

### **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.

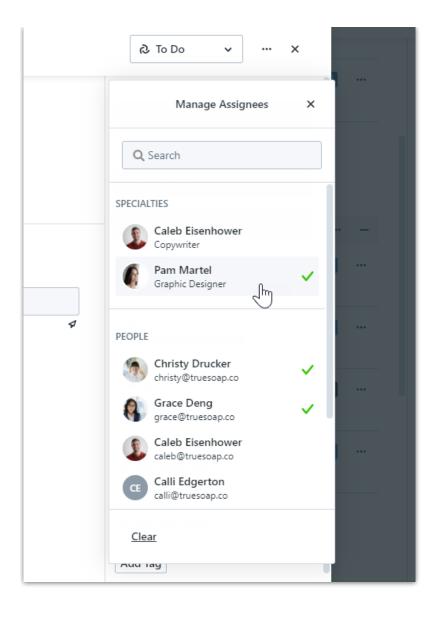
To assign proof members, click the plus icon below **Assignees** in right-hand side of your proof modal. Click to select the members you would like to assign to the proof. A green checkmark will display on the right side of each member selected.





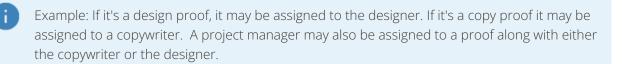
If you have Specialties\* assigned to your project they will show above people and can be selected, showing a green checkmark.





#### \*Available only to Business & Enterprise Customers

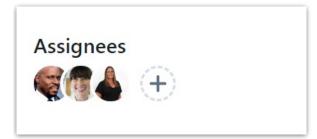
Proofs can be assigned to multiple team members.





8	Projects	True Soap Flyer				ැටි. In Progress 🗸 🚥
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ы 0 А		Planning Develop media plan Toro Moy 25, 2021 at 600 am + M	Blocked by <u>Design Layout</u> Description Add description.	Review Options  V Assignees		Description Add description_ Members
		✓ Identify resources Toto May 25, 2023 at 800 am - May 25, 2	Review Details	Project True Soap Flyer C 19 Priority	÷ 🗉 … 🖡	Priority P Add Priority v
	Design Projects #1 campaign Vandelay Campaign stats On Hold	Execution phase	Design for Review Instructions Add instructions for reviewers	# Add Priority v       Start Date       🗑 Jun 07, 2023 at 8:00 am		Start Date
ß	To Do Projects + Add View	Write Copy Table May 29, 2023 at 800 am - 6/	Review Assets Add Assets ~	Due Date T Jun 09, 2023 at 5:00 pm Add Tag	+ • • •	Tags rom x   Add tag Level of Effort ≰ 27h
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		Design for Review	Review Route  Add Route		+ • •	Design Due Date   Add Design Due Date
ф ?		Close Project	Review Deadline		+ • •	Copy Due Date   Add Copy Due Date   Mailing Date
8		Add a task				Add Mailing Date V

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.



	Notifications	×
P	<u>Design for Review</u> was returned with the status Approved With Changes a minute ago	•

noreply@lytho.com To: ○ Shannon Chapman		○ ← ≪ → · Fri 5/12/2023 12:42 P
	Lytho.	
	Your proof returned with the status Approved With Changes:	
	Design for Review <u>True Soap Flyer</u>	
	Shannon Chapman Approved With Changes	
	Go to proof	
	Review on the gol Download Lytho Workflow Review + Approval app for <u>Android</u> or IOS. Manage Notifications • Contact Us • Help Center	

## Adding Level of Effort

Towards the bottom of the right side of your proof modal selectAdd LOE.

🛽 Stakeholder & Brand approval	No Do ✓ ··· ×
OVERVIEW FILES TIME	Start New Timer
Description Add description	Assignees
Review Details	Project True Soap Email Blast 08
Review Name Stakeholder & Brand approval	Priority       Priority       Priority ~
Instructions Add instructions for reviewers	Start Date
Review Assets Add Assets V	Due Date
Drag and drop to upload files.	Add Tag
Review Route Add Route V	



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.

Stakeholder & Brand approval		رگ To Do 🗸 ···· >				
OVERVIEW FILES TIME	Start New Timer					
Description	Set Level of I	Effort ×				
Add description	TASK	LEVEL OF EFFORT				
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Stakeholder & Brand approval	USER	LEVEL OF EFFORT				
Instructions	Pam Martel Graphic Designer	1h 20m				
Add instructions for reviewers	Christy Drucker	1h 20m te				
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Review Route	Add Route					

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

Set Level of Effort	×			
TASK	LEVEL OF EFFORT			
Stakeholder & Brand approval	4 h 0 m			
Allocated To 🗸	 ח			
USER Allocated To	1h 20m 1h 20m			
Gra Totals To				
Christy Drucker				
Grace Deng	1h 20m			
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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 Effor	t		×	
USER		LEVEL OF EFFORT			
Pam Martel Graphic Designer		2	h	0 m	
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TASK		LEVEL OF EFFORT			
Stakeholder & Brand approval 4h 0m					
Clear				Save	

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