

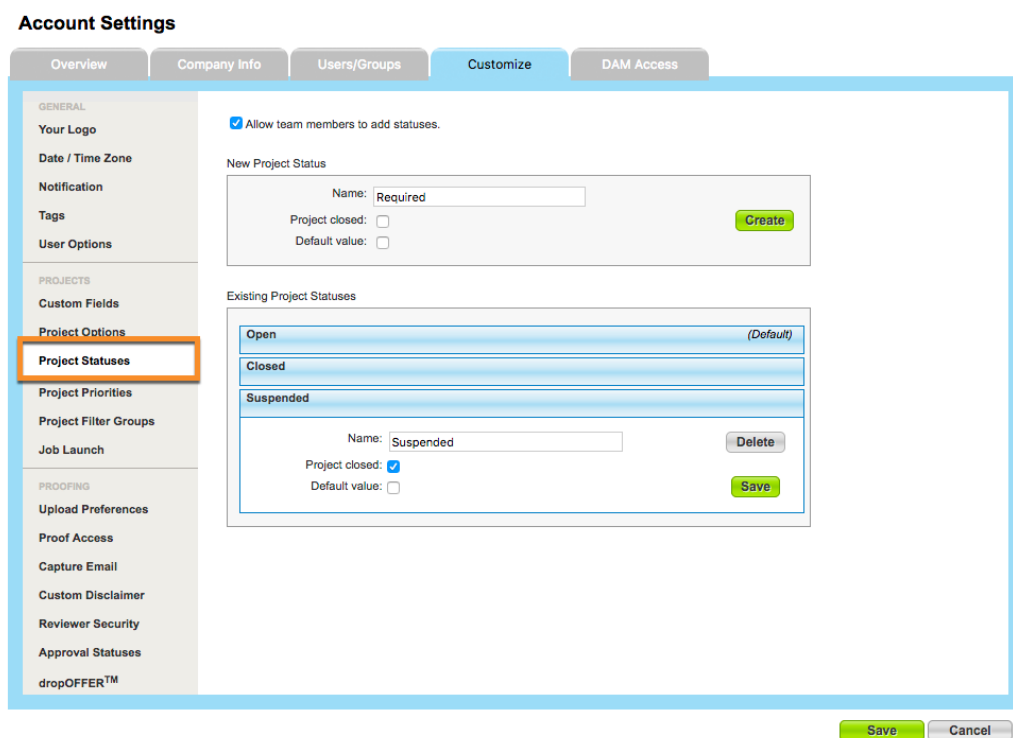
Customizing Project Status and Priority

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Customizing Project Status

In Account Settings, you can add or edit the available project statuses for your account. It is a good practice to match the custom statuses with your own stages of project progression that you want to provide to requesters when they request project updates. Project Status can also be a valuable field for reporting.

1. To customize your status list, navigate to **Account > Account Settings > Customize > Project Statuses**.



2. From this screen you can add new project statuses, or edit existing. To edit, simply click on the status you would like to change, update the name and click **Save**.
3. You can also change which status is the **default status** assigned to all new

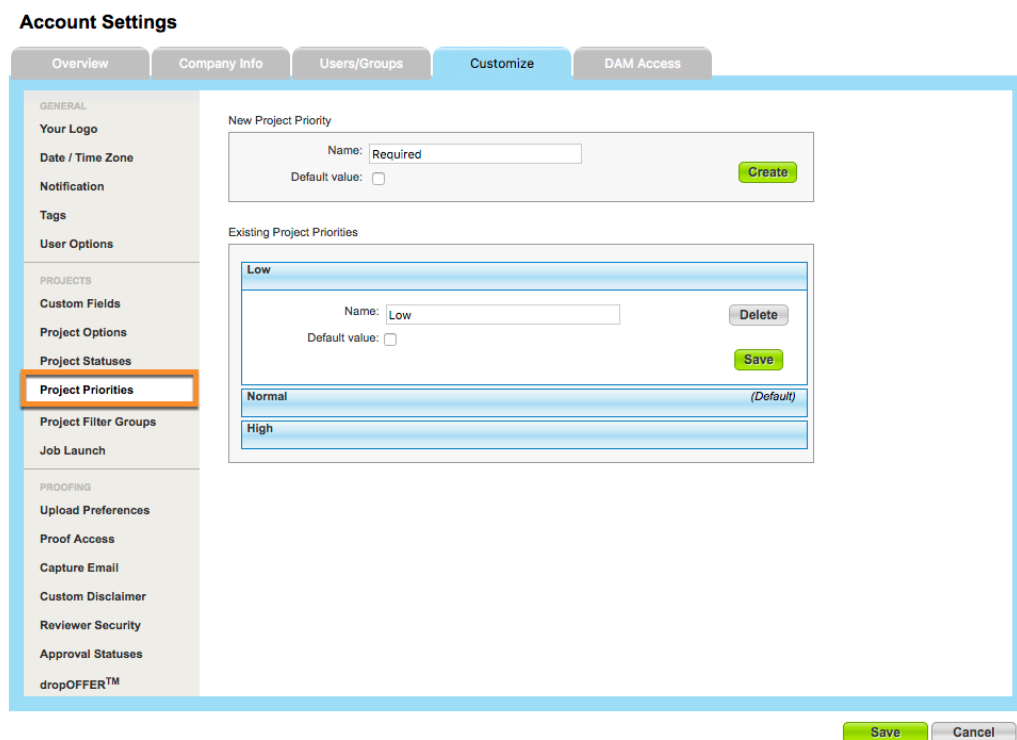
projects as well as the **Project closed** status.

4. If you would like to be able to sort projects by status in a sequential order instead of alphabetically, be sure to add a numeric value at the beginning of the status name, i.e. 1 - Started, 2 - In Progress, 3 - Pending Approval, etc.

Customizing Project Priority

In Account Settings, you can also add or edit the available project priorities for your account. This allows you to customize the system to your own method of prioritization. Project Priority can also be a valuable field for reporting.

1. To customize your priorities list, navigate to **Account > Account Settings > Customize > Project Priorities**.



The screenshot shows the 'Account Settings' interface with the 'Customize' tab selected. The left sidebar lists various settings categories: GENERAL (Your Logo, Date / Time Zone, Notification, Tags, User Options), PROJECTS (Custom Fields, Project Options, Project Statuses, **Project Priorities**, Project Filter Groups, Job Launch), and PROOFING (Upload Preferences, Proof Access, Capture Email, Custom Disclaimer, Reviewer Security, Approval Statuses, dropOFFER™). The 'Project Priorities' option is highlighted with an orange box.

The main content area is titled 'New Project Priority' and contains a form with a 'Name' field (containing 'Required'), a 'Default value' checkbox, and a 'Create' button. Below this is the 'Existing Project Priorities' section, which displays a list of priorities: 'Low', 'Normal' (marked as '(Default)'), and 'High'. Each priority has a 'Name' field, a 'Default value' checkbox, and a 'Delete' button. A 'Save' button is located at the bottom right of the 'Existing Project Priorities' section.

2. From this screen you can add new project priorities, or edit existing. To edit, simply click on the status you would like to change, update the name and click **Save**.
3. You can also change which status is the **default priority** assigned to all new



projects.

4. If you would like to be able to sort projects by priority in a sequential order instead of alphabetically, be sure to add a numeric value at the beginning of the priority name, i.e. 1 - Low, 2 - Medium, 3 - High, etc.