

Utilizing Vendors to Upload Content for Review

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What is a Vendor?

Vendors are a type of user that can upload proofs, upload new versions of proofs, and view feedback on proofs they've uploaded. Vendors cannot route proofs, edit proof information, or access any request or project details.



Vendors are intended to be used for outside freelancers, contractors, or agency partners who need to provide completed content to the team. The Vendor role allows you to provide a consistent experience for your reviewers regardless of who creates the content.

Adding a New Vendor

inMotion account administrators can add Vendors in the same way they would add any other user by navigating to Account Settings.

1. Navigate to **Account > Account Settings > Users/Groups**.
2. Click **New User** in the top right of the settings window.
3. Enter the new user's name, email address, username, and password.
4. Select 'Vendor' in the User Type section. *Note: If this option is not available, [contact support](http://guide.inmotionnow.com/help/contact-feedback) (<http://guide.inmotionnow.com/help/contact-feedback>) to have this user role enabled.*
5. In order for a vendor to upload content, you must assign them to at least one [Proof Template](http://guide.inmotionnow.com/help/proof-templates) (<http://guide.inmotionnow.com/help/proof-templates>) .
6. Click **Save**.

My Account

Close

Overview

Company Info

Users/Groups

Customize

Storage Options

Edit Existing User

Resend Credentials

Delete User

Edit user information in the fields below then select save.

Name: Vincent Dubois

Title: Designer

Email: vincent@topagency.com

User Name: vincent_dubois

Additional Return Notification Recipients:

These emails will receive notifications when your Reviews are completed. Separate email addresses with a comma (email@home.com,email2@home2.com)

RESET PASSWORD

Password:

(Password criteria: should be at least 5 characters)

Re-type Password:

USER TYPE

☐ Admin
Full access to all features of the application including global administrator features. (Admin access should be limited to only key personnel)
 ☐ Staff
Provides access to upload, sort, search and edit proof details as well as manage contacts and view reports. (Most common User Type)
 ☐ CSR
Similar access as the Staff User Type but upload capabilities have been removed. (Recommended for sales and customer service users)
 ☒ Vendor
Provides streamline upload access. (inVite feature)

PERMISSIONS

☒ Task Resource
Allow this user to be assigned to tasks.
 ☒ Project Schedule Manager
Allow this user to create/make changes to a project schedule.

PROOF TEMPLATE ACCESS


☒ Creative Team Review
 ☐ Internal, Executive and Client Review

PROOFS DASHBOARD

☒ Create vendor dashboard for upload and consolidate view of proofs they post.

Save

Cancel




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Uploading Content as a Vendor


1. Login to the vendor account.
2. Click the **POST CONTENT FOR REVIEW** button in the top right of the screen to load files into the proof.
3. After adding the asset files, assign a Proof Template, provide a proof name and provide notes to the reviewers when necessary.

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- ## Viewing Feedback and +Versioning



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My Proofs Dashboard

POST CONTENT FOR REVIEW

Status	Image	Project Name	Proof Name	Access Code	Date Posted ▾	Available Actions ⓘ
<div>Returned Actions Needed</div>		Unassigned	True Soap Logo	9F48A4	1/15/2018 1:08 PM	<div>PREVIEW</div> <div>+VERSION</div> <div>REVIEWS</div>

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GO

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CHANGE

