Self-Paced Guide: Account Customization

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Complete the following tasks to setup and customize core aspects and settings for your inMotion account. Utilize the referenced knowledge base articles to learn more about the corresponding features.

Setting up Users and Contacts

1. Manage Users (http://guide.inmotionnow.com/help/user-management) or send login credentials when applicable.

    - Users are paid licenses and should reflect your core team: Admins, Staff Users, CSRs, and/or Vendors.

    - If they also need to review work, manage Job Launch requests (http://guide.inmotionnow.com/help/assign-jl-managers) or submit Job Launch requests (http://guide.inmotionnow.com/help/assign-jl-submitters) , give them the applicable permissions and Job Launch form access in their user record.

2. Setup User Tags. (http://guide.inmotionnow.com/help/user-tags)

3. Add Contacts (http://guide.inmotionnow.com/help/contactmanagement) or send login credentials when applicable.

    - Contacts are internal/external clients requesting and reviewing work.

    - If applicable, allow for additional permissions in their Contact record.

    - Add any Users as Contacts (http://guide.inmotionnow.com/help/adding-user-as-contact) that also need to be involved in the review process.

Create Review Teams & Workflows

1. Create groups of Contacts called Review Teams (http://guide.inmotionnow.com/help/review-teams) to route proofs.

2. Create groups of Contacts separated by rules called Workflows.

Customize Job Launch Settings

1. Allow requesters to to see project and status updates on their own dashboard, by enabling Requester Insights. (http://guide.inmotionnow.com/help/requester-insights)

2. Allow requesters to attach files (http://guide.inmotionnow.com/help/jl-attachments) to their job launch requests.

3. Allow requesters to edit their job launch requests (http://guide.inmotionnow.com/help/jl-edits-enable) after submission.

4. Allow Request Duplication (http://guide.inmotionnow.com/help/duplicate-jl-request) .

5. Customize Job Launch language. (http://guide.inmotionnow.com/help/customize-jl-name)

Customize Project Settings

1. Create Project Templates (http://guide.inmotionnow.com/help/project-templates) to automate project details, schedules, and team members.

2. Create custom fields (http://guide.inmotionnow.com/help/custom-fields) for your projects. *Note: Custom fields are reportable data points that can be customized to your organization. Examples include business areas, categories, brands, etc.*

3. Create Project Filter Groups (http://guide.inmotionnow.com/help/project-filter-groups) for your projects. *Note: Project Groups associate projects together under one umbrella, and are reportable.*

4. Customize Project Statuses and Priorities. (http://guide.inmotionnow.com/help/customize-project-status-priority)

Customize Proof Settings

1. Create Proof Templates (http://guide.inmotionnow.com/help/proof-templates) to automate the routing of proofs by creating Proof Templates that preselect items like Reviewers and Release Options.

- *Example: Someone uploads a video file for review. They know that video asset reviews will always need to be reviewed by the same team with the same release options, so they select a Video Proof Template to automate the process.*

2. Customize your default Approval Statuses (http://guide.inmotionnow.com/help/customizing-proof-approval-statuses) .

3. Customize your Upload Preferences. (http://guide.inmotionnow.com/help/customize-proof-upload)

Advanced Settings

1. Create User Groups (http://guide.inmotionnow.com/help/usergroups) .

   - User Groups allow you to restrict access to proofs. Once you create a user group and assign it to a proof accordingly, only the members of the applied user group can view that proof in the Proofs Workspace. This feature is helpful when you have multiple departments in the same account (e.g. Digital, Print, Web) and you don't want one group's work cluttering the workspace for other users.

2. Create Contact Groups. (http://guide.inmotionnow.com/help/contact-filter-groups)

   - You can create groups of Contacts to make selecting reviewers easier when routing proofs. *Example: A user uploads a proof for review. They know that someone in Marketing needs to review the proof, so they filter the reviewers to only view those in the Marketing Contact Group to expedite their reviewer selections.*

3. Review each section in the **Customize** tab of **Account Settings** to familiarize yourself with the various account configuration options available. You can also explore our Administration (http://guide.inmotionnow.com/help/administration) knowledge base articles.

Advanced Customization Available

> ℹ️ **Contact your Customer Success representative to learn more or to enable the following features.**

1. Mapping Request Fields to Custom Project Fields
   - If fields on your Job Launch form match your custom fields, inMotion can map them so you do not need to enter that information manually when approving requests.

2. Request Scoring
   - Job Launch requests can be scored by applying different weights to answers of questions on the form. This can help with prioritization of incoming requests.

3. Project Naming Automation
   - inMotion can use a variety of data points to automate the project naming convention you use in your inMotion account, including custom fields.

Choose any combination of custom fields to use as your project names.

Next Steps!

Repeat all steps as many times as necessary to gain familiarity with the basics of inMotion! Keep a consolidated document with all questions to review with your Customer Success representative.

Email your Customer Success representative to schedule the Account Customization Call. When you schedule check-in calls with us, we commit to having enough time available to serve you. That affects how many other customers we can serve that day. For that reason, if you need to adjust the time or reschedule the call, please let us know 24 hours in advance.