



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.
2. **Add Contacts** (<http://guide.inmotionnow.com/help/contactmanagement>) or send login credentials when applicable.
 - Contacts are internal/external clients 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**.
(<http://guide.inmotionnow.com/help/workflows>)

Customize Proof Settings

1. Create **Proof Groups** (<http://guide.inmotionnow.com/help/proof-groups>) . Proof groups help organize your workspace and allow you to see a filtered view when selected.



2. Create [Proof Templates](http://guide.inmotionnow.com/help/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.*
3. Customize your default [Approval Statuses](http://guide.inmotionnow.com/help/customizing-proof-approval-statuses) (<http://guide.inmotionnow.com/help/customizing-proof-approval-statuses>) .
4. Customize your [Upload Preferences](http://guide.inmotionnow.com/help/customize-proof-upload). (<http://guide.inmotionnow.com/help/customize-proof-upload>)

Advanced Settings

1. Create [User Groups](http://guide.inmotionnow.com/help/usergroups) (<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). (<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) (<http://guide.inmotionnow.com/help/administration>) knowledge base



articles.

Account Settings

Overview Company Info Users/Groups **Customize** DAM Access

GENERAL

Your Logo

Date / Time Zone

Notification

Tags

User Options

PROOFING

Upload Preferences

Proof Access

Proof Groups

Capture Email

Custom Disclaimer

Reviewer Security

Approval Statuses

dropOFFER™

Settings selected below will be your default upload settings. These settings are editable on a project by project basis at the time of upload by accessing the advanced upload tab.

☒ Versioning

☐ Reviewer Forwarding

☐ Keep Original File Names

☐ Allow Asset Download

☒ Allow Asset Printing

☒ Include Help Instructions

☐ Custom ☒ System

UPLOAD STATUS

☒ Out for Review

☐ On Hold

"Previous Reviewer" Settings:

☒ Show All

☐ Hide All

Save **Cancel**

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.