Using Custom Fields In Your Workflow

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If this is a data point that needs to be selectable and reported on for projects and/or campaigns...

Where, in your process, does this information need to be provided?

This information needs to be provided by the requester

Add to your request form

- Include the custom field in your request form.
- Make field required to ensure a value is always entered.
- If the field is for both projects and campaigns, use cascading custom fields to push required answers into multiple deliverables when accepting a campaign request.

This information needs to be provided at the start of the project or campaign

Add to your request acceptance process

- Check "required for" campaigns and/or projects in Account Settings > Custom Fields.

This information needs to be provided during or at the end of a project or campaign

Add to your project and/or campaign details

- Pin inside of project templates for visibility.

Reporting Nirvana

Leverage custom fields in your reports on:

Projects	Tasks
Campaigns	Reviews
All Work	Time
Proofs	