LYTHO WORKFLOW GUIDE

Using Custom Fields in Your Workflow

Capture the right data at the right moment, then report on it everywhere.

1 CREATE THE FIELD

Does your team need to select and report on this data point for Campaigns, Projects, Tasks, or Proofs?

Create it on the matching tab in **Account Settings › Custom Fields**

Campaigns & Projects | Tasks | Proofs

2 DECIDE WHEN IT'S CAPTURED

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

A — AT INTAKE

Provided by the Requester

Add it to your Request Form

- Include the Custom Field in your Request Form.
- Make the field required so a value is always entered.
- Accept the Request as the same type of work as the Custom Field (Campaign, Project, Task, or Proof) so the value maps over automatically.
- If the field applies to both Projects and Campaigns, use cascading Custom Fields to push required answers into multiple deliverables when you accept a Campaign Request.

B — AT KICKOFF

Provided at the start

Add it to Request acceptance and item creation

- **Campaigns and Projects:** check "Required for" Campaigns, Projects, or both in **Account Settings › Custom Fields**.
- **Tasks and Proofs:** select "Required field" when you create the Custom Field on the Tasks or Proofs tab.
- Lytho asks for the required value when the item is created or the Request is accepted.

C — IN FLIGHT OR AT CLOSE

Provided during or at the end

Add it to Campaign, Project, Task, and Proof details

- Pin Custom Fields inside Project Templates so they stay visible.
- Task and Proof Custom Fields display in the sidebar of each Task or Proof.

STEP 3 · THE PAYOFF

Reporting Nirvana

Use your Custom Fields in reports on every type of work.

Projects | Campaigns | All Work | Proofs | Tasks | Reviews | Time