

Workflow Examples

For Creator Delivery Desk. Use these examples when a collaboration involves instalments, revision decisions or a usage check after delivery.

Common delivery situations

A deposit and a final balance

Create one Payments item per agreed instalment, each linked to the same Project. For a fictional USD 600 collaboration paid half upfront and half after approval, record Deposit USD 300 and Final balance USD 300. Give each its own Due basis, Due date and Status. Do not add a third USD 600 total row: that would count the fee twice. Mark only the instalment actually received as Paid. If an instalment is only partly received, keep it unpaid and record the receipt and remaining amount in that payment page; the template has no automatic balance calculation.

Feedback on V1

Ask the brand to collect feedback on the same labelled review version. Put the exact feedback, source link and round label in the Request page. Use separate Request items when changes need different scope decisions, such as a caption edit and an extra format. The number of Request rows is not a count of revision rounds. Keep Reviewed version tied to the file they saw, and update Target version only after agreeing the work.

A usage check after delivery

Write the agreed channels and usage window in the Project page and keep the source agreement linked. Add a Next action such as Check agreed usage end date with an Action date. Keep that Project out of a completed stage while this follow-up is still open, or use a separate calendar reminder if you archive the Project. Where several assets have different windows, record each window beside its Deliverable. An end date is a cue to check the agreement and current use; it does not prove a breach or automatically create a renewal fee.

Files, dates and status changes

Use the external File URL for large videos and raw-footage folders, with version labels. Notion's Free plan currently limits each upload to 5 MB. Check the review link with the recipient's access before sending it.

Action date is a date to act, not a preconfigured notification. You can set your own Notion reminder in the date picker or use your existing calendar. Later actions may stay outside Next actions until they match its attention filters; use the full Projects database to see them.

Keep the original status options when starting. If you add or rename options, check formula results and focused-view filters against the full database before using the new workflow.