



Assigning Orders



What is Assigning Orders

- The Assigning Order feature enables you to assign orders internally to others in your organization, especially if additional reviews are needed.

Why is This Useful

- What we've heard from our clients was that if they need someone else to look at a candidate's order, they had to manually pull out the order and send it via email. This created additional steps that could sometimes cause delays.
- By using the Assigning Orders feature, clients can delegate individuals or teams to review an order. Since this can all be done within the Sterling platform, clients are able to track the status of who is reviewing the order.

How to Use Assigning Orders

- To use the Assigning Orders feature, you'll start by accessing your Orders dashboard.
- When you click on the checkbox next to an order, 4 additional options will appear above on the right-hand side: Open, Assign to, Archive, and Clear All.
- Click on 'Assign to' to select a user within your organization as the new Assignee. Once selected, you'll get a popup confirmation that your order(s) have been reassigned.
- **Note:** This feature only works for those who have a credential to log into Client Hub. To add someone from your organization into this feature, please reach out to your dedicated Client Success Partner.

You can view this quick guide on how to find and use Assigning Orders [here](#).

If you have any questions on Assigning Orders, please reach out to your Client Success Partner.