

Client Training HQ

VIP™ Solution Favorites Overview

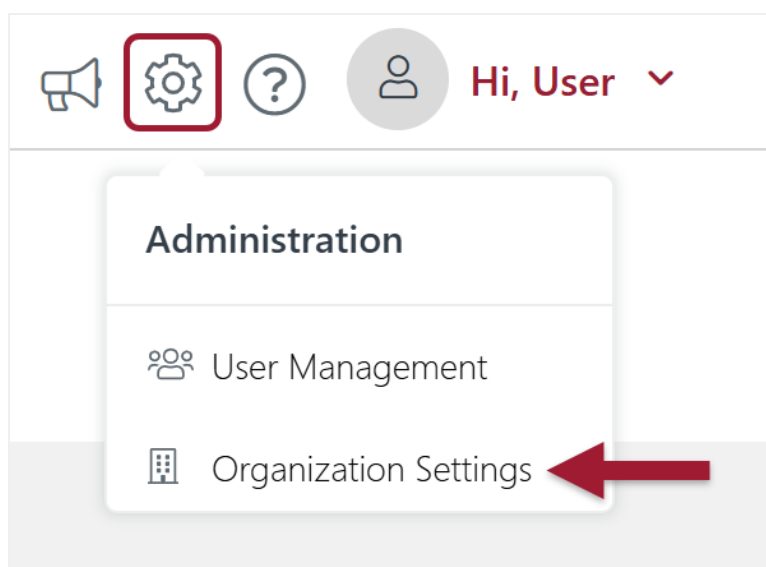
Org-level and Loc-level WebManagers have the ability to select up to four favorite The Work Number® solutions that will then be displayed near the top of the New Order screen for all users within the organization.

NOTES:

- Only The Work Number solutions can be selected as Favorites. Other solutions (including, but not limited to, Network Verification Solutions, Reverify, Asset View™, and Verification of Education) are not included in this feature.
- Individual users are not able to designate individual favorites. Only Org-level and Loc-level WebManagers are able to designate favorites, and the choices are implemented across the entire organization, including all locations. Note that any WebManager can make updates to these designated favorites, so please coordinate within your organization.

Setting Up Solution Favorites for Your Organization

1. Click on the **gear icon** in the *top right corner* of any VIP™ screen, which will expand the **Administration** menu.
2. Select **Organization Settings**.



Images are examples and for information purposes only. They may vary across platforms and are subject to change.

3. The **Favorites** screen opens.
 - a. Under **Manage Settings**, toggle the **Solution Favorites** button to **On**.
 - b. Use the **Solutions** dropdown to select **up to four solutions** to appear in the favorites section for all users in your organization.

Organization Settings

Favorites

Discard Changes Save Settings

Manage Settings

Solution Favorites

Display favorite solutions near the top of the homepage. This can help users or organizations that have access to many solutions.
[Show Example](#)

Solution Selection (Max of 4)

Select up to 4 solutions that will appear in the favorites section for all the users in your organization.

Solutions

Choose options

- ☐ Solution 1
- ☐ Solution 2
- ☐ Solution 3
- ☐ Solution 4
- ☐ Solution 5

- c. Click the red **Save Settings** button to save your selection(s).
4. Once the selection(s) have been saved, you will see a green message: **Changes have been saved.**

Organization Settings

Favorites

Changes have been saved.

Manage Settings

Solution Favorites

Display favorite solutions near the top of the homepage. This can help users or organizations that have access to many solutions.
[Show Example](#)

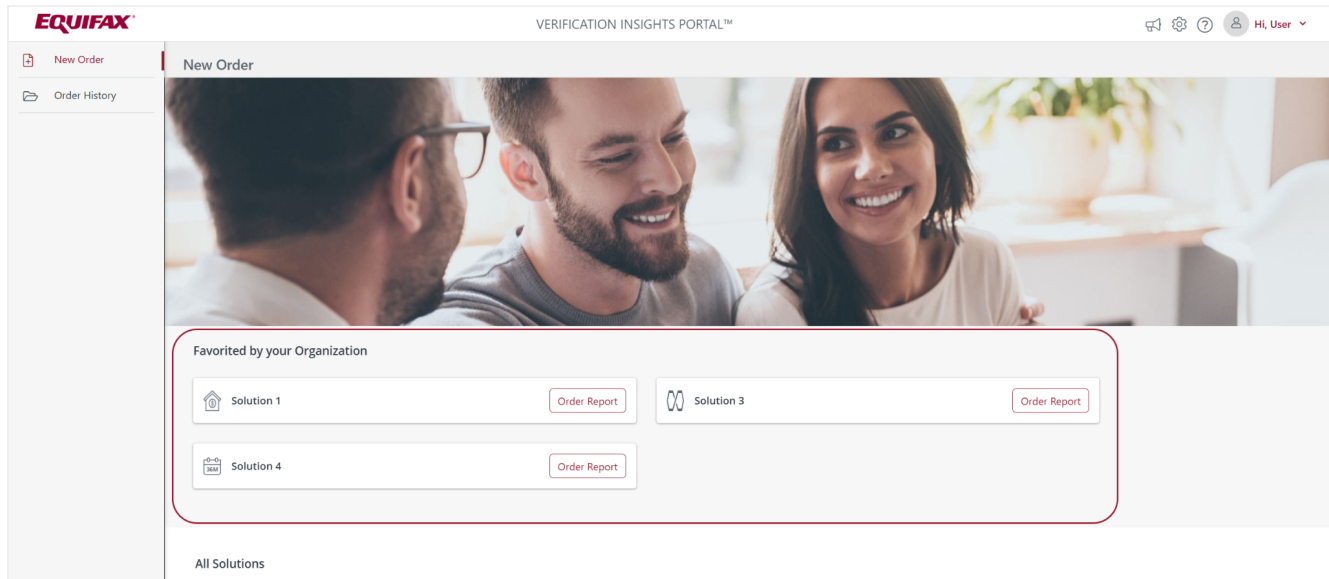
Solution Selection (Max of 4)

Select up to 4 solutions that will appear in the favorites section for all the users in your organization.

Solutions

3 Selected

5. In the **New Order** screen, you will now see the selected solution favorite(s) under the banner in a section titled **Favorited by your Organization**.



NOTE: These favorited solutions will appear in alphabetical order.

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The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.