Getting Help and Next Steps

Where to get help. For anything about **access** — signing in, your password, or not being able to see the dashlet or a record you think you need — contact **Sharon Rose** [contact method to be added]. For judgment calls — a hard-to-place engagement, or which mentor is the right fit — a colleague on your team or your lead is usually the best sounding board.

Your workflow at a glance. Working from the **Client Assignment Team** dashlet, you review each new **Submitted** engagement and verify its records (Section 2), find a capable mentor against the client's industry and requested areas (Section 3), and assign it by setting the **Assigned Mentor** and **Assigned Users**, making that mentor the **Assigned User** on the engagement's contacts and the client too, and setting the status to **Pending Acceptance**. Declined and dormant engagements come back to the same dashlet, and you reassign them the same way (Section 4).

The one thing to never skip. Make the mentor the **Assigned User** everywhere they'll need to look — the engagement, its **contacts**, and the **client**, not just the Assigned Mentor field. It's the easiest step to overlook and the one that quietly breaks things — a mentor who can't open their engagement or its records almost always traces back to a missing or mismatched Assigned User.

Keep the Introduction handy. This guide builds on the CRM Introduction — the records, how they connect, and why access follows the User account. Keep it nearby as a refresher whenever something is unfamiliar.

Thank you. Your matches are where every mentoring relationship begins. Getting the right mentor — and their access — set up cleanly is what lets the work start smoothly, so thank you for the care you put into it.

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