Hello,

Here are a few simple instructions for the Sales Capacity Assessment on the FinxS Admin Platform.

Log on to https://www.finxs.com/users/sign_in

You will need your username and password to log on to the admin site. You can reset your password if you do not remember.

This document will assist you in:

1. **Reprinting an Individual Report**
2. **Creating a Team Report**
3. **Editing an Access Code**
4. **Creating an Access Code**

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If you need any additional help,

please email CustomerService@ExtendedDISC.org

or call 281-298-6073.

Thank you, Extended DISC!

1. <mark>**Sales Capacity Assessment- Reprinting an Individual Report**</mark>

- From tabs at the top of your page, **go to Database** > **Individuals** or via the FinxS home screen, **select** "**Direct Link to Database**"

- From here, **Click Values** on the left of the screen
  - Your database will appear in the middle of your screen.

- Search for the person by name or access code etc. using the search fields
  - **Place a check mark by the person's/persons' name(s) you wish to reprint.**

- Scroll to the top or bottom of the page and Click on **"Print PDF"**

  - An Option Box will open.

    - **REPORT TYPE:** Choose desired report type from the drop-down menu
    - **REPORT TEMPLATE:** will remain as "**EDNA Template**"
    - **LANGUAGES:** Choose desired language
    - **REPORT SECTIONS:**
      - Put a check mark next to sections to be included in report
      - Section order can be changed my dragging the compass icon to desired position
    - **METHOD:** Choose **"Method"** as either download or send email (if you choose download the file is downloaded to your computer, if you choose send email you will be prompted to type an email to send the report.)

- **Click "OK"** at the bottom and the report will be downloaded or emailed immediately.

2. <mark>Sales Capacity Assessment- Creating a Team Report</mark>

- From tabs at the top of your page, **go to Database** > **Individuals** or via the FinxS home screen, **select** "**Direct Link to Database**"

- From here, **Click Values** on the left of the screen
  - Your database will appear in the middle of your screen.

- Search for the person by name or access code etc. using the search fields
  - **Place a check mark by the individuals' names you wish to include**

- Scroll to the top or bottom of the page and Click on **"Print PDF"**

  - An Option Box will open.

    - **REPORT TYPE:** Choose desired team report type from the drop-down menu
    - **REPORT TEMPLATE:** will remain as "**EDNA Template**"
    - **LANGUAGES:** Choose desired language
    - **METHOD:** Choose **"Method"** as either download or send email (if you choose download the file is downloaded to your computer, if you choose send email you will be prompted to type an email to send the report.)
    - **ORGANIZATION:** Enter the team's organization name

- **Click "OK"** at the bottom and the report will be downloaded or emailed immediately.

3. Sales Capacity Assessment- Editing an Access Code

- From tabs at the top of your page, **go to Projects** > **Values**

- On the left-hand side of your screen you will see all of your Project Names listed.
  - You can change the Project Names to access codes by:
    - Clicking on the **"Project Name"** Field (located in the upper-left corner, under the FinxS logo) and changing to **Access Codes.**
    - Now the projects are listed by access codes.

- Click on the **Access Code/Project** you wish to update or change.
  - The details of that **Access Code/Project** will now appear in the middle of your screen.

- Once the appropriate Access Code/Project is selected, **scroll down** until you see an **"EDIT"** button in the lower-right corner.

- Click on **"EDIT"**

- Edit the information you would like changed.

- Once the information is edited, **scroll down** until you see a **"SAVE"** button in the lower-right corner.

- Click on **"SAVE"** and the Access Code/Project has been updated.

4. <mark>Sales Capacity Assessment- Creating an Access Code</mark>

WE SUGGEST YOU SKIP THE BLUE HIGHLIGHTED SECTIONS

- From tabs at the top of your page, **go to Projects** > **Values**

- In the lower left corner of your browser, **click on the "+"** to create a new access code

- **Complete the following fields:**
  - **Country:** Choose country from drop-down
  - **Organization:** Input Organization or Department name
  - **Access Code:** 2 parts (ENG-Example)
    - **Prefix (ENG)**- Select a Country Code if options available; such as ENG, ECA, EUK etc.
    - **Suffix** – This will be after the dash in the access code, up to 12 characters and must be a unique code in our system.
  - **Name:** Type in the name of the project (i.e. *ABC Inc- SCA*); the participant will not see this identifier
  - **Name shown to respondent:** what is entered here will be shown as the participant completes the questionnaire
  - **Additional information:**
  - **Questionnaire: Select "Sales Questionnaire"**
  - **Send method:** (3 choices)
    - **None**- nothing sent
    - **Has answered- email**- email sent to notify of completion (no report attached)
    - **PDF- Report** (Recommended)- Email sent with SCA report attached
  - **Protect PDF attachment:** If you place a check mark, the PDF will be locked and you will need a password to view the PDF
  - **PDF attachment password:** If you choose to protect the PDF with a password, here is where you will create a password

- **Report Type:** Choose desired report type from the drop-down menu
  - **Hiring**
  - **Development**
  - **Manager**
  - **Report Modules**
- **Report Template:** EDNA Template
- **Languages:** From the drop-down choose the language you wish to receive the report in

- **Report Sections:**
  - Put a check mark next to sections to be included in report
- **Answering interface:** Default Answering interface
- **Description:** You can enter additional details for your project here
- **To:** Enter email for PDF report to be sent
- **Cc:** Enter additional emails for PDF report to be sent
- **Bcc:** Enter additional emails for PDF report to be sent
  - *Separate multiple emails with a ","*
- **Send to respondent:** check box if you want a copy automatically sent to respondent (not recommended)

WE SUGGEST YOU SKIP THE BLUE HIGHLIGHTED BELOW and scroll down and click SAVE in the lower right corner and your access code is ready to be used.

- **First day open:** Enter the first day your access code should be open, this will default to the day the access code is created if left blank
- **Last day open:** Enter the closing date for your access code, this will allow the code to stay active if left blank
- **Status:** (3 choices)
  - **Closed**
  - **Active**
  - **Pending**
- **Click "Save"**