

Projects (Access Codes)

Editing System Emails and Thank You Page

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Projects (Access Codes):

- Editing Emails and Thank You Page

WEBSITE: <https://www.FinxS.com/admin>

Login:

- Username:
- Password:

Please contact us if you need assistance:

Extended DISC Assessments
CustomerService@ExtendedDISC.org

1.800.257.7481

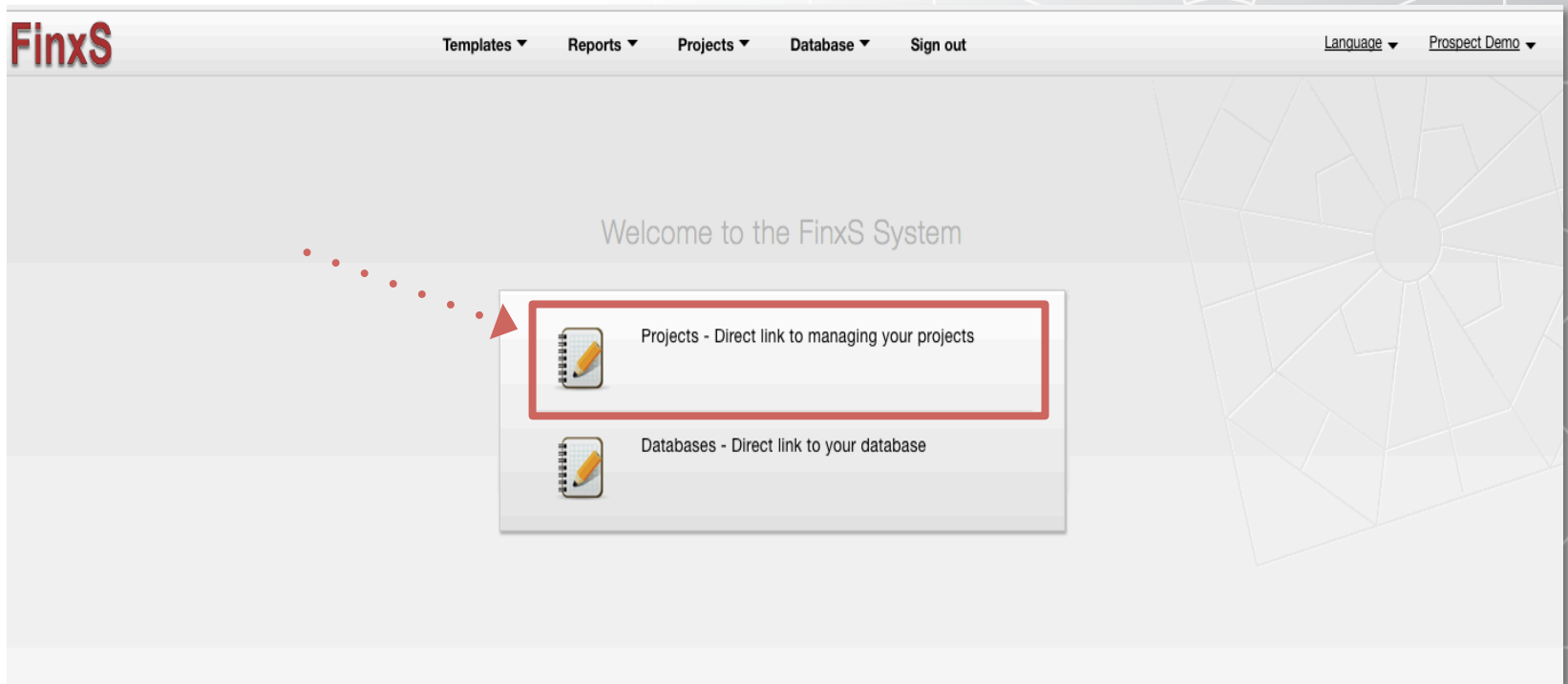
1.281.298.6073



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Projects (Access Codes): Emails and Thank You Page

- From main menu click on **Projects**



Projects (Access Codes): Getting Started

1. Click on the Project (Access Code) listed in left column to be edited (Pull down menu allows you to select by Project Name or Access Code)

The screenshot displays the FinxS web application interface. The top navigation bar includes 'Templates', 'Reports', 'Projects', 'Database', and 'Sign out'. The left sidebar shows a list of project categories: 'BEHAVIORAL ANALYSIS', 'BUSINESS AND FINANCE TEAM', 'Inactive ABC', 'Leadership Assessment', 'PLAYGROUND TEAM SAMPLES' (highlighted in a red box), and 'TECH SUPPORT TEAM'. The main content area shows a form for editing project details, with tabs for 'General', 'Allowance', 'Thank You Page', 'Project instructions', 'Project email', 'Project email to respondent', and 'Summary'. The form fields include:

Owner	Prospect Demo <input type="button" value="Change"/>
Country	United Kingdom
Organization	EDNA
Access Code	EUK-TEAMSAMPLE
Name	PLAYGROUND TEAM SAMPLES
Name shown to respondent	EUK-TEAMSAMPLE
Send method	None
Answering interface	Default Answering Interface
Description	
Visibility Rights	1 user <input type="button" value="Edit"/>
Created / Updated	12.10.2013 17:08:00 / 09.29.2016 20:28:48
Research Module	None
First day open	12.10.2013
Last day open	
Status	Active

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Projects (Access Codes): Editing Thank You Page (Landing Page)

Thank You! Page (tab) – respondents are directed to landing page when questionnaire is completed

- **Forward WWW:** Directed to a specific website
 - Correct format: <http://www.company.org>
- **Default Thank You! Page:** system default Thank You! Page
- **Project Thank You! Page:** You customize thank you page
 - See examples in image below

General • Allowance **Thank You! Page** Project instructions Emails Summary

Thank You! Page Type Forward WWW Default Thank You! Page Project Thank You! Page

Project Thank You! Page Example 1: Thank you for completing the questionnaire. Your DISC Assessment will be provided to you at the upcoming DISC Workshop. Taking the questionnaire more than once may result in additional charges. Please contact John.Smith@ABCInc.com for any questions.

Project Thank You! Page Example 2: Thank you for completing the questionnaire. Your results will be emailed to you. Please check your SPAM file if you do not see it in your Inbox.

Cancel Save

Projects (Access Codes): Project Emails

Project email (tab): Edits email content sent to project emails and respondent (if selected) E.g., add instructions like “please print out” or add your contact info

- Click on **Email** tab of selected Project/Access Code (left column) and choose **Project Email** or **Project email to respondent**. Click **Edit** button.
- Edit content in **Project Email** (for Project email recipient)
- Edit content in **Project template to respondent** (for questionnaire participant)
- Delete but do NOT edit within any of the data brackets (e.g., **{% if response_user.correct? and response_user.paid? %}**)
- Click **Save**

General Allowance Thank You! Page Project instructions Emails Summary

Project email Project email to respondent

Project email

Subject: Behavioral Analysis - Automatic Result

Dear `{{ recipient.username }}`,

RESPONDENT:

Email: `{{ response_user.email }}`
First name: `{{ response_user.first_name }}`
Last name: `{{ response_user.last_name }}`
Password: `{{ response_user.used_password }}`
Access Code: `{{ access_code }}`

`{% if response_user.correct? and response_user.paid? %}`
Please find the results attached.
`{% elsif response_user.paid? %}`
Please note it was not possible to produce a report since the answers given were not consistent (however, if the Project included other questionnaires, their results may be attached). Contact your local FinxS representative for more details.
`{% else %}`
Please note it was not possible to produce a report. Contact your local FinxS representative for more details.
`{% endif %}`

Edit

Projects (Access Codes): Results Emails Subject Line

Results email Subject line: Quickly identify reports/results (e.g., if you receive many reports and want to open only specific results) by editing subject of email and/or add respondent's name.

- Click on **Email** tab of selected Project/Access Code and click **Edit**
- Edit **Subject** line and click **Save**

Project template

Subject: Behavioral Analysis - Automatic Result

Default Subject Line

Project template

Subject: Extended DISC Report for ABC Company - name{{ response_user.last_name }}

Edited Sample Subject Line

TIP: If you copy and paste the Last or First name fields {{Brackets}} into Subject heading then system will automatically fill in name of respondent.

Know your General Data Protection Regulation guidelines for EU citizens. Contact us for more information.



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