

SALES COMPETENCE I HOW TO: Generate a Sales Competence Assessment

- Log into your FinxS Account
- Go to the '**Database**' tab on your dashboard and click on '**Individuals**' in the dropdown menu
- Expand the '**Competence Assessment**' category in the column on the left
- Select the required Project Name/Access Code
- Tick the small box next to the required candidate's name
- Click on the '**Print PDF**' button that has appeared top left
- Ensure the 'Report Tool' is '**Competence System Report**'
- Choose a '**Report Type**' from the dropdown menu
- Select a '**Report Template**' if you have your own branded ones, or otherwise leave it on 'Standard BA Template'
- Select required language
- Leave all the '**Report Sections**' ticked, unless you wish to deselect some
- Choose either '**Download PDF**' or '**Send Email**'
- Click **OK**

The 'Options' dialog box contains the following settings:

- Report Tool:** Competence System Report
- Questionnaire Sales**
- Report Type:** Recruitment
- Report Template:** Standard BA Template
- Languages:** English (Australasia)
- Report Sections:**
 - ☒ Cover Page
 - ☒ Introduction
 - ☒ Executive Summary
 - ☒ Individual Scores
 - ☒ Mindsets
 - ☒ Sales Roles
 - ☒ System roles
 - ☒ Sales Revealer
 - ☒ Sales Creator
 - ☒ Sales Forerunner
 - ☒ Sales Innovator
 - ☒ Sales Dealer
 - ☒ Sales Provider
 - ☒ Sales Counselor
 - ☒ Sales Partner
 - ☐ User roles
 - ☒ Excuse Index
 - ☒ Questions
- ☒ Download PDF ☐ Send Email

POINTS

Marianne Curie:	0
Total cost:	0

Buttons: Close, OK