

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 each required **candidate's name**
- Click on the '**Print PDF**' button that has appeared top left
- Ensure the 'Report Tool' is '**Competence System Report**'
- Choose the required Report Type from the '**Report Type**' dropdown menu
- Select a '**Report Template**' if you have your own branded ones, or otherwise leave it on 'Standard BA Template'
- Change the language, if required
- Leave all the '**Report Sections**' ticked unless you want to remove some
- Enter an **organisation name** (optional)
- Click '**OK**'

