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SALES COMPETENCE I HOW TO: Download Sales Competence Report Modules

- Log into your FinxS Account
- Go to the '**Database**' tab on your dashboard and click on '**Individuals**' in the dropdown menu
- Expand '**Competence Assessment**' in the left-hand column
- Select the required Project Name/Access Code
- Click on the small box next to the required candidate's name
- Click on the '**Print PDF**' button that has appeared top left
- In the pop-up box, make sure the '**Report Tool**' is '**Competence System Report**'
- Under '**Report Type**', select '**Modules**' from the dropdown menu
- Select a '**Report Template**' if you have your own branded ones, or otherwise leave it on 'Standard BA Template'
- **Select the required module from the list (N.b., you can only generate one report module at a time)**
- Select either '**Download**' or '**Email**'
- Click '**Ok**'

