
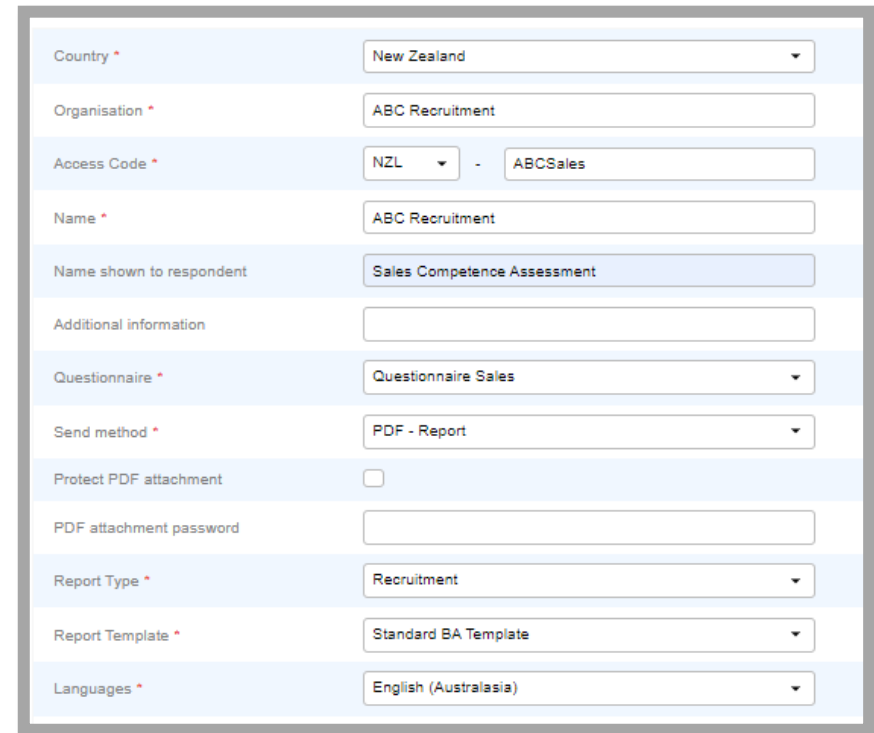


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SALES COMPETENCE I HOW TO: Creating a project

4. Creating a Project

- Log into your FinxS Account
- Go to the **'Projects'** tab on your dashboard and click on **'Competence Assessments'** in the dropdown menu
- Click  on the symbol in the bottom left hand corner
- In the first field, 'Country', check the correct one is showing
- Enter the **'Organisation'** name
- Create an **'Access Code'**
- Give your project a **'Name'** (This will appear in the column on the left and will not be shown to respondents)
- Enter the **'Name shown to respondent'** – You can call it **Sales Competence Assessment**.
- Ensure the **'Questionnaire'** is 'Questionnaire Sales'
- The **'Send Method'** should be 'PDF – Report'
- Select the **'Report Type'** you require
- Select a **'Report Template'** (if you have your own branded template), or leave it on 'Standard BA Template'
- Select the 'Language' for the report



The screenshot shows a form for creating a project. The fields and their values are as follows:

Field	Value
Country *	New Zealand
Organisation *	ABC Recruitment
Access Code *	NZL - ABCSales
Name *	ABC Recruitment
Name shown to respondent	Sales Competence Assessment
Additional information	
Questionnaire *	Questionnaire Sales
Send method *	PDF - Report
Protect PDF attachment	<input type="checkbox"/>
PDF attachment password	
Report Type *	Recruitment
Report Template *	Standard BA Template
Languages *	English (Australasia)

- Ensure all the '**Report Sections**' are ticked or untick the sections you do not want to see in the report
- Enter a '**To**' email address
- **Send to Respondent** – your choice, not usually ticked
- **Allowance Type** – always choose 'Unlimited'
- **Require Password** – select "Yes" if required or "No" if not
- If **passwords generate** select number, copy and save elsewhere
- **Select the opening date** as the day before to cover the time difference between here and Finland, where the platform is run from
- **Closing date** – leave blank
- Status – leave as "**Active.**"
- Select "Save" at the bottom right of the screen.
- Click '**Save**' in the bottom right hand corner

The screenshot shows the 'Create Project' form in the HR Profiling Solutions system. The form is divided into several sections:

- Report Sections:** A list of sections with checkboxes. Ticked sections include: Cover Page, Individual Scores, Mindsets, Sales Roles, System roles (Sales Revealer, Sales Creator, Sales Forerunner, Sales Innovator, Sales Dealer, Sales Provider, Sales Counselor, Sales Partner), Excuse Index, and Questions. Unticked sections are Introduction and Executive Summary.
- Answering interface:** A dropdown menu set to 'HR Profiling Solutions Answering Interface'.
- Description:** A large text area for project details.
- To:** A text field containing 'michelle.pelzer@hrprofiling.com'.
- Cc:** An empty text field.
- Bcc:** An empty text field.
- Send to respondent:** An unchecked checkbox.
- Allowance Type:** Radio buttons for 'Unlimited' (selected) and 'Limited'.
- Require Password:** Radio buttons for 'Yes' and 'No' (selected).