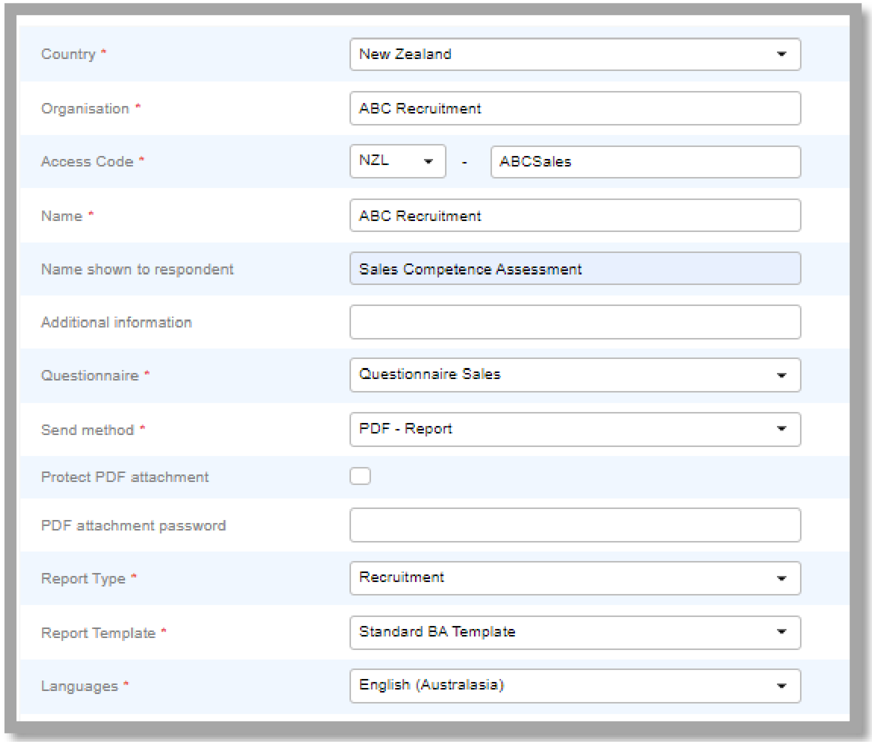
SALES COMPETENCE I HOW TO: Creating a project

4. Creating a Project



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	
PDF attachment password	
Report Type *	Recruitment
Report Template *	Standard BA Template
Languages *	English (Australasia)

- Log into your FinxS Account
- Go to the **'Projects'** tab on your dashboard and click on **'Competence Assessments'** in the dropdown menu
- Click on thesymbol 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

- 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