Admin Quick Setup Steps

Step 1: Purchasing Credits

Need assessment credits?
Pay-as-you-go accounts start here; Billable Monthly accounts skip ahead to step 2.

To purchase:

1. On your Dashboard homepage under **Assessments & Credits**, select the cart icon to the right of the assessment type you would like to purchase. 1 credit equals 1 user completing the assessment.
2. Enter the quantity desired and click **Add to Order**. You can repeat this process if you want to bundle multiple assessments into one order.
3. To complete your order, click **Checkout**. Enter your payment details and click **Pay Now**. Your credits will be added to your account immediately. Your credit card will also be immediately billed.

Step 2: Setting Up Groups (OPTIONAL)

Note: This is an organizational tool and is NOT needed to create Group Reports.

1. From the Managing Assessments tab on your left-hand side menu, click on **Managing Assessments**.
2. Once on this page, click on **+ ADD GROUP** to add a new group.
3. Type in the name of the group and click **Save Group**.

Step 3: Set Up and Send Your Assessment Access Link

1. From the Managing Assessments tab on your left-hand side menu, click on **Managing Assessments**, then the **Assessment Links** option in the drop-down menu.
2. To create a new Assessment Access Link, click on **+ Add New Link**.
3. This will take you to the Assessment Link form, where you will set the rules for this particular invitation you would like to create.
4. When finished with the setup, click **Save**.
5. Invite your assessment users by registering them from your Dashboard. Use the invite box at the top of your homepage, **or** click **Invite** next to your link on the Assessment Links page. Note: Registering a user uses one credit.

Why register from your Dashboard? Your users receive only their unique return link, not the assessment link, so there's no mixing the two up and no chance they try to register a second time. That return link also gives them ongoing access to their individual assessment record. This is the recommended way to register users.

Prefer to send the link yourself? Copy your assessment link and send it to your assessment users. Assessment links are for registration only, so each person uses theirs just once. After registering, they immediately receive an email with their return link, which is how they get back to their assessment record from that point on.