

Admin Account Quick Setup Steps

Step 1: Purchasing Credits

If your account has been set up to purchase assessments on a “**pay as you go**” basis, you will have access to buying them directly from your home page. If you are a “**billable monthly**” client, you will simply see the list of available assessments without a purchase option.

1. Hover over the name of the assessment and click the “**Add Credits**” button. You can also click directly on the assessment name.
2. You will be asked to enter a total 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, fill in the credit card details below the total and click “**Submit Order**”. Your credits will be immediately added to your account. Your credit card will also be immediately billed.
4. If you have put your credit card on file via the **Account** page, there will be an option to use your card on file. You can then click that option followed by “**Submit Order**”.

Step 2: Setting Up Groups (OPTIONAL)

1. From the Managing Assessments tab on your top menu, click on **GROUPS**.
2. Once on this page, click on “**CLICK HERE TO ADD A NEW GROUP**”.
3. To add a new group to your list, type in the name of the group and click “**Update**”.
4. To edit an existing group, click on the “**Edit**” icon (pencil) next to the group name you wish to edit. Modify the name of the group and click the “**Update**” button. Your group name will then be modified.
5. To delete a group, click on “**Delete**” icon next to the group name below.

Step 3: Setting up an Assessment Access Link

1. From the Managing Assessments tab on your top menu, click on **Manage Assessment Links**.
2. To create a new Assessment Access Link click on “**CREATE A NEW ASSESSMENT ACCESS LINK**”.
3. **Fill in all required/desired fields.** Do not forget to assign the assessment(s) you plan to use with the link. They are checkboxes located on the right of the page.
4. When finished with the set up click “**Insert**”
5. When you complete the setup of each link you will provide that link to the assessment users via an email you send from your own email program. You also have the option of using our system to send invitations using the “**Send Assessments**” feature found on your home page.