

SalesDrive Assessment Dashboard User Guide

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4 Steps to Sending an Assessment:

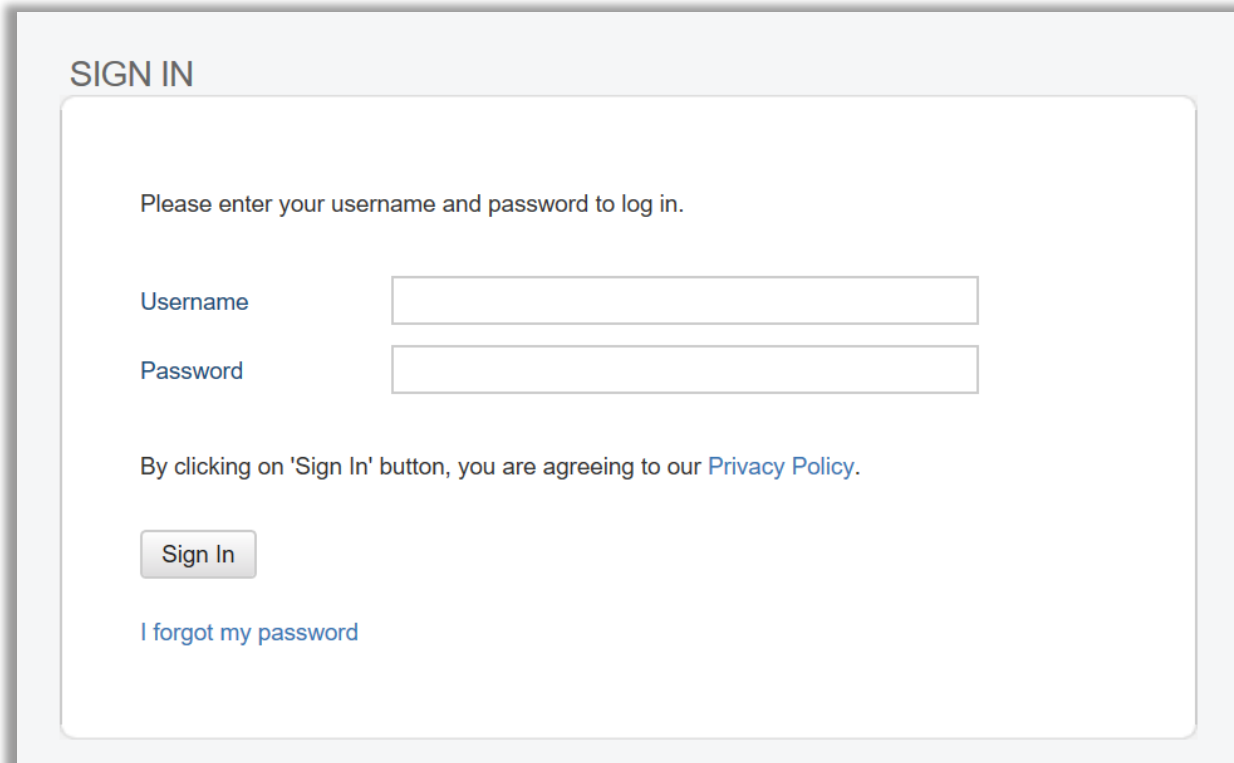
For video tutorial, please [click here](#).

1. Login and click **SalesDrive Assessment Dashboard** under project name.
2. In the upper left hand corner, click **Register New Participant**.
3. Complete the form with your candidate's information. **Use your company name**, it populates into the email sent.
4. Click **Add Participant** and you're done. This action automatically sends an email to your candidate with a link to complete the assessment.

When the assessment is completed, you will get **email notification** that the results are ready to be viewed on the dashboard.

Accessing the Dashboard

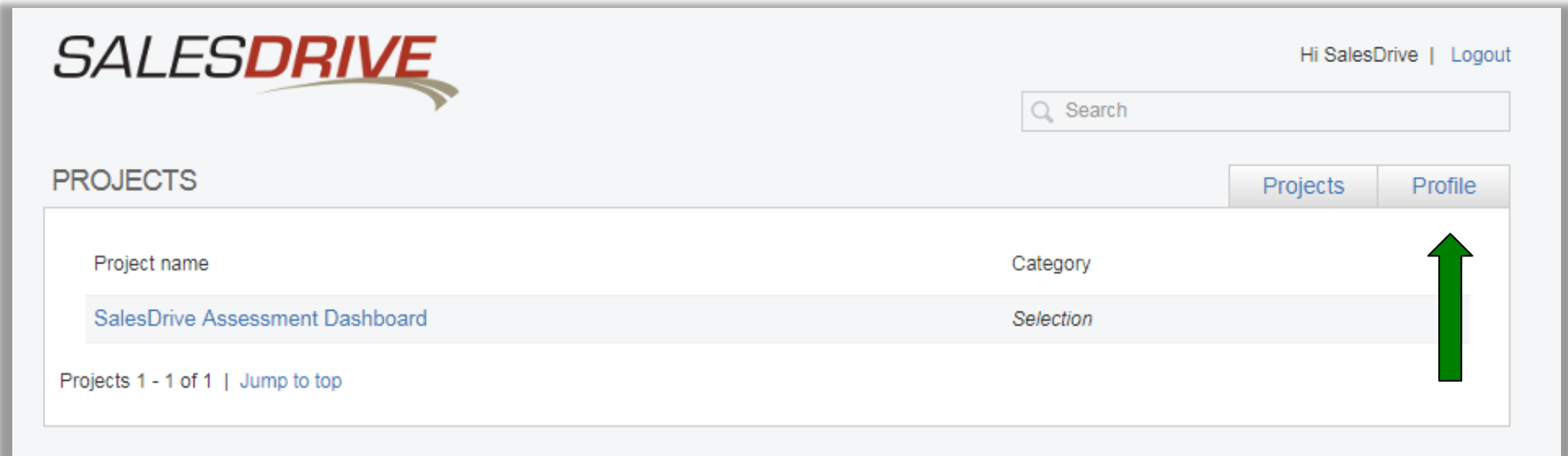
1. Go to <https://salesdrive.quintelagroup.com>
2. On the **SIGN IN** page, enter **Username** (*FirstnameLastname*) and **Password**.



The image shows a screenshot of the 'SIGN IN' page. At the top, it says 'SIGN IN'. Below that, there is a prompt: 'Please enter your username and password to log in.' There are two input fields: 'Username' and 'Password'. Below the input fields, there is a line of text: 'By clicking on 'Sign In' button, you are agreeing to our [Privacy Policy](#).' At the bottom, there is a 'Sign In' button and a link that says 'I forgot my password'.

Accessing the Dashboard *continued*

To change your password, after logging in, click **Profile** in the upper right hand corner.

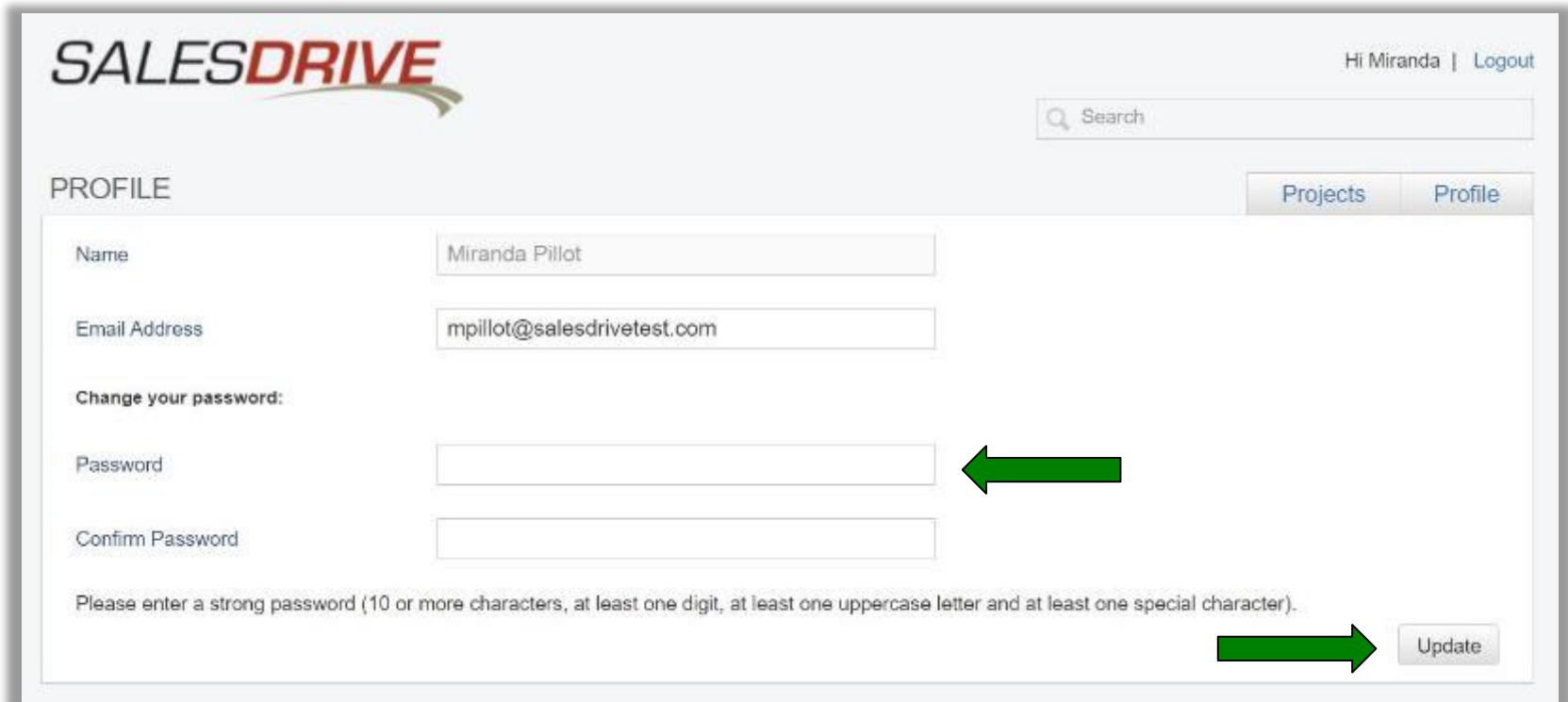


The screenshot shows the SalesDrive dashboard interface. At the top left is the SalesDrive logo. At the top right, it says "Hi SalesDrive | Logout". Below the logo is a search bar with a magnifying glass icon and the word "Search". Underneath the search bar is a "PROJECTS" section. On the right side of this section are two buttons: "Projects" and "Profile". The "Profile" button is highlighted with a green arrow pointing upwards. Below the buttons is a table with two columns: "Project name" and "Category". The first row in the table has "SalesDrive Assessment Dashboard" under "Project name" and "Selection" under "Category". At the bottom left of the table area, it says "Projects 1 - 1 of 1 | Jump to top".

Accessing the Dashboard *continued*

Under **Change Your Password**, enter your new password twice and click **Update**.

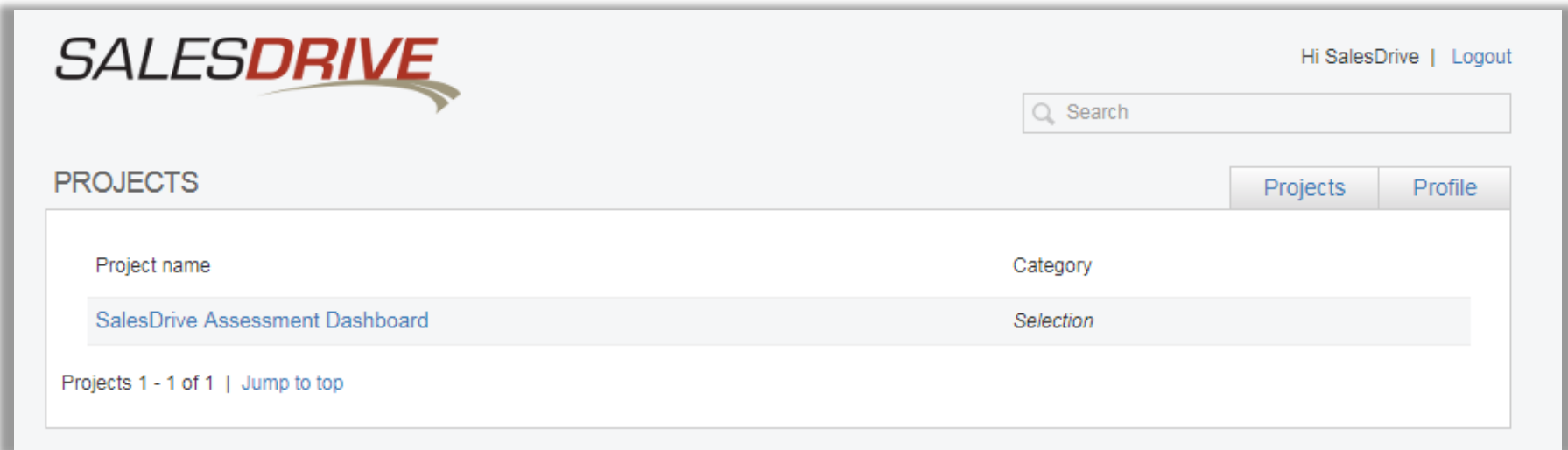
Requirement: At least 10 characters, 1 capital letter, 1 number and 1 special character



The screenshot shows the SalesDrive user profile page. At the top left is the SalesDrive logo. At the top right, it says "Hi Miranda | Logout". Below the logo is a search bar with a magnifying glass icon and the word "Search". The main content area is titled "PROFILE" and has two tabs: "Projects" and "Profile". The "Profile" tab is active. Under the "Profile" tab, there are several form fields: "Name" with the value "Miranda Pilot", "Email Address" with the value "mpilot@salesdrivetest.com", and a section titled "Change your password:". This section contains two password input fields: "Password" and "Confirm Password". A green arrow points to the "Password" field. Below the input fields is a text requirement: "Please enter a strong password (10 or more characters, at least one digit, at least one uppercase letter and at least one special character)". At the bottom right of the form is an "Update" button, with a green arrow pointing to it.

Accessing the Dashboard *continued*

On the **PROJECTS** page, click on **SalesDrive Assessment Dashboard** project link.



The screenshot displays the SalesDrive user interface. At the top left is the SalesDrive logo. On the top right, it says "Hi SalesDrive | Logout". Below the logo is a search bar with a magnifying glass icon and the text "Search". The main heading is "PROJECTS". To the right of this heading are two tabs: "Projects" (which is active) and "Profile". Below the tabs is a table with two columns: "Project name" and "Category". The table contains one row with the project name "SalesDrive Assessment Dashboard" and the category "Selection". At the bottom left of the table area, it says "Projects 1 - 1 of 1 | Jump to top".

Project name	Category
SalesDrive Assessment Dashboard	Selection

Accessing the Dashboard *continued*

The SalesDrive Assessment Dashboard allows users to register participants, check assessment status, update participant information, send reminders and access reports.

The screenshot displays the SalesDrive Assessment Dashboard interface. At the top left is the SalesDrive logo. On the top right, it says "Hi SalesDrive | Logout". Below the logo is a search bar with a magnifying glass icon and the text "Search". The main heading is "SALESDRIVE ASSESSMENT DASHBOARD". To the right of this heading are two tabs: "Projects" and "My Profile". Below the heading, there are two links: "Register New Participant" and "Upload Participants". To the right of these links is a "Filter By Status" dropdown menu. Below the links, it says "Candidates selected: 0" with sub-links "[Show selected | Clear]". To the right of this is a "Group Actions" dropdown menu and a "Go" button. The main content area is a table with the following columns: Name, Company, Job Title, Recruiter, Date Added, Test Status, DriveTest® Report, and Production Builder™. The table contains four rows of data.

	Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest® Report	Production Builder™
<input type="checkbox"/>	1 Sample, Jill	SalesDrive, LLC	Outside Sales Rep	Demo, SalesDrive	11/06/17	11/06/17		
<input type="checkbox"/>	2 Sample, Bob	SalesDrive, LLC	Account Executive	Demo, SalesDrive	11/06/17	In Progress		
<input type="checkbox"/>	3 Sample, Tom	SalesDrive, LLC	Salesperson	Demo, SalesDrive	11/06/17	Invited		
<input type="checkbox"/>	4 Team, Support	supportteam	sales	Demo, SalesDrive	12/17/15	In Progress		

Registering Participants

1. To invite a single participant to complete the assessment, click **Register New Participant**.

The screenshot displays the SalesDrive Assessment Dashboard. At the top left is the SalesDrive logo. On the top right, it says 'Hi SalesDrive | Logout'. Below the logo is a search bar. The main heading is 'SALESDRIVE ASSESSMENT DASHBOARD'. On the right side, there are two tabs: 'Projects' and 'My Profile'. Below the dashboard heading, there is a link 'Register New Participant' with a green arrow pointing to it. To the right of this link is a 'Filter By Status' dropdown menu. Below the link, it says 'Candidates selected: 0' with links for '[Show selected | Clear]'. To the right of this is a 'Group Actions' dropdown menu and a 'Go' button. Below these elements is a table with the following columns: Name, Company, Job Title, Recruiter, Date Added, Test Status, DriveTest® Report, and Production Builder™. The table contains two rows of data.

	Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest® Report	Production Builder™
<input type="checkbox"/>	1 Sample, Jill	SalesDrive, LLC	Outside Sales Rep	Demo, SalesDrive	11/06/17	11/06/17		
<input type="checkbox"/>	2 Sample, Bob	SalesDrive, LLC	Account Executive	Demo, SalesDrive	11/06/17	In Progress		

Registering Participants *continued*

2. Enter the participant's information in the fields provided.

Use your full company name.

The company field will populate into the email invitation.

3. Once all required fields are completed, click **Add Participant** to send an email invitation to the participant. Alternatively, click **Cancel** to abort.

SALESDRIVE

REGISTER NEW PARTICIPANT

Please fill out the form below to register new participant. Fields marked with * are required.

First Name: *

Last Name: *

Email: *

Your Company: *

Job Title: *

Deadline (MM/DD/YYYY): *

By accessing or using this website to request testing, you agree to, and are bound by, these Terms of Use:

You acknowledge that the SalesDrive, LLC process is designed to be a component of Your Company's more complex overall assessment process, and that any decisions regarding candidates and personnel will be Your Company's alone, based upon its unique knowledge and needs, as well as applicable legal guidelines. Your Company protects and holds SalesDrive, LLC and its principals harmless from all liability for potential loss suffered by any person or entity who participates in this process.

Registering Participants *continued*

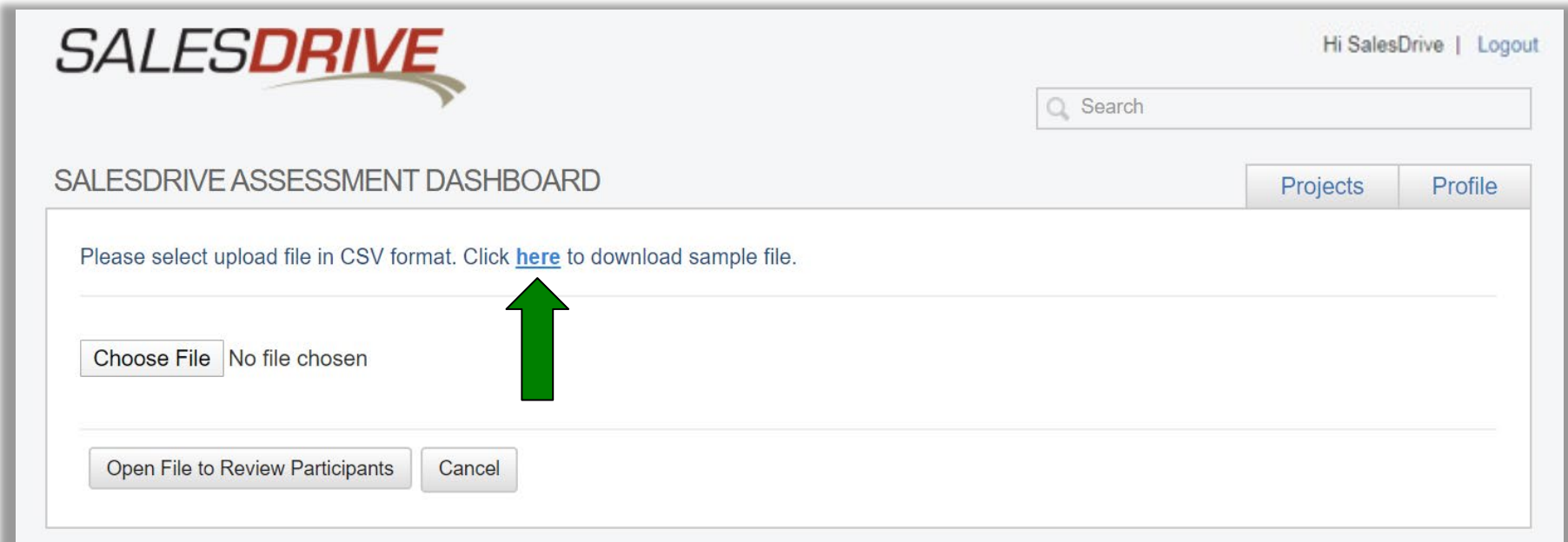
1. To invite multiple participants at once to complete the assessment, click **Upload Participants**.

The screenshot shows the SALES DRIVE ASSESSMENT DASHBOARD interface. At the top left is the SALES DRIVE logo. On the top right, it says 'Hi SalesDrive | Logout'. Below the logo is a search bar with a magnifying glass icon and the text 'Search'. The main heading is 'SALESDRIVE ASSESSMENT DASHBOARD'. To the right of this heading are two tabs: 'Projects' and 'My Profile'. Below the heading, there is a green arrow pointing to the 'Upload Participants' link. To the right of this link is a 'Filter By Status' dropdown menu. Below the 'Upload Participants' link, it says 'Candidates selected: 0' with links for '[Show selected | Clear]'. To the right of this is a 'Group Actions' dropdown menu and a 'Go' button. Below these elements is a table with the following columns: Name, Company, Job Title, Recruiter, Date Added, Test Status, DriveTest® Report, and Production Builder™. The table contains two rows of sample data.

	Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest® Report	Production Builder™
<input type="checkbox"/>	1 Sample, Jill	SalesDrive, LLC	Outside Sales Rep	Demo, SalesDrive	11/06/17	11/06/17		
<input type="checkbox"/>	2 Sample, Bob	SalesDrive, LLC	Account Executive	Demo, SalesDrive	11/06/17	In Progress		

Registering Participants *continued*

2. Create an Excel (CSV) file or use the sample file provided by clicking **Here**. (See next slide for file requirements.)



The screenshot displays the SalesDrive Assessment Dashboard. At the top left is the SalesDrive logo. At the top right, it says "Hi SalesDrive | Logout". Below the logo is a search bar with a magnifying glass icon and the word "Search". The main heading is "SALESDRIVE ASSESSMENT DASHBOARD". To the right of this heading are two tabs: "Projects" and "Profile". The main content area contains the text: "Please select upload file in CSV format. Click [here](#) to download sample file." Below this text is a file upload area with a "Choose File" button and the text "No file chosen". A large green arrow points upwards from the "Choose File" button towards the "here" link in the text above. At the bottom of the file upload area are two buttons: "Open File to Review Participants" and "Cancel".

Registering Participants *continued*

3. Create a column for the participant's information as follows (sample below):

- First Name
- Last Name
- Email
- Your Company Name
- Job Title
- Deadline

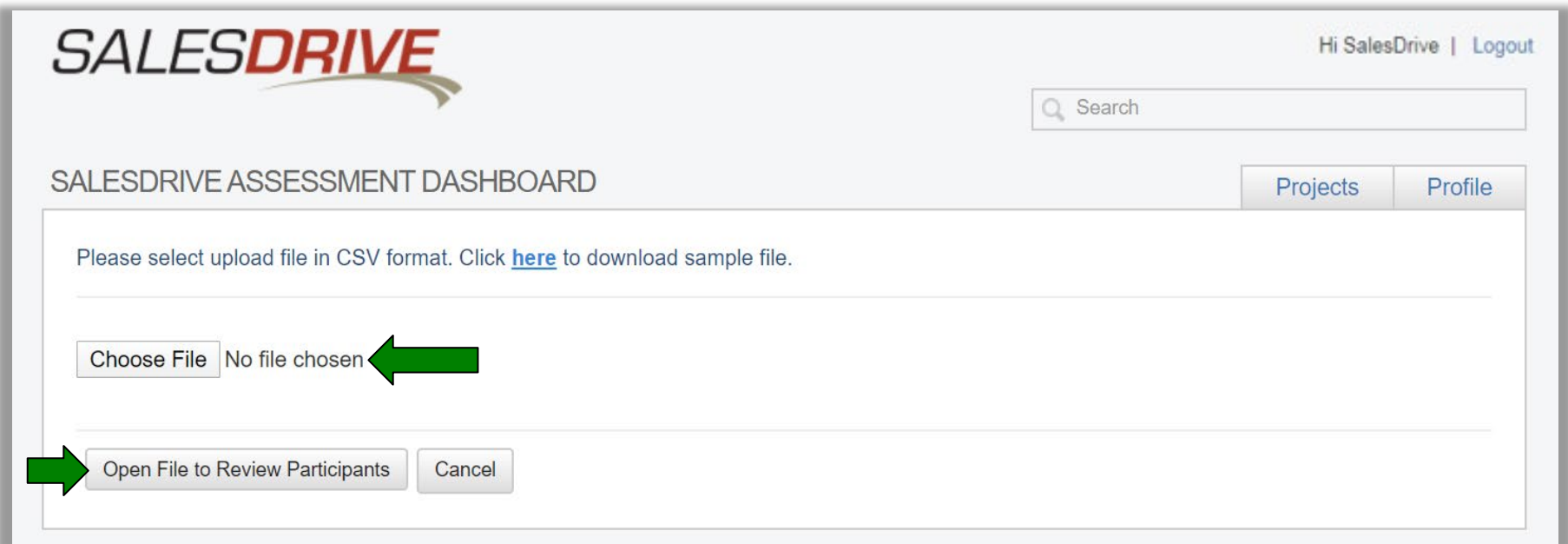
Note: The company field will populate into the email invitation. Use your full company name.

	A	B	C	D	E	F
1	First Name	Last Name	Email	Organization Name	Job Title	Deadline (MM/DD/YYYY)
2	Jon	Sample	jsample@test.com	SalesDrive	Sales Rep	4/1/2020
3	Sam	Test	sam@sampleco.com	SalesDrive	Sales Rep	4/1/2020
4	Tom	Example	tom.example@xyzinc.com	SalesDrive	Sales Rep	4/9/2020
5	Bob	Sample	bobsample@fake.com	SalesDrive	Sales Rep	10/14/2020
6	Mike	Trial	mike@mail.com	SalesDrive	Sales Rep	8/15/2020
7						

4. Add as many participants as you would like and Save the file.

Registering Participants *continued*

5. Once your participants have been saved to the file, click **Choose File** and select the file you want to upload.
6. Click **Open File to Review Participants** to review your file before sending an email invitation to your participants. Alternatively, click **Cancel** to abort.



The screenshot displays the SalesDrive Assessment Dashboard. At the top left is the SalesDrive logo. At the top right, it says "Hi SalesDrive | Logout". Below the logo is a search bar with a magnifying glass icon and the word "Search". The main heading is "SALESDRIVE ASSESSMENT DASHBOARD". To the right of this heading are two tabs: "Projects" and "Profile". Below the heading, there is a text instruction: "Please select upload file in CSV format. Click [here](#) to download sample file." Below this instruction is a file upload area. It contains a button labeled "Choose File" and the text "No file chosen". A green arrow points to the "Choose File" button. Below the file upload area are two buttons: "Open File to Review Participants" and "Cancel". A green arrow points to the "Open File to Review Participants" button.

Registering Participants *continued*

- Review participants to ensure there are no errors. Click **Upload Participants** to send an email invitation to each participant simultaneously. Alternatively, click **Cancel** to go back and upload a new file or abort.

SALESDRIVE ASSESSMENT DASHBOARD

Please review the participants.

First Name	Last Name	Email	Your Company	Job Title	Deadline (MM/DD/YYYY)	
Jon	Sample	jsample@test.com	SalesDrive	Sales Rep	4/1/2020	
Sam	Test	sam@sampleco.com	SalesDrive	Sales Rep	4/1/2020	
Tom	Example	tom.example@xyzinc.com	SalesDrive	Sales Rep	4/9/2020	
Bob	Sample	bobsample@fake.com	SalesDrive	Sales Rep	10/14/2020	
Mike	Trial	mike@mail.com	SalesDrive	Sales Rep	8/15/2020	

Upload Participants

Cancel



SalesDrive Assessment Email Invitation



SalesDrive LLC <salesdrive.support@quintelagroup.com>

Invitation from Sample Company to Complete an Assessment

To jenniesample@sample.com

Dear Jennie Sample,

You are being asked to complete an online assessment. Expect to spend approximately 20 minutes to complete the assessment.

It is best to complete this assessment in a single session. However, if you need to log out, you can log back in using the link provided and all of your completed answers will be saved.

PLEASE COMPLETE THE ASSESSMENT BY 12/31/2022.

Link to assessment:

<https://salesdrive.quintelagroup.com/a/529520e8-f0b2-414b-8308-8b2f2c255fcf/75bde148-8597-4f43-87af-58ae782e371f/>

For technical support, please contact salesdrive.support@quintelagroup.com.

Thank you so much.

Sample Company

Registering Participants *continued*

If your participant **does not get the email invitation**, hover your cursor over the participant's name on the dashboard. This launches the Tooltip box. To resend the link to the participant, right click **Link**. Copy link address and paste it in an email to the participant.

The screenshot shows the SALES DRIVE ASSESSMENT DASHBOARD. At the top left is the SALES DRIVE logo. At the top right, it says "Hi SalesDrive | Logout" and has a search bar. Below the logo is the title "SALESDRIVE ASSESSMENT DASHBOARD". There are tabs for "Projects" and "My Profile". On the left, there is a "Register New Participant" section with a "Candidates selected" list. A tooltip box is open over the first candidate, "Tom Sample". The tooltip contains "Participant Information" with fields for E-mail, Administrator, Job Title, Company, Deadline, Status, Date Added, and Date Completed. To the right of the tooltip is an "Assessments" section with a table showing "Behavioral Assessment" as "Not started" and a "Link" button. A green arrow points to the "Link" button. Below the tooltip is a table with columns for candidate details.

Participant E-mail:	mtoops@salesdrive.info
Administrator:	Demo, SalesDrive
Job Title:	Salesperson
Company:	SalesDrive, LLC
Deadline:	13 Nov 2017
Status:	Invited
Date Added:	06 Nov 2017
Date Completed:	

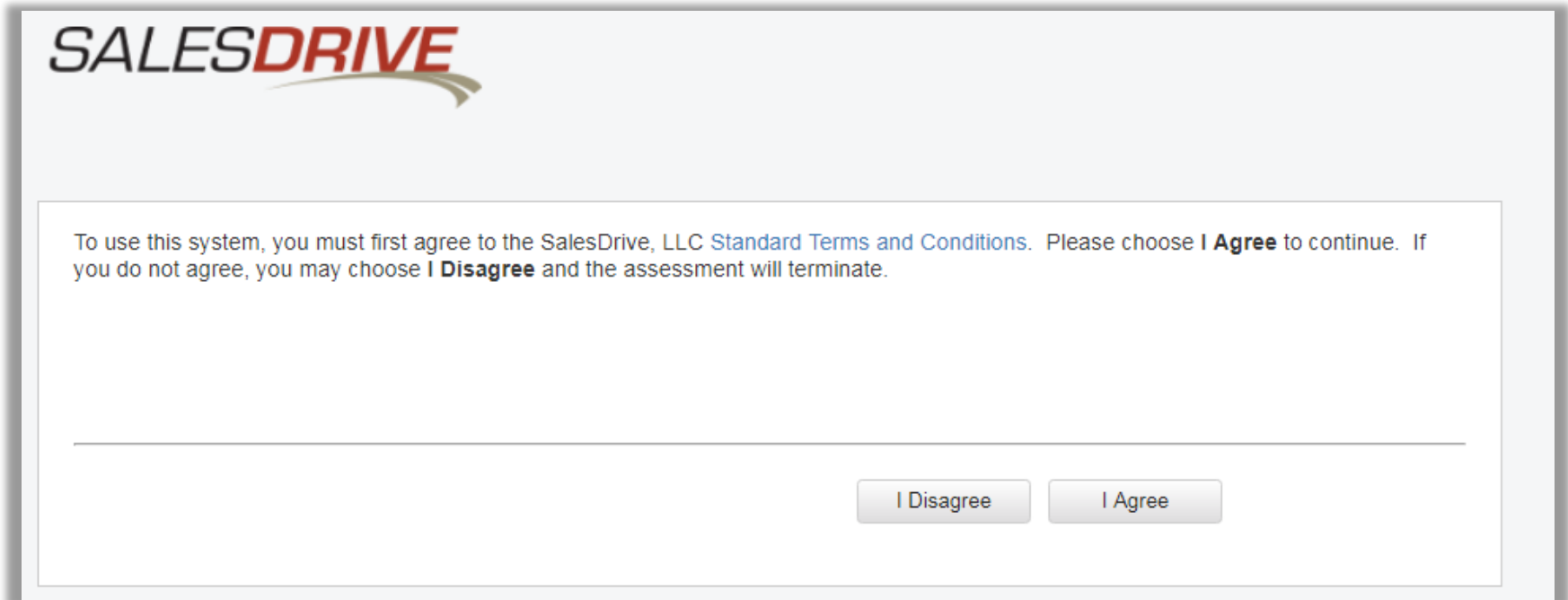
Behavioral Assessment:	Status:	Action:
Behavioral Assessment	Not started	Link

Reports:	Message:
Reports	Reports will be available once assessment is completed

ID	Name	Company	Job Title	Administrator	Deadline	Status	Actions
1	Sample						
2	Sample						
3	Sample, Tom	SalesDrive, LLC	Salesperson	Demo, SalesDrive	11/06/17	Invited	

Participant Experience

This section provides users with the participant's perspective when accessing the assessment. Participants will see the SalesDrive, LLC Standard Terms and Conditions page after clicking the URL in the assessment email invitation.



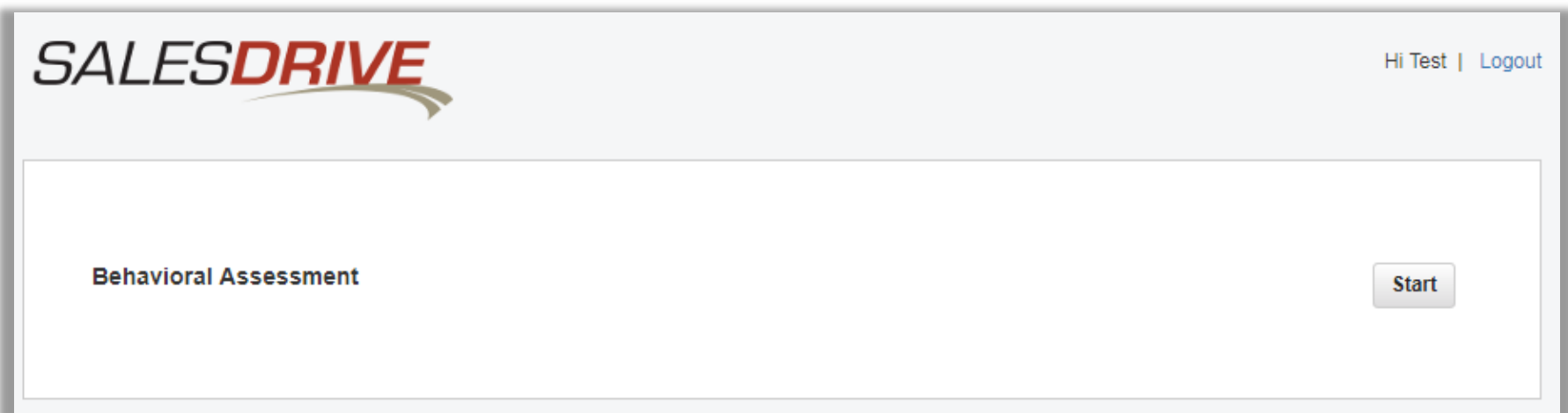
SALESDRIVE

To use this system, you must first agree to the SalesDrive, LLC [Standard Terms and Conditions](#). Please choose **I Agree** to continue. If you do not agree, you may choose **I Disagree** and the assessment will terminate.

Participant Experience *continued*

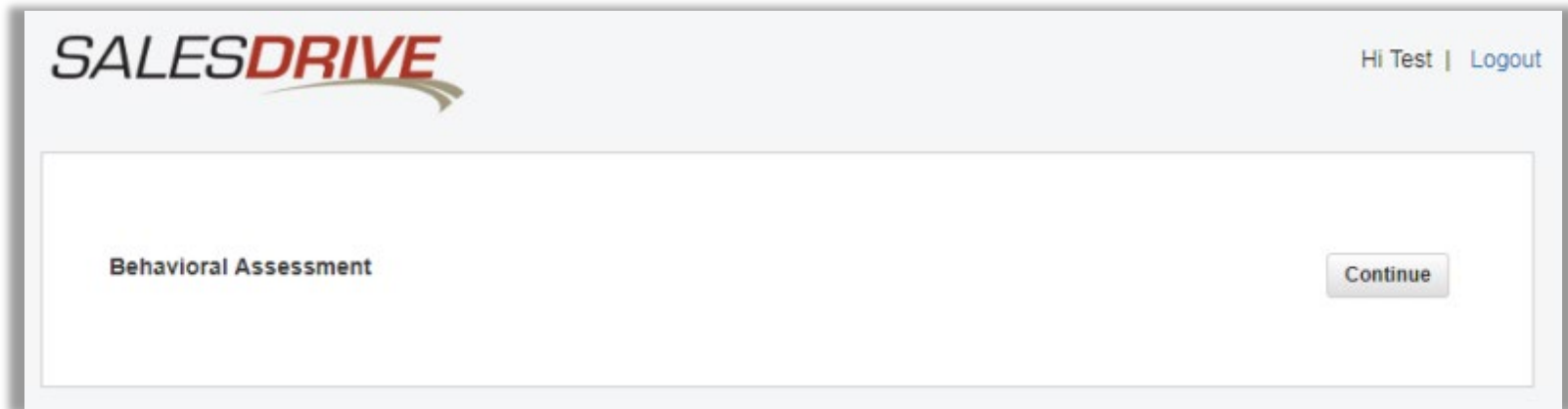
The participant will see the **Assessment Menu** after agreeing to the Standard Terms & Conditions.

Participants click **Start** to begin the assessment.



Participant Experience *continued*

The assessment allows participants to logout and log back in, therefore, participants will see a **Continue** option when logging back into the assessment menu.



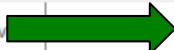

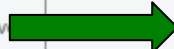
After completing the assessment the participant is redirected to the assessment menu. The assessment is marked as **Finished** after the assessment is completed.

Checking Assessment Status

The dashboard displays a status column for the assessment. There are 3 common status categories:

Status Categories:

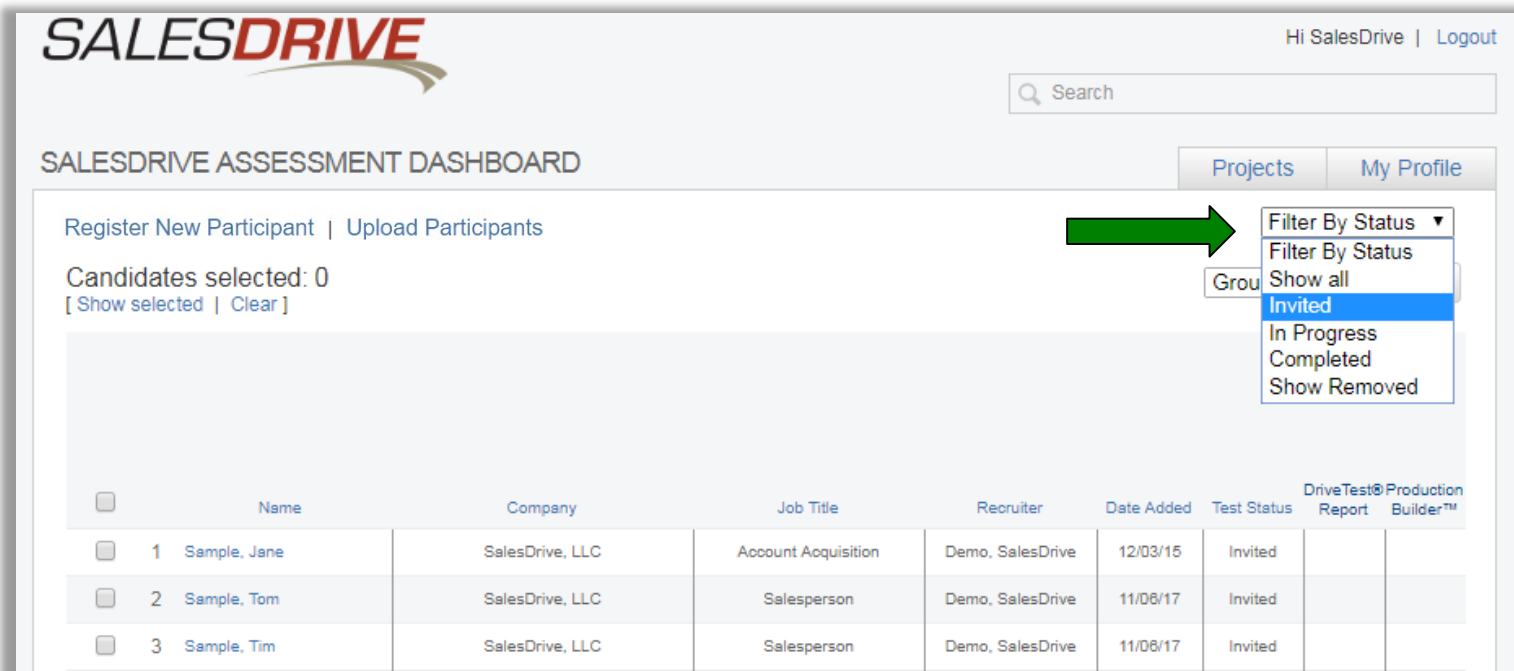
- **Invited** – Email invitation sent. Assessment not started.
- **In Progress** – Assessment started but not yet completed.
- **Date** – Assessment completed on displayed date.

<input checked="" type="checkbox"/>	Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest® Production Report	Builder™
<input type="checkbox"/>	1 Sample, Jill	SalesDrive, LLC	Outside Sales Rep	Demo, SalesDrive		11/06/17		
<input type="checkbox"/>	2 Sample, Bob	SalesDrive, LLC	Account Executive	Demo, SalesDrive		In Progress		
<input type="checkbox"/>	3 Sample, Tom	SalesDrive, LLC	Salesperson	Demo, SalesDrive		Invited		

Checking Assessment Status *continued*

The **Filter By Status** function allows users to view groups of participants according to their overall assessment status.

1. Under **Filter By Status**, click to view the dropdown menu.
2. Users can select to view all participants that are either **Invited**, **In Progress**, **Completed** or **Removed**. The **Show All** option resets the filter to display all participants in the dashboard.



The screenshot displays the SalesDrive Assessment Dashboard. At the top left is the SalesDrive logo. On the right, it says 'Hi SalesDrive | Logout'. Below the logo is a search bar. The main heading is 'SALESDRIVE ASSESSMENT DASHBOARD'. There are two tabs: 'Projects' and 'My Profile'. Below the tabs are links for 'Register New Participant' and 'Upload Participants'. A green arrow points to a 'Filter By Status' dropdown menu. The dropdown menu is open, showing options: 'Filter By Status', 'Filter By Status', 'Show all', 'Invited', 'In Progress', 'Completed', and 'Show Removed'. Below the menu is a table with columns: Name, Company, Job Title, Recruiter, Date Added, Test Status, DriveTest@Production Report, and Builder™. The table contains three rows of data.

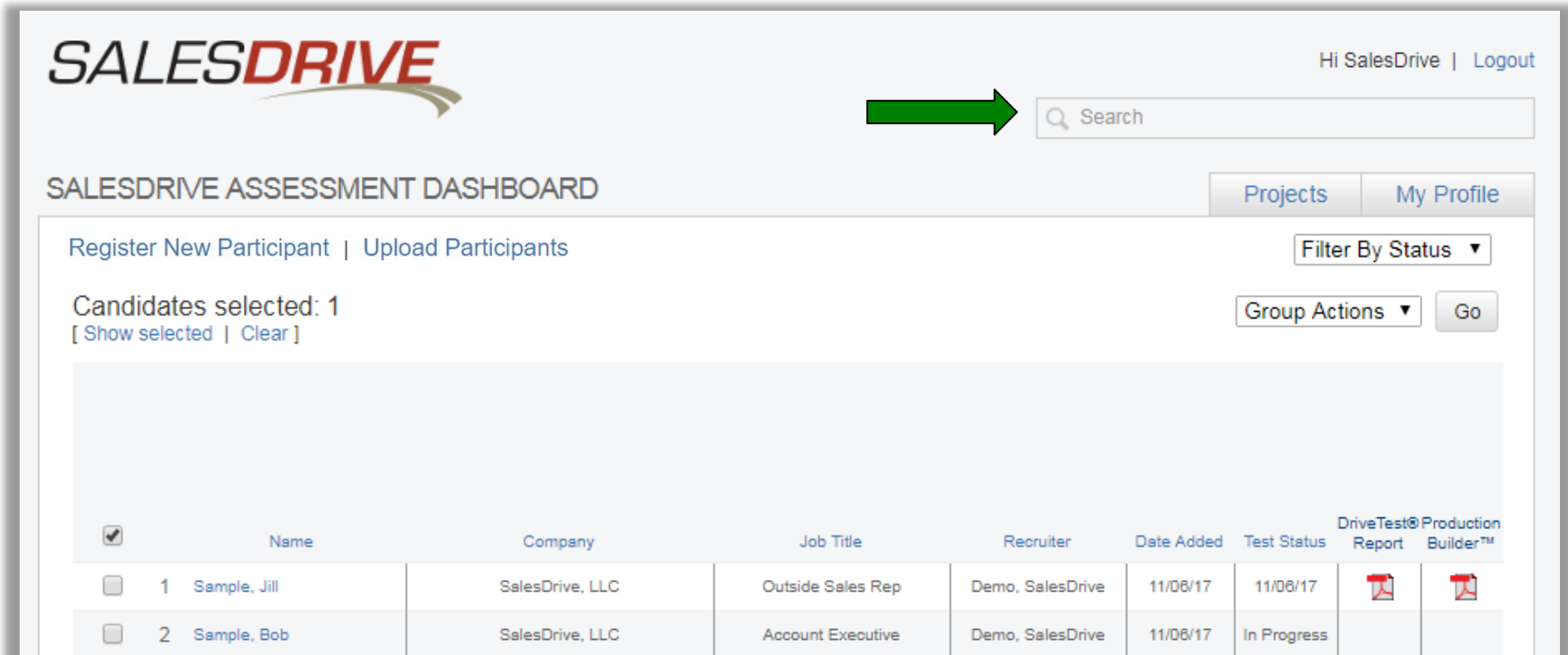
	Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest@Production Report	Builder™
<input type="checkbox"/>	1 Sample, Jane	SalesDrive, LLC	Account Acquisition	Demo, SalesDrive	12/03/15	Invited		
<input type="checkbox"/>	2 Sample, Tom	SalesDrive, LLC	Salesperson	Demo, SalesDrive	11/06/17	Invited		
<input type="checkbox"/>	3 Sample, Tim	SalesDrive, LLC	Salesperson	Demo, SalesDrive	11/06/17	Invited		

The 5 possible participant overall assessment status categories are defined below:

- **Invited** – An email invitation has been sent to the participant, but they have not started the assessment.
- **In Progress** – The participant has started the assessment.
- **Completed** – The participant has completed the assessment.
- **Show Removed** – When a participant is removed, their assessment link is deactivated and they are no longer visible on the dashboard. This option allows users to view only removed participants.
- **Show All** – This option resets the filter and shows all active participants.

Searching for Participants

To locate a specific participant, enter the participant's first name, last name or email address into the field designated as **Search** and click **Enter**. This performs a search for all participants that fit the entered criteria.



The screenshot displays the SalesDrive Assessment Dashboard. At the top left is the SalesDrive logo. On the top right, it says "Hi SalesDrive | Logout". A green arrow points to a search bar labeled "Search". Below the search bar is the "SALESDRIVE ASSESSMENT DASHBOARD" header. On the left, there are links for "Register New Participant" and "Upload Participants". On the right, there are buttons for "Projects" and "My Profile", and a "Filter By Status" dropdown. Below these, it shows "Candidates selected: 1" with links for "[Show selected | Clear]". A "Group Actions" dropdown and a "Go" button are also present. The main content is a table with the following columns: Name, Company, Job Title, Recruiter, Date Added, Test Status, DriveTest® Report, and Production Builder™. The table contains two rows of data.

	Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest® Report	Production Builder™
<input checked="" type="checkbox"/>								
<input type="checkbox"/>	1 Sample, Jill	SalesDrive, LLC	Outside Sales Rep	Demo, SalesDrive	11/06/17	11/06/17		
<input type="checkbox"/>	2 Sample, Bob	SalesDrive, LLC	Account Executive	Demo, SalesDrive	11/06/17	In Progress		

Updating Participant Information

To update participant information, hover your cursor over the participant's name on the dashboard. This launches the **Tooltip**, which displays all participant information provided at the time of registration. To update this information, click **Edit**.

The screenshot shows the SALES DRIVE ASSESSMENT DASHBOARD. At the top left is the SALES DRIVE logo. At the top right, it says "Hi SalesDrive | Logout". Below the logo is a search bar. The main heading is "SALESDRIVE ASSESSMENT DASHBOARD". There are tabs for "Projects" and "My Profile". A "Register New Participant" link is visible. A "Candidates selected" section shows a list of participants with checkboxes. A tooltip for "Tom Sample" is open, displaying the following information:

Tom Sample	
Participant Information	edit
Participant E-mail:	mtoops@salesdrive.info
Administrator:	Demo, SalesDrive
Job Title:	Salesperson
Company:	SalesDrive, LLC
Deadline:	13 Nov 2017
Status:	Invited
Date Added:	08 Nov 2017
Date Completed:	

Below the tooltip, a table shows the participant's details in a grid format:

<input checked="" type="checkbox"/>	1	Sample, Tom	SalesDrive, LLC	Salesperson	Demo, SalesDrive	11/08/17	Invited	
-------------------------------------	---	-------------	-----------------	-------------	------------------	----------	---------	--

Updating Participant Information *continued* SALES DRIVE LLC

NEVER HIRE A BAD SALESPERSON AGAIN

1. Enter updated participant information.
2. Click **Update** to save the new information. *“Participant profile has been successfully updated”* message will be displayed at the top of the form.
3. Click **Return to Dashboard** after the profile has been successfully updated.

Note: The invitation email will not be resent. To send the assessment to a new email, please see page 30.

PARTICIPANT PROFILE

Note: fields marked with * are required.

First Name: *	<input type="text" value="Jane"/>
Last Name: *	<input type="text" value="Sample"/>
Email: *	<input type="text" value="jane@xyz.com"/>
Your Company: *	<input type="text" value="SalesDrive, LLC"/>
Job Title: *	<input type="text" value="Account Manager"/>
Deadline (MM/DD/YYYY): *	<input type="text" value="12/31/2020"/>

Changing Deadline Dates

- Update deadline date in the participant profile and click **Update**.
- All future reminders for this participant will include the updated deadline date.

Note: Assessments will remain active beyond the deadline date.

To deactivate an assessment, see [page 31](#).

PARTICIPANT PROFILE

Participant profile has been successfully updated.

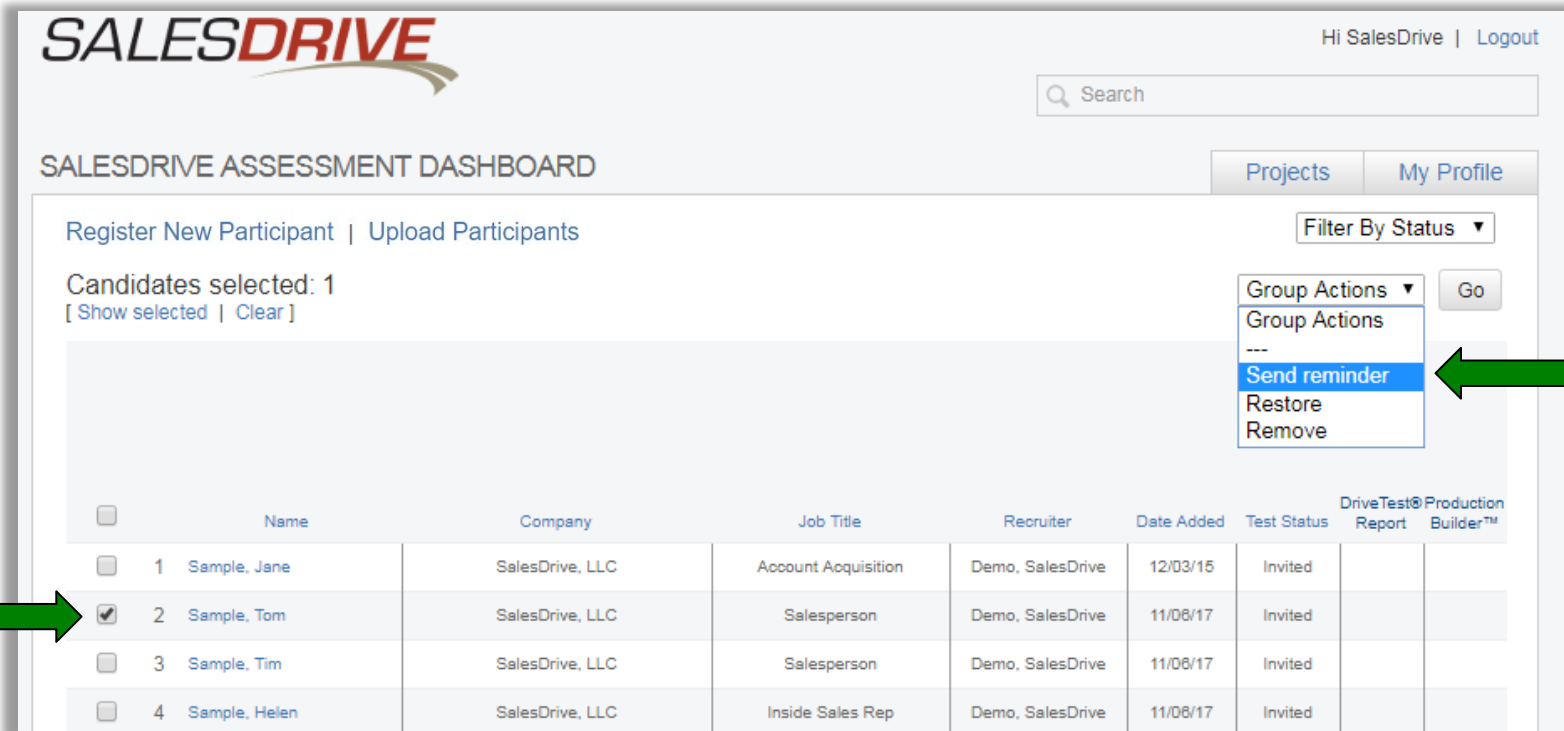
Note: fields marked with * are required.

First Name: *	Jane
Last Name: *	Sample
Email: *	jane@xyz.com
Your Company: *	SalesDrive, LLC
Job Title: *	Account Manager
Deadline (MM/DD/YYYY): *	12/31/2020

Sending Reminders

To send reminders to participants:

1. Click on the boxes next to all participants' names for whom a reminder should be sent.
2. Under **Group Actions**, select **Send Reminder** and click **Go**.



The screenshot shows the SalesDrive Assessment Dashboard. At the top left is the SalesDrive logo. On the right, it says 'Hi SalesDrive | Logout'. Below the logo is a search bar. The main heading is 'SALESDRIVE ASSESSMENT DASHBOARD'. There are tabs for 'Projects' and 'My Profile'. Below the dashboard heading, there are links for 'Register New Participant' and 'Upload Participants'. A 'Filter By Status' dropdown is visible. Below that, it says 'Candidates selected: 1' with links for '[Show selected | Clear]'. A 'Group Actions' dropdown menu is open, showing options: 'Group Actions', '---', 'Send reminder' (highlighted with a green arrow), 'Restore', and 'Remove'. A 'Go' button is next to the dropdown. Below the menu is a table of candidates. A green arrow points to the checkbox for the second candidate, 'Sample, Tom', which is checked.

	Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest® Report	Production Builder™
<input type="checkbox"/>	1 Sample, Jane	SalesDrive, LLC	Account Acquisition	Demo, SalesDrive	12/03/15	Invited		
<input checked="" type="checkbox"/>	2 Sample, Tom	SalesDrive, LLC	Salesperson	Demo, SalesDrive	11/06/17	Invited		
<input type="checkbox"/>	3 Sample, Tim	SalesDrive, LLC	Salesperson	Demo, SalesDrive	11/06/17	Invited		
<input type="checkbox"/>	4 Sample, Helen	SalesDrive, LLC	Inside Sales Rep	Demo, SalesDrive	11/06/17	Invited		

(Note: To clear selections, click “Clear” under Candidates Selected)

Sending Reminders *continued*

To select all participants, click the box at the top left of the Name column.

The screenshot shows the SALES DRIVE ASSESSMENT DASHBOARD. At the top left is the SALES DRIVE logo. To the right, it says "Hi SalesDrive | Logout". Below the logo is a search bar. The main heading is "SALESDRIVE ASSESSMENT DASHBOARD". On the right side, there are buttons for "Projects" and "My Profile". Below the heading, there are links for "Register New Participant" and "Upload Participants". A "Filter By Status" dropdown menu is visible. Below that, it says "Candidates selected: 10" with links for "[Show selected | Clear]". A "Group Actions" dropdown menu is open, showing options: "Group Actions", "Send reminder" (highlighted in blue), "Restore", and "Remove". A "Go" button is next to it. Below the menu is a table with columns: Name, Company, Job Title, Recruiter, Date Added, Test Status, DriveTest® Report, and Production Builder™. The first row of the table has a checkbox in the Name column highlighted with a green box. The table contains 8 rows of candidate data.

	Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest® Report	Production Builder™
<input checked="" type="checkbox"/>	1 Sample, Jane	SalesDrive, LLC	Account Acquisition	Demo, SalesDrive	12/03/15	Invited		
<input checked="" type="checkbox"/>	2 Sample, Tom	SalesDrive, LLC	Salesperson	Demo, SalesDrive	11/06/17	Invited		
<input checked="" type="checkbox"/>	3 Sample, Tim	SalesDrive, LLC	Salesperson	Demo, SalesDrive	11/06/17	Invited		
<input checked="" type="checkbox"/>	4 Sample, Helen	SalesDrive, LLC	Inside Sales Rep	Demo, SalesDrive	11/06/17	Invited		
<input checked="" type="checkbox"/>	5 Sample, Sarah	SalesDrive, LLC	Sales	Demo, SalesDrive	11/06/17	Invited		
<input checked="" type="checkbox"/>	6 Sample, Sam	SalesDrive, LLC	Inside Sales Representative	Demo, SalesDrive	12/03/15	In Progress		
<input checked="" type="checkbox"/>	7 Team, Support	supportteam	sales	Demo, SalesDrive	12/17/15	In Progress		
<input checked="" type="checkbox"/>	8 Sample, Bob	SalesDrive, LLC	Account Executive	Demo, SalesDrive	11/06/17	In Progress		

Sending Reminders *continued*

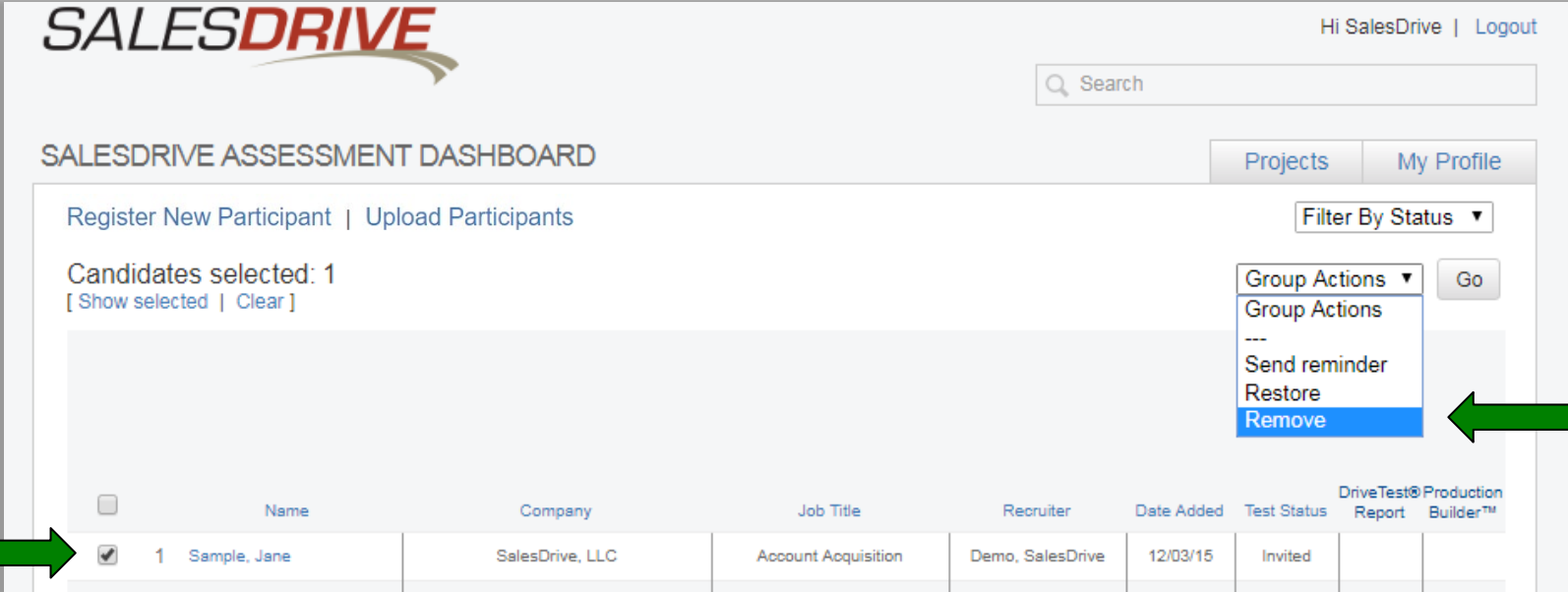
To send a reminder to a group of participants by overall status:

1. Under **Filter By Status**, click to view the dropdown menu.
2. Select to view all participants by **Invited**.
3. Click the box to the left of the column header “Name”. All boxes for the visible participants should be selected.
4. Under **Group Actions**, select **Send Reminder** and click **Go**.
5. To clear selections, click “Clear”.
6. Under **Filter By Status**, click to view the dropdown menu and select **Show All**.
7. Repeat the steps 1 through 6 for the **In Progress** participants.

Removing Participants

To remove a participant:

1. Click on the box next to the participant's name for whom you wish to remove. Removing a participant will **deactivate** the assessment link, removing access to the assessment.
2. Under **Group Actions**, select **Remove** and click **Go**.



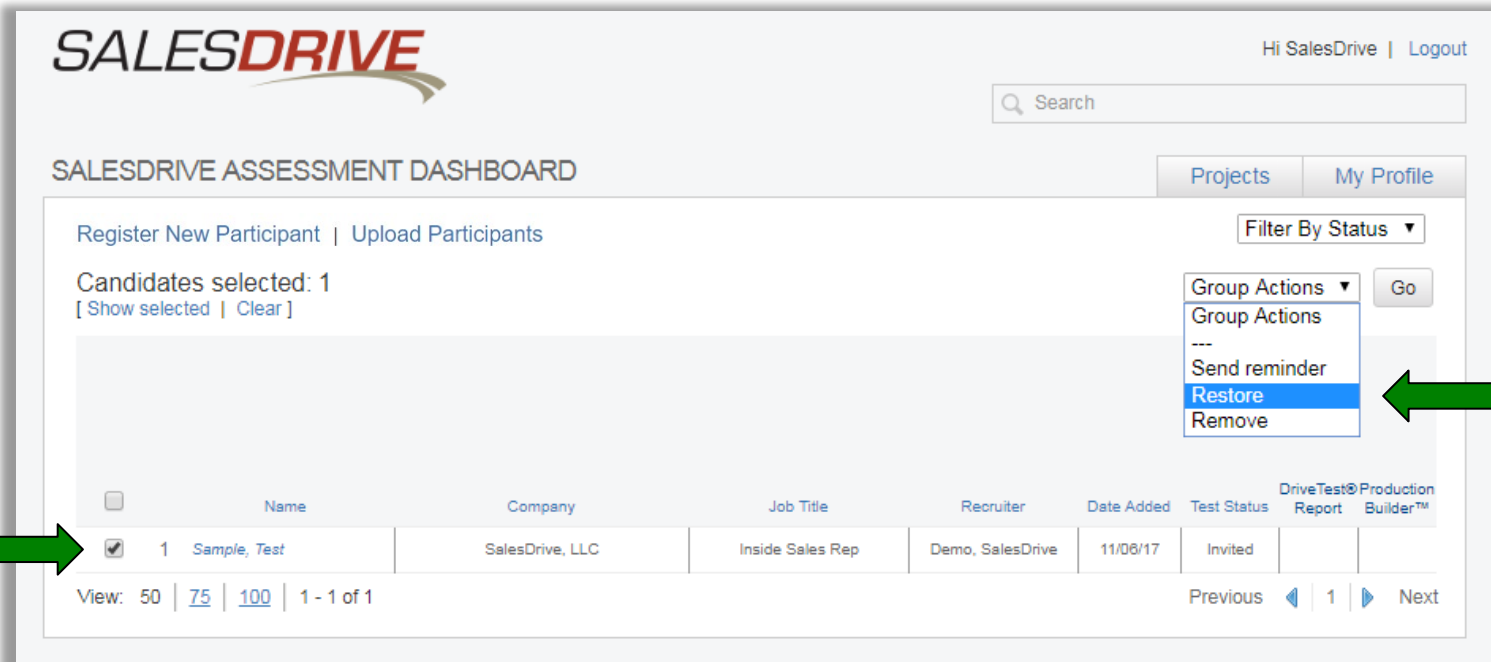
The screenshot displays the SalesDrive Assessment Dashboard. At the top left is the SalesDrive logo. On the right, it says "Hi SalesDrive | Logout". Below the logo is a search bar. The main heading is "SALESDRIVE ASSESSMENT DASHBOARD". There are tabs for "Projects" and "My Profile". Below these are links for "Register New Participant" and "Upload Participants". A "Filter By Status" dropdown is visible. A "Group Actions" dropdown menu is open, showing options: "Group Actions", "...", "Send reminder", "Restore", and "Remove". A green arrow points to the "Remove" option. Below the menu is a "Go" button. A table lists participants with columns: Name, Company, Job Title, Recruiter, Date Added, Test Status, DriveTest Report, and Production Builder. The first row shows a participant named "Sample, Jane" with a checked checkbox in the first column. A green arrow points to this checkbox.

	Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest Report	Production Builder™
<input checked="" type="checkbox"/>	1 Sample, Jane	SalesDrive, LLC	Account Acquisition	Demo, SalesDrive	12/03/15	Invited		

Restoring Participants

To restore a participant:

1. Under **Filter By Status**, select **Show Removed**.
2. Click on the box next to the participant's name for whom you wish to restore. Restoring a participant will **reactivate** the assessment link, granting access to the assessment again.
3. Under **Group Actions**, select **Restore** and click **Go**.

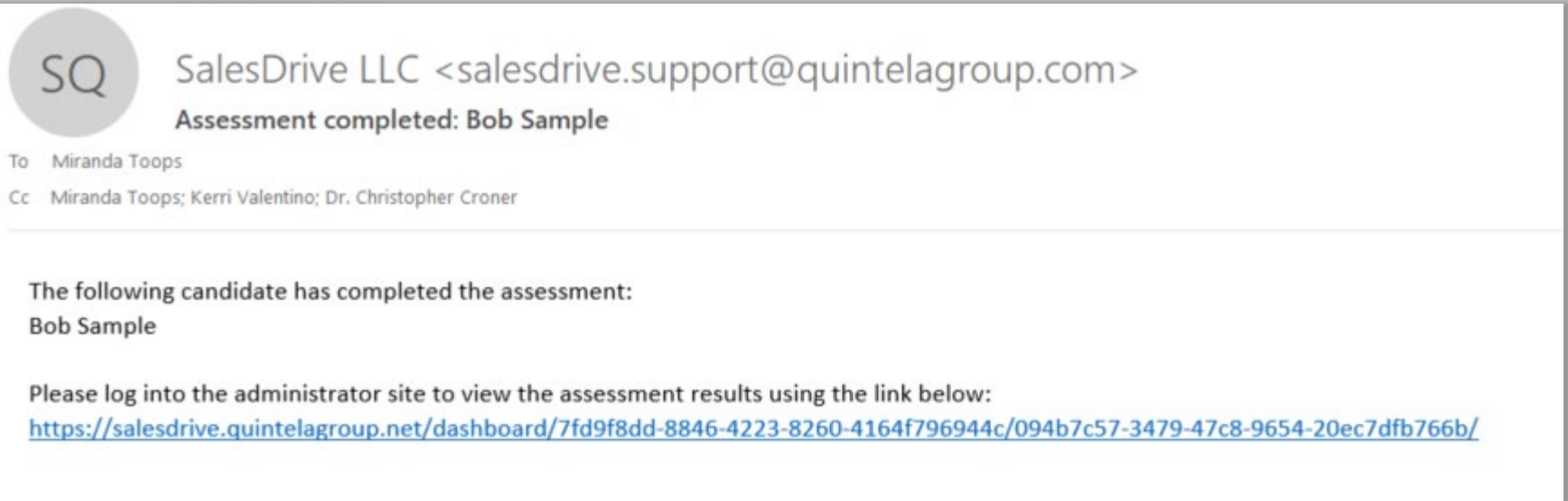


The screenshot shows the SalesDrive Assessment Dashboard. At the top left is the SalesDrive logo. On the right, it says "Hi SalesDrive | Logout". Below the logo is a search bar. The main heading is "SALESDRIVE ASSESSMENT DASHBOARD". There are tabs for "Projects" and "My Profile". Below the dashboard heading, there are links for "Register New Participant" and "Upload Participants". A summary shows "Candidates selected: 1" with links for "Show selected" and "Clear". A "Filter By Status" dropdown is set to "Show Removed". A "Group Actions" dropdown menu is open, showing options: "Group Actions", "Send reminder", "Restore" (highlighted with a green arrow), and "Remove". A "Go" button is next to the dropdown. Below the menu is a table with columns: Name, Company, Job Title, Recruiter, Date Added, Test Status, DriveTest Report, and Production Builder. The table has one row with a checked checkbox in the first column and the following data: "1 Sample, Test", "SalesDrive, LLC", "Inside Sales Rep", "Demo, SalesDrive", "11/06/17", "Invited", and empty cells for the last two columns. A green arrow points to the checkbox. At the bottom, there are pagination controls: "View: 50 | 75 | 100 | 1 - 1 of 1" and "Previous | 1 | Next".

Accessing Reports

A notification email is sent to the recruiter who set up the assessment after the participant completes the assessment. This email contains a link to view the reports.

All reports can be viewed on the dashboard by all users.



Accessing Reports *continued*

The DriveTest® Report (for sales interviewing and hiring) & Production Builder™ Report (for training/development of new and current salespeople) can be accessed by clicking the PDF icons in the two far right columns on the SalesDrive Assessment Dashboard.

The screenshot shows the SalesDrive Assessment Dashboard. At the top left is the SalesDrive logo. On the right, it says "Hi SalesDrive | Logout". Below the logo is a search bar. The main heading is "SALESDRIVE ASSESSMENT DASHBOARD". There are buttons for "Projects" and "My Profile". Below that, there are links for "Register New Participant" and "Upload Participants", and a "Filter By Status" dropdown. It shows "Candidates selected: 1" with links for "Show selected" and "Clear". There is also a "Group Actions" dropdown and a "Go" button. The main content is a table with the following columns: Name, Company, Job Title, Recruiter, Date Added, Test Status, DriveTest® Report, and Production Builder™. A green arrow points to the PDF icon in the DriveTest® Report column for the first candidate.

<input checked="" type="checkbox"/>	Name	Company	Job Title	Recruiter	Date Added	Test Status	DriveTest® Report	Production Builder™
<input type="checkbox"/>	9 Sample, John	SalesDrive, LLC	Account Specialist	Demo, SalesDrive				
<input type="checkbox"/>	10 Sample, Jill	SalesDrive, LLC	Outside Sales Rep	Demo, SalesDrive	11/08/17	11/06/17		

Contact Technical Support

If dashboard users or participants attempting to complete the assessment require technical assistance, please email support at support@salesdrivetest.com.

If you would like to add additional users to your account, please send the first and last name(s) and email(s) to Miranda Pillot at mpillot@salesdrivetest.com for set up.

We appreciate the opportunity to be of service!