

Creating your account

1. Go to <https://www.team-performance-scan.com/pricing/>
2. Scroll down to 'New to TPS? Get started in 4 simple steps'
3. Click 'CREATE ACCOUNT' button
4. Select I am a new customer
5. Enter a username, organisation name, contact details and password
6. Click 
7. Enter your address details and click 
8. Purchase your credits (Refer to 'Buying credits' section below for instructions to purchase credits) or select Buy later to be taken to your account homepage

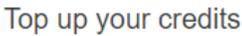
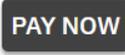
Logging in to your User Console

1. Go to www.team-performance-scan.com
2. Click  (top right-hand corner of the screen)
3. Enter your username and password and click 
4. Ensure all account details are correct:
 - Organisation name
 - Contact name
 - Contact email (*NB: This email address receives an email notification when all participants requested to complete an assessment have done so*)

Adding/removing your corporate logo

1. Logged into your User Console page, at the top of the page click on **Manage Account** 
2. Click on the yellow pencil symbol next to **Logo**
3. Click '**Choose file**' button, select your logo file from your computer (.png, .jpg or .jpeg format), then click '**UPDATE**' button (*NB: To remove an existing logo entirely without replacing it, click 'UPDATE' without having selected a file*)

Buying credits

1. Logged into your User Console page, scroll down to → 
2. Enter the number you wish to buy (1 credit = 1 participant) 
3. Click 
4. You will be prompted to select the address linked to your debit or credit card or add a new address
5. Click 
6. Enter your card details and click 

Creating an assessment

1. Logged into your User Console page, scroll down to → 
2. Enter organisation and team and click **'CREATE'**
(NB: The organisation and team you enter here will be available from a dropdown menu the next time you create an assessment)
3. Enter the email address of the team leader and at least 3 team member email addresses
(NB: See below for alternative CSV upload option), and click **'NEXT'**
4. You now have the option of entering some free text to be included on the invite emails to participants. Ensure the list of participants is correct and click **'SEND'** – this will trigger the system to generate email invites to the participants
(NB: The point you click 'SEND' is the point at which the credits for the relevant number of participants will be deducted from your account)

CSV upload of team member email addresses

1. When creating an assessment and on the 'Add participants' screen, click **'CLICK HERE FOR CSV UPLOAD OPTION'**
2. Click **'DOWNLOAD'** to download a template file to complete
3. Type or paste in team member email addresses where indicated in the template file, and save the file on your computer
4. Click **'Choose file'** button, select the file you have just saved, then click **'UPLOAD'** button
5. Review the imported addresses, make any necessary amendments and click **'NEXT'** when ready

Continuing a partially created assessment

1. If you abandon the assessment creation process (say to add more credits to your account to enable you to add more team members than you would otherwise have been able to), the data you entered up to the last screen change will have been saved
2. You can retrieve the partially created assessment to continue creating it by clicking the relevant link in the *Partially-created assessments* section in the User Console
(NB: This section does not show if there are no partially created assessments in progress)

Deleting a partially created assessment

1. Click the relevant link under the *Partially-created assessments* section in your User Console
2. Click the 'Delete this partially-created assessment' link at the bottom
3. Click 'OK' to confirm when prompted

Adding and removing participants to/from an existing assessment

1. Logged into your User Console page, scroll down to the *Issued assessments* section at the bottom
2. Click on the relevant test to highlight it
3. Click the '**MANAGE**' button
4. To add a new participant, click  **+ Add another**
5. To remove an incomplete participant, click the  symbol next to the relevant email
NB: Participants who have already completed the survey cannot be removed
6. Click '**PROCESS**' – this will deduct the credits for any new participants and add back the credits for any removed participants

Sending a reminder to incomplete participants

1. Logged into your User Console page, scroll down to the *Issued assessments* section at the bottom
2. Click on the relevant test to highlight it
3. Click the **'MANAGE'** button
4. Click  **Create reminder**
5. This will create a draft email to incomplete participants, which you can edit before sending. You can also select whether to send the reminder to all participants or just specific ones.

Downloading test results PDF *(Requires at least 3 team members to have completed)*

1. Logged into your User Console page, scroll down to the *Issued assessments* section at the bottom
2. Click on the relevant assessment to highlight it
3. Click **'DOWNLOAD PDF'** button to top left hand side of the test list
NB: The report typically takes around 30 seconds to generate

Changing your password

1. Logged into your User Console page, at the top of the page click on **Manage Account**  ▾
2. Click on the yellow pencil symbol next to **Password**
3. Follow prompts to change your password
NB: You can also change your password via the 'Forgotten password?' link on the login screen

Changing contact details

1. Logged into your User Console page, at the top of the page click on **Manage Account**  ▾
2. Click on yellow pencil symbol next to **Organisation** or **Contact Name** or **Contact Email**
3. Follow the prompts to change your details