



USING YOUR TRUITY PRO ACCOUNT

Welcome to the Truity platform and thank you for entrusting us to help you assess your team! We'd like to share a few tips to help you get started quickly and easily.

Quick Start Guide to Testing Clients

You can begin testing clients right away. To do so:

1. Visit Truity.com or TypeFinder.com and log in using the username and password you created during checkout.
2. Find the link at the top right of the screen labeled **Manage Clients** and click it.
3. On the Manage Clients page, you will see a form to add a new client. Enter the client's name and email address and click **Add**.
4. The client's name now appears on the list of clients, and you will see a button marked **Send Test** next to their name.
5. Click Send Test to open a window where you can select which test you'd like to send and customize the email that goes out to your client.

Note: The email to your client includes the code **%login_and_test_link%**. When customizing the email, do not delete this code! When the email is sent, this code is replaced by an active link that your client will use to access the test.

Sending a Test to Yourself

If you are part of the group that will be taking the assessment, you can use your Manage Clients page to assign a test to yourself.

Simply add your own name and email to your client list, but be sure to use the same email that you did when you first signed up. This way you will not end up with two accounts in the system, which generally causes confusion.

Testing Large Groups with the Client Code Feature

The **Client Code** feature allows you to **test large groups** without having to enter each of their names and emails individually. Instead, you receive a link and code that you can



then provide to your entire group. They need only follow the link and enter the code to access the tests you have purchased for them.

To enable and use the Client Code:

1. Visit Truity.com or TypeFinder.com and log in using the username and password you created during checkout.
2. Click on your username in the top right corner of the page to navigate to your account settings.
3. On the **Account Details** page, scroll down until you see the section called **Client Code Settings**. Click Enable, and then scroll to the end of the page and click Save.
4. When the page reloads, return to the Client Code settings area. Now you will see the information that you need to give your clients.
5. Give each of your clients the **link** shown in the Client Code settings area, along with the appropriate **code** for the test you want them to take.
6. When clients use the link and code to log in, they will appear on your client list. When they complete the test, you will see a button next to their name that allows you to view their results.

Note: When you use the Client Code, anyone with your link and the code can use them to take tests and deduct credits from your account, so please do not post this information in a public place, like on your website! If your code is misused, please let us know. We are happy to reset your codes and credit you for the tests that were not authorized.

Sending Two Tests to One Client

If you wish to have a client take more than one assessment you have two options. You may send the tests one at a time, or you can use the Client Code feature to send both tests at once.

To send tests **one at a time**:

1. Send the client the first test. When they have completed it, visit your Manage Clients page and click on the client's name. This will open up the Client Detail page.
2. On the Client Detail page, look for Actions: Retest. This will open a new email box where you may send a new test.

To use the Client Code feature to send **two tests at once**:

1. Follow the instructions above under "Testing Large Groups" to enable your **Client Code**.



2. Provide your client with the link and codes for each of the tests you would like them to take.

Note: When a client takes more than one test, only their most recent results will show up on your main Manage Clients page. To access older results, click their name to view the Client Detail page.

3. Instruct your client to visit the link and then enter the first code to take the first test. When that test is complete, they should return to the link and enter the second code.

Troubleshooting Common Problems

We have made every effort to make our system user-friendly, but there are a few things that sometimes go wrong. Here are some common issues and how to solve them. Of course, please feel free to get in touch with us at anytime for help, at help@truity.com.

Your clients aren't receiving your emails

This is most common with corporate email systems that may block emails coming from the truity.com domain. If you are emailing a group within a corporate email system and the messages simply aren't arriving, you can try asking your IT department to unblock the messages.

If that is not an option, we recommend using the Client Code feature (see "Testing A Large Group" above) instead. If you have already registered clients who cannot receive your emails, you can still switch over to the Client Code method of sending tests. You will first need to cancel any tests assigned to clients who will be using the Client Code instead. To do so, click Cancel Test next to the name of these clients. Now your test credits are available to Client Code users.

Your clients are being asked to pay for the test

If your clients are logged in and using the credit you have assigned to them, they should not see any payment information. If they are being asked to pay for the test, something has gone wrong.

The most common reason for this issue is that the client thinks they are logged in to the site, but they actually are not. If they are not logged in, they will not be able to access the test assigned to their account. Please have your client check that they can see their



username in the top right corner of the site throughout the testing process. If testing has been completed, the client can check to see if the testing session was recorded to their account by following these instructions:

1. Visit Truity.com or TypeFinder.com and log in using the username and password they created.
2. Click the username in the top right corner of the page.
3. Click the My Test Results tab.
4. Check to see if the test is listed on the test results page.

If the test is listed under My Test Results, but the client was not able to view their results without paying, please contact us. We will be able to enable the results so your client and you can view them.

Getting More Help

We are always happy to talk you through the testing system and answer any questions you may have. If you are unsure of how to do what you need to, please let us know so we can help!

You can contact us anytime at help@truity.com. We look forward to serving you!