# Exam**FX**
*Success Starts Here*
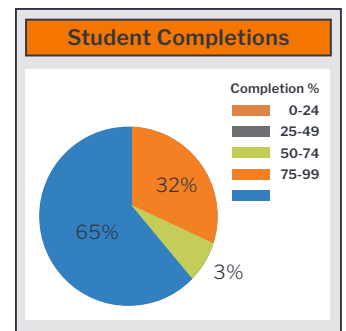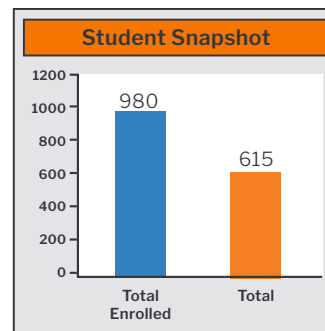
**LEARNING SOLUTIONS**

# Manager Tracking

Tracking Candidates on their Path to Success

Your candidates' prelicensing performance is essential on their path to becoming a licensed agent. Our Manager Tracking platform allows you the flexibility of monitoring individual study progression all from one place.

## Manager Dashboard

Our Manager Dashboard brings each learners' progress to life, giving you a snapshot view of candidate progress. Real-time dashboards increase transparency and accountability, helping motivate your team. If you are monitoring the performance of a team of managers, we can help by providing team overviews for increased visibility. You can easily compare which managers are enrolling, how many of their learners are actively engaged in their training and the overall percentage of who has successfully completed their studies – for each of your management teams. Candidates will be prepared quicker and start producing in no time.

**Student Snapshot**

| | |
|---|---|
| 980 | Total Enrolled |
| 615 | Total |

**Student Completions**

Completion %
- 0-24
- 25-49
- 50-74
- 75-99

65% | 32% | 3%

## Custom Reports

Our custom reporting allows you to select which metrics are most important to you and your firm. Design and download your reports at any time.

**Step 1 - Select Filters:**
- ◉ StudentDetail
- ○ ManagerSummary

**Managers:**

*Ctrl + Click to select multiple names*

**Registration Date:**
Start: 12/13/2016   End: 03/13/2017

**Students studying for:**
- ☑ Select All
- ☑ Health   ☑ Life & Health
- ☑ Life   ☑ Code & Ethics

**Student status:**
- ☑ Select All
- ☑ Active   ☑ inactive

**Student progress:**
- ☑ Select All
- ☑ Superior (Green)   ☑ At Risk (Red)
- ☑ On Track (Blue)

**Step 2 - Select Output:**

**Manager Info:**
- ☑ Select All
  - ☑ First Name
  - ☑ Last Name
  - ☑ Phone
  - ☑ Email

**Student Info:**
- ☑ Select All
  - ☑ First Name
  - ☑ Last Name
  - ☑ Resident Address
  - ☑ Resident City
  - ☑ Resident State
  - ☑ Resident Zip
  - ☑ Phone
  - ☑ Email

**Course Info:**
- ☑ Select All
  - ☑ Course Name
  - ☑ Student Status
  - ☑ Student Progress
  - ☑ Last Access Date
  - ☑ Usage
  - ☑ Best SYE Score
  - ☑ Average SYE Score
  - ☑ Latest SYE Score
  - ☑ Best Guaranteed Exam Score
  - ☑ Registration date

## Automated Emails

We also give you the option to receive daily summary emails of your candidates' study activity. With one glance, you are provided with enough information to know if your candidates are ready to take their exam. Want to know how your candidates are doing? See instantly which candidates have progressed through the training by who is colored green.

**Manager Activity Summary**

Manager Activity Summary

○ TrackingNoReply@ExamFX.com

Manager Activity Summary - March 7, 2017 0303.html (75.9 KB)  [Preview]

**Manager Activity Summary**
* Students highlighted have had a change in course progress since the last report. Progress area is highlighted in **GREEN**.
* Test Ready students are those students who have scored 80% or higher on either their practice or guarantee exam.

| Manager | State | Enrolled Last 30 Days | Active Last 10 Days | Total Students | % Complete |
|---|---|---|---|---|---|
| John Doe | CA | 10 | 17 | 19 | 53% |

| Name | Phone | Email | State | Exam | % Complete | Chapters | First Log On | Last Log On | Time In Course | Best Practice Exam | Pass Guarantee Exam | Test Ready? |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| John Doe | | | CA | Life and Health | 100 % | 16 of 16 | 01/18/2017 | 03/02/2017 | 47:32 | 62 | N/A | N |
| John Doe | | | CA | Code & Ethics | 100 % | 7 of 7 | 01/28/2017 | 03/01/2017 | 18:17 | 50 | N/A | N |
| John Doe | | | CA | Code & Ethics | 100 % | 7 of 7 | 02/23/2017 | 03/06/2017 | 13:31 | 76 | N/A | N |

**Need to enroll a candidate?** Manager Tracking accounts include a simplified registration feature designed to ensure your candidate gets immediate access to their accounts.

Visit us online at **www.examfx.com**
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