XCEL an STC Company

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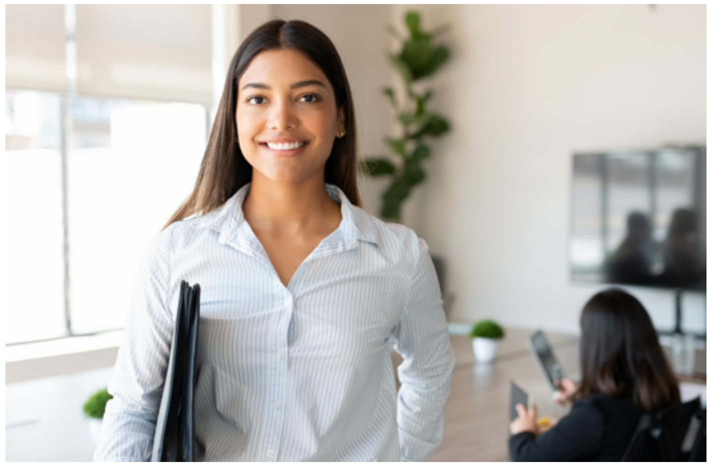
Manager Guide



Candidate Enrollment:

Your personalized XCEL enrollment flyer can be forwarded to your candidates who need to register for an insurance or securities pre-licensing course. The flyer contains your personal discount code & instructions on how to register for their course. Candidates who use your code to enroll will receive a discounted price, and will also be directly placed in your pipeline.

The best way is to have the candidate self-enroll using the instructions found on your flyer. Entering personal information accurately while enrolling in the course will prevent the potential delays in the candidate's overall licensing process.

Your Management Portal:

https://xcelsolutions.myabsorb.com/Admin/Login

To see your active pipeline enrollments:

1. Log in to your XCEL manager portal with the username & password that were emailed to you. Then, click users on the left. A list of everyone who has enrolled using your discount code will be displayed. You can choose your filters such as **Date Added**, **Last Logged In**, **Phone #**, **City**, **State**, and more.
2. Your **filter key** is to the top left of your pipeline list:
3. Place your filters in the order of your liking by **dragging & dropping each section header** to the horizontal order of which you'd like to see your pipeline information.
4. You can also **sort your filters** by most recently enrolled, or by first or last name by clicking on the **triangle on the name of the section header**. This will group your data in ascending or descending order, by common groups, etc.
5. Once you've chosen your filters, save the layout and name it:
6. Once saved, you can now export this data to an excel spreadsheet to share with your administrators:
7. You can also schedule your saved report layouts to be emailed to you at any given time (daily, weekly, monthly, quarterly, etc):

To view the specific details of your pipeline's study progress:

Click **users**, click the student's name, and then select transcript on the right. Click the student's course, and you will see exactly which chapter the student is currently working in. Click the **dropdown arrow** on the right to see how many times a chapter exam was attempted, the score for each attempt, the amount of time the student is spending in the study material, etc.

Keep in mind that you will receive a daily progress report displaying your pipeline's study progress. This is sufficient in providing the overall study progress

XCEL Points of Contact:

Managers: clientservices@xcelsolutions.com **Students:** support@xcelsolutions.com