

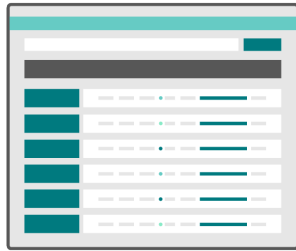
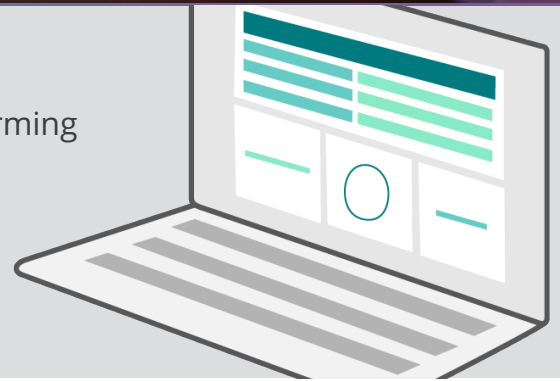


A.D. Banker for Business User Guide

Licensing made simple

Quickly identify where your students are and how they are performing

- Easy-to-use Dashboard
- Detailed Student Progress Reports
- Hierarchy and Student Management
- Custom CSV Exports
- Automated Email Notifications



Generate customized reports

Use real-time information to make better decisions

- Show and hide courses
- Track licensing exam results
- Export reports to CSV file
- Search, sort and filter

View and Share Progress Reports

Identify specific areas for improvement and remediation

- Print Certificates of Completion
- Understand performance and progress through courses
- View chapter exam attempts including date, score and time spent
- See a timeline of course activity



Additional Features



Dashboard



Notifications



Progress Reports



Student Profiles



Hierarchy Management



State Exam Results



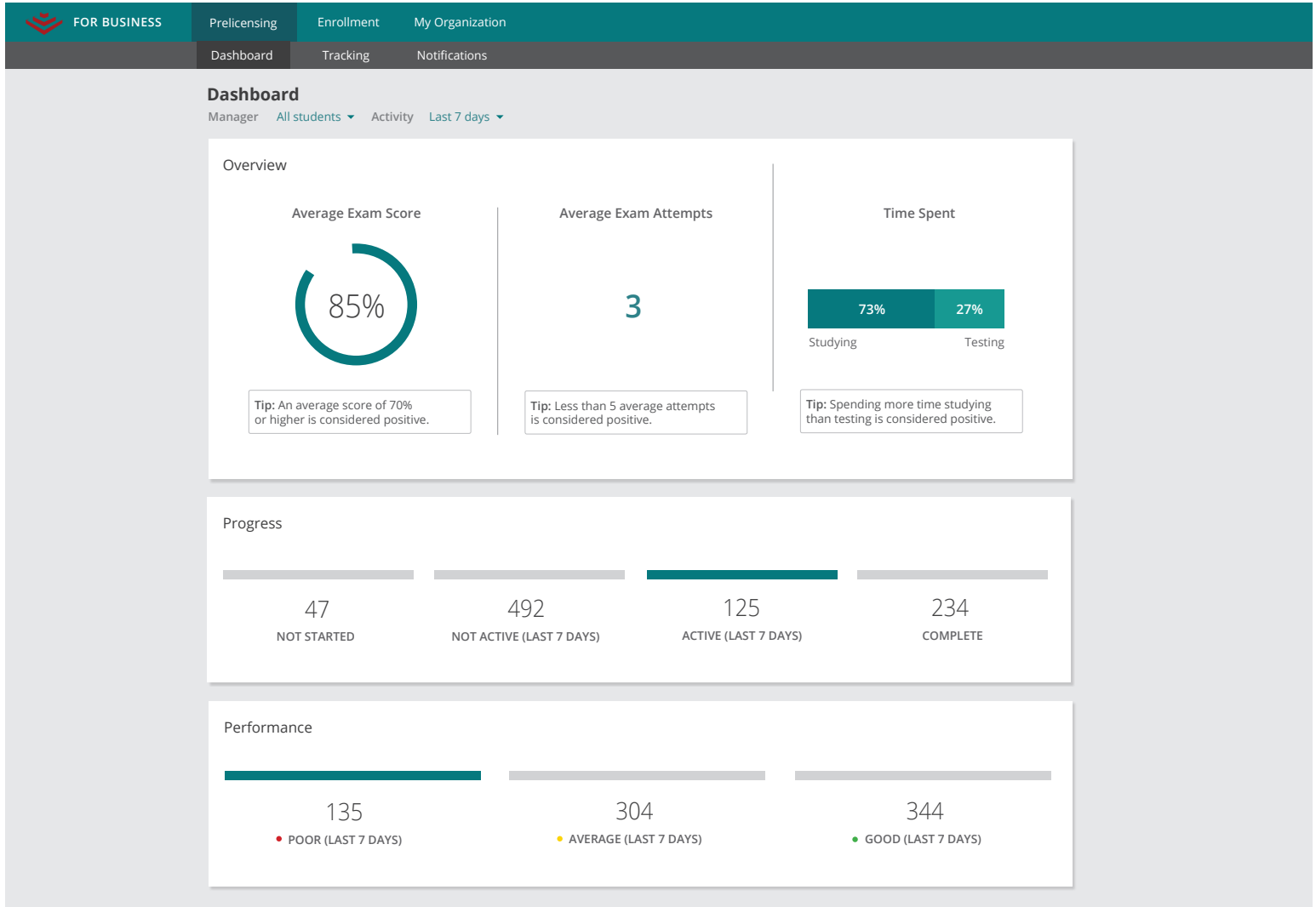
Certificate of Completion



1. PRELICENSING TRACKING

Keep your recruits on track by knowing what, how, and when they are studying and when they have completed a course.

a) Dashboard



Understand how your students are performing as a whole and identify individual students who need more help.

- Overview of study habits
 - Average exam score
 - Average exam attempts
 - Average reading time vs. testing time
- Progress overview (not started, not active, active, complete)
- Performance overview (poor, average, good)
- View by manager and activity range



b) Tracking

FOR BUSINESS | Prelicensing | Enrollment | My Organization

Dashboard | Tracking | Notifications

All Students | All Courses | + New Filter

Find by student name or email...

<input type="checkbox"/>	Student Name	Course	State	Enrolled	Last Activity	Performance	Time (hrs)	Chapters	Chapters (%)	Comprehensive Exam	Certification Date	Licensing Exam	Custom 1	Custom 2
<input type="checkbox"/>	Angelo Nichols anichols@email.com	Series 6	KS	12/08/17	2/16/18	● Good	21.5	7/15	47%	--	Not Required	--	--	--
<input type="checkbox"/>	Kristen Valdez kvaldez@email.com	Life	TX	2/9/18	2/16/18	● Average	15	8/8	100%	2/15/18	Not Required	--	--	--
<input type="checkbox"/>	Terry Allen tallen@email.com	Property & Casualty	CA	1/15/18	2/10/18	● Good	58.6	15/15	100%	2/10/18	2/10/18	Passed	--	--
<input type="checkbox"/>	Nick Simmons nsimmons@email.com	Series 63	KS	2/5/18	2/12/18	● Poor	12	4/4	100%	2/11/18	Not Required	--	--	--
<input type="checkbox"/>	Gwen Lawson glawson@email.com	Life & Health	CA	10/19/17	1/15/18	● Good	53.7	15/15	100%	1/15/18	1/15/18	Passed	--	--

Show hidden courses

A real-time report of student progress and performance that can be easily searched, filtered, and sorted by any field and exported for analysis. Custom fields can be uploaded to tracking so the data mirrors your spreadsheet.

- Search, Sort, and Filter on 9+ data fields (Enroll Date, State, Last Activity Date, and more)
- Reorder and show/hide columns
- Upload and view custom data next to real-time tracking data
- CSV Export
- Show/Hide courses

Progress Reports

Samuel Watson - Life & Health Active 10 days ago

[View Profile](#) [Print Report](#) Expires 03/30/18

Enrolled	Last Activity	Time (Hrs)	Performance	Comp Exam	Cert Exam
01/15/18	02/10/18	32.2 hrs	● Good	02/10/18	02/10/18

Insights

Metric	Performance
Average 70% or higher chapter exam score.	👍 85% average chapter exam score
Average less than 5 chapter exam attempts.	👍 3 average chapter exam attempts
Spend more time studying than taking chapter exams.	👍 18.2 hrs time study and 3.3 hrs taking chapter exams

	Chapter	Course Detail		Activity		Licensing Exam Results			
		Reading	Testing	Attempts	Worst	Best	Avg	Completed	
✓	1	General Insurance	1.2 hrs	0.3 hrs	2	73%	100%	87%	1/15/18
✓	2	Life Insurance Basics	1.5 hrs	0.3 hrs	2	80%	100%	90%	1/15/18
✓	3	Types of Policies and Riders	2.1 hrs	0.4 hrs	3	85%	100%	92%	1/16/18

The Progress Report is a detailed view of a student's course progress and performance. View detailed information about chapter exam attempts to identify areas for additional study. Enter licensing exam results to keep track of who has passed and is ready for next steps.



Student Profile

View a student's contact information and all of the courses they have enrolled in.

- View student contact info
- Edit contact information (including Employee ID, Cost Center)
- View all courses enrolled
- View course progress reports

FOR BUSINESS Prelicensing Enrollment My Organization

Kelly Wallace
 ✉ kwallace@email.com
 ☎ 999-123-4567
 📍 Fresno, CA

[Reset password](#)

Contact Info

First Name

Last Name

Email

Phone

Phone Ext.

Address 1

Address 2

City

State

ZIP

NPN #

Cost Center

Custom 1

Courses

Life Online Course [View Report](#)

Chapter 3 of 8 38%

Enrolled	Last Activity	Time (Hrs)	Performance	Comp Exam
04/13/18	10/04/18	7.56	● Average	--

Securities Industry Essentials Online Course [View Report](#)

Chapter 4 of 8 50%

Enrolled	Last Activity	Time (Hrs)	Performance	Comp Exam
04/16/18	05/30/18	9.29	● Good	--

Help

Licensing Exam Results

Track your students' performance on licensing exams.

- Student Tracking can use this data to analyze course performance and provide insights for improvement

Course Detail		Activity	Licensing Exam Results	
Attempt #	Result	Date Taken	Score (%)	
1	Failed	06/01/18	68	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
2	Passed	06/19/18	90	<input type="button" value="Edit"/> <input type="button" value="Delete"/>



c) Notifications

Get automated student progress in your inbox.

FOR BUSINESS Prelicensing Enrollment My Organization

Dashboard Tracking Notifications

Notifications

Progress

Choose the how often you want student tracking notifications sent to your inbox.

- Email me a **detailed progress report** of my student's activity
- Email me a **weekly summary** every Monday
- Email me a **monthly summary** on the first day of each month

A **detailed report** is available to be sent at your desired frequency (daily, weekly, monthly) that mirrors what you would see in the Tracking view for the latest activity.

A **summary report** is available for each week and each month, with the changes from the previous period, so you can see if your students are on the right track. This report is a high-level overview that reflects the Dashboard view.



2. ENROLLMENT

- Enroll students in course packages tailored to your needs
- Choose if and when students get an email confirmation
- Assign multiple managers to a student
- Upload a spreadsheet of students
- Pay with a credit card, direct bill, or have each student pay after receiving a confirmation email

FOR BUSINESS Prelicensing Enrollment My Organization

New Enrollment Order History

1) Choose Package 2) Add Students 3) Review Order

Step 1: Choose Enrollment Settings

Select your package settings. You can change settings for individual students later.

Package: Life Insurance Plans & Policies

Assign To Additional Managers: Laurie Coe (laurie@mail.adbanker.com)

Send Email Confirmation to Student: Immediately

* These settings will only apply to newly added students.

[Update and Start Enrolling](#)

1) Choose Package 2) Add Students 3) Review Order

[← Edit Package](#)

Step 2: Add Students

Upload all students with a spreadsheet or add them individually.

[Enroll with a Spreadsheet](#) [Add Students](#) [Edit Settings](#) [Remove](#)

<input type="checkbox"/>	Student Name	Package	Additional Manager Access	Send Email Confirmation to Student	Options
<input type="checkbox"/>	Test G test1234@gmail.com	Life Insurance Plans & Policies	laurie@mail.adbanker.com	Immediately	Edit Delete

[Review Order](#)

1) Choose Package 2) Add Students 3) Review Order

[← Back to Add Students](#)

Step 3: Review Order

Review your order before submitting.

Payment Method: Credit Card

[← View Stored Cards](#)

Credit Card Information

Cardholder Name Credit Card # Expiration Month Expiration Year Billing Zip Code CVV

Store this card for future reference

Total: \$0.00

[Submit Order](#)



3. MY ORGANIZATION

a) Students

- Invite students to join your Organization
- Assign students to your managers for tracking
- Remove students from your Organization

FOR BUSINESS [Prelicensing](#) [Enrollment](#) [My Organization](#)

Students [Managers](#) [Custom Properties](#)

Students

List of students within your organization

[Invite Students](#)
[Update Manager Access](#)
[Remove From Organization](#)

Manager: All students

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<input type="checkbox"/>	Name	Email	Phone #	Last Login
<input type="checkbox"/>	Ricardo Ortiz	rortiz@email.com	--	04/29/18
<input type="checkbox"/>	Clark Holland	cholland@email.com	--	04/29/18
<input type="checkbox"/>	Antoinette Bridges	abridges@email.com	--	04/29/18
<input type="checkbox"/>	Ervin French	efrench@email.com	--	04/29/18
<input type="checkbox"/>	Elsa Wilkins	ewilkins@email.com	--	04/29/18
<input type="checkbox"/>	Gregg Schneider	gschneider@email.com	--	04/29/18
<input type="checkbox"/>	Irving Murphy	imurphy@email.com	--	04/29/18
<input type="checkbox"/>	Van Riley	vriley@email.com	--	04/29/18
<input type="checkbox"/>	Charlotte Gonzalez	cgonzalez@email.com	--	04/28/18
<input type="checkbox"/>	Christine Sanchez	csanchez@email.com	--	04/28/18
<input type="checkbox"/>	Eric Hansen	ehansen@email.com	--	04/28/18
<input type="checkbox"/>	Angelo Ryan	aryan@email.com	--	04/28/18

First Previous 1 2 3 4 5 Next Last

[Help](#)

Invite Students To Join Your Organization
✕

Invite Pending Invites

Email Address

[+ Invite Another](#)

Message

Join our organization on A.D. Banker.

Send Invites



b) Managers

- Get a summary of all managers in your organization and how many students they can access
- View students directly assigned to each manager
- Invite managers to join your Organization
- Remove managers from your Organization
- Assign a User Role to each manager, determining what they can and cannot do or see
 - In descending order of authority, those User Roles are: Owner, Administrator, Super Manager, Manager, Viewer

FOR BUSINESS Prelicensing Enrollment My Organization

Students Managers Custom Properties

Managers

List of managers within your organization

Invite Managers Remove From Organization

<input type="checkbox"/>	Name	Email	Student Count	Last Login	User Role	Student Access
<input type="checkbox"/>	Jennifer Howard	jhoward@email.com	1302	04/27/18	Owner	View Students
<input type="checkbox"/>	Esther Chavez	echavez@email.com	8	02/14/18	Super Manager	View Students
<input type="checkbox"/>	Maureen Watts	mwatts@email.com	50	04/29/18	Administrator	View Students
<input type="checkbox"/>	Harold Robertson	hrobertson@email.com	20	03/05/18	Manager	View Students
<input type="checkbox"/>	Kayla Barnes	kbarnes@email.com	1	--	Administrator	View Students

Invite Managers To Join Your Organization
✕

Invite
Pending Invites

Email Address

Email Address

+ Invite Another

User Role Settings

Choose User Role

Message

Join our organization on A.D. Banker.

Send Invites

USER ROLES

Owner
All permissions. Only one owner per organization.

Administrator
All permissions except organization deletion or merging. Can view and edit everyone in the organization.

Super Manager
Can view and edit everyone in the organization.

Manager
Can view and edit anyone assigned to them.

Viewer
Can only view students assigned to them.



c) Custom Properties

- Add custom data fields to tracking (text, dates, numbers)
- Data can be sorted, filtered, and exported to a spreadsheet in the Tracking view

FOR BUSINESS Prelicensing Enrollment My Organization

Students Managers Custom Properties

Custom Properties

Create personalized fields for student tracking

[Create a New Property](#)

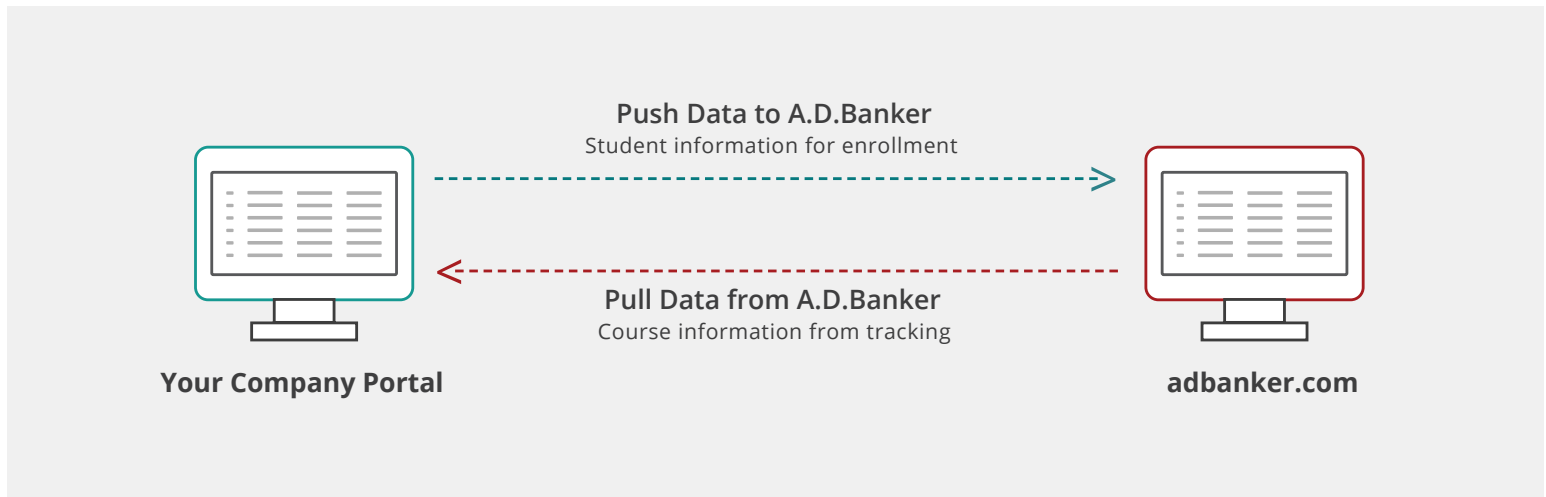
Property Name	Type of Property	Creator	Date Created	# Places Used
Custom 1 Custom1	Text	Derek Ballard	08/30/18	4
Custom 2 Custom2	Number	Kim Powell	09/21/18	17
Custom 3 Custom3	DateTime	Eula Warren	09/27/18	12



4. DATA INTEGRATIONS & AUTOMATION

a) API Integration

- Automate your licensing process
- Auto-enroll students during your onboarding process
- Sync course progress and performance data in real-time
- Uses the industry standard OAuth2.0 Authentication Protocol
- Students click a button and land in their dashboard already enrolled in the courses they need, and are automatically added to tracking and synced with your company's intranet platforms
- Your Organization's IT department can pull data from tracking to use in internal applications, reports, notifications, and more



b) Single Sign On

- Automatic account creation
- Automatic sign-in
- Automatic enrollment when using A.D. Banker API
- Perfect data integrity between our system and yours
- Uses the industry standard SAML 2.0 Authentication Protocol

