Transforming the world of work.

Account Configuration

You are just 4 steps away from Go-Live!

Account Configuration

To complete your launch of the OutMatch solution, there are just **4** easy configuration steps to follow before you and your organization are live with **Chequed Reference!**

Go-Live!

Inviting Candidates

Adding Positions

Adding Users

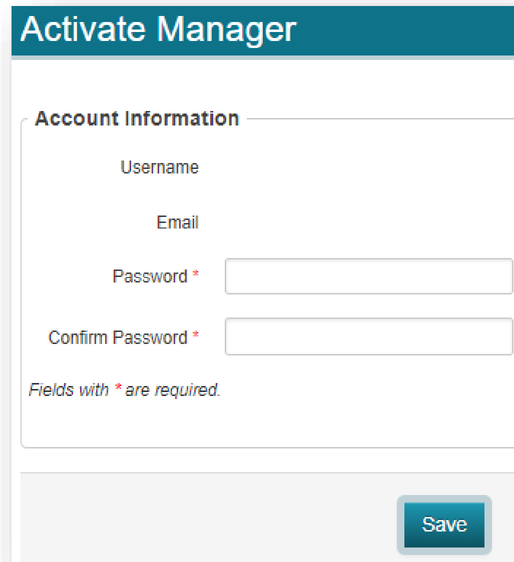
Logging in

Let's get started!

Logging into Chequed Reference

Username & Password

Prior to **logging into your account for the first time**, you will receive an email from 'noreply@chequed.com' with a link to establish your password. You will choose your password when you first login. You can always change the password later or reset it using the reset password function.



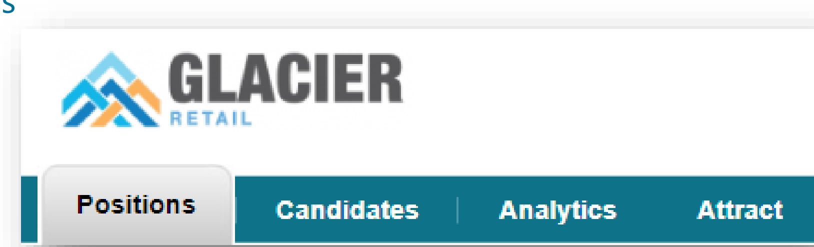
Once you have clicked on the link to activate your account, you will be asked to create and confirm your new password. Your username and email address will be automatically populated.

Once you have created your account, you can log into the Chequed dashboard any time by going to https://app.chequed.com/ and entering your username and password. Be sure to bookmark this page!

Your Chequed Dashboard

When logging in to your new Dashboard, you will see 4 tabs in the upper left-hand corner for navigating through your:

1. **Positions**
2. **Candidates**
3. **Analytics**
4. **Attract** (if activated)



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Logging in to your New Dashboard

Your Chequed Dashboard

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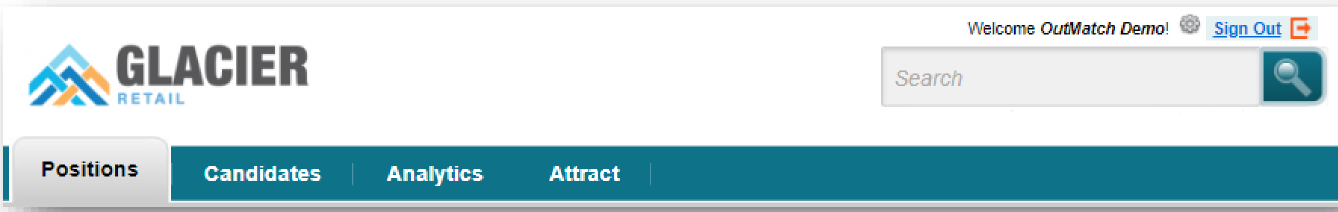


Each of the navigation tabs will be a part of your day-to-day use of the Chequed Reference platform. We will share more about using each tab in our Support Library and training materials. At a high level, and for general navigation, these tabs include:

- **Positions**: add new jobs to your account, view job-specific candidate activity, and invite new candidates to the reference check.
- **Candidates**: search and filter through candidate results, send reminders, and stack rank best match candidates to review their reports.
- **Analytics**: your usage and reference check overview – check in on candidate insights and completion statistics real-time!
- **Attract**: an optional feature that creates a sourcing database of references who have indicated they are interested in employment opportunities at your organization

Chequed Reference Settings

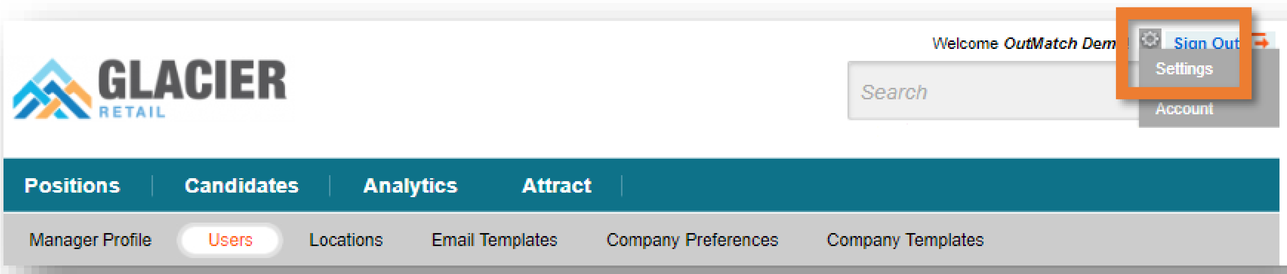
We have included several customizable options in the Chequed Settings. To see them all, navigate to the upper righthand corner of your dashboard and click on the Settings gear – here you will find candidate experience customizations, user and permissions management, and advanced preference settings.

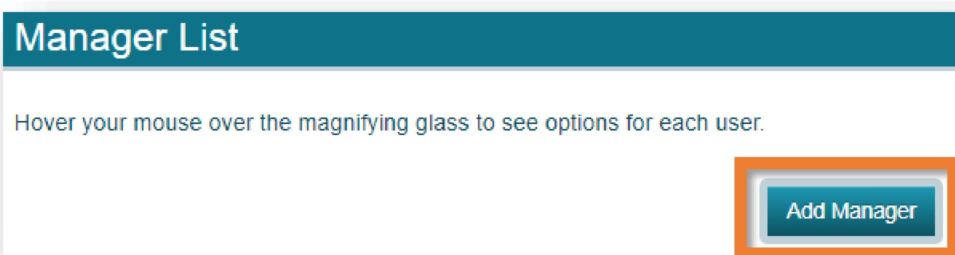
For this Launch Guide, we will focus on User Management and Adding Users. Be sure to return to your account Settings in the future or visit our Support Library to further customize your Chequed Reference solution!

2 Adding Users to your Dashboard

Add Users in 3 Easy Steps

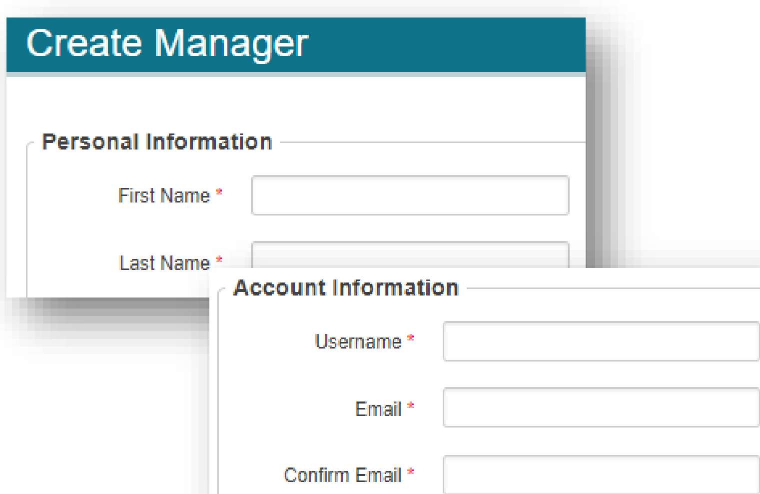
1 To add users, navigate to the Settings gear in the upper righthand corner and then select Settings. Click **Users** to start adding Admin and Regular users to your account.





2 Here, you will see a list of all current users. Click **Add Manager** to get started.

3 To add a new user, fill in his or her name, username, email, and account type and click **Save** – you now have an additional User in your account! An email will automatically be sent by the system to invite the new user to activate their Chequed account and choose a password.



Adding Users to your Dashboard

OutMatch User Types

As you add users to your **Chequed** dashboard, you will have the option between two kinds of users with different permissions levels to assign to your team members:

Regular Users:

Regular users have the ability to add new positions, invite candidates to complete the Chequed Reference process, access their candidate reports, and review analytics.
Tip: This kind of user is most commonly assigned to **Hiring Managers, Field Recruiting Teams,** and **participants in the interview process**.

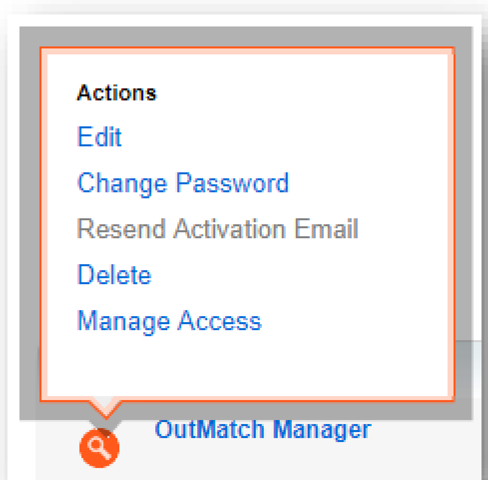
Admin Users:

Admins have access to the same features as regular users, and can also manage user access to positions, add and remove users, edit company level customizations, and configure interview questions.
Tip: This kind of user is most often assigned to **Human Resources, Recruiting,** or **Operational Leadership**.

All users can access the Positions, Candidates, Analytics, and Attract tabs within their Chequed dashboards, and Admin users can adjust user permissions at any time through the Settings gear.

User Management

Regular users can be edited and deactivated by Admins any time through the **Settings** gear. If an email address or name changes, of if a user needs access to different positions, these can be managed here as well.



Simply hover over the orange magnifying glass next to the user's name, click on **Edit** or **Manage Access**, and follow the prompts to make any changes!

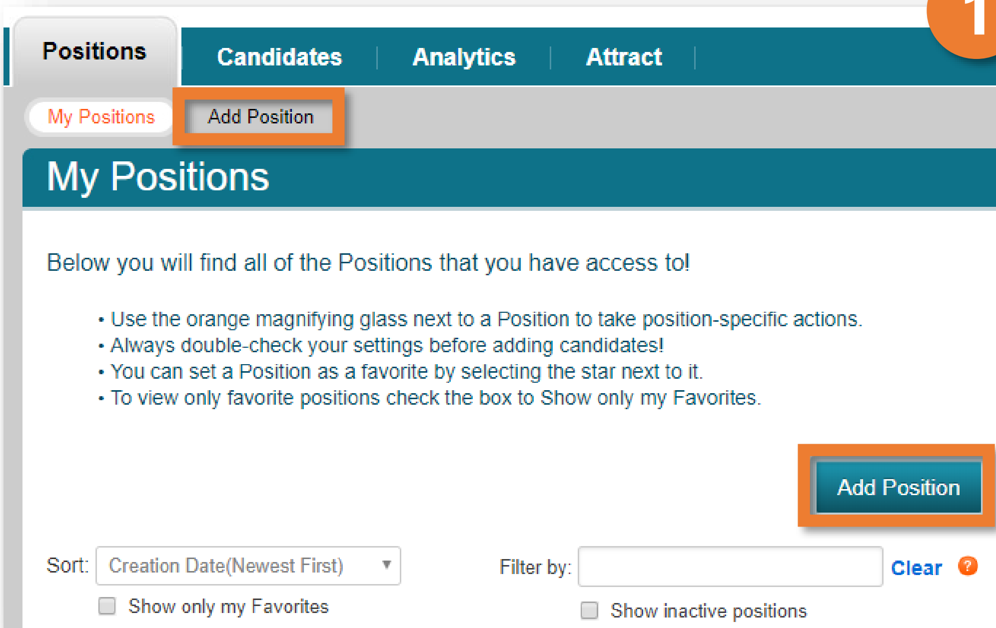
3 Adding Positions & Locations

Select a Job Title

1

To get started with adding your first Position, go to the **Positions** tab in the upper left-hand corner.

You can always add a new Position by clicking **Add Position** on the top menu or on the **My Positions** dashboard.



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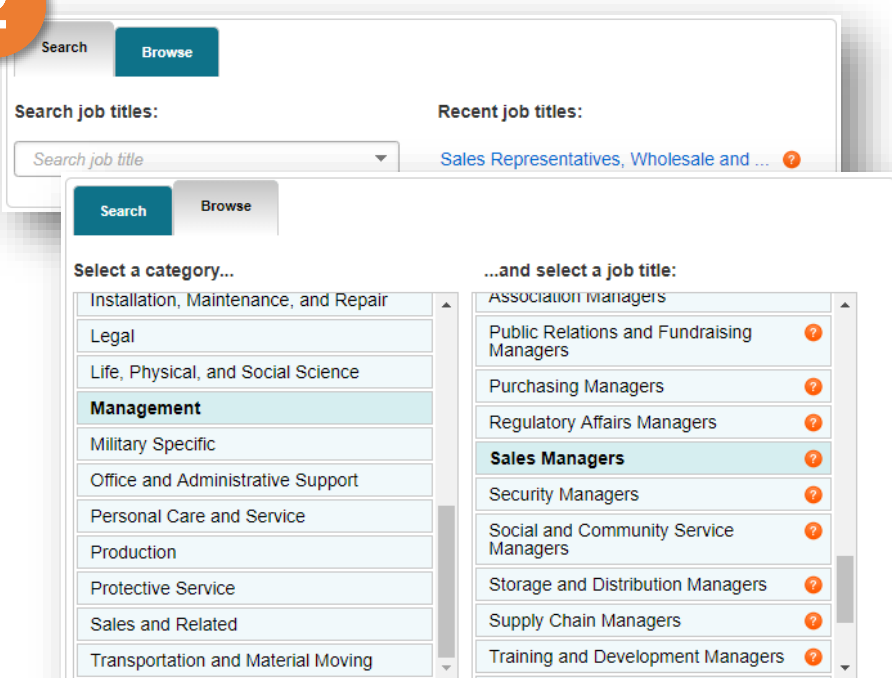
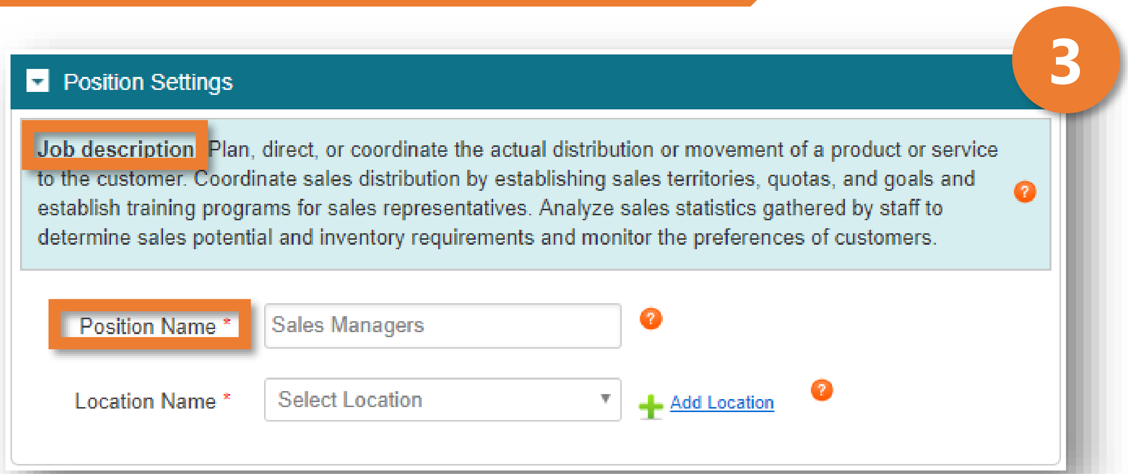


At the **Add Position** screen, you will first choose an underlying **Job Title** which contains pre-configured best practice scoring for each role.

You can use the **Search** feature to search by job title name, or **Browse** by job category.

Adding Positions & Locations

Name Your Position



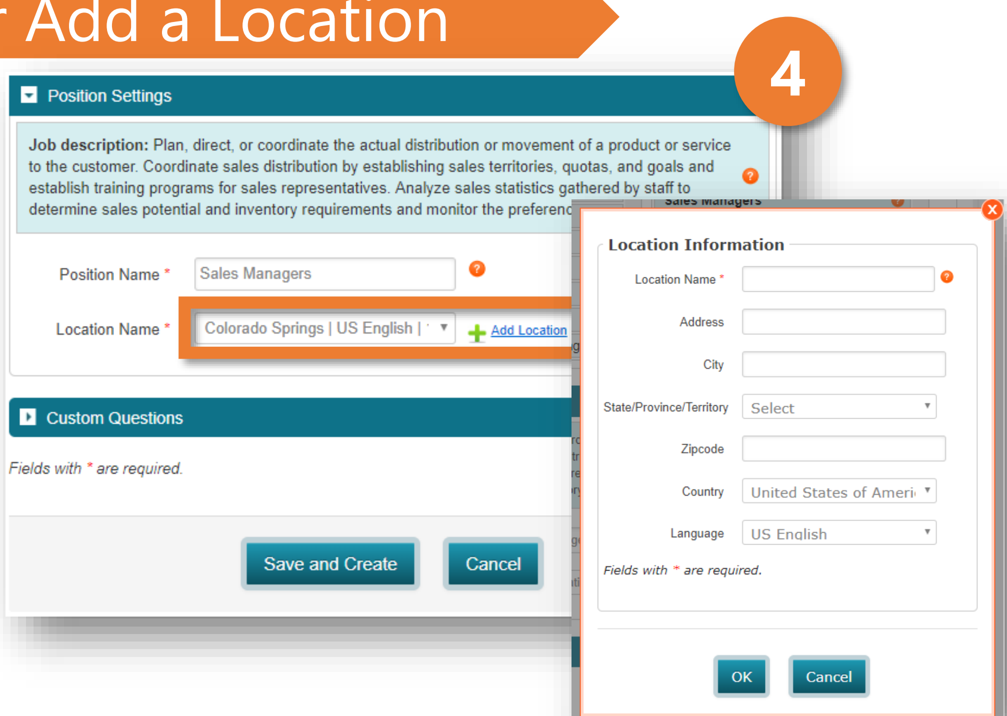
Once you have selected a Job Title which closely matches your position, a Job Description will be displayed in the **Position Settings**.

You will be able to name your **Position** to a manager- and candidate-facing name, and you will be prompted to select or add a location.

Select or Add a Location

Select a Location Name from your list or add a new location by clicking **Add Location**.

Name your new location, add any additional details you wish to include, and click **Save**.



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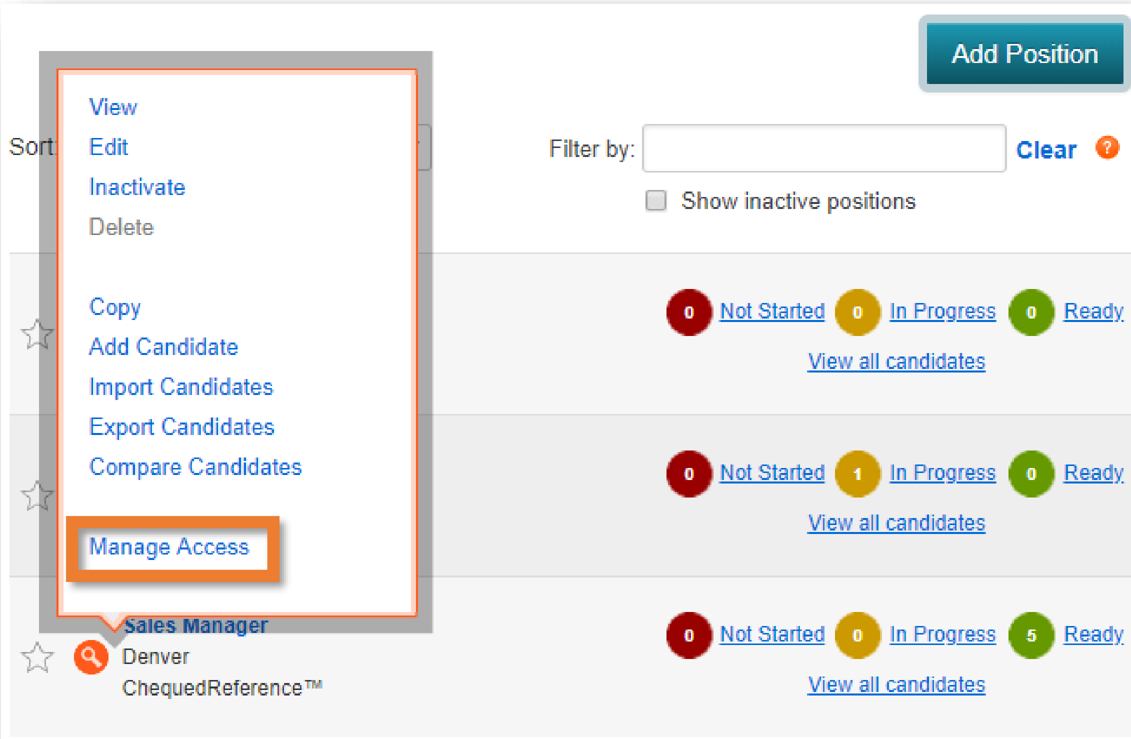
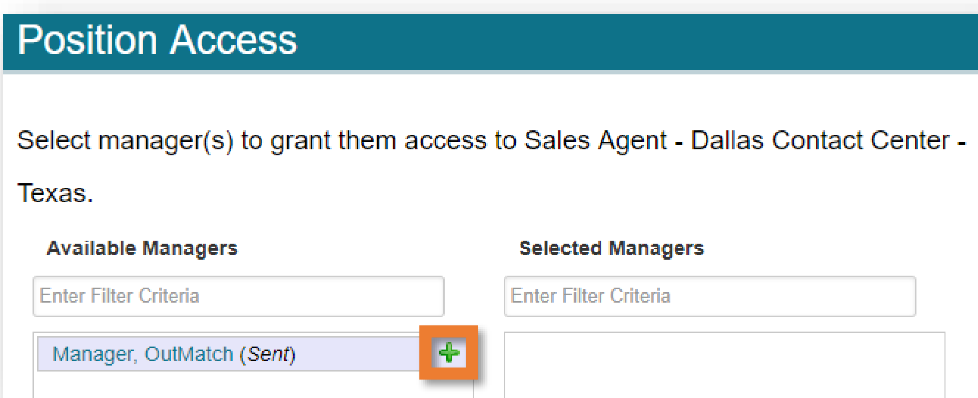
Adding Positions & Locations

Manage Position Access

5 Admin users will automatically have access to all positions. You can manage which of your regular users have access to each Position by hovering over the orange magnifying glass next to the Position name and clicking **Manage Access**.



The **Position Access** screen will display a list of all **Available Managers** as well as all **Selected Managers** who currently have access to this Position. Click on the green "+" symbol and move managers to the Selected Managers list.

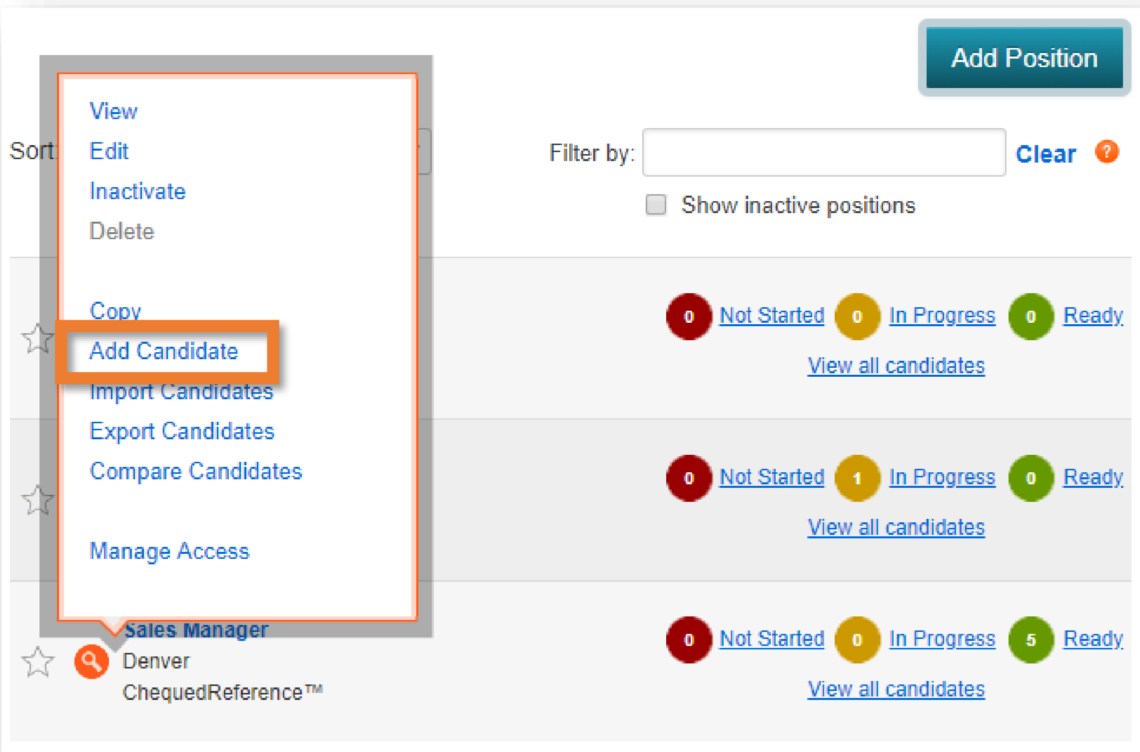


Invite Candidates in 2 Ways

Candidates can be invited to any of the positions you have added by two ways: simply look for the **looking glass next to your positions** and choose whether you will invite directly or through the self-registration link:

1 Direct Invitations

From the **Home Screen** of the dashboard, you can quickly invite candidates to any of the positions you have added. Hover over the looking glass and select **Add Candidate.**



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Inviting Candidates

Invite Candidates in 2 Ways

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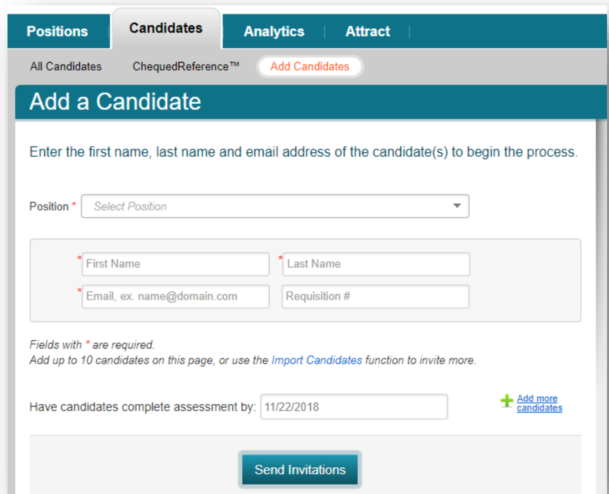
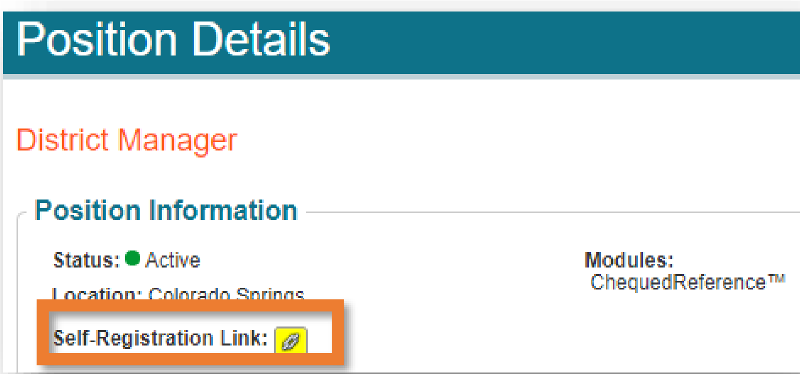
Simply add the candidate's **First Name, Last Name, Email Address** and assign to a **Position** and your Reference Check invitation will be on its way!



Self-Registration Link 2



From the **Edit Job** option, you will see the **Self-Registration Link** option with a paperclip. Clicking the paperclip will copy the link, and you can share this invitation with candidates.

A Note on Self Registration...

The Self Registration Link is a great tool to invite multiple candidates via mass communication or through a standard recruiting or applicant workflow. If you are establishing new recruiting workflows or configuring an ATS or HRIS with automated email outreach, be sure to include the Self Registration Link in your workflow!

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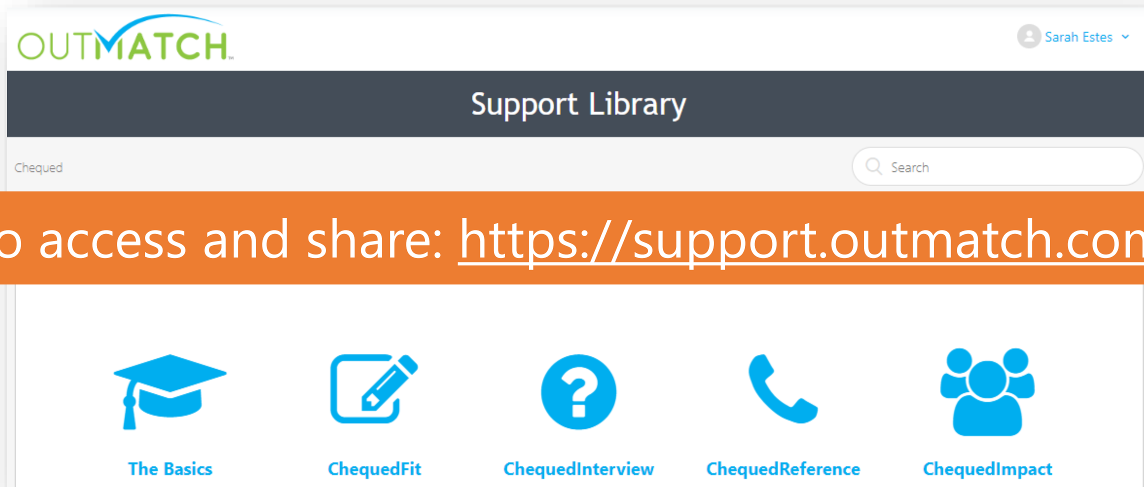
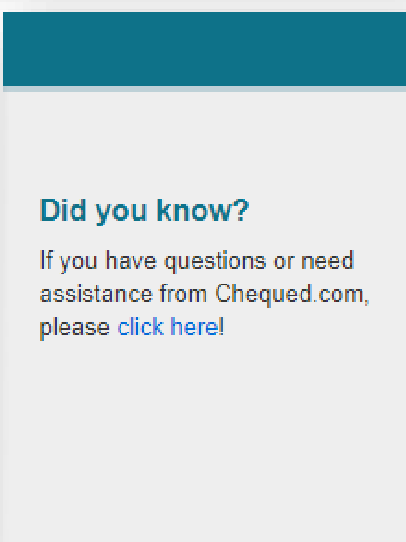
Hooray! You are now live with Chequed Reference!

Now that you have followed the 4 Configuration steps and invited your first candidates, you are **live on Chequed Reference**! We are looking forward to your feedback and to supporting your selection and development efforts with this new technology. However, the fun won't stop now that you are using the platform – help is right around the corner any time you have questions, or if your field teams or hiring managers need help.



to access and share: https://support.outmatch.com



Our **Support Library** catalogs additional resources, Best Practices, and hiring manager and candidate support. The Library is available 24/7, is shareable with your teams and hiring managers for additional help, and is also always accessible via the **Help Widget** on the righthand side of you Chequed Dashboard.