FAQs to get started as a Money Habitudes Online Administrator


IMPORTANT NOTE

Please tell people that Money Habitudes Online will not work on Internet Explorer.
Microsoft is no longer supporting older versions. Chrome, Firefox, Safari or other browsers will work.

TO START: To sign in, go to https://online.moneyhabitudes.com/ and click on *login*. Enter the email address you used to sign up and your password and you're good to go! We suggest you bookmark the site for your convenience. **Note:** If you have more than one email address, be sure to enter the one you used to purchase this account.

NAVIGATING THE ADMINISTRATOR'S AREA:

- The dropdown menu is on the top right for the Dashboard, Settings, Subscription and Logout.
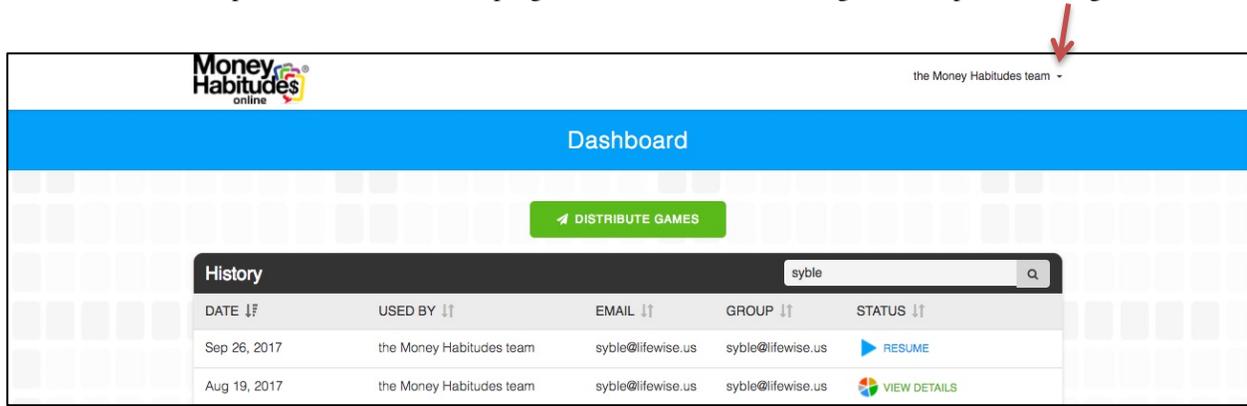
DASHBOARD

1. **How many games are left?** See in graphic below under Create Codes the number of game uses you have left
2. **To send individual codes**, **click on Distribute Games button,** enter an email or multiple emails separated by a coma. A unique email will be automatically sent to each email address you entered. It will have the link to your landing page where they will enter their email and password and play the game.
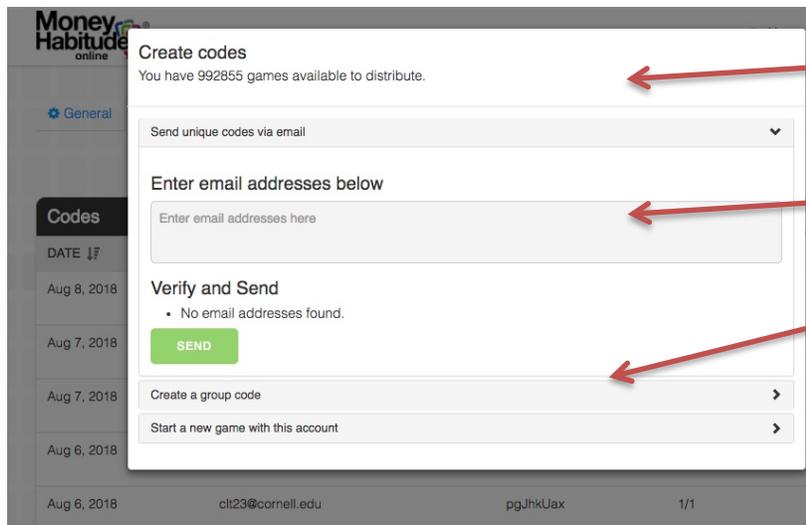

Games remaining

Enter one or more email addresses separated by a comma.

Group code: Name your group, assign the # of uses. Revoke any unused games and they will return to your pool of uses. Share the link with others to let them play or give them the code to enter at online.moneyhabitudes.com.

3. **Create Group Code:** The event name is only for your eyes. Use names that make it easy for you to sort your groups. Enter the number of uses you want associated with that code. If you don't need as many as you've assigned, you can revoke them and return them to your general pool of games. You can send or post that link anyway you wish.

   - When games uses are assigned to a Group Code and not used, select the group name under Settings, a window will open with this group name and link, then click "Update Share Total" and reduce the number of uses to 0. This will return remaining game uses to your general pool and that code can no longer be used.
- **Start a New Game with this account.** This is most useful if someone is sitting with you and you want them to play immediately on your computer or tablet.
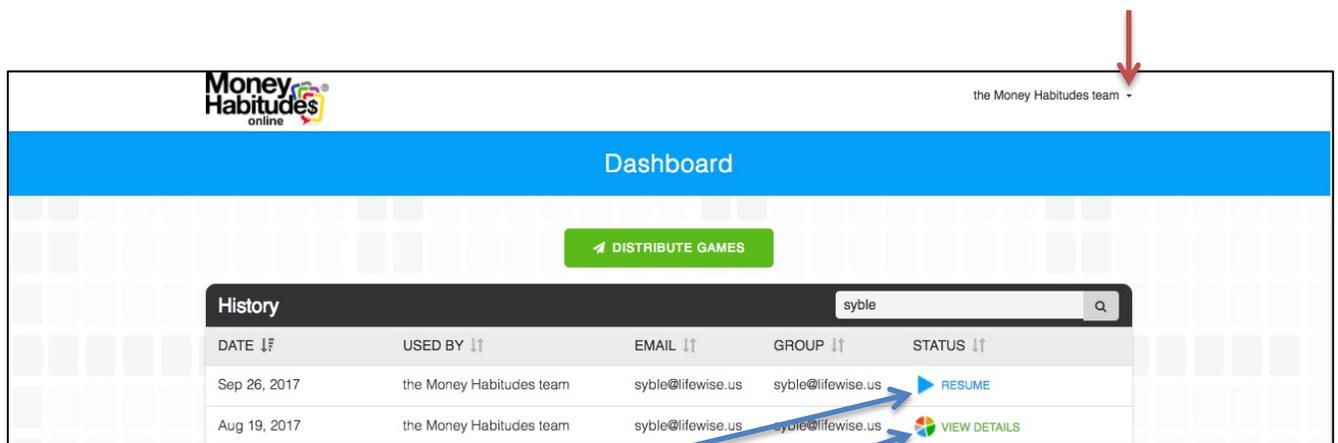

- **Dashboard:** Once you start using it, you'll see everyone listed who has signed on.
  - If you see a triangle on the right, they signed on but have not finished the game. (They can go back, enter their email and password and pick up where they left off.)
  - If there is a pie chart, they've finished. Click on it and you can see the quick results and the full report. If you also have the professional report included in your subscription, you can access the professional report here and it will have the individual responses to each statement. (Contact me if are interested in using the results for research purposes. I can provide results in a more easily accessible format for that purpose.)
  - Use the search bar to find a user by name, email or group (if activated).
  - Columns can be sorted by date, name, email and group.

Settings:
- **General:** change your setting and password
- **Codes:** There is a search option and columns for date, email address, and code can be sorted. Last column allows you to see how many games you assigned to that group and how many have been used. Click to get the link or the code and click on details to revoke any unused games and return them to the general pool. To send a link to someone to use a group code, click on View Details to get the link.

- **Branding:** If you purchased Standard Branding or it is part of your package, you can brand the landing screen where your clients sign in and/or the report cover. Simply upload your image as a .jpg or .png (usually a logo) and enter your text. It will automatically size it. Add the text. Click on Update Branding and you can preview it. You can always go here and change the image and the text. The charge for standard branding is a one-time charge. Contact us to ask about customized branding.
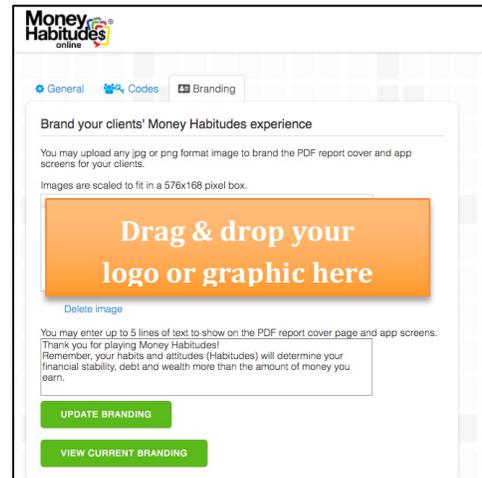
Adding Uses & Cancellations

- **Need more uses?** If you have an annual subscription, simply purchase another subscription using the same email and it will be added to your current account. If you have a monthly subscription, you are limited to the number of uses for that account and at the end of the month unused games do not roll over. However, any assigned codes will remain active. If you need more uses, please increase your subscription to the next level.
- **Need to cancel?** Contact us. With a monthly subscription, the account will be cancelled at the start of the next month's billing cycle.

More options:

- <u>Who Uses It</u>: To see how Money Habitudes is used throughout the diverse professional fields
- <u>Click here</u> to read about Money Habitudes in the news

We hope you have a great experience with Money Habitudes. We welcome all feedback.
Please contact us if you have any problems with the website or questions.
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