This is a Quest CE FE Express administrative document. Please be sure to save, file and store this document for future use. If you have additional questions, please feel free to call your Account Executive at (877) 593-3366.

FE EXPRESS QUICK START GUIDE
STEP 3

Thank you for downloading your FE Express Quick Start Guide. This document contains the final steps needed to set up your program.

After you click **"Add Students,"** the FE Express platform will direct you into Quest CE's Learning Management System. You are now logged into your company's Administrative Portal and will be able to complete the steps needed to setup your program.

STEP 3
BEGIN PROGRAM

3.1 Add Students

Now that you are logged into your company's Administrative Portal, you will be prompted to create a new student.

To meet FINRA's requirements, you will need to provide FE Express with principal student information. Each student profile will also need to contain a unique username and password that will be used to access the training portal.

Here, you will need to provide the system with at least your student's preliminary details, a username and a password. Other usable fields include unique identifiers, home/business address, spare data fields (used as detailed reporting options) and functionality flags ('yes' provides students with the option to access each item, whereas 'no' disengages access).

3.2 Assign Training and Tracking

Upon adding a new student, scroll to the bottom of his/her profile. By clicking on the **"Add New"** button, located beside any of the chosen services, you will be able to assign training items from your firm's pre-loaded list of courses, surveys and tracking services. Available options are dependent on items purchased. Once you have assigned your selected items, the content will load into the student's profile accordingly.

Continue as Needed

You have now fully entered a Student Profile. Continue adding students and assigning courses in the same manner by clicking on the **"Create Student"** link at the top of the page.

REPORTING USER GUIDE
DOWNLOAD

3.3 Launch Program

Now that all of your student profiles have been created, you can begin launch your program. Administrative and student access will be immediately available for training and tracking.

<mark>IMPORTANT!</mark>

To successfully manage your program and reports, you will need to download the **Reporting User Guide**, located within the

ACCOUNT

tab of your administrative menu.

The Reporting User Guide Includes:

- An Overview of the Dashboard Menu Items
- Your Reporting Options
- How to Edit your Account
- How to Add/Edit & Manage Student Profiles
- How to Launch Your Program
- Frequently Asked Questions

QUEST CE
FE EXPRESS Quick Start Guide