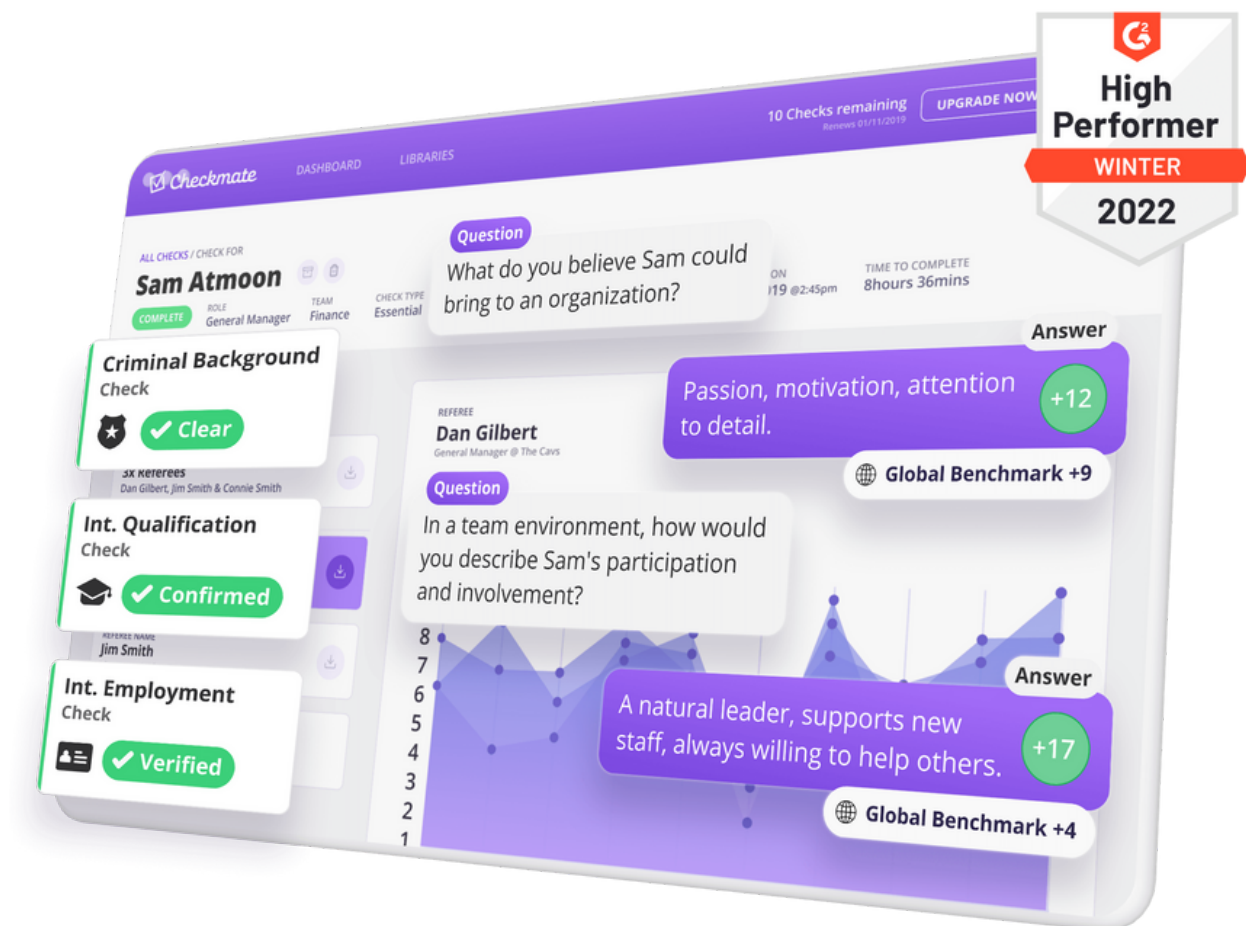




Quick Start Guide



Overview



Overview & Setup

Getting Started

Monitoring Progress

Completed

Support

Account Setup



- 01** Users have been activated
- 02** Branding has been setup
- 03** Templates have been built
- 04** Checks have been activated
- 05** User testing complete



Support Team

With Checkmate, help is never far away. You can contact our 24/7 Support team via Messenger, Email or Phone from anywhere, anytime.

Email: team@checkmate.tech
Phone: +61 2 8006 8139

Getting Started



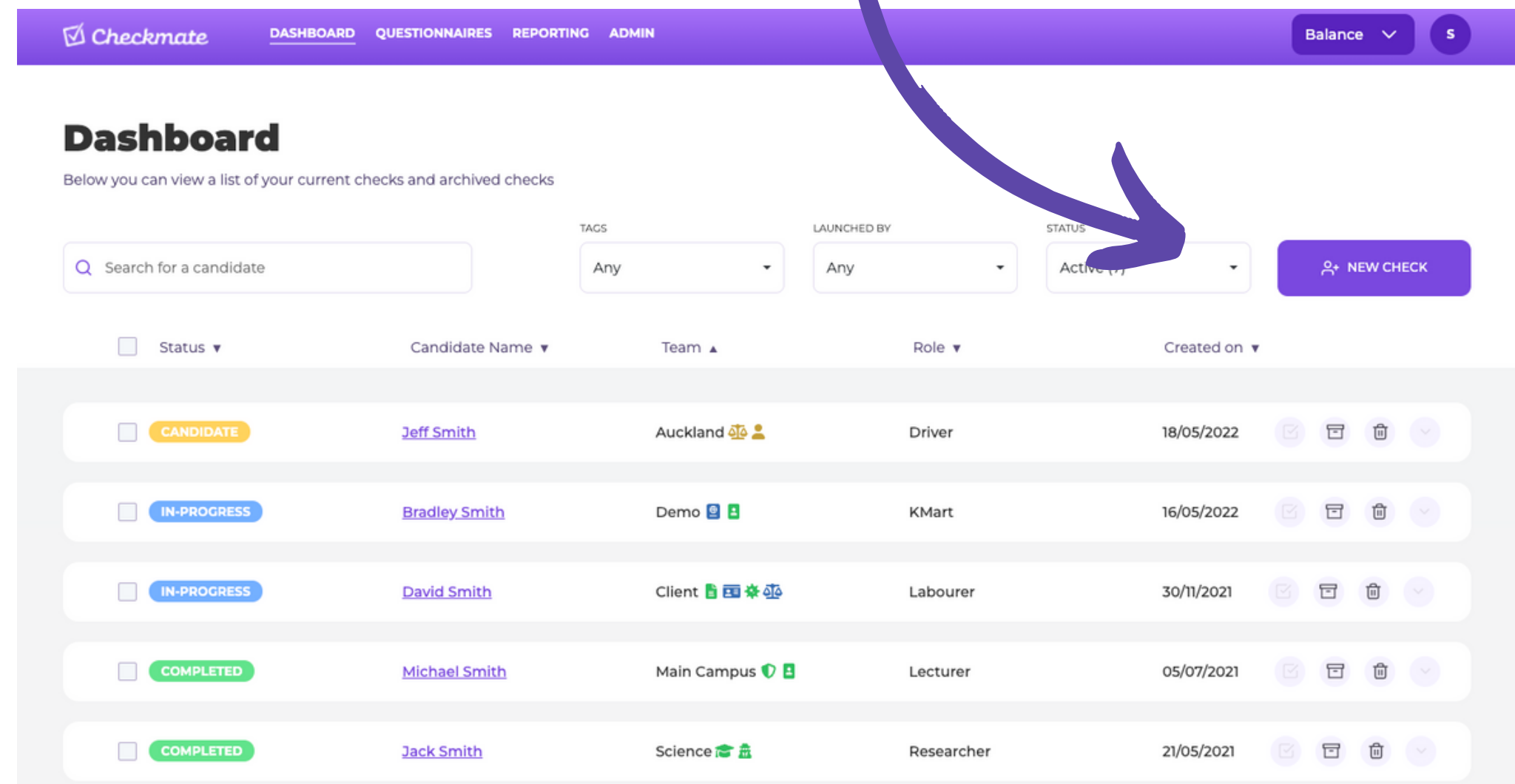
01 Login & Active 2FA

02 New Check

03 Candidate Name & Contact Details

04 Select Checks

05 Launch



Checkmate DASHBOARD QUESTIONNAIRES REPORTING ADMIN Balance ▾ 5

Dashboard

Below you can view a list of your current checks and archived checks

Search for a candidate TAGS Any LAUNCHED BY Any STATUS Active (7) [NEW CHECK](#)

<input type="checkbox"/>	Status ▾	Candidate Name ▾	Team ▲	Role ▾	Created on ▾	
<input type="checkbox"/>	CANDIDATE	Jeff Smith	Auckland 🏠 👤	Driver	18/05/2022	📧 📁 🗑️ ⌵
<input type="checkbox"/>	IN-PROGRESS	Bradley Smith	Demo 📺 🏠	KMart	16/05/2022	📧 📁 🗑️ ⌵
<input type="checkbox"/>	IN-PROGRESS	David Smith	Client 📺 🏠 ⚙️ 🏠	Labourer	30/11/2021	📧 📁 🗑️ ⌵
<input type="checkbox"/>	COMPLETED	Michael Smith	Main Campus 🏠 🏠	Lecturer	05/07/2021	📧 📁 🗑️ ⌵
<input type="checkbox"/>	COMPLETED	Jack Smith	Science 🏠 🏠	Researcher	21/05/2021	📧 📁 🗑️ ⌵

Monitoring Progress 🧐



01 Dashboard (Colour Coded)

02 Click on Candidate > View History

03 Email Notifications

04 History & Timeline

A screenshot of the Checkmate dashboard. The top navigation bar is purple with the Checkmate logo and links to DASHBOARD, QUESTIONNAIRES, REPORTING, and ADMIN. On the right, there's a "Balance" dropdown and a user profile icon. Below the navigation bar, the main content area shows "DASHBOARD / CHECK FOR Jeff Smith". There are several icons for actions like edit, delete, and share. Below this, a table lists candidate details: ROLE (Driver), TEAM NAME (Auckland), COMPLETED (0 of 1 Referees), CREATED ON (18/05/2022 @11:42am), COMPLETED ON (-), and TIME TO COMPLETE (-). A large purple arrow points from the "Dashboard (Colour Coded)" step to the "Jeff Smith" candidate name. Below the table, there's a tabbed interface with "HISTORY" selected. The "History" section shows a timeline of events for the candidate, including email opens and requests. An "ADD NOTE" button is in the top right of the history section.

DASHBOARD / CHECK FOR **Jeff Smith**

ROLE	TEAM NAME	COMPLETED	CREATED ON	COMPLETED ON	TIME TO COMPLETE
Driver	Auckland	0 of 1 Referees	18/05/2022 @11:42am	-	-

HISTORY ADD NOTE

Below you can view all events and notes associated with this candidate

- 18/05/2022 @11:43 Jeff Smith has opened the email.
- 18/05/2022 @11:43 @Scott Inglis sent candidate Jeff Smith a new request.
- 18/05/2022 @11:42 Jeff Smith has clicked the link attach to the email.
- 18/05/2022 @11:42 Jeff Smith has opened the email.
- 18/05/2022 @11:42 @Scott Inglis created a new Reference Check for candidate. [View](#)

Completed Reports



01

Consolidated Reference Reports

02

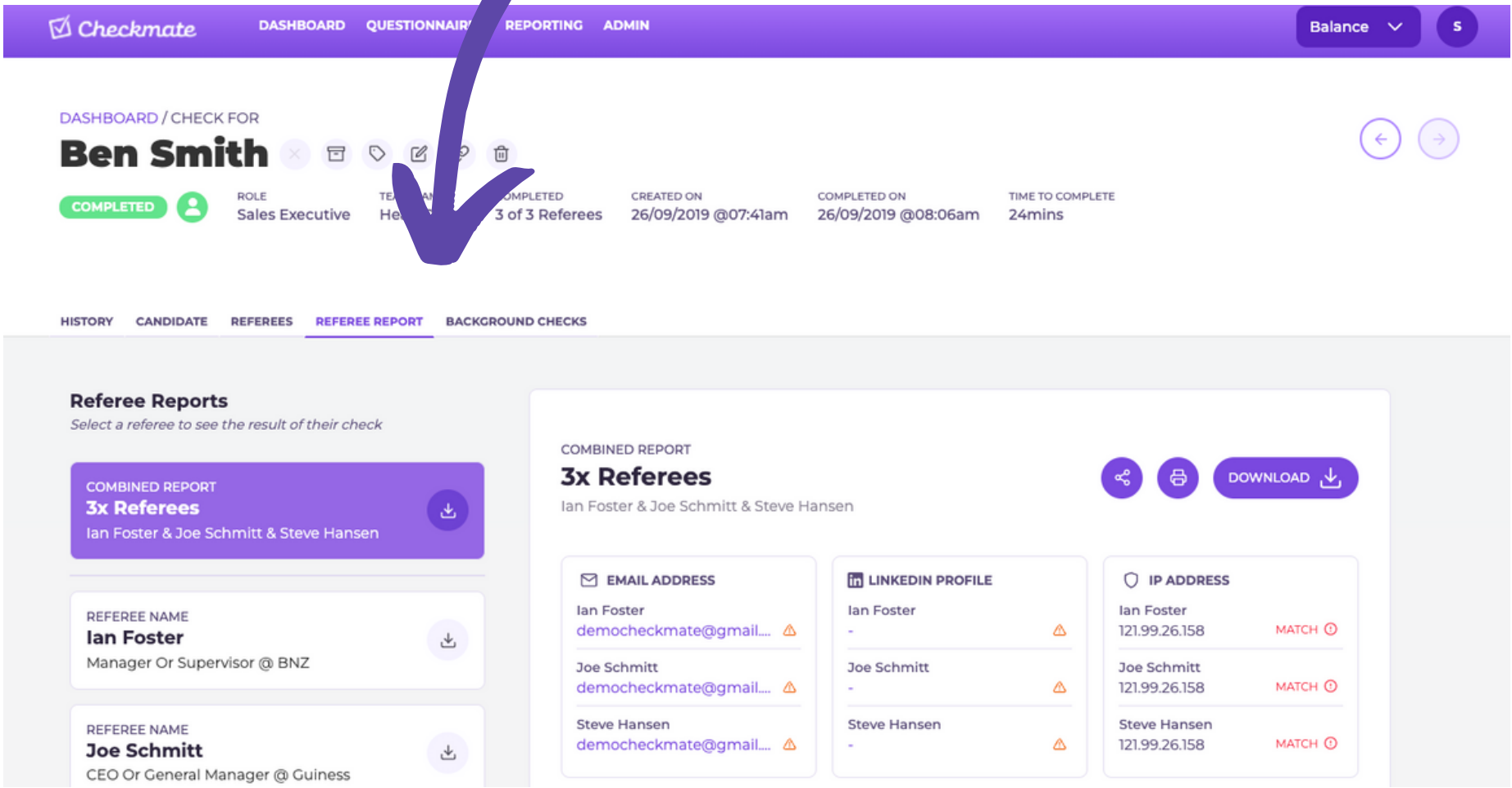
Email Notifications

03

Download, Share, Print

04

View Background Checks (Tab)



The screenshot displays the Checkmate dashboard with a purple header. The main content area shows a report for **Ben Smith**, who is a Sales Executive. The report is marked as **COMPLETED** and shows 3 of 3 referees. A large blue arrow points from the 'Completed Reports' title to the 'Referee Report' tab. The 'Referee Report' tab is active, showing a 'COMBINED REPORT' for 3x Referees: Ian Foster & Joe Schmitt & Steve Hansen. The report includes details for each referee, such as their name, role, and contact information, along with a 'COMBINED REPORT' section showing their email addresses, LinkedIn profiles, and IP addresses. The 'COMBINED REPORT' section shows that all three referees have a 'MATCH' status.

Referee Name	Role	Team	Completed	Created On	Completed On	Time to Complete
Ian Foster	Manager Or Supervisor @ BNZ			26/09/2019 @07:41am	26/09/2019 @08:06am	24mins
Joe Schmitt						
Steve Hansen	CEO Or General Manager @ Guinness					

Tips & Tricks 🎩



01

Resend Links > Resend a link to the candidate by clicking their name and the paperplane button

02

Complete Reference Verbally > Prefer to see who the referees are before automating the checks? Click "reference confirmation" then Click on 'Referees tab, click 'Answer on behalf,' the questionnaire will display on screen.

03

Customise Templates > Need to change your reference questionnaire? Click on Questionnaires > Custom > Copy or Create a new template. You can also use the AI feature (request access from Checkmate first)

04

Reporting > Need to monitor progress across the board? Click 'Reporting' choose the checks and export a spreadsheet for your records

Remember!



Checkmate is always growing and there may be lots of features you are not aware of.

01

Unlimited reference templates - multimedia options / forms

02

Need more check types, or want us to build one for you? No problem...

03

Renewals - you can create automated renewals eg visa, drivers licence etc

04

User groups, permissions and teams - you can segment and partition if you like...

Renewals

Below you can view a list of your renewals check and configured them.

Candidates Configuration

Checks

Configure renewals for your checks

Q Search...

Checks

Reference Check
Candidate Questionnaire
Ministry of Justice Check
Qualification verification
Online Identification Verification

Ministry of Justice Check

Configure this check renewal

☒ Enable Ministry of Justice Check's renewals

Years

1

Period

Years

Cancel

Save

AI Reference templates



Please advise us if you want to have this feature turned on.

01

Go to questionnaires > “reference check plus”

02

Click “Add” button

03

Click the little Robot button

04

Drag and drop your JD / PD or Job ad into the box - the tool will then generate a bespoke template for you.

The screenshot shows the 'Questionnaires' section of the Checkmate interface. At the top, there's a header with the title 'Questionnaires' and a sub-header 'Below are the different reference check types that are available with your current plan.' Below this is a navigation bar with tabs: 'Library', 'Custom', 'Candidate Questionnaire', 'Candidate Reference', and 'Reference Plus' (which is selected). The main content area is divided into two panels. The left panel, titled 'Forms', contains a search bar and a box labeled 'Questionnaire Forms'. The right panel, titled 'New Form', has a 'GLOBAL' label and a 'Settings' field. Below this are tabs for 'Questions' and 'Logic'. A large blue arrow points from a small robot icon at the bottom right towards the 'Settings' field. The robot icon is a simple line drawing of a robot with a square head, a body with a horizontal line, and two legs. The 'Settings' field has a small edit icon (a pencil) to its right. At the bottom of the 'New Form' panel are 'Cancel' and 'Save' buttons.

Food for thought...



01

Think about ways to improve from your old word docs - eg media types, NPS, referee experience, line manager surveys etc

02

Data retention - do you really need a completed police report in 2 years time? configure the settings to manage how you retain PII data.

03

Multi branded - checkmate supports multiple brands (Whitelabelled), ideal for different business units, JV's, campaigns.

04

Pre-boarding to onboarding - using Checkmate's "twin sister" KnowMy, you could automate the entire process from 'candidate >>employee'

Where to get help 📞



01 Support Team > team@checkmate.tech

02 Features, Product, escalated support > peter@checkmate.tech

03 Online Videos and Tutorials > [available here](#)

04 Check in! We'll book a call for 1 week, 1 month and 3 months to make sure everything's going well