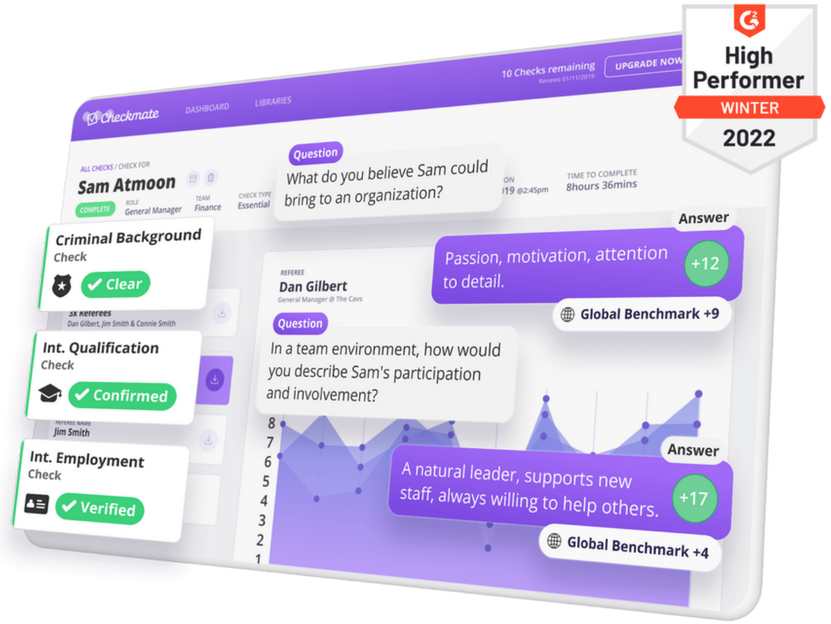
Checkmate

Quick Start Guide



Overview

Checkmate

- Overview & Setup
- Getting Started
- Monitoring Progress
- Completed
- Support

Account Setup ✅

Checkmate

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

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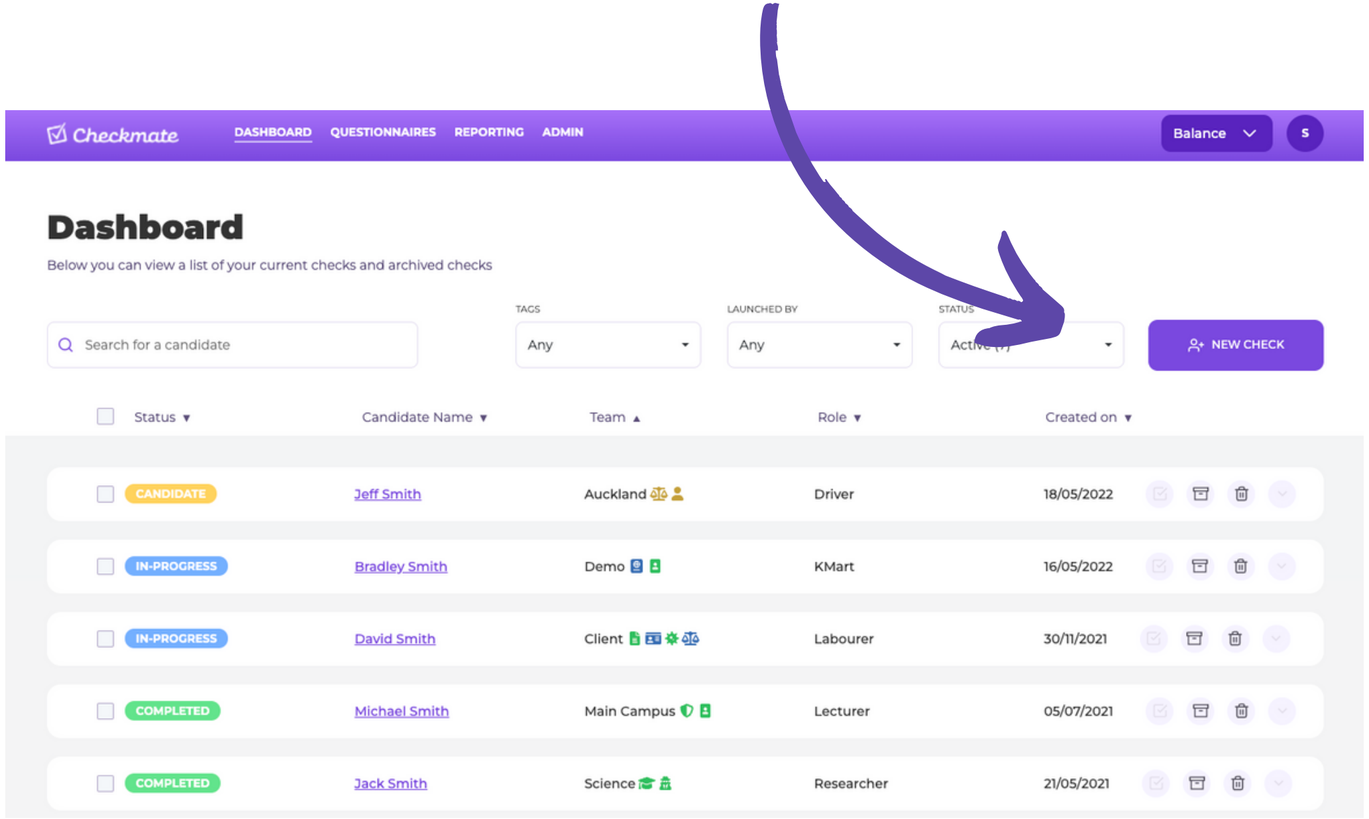
01 **Login & Active 2FA**

02 **New Check**

03 **Candidate Name & Contact Details**

04 **Select Checks**

05 **Launch**



Monitoring Progress 🔍

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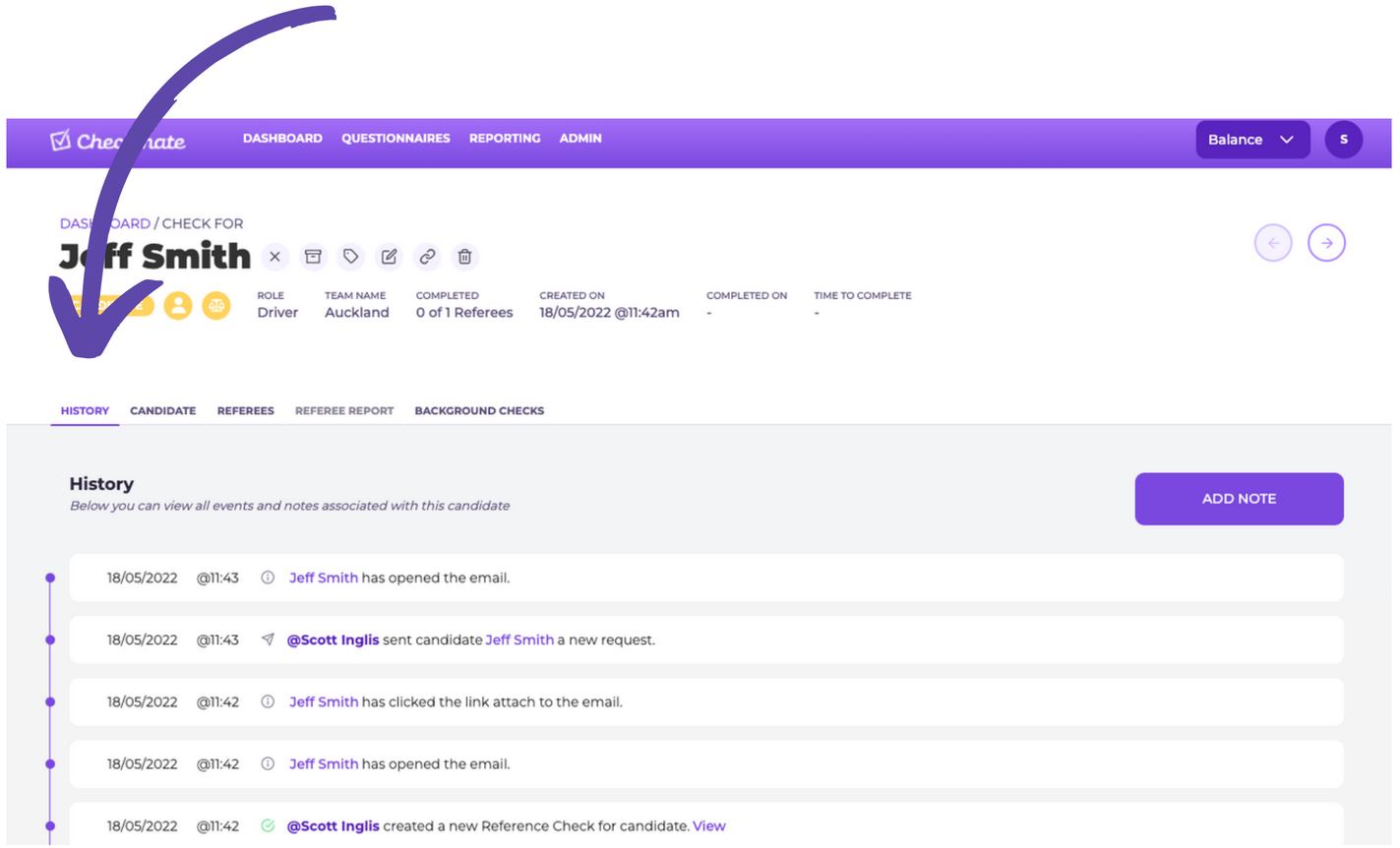
01 Dashboard (Colour Coded)

02 Click on Candidate > View History

03 Email Notifications

04 History & Timeline



Completed Reports

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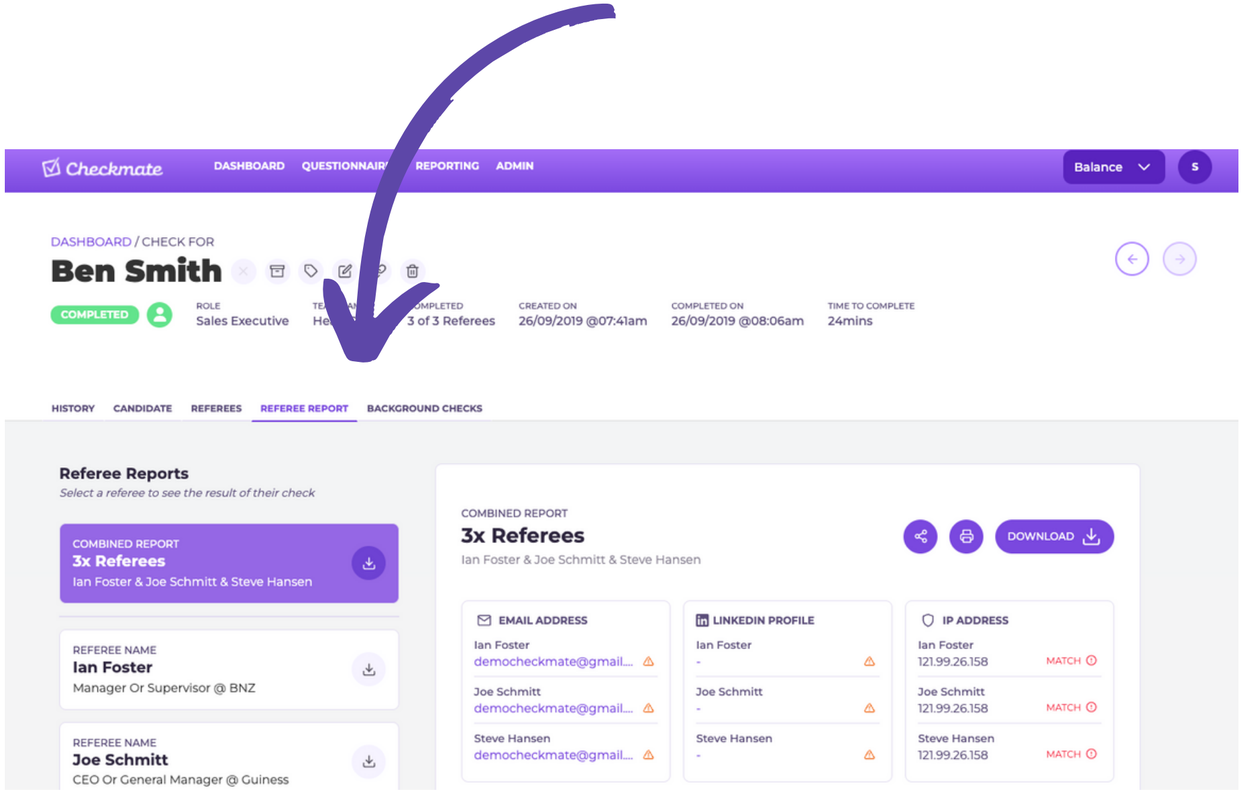
01 Consolidated Reference Reports

02 Email Notifications

03 Download, Share, Print

04 View Background Checks (Tab)



Tips & Tricks 🎩

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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!

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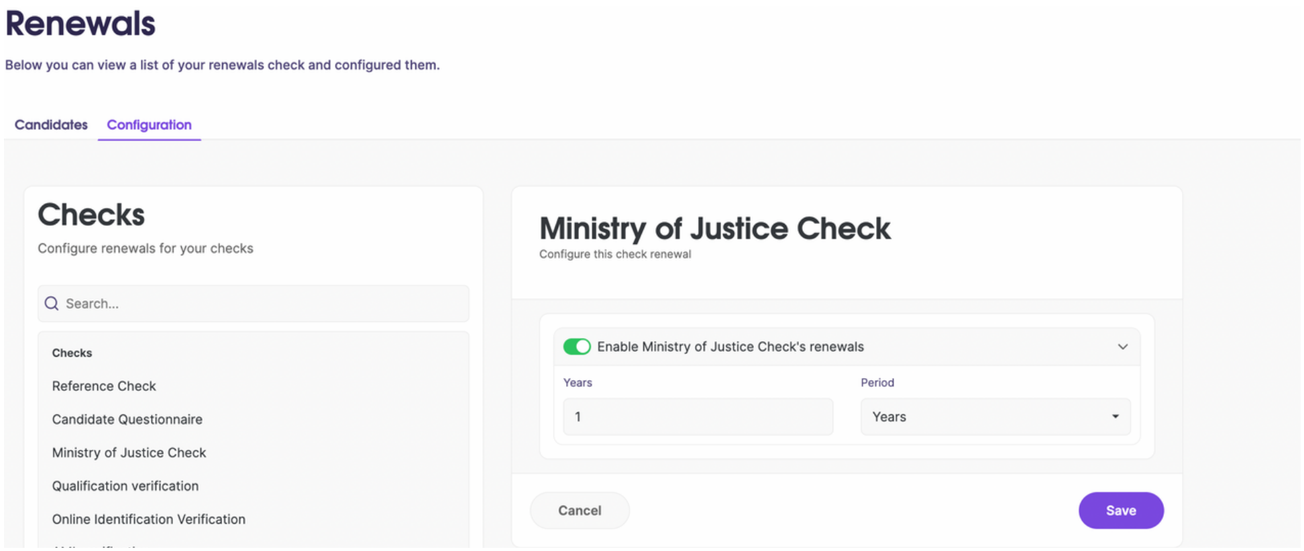
Checkmate is always growing and there may be lots of features you are not aware of.

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...



AI Reference templates

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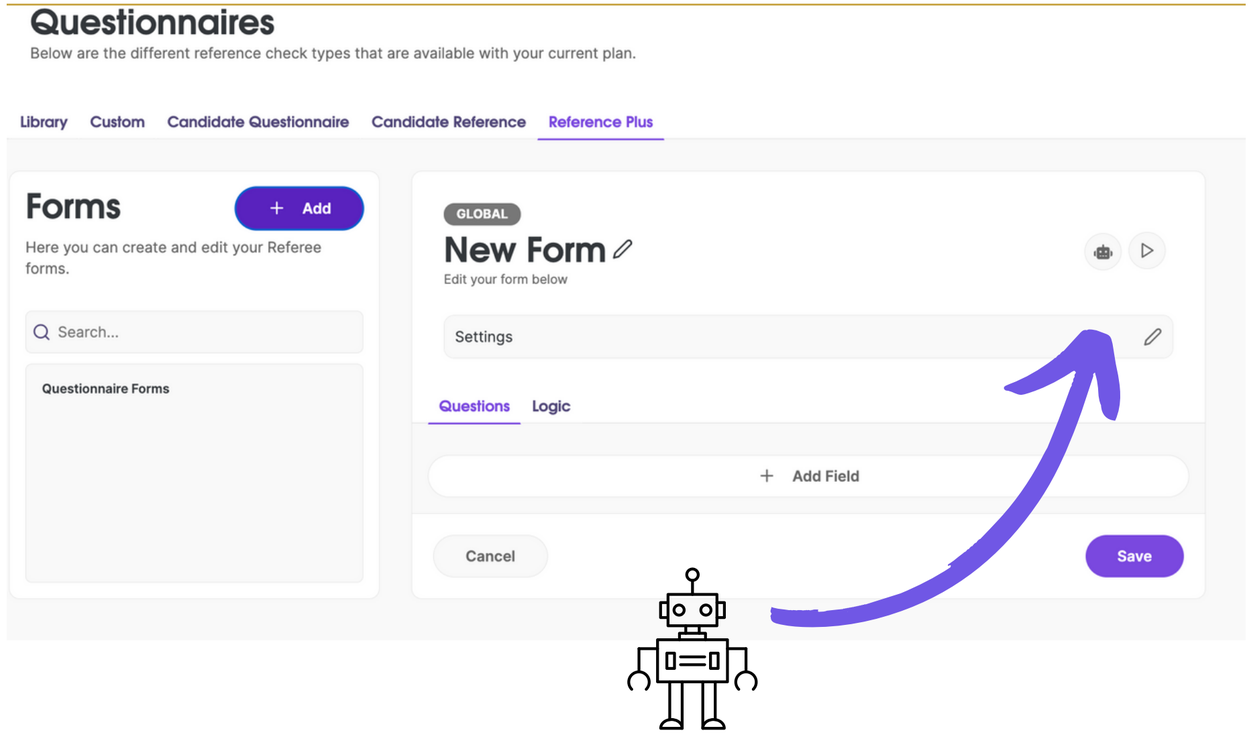
Please advise us if you want to have this feature turned on.

01 Go to questionairres > “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.



Food for thought...

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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 📞

Checkmate

01 Support Team > team@checkmate.tech

02 Features, Product, escalted 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