QUEST CE

"The self-pay program is perfect for clearing firms that require an independent payment plan."

Self-Pay Program

Our "Self-Pay" program gives our clients the ability to carry over the cost of services to their individual representatives. This enables firms to create varying lesson plans, per department or job function, at different price points. When one of these users signs into the system for the very first time, they will immediately be prompted to pay for their program, via credit card, before being able to access their compliance materials. Upon payment, their program will already come pre-loaded with the necessary services. Thereafter, firms can login to their administrative reporting dashboard to monitor exactly who has, and hasn't, completed their assigned coursework.

Step One: Create Self-Pay Groups

Assign users to a designated payment group. Groups can be categorized by department, branch or job function.

Name	Added	Modified
Human Resources	2/8/2017	2/9/2017
Independent Representatives	2/9/2017	N/A
Marketing	1/25/2017	2/9/2017
Sales	2/9/2017	N/A

Step Two: Create Self-Pay Plan

From here, you'll be able to create individual lesson plans, featuring such services as training, policies, questionnaires, etc.

Self-Pay Group
Marketing

Training	Catalog	Code
A Professionals Guide to Ethical Decision Making (FE)	Firm Element Training	0043
Conflicts of Interest (FE)	Firm Element Training	0103

Step Three: Have Users Login and Purchase Services

Upon login, all first time users will be prompted to pay for their assigned services, before gaining access to the system.

GRINGOTTS SECURITIES HAS OPTED FOR USERS TO PAY FOR THEIR TRAINING.

PLEASE PROVIDE PAYMENT TO ACCESS YOUR TRAINING.

Billing Information

Billable Total:	Name on Card	Credit Card #	Card Type
$40.00	150 characters left	20 characters left	Please Select