

# SmartAudit<sup>™</sup> Insight Main Tabs

# Content

DTiQ's customizable **SmartAudit**<sup>™</sup> consists of 10 questions that reveal how to improve your business operations. To use this feature, you must have an active 360iQ subscription. Contact **DTiQ Support** at <u>support@dtiq.com</u> or your **Customer Success Manager** at <u>csr@dtiq.com</u> to learn more.

**Note:** You can easily navigate throughout the audit by clicking on a specific question or incident.

In this guide, we will cover the following topics:

- 1. <u>Overview</u>
- 2. Location ranking
- 3. Audit list
  - o Filter panel
  - o Audit Report
  - o Manage Locations

To learn the basics of SmartAudit<sup>™</sup> Insight, see our guide on the SmartAudit<sup>™</sup> Insight Dashboard.

There are 3 main tabs for the **SmartAudit<sup>™</sup> Insight** dashboard that you can select at the top of the dashboard: **Overview, Location ranking**, and **Audit list**.

#### 1. Overview

The **Overview** provides insight into your overall audit question performance.

SmartAudit <sup>™</sup> Insight  ☐ Location	ns (59) 🖸	Last 7 days Last 30 days Last 90 days 🔂 ∨ 07/14/2024 → 08/12/2024 🗄					
Overview Location ranking	Audit list						
Audit count (i)	Benchmark ()	Average audit score	Loss Event Rate 🛈	Incident Rate ③			
<u>46</u> 192	80%	76.8% 1 2% vs.previous period (	<b>5</b> 4.17%	52.08%			
Loss Events ()	20	Violations ①	Speed of Service	(mm:ss) (0) 53			
8 1 2 vs. previous period (30 days)		462 \$\J 111 vs. previous period (30 days)	Counter	↑ 12:06			
Transactional Fraud Cash Theft 0 1 2 3 4	<b>↑</b> 4 5 6 7 8	Customer Experience Transactional Integrity	↑ 56 Drive-Thru ↑ 00:00 03	<b>00:25</b> 20 06:40 10:00 13:20 16:40			
Incidents ()	56	Service 140 Cleanliness					
100 ↓ 23 vs. previous period (30 days) Unauthorized Discount Policy	↓ 2	Safety 22 Employee 7 Standards 7 Operational 11					

At the top of the **Overview** page, you can view the following information:

- Audit count—the total number of audits conducted in a given timeframe.
- Benchmark—percentage considered as a passing score.
- Average Audit Score for your locations and compare it to the previous period as well as your company benchmark (the default benchmark setting is 80% and can be changed by contacting your CSM.
- Loss Event Rate—any event where DTiQ has identified a potential financial loss.
- **Incident Rate**—any event where DTiQ has identified a coaching opportunity to improve performance.

Analyzing and reviewing this data helps you identify areas for improvement. For example, you can view the **Average audit score** for your locations and compare it to the previous period, as well as your company **Benchmark**.

**Note: T**he default benchmark setting is 80% and can be changed by contacting your <u>CSM</u>.

Right below are charts of the number of times that **Loss Events**, **Violations**, and **Incidents** were found in a SmartAudit<sup>™</sup> along with a graph of **Speed of Service** measurements. Click on a single bar in any of the charts to go to the **Location ranking** tab.

## 2. Location ranking

The **Location Ranking** is a list of locations that are sorted by SmartAudit<sup>™</sup> scores by default.

The **Opportunities/Score** tab focuses on the SmartAudit<sup>™</sup> **Score** and the counts for **Loss Events**, **Incidents**, and **Violations**. By clicking on a single row in the table, you can view the **Audit list** tab for more audit details for the chosen location.

SmartAudit <sup>™</sup> Insight	tions (59) Q Audit list		Last 7 days <u>Last 30 days</u> Last	<b>90 days</b> 🔁 🗸 07/14/2024	→ 08/12/2024
Opportunities/Score Speed of Serv	vice				
Add filter V Sort by: Score 1 V	Group by Location			Search location name	Q 🗄 🖸
Location	↓ Score	Loss Events	Incidents	Violations	Details
	94% ↑ 43%	(© 0) 0 (0%)	( <u>)</u> ↓ 4 (100%)	(≦ 1 ↓ 25 (96%)	Ъ
	90.4% ↑ 18%	(© 0) ↓ 2 (100%)	( <u>)</u> ↓ 3 (100%)	(≚ 6 ↓ 4 (40%)	B
	<b>89.33%</b> ↑ 3%	<pre></pre>	( <u>)</u> 1 ↑ 1 (100%)	(≦ 3 ↓ 3 (50%)	B
	89.25% ↑ 0%	(6) 0 0 (0%)	<ul><li>○ ○</li><li>↓ 2 (100%)</li></ul>	(ă) 5 ↑ 1 (25%)	B
90.4% ↑ 18%	<ul> <li>(◎ ○)</li> <li>↓ 2 (100%)</li> </ul>	1	( <u>)</u> 0 (100%)		(≦) 6 ↓ 4 (40%)

Here, you can also compare every metric with a previous period. By default, this period covers the **last 30 days**, but you can also adjust the time period in the top right to **last 7 days** or last **90 days**.

Click the chart icon to see the details of a location's audit score and details regarding **Loss Events, Incidents, and Violations**.

Audit count ©	Benchmark	© %	Average aud	it score .4% % vs.previous p
Loss Event Rate ①	Incident Rat	e ()		
Loss Events ①	23	Violations ()		52
Loss Events () 0 ↓ 2 vs. previous period (30 days) Cash Transactions Fraud 0	25	Violations () 6 ↓ 4 vs. previou Cleanliness Safety Employee Stindrards	us period (30 days)	0 0
Loss Events () 0 ↓ 2 vs. previous period (30 days) Cash Trans Trans Fraud 0 Incidents () 0 ↓ 2 a period (20 days)	24   1 	Violations () 6 ↓ 4 vs. previou Cleaniness Safety Employee Standards Cash Handling Transactional Integrity 2 2	us period (30 days)	0

In the **Location** ranking tab, click the **Add filter** button to filter the table.

SmartAudit <sup>™</sup> Ins	sight 🖀 Location	s (59) 🕄
Overview	Location ranking	Audit list
Opportunities/Score	Strued of Service	
Add filter 🗸		
Sort by: Score ↑↓	~	Group by Location

Select the items of interest from the **Loss Event Type**, **Incident Type**, and **Violation Type** menus. Click the **Apply** button to apply the selected filters. To close the panel without any changes, click the **Add filter** button again.

You can reset all filters by clicking the **Reset** button.

Filter categories		Loss Event Type		Incident Type		Violation Type	
Opportunities	(0)	Q Search		Q Search		Q Search	
		Select all	Show Selected	Select all	Show Selected	Select all	Show Selecte
		Cash Theft		Missing Cash		Cash Handling	
		Transactional Fraud		Sweethearting		Cleanliness	
		Product Theft		Physical Injury		Transactional I	ntegrity
		Under-Ringing		Time Clock Fraud		Uniform Policy	
				Harassment		Safety	
				Workplace Violen	ce	Covid/Hygiene	

Click the **Speed of Service** tab to view information about the average and longest Speed of Service for a given location.



The Speed of Service type is set to **Counter** by default. You can change the type via the **drop-down menu**.



### 3. Audit List

The **Audit list** lets you explore the full list of audits performed for a given time range for all your locations, including information about the number of **Loss Events**, **Incidents**, and **Violations**, along with Speed of Service times and audit score.

SmartAudit <sup>™</sup> Insight  ☐ Locations	<b>59 0</b>			Last 7 days	<u>Last 30 days</u>	Last 90 days 🗄 🗸	07/14/2024 →	08/12/20	24	
Overview Location ranking	Audit list									
Add filter V Sort by: Loss Events 1						Search location name	٩		ð Ł	
Location	(i) Audit Date	Created Date	↓ Loss Events	Incidents	Violations	(i) Speed of Service	Score		Actions	
	08/08/2024 01:29:52 PM	08/09/2024 10:20:11 AM	<b>()</b> 2	<u>()</u> 1	<b><u><u></u></u></b> <u></u>	( Drive 02:54	66%	ଡ	¥ 💿	
	08/03/2024 01:01:37 AM	08/09/2024 08:41:10 AM	<b>()</b> 1	<u>()</u> 1	2	( Drive 03:57	72%	ଡ	<b>⊁</b> ⊚	
	07/29/2024 05:15:33 PM	08/02/2024 11:14:46 AM	<b>()</b> 1		<b><u><u></u></u></b> <u></u>	Ocunter 06:05	66%	ଡ	⊻ ⊚	
	07/28/2024 01:53:40 PM	08/02/2024 07:21:28 AM	<b>()</b> 1		2	Ocunter 02:43	78%	ଡ	¥ ⊚	
	07/27/2024 09:00:48 PM	07/29/2024 06:07:29 AM	<b>1</b>		<b>i</b> 5	Ocunter 04:57	50%	ø	¥ 💿	
	07/21/2024 11:08:25 PM	07/24/2024 08:37:18 AM	<b>()</b> 1		<b>É</b> 4	Ocunter 05:44	53%	ଡ	¥ 💿	
	07/17/2024 12:43:08 AM	07/18/2024 11:34:03 AM	<b>()</b> 1		<u><u> </u></u>	Ocunter 05:09	56%	Ø	¥ ⊚	

To see more details, click the icons with counts.

↓ Loss Events	Incidents	Violations	(i) Speed of Service
③ 2	<u>0</u> 1	۵ 🖄	() Drive 02:54

In the **Actions** column, you will see the following symbols:



- 1. Link—copy a link to the SmartAudit<sup>™</sup> report.
- 2. **Download**—download a PDF version of the SmartAudit<sup>™</sup> report.
- 3. **Preview**—view the SmartAudit<sup>™</sup> report in your web browser.

To download multiple SmartAudit<sup>™</sup> reports, mark checkboxes on the left side. Then, click the **Download marked** button right above the table.

	Add filter $\checkmark$	
١	Download marked (2)	
١	Location	

As you enter the **Audit list** page, audits are sorted by **Audit date**. To change this sorting, use the **Sort by** drop-down or the **arrow icons** in the table headers.



#### Filter panel

To filter the table, click the **Add filter** button.



Select one of the **Filter categories** on the left side of the screen. Next, select the specific items of interest in the menu(s) next to **Filter categories**. To apply the selected filters, click **Apply**.

Filter categories		Loss Event Type
Location	(2)	Q Search
Opportunities	(3)	Select all Show Selecter
Speed of Service	(0)	Cash Theft
Audit details	(0)	Transactional Fraud
		2 🗹 Product Theft
		Under-Ringing

#### Audit Report

To view a single SmartAudit<sup>™</sup> report, click the **eye** icon. The report window will open.

Audi	tReport					×
		Report actions	uestion	🖉 Link 🛃 Download PDF		
) Ad	dress		🖬 Sc	ore	🛗 Au	dit date
			<b>91%</b> (29	9/32)	9/3/2024 0	6:41:45 AM
🖭 Re	port ID	Auditor				
SmartA	SmartAudit™ #120070					
🕛 Sp	eed of Service (mm:ss)					
Counte	if .					03:49
No.	Question				Answer	Points
1	1 Were the 'front of house' floors, counters, tables, chairs, and trash receptacles clean and free of debris?				Yes	2/2
2	2 Were the 'back of house' floors, counter, and prep areas clean and free of debris?				Yes	2/2
3 Were customer orders served within company time requirements?				4/4		
4 Were employees dressed according to company policy? I No 0/1				0/1		
5	Did all employees follow food safety practices while handling food?				Yes	3/3
6	Were purchased items accurately rung into the Point of Sale?				Yes	5/5

**Note:** All audit questions with "N/A" answers are counted in the average score and rated 0%.

When you open a report, 4 buttons are displayed:

- 1. **Report actions**—log actions you have taken based on the SmartAudit<sup>™</sup> report.
- 2. Send question—send any question(s) directly to auditors.
- 3. **Link**—copy the report link to the clipboard.
- 4. **Download PDF**—download the report as a PDF file.



#### Manage Locations

To set global filters for the dashboard, click the **Locations** button at the top of the screen. A menu will pop up.



From here, you can choose locations, create a location group with the selected filters, and click **Apply** to save your changes.

	Location groups
7/14/2024	
	Q Search
	Locations
Q	
	SHOW SEI ECTED
_	
	SAVE GROUP
_	LOCATION GROUPS
	Q Search
	C Examen
_	
_	
_	
_	
_	EDIT NAME DELETE
_	
	CANCEL CLEAR APPLY

For additional information or questions please contact <u>DTiQ Support</u> at <u>support@dtiq.com</u> or your <u>Customer Experience Team</u> at <u>csr@dtiq.com</u>.



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