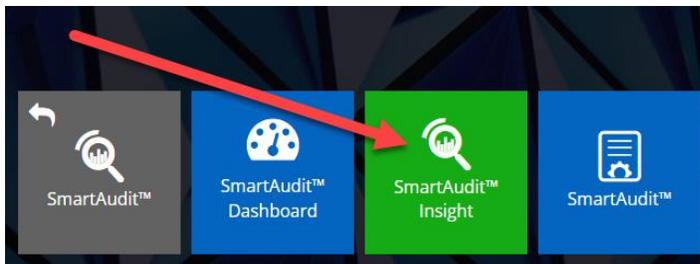
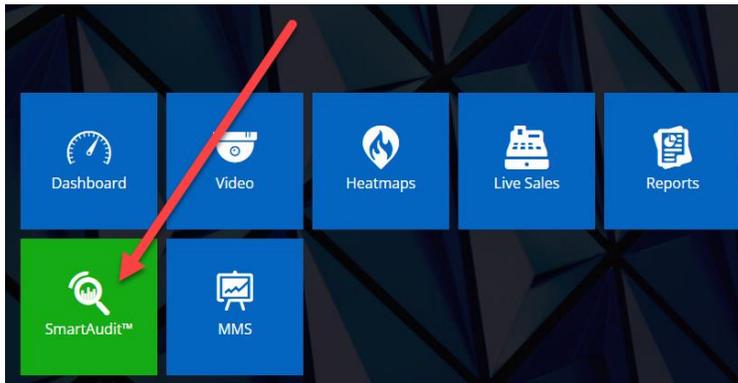




SmartAudit™ Insight Dashboard

A **SmartAudit™** is a customizable 10-question remote audit that provides insights on how to improve your business operations. The SmartAudit™ feature requires an active subscription. Contact **DTIQ Support** at support@dtiq.com or your **Customer Success Manager** at csr@dtiq.com to learn more.

The **SmartAudit™ Insight** dashboard allows you to analyze operational trends affecting your business performance. To access it, click on the **SmartAudit™** tile from your **Home Screen**, and then choose the **SmartAudit™ Insight** tile.



The **SmartAudit™ Insight** dashboard consists of 3 main sections with different levels of data aggregation.

You can access them by clicking on one of the main tabs: **Overview**, **Location Ranking**, and **Audit List**.

Content

In this guide, we will cover the following topics:

- [Location Groups](#)
- [Date Selection](#)
- [Generate Aggregated Reports](#)
- [Generate Incident Reports](#)
- [Generate Violations Reports](#)

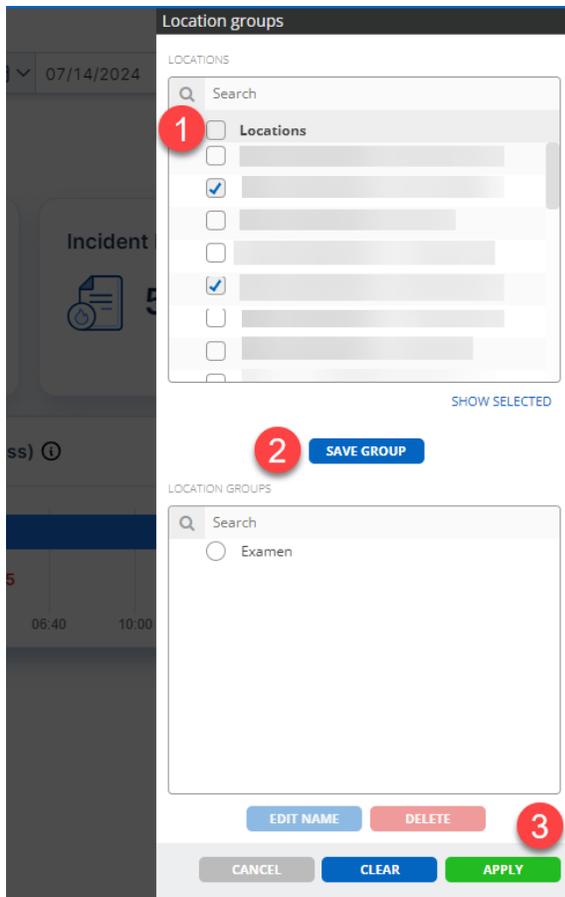
To learn more about SmartAudit™ functionality, read our SmartAudit™ Insight Main Tabs guide.

Location Groups

Clicking on the **Locations** button takes you to the **Location groups** view, where you can define groups covering the selected locations. These groups let you filter data according to the range of locations defined by the group.

To create a **Location group**:

1. Choose **Locations** you wish to add to the group.
2. Click the **SAVE GROUP** button and name the group.
3. Click the **SAVE** button and then the **APPLY** button.



You can also edit (**EDIT NAME** button) or delete (**DELETE** button) location groups.

The Location groups view includes also the following buttons:

- **CANCEL**, which closes the current view.
- **CLEAR**, which removes saved filters.
- **APPLY**, which saves the changes.



Date Selection

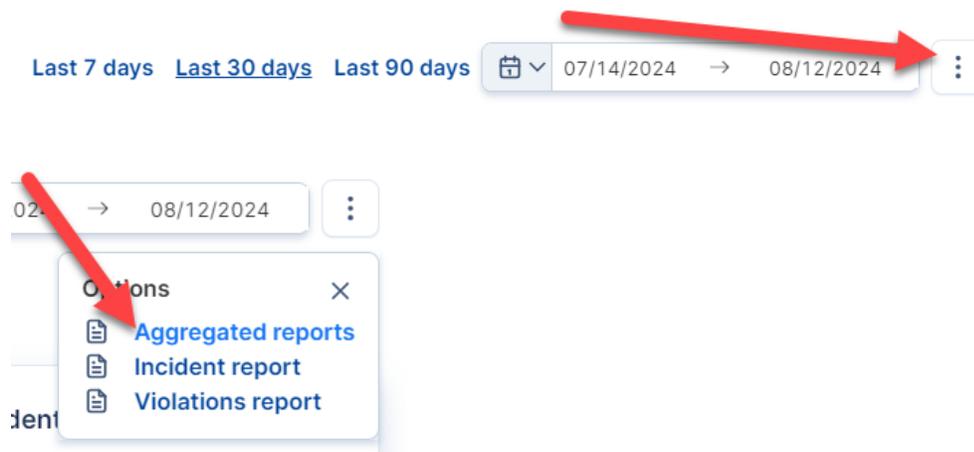
When you enter **SmartAudit™ Insight**, the results will be displayed for the **last 30 days** by default.

If you are looking for a different date range, go to the top right corner and select **Last 7 days** or **Last 90 days**, or use the **custom date selector** to choose a different range.



Generate Aggregated Reports

Next to the **custom date selector**, you will find the **three dots** (more) icon. To generate an aggregate report, click the **more** icon, then click **Aggregated reports**.



The **Generate aggregated reports** window will open. You can choose from various unique report options to suit your needs, including a **Focus report**, **Comparison report**, **Detail report**, and **Trend report**. When you are ready to move on, click **Next**.

Generate aggregated reports

1 — 2 — 3 — 4

Choose type of report

Focus report Average question scores for time range and locations.	Comparison report Average location scores for time range.	Detail report Summary of all audits for time range and locations.	Trend report Summary of all audits for time range and locations grouped by months.
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File type

Generate as Excel file *.xlsx

Generate as PDF file *.pdf

Cancel Next

Select your desired time range. Then, click **Next**.

Generate aggregated reports



1

2

3

4

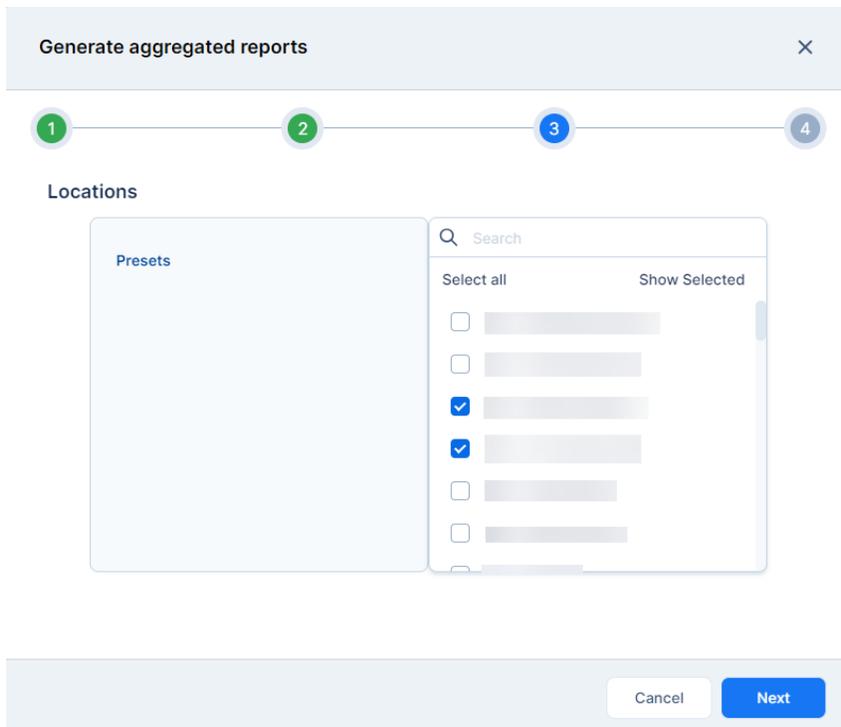
Time range

July 2024							August 2024							Quick select
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	
1	2	3	4	5	6	7	29	30	31	1	2	3	4	Today
8	9	10	11	12	13	14	5	6	7	8	9	10	11	Yesterday
15	16	17	18	19	20	21	12	13	14	15	16	17	18	This week
22	23	24	25	26	27	28	19	20	21	22	23	24	25	Last 7 days
29	30	31	1	2	3	4	26	27	28	29	30	31	1	Last 30 days
														This month
														Last month
														This quarter
														This year
														Custom range

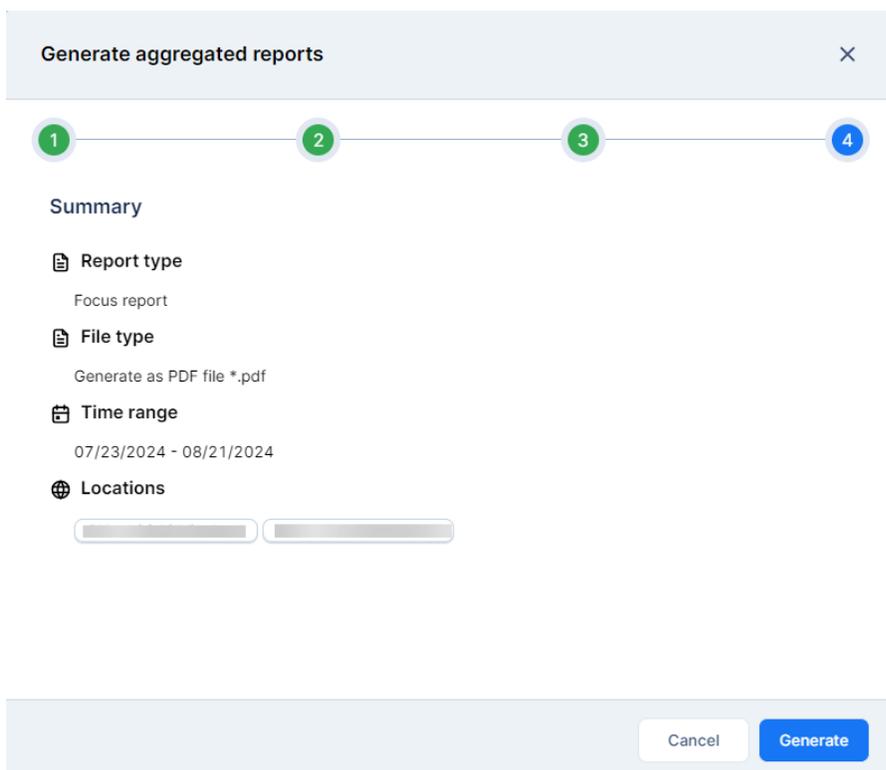
Cancel

Next

Choose your desired **Locations**. Click **Next** to move on to the final step in the report generation process.



In step 4, review the **Summary** and make any necessary changes. Hit **Generate** to compile the report.



Once your aggregated report has finished processing, it will look something like this:

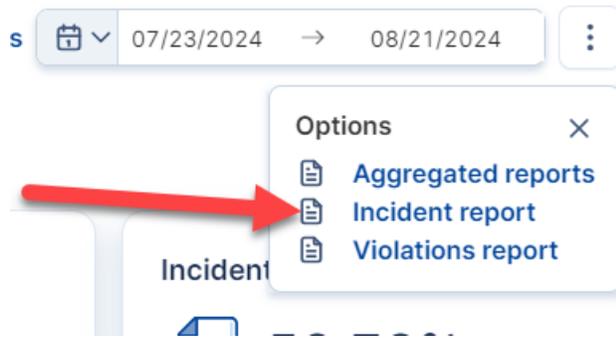


Focus Report		From: 08/18/2024 To: 08/21/2024		
Locations (4): 				
Question:		Yes	No	N/A
Q1	Were the 'front of house' floors, counters, tables, chairs, and trash receptacles clean and free of debris?	100.00% (1)	0.00% (0)	0.00% (0)
Q2	Were the 'back of house' floors, counter, and prep areas clean and free of debris?	100.00% (1)	0.00% (0)	0.00% (0)
Q3	Were customer orders served within company time requirements?	0.00% (0)	100.00% (1)	0.00% (0)
Q4	Were employees dressed according to company policy?	100.00% (1)	0.00% (0)	0.00% (0)
Q5	Did all employees follow food safety practices while handling food?	100.00% (1)	0.00% (0)	0.00% (0)
Q6	Were purchased items accurately rung into the Point of Sale?	100.00% (1)	0.00% (0)	0.00% (0)
Q7	Was all cash properly secured?	100.00% (1)	0.00% (0)	0.00% (0)
Q8	Did the location use best Safety Practices?	100.00% (1)	0.00% (0)	0.00% (0)

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

Generate Incident Reports

Below the **Aggregated reports** option, you will see an option to generate an **Incident report**. Click it.

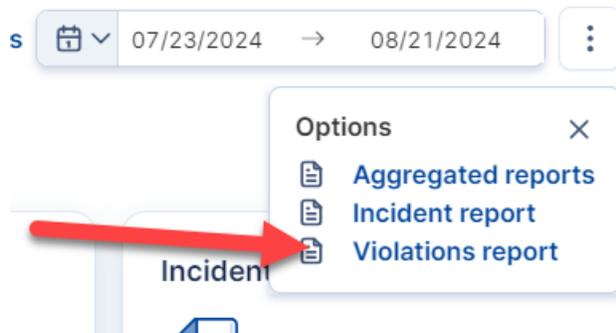


The **Incident report** will be downloaded to your computer as an **.xlsx** (Excel) file. You will most likely find it in your **Downloads** folder. Once opened, the report should look something like this:

	A	B	C	D	E	F	G	H
1	Brand	Location	City	State	Audit Date	Incident	Latest Action	Score
2			Chester	New Jersey	8/21/2024 03:00:27 PM	Suspicious Activity		75.00%
3			Galloway	New Jersey	8/20/2024 03:25:54 PM	Policy Violation		88.00%
4			Clark	New Jersey	8/20/2024 08:40:37 AM	Unauthorized Discount		47.00%
5			Clark	New Jersey	8/20/2024 08:40:37 AM	Employee Productivity		47.00%
6			Goshen	NY	8/18/2024 11:20:04 PM	Unauthorized Discount		66.00%
7			PLEASANTVILLE	New Jersey	8/18/2024 04:52:17 PM	Transactional Fraud		59.00%
8			Vernon Township	New Jersey	8/18/2024 01:19:48 PM	Policy Violation		69.00%
9			Vernon Township	New Jersey	8/18/2024 01:19:48 PM	Unauthorized Discount		69.00%
10			Vernon Township	New Jersey	8/18/2024 01:19:48 PM	Unauthorized Discount		69.00%
11			Vineland	New Jersey	8/18/2024 11:10:54 AM	Grazing		59.00%
12			Vineland	New Jersey	8/18/2024 11:10:54 AM	Transactional Integrity		59.00%
13			Middletown	NY	8/18/2024 10:22:01 AM	Unauthorized Discount		62.00%
14			Union City	New Jersey	8/18/2024 07:25:30 AM	Transactional Integrity		62.00%

Generate Violations Reports

To generate a **Violations report**, choose it from the list of report options.



The **Violations report** will be downloaded to your computer as an **.xlsx** (Excel) file. You will most likely find it in your **Downloads** folder. Once opened, the report should look something like this:

	A	B	C	D	E	F	G	H
1	Brand	Location	City	State	Audit Date	Violation	Latest Action	Score
2			Chester	New Jersey	8/21/2024 03:00:27 PM	Customer Experience		75.00%
3			Chester	New Jersey	8/21/2024 03:00:27 PM	Operational Standards		75.00%
4			Chester	New Jersey	8/21/2024 03:00:27 PM	Transactional Integrity		75.00%
5			Galloway	New Jersey	8/20/2024 03:25:54 PM	Cash Handling		88.00%
6			Clark	New Jersey	8/20/2024 08:40:37 AM	Counter Service		47.00%
7			Clark	New Jersey	8/20/2024 08:40:37 AM	Customer Experience		47.00%
8			Clark	New Jersey	8/20/2024 08:40:37 AM	Employee Standards		47.00%
9			Clark	New Jersey	8/20/2024 08:40:37 AM	Safety		47.00%
10			Clark	New Jersey	8/20/2024 08:40:37 AM	Transactional Integrity		47.00%
11			Park Ridge	New Jersey	8/19/2024 06:30:40 PM	Customer Experience		94.00%
12			Goshen	NY	8/18/2024 11:20:04 PM	Customer Experience		66.00%
13			Goshen	NY	8/18/2024 11:20:04 PM	Safety		66.00%
14			Goshen	NY	8/18/2024 11:20:04 PM	Transactional Integrity		66.00%
15			Edison	New Jersey	8/18/2024 04:57:38 PM	Counter Service		81.00%

For additional information or questions please contact [DTiQ Support](mailto:support@dtiq.com) at support@dtiq.com or your [Customer Experience Team](mailto:csr@dtiq.com) at csr@dtiq.com.



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