



Training Manual

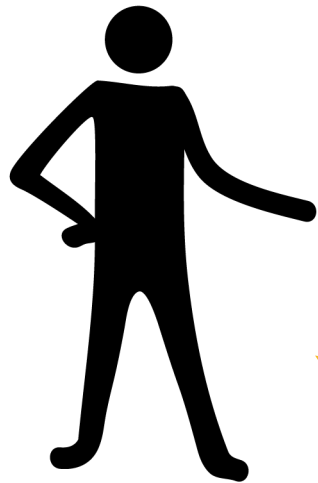
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Introduction

The Counter Tools Store Audit Center is a comprehensive, paperless solution for planning and conducting data collection campaigns in the retail environment. It integrates team and campaign management, mobile data collection, and data reporting into an easy to use, web-based system.

There are two roles in the Store Audit Center:



1.

COORDINATOR

- A. Sets up a team
- B. Enters or imports store information
- C. Builds a customized audit form
- D. Assigns stores to team members
- E. Sends audit invites to team members
- F. Manages audit data and generates reports

**Uses a
computer**

TEAM MEMBERS

- A. Receive store audit invitation emails
- B. Audit the assigned stores either on paper or using an Internet-enabled mobile device

**Use
mobile
devices**

2.



Here are the six basic steps to using the Store Audit Center:

STEP 1: CREATE A TEAM

The coordinator gives their team a name and location, and then adds the names and emails for the team members.

STEP 2: ADD STORES

The coordinator enters or imports names and addresses of stores to audit. Once entered, stores are conveniently displayed on a Google map.

STEP 3: BUILD AN AUDIT FORM

The coordinator builds a customized audit form for the team to use in the field, using premade modules focusing on a variety of aspects of the store environment.

STEP 4: SET UP A CAMPAIGN

The coordinator creates a campaign, which brings together team members, stores, and an audit form into a focused data collection effort. Team members can be assigned specific stores to audit.

STEP 5: COLLECT DATA

The coordinator sends out an invitation email to team members, informing them which stores they've been assigned to audit. A team member can then either download a printable form or perform the audit on a mobile device. Team members complete the audit form at each location, and the data is automatically saved by the system when the form is submitted.

STEP 6: GET AN EXPORT

Data from an audit form can then be viewed or downloaded by the coordinator as a spreadsheet.

Getting Started



Go to <http://assess.countertools.org> and click **Login** to enter your assigned username and password. On the Login page, you'll also see tabs that allow you to request a new password if you've forgotten your password or would like to change it.

Use the **Black Menu Bar** to navigate the site

For an optimal experience, please use the most recent version of your browser.

TIP

Coordinator work should be done on a computer, rather than on a mobile device.

Dashboard

The **Dashboard** is your homepage. If you get lost or confused, you can always return to your dashboard and start again from there.

Your dashboard provides statistics on the number of campaigns created and audits performed by *all* Store Audit Center users. It also offers quick links to **Common Tasks** such as adding a team member or selecting a campaign to view.

On the right side of each page on the Store Audit Center, you'll see links for **changing your password**, **viewing your account details**, and **logging out**. In addition, you'll see a font size control, which allows you to make the page text larger or smaller by clicking the **Aa icons**.



Step #1: Create A Team

The first step in using the Store Audit Center (before you can do anything else) is to set up your team. Click on **My Team** in the black menu bar to get to the My Team page. Enter a team name, city, and state into the **Team Information** section to set up your team.

MY TEAM

TEAM DETAILS

Team Name *
Kick Butts Bedrock

City
Bedrock

State
- None -

SAVE TEAM **DELETE**

Add members to your team by entering their information into the **Add A Member** section and decide whether you want them to be **Active** or **Inactive** – if they're Inactive, they won't get emails from the Store Audit Center. You can also use the **Email My Team** section to contact your entire team at once.

TEAM MEMBERS

Name	Email	Phone	Status	# Audits	Options
Barney Rubble	barney@flintstones.com		Active		Edit Delete
Betty Rubble	betty@flintstones.com		Active		Edit Delete
Fred Flintstone	fred@flintstones.com		Active		Edit Delete

ADD A MEMBER

Name: *
Pebbles Flintstone

Email:
pebbles@flintstones.com

Phone:

Status: *
☒ Active
☐ Inactive
☐ Send welcome email (if email provided)

SAVE

TIP

1. Add yourself as a team member to start
2. Use email addresses that can easily be accessed from a mobile device

Step #2: Add Stores



Next, using the black menu bar, go to the **Stores** page to add the location of the stores you want your team to audit. Stores can be added one at a time using the **Add a Store** section. Simply type the name of the store and the complete address and save the store to the list. Or you can batch upload a list of stores.

To upload a list of stores:

1. Click the **Batch upload stores** link below the **Add a Store** section
2. Click the **Excel template** link on the **Import Stores** page to download the template
3. *In Excel:* Paste your list of store names and addresses into the template; make sure that the pasted information matches the columns in the template and save it as a .xls file
4. On the **Import Stores** page, click the **Choose File** or **Browse** button to locate your spreadsheet
5. Click the **Import Stores** button

TIP

In order to upload, save your spreadsheet as an Excel 97-2004 file (.xls)

After entering or uploading your stores, they will show up on a Google map. The complete list of stores can be downloaded as a spreadsheet by clicking on the **Export stores to Excel** link at the bottom left corner of the **Store List** section.

Title	Street	City	State	Zip Code	Last Audited	# Audits	Options
Carboro Food Mart	207 W Main St	Carboro	NC	27510		0	Edit Delete
Carboro Mini Mart	502 W Main St	Carboro	NC	27510		0	Edit Delete
Carr's Meat Market	100 W Main Street	Carboro	NC	27510		0	Edit Delete
Short Stop	300 W Main St	Carboro	NC	27510		0	Edit Delete
T.J.'s Beverage and Tobacco	306 E Main St	Carboro	NC	27510		0	Edit Delete



Step #3: Build An Audit Form

Once you've added stores, go to the **Audit Forms** page in the black menu bar where you'll create your own store audit form. Each audit form is made up of premade modules that are groups of questions tailored by Counter Tools for specific clients or topic areas.

Adding a new form:

1. Under **Add a Form**, give the form a name
2. Select a module from the drop-down menu
3. Click **Add Another Item** to add another module if desired
4. Click **Create Audit Form** when you are finished

You can reorder the modules by clicking the cross icon next to a module and dragging it to a different location.

Once you've created your audit form, it will appear in the **My Forms** section of the Audit Forms page. From there you can:

Edit, Delete or Preview the form on your browser

Export an Excel spreadsheet of all the data collected using that audit form

MY FORMS			
Audit Title ▲	# Campaigns Using	# Audits	Options
Kick Butts Bedrock	0	0	Edit Delete Preview Print (PDF) Export

TIP

Spreadsheets generated from the Audit Forms page will display aggregated data collected by every team member on your team who used that form in a campaign

Get a PDF version of the form using **Print**

Step #4: Set Up a Campaign



The fourth step in coordinating store audits is creating a Campaign. Go to the **Campaigns** page using the black menu bar. Here you will create a campaign, which brings together team members, stores, and an audit form into a focused data collection effort. Campaigns are often organized around a particular geographic area (e.g., county or city) or data collection period.

Creating a Campaign:

1. Select a name for your campaign under the **Add a Campaign** section
2. Modify the start date if needed
3. Choose the audit form you want to use for the campaign
4. Choose whether or not team members may add stores
 - **Team Members may add stores** lets you decide whether team members can add and audit new stores while in the field
5. Enter instructions for your team members if desired – these will show up in the invitation emails that you will send to your team members
6. Click **Create Campaign** when you are finished

ADD A CAMPAIGN

Title *
Cobblestone County 1

Start Date
Month Day Year 2

Audit Form *
- Select a value - 3

Auditors may add stores * 4
☐ No
☐ Yes

Instructions 5

CREATE CAMPAIGN 6

If you have multiple campaigns, be strategic about your campaign naming convention; It will make it easier to manage them later

TIP

Assigning Stores to Team Members:

MY CAMPAIGNS

Campaign	Start Date	Audit Form	# Stores	# Audits	Options
Cobblestone County	1	Kick Butts Bedrock	3	0	Edit Delete Print (PDF) Invite Do Audits View Audits Export

- Click on the name of the campaign in the **My Campaigns** section; this will take you to the **Store Assignments** page
- Go to the **Create New Store Assignments** section
- Add one or more stores from the **Stores** sub-section
 - You can click on the **Add** button to the right of each store address
- Add one or more team members in the **Team Members** sub-section
 - You can click on the **Add** button to the right of each team member
- The stores and team members you've added will move down into a **You have selected** area; Verify your selections before creating the assignments
- Click **Make Assignments** to add selections to **Current Store Assignments**

If you have a large number of stores and/or team members, you can narrow the list using the filter fields at the top of each column by typing in text and clicking apply. You can clear filters by deleting the text from the field or clicking the **Reset** button. The list can also be sorted by clicking on any of the column names.

CREATE NEW STORE ASSIGNMENTS

This will allow you to assign one or more team members to one or more stores for this campaign. You will create individual assignments that you can go back and remove or edit individually as needed.

Stores

You can filter what stores appear by entering keywords in the boxes below each column title. Click column titles to sort.

Name	Street	City	State	Zip	Options
Carrboro Mini Mart	502 W Main St	Carrboro	NC	27510	Clear Filter Add All
Short Stop	300 W Main St	Carrboro	NC	27510	Add
T.J.'s Beverage and Tobacco	306 E Main St	Carrboro	NC	27510	Add

You have selected:

Name	Street	City	State	Zip	Options
Carrboro Food Mart	207 W Main St	Carrboro	NC	27510	Remove All
Cliff's Meat Market	100 W Main St	Carrboro	NC	27510	Remove

Team Members

You can filter what members appear by entering keywords in the boxes below each column title. Click column titles to sort.

Name	Email	Status	Options
Pebbles Flintstone	pebbles@flintstones.com	Active	Clear Filter Add All
Fred Flintstone	fred@flintstones.com	Active	Add

You have selected:

Name	Email	Status	Options
Barney Rubble	barney@flintstones.com	Active	Remove All
Betty Rubble	betty@flintstones.com	Active	Remove

[MAKE ASSIGNMENTS](#)

CURRENT STORE ASSIGNMENTS

Below are the current store assignments for this campaign, sorted by team member. To sort by another column, click on its title. To delete assignments, check as many as you like (or all, using the checkbox at the top), and click Delete Selected.

<input type="checkbox"/>	Assigned To ▲	Store	Street	City	State	Options
<input type="checkbox"/>	Barney Rubble	Cliff's Meat Market	100 W Main St	Carrboro	NC	Edit Delete
<input type="checkbox"/>	Barney Rubble	Carrboro Food Mart	207 W Main St	Carrboro	NC	Edit Delete
<input type="checkbox"/>	Betty Rubble	Carrboro Food Mart	207 W Main St	Carrboro	NC	Edit Delete
<input type="checkbox"/>	Betty Rubble	Cliff's Meat Market	100 W Main St	Carrboro	NC	Edit Delete

DELETE SELECTED

The **Current Store Assignments** section displays the current assignments for the campaign. You can sort the assignments by clicking on any of the column headings. To delete an assignment(s), check the box to the left of it and then click the **Delete Selected** button.

After your assignments have been made, return to the Campaign page. In the **My Campaigns** section, for each campaign you will be able to:

MY CAMPAIGNS						
Campaign	Start Date	Audit Form	# Stores	# Audits	Options	
Cobblestone County		Kick Butts Bedrock	3	0	Edit Delete Print (PDF) Invite Do Audits View Audits Export	

Edit or Delete the campaign

p. 10

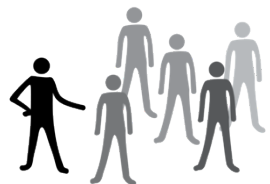
p. 12

Export an Excel spreadsheet of all the data collected in the campaign

Get a PDF version of the audit form to Print

View, edit or delete individual audits

How to **Invite** team members to collect data and **Do Audits** will be covered in the next section



Step #5: Collect Data

There are two ways to collect data using the Store Audit Center: on a mobile device in the field or on a paper audit form to be entered into the system at a later time. In order for a team member to begin collecting data, they must first be invited.

SEND AN INVITATION

To send an invitation, please choose one or all members and enter a subject and message in the space provided.

You are welcome to use the following tokens in the subject and/or body which will be replaced by actual values: %MEMBER_NAME%, %CAMPAIGN_NAME%, %FORM_URL%, %PDF_URL%, %START_DATE%, %INSTRUCTIONS%, %STORE_LIST%, %COORDINATOR%, %COORDINATOR_EMAIL%

Team Member: *
 (All Campaign Members) 3

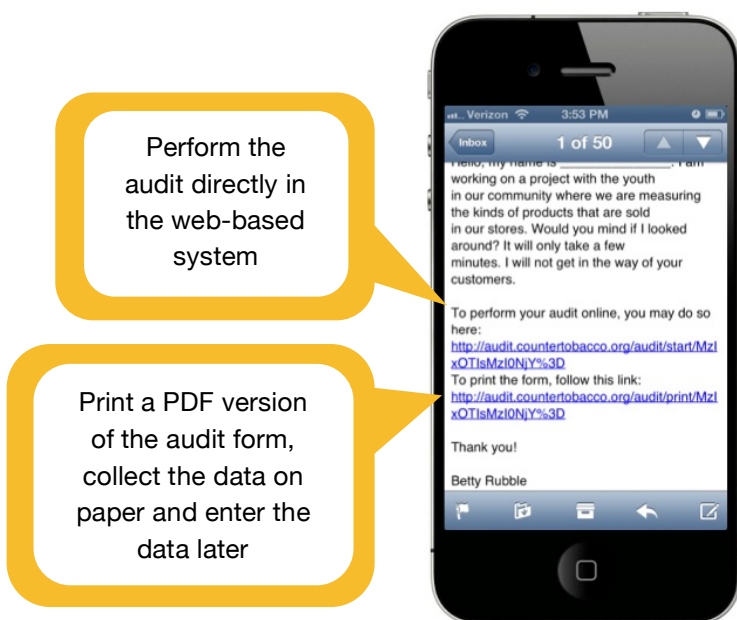
Subject: *
 Ready to audit? 4

Message: *
 Hello %MEMBER_NAME%--
 We're getting ready to kick off our audit campaign "%CAMPAIGN_NAME%" on %START_DATE%. You will be collecting data on tobacco advertising and promotion in stores. Currently, your assignments include:
 %STORE_LIST%

CANCEL SEND INVITATION 5

To invite your team members to start an audit:

1. Go to the Campaigns page in the black menu bar
2. Click the **Invite** link in the **My Campaigns** section
3. On the invitation page, using the **Team Member** drop-down menu, choose if you want to send invitation emails to all team members who have stores assigned to them or choose one team member to send an invitation to
4. If you wish, customize the subject and/or text of the email in the **Message** section; the message is already set to automatically fill in the names and campaign details
5. Click **Send Invitation** when you're done



The team member(s) will receive an email with a list of stores with clickable links that will open in the mobile device's maps application. Additionally, the email will contain customized links that allow them to access the Store Audit Center to perform their audits, or get a printable audit form.

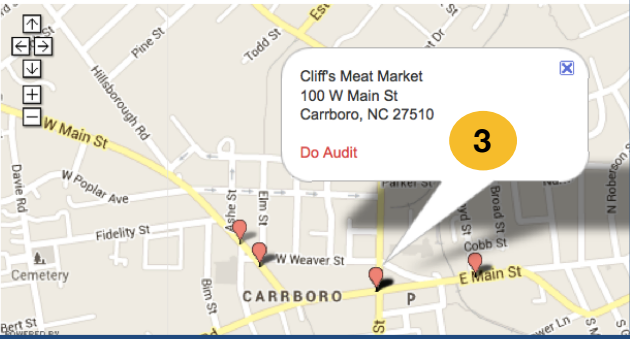
Mobile Data Collection

1. Click on the link in the email to perform audits online
2. View a map with the stores to be audited and click on the individual map pins or
 - a. Click **View List** link above the map to display the stores to be audited as a list, which can be helpful on mobile devices
3. Below the address of each store that's been assigned to a team member—and hasn't yet been audited—is a **Do Audit** link; Click this link and start the audit for that store
4. Click **Next** to move to the next module, or **Previous** to move to the previous module
5. Click **Submit** when you have reached the end of the audit form

COBBLESTONE COUNTY 2

[View Map](#) [View List](#)

Please choose a store by clicking on the marker on the map:



Cliff's Meat Market
100 W Main St
Carrboro, NC 27510
[Do Audit](#) 3

COBBLESTONE COUNTY 2a

[View Map](#) [View List](#)

Please choose a store:

Carrboro Mini Mart
502 W Maint St
Carrboro, NC 27510
Enter audit as **Barney Rubble**

Cliff's Meat Market
100 W Main St
Carrboro, NC 27510
Enter audit as **Betty Rubble** 3

TJ's Beverage and Tobacco
306 E Main St
Carrboro, NC 27510
Enter audit as **Fred Flinstone**

KICK BUTTS BEDROCK

Page 1 of 3 (0%)

Exterior Advertising

Are there any exterior tobacco ads?(if No, skip to end of module):

☐ Yes
☐ No

Exterior advertising-parking lot/property

Indicate the number of ads in the parking lot/property that are:

Mentholt:

Enter "0" if none

Non-menthol:

Enter "0" if none

[NEXT](#)

A **Progress Bar** will be at top if using multiple modules; click **Submit** when done

If you selected the **Team Members may add stores** option when you set up the campaign (p. 7), the team member will see the **Add a Store** section at the bottom of the page. This allows the team member to input the information for a new store to be audited. By entering the store information and clicking **Create Store**, the store will be added to the list and the map. To audit the new store, the team member will click on the pin on the map or select the store from the list view and click the **Do Audit** link.

After entering data for the store, the team member will be taken back to the audit selection page where they can choose or add a new store to audit if desired. After completing the audit, the link to enter the audit as that team member will disappear from the list and be replaced by the date and time it was audited.

Paper Data Collection

To collect data using paper forms, team members can click on the email link to print the form. This will generate a PDF file of the campaign's audit form with the campaign name at the top, as well as blanks for entering the team member's name, the date and time of collection, and the name of the store being audited. The data from stores can be collected on paper using this form and then entered by the team member on a computer using the directions from the mobile data collection section above. Alternatively, the Coordinator can go to My Campaigns, print the forms and follow the steps below when entering the data:

1. Go to the **Campaigns** page in the black menu bar
2. Click on the **Do Audit** link to the right of the name of your campaign
3. Enter an audit by clicking the link with the assigned team member's name
 - a. Use either the map or the list view
4. Enter data from the paper audit form for that particular store in the web-based form
5. After completing the audit, the link to enter the audit as that team member will then disappear from the list and be replaced by the date and time it was audited.

If the paper data you're entering is from a store that isn't already in your campaign, click the **Do Audit** link as above and enter the store name and address into the **Add a Store** section at the bottom of the page. Choose the team member who completed the audit from the **Acting as Team Member** drop-down menu, and click the **Create Store** button to create the store. Select the store from the map or the list to enter the audit.

Managing Your Team's Data Collection

Editing a completed audit:

1. Go to the **Campaigns** page using the black menu bar
2. Click the **View Audits** link to the right of the campaign containing the audit
3. On the **Campaign Audit Submissions** page, click the **Edit** link to the right of the audit you want to edit
4. Edit any data
5. Click **Next** to move through the modules
6. Click **Submit** when you get to the end; When you've submitted the changes, a confirmation message will be displayed

Deleting a completed audit:

1. Go to the **Campaigns** page
2. Click the **View Audits** link to the right of the campaign containing the audit
3. On the **Campaign Audit Submissions** page, click the **Delete** link to the right of the audit you want to delete
4. You'll get a message asking you to confirm that you want to delete the audit; Click **Delete**

CAMPAIGN AUDIT SUBMISSIONS				
				3
Post date	Store	Name	View	Options
08/07/2016	Cliff's Meat Market	Fred Flintstone	Cobblestone County - Cliff's Meat Market	edit delete



Step #6: Get An Export

MY FORMS				
Audit Title ▲	# Campaigns Using	# Audits	Options	
Kick Butts Bedrock	1	2	Edit Delete Preview Print (PDF) Export	

To get an export on a form:

To download an Excel spreadsheet for a particular audit form—which will display data for all audits completed by Store Audit Center users using that audit form— click the **Export** link to the right of the audit form. This will take you to the **Export Data** page, containing settings for customizing your export. We recommend that most users simply click **Download** without changing any of these settings.

Downloading a report by the form will show you data for all campaigns that used that form. You can sort the data by the campaign to see data collected for any one particular campaign.



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