

# Store Audit Center (SAC) Need-to-Knows

## June 2019

### Coordinator Role

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#### General:

- You are the **coordinator**. Everyone that will be working with/under you are called team members/data collectors in the site. Remember they do not have a login (*only you do*).
- If you would like to **change/reset your password**:
  - If in your account, click on “change password” at the top.
  - If on the login page, click on “request new password.”

#### For Campaigns:

- Under the “**Campaigns**” tab, you will need to create a **new campaign** in order to utilize the new assessment form for 2019! This is a required step!
- When creating a campaign, choose “**no**” for the “**auditors may add stores**” option. No further stores should be added to the site!

ADD A CAMPAIGN

Title \*

Start Date

Month Day Year

Jun 28 2019

Audit Form \*

- Select a value -

Auditors may add stores \*

No 

Yes

Instructions

CREATE CAMPAIGN

- After making a campaign, on the “**Campaigns**” tab, click on your campaign name (*in red*) to be brought to the assignment creation page. On this page,

you will need to make assignments to yourself and/or your team members to assess your stores.

**Important Note:** You will see both new and old stores when making assignments, the campaign grabs all the stores in the site. But, you should ONLY make assignments for the “**new stores**” given to you this year. Do not make assignments for any “old stores” (from previous years) still present in your list or assess these.

**CREATE NEW STORE ASSIGNMENTS**

This will allow you to assign one or more team members to one or more stores for this campaign. Note that it 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/Province Zip

- Any -

**APPLY** **RESET**

Name	Street	City	State/Province	Zip		
DISCOUNT QUICK MART	8334 W APPLETON AVE	Milwaukee	Wisconsin	53218	N	<a href="#">add</a>
FAMILY DOLLAR	6000 W SILVER SPRING DR	Milwaukee	Wisconsin	53218	N	<a href="#">add</a>
FAMILY DOLLAR #24325	7616 W HAMPTON AVE	Milwaukee	Wisconsin	53218	N	<a href="#">add</a>

- Please **follow the 2019 store list you received (over email)** to know which ones to assign and scroll through the list to find these!
- Another way to find these stores is to search within the **search box** by name, street, city, and/or zip code (see *image above*).
- In order to send out email invitations for these assignments, click on the “**invite**” **button (in red)** next to your campaign name. After choosing who to invite, the site will send an alert and a link to complete these assignments to everyone. **Important Note:** Do not edit the “Subject” and “Message” fields on the invite page as this is populated by the site and should not be changed.

HOME / CAMPAIGNS Aa Aa Aa

## CAMPAIGNS

Once you have your Team set up, the Stores you intend to audit selected, and your Audit Form created, you're ready to put the pieces together. This is where you set up and administer your Campaigns. To assign stores to your team members, click the campaign name. Then come back here and click the "Invite" link to send them their "Ready to audit?" invitation emails.

Campaign	Start Date	Audit Form	# Stores	# Audits	Options
Milwaukee Campaign	06/28/2019	Assessment Form 2019	0	0	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Print (PDF)</a>   <a href="#">Invite</a>   <a href="#">Do Audits</a>   <a href="#">View Audits</a>

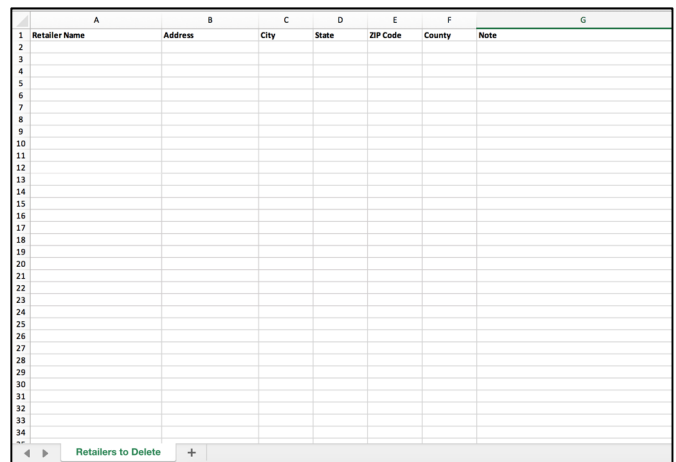
## For Paper Data Collection:

- Remember you will have to enter in data for assessments done on paper into the site later on. In the SAC manual, reference Page 12 for instructions on how to do this. Make sure to account and plan for the time needed in entering this paper data into the site. **Important Note:** You, as the coordinator, will be able to enter this data collected on paper into the site. You can also share your login with your team members/data collectors to do so or make assignments and send the invitation email for them to enter in the paper data (if needed).
- In the assessment form, follow the directions in brackets (next to "no" answers) as this determines which questions should be answered/not. This logic is programmed in online, so it will be important to mimic this, if collecting on paper.

## For Stores:

- Under the **"Stores" tab**, do not add in any "new" stores as stores have already been added and carefully selected for you.
- Do not assess any tobacco shops, hookah lounges or e-cigarette/vape shops. If you see ones off-hand in your store list, you can remove them (*from the "Stores" tab*) by pressing the "delete" button next to them. If you still happen to go to any, only answer Q#1-4 and Q#37 in the assessment form (*choose "no, other reason not listed" for Q#1*) and then leave the store.

- For any stores that need to be removed from your list (*like the store types above*) or random ones that shouldn't be assessed at all (*like bars*), add these changes to the **Retailer Update Form** (*sent over email*) and send this form back to: [jackie@countertools.org](mailto:jackie@countertools.org) by **August 2<sup>nd</sup>, 2019**. Filling out this form will allow these changes to be made and reflected in the master list Counter Tools holds!



	A	B	C	D	E	F	G
1	Retailer Name	Address	City	State	ZIP Code	County	Note
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