USER GUIDE · VERSION 1

Outlet audit

Check an outlet against a checklist, with photos as proof, a score, and follow-up on anything that failed.

1. What it is for
2. How an audit works
3. Start an audit
4. Answer the checklist
5. Check and submit an audit
6. Respond to an audit of your outlet
7. Watch your outlets and plan audits
8. Follow up findings
9. Set up outlets, people and checklists
10. Words it uses

What it is for

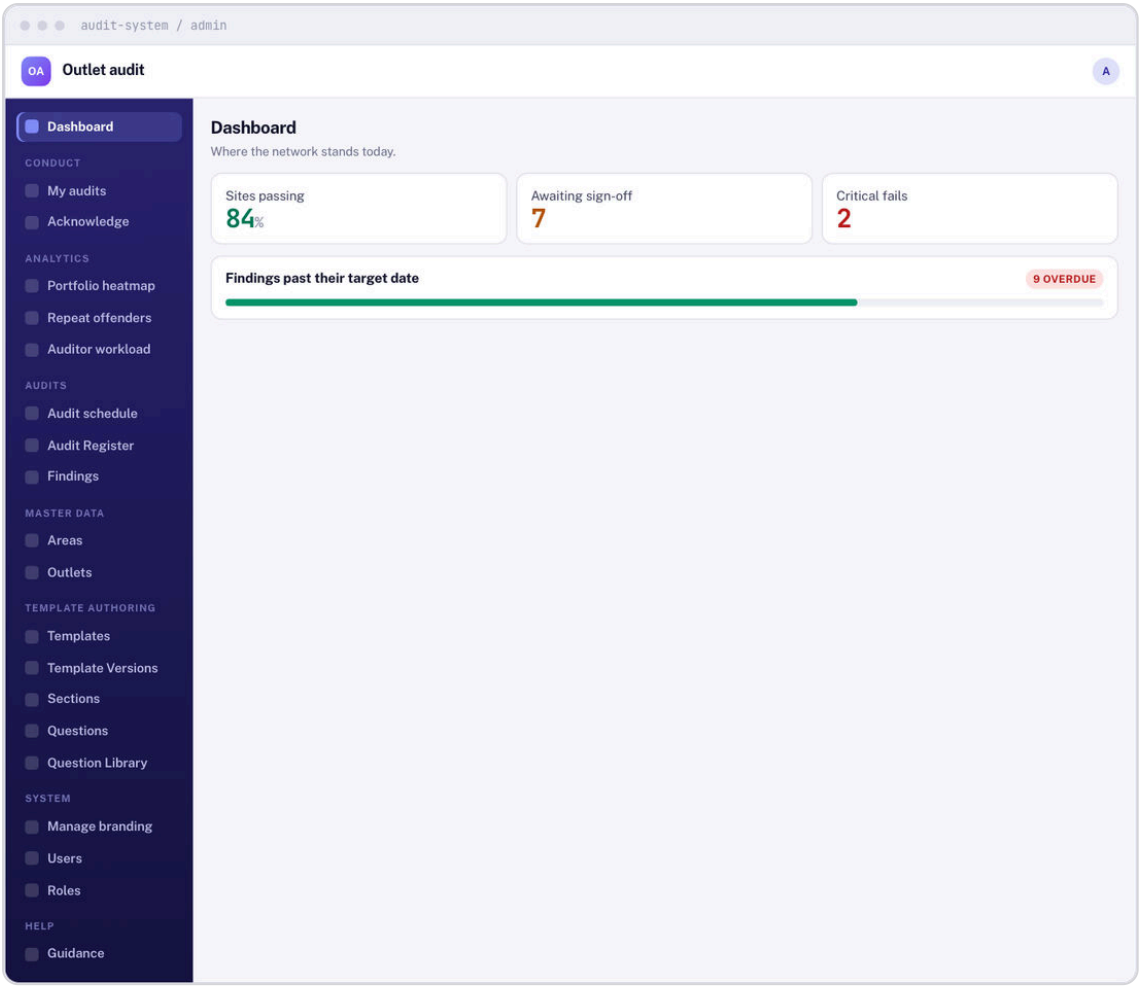
For: Everyone

Outlet audit records whether each outlet follows your company's standard procedures. Someone who does not run the outlet visits it, works through a checklist, and photographs what they find. When they submit, the result is locked, the outlet manager is asked to respond, and every failed question becomes a follow-up job with a deadline.

Who uses it

Role	What they do
Internal Auditor	Visits outlets anywhere in the company, answers the checklist and submits.
Area Manager	Does the same for the outlets in their own areas, plans audit schedules, and settles clashes when the same audit is sent twice.
Outlet Manager	Responds to audits of their own outlet. They see one screen, **Acknowledge**, and this guide.
System Administrator	Sets up areas, outlets, people and checklists, and publishes checklists.

The menu on the left shows only what your role can use. If something in this guide is missing from your menu, your role does not include it.



What it needs from other modules

- You sign in through the Portal. Your name and phone number come from there and cannot be changed here.
- Outlets, and who manages which outlet, come from your company's staff and outlet records in the Portal.
- An audit request raised in **Customer service** appears here as a one-off audit schedule.

OUTLET AUDIT

How an audit works

For: Everyone

An audit goes through six steps. People do steps 1, 2, 3 and 5. The system does the rest.

1. **Start.** The auditor picks the outlet and the checklist.
2. **Answer.** The auditor answers every question **Pass**, **Fail** or **N/A** and takes the photos each question asks for.
3. **Submit.** The auditor checks the result and submits. The audit is now locked.
4. **Report.** Every failed question becomes a finding (a follow-up job with a deadline). The report goes to the outlet, the area and the auditor.
5. **Respond.** The outlet manager acknowledges, disputes or declines the result within 72 hours.
6. **Fix.** Each finding has a deadline. Late findings are passed up the management chain.

Rules no one can switch off

- **Nobody audits their own outlet.** The outlet you manage is not offered when you start an audit, and an Outlet Manager cannot start audits at all.
- **There is no way to type an audit in afterwards.** An audit only exists if someone starts it and answers it.
- **No result without its photos.** An audit cannot be submitted until every required photo has uploaded and been checked.
- **Submitting locks the audit for good.** Nobody can edit or delete it. A correction is a new audit that points back to the old one.
- **One failed critical question fails the whole audit**, whatever the percentage. A result can read "FAIL, computed 87%", and that is correct.
- **Each question is all or nothing. Pass** earns its full points, **Fail** earns none.
- **N/A does not count as a pass.** The question is left out of the score. **Fail** and **N/A** both need a comment.
- **Each checklist sets its own grade lines.** Old audits keep the grade lines of the checklist they used.
- **72 hours to respond.** After that the audit goes to the Area Manager, marked as not acknowledged. The score still stands.

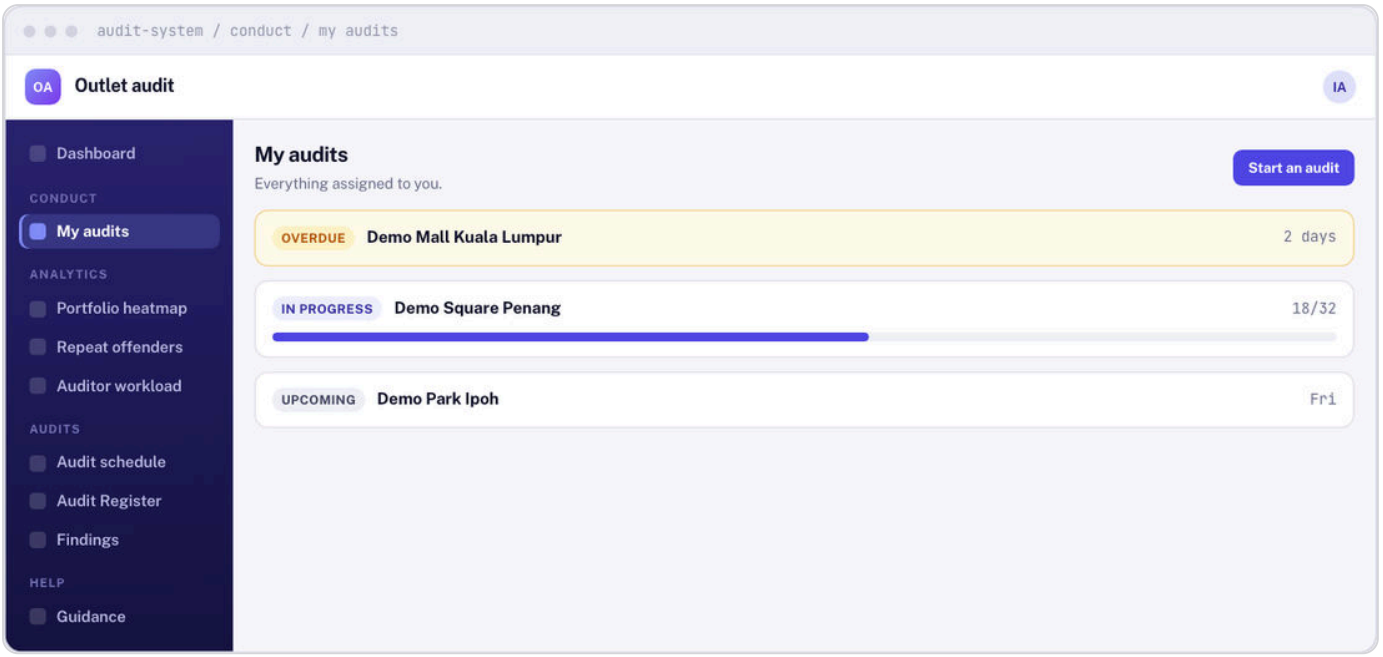
- **Findings have deadlines by severity:** 3 days for high, 14 days for medium, 30 days for low. A late finding moves up the chain: Outlet Manager, then Area Manager, then Maintenance head of department, then Head of Operations.

OUTLET AUDIT

Start an audit

For: Internal Auditors and Area Managers

1. Open **My audits** in the menu on the left, under **Conduct**.
2. Your audits are listed by what needs doing first: due today, overdue, in progress and upcoming. An audit you started and did not finish waits here with its answers saved. Press it to carry on.
3. To start a new one, press **Start an audit** at the top right.
4. Pick the **Outlet**. Only outlets you are allowed to audit are listed, and never the one you manage.
5. Pick the **Standard** (the checklist). Only published checklists are listed.
6. Press **Open the audit**.



The outlet name and the checklist version are saved onto the audit when you start it. Publishing a newer checklist later does not change an audit you already started.

You need a connection the whole time

Every answer and photo is saved to the server as you go. Nothing is kept on your phone. If the connection drops, what you already saved is safe, but wait until it comes back before you carry on.

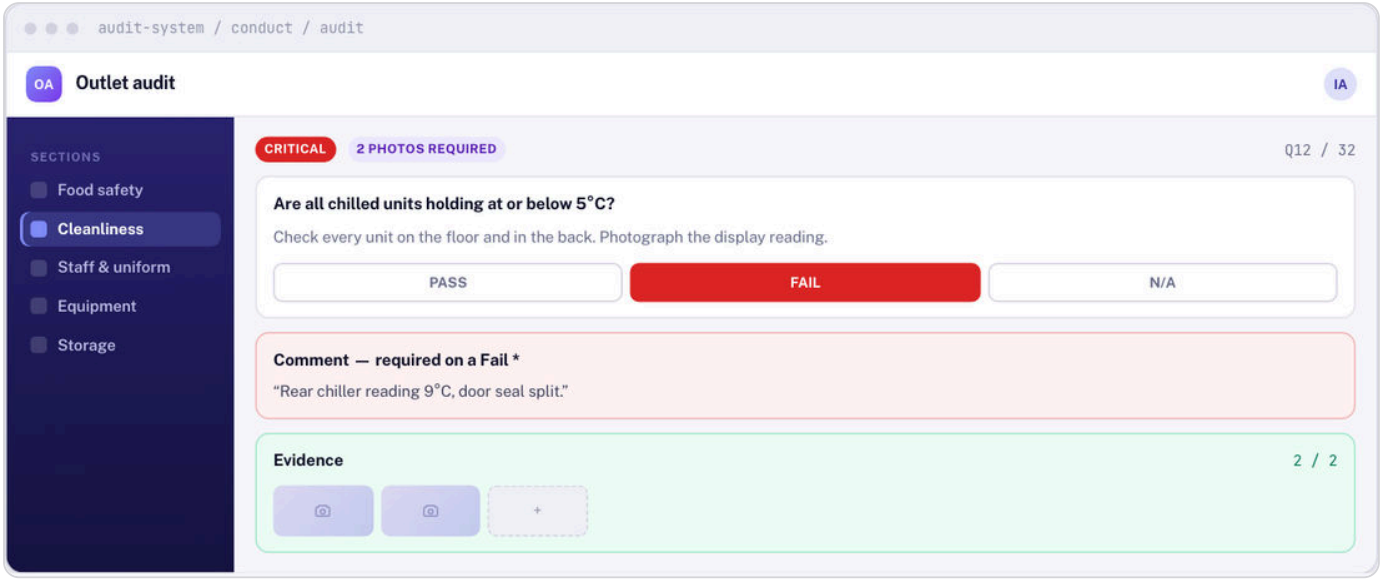
OUTLET AUDIT

Answer the checklist

For: Internal Auditors and Area Managers

The checklist is split into sections, listed on the left with how many questions each holds. The top of the screen shows how many questions are done and the running score.

1. Press a section, then press a question.
2. Choose **Pass**, **Fail** or **N/A**.
    - **N/A** means the question does not apply to this outlet. It is left out of the score.
3. If you chose **Fail** or **N/A**, write a comment saying why. The box is marked required. For a **Pass**, the **Note (optional)** box is there if you want it.
4. Add the photos the question asks for. A question shows how many photos it needs, whatever the answer.
5. Press **Next item** to move on, or **Previous** to go back.



You can leave a question and come back. It stays incomplete until it has an answer, its comment if one is needed, and its photos.

Critical questions

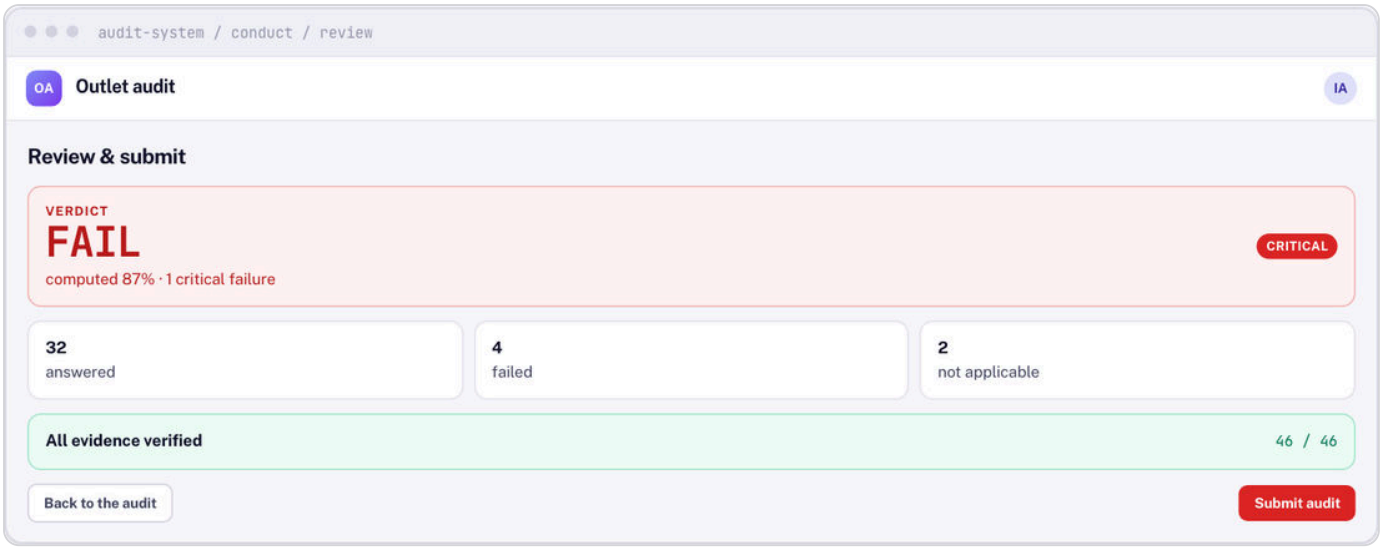
A question marked **CRITICAL** is one that could close a shop or hurt someone. If it fails, the whole audit fails, whatever the percentage.

OUTLET AUDIT

Check and submit an audit

For: Internal Auditors and Area Managers

1. When every question is done, press **Review & submit** under the list of sections.
2. Check the result: the verdict, the score for each section, and the photo count.
3. To change an answer, press **Back to the audit**.
4. When you are sure, press **Submit audit**.



Submitting locks the audit. Nobody can change it afterwards, including you.

If the screen says items are left, the audit cannot be submitted yet. A question counts as unfinished while its photos are missing, even if it has an answer.

After you submit

You do not need to do anything else. Findings are raised, the report is sent, and the outlet manager is asked to respond. You cannot respond to your own audit.

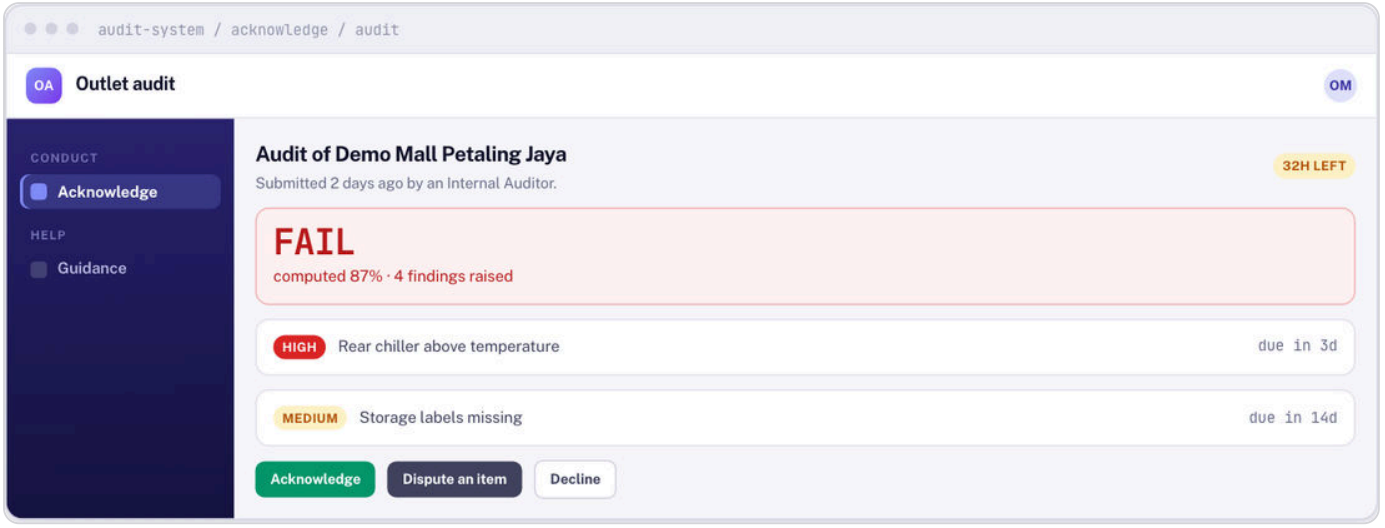
OUTLET AUDIT

Respond to an audit of your outlet

For: Outlet Managers

When your outlet is audited, you have 72 hours to respond. You may also get the report by email or WhatsApp, if your company has switched those on.

1. Open **Acknowledge** in the menu on the left. It lists audits of your outlet that are waiting for you.
2. Open the audit. You see the verdict, the score, every failed question, the auditor's comments and photos, and the deadline for each finding.
3. Choose one answer:
    - **Acknowledge**: you have read it and accept it.
    - **Dispute an item**: you accept it except for some items. Pick the items under **Items you dispute** and write **Why**. Your dispute is saved on the audit, where your Area Manager can see it. There is no separate review step on screen yet.
    - **Decline**: you do not accept it. Write a **Reason**.



There is nothing to sign. Your sign-in is your signature. You cannot change your answer afterwards; if your position changes, talk to your Area Manager.

What your answer changes

None of the three answers changes the score, the findings or the report. If something is wrong, use **Dispute an item** and say what and why. Do not leave it unanswered.

If you do not respond in 72 hours, the audit goes to your Area Manager, marked as not acknowledged. The result and findings still stand.

OUTLET AUDIT

Watch your outlets and plan audits

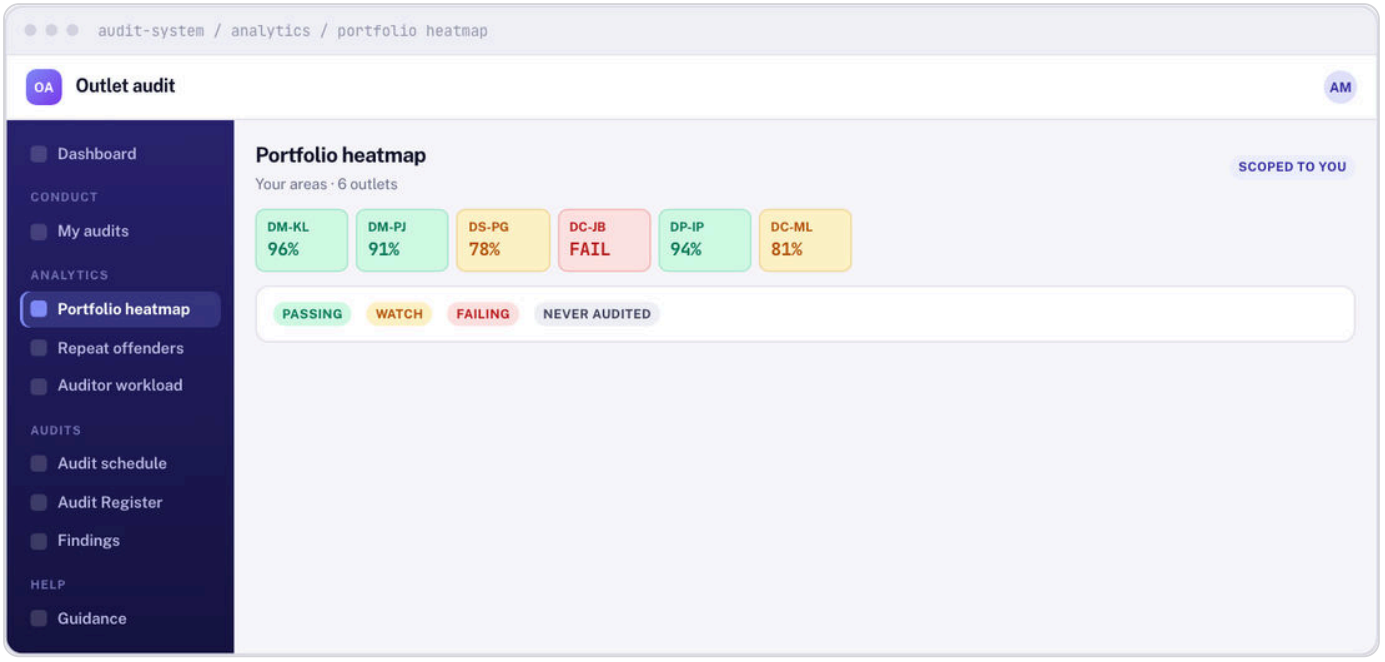
For: Area Managers

You do everything an Internal Auditor does, for the outlets in your own areas. Your screens show only those outlets. If your screens are empty, nobody has linked you to your outlets yet. Ask a System Administrator.

See where to look

Under **Analytics** in the menu on the left:

- **Portfolio heatmap**: every outlet coloured by its latest result. Green is passing, amber is passing but close to the line, red is failing, and grey with a dash means never audited. Press an outlet to open its scorecard.
- **Repeat offenders**: what keeps failing, not what failed once.
- **Auditor workload**: who is carrying how many audits.



A red **FAIL** can sit over a high percentage. That means a critical question failed.

Plan audits

1. Open **Audit schedule** under **Audits**.
2. Press **New audit schedule**.
3. Choose the **Scope**: **A single outlet** or **An area (every outlet in it)**. Then pick the outlet or area and the **Standard**.

4. Choose the **Frequency**, the **Next due** date, and who it is **Conducted by**. Leave **Named auditor** empty to let the first free person take it.
5. Add a **Reason** if the auditor should know why, then press **Create**.

Requests raised in Customer service appear in the same list, with the customer's complaint as the reason.

Settle an audit sent twice

If two devices submit the same audit, the first one counts. The second is kept, not lost, and shows **CONFLICT** in **Audit Register**. Open it, press **Resolve conflict**, and decide what happens to the second copy.

You cannot swap the two, so the second copy becomes the one that counts. Only a System Administrator can do that.

Audits nobody answered

If an Outlet Manager does not respond within 72 hours, the audit comes to you, marked as not acknowledged. The score and findings still stand. Only the outlet's response is missing.

Follow up findings

For: Area Managers and System Administrators

A finding is a failed question turned into a job, with a severity, an owner and a deadline. Findings are raised by the system when an audit is submitted. Nobody has to file them.

1. Open **Findings** under **Audits** in the menu on the left.
2. Each row shows the outlet, the severity, what was found, how old it is and who it is sitting with.
3. Open a finding to see the photos and comments from the audit.

Deadlines

Severity	Deadline	Moves up the chain every
High	3 days	1 day once late
Medium	14 days	7 days once late
Low	30 days	14 days once late

A late finding moves from the Outlet Manager to the Area Manager, then the Maintenance head of department, then the Head of Operations.

Where repairs are tracked

Repairs are meant to be logged and closed in your company's repair-tracking system, not here. **That link does not work yet.** Each finding gets a reference number, but no repair job is opened anywhere. Agree with your team how repairs are tracked until it is connected.

Record that a fix was checked

A System Administrator can open a finding and press **Record a verification** to note that someone went back, what they saw, and their conclusion. This does not close the repair job. A finding can only be verified once. A later visit needs a new audit.

Set up outlets, people and checklists

For: Administrators

Do these in order. Each step needs the one before it.

1. Areas and outlets

Open **Areas**, then **Outlets**, under **Master data**. An outlet belongs to an area. Outlets normally arrive from your company's records in the Portal. Use **New area** or **New outlet** only for something the Portal does not have.

2. People

Open **Users** under **System**. Each person's name and phone come from the Portal sign-in and cannot be changed here. Here you set:

- their role, with **Edit**
- extra outlets they may work on, with **Assign outlets**

Who manages which outlet normally comes from the Portal. Until a person is linked to their outlets, an Area Manager or Outlet Manager sees empty screens and will think the system is broken. If someone says "there is nothing here", check this first.

3. Checklists

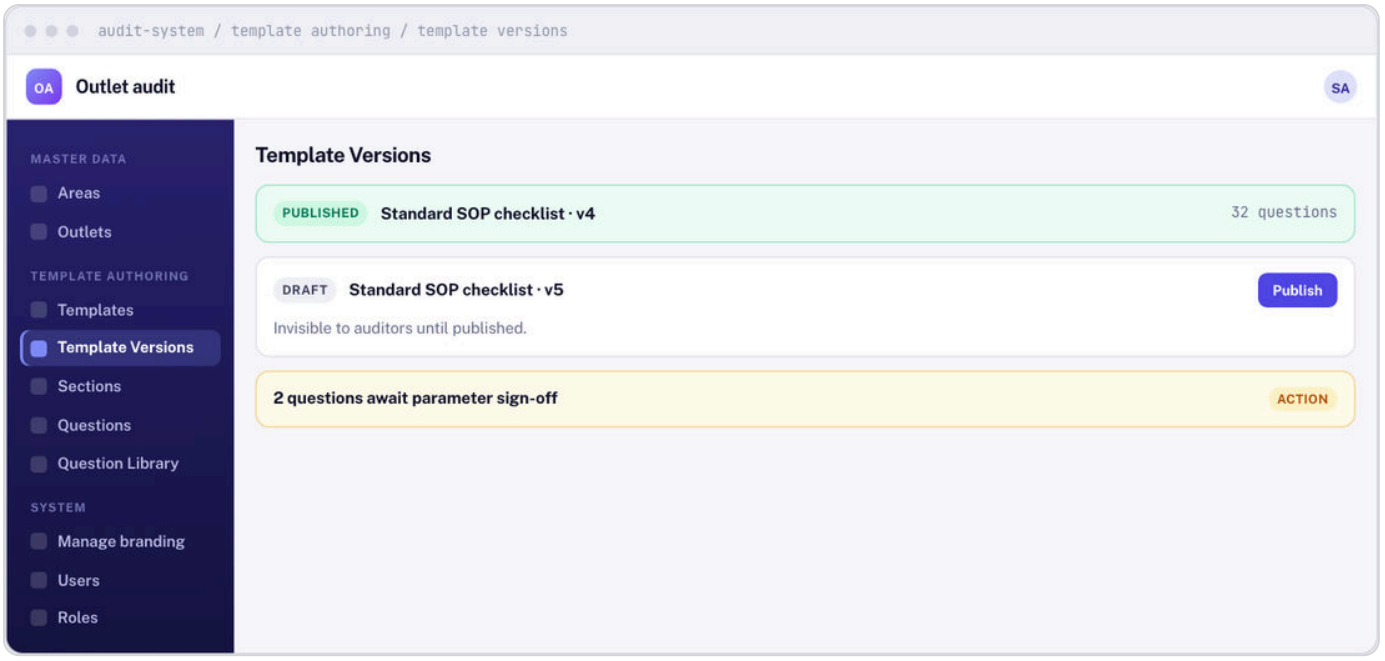
Under **Template authoring**:

- **Templates**: the checklist itself, for example "Standard SOP checklist".
- **Template Versions**: dated editions of a checklist.
- **Sections**: groups of questions inside a version.
- **Questions**: the questions themselves, with how many photos each needs and whether it is critical.
- **Question Library**: shared questions you can reuse, so the same check is worded the same way everywhere.

Mark a question critical only if failing it should fail the whole audit.

4. Publish

Auditors cannot see a draft. Open the draft in **Template Versions** and press **Publish**. From then on it is offered in **Start an audit**. Audits already submitted keep the version they used.



Some questions carry legal or safety limits, such as a fridge temperature. These need you to press **Confirm parameter** before they are treated as confirmed.

To stop using an old checklist, set **Retired on** on its template. It disappears from **Start an audit** and from new schedules. Finished audits keep it.

Running it day to day

- **Manage branding** under **System** sets the name and logo shown on screens, the sign-in page, and the reports.
- **Roles** under **System** sets what each role may do.
- If an audit sent twice was settled the wrong way round, open it from **Audit Register** and choose **Void this record, promote the rejected copy**. Only you can do this. It creates a new record and erases nothing.

Words it uses

For: Everyone

Word	Meaning
Audit	One visit to one outlet, against one published checklist.
Template, version	The checklist, and a dated edition of it. An audit keeps the version it used.
Critical question	A question that fails the whole audit if it fails.
N/A	The question does not apply to this outlet. It is left out of the score and needs a comment.
Evidence	The photos attached to a question. Each one is fingerprinted when it uploads, so it cannot be swapped later.
Syncing	Submitted, but still waiting for photos to finish checking. No report goes out until it clears.
Finding	A failed question turned into a job, with a severity, an owner and a deadline.
Severity	High, medium or low. It sets the deadline.
Acknowledge, dispute, decline	The three ways an outlet manager can respond to an audit.
Conflict	The same audit submitted twice. The first one counts. The second waits for an Area Manager.
Void	Marking a locked audit as not counting. It leaves every score but stays in **Audit Register** with the reason.
Retired	A checklist taken out of use. Past audits keep it.