

Digital Store Audit

Flow Solution from Salesforce Labs

Version 1.0 - September 2019

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Why should you use Digital Store Audit?

Digital Store Audit provides store, territory, and quality assurance managers with a comprehensive tool for conducting retail store audits using Salesforce.

As a mobile-first platform with robust process automation tools, Salesforce can be an integral part of a retail Store Operations strategy. Retail managers often perform multiple store audit walkthroughs a day, generating substantial amounts of paper-based, unused data. Instead - let's collect this in a structured way in Salesforce, so we can provide real-time insight with standard Reports & Dashboards, expand business process automation, and all the other features you've come to love about working on the Salesforce Platform.

Sounds awesome, right? Let's get started!

 **Note:** This package includes a sample Digital Store Audit designed for a Grocery Store.

This example is to help illustrate the power of the Flow Template, and can be adapted or ignored and re-created as appropriate for your use case. The [Configuration Guide](#) will guide you through creating your own audit from scratch.

Installation Guide

Please Note

- You must be on Enterprise Edition or higher to provide access to use of [Flow Builder](#).
- This Flow includes custom Lightning Components, so it is only going to work in Lightning Experience. [“My Domain” must be enabled](#) for the Lightning Components to be visible.
- These instructions assume you’re a System Admin with the permissions necessary to perform the instructions outlined below. If you’re not, provide this guide to a System Admin at your company and ask for their help!

Installation Instructions

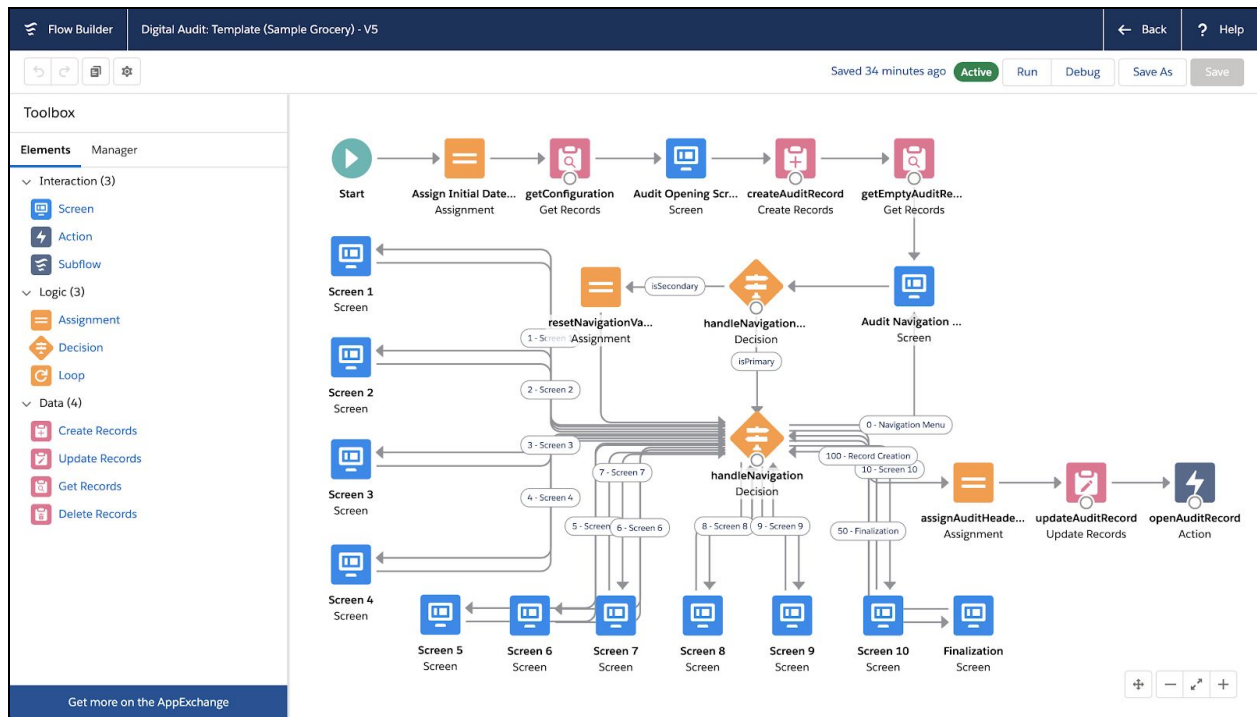
1. Go to the AppExchange listing for Digital Store Audit and click **Get it now!**

⚠ We strongly encourage the best practice of installing and testing apps like this one in your Sandbox environment prior to use in your Production environment

2. Select **Install for All Users** and wait patiently for the package to install in your org. Go grab a coffee, but come back soon - it shouldn’t take too long.
3. Go to **Set Up → Process Automation → Flows** and ensure that the flow called “Digital Audit: Template” is ACTIVE ✓

View from behind the scenes: Flow Builder

Below is a screenshot for your reference of what the Flow for the *Digital Audit Template* looks like:



If you're just getting started learning about Flow Builder, check out the [Trailhead Module: Flow Builder](#).

Configuration Guide

1. Included in the Installed Package

This in installed package, metadata is set up in your org to support the Flow Template:

Audit Configuration (Custom Object)

This custom object is used to define the many types of Audits your may do. It stores all the naming, instructions, and expectations that show up through the Digital Audit screens.

User - Store (Field)

This custom field on the User object allows an administrator to predefine a user's store location for use in the Flow Template. If left blank, a user will have to choose the store location in the Flow.

Grocery Store Review (Example) (Custom Object)

This custom object is used to store the Digital Store Audit data for the sample included in the package. If you wish to discard, this custom object, you can without impacting the overall Flow Template. You will need to create a similar custom object to store the Digital Store Audit data you would like to collect, and ensure the Flow Template references the right custom object and fields.

Store Operations (Lightning App)

This lightning application helps to organize your Digital Store Audits within the User Experience. Similar to the out-of-the-box Sales and Service apps, you can control users' access to business processes by enabling their access to apps.

Manager Store Review (Lightning App Page)

This lightning app page contains the sample Flow Template and a List View of the Grocery Store Review object. This is an example to give you ideas of how you might want to present your Digital Store Audit to your users.

2. Setting up System Data

To help with this Flow Template, the installed package includes some system data to simplify the user experience. This system data is still under your control and easy to modify.

Global Picklist Value Sets

A global picklist value set for **Stores** allows you to centrally maintain the values for stores as used throughout your Salesforce instance. This consistency ensures field validity and helps to reduce errors when creating records. This Flow Template references the Stores value set for both screen components and record creation.

The screenshot shows the 'Global Value Set' configuration page in Salesforce. The page title is 'Global Value Set' with a 'Back to List' link. Below the title, there are tabs for 'Values (3)', 'Inactive Values (0)', and 'Fields Where Used (3)'. The 'Global Value Set Detail' section includes 'Edit' and 'Delete' buttons. The 'Information' section shows fields for 'Label', 'Name', and 'Description', all with the value 'Stores'. Below this, there are 'Edit' and 'Delete' buttons. The 'Values' section has a table with columns: Action, Values, API Name, Default, Chart Colors, and Modified By. The table contains three rows of data. Below the table, there are sections for 'Inactive Values' (showing 'No Inactive Values values defined.') and 'Fields Where Used'.

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	The Friendly Grocer	The Friendly Grocer	☐	Assigned dynamically	Astro Nomical , 05/09/2019 1:09 AM
Edit Del Deactivate	Corner Street Market	Corner Street Market	☐	Assigned dynamically	Astro Nomical , 05/09/2019 1:09 AM
Edit Del Deactivate	Bulk Around Town	Bulk Around Town	☐	Assigned dynamically	Astro Nomical , 05/09/2019 1:09 AM

Edit the picklist values to match your organization's needs.

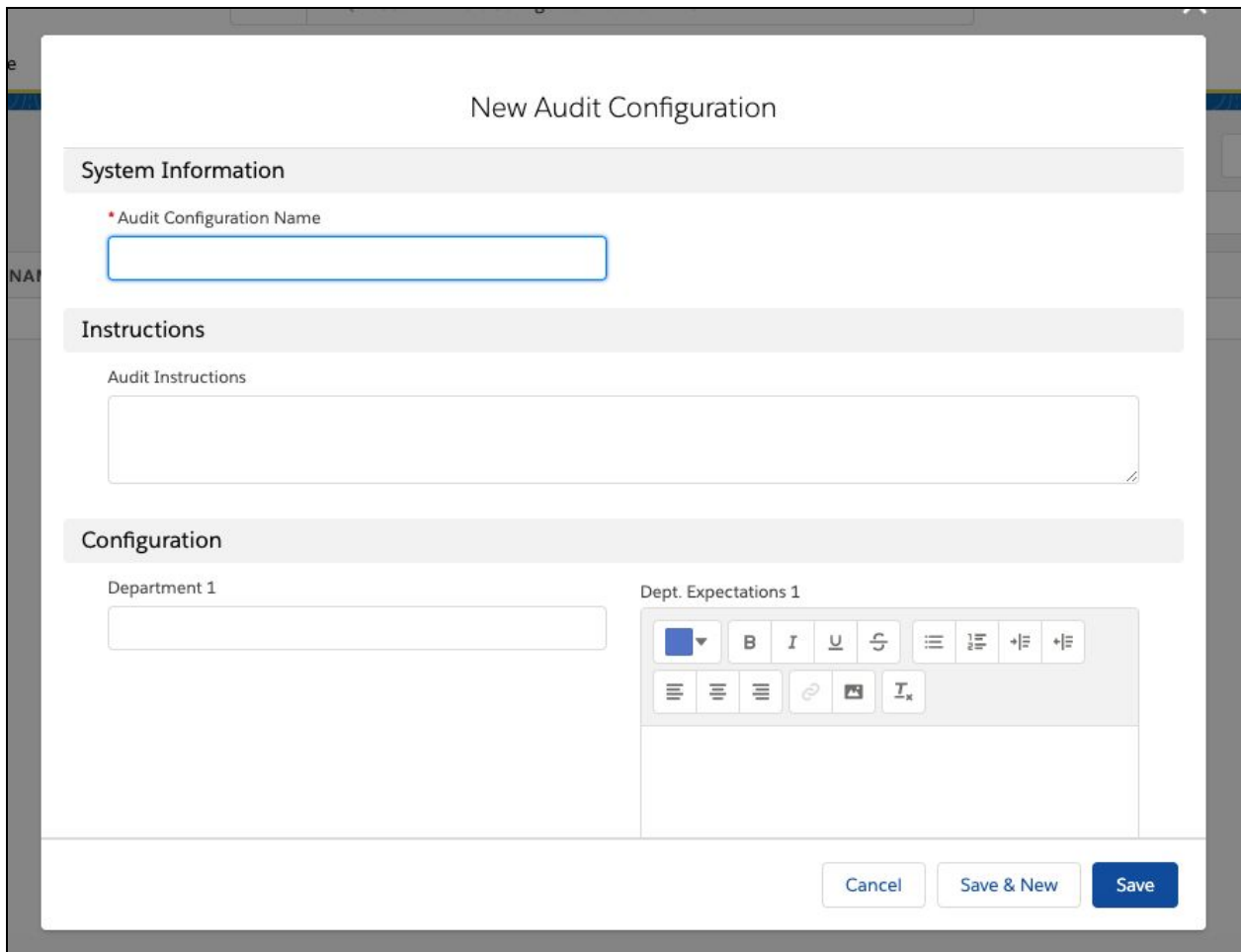
This picklist value set is referenced in the following places:

- User record
- Audit Configuration
- Grocery Store Review (Example)

Creating an Audit Configuration

Building your own Digital Audit starts with defining the configuration record. Treating a configuration as a record vs metadata enables you to have many Audits running simultaneously in your instance.

1. Navigate to the Audit Configuration tab within the Store Operations app, or through the App Launcher
2. Create a new Audit Configuration



The screenshot shows a web form titled "New Audit Configuration". The form is divided into three main sections: "System Information", "Instructions", and "Configuration".

- System Information:** Contains a required text input field labeled "Audit Configuration Name".
- Instructions:** Contains a large text area labeled "Audit Instructions".
- Configuration:** Contains two sub-sections:
 - Department 1:** A text input field.
 - Dept. Expectations 1:** A rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, bulleted list, numbered list, indent, and outdent. Below the toolbar is a large text area for expectations.

At the bottom right of the form are three buttons: "Cancel", "Save & New", and "Save".

3. The Audit Configuration Name describes the Header title of the Digital Audit that shows up when a user launches the flow. The Audit Instructions show on the Navigation Menu to instruct the user on key information.
4. Departments 1-20 allow you to define the name of a department or section within your Digital Audit, and the expectations that show up within the Flow. This can be

used to show best practices, areas to watch for, etc. The expectations fields is Rich Text, allowing you to format your text and include images.

As a best practice, define your departments in the most logical order your user will work through, or in logical groupings you will use later. Thinking about this ahead of time will simplify the configuration of your Flow Template. Because this is a template, you can add more departments if you need more!

📌 The flow can expand up to 50 departments if need be.

Upon creating your Audit Configuration, you are presented with the **Record Id** in the page layout. You will use this when adding your Flow to a lightning app page to identify which audit to launch.

Related	Details
Audit Configuration Name	Record Id
Grocery Store Review	a003i000002pC3y
▼ Instructions	
Audit Instructions	
The following steps complete your store walkthrough today.	
▼ Configuration	

You have just created the inputs into your Flow Template!

Defining your Digital Audit Report

Now that you have the inputs to your Flow Template, you need a place to store the wonderful data your users will create.

The package you've installed includes an example called "Grocery Store Review", but you can - *and should* - create one that matches your business.

1. Create a custom object for your Report, and provide the default name field as an Autonumber with the format of your choosing. This is important as you don't define a report name in the Flow Template. If you want to adjust that though, you can make those changes in the Flow Template later.
2. Your report can have data fields collected by the user during the flow (Text, Numbers/Currency/Percentages, Checkboxes). You should also have a picklist field with the values of your **Store** global value set.

Information (Header visible on edit only)			
Owner	Sample Text	Store	Sample Text
 Date	07/09/2019	 Duration of Audit(mins)	729.72
Store Sales Yesterday	\$123.45	Rolling Sales Per Hour	\$123.45
Projected Day Sales	\$123.45	+/- Week To Date	86,966%
Store Faced	☒	Freight Finished	☒

3. Your report will also need a place to store the outputs from your department reviews, specifically the Rating and Comments collected.

Departments			
Outside Rating	66,056	Outside Comments	Sample Text
Front Entrance Rating	97,105	Front Entrance Comments	Sample Text
Front End Rating	27,961	Front End Comments	Sample Text
	Blank Space		Blank Space
Pallet Displays Rating	37,560	Pallet Displays Comments	Sample Text
End Displays Rating	7,256	End Displays Comments	Sample Text
Side Panels Rating	78,457	Side Panels Comments	Sample Text
	Blank Space		Blank Space
Produce Rating	39,861	Produce Comments	Sample Text

4. Finally, you may want to consider some calculated values to give context to your Digital Audit. This could include Start Time, End Time, the Average Rating of the Audit, and the total Duration of the Audit. These fields are included on the Grocery Store Review example if you require a reference.

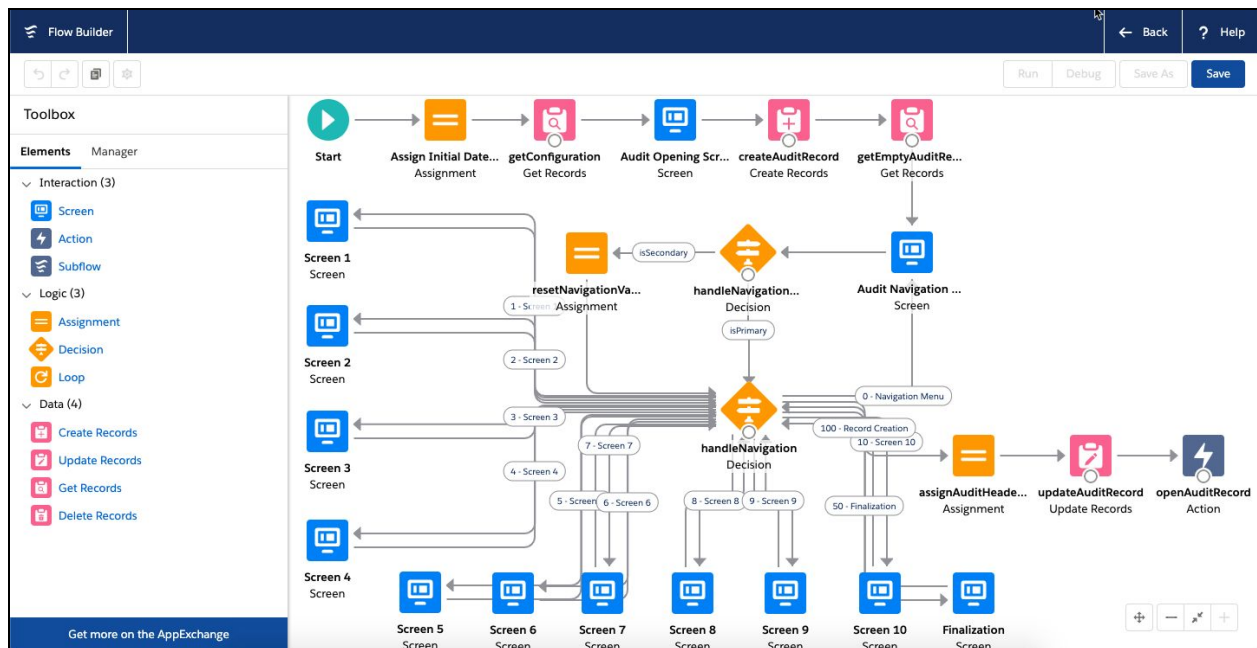
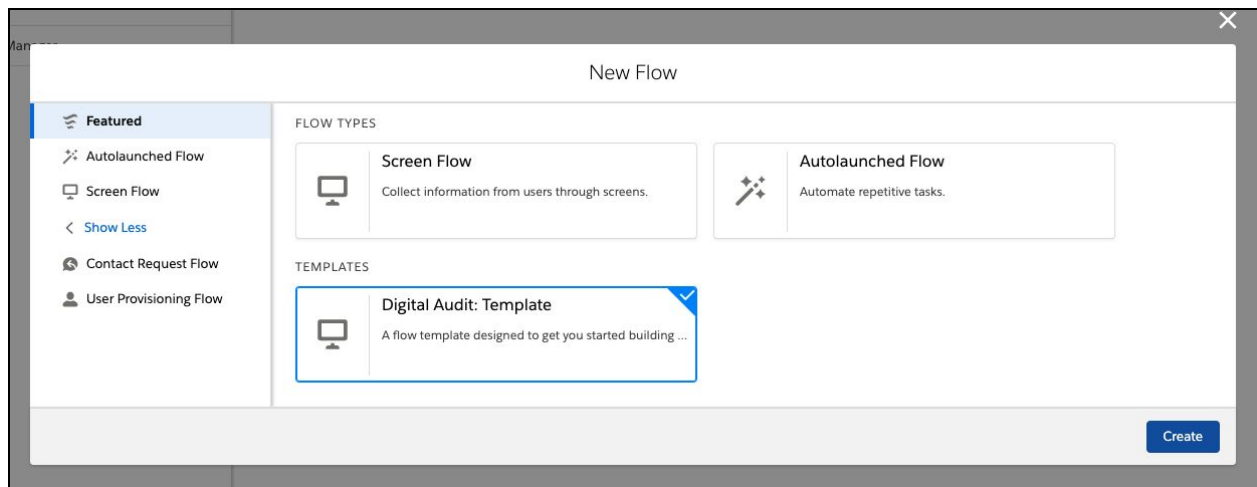
Duration			
 Average Audit Rating	210.66	 Duration of Audit (mins)	889.82
Start Time	07/09/2019 9:46 PM	End Time	07/09/2019 9:46 PM

Once you have your new custom object created for your Digital Audit report, you are ready to add it to the Flow Template!

3. Creating your Flow Template

Let's start building your new Digital Audit flow off the Flow Template.

1. In the Setup Menu, search the Quick Find for Flows and open the navigation item. This page provides all the details on your Installed and Active flows.
2. Click on the New Flow button and select the **Digital Audit: Template** menu item. This will spin up a full version of the Flow Template that you can modify to your new Audit Configuration and report.

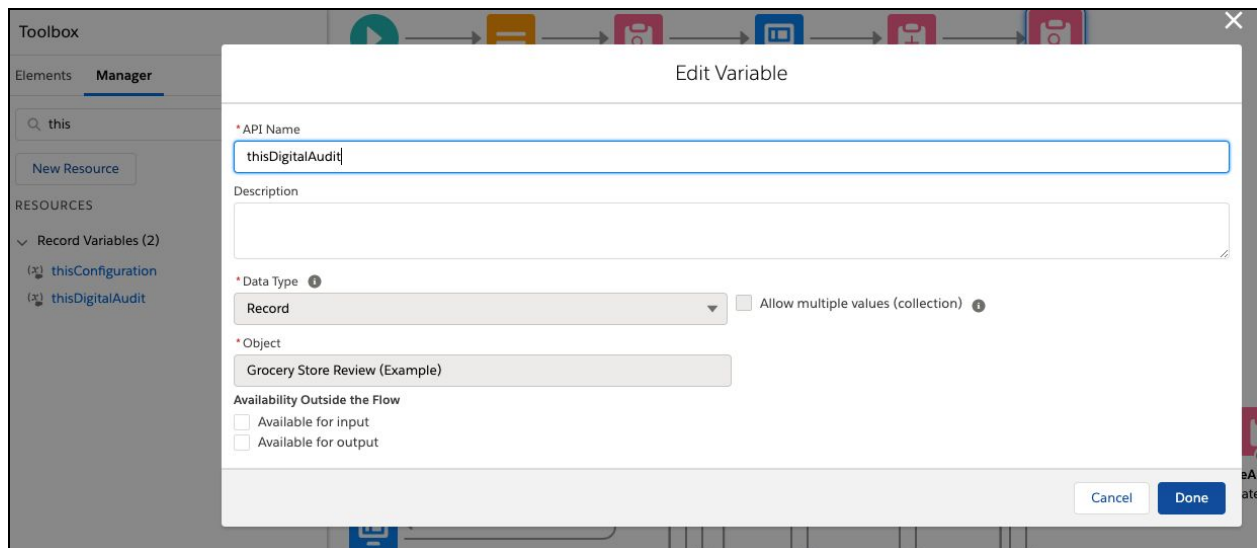


3. You will be introduced to your new flow, ready for you to work with. Now you might think this looks complicated. It is. However, by using the template you don't need to rebuild the complexity, it's ready here for you.

Before you start configuring, hit Save in the top right corner and give your flow a name. You can always come back and perfect it, but you don't want to lose your changes as you go. Save liberally as you go through this, such as after every step you do.

Let's start by configuring the resources your flow will use.

4. Under your Toolbox, click on Manager, and search for the term **this**. You will see two Record Variables returned: *thisConfiguration* and *thisDigitalAudit*. These represent your input and output records you created before. Open up **thisDigitalAudit**



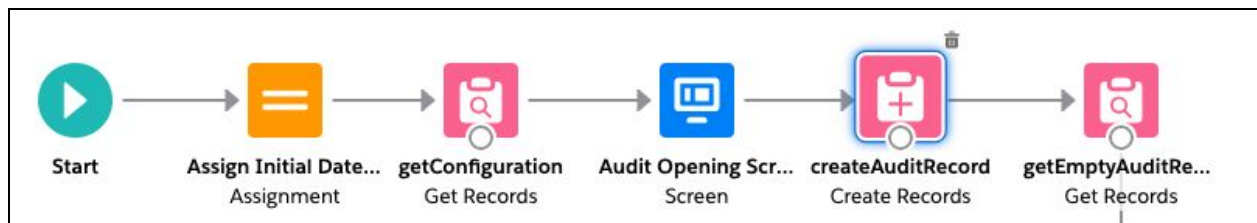
5. Because this variable is already assigned to our sample report you will need to create a new variable to represent your new custom object. Click Done, and in the Toolbox, click on **New Resource**.

6. Select the Resource Type **Variable** and Data Type **Record**. As a best practice, name your variable **myDigitalAudit**. Click Done to create your variable.

The screenshot shows a configuration window for a new variable. It includes the following fields and options:

- * Resource Type:** A dropdown menu with "Variable" selected.
- * API Name:** A text input field containing "myDigitalAudit".
- Description:** An empty text area.
- * Data Type:** A dropdown menu with "Record" selected. To its right is a checkbox labeled "Allow multiple values (collection)" which is currently unchecked.
- * Object:** A search input field with the placeholder text "Search objects..." and a magnifying glass icon.
- Availability Outside the Flow:** Two unchecked checkboxes: "Available for input" and "Available for output".
- Buttons:** "Cancel" and "Done" buttons at the bottom right.

7. You now have a record variable to store all of your users inputs. You will continue to use this as you configure your Digital Audit Flow. Let's now create a shell of your report, so you have somewhere to store the data. On the Flow Canvas, double-click on the pink create item called **createAuditRecord**.



8. Replace the record variable *thisDigitalAudit* with your newly created variable **myDigitalAudit**. Click Done to update this creation step.

Edit Create Records

Create Salesforce records using values from the flow.

* Label: createAuditRecord

* API Name: createAuditRecord

Description

How Many Records to Create

☒ One

☐ Multiple

How to Set the Record Fields

☒ Use all values from a record variable

☐ Use separate variables, resources, and literal values

Select Variable

* Record Variable: my

RECORD VARIABLES

- myDigitalAudit
- Grocery_Store_Review__c

Cancel Done

9. Double-click on the next step in the flow, the pink get item called **getEmptyAuditRecord**. This step seems odd. Why are you getting an empty record? Well, flows require us to get the fields you want to capture ahead of time or it doesn't know where to put data. So in this get step, you will define all the fields your users will provide you for your report.

Update the Object from the sample (Grocery Store Review) object to your newly created report custom object. You will also replace the filter criteria from *thisDigitalAudit.Id* to **myDigitalAudit.Id**. This allows us to find the right report based on the Id. Remember, your users could be doing hundreds of audits, so the Id is how you make sure everything matches. Finally you will need to update where to store your empty record from *thisDigitalAudit* to **myDigitalAudit**. Don't click done just yet.

×

Edit Get Records

getEmptyAuditRecordgetEmptyAuditRecord

Description

Get Records of This Object

* Object

Grocery Store Review (Example)

Filter Grocery Store Review (Example) Records

Condition Requirements

Conditions are Met

FieldOperatorValue

IdEquals{!myDigitalAudit.Id}

+ Add Condition

Sort Grocery Store Review (Example) Records

Sort Order

CancelDone

Screen 4

Select Variable to Store Grocery Store Review (Example)

* Record Variable

my

RECORD VARIABLES

myDigitalAuditGrocery_Store_Review__c

10. Add all of the fields that you will ask your users to provide during the Digital Audit. If you aren't sure if you will use them, it doesn't hurt to add them anyways.

Select Grocery Store Review (Example) Fields to Store in Variable

Field

ID

Field

Bakery_Rating__c

Field

Bakery_Comments__c

Field

Search fields...

+ Add Field

Cancel Done

11. Before you adapt your flow more, let's first think about how you are going to structure your Audit for your users. The Flow Template includes 12 screens for navigation and data collection. However to make things easy for your users to enter data, you can collect a lot of data about many departments on each screen. You do this with prebuilt lightning components for Data Collection and Audit Collection

Data Collection Lightning Component (DA_DataCollection)

This lightning component lets us collect text, number/currency/percentage, and checkbox data in a single screen. It includes inputs for up to:

- 6 number/currency/percentage fields
- 4 text fields
- 4 boolean (checkbox) fields

If you don't have that many on your report, don't worry. The fields only show up if you define them, so there won't be extra information on the screens for your users.

Audit Collection Lightning Component (DA_AuditCollection)

This lightning component let's us collect the department ratings and comments that you defined in your report. Each component includes inputs for up to:

- 5 department names (from Audit Configuration)
- 5 department expectations (from Audit Configuration)
- 5 department ratings
- 5 department comments

If you don't want to include 5 departments on a screen, no problem. Tabs will only appear if you have included a department name.

Audit Navigation Menu (DA_NavigationMenu)

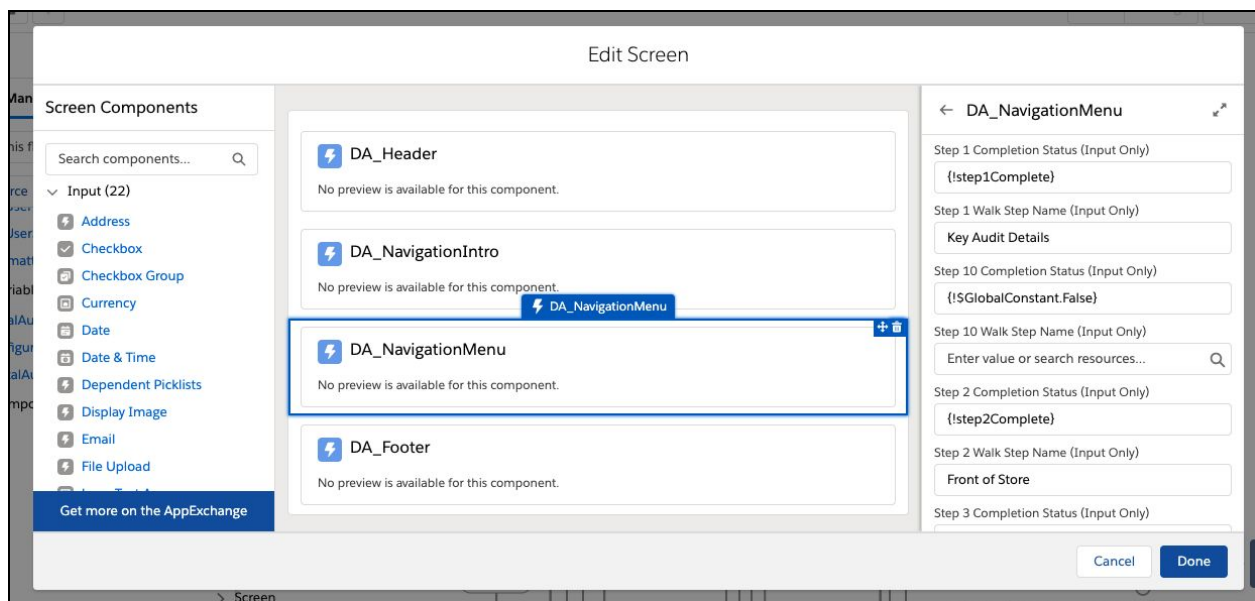
This lightning component is designed to allow users to easily navigate between screens to access different departments. It's very likely that, despite the best planning of route your users will take, they may go to departments in a different order than you designed in your flow. The navigation menu removes the linear path that you don't want to exist. The navigation component allows us to navigate to up to:

- 10 screens
- 1 finishing screen

If you don't want to use all 10 screens, your call. Navigation menu items will only show up if you give them a name in the flow configuration. If you have 6 data fields and 15 departments, you may want to have 1 screen to collect the data, and 5 screens to collect 3 departments each. You would only need to name 7 screens and leave the remaining 3 blank.

12. Now that you have an idea of how many screens you may navigate to, double-click on the blue screen item called **Audit Navigation Menu**. You will see the screen has 4 components. The Header, Navigation Intro, and Footer are already defined, and do not need to be adapted. Click on the third component **DA_NavigationMenu**. On the right hand side you will see a long list of fields you can define for this component. Most are already set up for you, but you will need to modify a few for your new flow.

Look down the list for **Step 1 Walk Step Name (Input Only)** and **Step 1 Completion Status (Input Only)**. These two variables represent the text name for the link to Screen 1, and the completion status for that step. This continues for Screens 1-10. If you don't plan to use a screen, leave the Name field blank and set the Completion Status field to `{!$GlobalConstant.False}`.



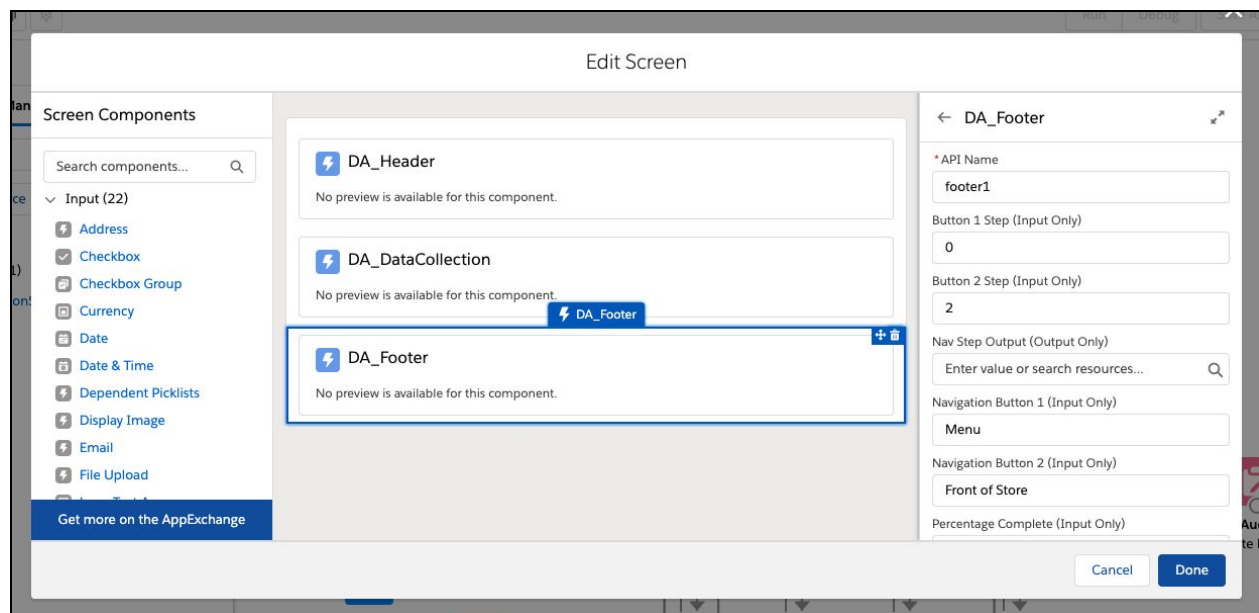
13. You have now defined your navigation menu. That was easy! However, you will have noticed that the flow tracks completion, and presents a progress bar for the user to see how far they are through the audit. Now that you know how many screens you will use, you need to adjust the formula. In your Toolbox, click Manager, and search for **status**. You will see a formula resource returned called **completionStatus**. This tracks the progress of this audit as its in progress. Let's change the formula to reflect the number of screens you have. Double-click on the resource to open it.

14. In the formula box, look at the default formula. It should look like this:

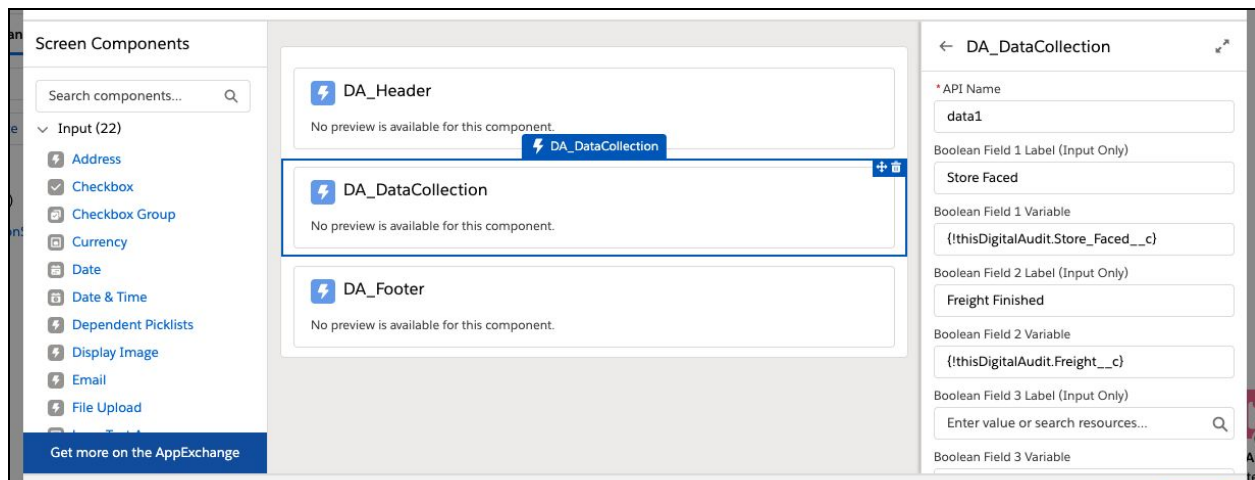
```
( IF({!step1Complete} = TRUE, 1, 0) +  
IF({!step2Complete} = TRUE, 1, 0) +  
IF({!step3Complete} = TRUE, 1, 0) +  
IF({!step4Complete} = TRUE, 1, 0) +  
IF({!step5Complete} = TRUE, 1, 0) +  
IF({!step6Complete} = TRUE, 1, 0) +  
IF({!step7Complete} = TRUE, 1, 0) ) / 7 * 100
```

Modify the formula by adding or removing IF statements to match the number of screens you are using. Also update the divisor at the end to the number of screens.

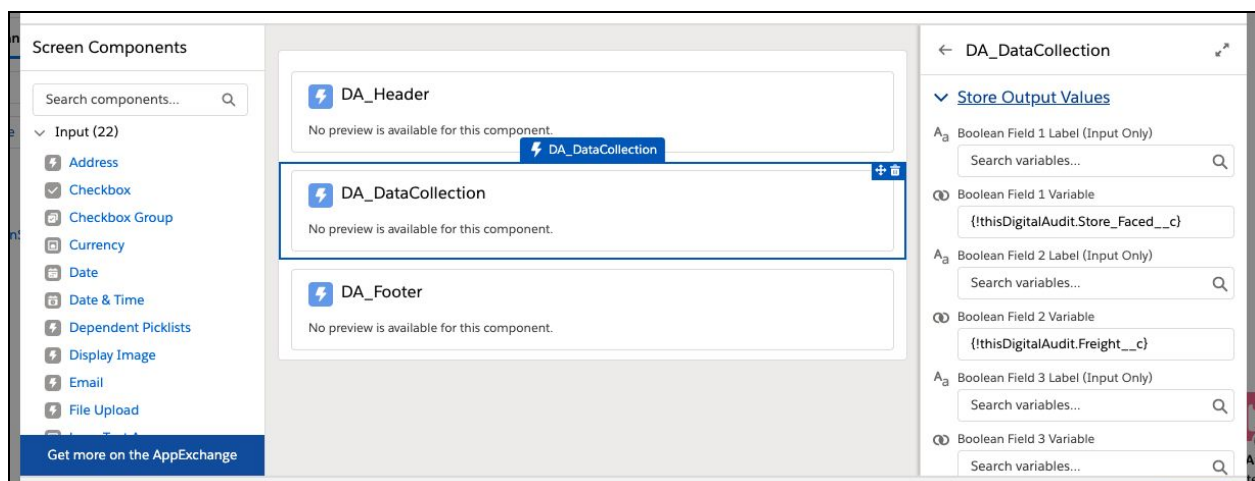
15. Let's start adjusting screens to match your desired user experience. Double-click on the blue screen item called **Screen 1**. You will see the screen has 3 components. The Header is already defined and does not need to be adapted. The Footer has navigation built out with the values 0 and 2. This means that the user will have the option to either return to the navigation menu, or progress to screen 2. You can rename the button to progress forward from the sample text *Front of Store* to the name you gave to Screen 2.



16. The Data Collection component is where you define what text, number, and boolean the user will provide. You will see two variables **Boolean Field 1 Label (Input Only)** and **Boolean Field 1 Variable**. These two variables represent the field name that the user sees, and the location you want to store the data collected. You will want to map the field variable the empty record you created in step 9. They should be in the format **myDigitalAudit.field_name__c**. You can add labels and field variables for your text data, number, and boolean fields.

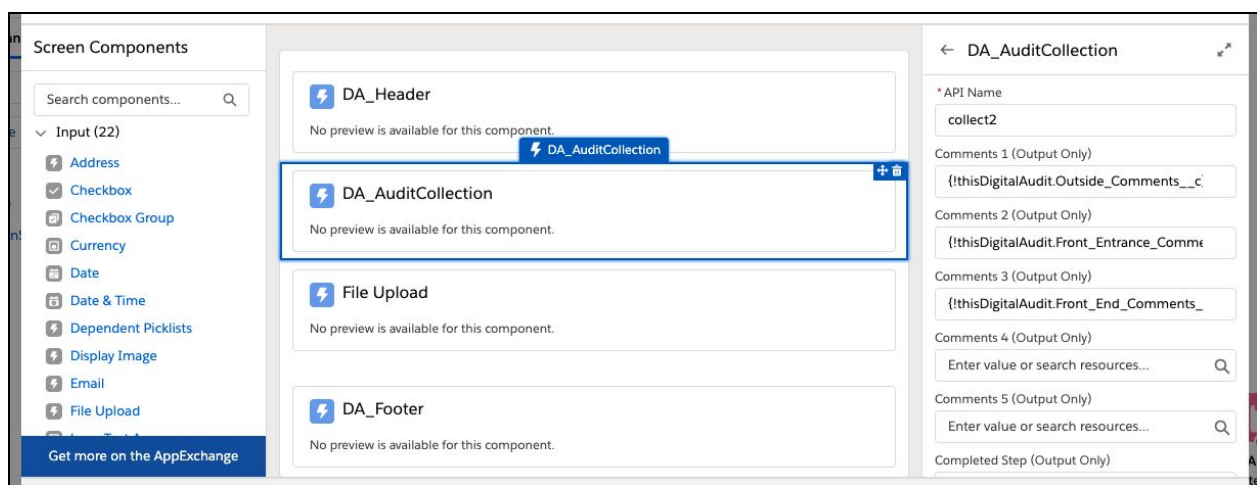


As you scroll down the components properties you will see a section called **Store Output Variables**. In this section, repeat the definition of the fields as you did above. Why do this twice? Great question. The first time through you define the Input Variable, what you want the value to be when the screen loads. This is important to define so that if a user goes back to this screen, the data they collected before will show up. The second time through you define the Output Variable, what gets stored when the user enters information. You need both sides to ensure your users don't get confused where their entries went!



17. Moving on to **Screen 2**, you will notice a similar structure to the previous screen, however the second component is different and there is a component for uploading an image. Edit the Footer on this Screen (and all subsequent screens) similar to step 15.

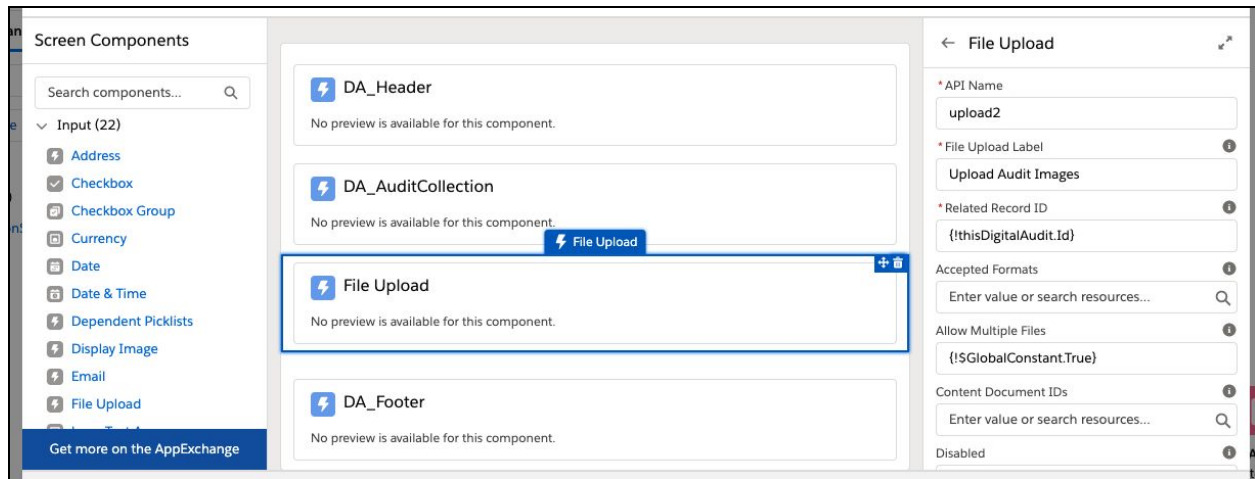
On this screen, you have the Audit Collection component. As mentioned before, this component allows the users to provide the rating and comment for up to 5 departments. You are now going to define which departments should be groups on this first screen. As you scroll through the component properties, you will see a number of Input Variables: Comments 1-5, Expectations 1-5, Rating 1-5, and Tab Name 1-5.



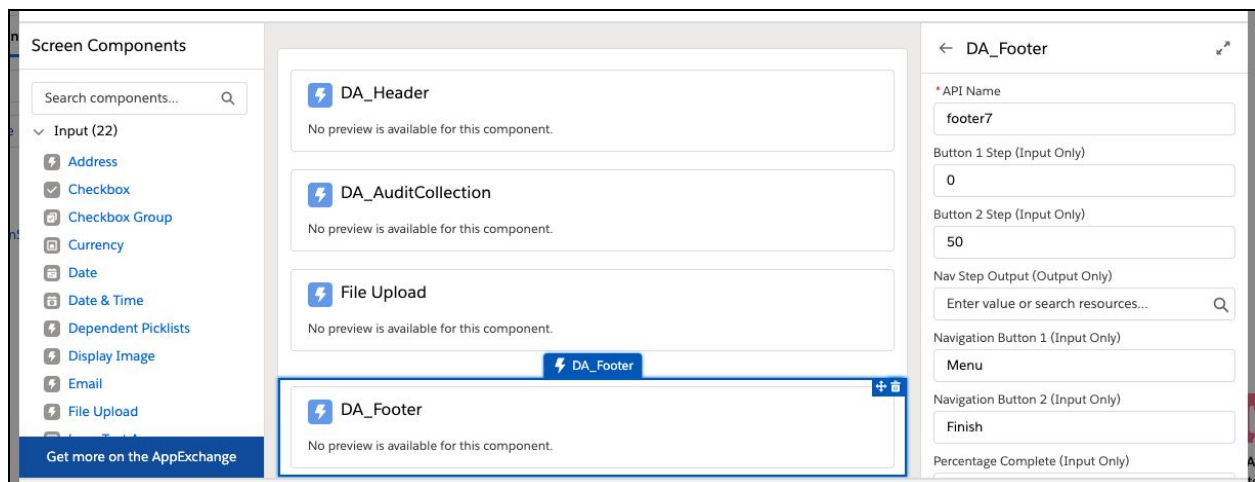
You will now have to compare your Audit Configuration to your report custom object. If you planned your configuration in a logical way, you should be able to start this screen with the first department on your Configuration record, and count up. Start by assigning a field off of your **myDigitalAudit** record to Comments 1, and continue for 2-5 for as many departments as you will have on this screen. They should be in the format **myDigitalAudit.field_name__c**. You will take a similar approach for Rating 1-5, as the input comes from your empty record created before. Tab Name 1-5 and Expectation 1-5 come from your **thisConfiguration** record variable. You didn't need to define this, as it came with the Flow Template. Match your Tab Names and Expectations to your Rating and Comments. They should be in the format **thisConfiguration.Department_1__c**.

Similar to the Data Collection component, you also need to define the Output Variables for your Comments and Ratings. You don't need to do this for Tab Names or Expectations as this data isn't changing on the screen. Update these variables to match above.

18. Before leaving Screen 2, click on the File Upload component. This allows users to attach images, files, etc. to the Digital Audit report. The Flow Template includes this component on all screens with the Audit Collection component. You will need to change the related record the image is attached to. Update the value from *thisDigitalAudit.Id* to **myDigitalAudit.Id**.



19. Repeat steps 17 & 18 for Screens 3-10 where required. The Flow Template includes the Audit Collection component on each of these screens, but you can update it to include the Data Collection component if you choose. If so, repeat step 16.
20. On your last planned screen, update the Footer component to have the value **50** for Button 2 Step. This will ensure the next screen in the navigation is the Finish screen.



21. The last screen in the Flow Template is the Finalization Screen. This is the final check before the Digital Audit report is created, and the user is directed there. You can use this screen to collect any last information, or present a summary to the user. The Flow Template has the Audit Collection component included, but you can modify as you wish.
22. Now that you have collected all of your audit data from your user, you need to configure the final report creation. This is done in two steps: Assigning the remaining values, and updating the record you created off the top. Double-click on the yellow assignment item called **assignAuditHeaderData**. This step allows you to assign formulas and flow metadata to fields on your report, such as Start and End Times, Date, and the Store value. If you want to assign anything else, you can modify this to include additional values. The Flow Template includes assignments referencing the sample Grocery Store Review audit, so let's replace it with your audit report. Update the left hand column fields from *thisDigitalAudit.field_name__c* to **myDigitalAudit.field_name__c**.

Edit Assignment

* Label: assignAuditHeaderData * API Name: assignAuditHeaderData

Description:

Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value	
{!thisDigitalAudit.Start_Time__c}	Equals	{!startTime}	
{!thisDigitalAudit.End_Time__c}	Equals	{!\$Flow.CurrentDateTime}	
{!thisDigitalAudit.Store__c}	Equals	{!storeSelected}	
{!thisDigitalAudit.Date__c}	Equals	{!\$Flow.CurrentDate}	

[+ Add Assignment](#)

[Cancel](#) [Done](#)

23. Now it's time to update the record with all the data collected. Double-click on the pink update item called **updateAuditRecord**. Similar to your create action in step 8, replace the record variable *thisDigitalAudit* with **myDigitalAudit**.
24. Lastly, you will want to simply navigation for your end user by opening the report they just created at the end of the flow. Nothing is worse than doing all that work and then having to hunt to find it. Double-click on the grey action item called **openAuditRecord**. Replace the Input Value from *thisDigitalAudit.Id* to **myDigitalAudit.Id**. This sets the location to send the user when the flow is completed.

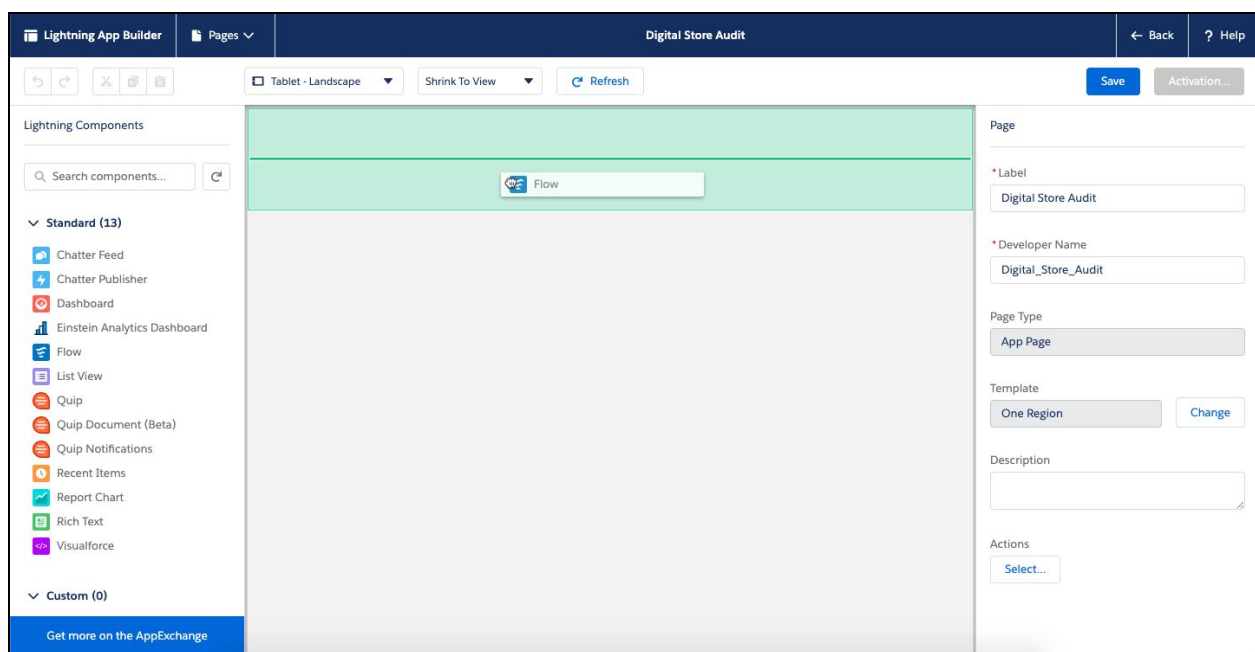
The screenshot shows a configuration window titled "Edit 'DA_OpenRecord' core action". At the top, it says "Use values from earlier in the flow to set the inputs for the 'DA_OpenRecord' core action. To use its outputs later in the flow, store them in variables." Below this, there are two input fields: "Label" with the value "openAuditRecor" and "API Name" with the value "openAuditRecord". A "Description" field is empty. Below these fields are two tabs: "Set Input Values" (which is selected) and "Store Output Values". Under the "Set Input Values" tab, there is a label "Audit to Open (Input Only)" and a text box containing the expression "{!myDigitalAudit.Id}". To the right of this text box is a toggle switch labeled "Include" which is currently turned on. At the bottom right of the window are "Cancel" and "Done" buttons.

25. Save your flow a final time, and hit **Back** in the header to return to the Flow menu. In the list you will now see you new flow, yet you will notice the checkbox for Is Action is not enabled. You need to first activate your flow before you can use it. Click on your flow's name, and it will open the detail record. In the Flow Versions table, click **Activate** on the first (or most recent version) of your flow. You have now fully configured your new Digital Audit!

4. Providing Users Access to your Digital Audit

Now that you have created a Digital Audit report, and a fully functioning flow, it is time to showcase this flow to your users. There are a number of different ways to do this: Embedding on the Home Page, Launching from a Quick Action, or Building it's own App Page. Let's focus on the latter, a dedicated App Page to host the flow for both use on a computer and on a mobile phone or tablet.

1. Before you build your App Page, you need to collect one key value from your work done so far. The **recordId** from your Audit Configuration. If you need to find it, open up the Audit Configuration record you created before and find the record Id on the page layout as a field. Easy!
2. In the Setup Menu, search the Quick Find for Lightning App Builder. In the Lightning Pages table, click on **New** to start a new page. You will first be prompted on the page type - for this use case, select **App Page**. Give your App Page a Name, something that will make sense to Users to find in their Navigation Bar.
3. You can select the layout that works best for you. The Flow Template is designed to work best at 100% width, but can be run at 67% if you desire.
4. In the left toolbox, select and drag the Flow lightning component into a landing zone on your layout.



5. In the right sidebar, you will see a picklist for Flow, where you can select your newly created flow. If you don't see it, make sure you have your flow activated. Update the field for **auditConfiguration** with the record Id you collected in step 1.
6. Click Save at the top of the screen, and Activate your App Page. Choose an App Icon that makes sense, and choose to add this App Page to either your Lightning Experience Apps or your Salesforce Mobile navigation.

Congratulations, you have now set up your new Digital Audit for your users! 🙌

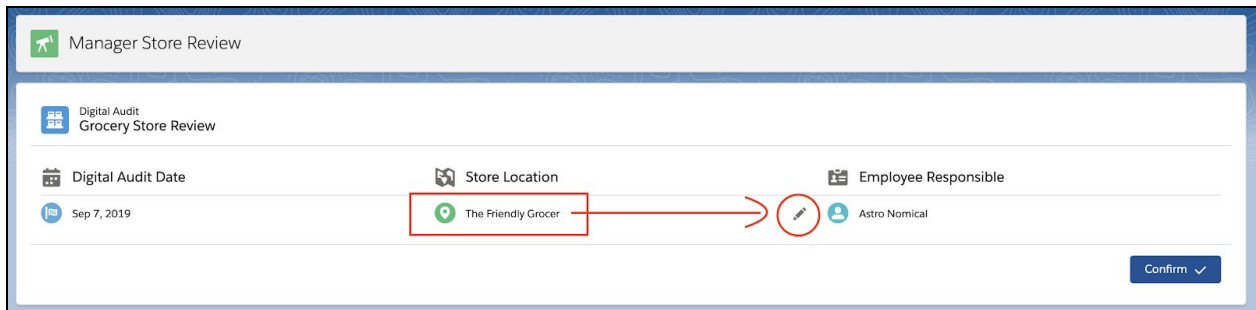
The best part of this being a template, if you can build on it from here. Want to create a workflow rule that notifies someone when an Audit is complete? Go for it. Create a task if a rating is too low? Sounds perfect. Add Chatter to collaborate between users? Now you are getting it! Have fun and start to reap the benefits of digitalizing your paper-based processes.

User Guide

We hope that the Digital Store Audit is relatively intuitive for your end users, but there are a few tips that can help them get started. We've written these tips for a Salesforce Admin to read and understand how to get the most out of this tool, and train their users accordingly.

 Please keep in mind that these documented suggestions are based on the original Flow Template; as you will likely configure and add on to this template, we suggest providing specific User Guide documentation for your team's use.

Store Location



Before beginning your audit, ensure your **Store Location** is set the one you are auditing.

→ Default Store Location

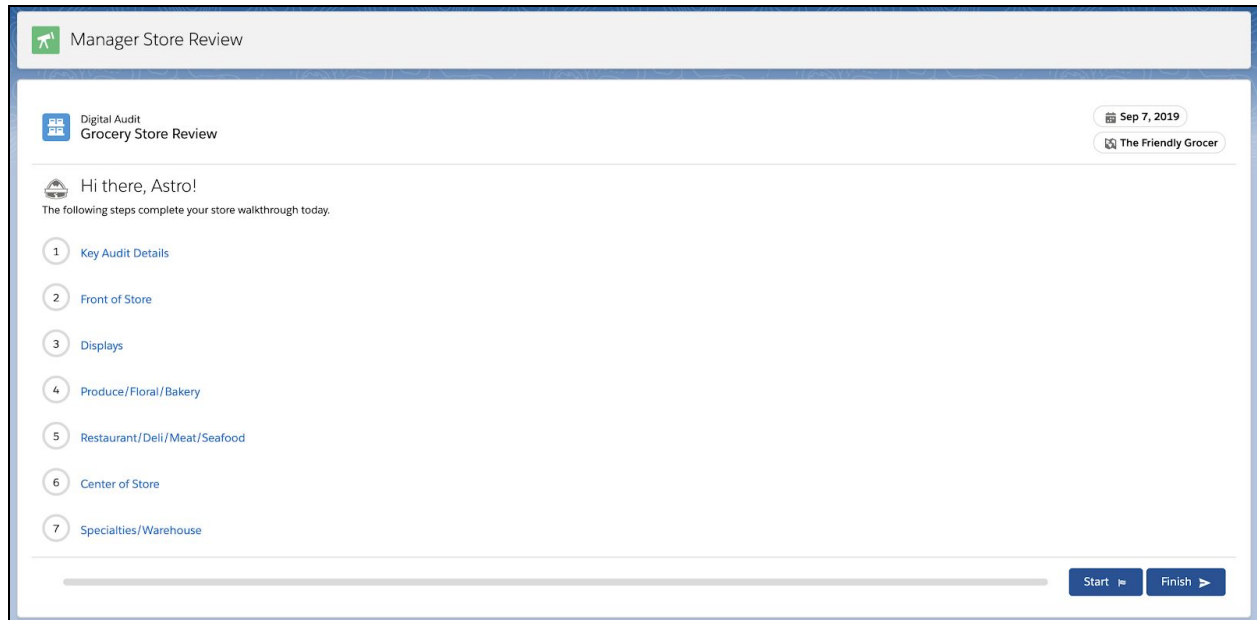
The Store Location will default based on the corresponding Store field value of the running User. Store__c is a custom field included in the Digital Store Audit package that is added to the User Object.

→ Other Store Location

If the user is auditing an alternate location, they can manually select from the list of Stores by clicking on the **pencil icon** beside the Store name.

Navigation

Upon starting a new audit, the user is presented with a navigation Menu:



→ Just start

If the user wants to go in order (from steps 1 → X), they can simply press the **Start** button at the bottom of the page.

→ Start anywhere

If the user wants to begin at a specific Step and then go in order - or jump around in any order - that's supported by this navigation menu.

For example, the user could start by clicking on (4) *Produce/Floral/Bakery*, then go back to this Menu and jump into (2) *Front of Store*, back to the Menu and go to (7) *Specialties/Warehouse*.

As Steps are completed (in full), they will be marked with a check mark on this Menu.

Step Completion

Steps may have multiple sub-sections. In the example below, the Step has sub-sections for *Produce*, *Floral*, and *Bakery* (see left tabs).

As a user enters information on each Step / sub-section, their responses are stored as they go - no need to click a “save” button as you flow through the audit (this helps save time).

They can navigate back to the **Menu** to do the Steps out of order, or, they can go in order by clicking on the other button that will navigate to the next Step. In this example, it is *Restaurant/Deli/Meat/Seafood*.

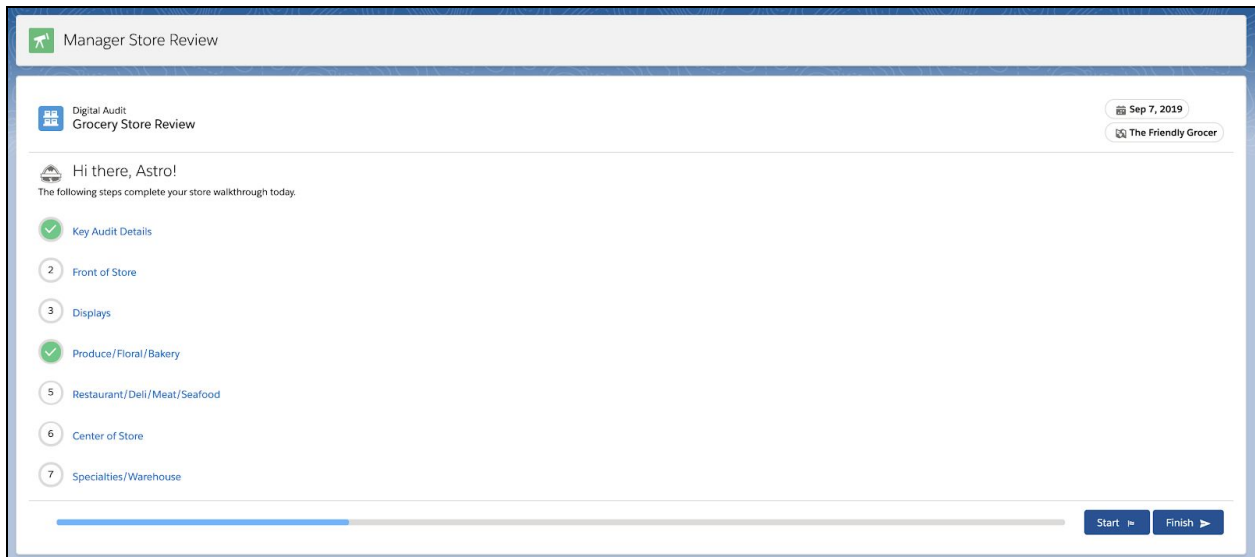
To Finish the Store Audit completely, the user can either proceed through each step in order until the end, or, at any point, they can go back to the **Menu** to see the **Finish** button.

The screenshot displays the 'Manager Store Review' interface. At the top, there's a header with a green icon and the text 'Manager Store Review'. Below this, a sub-header shows 'Digital Audit Grocery Store Review' and a date 'Sep 7, 2019' next to a location icon 'The Friendly Grocer'. On the left, a sidebar contains three tabs: 'Produce', 'Floral' (which is selected), and 'Bakery'. The main content area for the 'Floral' tab is highlighted in yellow and contains a section titled 'Expectations' with a list of bullet points: 'Sweep Log/Greet and Sweep', 'Cull/Quality Check/Dates', and 'Full/Rotated/Overall Cleanliness'. Below this, there's a 'Rating' section with a 'Select One' dropdown and a numeric scale from 0 to 10, where '9' is selected. Underneath the rating is a 'Comments' text area containing the text 'Flowers are fresh and seasonal displays are current.' Below the comments is a rich text editor with a font dropdown set to 'Salesforce Sans', a size dropdown set to '12', and various formatting icons. At the bottom left, there's an 'Upload Audit Images' section with an 'Upload Files' button and the text 'Or drop files'. At the bottom right, there's a progress bar and two navigation buttons: 'Menu' and 'Restaurant/Deli/Meat/Seafood'.

Audit Completion

As each Step is completed in full, it is marked with a green check mark (seen below).

Clicking the **Finish** button will prompt the user to confirm they are done by clicking **Create Audit Report**, and then ends the flow and take the user to the documented results.



The screenshot displays the 'Manager Store Review' interface. At the top, there's a header with a green checkmark icon and the text 'Manager Store Review'. Below this, the main content area is titled 'Digital Audit Grocery Store Review' and includes a date 'Sep 7, 2019' and a store name 'The Friendly Grocer'. A greeting 'Hi there, Astro!' is followed by the text 'The following steps complete your store walkthrough today:'. A list of seven audit steps is shown, each with a circular progress indicator: 1. Key Audit Details (green checkmark), 2. Front of Store (blue circle), 3. Displays (blue circle), 4. Produce/Floral/Bakery (green checkmark), 5. Restaurant/Deli/Meat/Seafood (blue circle), 6. Center of Store (blue circle), and 7. Specialties/Warehouse (blue circle). A progress bar at the bottom shows the completion status, with a blue segment corresponding to the first two steps. At the bottom right, there are 'Start' and 'Finish' buttons.

Note:

Partial Audits are possible. Not all Steps need to be completed to **Finish** the Store Audit.

Expectations (Rich Text)

Wouldn't it be *cool* to know exactly how to lay out your frozen food aisle? 🧊

To really help guide your users while they're in the field, make the most of your *Expectations* section.

Since this is a rich text field, you can add images (e.g. planograms, merchandising guidance) of up to 1 MB, in addition to descriptive written guidelines of what “good” should look like.

Digital Audit

Grocery Store Review

Sep 7, 2019

The Friendly Grocer

Grocery

Dairy

Frozen

Expectations

- Pop Coolers Full
- No Unattended Wheelers On Floor
- Back & Front Ends Tidy
- Displays To Shelves - Holes?
- Shippers - Same Side of Aisle/Tidy
- Back DSD Displays

Rating

Select One

0 1 2 3 4 5 6 7 8 9 10

Comments

Comments

Salesforce Sans 12 B I U L Link Image Video

Upload Audit Images

Upload Files Or drop files