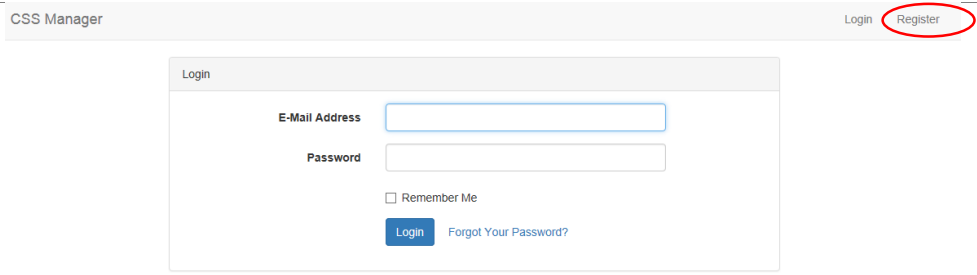
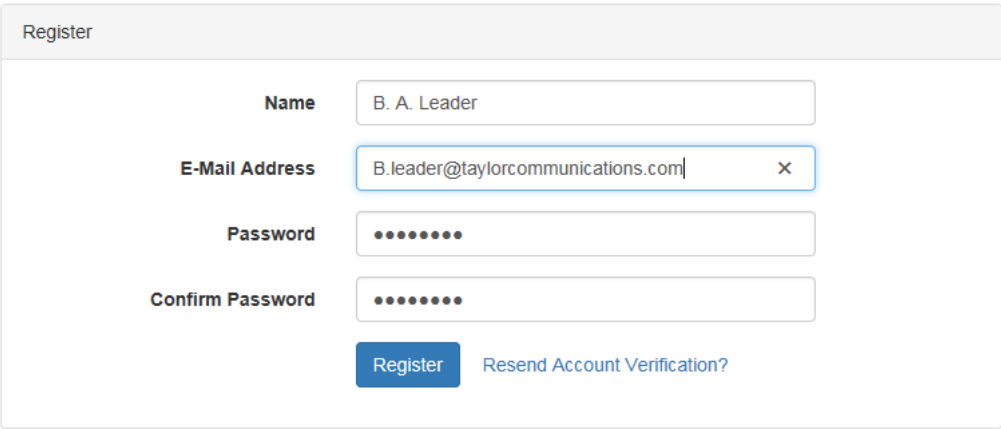
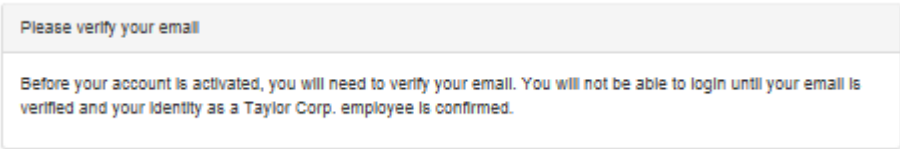
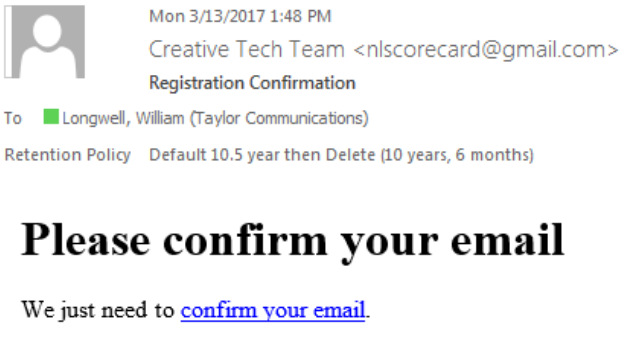


How to Use Audit Website for SFDC Delegation Project

#	Step	Screen Shot
1	<p>How to access</p> <p>http://css-app.tccreativetech.com/ is our sign on page for SFDC delegation audits</p> <p>From here you can log in with your email address and password or select the Register link in the upper right corner of the page.</p> <p>Please note only @taylorcommunications.com emails can be used to register.</p>	 <p>If you receive an error message logging in refresh the site and log on again.</p>
2A	<p>To Register</p> <p>Selecting the Register link on the sign in page will take you to the self-registration screen.</p> <p>Enter your name, email address and create/confirm a password. Password must be at least 10 characters with a mix of upper and lower case letters and a minimum of 1 number.</p>	
2B	<p>After selecting the Register button you will see the "Please verify your email" message and a link will be sent to your email address verifying your set up.</p> <p>If you don't receive the email within 10 minutes select the Resend Account Verification? link</p>	
2C	<p>The verification email will be from nlscorecard@gmail.com and look like the right.</p> <p>Select the confirm your email link to verify identity. You will then be signed in and routed to the audit website.</p> <p>From now on you can log in using your email address and password without verifying identity.</p>	

3 Landing Page

This is the landing page for our audit website.

All users will have access to the **Scorecards** and **Reporting** links. Only administrators will have access to the **Associates** link.

For **reporting** functionality questions please contact William Longwell.

Most of everyone's time will be spent on the **Scorecards** page accessed by the link in the top left of the page.

CSS Manager **Scorecards** Associates Reporting William Longwell

Customer Service Scorecard Manager

Scorecards

To add and review scorecards, please click 'Scorecards' at the top of the page. From there you will be able to view all of your submitted scorecards as well as create new ones.

Associates

You can add, remove, and edit Northern Lights associates by clicking the 'Associates' link located at the top of the page. Please note that you cannot add 2 associates with the same name as there is currently no way to differentiate between them.

Restoring Associates

If you need to restore a previously deleted associate, simply re-add them as you normally would. The system will then offer you the chance to restore the associate.

Reporting

The reporting page allows you to generate an XLS file containing the aggregated data of all scorecards within the specified date range.

The 'Filter By' Options

There are 3 available filtering options for generating reports.

1. Request Date
This will generate a report containing all scorecards whose 'Request Date' falls between the provided values.
2. Review Date
This works just like the 'Request Date' option but with 'Review Date' as the filterable field.
3. Created At
This filter uses the 'Created At' timestamp on each scorecard. This timestamp is the exact date time the scorecard was created by an auditor.

4 Scorecards Page

From this page you can create a new request or view requests completed to-date.

See Step 6 for instructions on viewing completed requests.

To start an audit select the **+New** button.

Request ID Reviewer Associate Associate

Review Date Equal To Score Studio(s)

Type or click individual or multiple studios

Audited by Taylor Communications Clear Filter

Scorecard Overview **+ New**

Request ID	Associate	Reviewer	Studio	Review Date	Score	
4434241	Arnolfo Cuizon (Arnie Swanson)	Dashia Taylor	076	05/09/17	100	View Edit Delete
4429628	Vinoth Kumar (Gary Williams)	Tiffany Pham	098	05/09/17	100	View Edit Delete
4430856	R Chinnasamy	Emily Hall	014	05/09/17	100	View Edit Delete

5 Audit Worksheet

New audits are recorded on this page.

Hover over field names for specific instruction. For example, when you hover over the **Associate Name** field it tells you to select the name of the request delegator.

1. Studios are required to randomly audit 10 delegation requests per week. See best practice at the bottom this document.

2. A request can only be audited once. The site will generate an error message if you enter a request number that has already been audited.

2. **Reviewed By:** field is driven by your log on.

3. **NLC Driven:** is only used by Northern Lights and the TC Steering Group.

4. At least 8 criteria must be applicable for a valid audit. Requests with less criteria can't be saved.

5. For each Area of Focus, the auditor selects: **Yes** if step was completed successfully; **No** if the step was done incorrectly or **N/A** if the step didn't apply

6. A comment for each **No** is required to explain the issue.

7. More information can be entered in the **Additional Auditor Comments:** section but isn't a required field.

8. If you'd like management to examine the audit for validation or questions please check the **Requires Additional Taylor Communications Review:** box.

9. Hit the **Submit** button to complete the audit

Dashboard

• All fields are required

Associate Name: NLC Driven: REQ Number: REQ Date:

Reviewed By: Studio Number: Review Date:

• At least 8 of the criteria below must be applicable to the request for a valid audit
 • Hover over each AoF / criteria for additional details
 • Scorecards must have a total score of 85+ to meet standards

Area of Focus	Worth	Satisfied			Earned	
Acknowledge	Uses Correct Template	5	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	5
	Uses Correct Greeting	8	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	8
	Uses Correct Recipients for Confirmation Email	10	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	10
	Proper Acknowledgment Sent	10	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	10
Define	Associates Correct Account	5	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	5
	Chooses Correct Service Solution	5	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	5
	Uses Correct Record/Inquiry Type	8	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	8
	Uses Correct Specialty Boxes	8	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	8
	Changes Status from New to In Progress	5	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	5
Excel	Assigns to Correct Owner	5	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	5
	Contact Has Been Created/Updated Correctly	8	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	8
	Email Chains were Merged Together in Same REQ Correctly	7	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	7
	Used Chatter/Next Step Field Correctly	7	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	7
Daily Tasks were Followed in Correct Order	4	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A	4	

Total Points:

Additional Auditor Comments:

Requires Additional Taylor Communications Review:

** Best Practice **

Here is an optimal way to find auditable requests using the "Northern Lights Daily Delegation Dashboard" in SFDC.

1. Select the "Requests Delegated Today" widget (chart in top right corner)
2. Scroll down to the bottom of the page and select **Studio Number** from the drop down and click the **Drill Down** button
3. Check the box next to the studio you want to audit and click the **Drill Down** button
4. Scroll to the top of the page and select **Show Details**. Below the graph will now be a list of that studio's requests delegated by Northern Lights.

See pages 6-8 for pictures of this process

6 Scorecards Page

This page will show the requests completed to-date. You can filter the data in several ways

1. Enter a specific request # you want to see in the **Request ID** field
2. Filter by an individual reviewer in the **Reviewer** field
3. Filter by an individual delegator in the **Associate** field
4. Filter by **Review Date** using the calendar widget
5. Filter by audit **Score** using the "Equal To", "Greater Than" or "Less Than" drop down
6. Type or click individual or multiple studios

7. If you are only interested in audits completed by Taylor Communications team members select the "Audited by Taylor Communications" button. Otherwise, the query will also return audits conducted by Northern Lights as part of their continuous improvement feedback look (NLC)

Once you define the criteria select the **Filter** button to display applicable requests and select the **View** link associated with the request

NOTE: Contact William Longwell, Tara Miller or Holli Weaver if you need an audit edited or deleted

Best Practice: By linking the Scorecard page to your internet favorites you can access this page directly after signing in.

Request ID:
 Reviewer:
 Associate:
 Review Date:
 Equal To: Score:
 Studio(s):
 Type or click individual or multiple studios
 Audited by Taylor Communications

Scorecard Overview + New

Request ID	Associate	Reviewer	Studio	Review Date	Score	
4433286	Sweetheart Fosgate	Jacquelyn Roberson	079	05/09/17	92	View Edit Delete
4434241	Arnolfo Cuizon (Arnie Swanson)	Dasha Taylor	076	05/09/17	100	View Edit Delete
4429628	Vinoth Kumar (Gary Williams)	Tiffany Pham	098	05/09/17	100	View Edit Delete
4430856	R Chinnasamy	Emily Hall	014	05/09/17	100	View Edit Delete
4433433	Gladys Bontes	Nennia Seagraves	001	05/09/17	100	View Edit Delete
4432809	Fairose Begum	Tiffany Pham	098	05/09/17	100	View Edit Delete
4433052	Manoj Kumar T	Nennia Seagraves	001	05/09/17	100	View Edit Delete

2

Request ID:
 Reviewer:
 Associate:
 Review Date:
 Equal To: Score:
 Studio(s):
 Type or click individual or multiple studios
 Audited by Taylor Communications

Associate dropdown options:
 R Chinnasamy
 Gladys Bontes
 Fairose Begum
 Manoj Kumar T
 Nennia Seagraves
 Emily Hall
 Tiffany Pham
 Dasha Taylor
 Jacquelyn Roberson
 Sweetheart Fosgate
 Arnolfo Cuizon (Arnie Swanson)
 Vinoth Kumar (Gary Williams)

3

Request ID:
 Reviewer:
 Associate:
 Review Date:
 Equal To: Score:
 Studio(s):
 Type or click individual or multiple studios
 Audited by Taylor Communications

Equal To dropdown options:
 Equal To
 Greater Than
 Less Than

4

Request ID:
 Reviewer:
 Associate:
 Review Date:
 Equal To: Score:
 Studio(s):
 Type or click individual or multiple studios
 Audited by Taylor Communications

Calendar widget showing dates from May 2017 to July 2017.

5

Request ID:
 Reviewer:
 Associate:
 Review Date:
 Equal To: Score:
 Studio(s):
 Type or click individual or multiple studios
 Audited by Taylor Communications

Studio(s) dropdown options:
 001
 014
 076
 079
 098

6

Request ID:
 Reviewer:
 Associate:
 Review Date:
 Equal To: Score:
 Studio(s):
 Type or click individual or multiple studios
 Audited by Taylor Communications

7

Audited by Taylor Communications

7

Scorecard View Page

When you select view the applicable request will be presented in this format.

You will recognize most fields from the Audit Worksheet section (#5 in this document), however there are 2 new fields.

1. 1/1 Review Complete: box is checked after management has completed a 1-over-1 review of the audit. Most of these requests are flagged as **NLC Driven:** and **Requires Additional Taylor Communications Review:**.

2. Last Edited By: field systematically captures the name of the last person to edit the request other than the original auditor.

Scorecard Overview

Associate Name: Joshua Fajardo (Josh Ferguson) NLC Driven: REQ Number: 4155180 REQ Date: 03/10/2017 Total Points: 83

Reviewed By: Usha Ramanl Studio Number: 087 Review Date: 03/13/2017

• Scorecards must have a total score of 86+ to meet standards

Area of Focus		Worth	Satisfied	Earned
Acknowledge	Uses Correct Template	6	N/A	6
	Uses Correct Greeting	8	N/A	8
	Uses Correct Recipients for Confirmation Email	10	N/A	10
	Proper Acknowledgment Sent	10	No	0
	Explanation:			
An acknowledgement should be sent.				
Define	Associates Correct Account	6	Yes	6
	Chooses Correct Service Solution	6	Yes	6
	Uses Correct Record/Inquiry Type	8	Yes	8
	Uses Correct Specialty Boxes	8	Yes	8
	Changes Status from New to In Progress	6	Yes	6
	Assigns to Correct Owner	6	Yes	6
Excel	Contact Has Been Created/Updated Correctly	8	Yes	8
	Email Chains were Merged Together in Same REQ Correctly	7	N/A	7
	Used Chatter/Next Step Field Correctly	7	No	0
	Explanation:			
	Should not be a #Ack/NAR			
	Daily Tasks were Followed in Correct Order	4	Yes	4

Total Points: 83

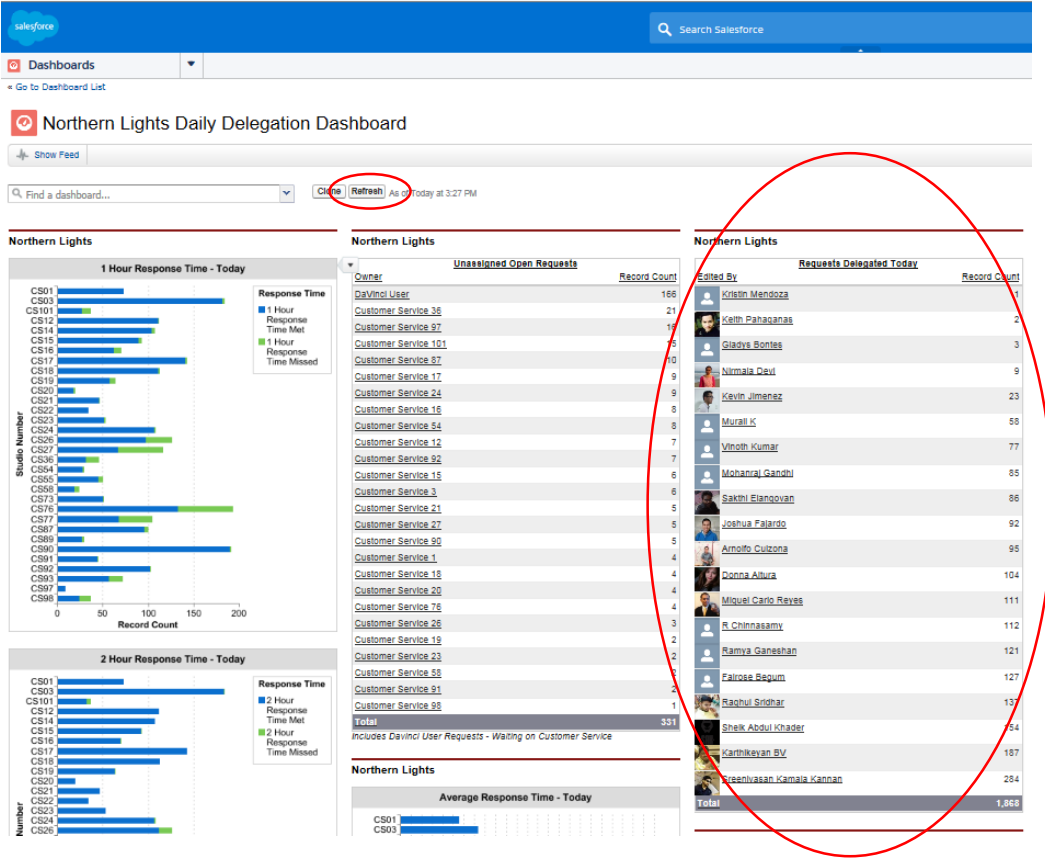
Auditor Comments:
N/A

Requires Additional Taylor Communications Review:

1/1 Review Complete:

Last Edited By: N/A

How to Select Studio Requests to Audit

#	Step	Screen Shot
1	<p>Go to the "Northern Lights Daily Delegation Dashboard" in SFDC.</p> <p>Refresh the dashboard using the Refresh button as F5 will not refresh the dashboards.</p> <p>Select the "Requests Delegated Today" widget (chart in top right corner)</p>	 <p>The screenshot shows the Salesforce interface for the "Northern Lights Daily Delegation Dashboard". At the top, there is a search bar and a "Dashboards" dropdown menu. Below this, the dashboard title "Northern Lights Daily Delegation Dashboard" is displayed, along with a "Show Feed" button and a search bar for dashboards. A red circle highlights the "Refresh" button in the top right corner of the dashboard area.</p> <p>The dashboard contains several widgets:</p> <ul style="list-style-type: none"> Northern Lights 1 Hour Response Time - Today: A horizontal bar chart showing response times for various Studio Numbers (CS01 to CS98). The legend indicates "1 Hour Response Time Met" (blue) and "1 Hour Response Time Missed" (green). Northern Lights 2 Hour Response Time - Today: A horizontal bar chart showing response times for various Studio Numbers (CS01 to CS26). The legend indicates "2 Hour Response Time Met" (blue) and "2 Hour Response Time Missed" (green). Northern Lights Unassigned Open Requests: A table listing unassigned open requests with columns for "Owner" and "Record Count". Northern Lights Requests Delegated Today: A table listing requests delegated today with columns for "Requested By" and "Record Count". Northern Lights Average Response Time - Today: A small bar chart showing average response times for Studio Numbers CS01 and CS03.

2 Scroll down to the bottom of the page and select **Studio Number** from the drop down and click the **Drill Down** button

Report Generation Status: Complete

Report Options:

Summarize information by: Edited By | Summarize information by: Edit Date | Show: All requests

Time Frame: Date Field: Edit Date | Range: Today | From: 07/13/2017 | To: 07/20/2017

Run Report | Show Details | Customize | Save As | Printable View | Export Details | Subscribe

Record Count

Edited By

Note: You ran this report by clicking a dashboard component. Results may differ from the dashboard due to your security settings.

Filtered By: Edited By equals Mohanraj Gandhi,Parvati Begum,Sreenivasan Kamala Kannan,Usha Harman,Nirmala Devi,Nivedha Mohan Kumar,Hajjagopal Mahendharan,Hariya Ganeshan,S AND field / Event equals Owner Clear

Edited By	Edit Date	Record Count	Grand Total
<input type="checkbox"/> Arnolfo Couto	Record Count	95	95
<input type="checkbox"/> Donna Altuna	Record Count	109	109
<input type="checkbox"/> Parvati Begum	Record Count	133	133
<input type="checkbox"/> Usha Harman	Record Count	3	3
<input type="checkbox"/> Josefa Parvati	Record Count	92	92
<input type="checkbox"/> Sreenivasan Kamala Kannan	Record Count	187	187
<input type="checkbox"/> Kevin James	Record Count	23	23
<input type="checkbox"/> Miguel Carlo Ortega	Record Count	119	119
<input type="checkbox"/> Mohanraj Gandhi	Record Count	90	90
<input type="checkbox"/> Nirmala D	Record Count	85	85
<input type="checkbox"/> Nirmala Devi	Record Count	9	9
<input type="checkbox"/> Usha Harman	Record Count	144	144
<input type="checkbox"/> Hariya Ganeshan	Record Count	124	124
<input type="checkbox"/> U.Chinnakannan	Record Count	115	115
<input type="checkbox"/> Nivedha Mohan Kumar	Record Count	86	86
<input type="checkbox"/> Sreejith Alabai Khandar	Record Count	180	180
<input type="checkbox"/> Sreenivasan Kamala Kannan	Record Count	284	284
<input type="checkbox"/> Vinoth Kumar	Record Count	86	86
Grand Total	Record Count	1,924	1,924

Check rows to filter, then drill down by: --None--

<input type="checkbox"/> Sreenivasan Kamala Kannan	Record Count	284	284
<input type="checkbox"/> Vinoth Kumar	Record Count	86	86
Grand Total	Record Count	1,924	1,924

Check rows to filter, then drill down by: **Studio Number**

3 Check the box next to the studio you want to audit

Select the **Drill Down** button to only show the applicable studio records

	Studio Number	Record Count	Edit Date 3/21/2017	Grand Total
<input type="checkbox"/>	C\$01	Record Count	96	96
<input type="checkbox"/>	C\$03	Record Count	185	185
<input type="checkbox"/>	C\$12	Record Count	142	142
<input type="checkbox"/>	C\$14	Record Count	216	216
<input checked="" type="checkbox"/>	C\$15	Record Count	162	162
<input type="checkbox"/>	C\$17	Record Count	114	114
<input type="checkbox"/>	C\$24	Record Count	113	113
<input type="checkbox"/>	C\$76	Record Count	106	106
<input type="checkbox"/>	C\$87	Record Count	122	122
<input type="checkbox"/>	C\$90	Record Count	135	135
Grand Total		Record Count	1,391	1,391

Check rows to filter, then drill down by: --None-- **Drill Down**

4 Scroll back to the top of the page and select **Show Details**.

Requests Delegated This Week - NL

Report Generation Status: Complete

Report Options:

Summarize information by: Studio Number | Summarize information by: Edit Date | Show: All requests

Run Report **Show Details** Customize Save As Printable View Export Details Subscribe

5 Below the graph will now be a list of that studio's requests delegated by Northern Lights

	Studio Number	Record Count	Edit Date 3/13/2017	Grand Total	Request: Request Name	Field / Event	Old Value	New Value	Request: Ow
<input checked="" type="checkbox"/>	C\$01	Record Count	95	95					
			1		REQ-4159007	Owner	Customer Service 1	Nennia Seagraves	Nennia Seagr
			1		REQ-4159006	Owner	Customer Service 1	Nennia Seagraves	Nennia Seagr
			1		REQ-4159004	Owner	Customer Service 1	Nennia Seagraves	Nennia Seagr
			1		REQ-4159003	Owner	Customer Service 1	Stephanie Hunter	Aaron Price
			1		REQ-4159002	Owner	Customer Service 1	Stephanie Hunter	Aaron Price
			1		REQ-4159165	Owner	Customer Service 1	Stephanie Hunter	Aaron Price
			1		REQ-4159127	Owner	Customer Service 1	Stephanie Hunter	Aaron Price
			1		REQ-4159104	Owner	Customer Service 1	Stephanie Hunter	Rhonda Wells
			1		REQ-4159087	Owner	Customer Service 1	Betty Wills	Betty Wills
			1		REQ-4159046	Owner	Customer Service 1	Stephanie Hunter	Kathryn Alvar

For any questions with this site please contact Holli Weaver or William Longwell

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