

Log into Intouch Insight

To access data for your mystery shop (or other) programs, log into the Intouch Insight platform [here](#).

You should have received an account confirmation with instructions on activating your user account when it was set up.

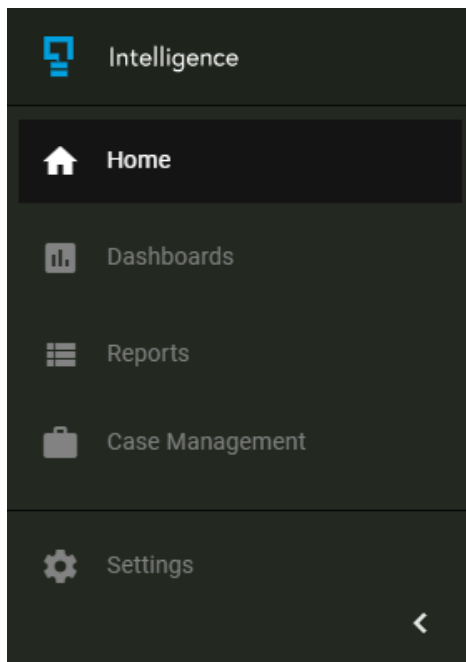
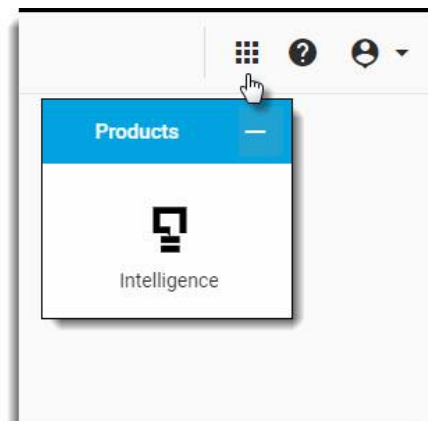
If you did not activate your account at that time or did not receive the email, contact your program administrator and ask them to resend the notification.

Navigate to IntouchIntelligence

The Intouch report platform is IntouchIntelligence (IQ).

When you log in, you will land on the **IQ Home** page by default.

If you are working in a different product, click on the **product navigation** icon found in the header of the page you are viewing, then click on **Intelligence** to return to IQ.



On the **IQ Home** page, you see widgets and tables that provide a summary of the most recent activity on all your programs. For example, the number of records received, last records received, etc.

When applicable, you can also view a list of dashboards or reports that you have “favorited”, and easily navigate to a dashboard or report.

You may also see a list of “cases” that have recently been updated.

Cases are action plans that are used to identify potential concerns that may need to be addressed with a customer or at a location.

Depending on which features your organization is using and how your user account is configured, you may see different options in the IQ navigation menu and different widgets/tables on the IQ Home page.

There are many ways to view your program data in IQ.

In this guide, we will focus on the **Standard Dashboards** and **Standard Reports**.



Standard Dashboards

The Standard Dashboards in IQ provide several preconfigured summaries and dashboards.

Click on the **Dashboards** icon in the left-side navigation menu to view the Standard Dashboards.


The summaries and dashboards that are available to you will vary, depending on which products you have access to.

The data that is available in the Standard Dashboards is limited, based on each user's hierarchy access level.

Hierarchy Summary

Choose a **product**, **program**, and **hierarchy node** to view a list of the records that have been submitted for the locations in that node.

Click on any record in the list to view the individual record report.

Or click on the  icon above the table to switch to view a breakdown of results by hierarchy node.

Apply a hierarchy filter to drill into another node in the hierarchy.

Record Summary

Choose a **product** and **program** to generate a summary of the records that have been submitted, including average score, records received, and a response breakdown.

Audit Dashboard

This dashboard is only available to organizations using IntouchAudit.

It provides several widgets, including Average Score, Records Received, and Top Issues.

Check Dashboard

This dashboard is only available to organizations using IntouchCheck.

It provides several widgets, including Average Score, Records Received, Average Record Completion Time and Outcomes.

Shop Dashboard

This dashboard is only available to organizations using IntouchShop.

It provides several widgets, including Average Score, Records Received, and Top Opportunities.

Survey Dashboard

This dashboard is only available to organizations using IntouchSurvey.

It provides several widgets, including Average Score, Records Received, and Scoring Breakdown.

Location Dashboard Search for and **select a specific location** to view location-specific data on several widgets and charts.


Media Gallery Dashboard The Media Gallery displays all photos, and audio and video files that have been uploaded to a record.


You can **filter to view files for a specific question**.

Past 30 Days ▾



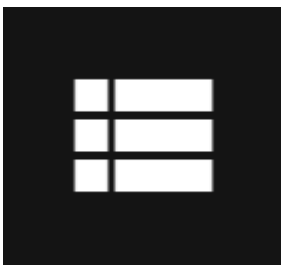
Data in the Standard Dashboards can be filtered by date, pre-set filters, or a wide range of other parameters.

Click on the  to see all available filter options.

Mouse over a widget and click on the  to view a list of the records that are included in the results, and then click on any record in the list to view the individual record report.

You can also download and/or set up a subscription (scheduled export) on many of the dashboards.

Standard Reports



The Standard Reports in IQ provide users with a list of Audit, Check, Shop, and Survey records.

Click on the **Reports** icon in the left-side navigation menu to view the Standard Dashboards.

The standard report reports that are available to you will vary, depending on which products you have access to.

The data that is available in the reports is limited, based on each user's hierarchy access level.

Audit Records

This report is only available to organizations using IntouchAudit.

The Audit Records report include document date, report cycle, record score, etc.

Check Records

This report is only available to organizations using IntouchCheck.

The Check Records report include document date, auditor name, outcome, record score, etc.

Shop Records

This report is only available to organizations using IntouchShop.

The Shop Records report includes document date, report cycle, record score, etc.

Survey Records


This report is only available to organizations using IntouchSurvey.

The Survey Records report include document date, distribution type, survey name, record score, etc.

Past 30 Days ▾



Data in the Standard Reports can be filtered by date, pre-set filters, or a wide range of other parameters.

Click on the  to see all available filter options.

You can also search by column for specific results or download the Standard Reports.
