



Login to the System (Page 4)

Go to www.customerimpactinfo.com.

Click on the "Customers" tab.

Click on the "Customer Login" link.

Enter your: Company Name, Manager Login Name, and Password

Get Help?? (Page 6)

Click the Help Button for information relative to the page

Contact MSP for technical issues

Understand Scoring Rules & Survey Settings (Page 11)

Every Survey has a set of rules and scoring presets.

Read more about OVERALL SCORE, SECTIONAL and SUBSECTIONAL SCORES, LOCATION YTD and SURVEY YTD SCORES, BONUS POINTS, NOT APPLICABLE (N/A) , and CUSTOM SCORING.

View Company Shop Logs (Page 6)

The Shop Logs provide a functional list of shops completed, using the criteria you set.

From the Home Page, Click Shop Logs

Select criteria if desired, click GO

Click Screen or PDF, depending on desired view.

At that point it may be printed, or emailed.

View Completed Surveys by Location (Page 12)

Displays a list of all locations sorted by location name.

Click Locations from Main Page or top Navigation Bar

...or Click Locations and type specific information, click GO

Click Surveys to the right of the Location ID and information

Click Screen or PDF for desired view

Details Link

Allows you to view the location information, including the managers, for that location.

Surveys Link

Displays the Quick Shops view of individual shops scores for that location. It includes all shops for the current year to date, sorted by shop date.

View Reports (Pages 13-34)

Click Reports from Main Page or top Navigation Bar

Choose type of Report, click down arrow to specify, Click GO

Select criteria if desired, click Full View, Print View *

View Company Overview Report (Page 14)

Shows scores at every company subdivision or location within a display of the company's structure.

Click Reports, Location Reports, Select Company Overview

Specify information to review

Click Full View, Print View *

Identify Problem Areas (Location Wizard) (Pages 16-17)

Interactive report that allows you to drill down through the subdivisions of your company.

Click Reports, Location Reports, Select Location Wizard

Specify information to review

Click Full View, Print View *

View Quick Ranking Report (Page 17)

Allows the user to generate a ranked shop list of selected subdivisions.

Click Reports, Location Reports, Select Quick Ranking

Specify information to review

Click Full View, Print View *

View Quick Shops Report (Page 18)

Allows the user to generate a basic list of shops for a subdivision or location.

Click Reports, Location Reports, Select Quick Shops

Specify information to review

Click Screen or PDF for desired view

Compare Subdivisions (Trending & Graph Reports) (Pages 24-28)

Reports that provide statistical data over time, sometimes graphically.

Click Reports from Main Page or Top Navigation Bar

Select Trending & Graph Reports, Choose Line Graph

Click the down arrow next to the colored line, select subdivision

Choose another subdivision within a colored line

Select criteria if desired, click Full View, Print View *

View Survey Summaries (Page 22)

Shows how a specific subdivision (or the entire company) answered every question.

Click Reports from Main Page or Top Navigation Bar

Select Survey Reports, Choose Survey Summary

Select criteria if desired, click Full View, Print View *



View a Question Correlation Report (Page 21)

Allows managers to select one question and view how the answers to that one question correlates to the overall shop score.

Click Reports from Main Page or Top Navigation Bar
Select Survey Reports, Choose Question Correlation
Select the question and criteria, click Full View, Print View

Compare and Average Multiple Surveys (Page 29)

Displays a summary of each survey's averages, then an overall summary of all surveys averaged together.

Click Reports from Main Page or Top Navigation Bar
Select Survey Reports, Choose Multiple Survey Reports
Select criteria if desired, click Full View, Print View

View list of answers for one specific question (Pages 18-20)

(Answer Summary)

Allows the user to see all answers for an individually chosen question.

Click Reports from Main Page or Top Navigation Bar
Select Survey Reports, Choose Answer Summary Reports, Click GO
Select criteria if desired, click Full View, Print View

Graph results of performance (Pages 13-34)

Many reports show the results in Graph Format: Answer Summary, Survey Trending, Trending & Graph – 1 Year Report, Line Graphs, Multiple Survey Report, and Demographic Report.

Click Reports from Main Page or top Navigation Bar
Choose type of Report, click down arrow to specify, Click GO
Below the SHOW area graph options will appear for selection.
Select criteria if desired, click Full View, Print View

View Exception Report (Page 15)

Allows managers to quickly identify exceptionally good or poor subdivisions.

Click Reports, Location Reports, Select Exception Analysis
Specify information to review
Click Full View, Print View

View Survey Trends Over Time (Page 23)

Select up to 5 questions, sections or shop scores and view their performance for 4-12 periods by either text answer or related score.

Select Survey Reports, Choose Survey Trending, Click GO
Select up to 5 questions or sections, click Full View, Print View
Report displays data and graph.

Compare One Period's Results to Other Periods (Page 28)

(Period Comparisons)

Compare the results of one reporting period of your choice against the cumulative results of the current and past year.

Select Survey Reports, Choose Period Comparison, Click GO
Specify information to review
Click Full View, Print View

Send Results to Managers

Email Link Distribution (Page 34)

Users with the appropriate permissions may use EMAIL LINK

DISTRIBUTION send email links of the finalized surveys to all managers.

Select Report Distribution, Choose Email Link Distribution, Click GO
Complete the form as desired, select "Show me a preview of 50 emails"

PDF Report (Pages 33, 34)

Allows the user to generate a "Custom Date Range" PDF Report, a Monthly PDF Report, or a large annual booklet of all shops in PDF format.

Select PDF/Printable Reports, Choose Custom Date Range or Monthly & Annual Reports. Select the criteria desired, click Calculate Number of Shops. Click Generate Report.

View Manager Report (Page 31)

View each manager's performance (including results for all positions they have held in the company).

Click Reports from Main Page or Top Navigation Bar
Click Manager Report Button
Select Manager Type and desired criteria
Click Full View, Print View

Demographic Report (Page 32)

Provides an analysis of the type of shoppers who performed the shops and average shop scores given by each type.

Click Reports from Main Page or Top Navigation Bar
Click Demographic Report Button
Select Demographic information and desired criteria,
Click Full View, Print View

* Ability to generate PDF or Excel documents may also be available options.