



SmartAudit™ Email Customization

360iQ's **SmartAudit™ Email Customization** feature lets you tailor your SmartAudit™ notification emails to enhance communication and improve customer engagement.

Content

In this guide, we will cover the following topics:

- [Configuring Standard Email Customization](#)
- [Configuring Rules-Based Email Customization](#)

Configuring Standard Email Customization

This feature allows you to configure multiple locations at once, but each location can only have **one** configuration.

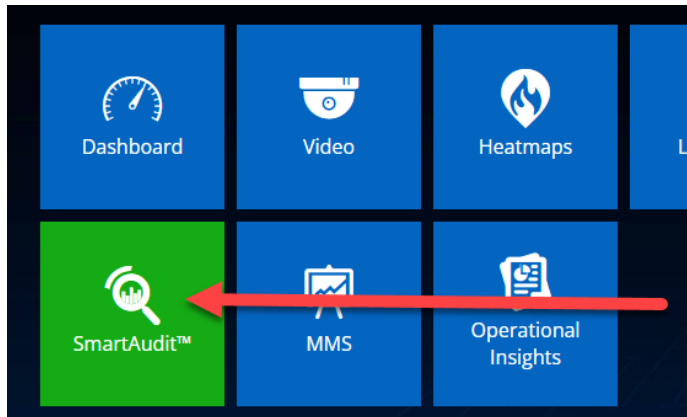
Note: To access the **SmartAudit™ Email Customization** feature, you must have the proper permissions. If you cannot access the tile, please contact [Support](#).

To configure this feature, proceed as follows:

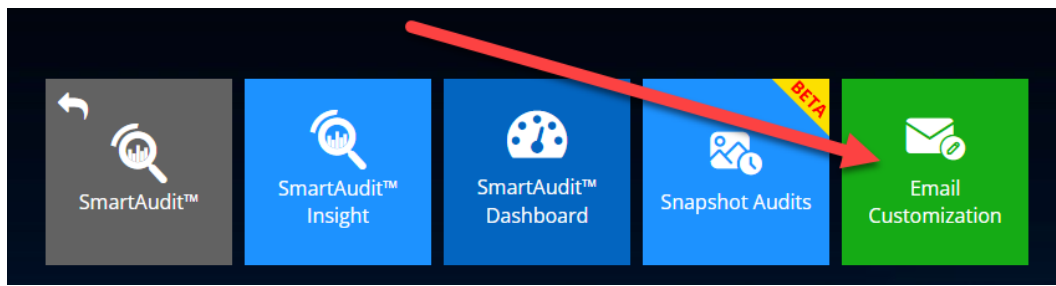
1. Log in to 360iQ: <https://app.go360iq.com>.



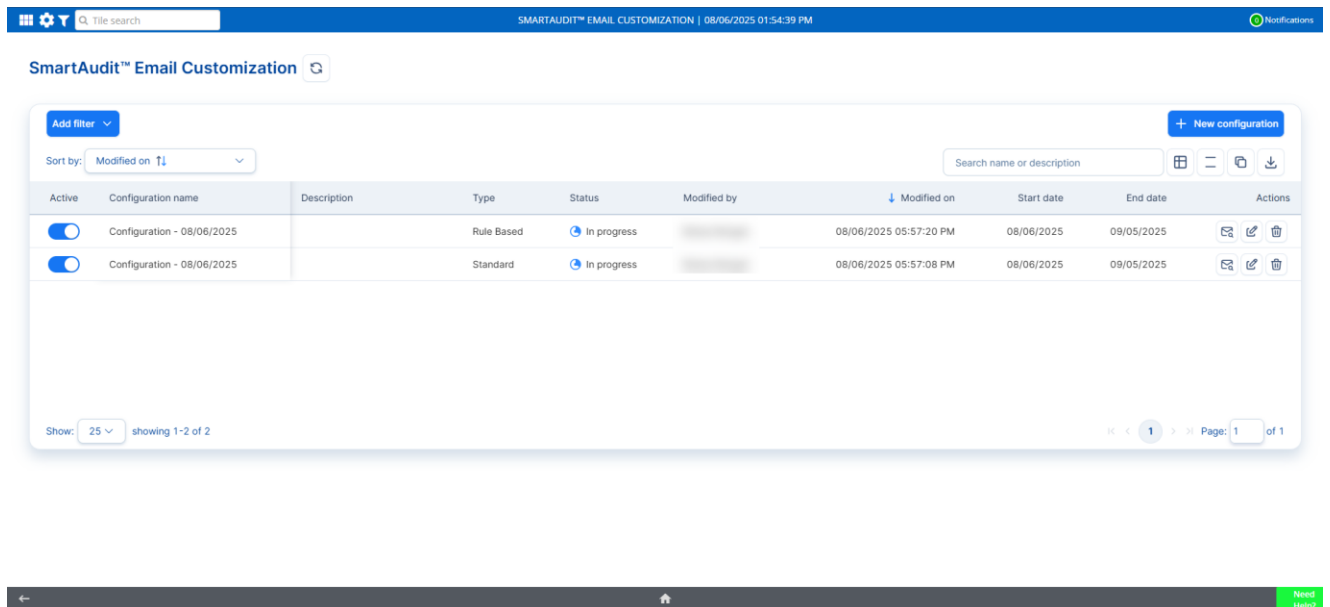
2. Click the **SmartAudit™** tile.



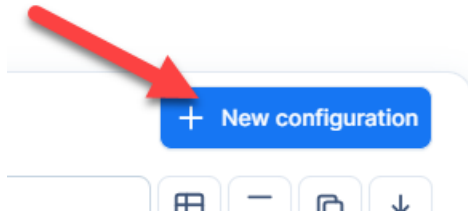
3. Click the **Email Customization** tile.



4. Here, you can view, edit, delete, or create email configurations. You will see all current configurations with columns for configuration details (name, description, dates, created by, etc.).



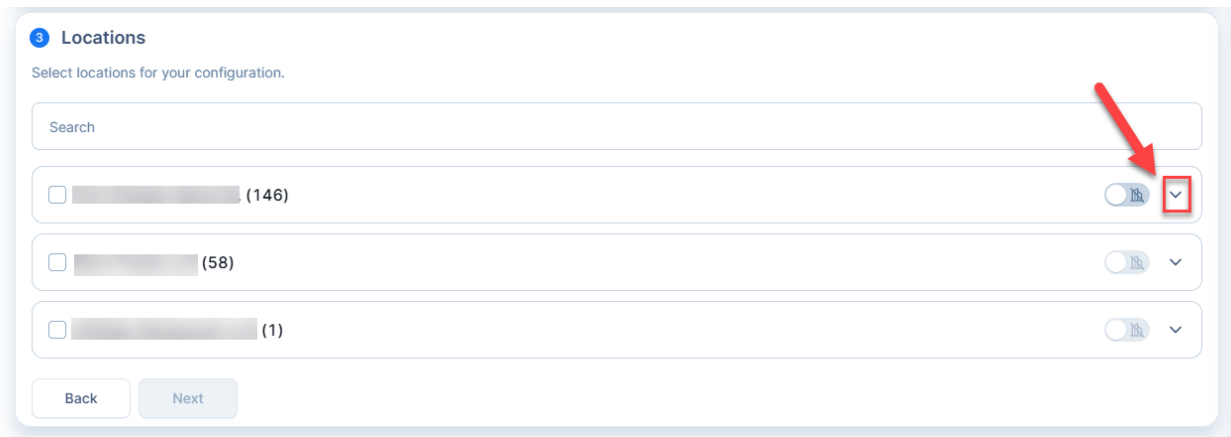
5. To create a new configuration, click **+ New configuration**.



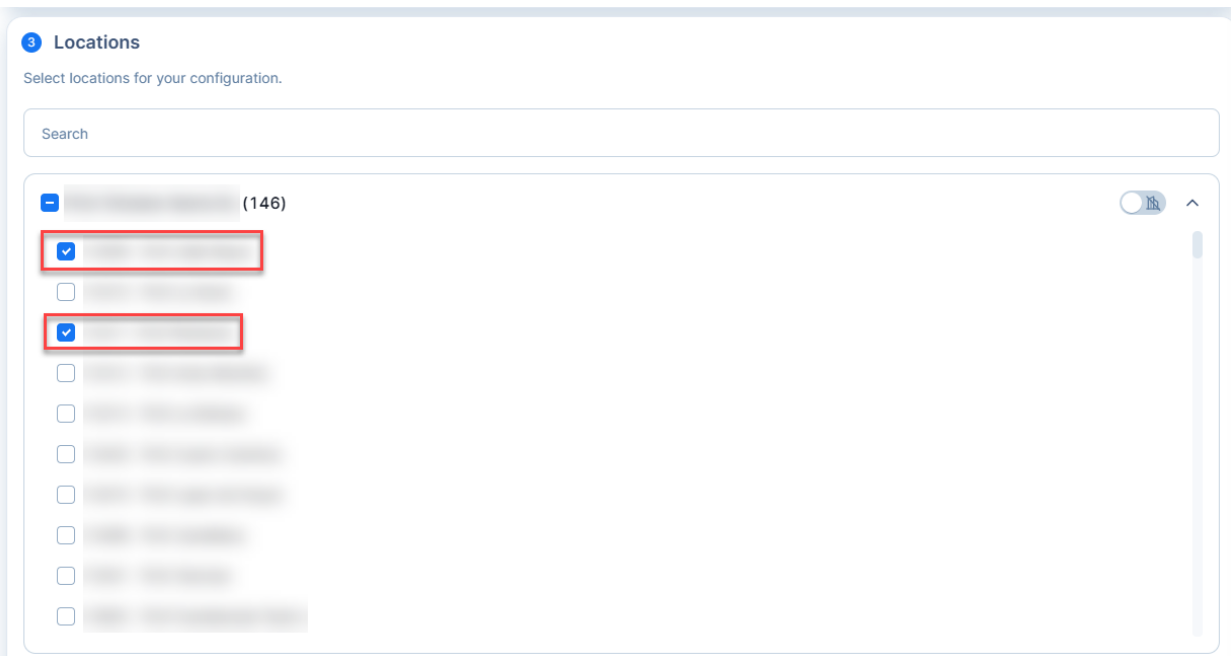
6. A modal will open. By default, the **Standard Category** should be selected. If it is not, select that option, then click **Next**.

7. Define your email configuration settings. Choose your **start** and **end dates**, **name** the configuration, and add a **description** if desired. Once you are satisfied with these settings, click **Next** again.

8. Select the **locations** for your configuration. Click the **dropdown arrow** to view all available locations or use the **search bar** to find a particular location.

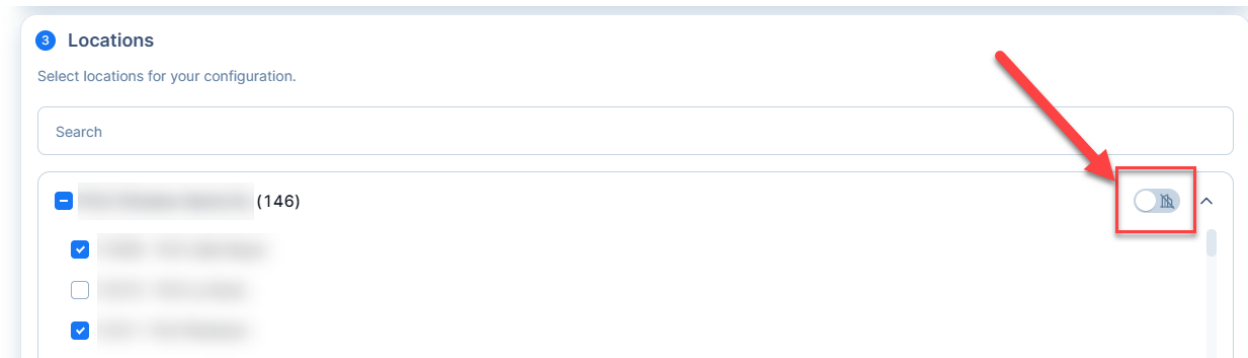


The screenshot shows the 'Locations' configuration screen. At the top, there is a search bar. Below it, a list of organizations is displayed, each with a checkbox, a blurred name, and a count in parentheses. The first organization has a count of (146), the second (58), and the third (1). To the right of each organization name is a toggle switch and a dropdown arrow. A red arrow points to the dropdown arrow of the first organization, which is also enclosed in a red box. At the bottom, there are 'Back' and 'Next' buttons.



This screenshot shows the same 'Locations' configuration screen, but with the dropdown menu for the first organization open. The dropdown menu displays a list of individual locations, each with a checkbox. The first two locations in the list have their checkboxes checked and are highlighted with red boxes. The rest of the locations in the list have unchecked checkboxes. The organization name and count (146) are visible at the top of the dropdown menu.

You can also flip the **toggle** beside the **organization name** to select the whole organization and include any future locations added in the current configuration.



3 Locations
Select locations for your configuration.

Search

☒ [Redacted] (146)

☒ [Redacted]

☐ [Redacted]

☒ [Redacted]

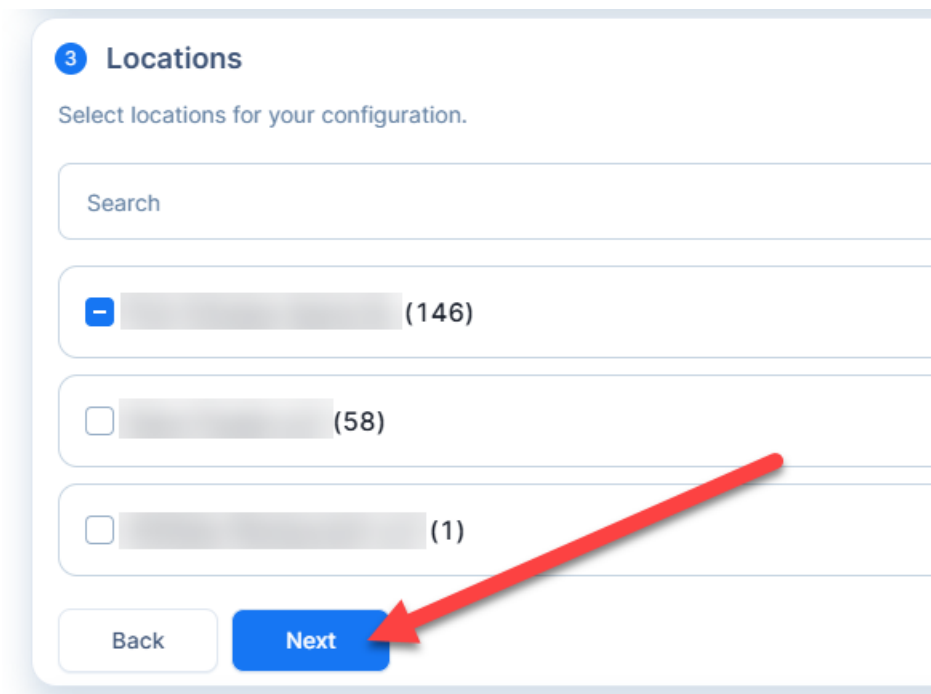
☐ [Redacted] (146)

☐ [Redacted] (58)

☐ [Redacted] (1)

☐ [Redacted] (1)

Once you have chosen your locations, click **Next** to continue.



3 Locations
Select locations for your configuration.

Search

☒ [Redacted] (146)

☐ [Redacted] (58)

☐ [Redacted] (1)

☐ [Redacted] (1)

9. Last, you will customize your email content, starting with the **Email subject**. The **default subject** will be turned on. You can either add your custom message in addition to the default or remove the default entirely and use only your customized message. To turn off the default subject line, simply flip the toggle. To add a custom subject, type the subject into the field. You can preview the **email subject line** on the right side of the screen.

Note: If the subject line is too long, some email providers may truncate it or display it incorrectly.

1 Category

2 Details

3 Locations

4 Edit template

Customize your email content.

Email subject ⓘ

Add subject here

☒ Include default subject

Text area 1 (optional) 0/255

Add text here

☒ Include default welcome message

Text area 2 (optional) 0/255

Add text here

Back Save

Configuration - 08/06/2025

Email subject:

DTIQ SmartAudit™ for [redacted] on 08/06/2025;
Score: 90%

Email body:

SMART AUDIT™

Text area 1

Welcome,
Please find the attached DTIQ SmartAudit™ generated by Auditor that was completed at [redacted].

📊 Score: 90% (90/100)

🕒 Speed of Services:

- Drive-Thru - 01:36
- Counter - 12:34

Click the button below to view:

[Open report](#)

The location was non-compliant in the following areas

- Are purchased items accurately rung into the Point of Sale?

10. Edit the optional **Text areas**. **Text area 1** will appear above the body of the email, and **Text area 2** will appear below the body. As with the **Email subject**, the default option will be toggled on. To edit these text areas, flip the toggle and enter your desired changes. You can preview these areas on the right side of the screen.

When you are satisfied with your changes, click **Save**.

1 Category

2 Details

3 Locations

4 Edit template

Customize your email content.

Email subject ⓘ

Add subject here

☒ Include default subject

Text area 1 (optional) 0/255

Add text here

☒ Include default welcome message

Text area 2 (optional) 0/255

Add text here

Back **Save**

Configuration - 08/06/2025

Email subject:

DTIQ SmartAudit™ for [redacted] on 08/06/2025;
Score: 90%

Email body:

SMART AUDIT™

Text area 1

Welcome,
Please find the attached DTIQ SmartAudit™ generated by Auditor that was completed at [redacted].

📊 Score: 90% (90/100)

🕒 Speed of Services:

- Drive-Thru - 01:36
- Counter - 12:34

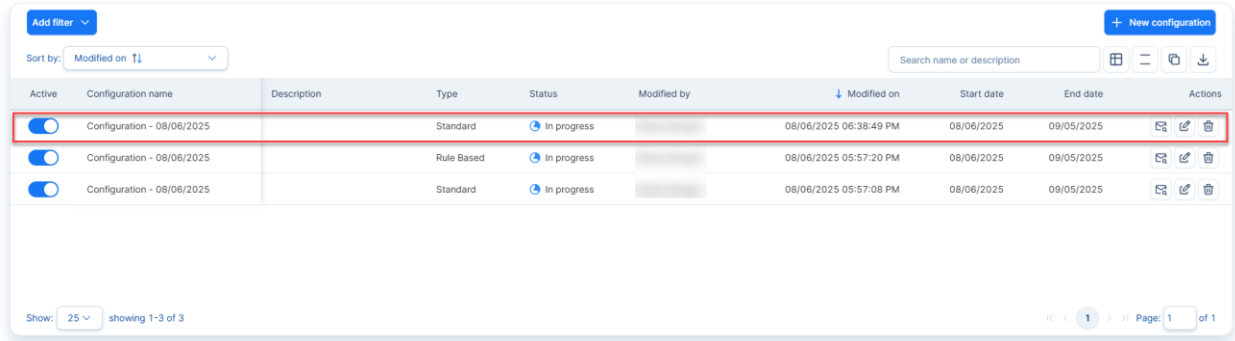
Click the button below to view:

[Open report](#)

The location was non-compliant in the following areas

- Are purchased items accurately rung into the Point of Sale?

11. You will be redirected back to the **SmartAudit™ Email Customization** dashboard, where you should see your new configuration at the top of the list.



Active	Configuration name	Description	Type	Status	Modified by	Modified on	Start date	End date	Actions
☒	Configuration - 08/06/2025		Standard	In progress		08/06/2025 06:38:49 PM	08/06/2025	09/05/2025	
☒	Configuration - 08/06/2025		Rule Based	In progress		08/06/2025 05:57:20 PM	08/06/2025	09/05/2025	
☒	Configuration - 08/06/2025		Standard	In progress		08/06/2025 05:57:08 PM	08/06/2025	09/05/2025	

Sort by: Modified on

Search name or description

Show: 25 showing 1-3 of 3

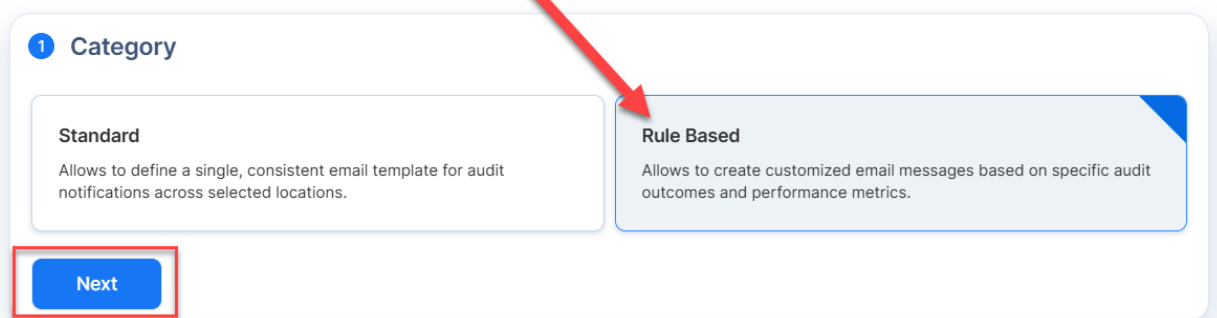
Page: 1 of 1

Configuring Rules-Based Email Customization

You can also use **SmartAudit™ Email Customization** to configure **rules-based customization** via the following steps:

1. Click the **+ New configuration** button. Make sure **Rule Based** is selected, then click **Next**. **Rule Based** configuration allows you to create customized email messages based on specific audit outcomes and performance metrics (e.g. audit score, speed of service, loss events, etc.).

New configuration



1 Category

Standard

Allows to define a single, consistent email template for audit notifications across selected locations.

Rule Based

Allows to create customized email messages based on specific audit outcomes and performance metrics.

Next

2. As in the previous section, define your email configuration settings. Choose your **start** and **end dates**, enter a **name** for the configuration, and add a description if desired. Then, click **Next**.

2

Details

Define email configuration settings.

Start

End

08/06/2025

09/05/2025

Name

Configuration - 08/06/2025

Description (optional)

Description

Back

Next

3. Select the **locations** for your configuration. Click the **dropdown arrow** to view all available locations or use the **search bar** to find a particular location.

3

Locations

Select locations for your configuration.

Search

☐

(146)

☐ ☐ ☐

☐

☐

(58)

☐ ☐ ☐

☐

☐

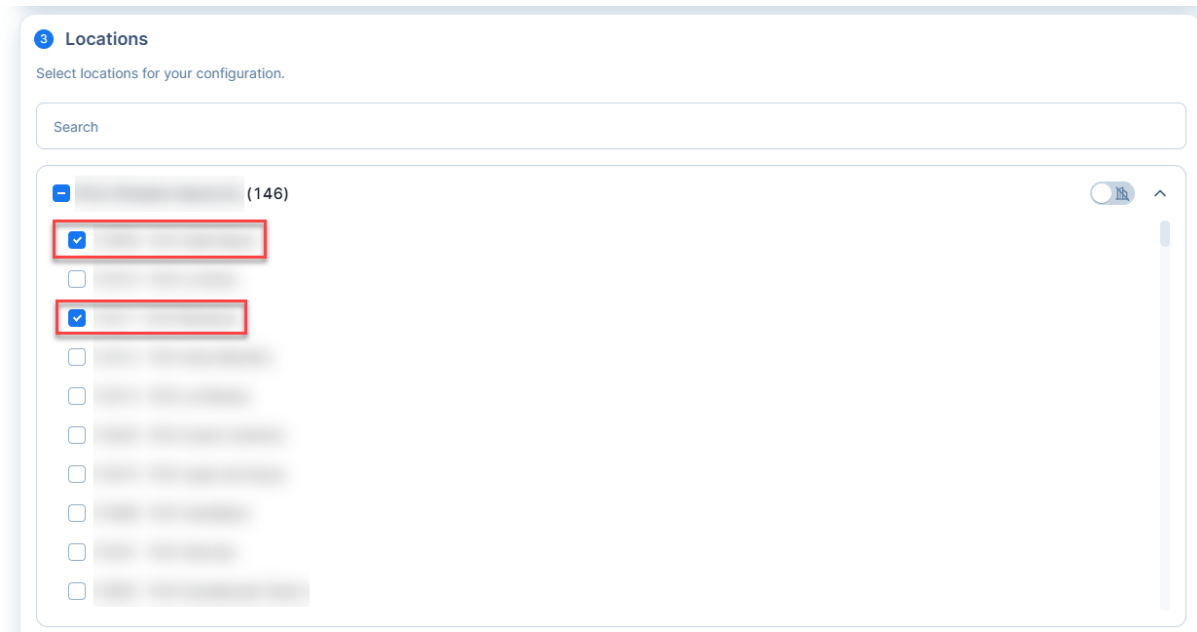
(1)

☐ ☐ ☐

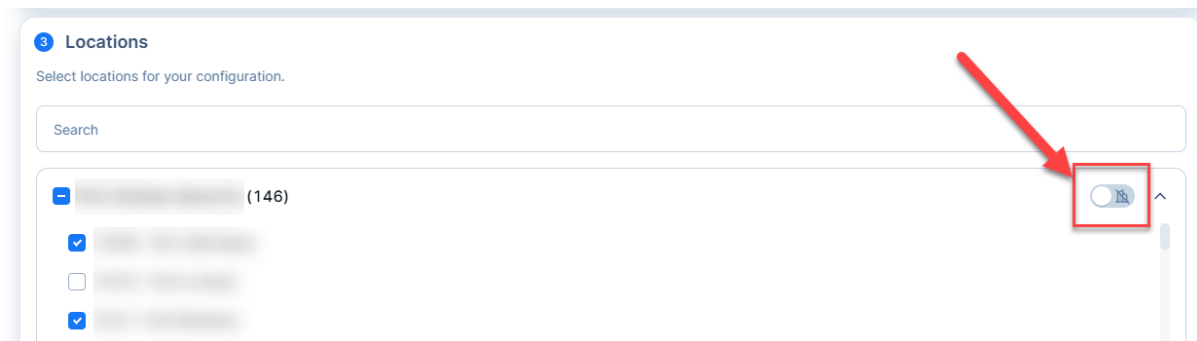
☐

Back

Next



You can also flip the **toggle** beside the **organization name** to select the whole organization and include any future locations added in the current configuration.



Once you have chosen your locations, click **Next** to continue.

4. Define the **Rules** by specifying audit outcomes and performance metrics for your configuration. For example, you could set a rule that if the audit score is below 80%, add an "improvement needed" message.

To add another condition within a rule, click **+ Add next**. The email will not trigger unless both conditions are met.

To add another rule (an "or" condition), click the **+ Add rule** button.

Once you are satisfied with your changes, click **Next**.

4 Rules

Specify audit outcomes and performance metrics for your configuration.

Rule 1

Audit score ▾

...

Less than ▾

80% − +

🗑️

+ Add next

☐ Apply if in

Value − +

 Consecutive audits

+ Add rule

Back

Next

5. Last, edit the **template**. At the top, you should see the criteria you selected in the previous step. If you have set up multiple rules, you can specify a different custom message for each one by selecting *Rule 1*, *Rule 2*, etc., during Step 5 of the configuration. The default subject will be turned on. You can either add your custom message in addition to the default or remove the default entirely and use only your customized message. To turn off the default subject line, simply flip the toggle. To add a custom subject, type the subject into the field. You can preview the email subject line on the right side of the screen. Tweak your **subject** and **text areas** as needed, then click **Save**.

5 Edit template

Customize your email content.

Rule 1

Audit score greater than 80%

Email subject ⓘ

Add subject here

☒ Include default subject

Text area 1 (optional) 0/255

Add text here

☒ Include default welcome message

Text area 2 (optional) 0/255

Add text here

Back

Save

6. You will be redirected back to the **SmartAudit™ Email Customization** dashboard, where you should see your new configuration at the top of the list.

SmartAudit™ Email Customization

Add filter Sort by: Modified on ↑↓ Search name or description + New configuration								
Active	Configuration name	Description	Type	Status	Modified by	Modified on	Start date	End date
☒	Configuration - 08/06/2025		Rule Based	In progress		08/06/2025 07:56:39 PM	08/06/2025	09/05/2025
☒	Configuration - 08/06/2025		Standard	In progress		08/06/2025 06:38:49 PM	08/06/2025	09/05/2025
☒	Configuration - 08/06/2025		Rule Based	In progress		08/06/2025 05:57:20 PM	08/06/2025	09/05/2025
☒	Configuration - 08/06/2025		Standard	In progress		08/06/2025 05:57:08 PM	08/06/2025	09/05/2025

For additional information or questions, please contact **Support** at support@dtiq.com or your **Customer Experience Team** at csr@dtiq.com.



800.933.8388 | info@dtiq.com | www.DTiQ.com

