MCL Dashboard – FAQ Guide

What is displayed in the MCL Dashboard and how do I navigate it?

The MCL dashboard provides an overview of all operational areas, including **checklists**, **questions**, **tasks**, **reports**, **users**, **roles**, **departments**, and **markets**.

How do I navigate the dashboard?

Navigation is done from the **side menu**, allowing you to switch between modules and monitor key performance indicators such as completed checklists or assigned tasks.

How do I create or edit a market in the dashboard?

To manage markets: - Go to the **Markets** section on the dashboard. - Click on the **+** icon to create a new market, or click on the **Pencil Icon** to edit an existing market. - Assign departments to each market to ensure accurate data organization and transparency.

How do I add or edit departments in the dashboard?

- Go to the **Departments** section to create or modify entries.
- Click on the **+** icon to add new departments.
- Define department names and link them to markets as needed.
- Departments form the basis for assigning questions and checklists.

How do I create a new user in the system in the dashboard?

To add users: - Open the **Users** tab and click **+** to create a new profile.

In the dashboard, how do I manage a user in the system?

- Assign credentials, a market, and a role.
- Save the changes and check the permissions under **Roles**.

How do I assign roles and permissions to users in the dashboard?

- Roles are configured under the **Roles** menu.
- Select a role or create a role (e.g., Manager, Admin).
- Customize permissions for each role, such as editing, viewing, or managing tasks, checklists, and reports.
- Assign roles to users in their profile settings.

How do I create questions by department in the dashboard?

Under **Questions**, you can create, edit, or filter questions. - Export questions to Excel for review if needed.

How do I filter questions by department in the dashboard?

- Use department filters or keyword search to find items.
- Each question must be linked to a department to appear in relevant checklists.

How do I create and edit checklists in the dashboard?

- Open the **Checklists** section.
- Click **+** to create a new checklist or click the **Pencil Icon** to change one.
- Link checklists to specific departments and markets.
- Add repeat, role, and visibility settings before saving.

How do I analyze checklist or question data in the dashboard?

Use the **Data Analysis** section. - Filter results by company, market, or time period. - Review key metrics such as completion rates and response distributions. - Identify trends to improve performance and compliance.

How do I view assigned tasks in the dashboard?

Open the **Tasks** module to view assigned items. - Click on a task to view details, add notes, or upload photos.

How do I close assigned tasks in the dashboard?

- Use the **Close Task** option if the issue is resolved.
- Tasks can be assigned to users or markets to improve accountability.

How do I create a new task or announcement (newsletter) in the dashboard?

From the dashboard, select **Newsletters** or **Announcements**. - Enter the title and message details. - Attach optional photos or PDFs. - Ensure the sender is configured as a market contact to publish successfully.

How do I assign reports to specific roles and recipients in the dashboard?

In the **Assign Report Roles** section: - Select a report and assign it to roles such as **Manager** or **Admin**. - Add up to three email addresses for automatic delivery. - Save the settings for future reports.

How do I navigate between checklist and task analysis in the dashboard?

Use the top navigation bar to switch between **Checklists** and **Tasks**. - Adjust the time period with filters such as **This Week**, **Last Week**, **Today**, or **Yesterday**.

Which dashboard charts are interactive?

Charts such as **Checklist Not Completed**, **Recurring Checklist Status**, and **Tasks by Status** are interactive. Clicking a bar or segment opens a detailed list of corresponding elements.

How do market and department assignments affect the visibility of checklists?

A checklist appears only in stores where both the department and checklist settings match the assigned markets. - If departments aren't linked correctly, users won't see the checklist.

What are the rules for creating, archiving, copying, and exporting checklists in the dashboard?

From the **Checklists** menu, you can create, edit, delete, export, archive, or copy lists. - Archived checklists can only be reactivated by the MCL team. - Copied checklists will appear as "Copy" until renamed. - Checklists can be exported as Excel files.

How do I search, filter, and download checklist reports as PDFs?

Open the **Reports** pane, use the search bar or filters to find a specific checklist, and download reports directly as a PDF.

Where can I find monthly Excel exports for company-wide data in the dashboard?

Monthly Excel exports are available under **Exports & Company-wide Data**. They include checklist and task statuses, responses, and comments across all markets.

How do I analyze specific questions or answers in the dashboard?

Go to **Data Analysis**. - Filter by market, checklist, and time period. - View question-level answers and export related PDF reports.

Who can edit or delete tasks in the dashboard and under what conditions?

Only the task creator or a **Company Administrator** can edit a task if its status is **Not Started**. Completed or in-progress tasks cannot be edited but can be deleted individually or in bulk.

How do I delete tasks in bulk in the dashboard?

In the **Tasks** section, use the checkbox selection tool to select multiple tasks, then click **Delete Tasks**.

When I create a task in the dashboard, how do I set photo or comment requirements?

During task creation, enable options that require a photo or comment before completion. This ensures additional context before closing a task.

How do I assign reports to specific roles in the dashboard?

In the **Checklist Edit View**, open **Report Distribution**. - Enable the role setting ("Yes"). - Select desired markets, departments, or users. - Save the configuration for future checklists.

How do I create checklist groups in the dashboard and assign checklists to them?

Under **Company → Groups**, create groups and subgroups. - In the **Checklist Editor**, assign checklists under the **Group** field for easier filtering and navigation.

How can I include a new checklist in current dashboard analyses?

Enable **Include in Current Period** when creating the checklist. This ensures it appears immediately in dashboard data.

What can the MCL Dashboard do?

The MCL dashboard provides a centralized view of all checklists, tasks, and reports in stores. It allows managers to track performance, close rates, and compliance metrics in real time.

What are the main functional areas of the MCL Dashboard?

- **Checklists**: Displays active, completed, and overdue checklists.
- **Tasks**: Shows task assignments, due dates, and progress.
- **Reports**: Access completed checklist data and KPIs.
- **Data Analysis**: Offers insights into trends and compliance.

- **Circulars**: Displays company announcements.

How do I filter data by company, market, or time period in the dashboard?

At the top of the dashboard, use **Company**, **Market**, and **Date Range** filters to refine displayed data.

What color indicators are used in the dashboard charts?

- **Green**: Completed items.
- **Yellow**: In progress or partially completed.
- **Red**: Overdue or incomplete.
- **Gray**: Not started.

What information is displayed in the checklist overview?

- Total checklists created and completed.
- Completion rates by department or market.
- Percentage of overdue or uncompleted checklists.
- Recurring checklist cycles (daily, weekly, monthly).

How can I view checklist trends by department or market?

Select a department or market from the drop-down menu or filters. - Charts update automatically to show checklist performance and close rates.

What are recurring checklists and how are they tracked?

Recurring checklists are scheduled daily, weekly, or monthly. - Progress is shown in the **Status** section, highlighting due dates, completions, and open cycles.

What do you see in the Task Overview section of the dashboard?

- Total open and completed tasks.
- Distribution by priority and due date.
- Automatic follow-ups triggered by negative checklist responses.

How do I analyze response quality and compliance trends in the dashboard?

- The analytics engine visualizes positive vs. negative responses, frequency of **N/A**, and photo/comment counts.
- This helps identify areas for improvement.

What does the Reports section of the dashboard include?

- All completed checklist submissions.
- Export as PDF or Excel.
- View summaries by department.
- Filter by user, date, or checklist type.
- Access archived reports.

How can I interpret the KPI fields on the dashboard?

- **Completed Checklists**: Total completed within timeframe.
- **Unfilled Checklists**: Open or overdue.
- **Active Tasks**: Tasks currently in progress.
- **Reports Submitted**: Completed reports count.

What do you see in the Charts pane at the bottom of the dashboard?

- Checklist completion trends.
- Department performance comparisons.
- Task aging analysis.
- Click chart elements for detailed lists.

How do I export dashboard data for further reporting?

Export checklist, task, and report data to **Excel** or **PDF**.

Who can access and customize the dashboard?

- **Administrators**: Full access and customization.
- **Store Managers**: Access to assigned regions.
- **Team Members**: Limited to their department data.

How often is dashboard data updated?

Data updates automatically when a checklist is completed or a task changes. - Users can also click **Sync Now** to refresh manually.

Can you customize dashboard views?

Yes. You can customize filters and rearrange chart fields.

How do you save the layout in the dashboard?

Dashboard layout can be saved for future sessions.

How do announcements appear on the dashboard?

Circulars appear as banner notifications on the home screen with operational updates.

Where can I find company-wide summaries or exports?

Under **Exports & Company Reports**, view cumulative market data including checklist stats, task progress, and photo documentation.

Having trouble with missing dashboard data?

If data appears incomplete: - Verify filters (company, market, date). - Click **Sync Now**. - Ensure your role permissions are correct. - Contact **MCL Support** if the issue persists.

Who can I contact if I need help with dashboard configuration?

For technical questions or configuration support, contact **MCL Support** at **support@x2-solutions.de**.

What is the batch upload feature in the dashboard?

The batch upload feature allows administrators to upload multiple markets and users at once using Excel templates.

How do I upload multiple markets at once in the dashboard?

- Download the Excel template from the MCL web interface.
- Fill in mandatory fields marked in red.
- Upload via **Market Upload** option.
- Assign departments and review configurations.

How do I upload multiple users at once in the dashboard?

- Use the Excel template for user upload.
- Fill in required fields (names, emails, roles).
- Upload and link users to departments and markets.
- Copy-pasting data will cause upload errors.

Which fields are required in upload templates?

Mandatory fields are highlighted in red. Ensure they are completed to avoid upload errors.

What happens if there are errors while uploading?

Errors will appear in the **Error Window**. Review, correct in Excel, and re-upload.

Can I upload users before markets in the dashboard?

No. Markets must be uploaded first to allow proper user linking.

What are the steps after uploading?

After upload, administrators must: - Review configurations. - Validate department assignments. - Ensure entries are active and visible.

Who can use the batch upload feature in the dashboard?

Only **Enterprise Administrators** have permission to perform batch uploads.

How can I check if uploaded data is active in the dashboard?

Check the **Markets** or **Users** overview. New entries appear immediately after validation.

What is the purpose of the tag function in the dashboard?

Tags categorize markets and checklists for easier grouping and filtering in dashboards and reports.

How do I create and configure tags in the dashboard?

- Navigate to **Markets → Tags**.
- Click **+** to create new categories and tags.
- Save changes for filtering.

What are tag categories in the dashboard and how are they used?

Tag categories organize tags structurally but cannot be used directly for filtering.

How do I assign tags to markets in the dashboard?

Open **Markets**, select a market, and go to **Tags Tab**. - Use checkboxes to assign tags.

Can tags be used to filter dashboard data?

Yes. Tags can filter checklists and tasks to enhance visibility and analytics.

Do tags affect KPI calculations in the dashboard?

No. Tags only filter data views and do not influence KPI results.

Who can create or edit tags in the dashboard?

Only **Administrators** can create or edit tags. Regular users can apply existing tag filters.

Can tags be used in dashboard reports or exports?

Yes. Tags can be applied before export to include only relevant market data.

How can I track recurring checklist status in the dashboard?

Use **Recurring Checklist Status** to monitor due dates and completions for daily or scheduled checklists.

What KPIs does the dashboard cover?

- **Completed Checklists** and **Assigned Tasks** KPIs include all checklists.
- **Checklists Not Complete** only shows recurring data.

Are dashboard charts interactive?

Yes. Charts under **Checklists by Status** and **Tasks by Status** are interactive. Clicking bars opens detailed lists.

How do I edit a task in the dashboard after it's created?

- Open a task marked as **Not Started** and select **Edit**.
- Update title, description, and attachments.

Who can edit tasks in the dashboard?

Only the original creator or **Company Admin** can edit tasks.

Why is my checklist not active in the right time period?

Check **Start/End Dates and Times**. - Use **N/A (Not Applicable)** only for always-available checklists.

How is market visibility determined for users in the dashboard?

Visibility depends on assigned roles and connections. Users see only linked stores.

Can users access multiple stores in the dashboard?

Yes, if their roles and permissions include those markets.

What is the impact of department selection when creating checklists?

Department selection determines which areas are covered by the checklist and which departments participate in each cycle.

When is it mandatory to add a photo or comment?

Photos and comments become mandatory if a negative or unusual response is recorded to provide context for reviewers.

Where do I see my checklists in the dashboard?

Select the **Checklists** tab from the main menu to edit, delete, copy, export, or archive checklists.

How do I create a new checklist in the dashboard?

- Click the **+** icon in **Checklists**.
- Enter a checklist name (required).
- Set start/end dates and times.
- Choose a recurrence (daily, weekly, etc.).
- Select **N.A. (Not Applicable)** to make it always available.
- Set signature and department options.

What does “Start scoring the checklist within the current time period” mean?

This option includes a recurring checklist in dashboard charts immediately if completed during the current period, even before the next cycle begins.

What can I set when creating checklists in the dashboard?

- General info: name, rhythm, signature requirement.
- Roles for checklist visibility.
- Departments and questions.
- Report recipients and checklist groups.

How do I edit, delete, or export checklists in the dashboard?

- **Edit**: Use the **Pencil Icon**.
- **Delete**: Use the **Trash Icon**.
- **Export**: Use the **Excel Icon** to download.

Which fields are mandatory when creating a checklist?

Name and rhythm fields are mandatory. Each checklist must include at least one role, department, and question.

How can I make a checklist always available?

Select **N.A. (Not Applicable)** under **Recurring** in **General**.

How do I configure checklist recurrence in the dashboard?

In **General → Recurring**, choose from: **N.A.**, **Daily**, **Weekly**, **Monthly**, **Quarterly**, **Semi-annually**, or **Annually**.

How can I allow free department selection for checklists?

In **General**, enable **Department Selection**. This lets users decide which departments to include when completing the checklist.

How do I assign a role to a checklist in the dashboard?

In **Roles**, assign who has access. Roles include **Company Admin**, **Market**, **District**, or **Department Management**.

How does department selection affect markets?

Departments determine checklist visibility across stores. Unselected departments mean linked stores won't see the checklist.

Can I change department order in the dashboard?

No. Department order can only be adjusted in the MCL App via drag-and-drop before starting the checklist.

Where do I determine who receives checklist reports by email?

In **E-Mail Settings** during checklist creation: - Enter up to three email addresses, separated by commas. - Assign roles that should automatically receive reports. - To enable, change "No" to "Yes" under **Assigned**.

What happens if I don't select a department or role?

Users will not see or may only partially access