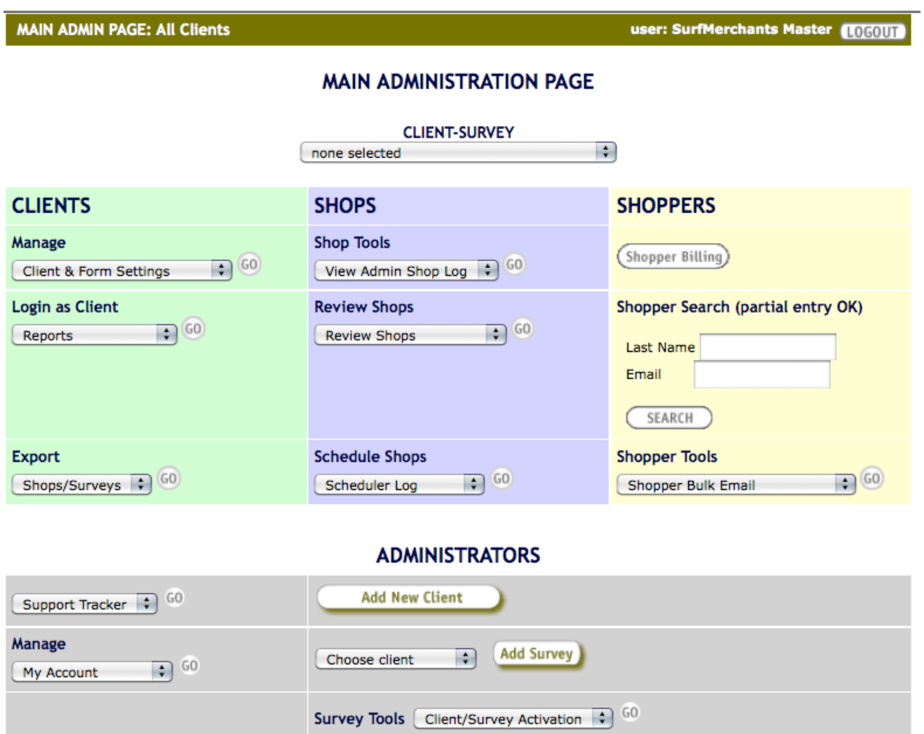
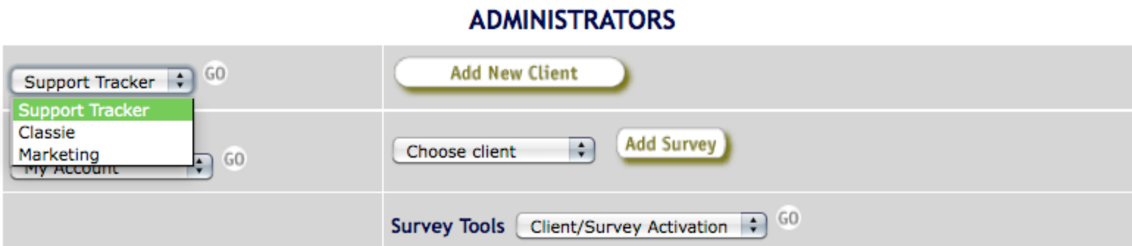
Log in via the Admin Login button:

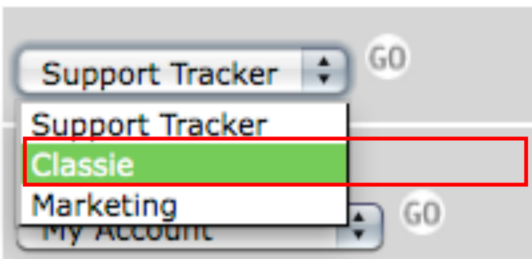
This will take you to the main Admin page of SASSIE.



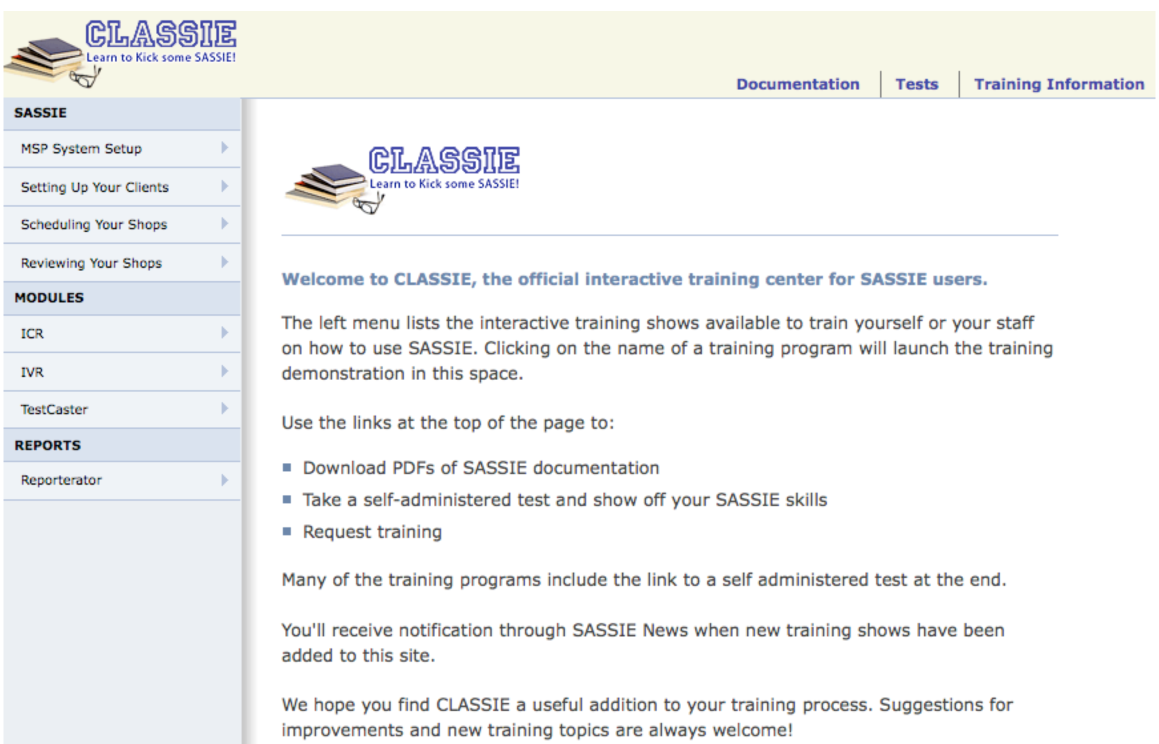
From here, there are some additional resources available to you, in the grey administrators section at the bottom of the screen:



The first area that you should access is the area labeled Classie. To access it, select it from the Support Tracker dropdown menu and hit GO:

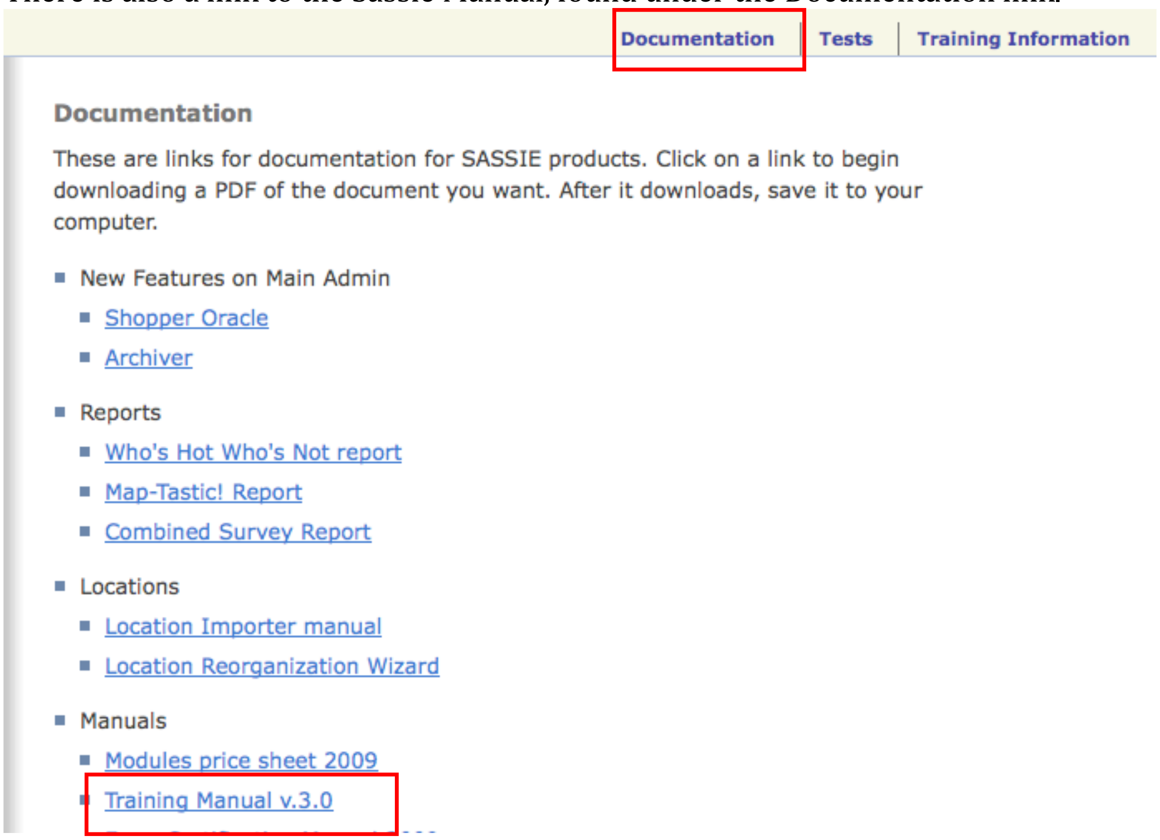


Classie is the online, interactive Sassie training portal. From here, you can watch a number of interactive videos that explain Sassie functionality:



We encourage you to watch all of the Classie training shows to familiarize yourself with various aspects of the Sassie environment. During the Quickstart overview guide, you will be directed to watch certain shows to better understand different Sassie tools.

There is also a link to the Sassie Manual, found under the Documentation link.

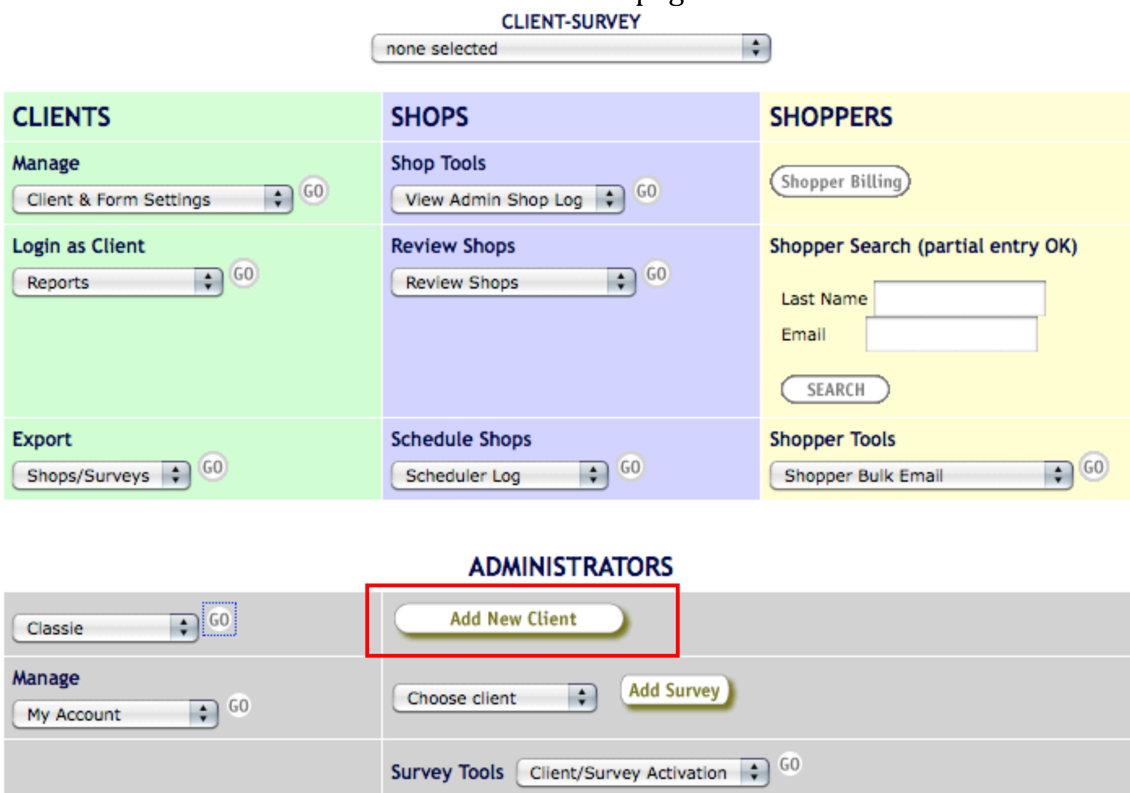


During the Quickstart overview, you will be directed to certain pages of the manual to better understand the ways that different settings affect certain screens in Sassie.

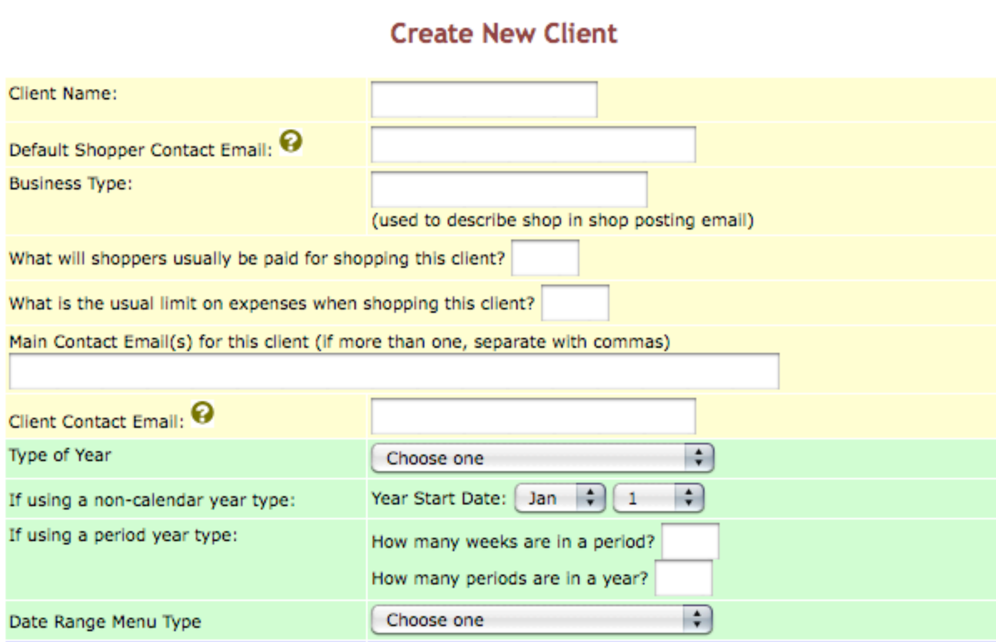
Once you have reviewed the Classie shows and have downloaded the manual, you are ready to get started on creating your program in Sassie.

Adding a New Client

You can add a new client from the main admin page:



Once you select Add New Client, you will access a web form with Client specific settings:



There are 4 required fields on the Client settings form. All of the other settings can be set at a later point in time and can be updated at any point in time, so you can go ahead and create your client, filling in the 4 required fields and make decisions about the other settings later. Even the required fields can be changed at a later point in time.

The 4 required fields are:

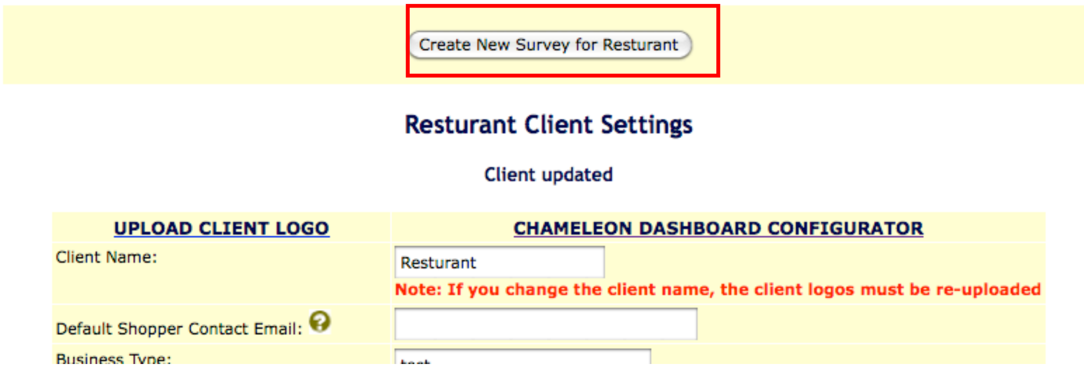
- Client name
- Business type (used in shop posting emails to shoppers and displayed on the job board)
- Type of Year
- Date Range menu type

Please refer to the manual, pages 16 through 27, for a detailed explanation on what each of the settings on the Client settings page controls.

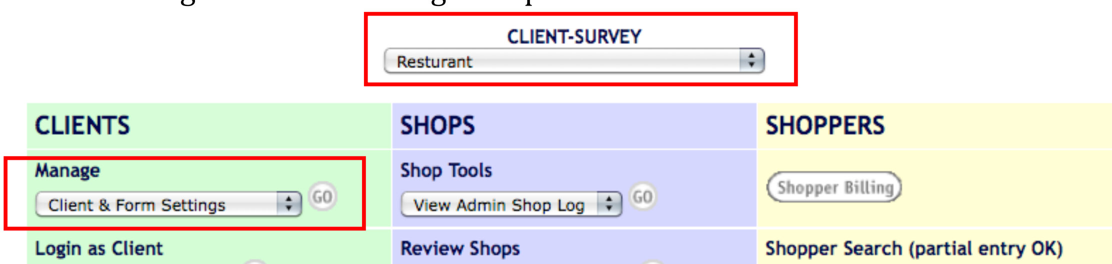
Once you have filled in your required fields, go to the bottom of the page and click the Add New button:

Adding a New Survey

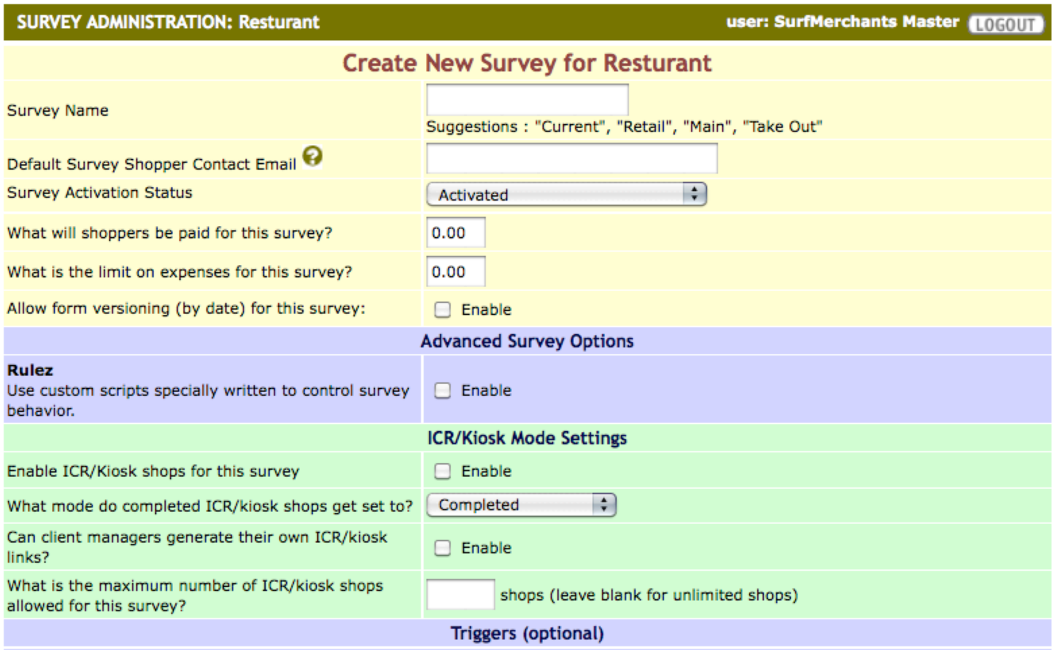
Once you have added a client (or selected a client from the main Admin page), click create a new survey to add a survey.



If you have exited the system and logged back in and are ready to create your survey, you can also access the client settings by selecting the client from the 'Client-Survey' dropdown at the top of the main admin page and then selecting 'Client & Form Settings' from the 'Manage' dropdown. Then click GO:



Selecting 'Create New Survey for Your Client' will bring you to another webform for survey-specific settings:

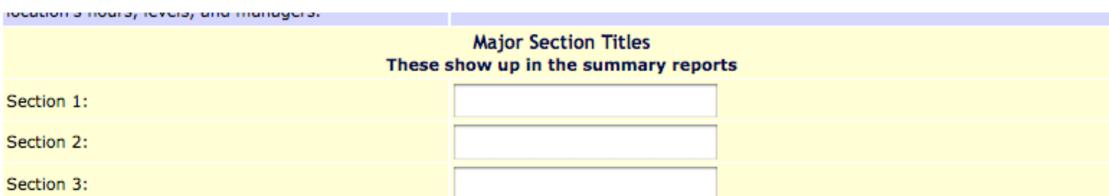

SURVEY ADMINISTRATION: Resturant — user: SurfMerchants Master LOGOUT

Create New Survey for Resturant

Survey Name	Suggestions : "Current", "Retail", "Main", "Take Out"
Default Survey Shopper Contact Email	
Survey Activation Status	Activated
What will shoppers be paid for this survey?	0.00
What is the limit on expenses for this survey?	0.00
Allow form versioning (by date) for this survey:	Enable
Advanced Survey Options	
Rulez Use custom scripts specially written to control survey behavior.	Enable
ICR/Kiosk Mode Settings	
Enable ICR/Kiosk shops for this survey	Enable
What mode do completed ICR/kiosk shops get set to?	Completed
Can client managers generate their own ICR/kiosk links?	Enable
What is the maximum number of ICR/kiosk shops allowed for this survey?	shops (leave blank for unlimited shops)
Triggers (optional)	

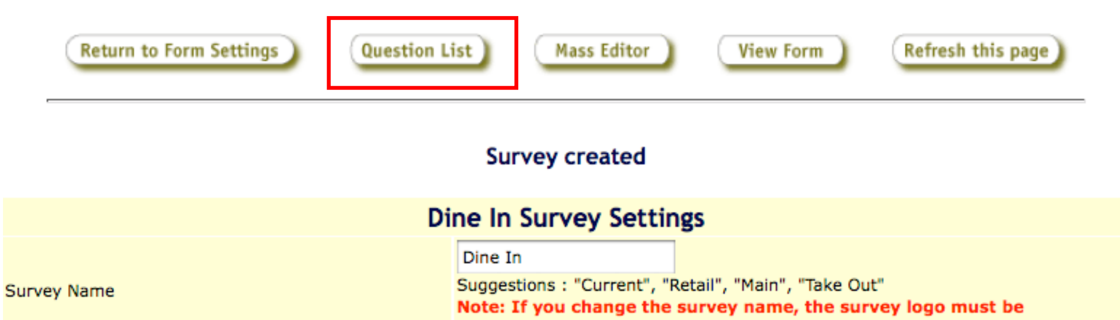
The only required field on this page is Survey Name, please refer to pages 47 through 52 for detailed explanations for all of the fields on the Survey Settings page.

For the purposes of the Quick start exercise, please create at least 2 major sections, the other fields can be updated later.


Major Section Titles
These show up in the summary reports

Section 1:	
Section 2:	
Section 3:	

Once you have added your Survey, you have a number of options for Survey management at the top of your page. We are going to start adding questions to the question list:


Return to Form Settings | Question List | Mass Editor | View Form | Refresh this page

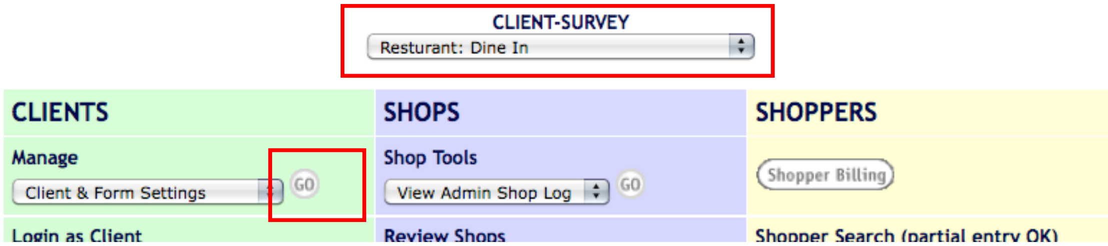
Survey created

Dine In Survey Settings

Survey Name	Dine In Suggestions : "Current", "Retail", "Main", "Take Out" Note: If you change the survey name, the survey logo must be

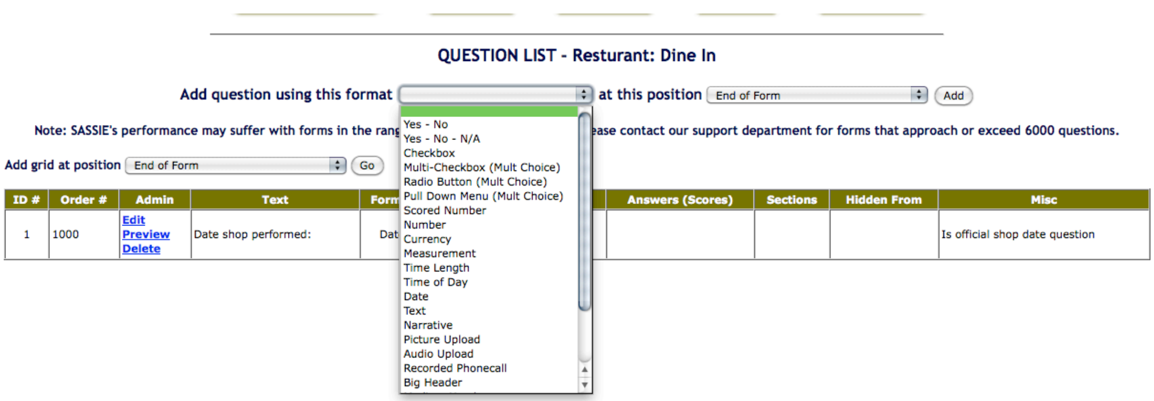
Question List

If you are accessing the Question List from the main admin page, pick your client and survey from the dropdown and click the Go button next to Client and Form Settings:



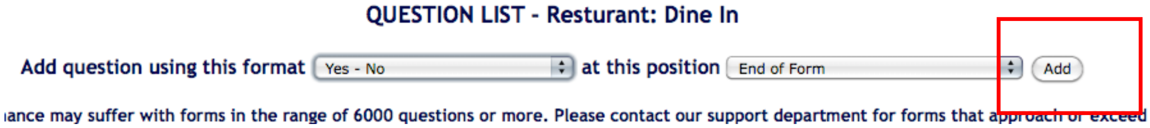
Then select Question List from the right hand dropdown and select the Go button:

The Question List designer allows you to add a number of different question types to your survey:

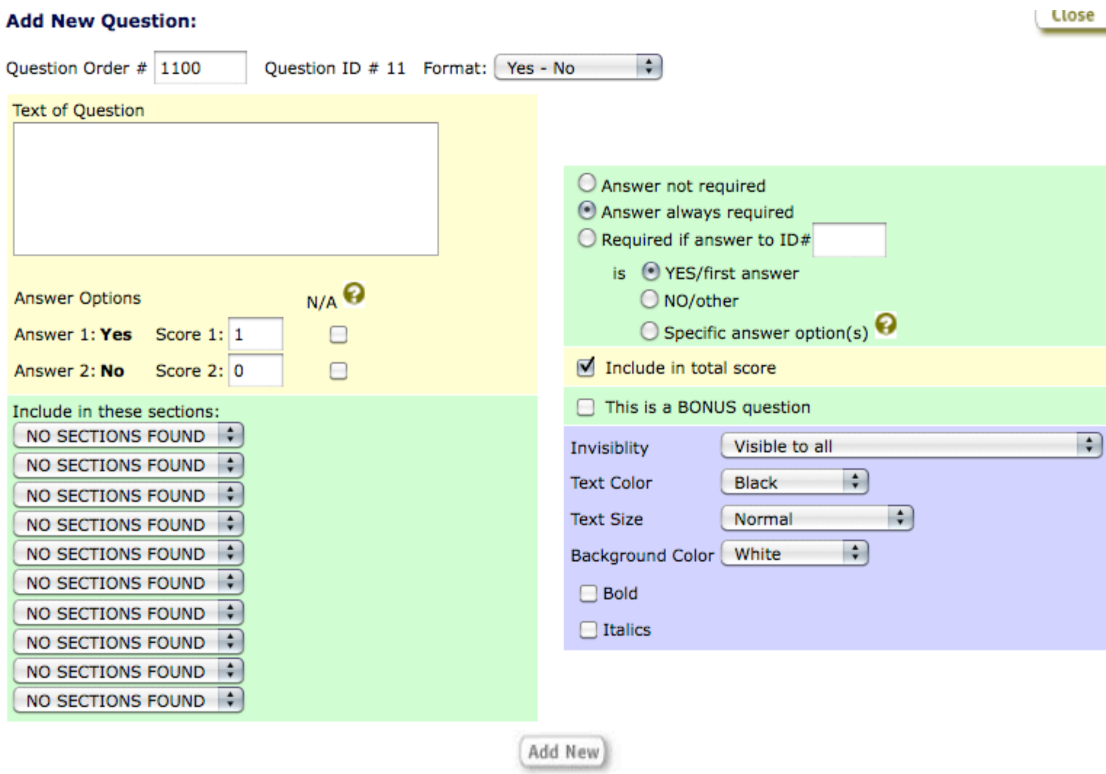


For a detailed explanation of each question type in the system, please refer to pages 67 through 71 in the manual.

Select a question type and select Add at the top of the Question List designer page:

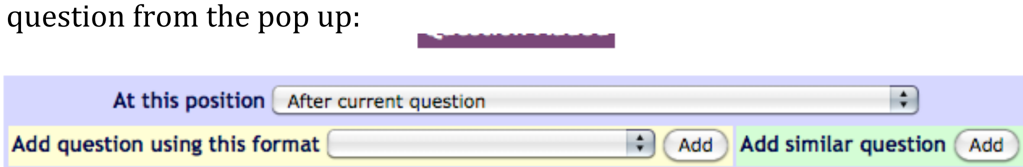


This opens a pop up where you can add the details of your question:



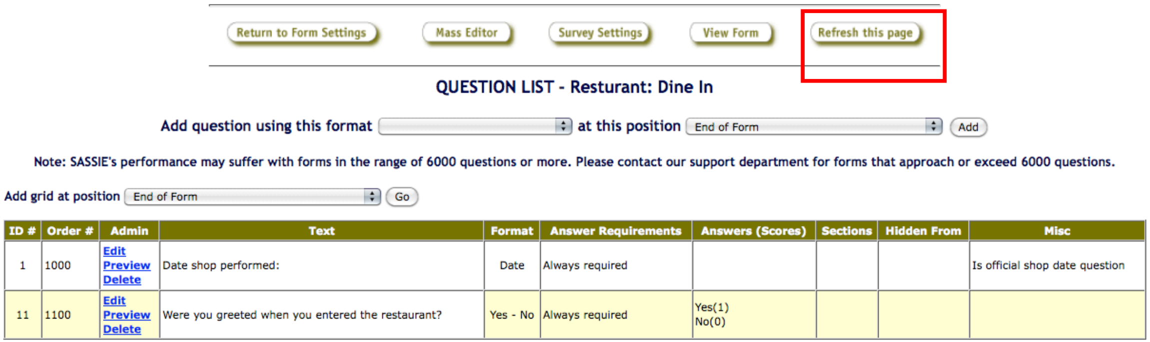
Please refer to pages 58 and 59 in your manual for more details on the fields on this page.

Once you have entered a question and saved it, you will have the option to add a new question from the pop up:



You can add a question right after the question you just added, insert a question into a different place on the form, add a similar question or add a new question using a different format.

Once you have added your questions, go back to the Question List designer page and click the button labeled Refresh to see all of your questions:



Return to Form Settings | Mass Editor | Survey Settings | View Form | Refresh this page

QUESTION LIST - Resturant: Dine In

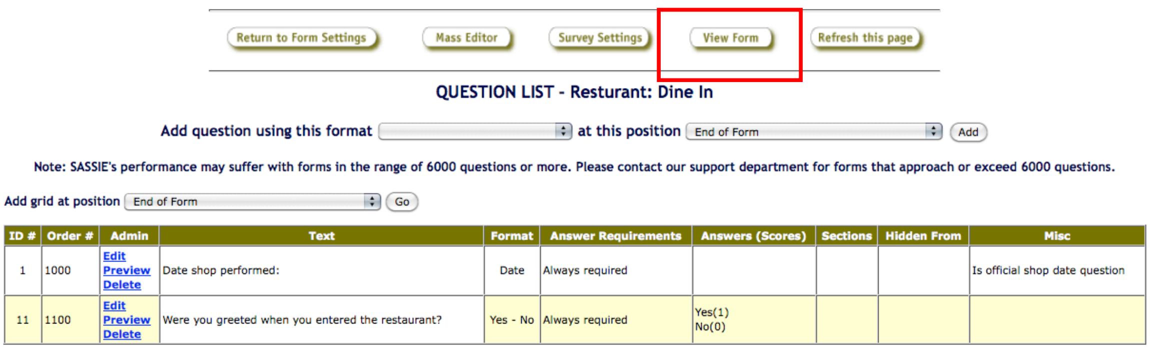
Add question using this format [ ] at this position [End of Form] Add

Note: SASSIE's performance may suffer with forms in the range of 6000 questions or more. Please contact our support department for forms that approach or exceed 6000 questions.

Add grid at position [End of Form] Go

ID #	Order #	Admin	Text	Format	Answer Requirements	Answers (Scores)	Sections	Hidden From	Misc
1	1000	Edit Preview Delete	Date shop performed:	Date	Always required				Is official shop date question
11	1100	Edit Preview Delete	Were you greeted when you entered the restaurant?	Yes - No	Always required	Yes(1) No(0)			

If you select View Form, it will show you the view that the shopper will see when they fill in the shop:



Return to Form Settings | Mass Editor | Survey Settings | View Form | Refresh this page

QUESTION LIST - Resturant: Dine In

Add question using this format [ ] at this position [End of Form] Add

Note: SASSIE's performance may suffer with forms in the range of 6000 questions or more. Please contact our support department for forms that approach or exceed 6000 questions.

Add grid at position [End of Form] Go

ID #	Order #	Admin	Text	Format	Answer Requirements	Answers (Scores)	Sections	Hidden From	Misc
1	1000	Edit Preview Delete	Date shop performed:	Date	Always required				Is official shop date question
11	1100	Edit Preview Delete	Were you greeted when you entered the restaurant?	Yes - No	Always required	Yes(1) No(0)			

Resturant: Dine In (#Demo)

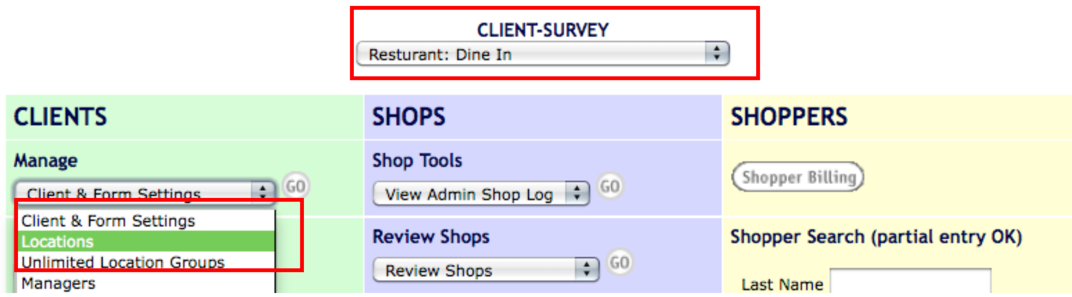
Shop Requirements	Location Info
This shop must be performed between Demo and Demo, on these days and times: Demo: Demo This shop must be submitted by Demo	Demo (ID# Demo) Demo Demo Demo, Demo, Demo Demo Demo
Shop Info Your Shop Fee: $Demo Approved Expenses: $Demo Special Expenses (Demo): $Demo Bonus Pay: $Demo Comments: Demo	**Shopper Info** Demo Demo (#Demo) Demo@Demo.com
Download	**View** Printer-friendly version of this form Time-saving tips and frequently asked questions

Question	Answer
Date shop performed	Mon / Day / Year
Were you greeted when you entered the restaurant?	○ Yes ○ No

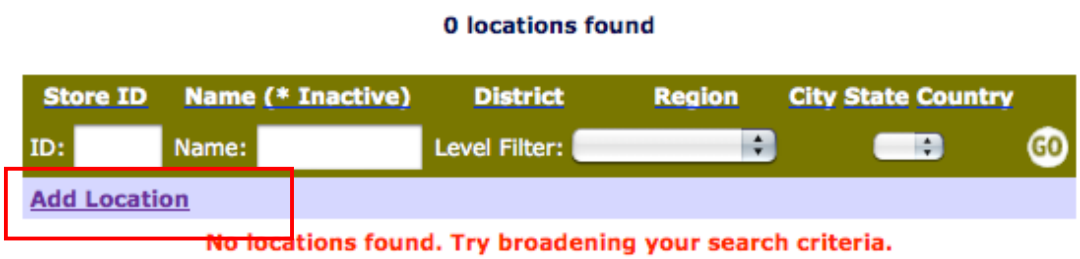
Adding a Location

You need to add at least one location in order to schedule a shop.

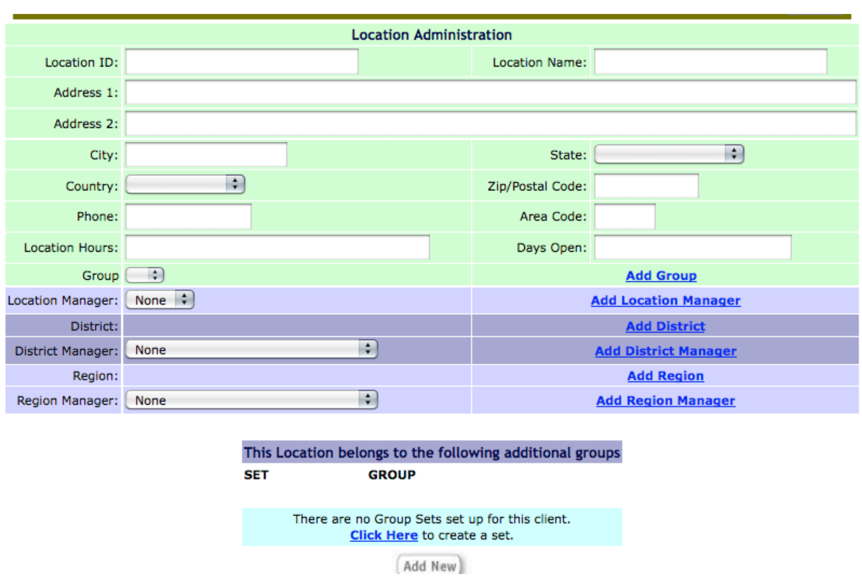
From the main admin page select your client and pick Locations from the Manage dropdown. Then click GO:



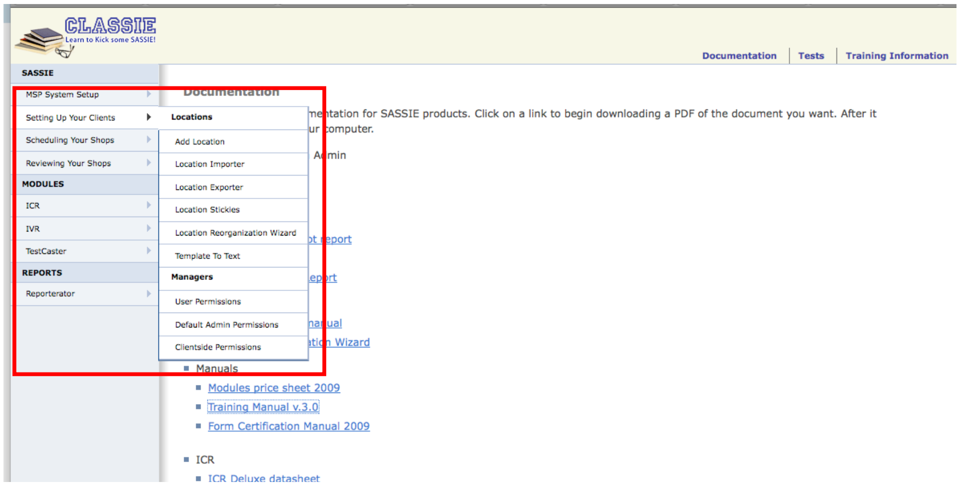
Next, click 'Add Location':



Enter your location information and click Add New at the bottom of the page:



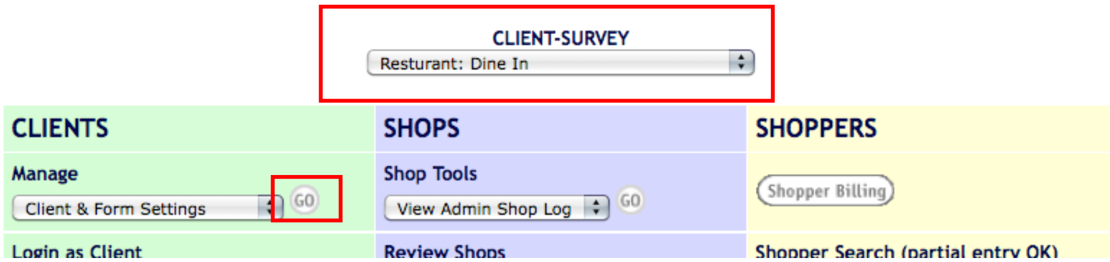
For more detailed explanation of each of the location fields and how to bulk add locations, please refer to pages 35 though 39 in the manual and the Location training shows in Classie.



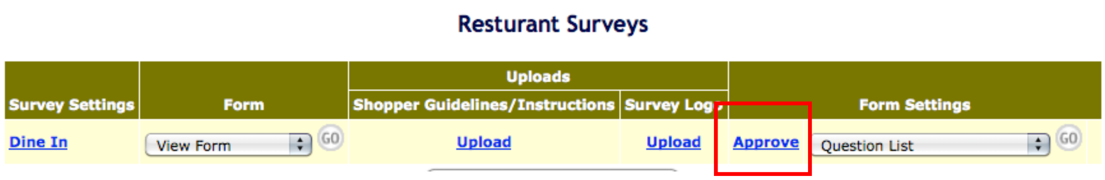
Approving your form

The last step before you are ready to assign this to a shopper is to approve your form.

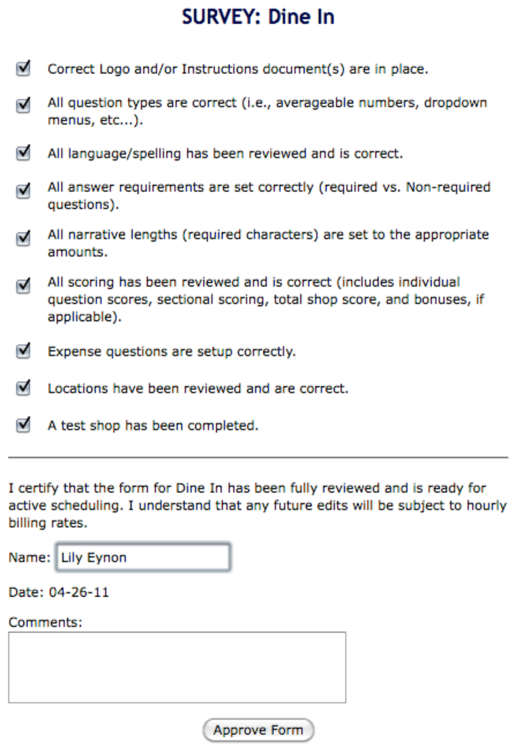
From the main admin screen, select your Client and Survey and then click the Go button next to Client and Form Settings:



From here, you are going to click on the Approve link next to the survey you want to approve:



Check off the checkboxes and click Approve Form



SURVEY: Dine In

- ☑ Correct Logo and/or Instructions document(s) are in place.
- ☑ All question types are correct (i.e., averageable numbers, dropdown menus, etc...).
- ☑ All language/spelling has been reviewed and is correct.
- ☑ All answer requirements are set correctly (required vs. Non-required questions).
- ☑ All narrative lengths (required characters) are set to the appropriate amounts.
- ☑ All scoring has been reviewed and is correct (includes individual question scores, sectional scoring, total shop score, and bonuses, if applicable).
- ☑ Expense questions are setup correctly.
- ☑ Locations have been reviewed and are correct.
- ☑ A test shop has been completed.

I certify that the form for Dine In has been fully reviewed and is ready for active scheduling. I understand that any future edits will be subject to hourly billing rates.

Name: Lily Eynon

Date: 04-26-11

Comments:

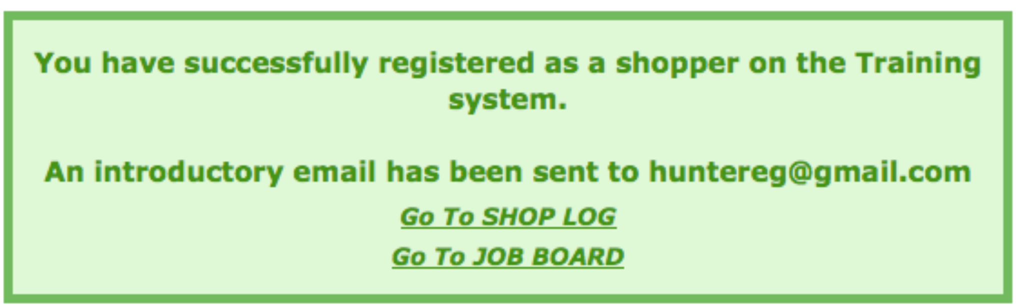
Approve Form

Signing up as a shopper

In order to assign shops, we need shoppers in the system. You will need to log out as an administrator and go back to the main sign-in page and complete New Shopper Signup.

The shopper profile for our demo system has been set to the default demographics profile. These can be customized for individual systems.

Follow the sign up pages through until you receive confirmation that you have added a new shopper:

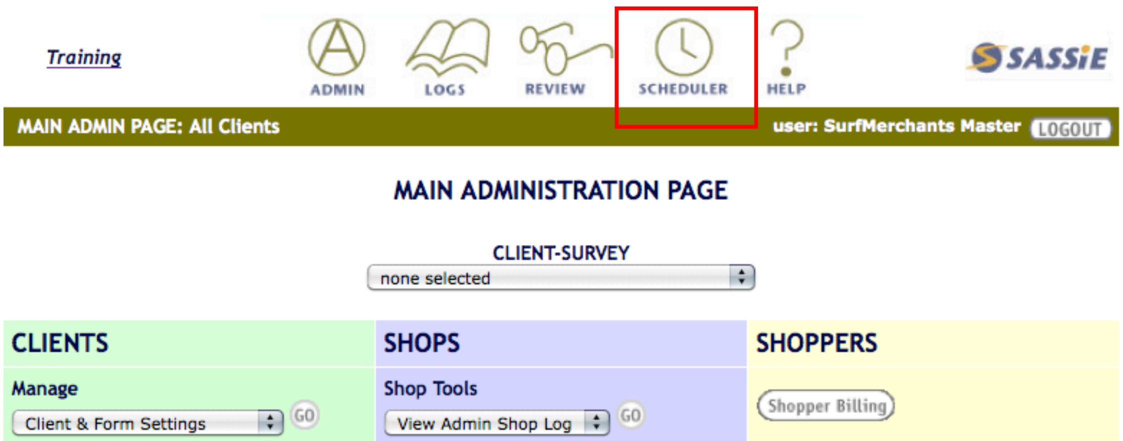


Scheduling a shop

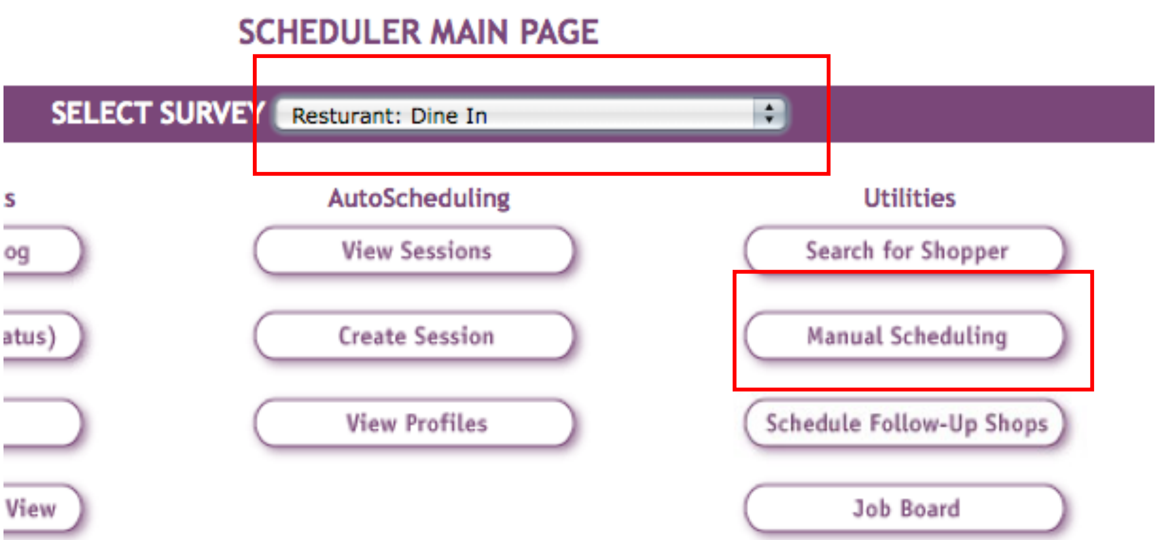
The most basic method of scheduling a shop is Manual Scheduling. This is where you know the location and you know what shopper is going to complete the assignment.

In order to schedule, you will need to log back in as an administrator and assign a shop for the location that you created to the shopper that you have just created.

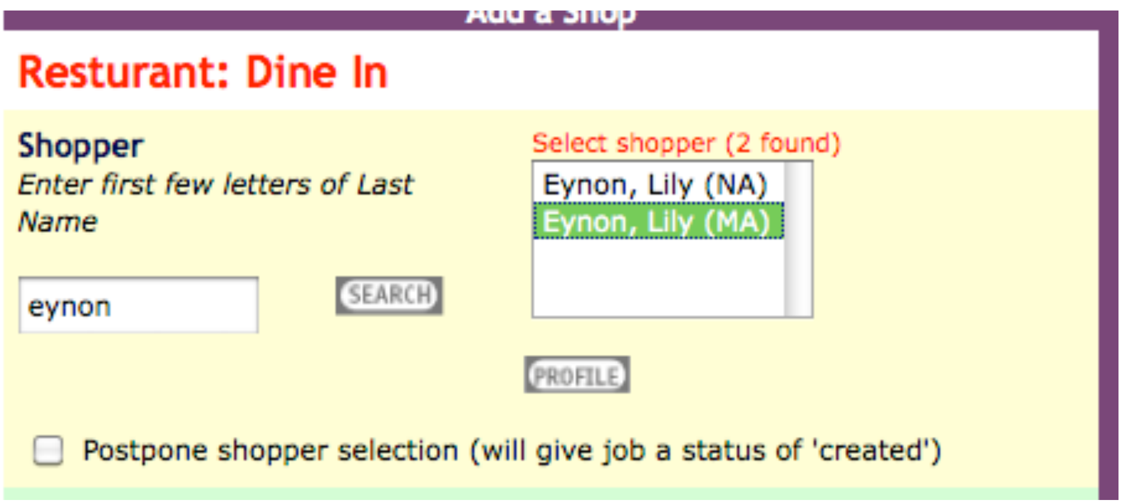
From the main admin screen, select the Scheduler icon in the nav bar:



From here, select your client and survey then select Manual Scheduling:



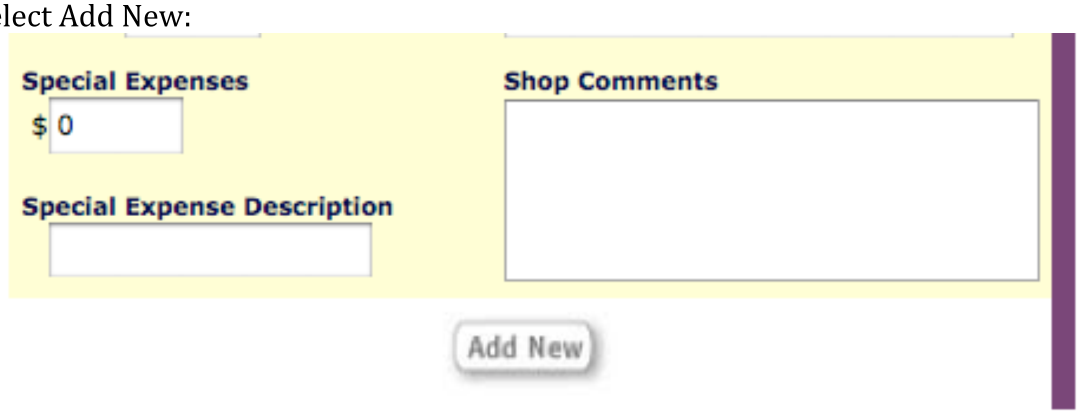
From here, search for your shopper; be sure to highlight the shopper's name in the Select Shopper box:



Then search for your location:

You must assign a due date to you shop, the other dates are optional. For more detail on the fields on this screen, please see page 81 in the manual.

Select Add New:



Your shop will now appear in the right hand column:

Last 50 Mystery Shopping shops

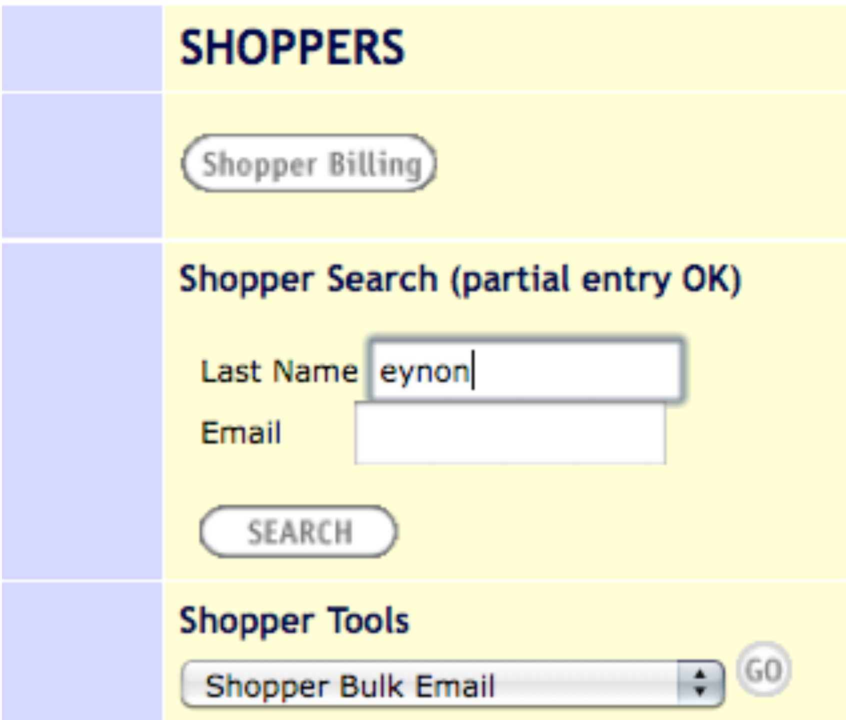
{REFRESH}

58512 #01: Boston (Eynon, 05/05/11)
58438 #BRM-12.12.2006: Location 251 (Eynon, 11/01/09)
58388 #MA11: Attleboro (Eynon, 08/31/08)
58387 #Boston: Boston (felos, 08/31/08)

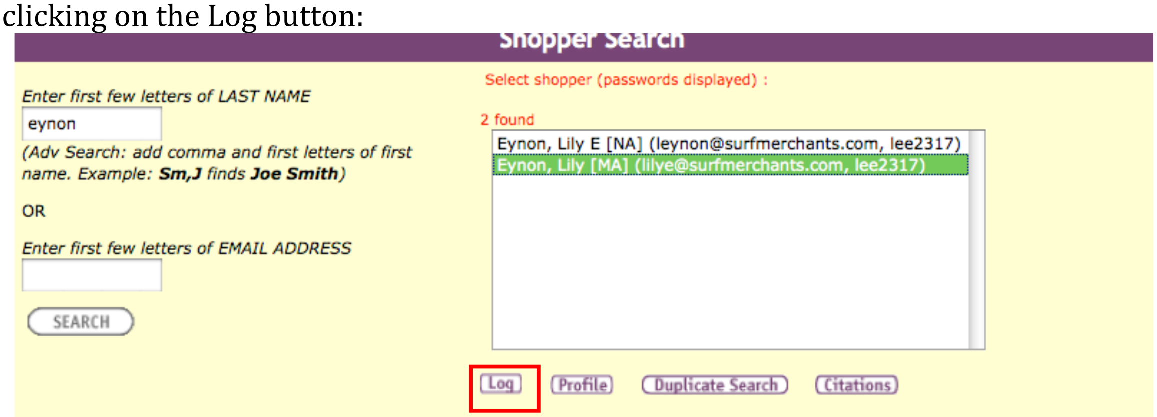
Filling in your shop as the shopper

After you have assigned the shop to the shopper, the shop will be available in his/her shop log to complete.

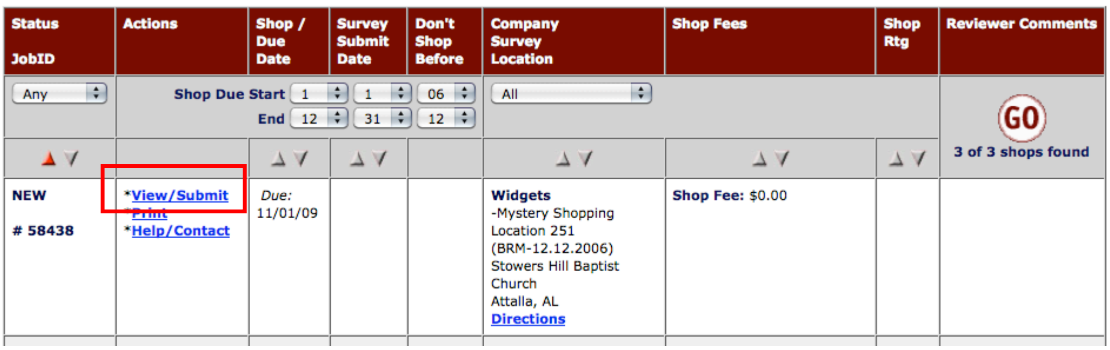
You can log in as an existing shopper from the main admin page and access his/her shop log. On the main Admin page, in the yellow SHOPPERS section, search for your shopper by last name or email address:



From here, you can access the shopper's shop log by selecting your shopper and clicking on the Log button:

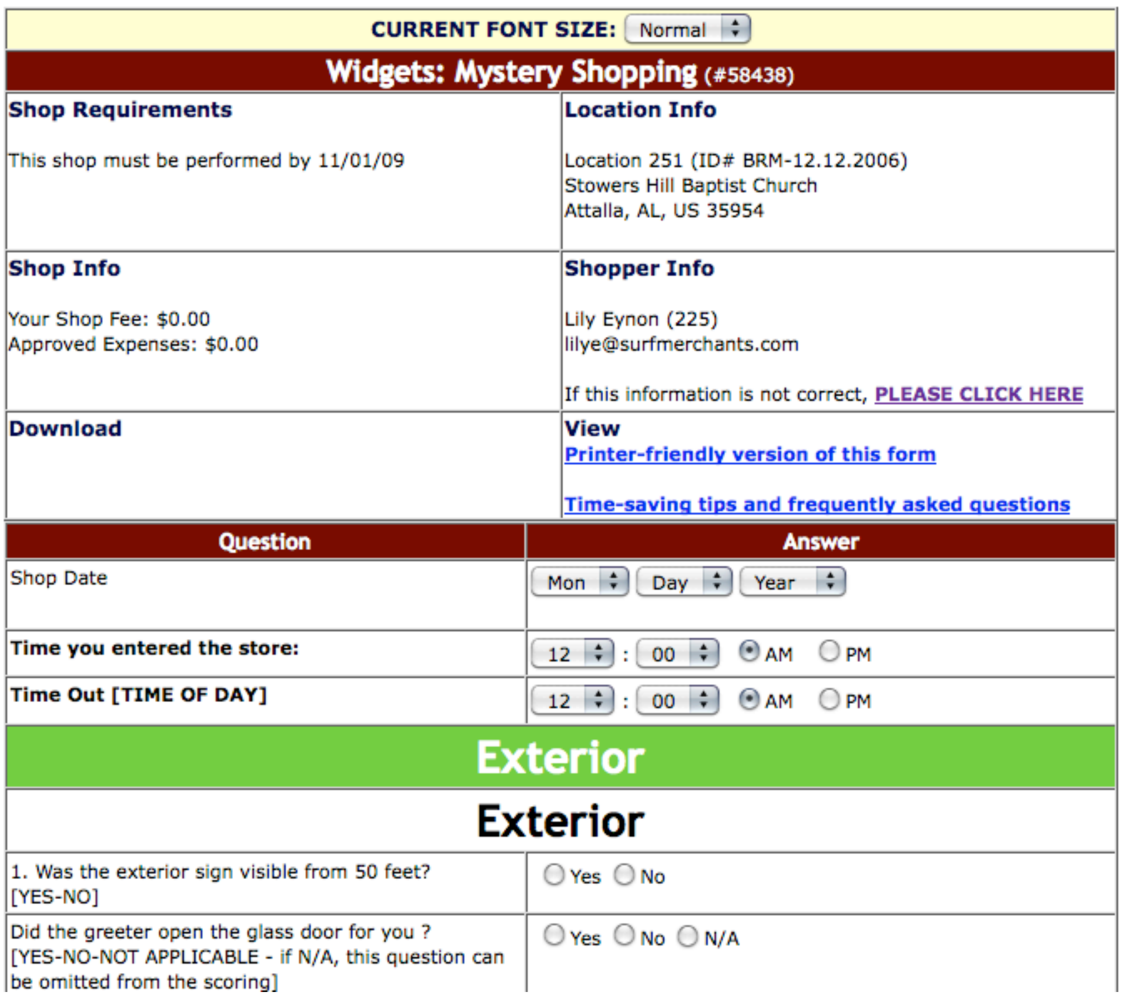


You will see a list of all of the shops assigned to that shopper, and clicking on the View/Submit button will give you access to the shopper's shop view:



Status JobID	Actions	Shop / Due Date	Survey Submit Date	Don't Shop Before	Company Survey Location	Shop Fees	Shop Rtg	Reviewer Comments
Any		Shop Due Start 1 1 06 End 12 31 12			All			GO 3 of 3 shops found
NEW # 58438	*View/Submit *Print *Help/Contact	*Due:* 11/01/09			**Widgets** -Mystery Shopping Location 251 (BRM-12.12.2006) Stowers Hill Baptist Church Attalla, AL Directions	**Shop Fee:** $0.00		

Open the shopper's shop view and fill in all of the required questions:



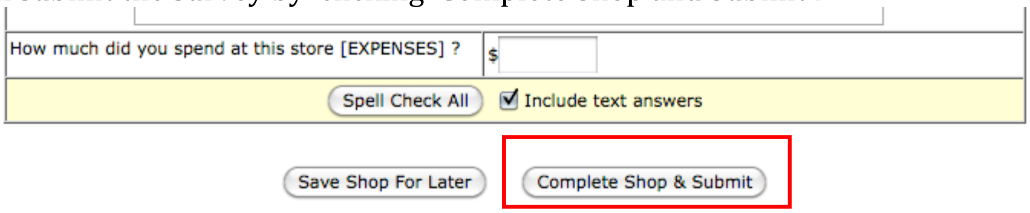
CURRENT FONT SIZE: Normal

Widgets: Mystery Shopping (#58438)

Shop Requirements	Location Info
This shop must be performed by 11/01/09	Location 251 (ID# BRM-12.12.2006) Stowers Hill Baptist Church Attalla, AL, US 35954
Shop Info Your Shop Fee: $0.00 Approved Expenses: $0.00	**Shopper Info** Lily Eynon (225) lilye@surfmerchants.com If this information is not correct, PLEASE CLICK HERE
Download	**View** Printer-friendly version of this form Time-saving tips and frequently asked questions

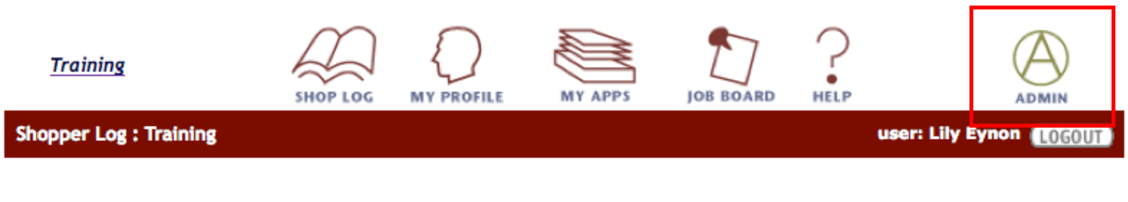
Question	Answer
Shop Date	Mon Day Year
Time you entered the store:	12 : 00 AM PM
Time Out [TIME OF DAY]	12 : 00 AM PM
Exterior	
Exterior	
1. Was the exterior sign visible from 50 feet? [YES-NO]	Yes No
Did the greeter open the glass door for you ? [YES-NO-NOT APPLICABLE - if N/A, this question can be omitted from the scoring]	Yes No N/A

Then submit the survey by clicking 'Complete Shop and Submit':



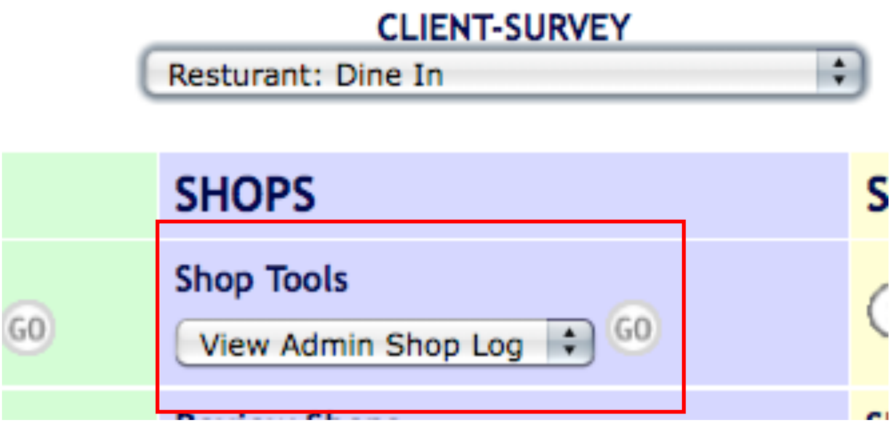
The shop is now available for review on the admin side.

From the shopper area, if you click on the A in the top nav bar, it will return you to the admin area:

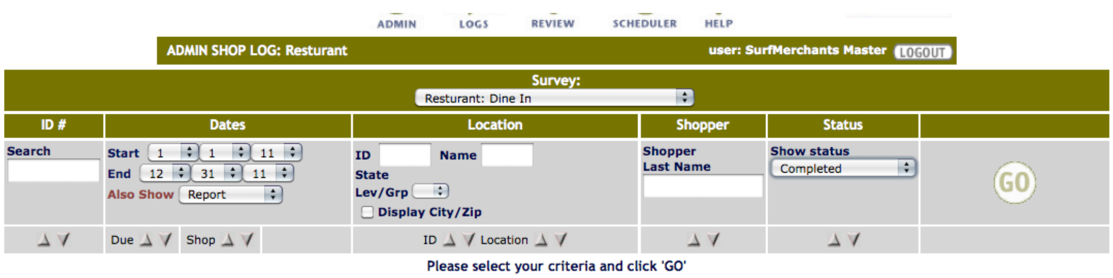


Reviewing Shops

Once the shopper has completed his/her shop and has submitted it to the admin side, he/she can no longer edit the shop. All shops are available in the admin shop log and accessible to admins:



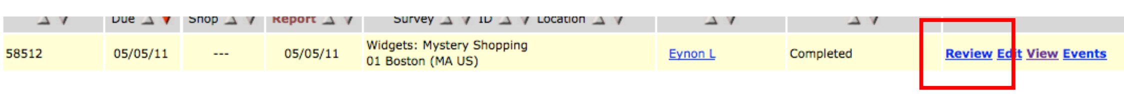
The admin shop log shows shops in all status types and can be filtered by a number of different criteria:



Shops filled in by the shopper and not yet reviewed will have a status of Complete.

For more information about the Admin Shop Log and shop statuses, please review pages 90 and 91 of the manual.

From the admin shop log, you have the opportunity to review shops by clicking on the Review link:



Selecting the review link allows you to edit any of the shopper's responses and change the status of the shop. You can send it back to the shopper for editing by moving it to the status of Incomplete or release it to client reporting by moving it to the status of Finalized.

Please see pages 90 and 91 of the manual for explanations of the other fields on the reviewer controls.

Move your shop to the status of Finalized to be included in client reporting.

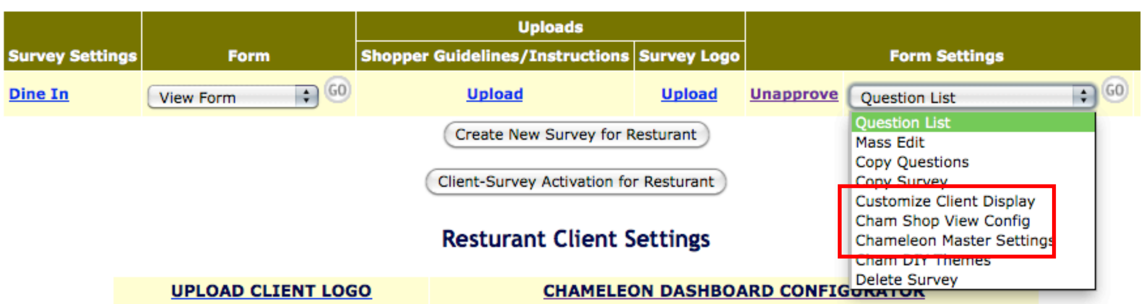
Setting up Client Reporting

The final stage is setting up your program and configuring the client reporting options.

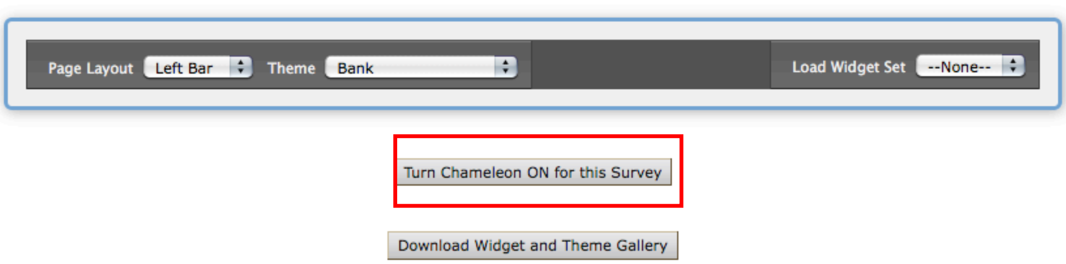
The first step is configuring the Chameleon Shop View option.

From the main admin screen, select your client and survey and click the Go button:

Select Cham Shop View Config:

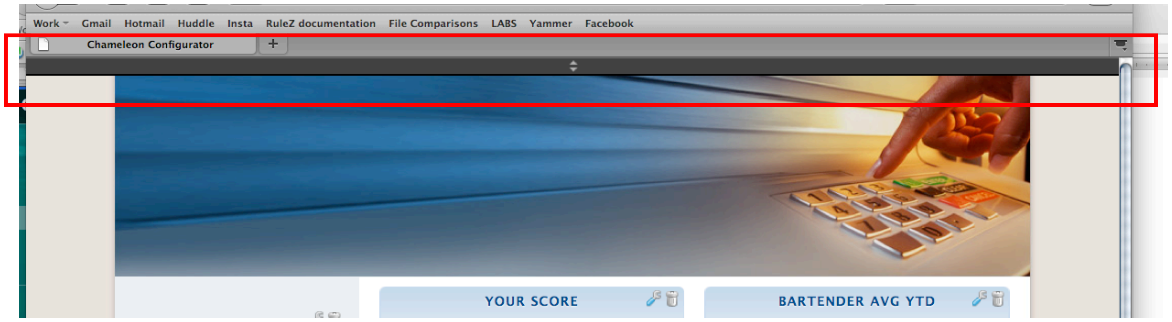


Select a Theme and a Widget Preset and select Turn Chameleon On for this Survey. If you don't have a Widget Preset, then simply leave it as "None":

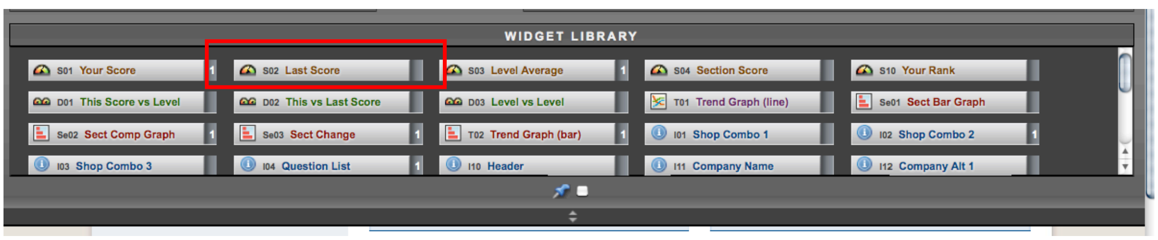


This is the view that your client will see when they access the view with the questions and answers that the shopper has filled in.

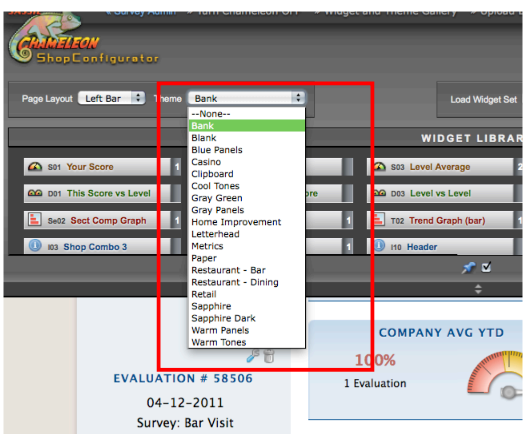
Accessing the dark grey bar at the top of the screen gives you access to the Widget drawer and additional chameleon resources:



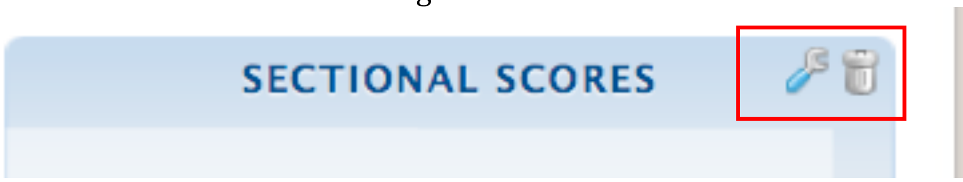
By dragging and dropping you can add additional widgets of data onto the shop view:



Switching themes will change the look of the shop view containers and text:

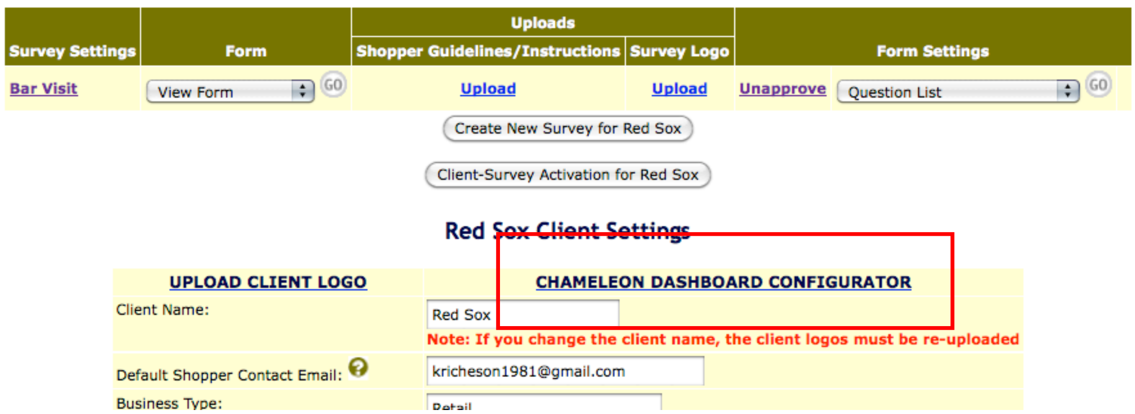


Each widget has a number of config options that can be adjusted using the wrench in the header bar and deleted using the trash can:

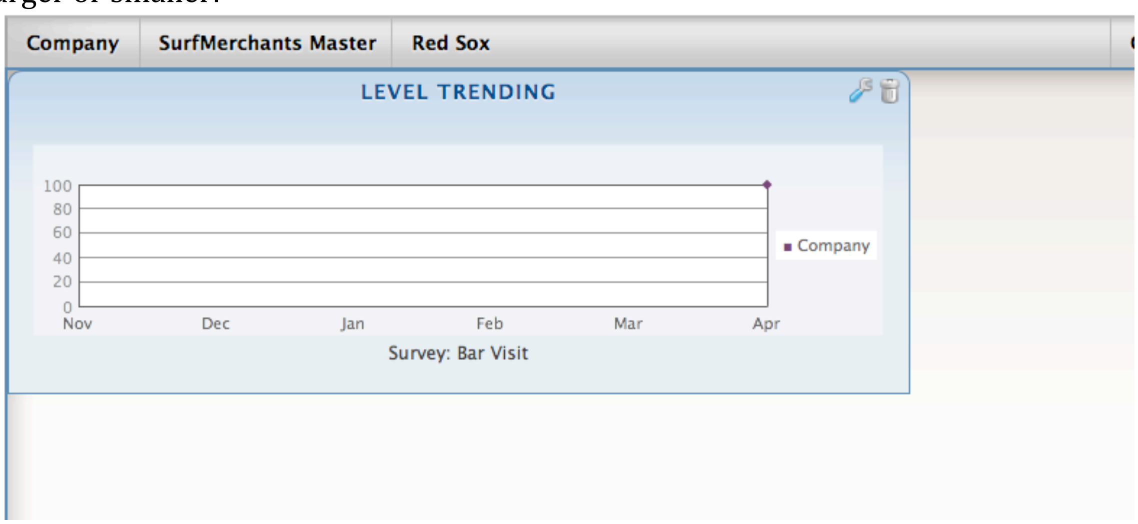


For more information about Chameleon shop views, please see:
http://marketing.sassieshop.com/chameleon/index.html

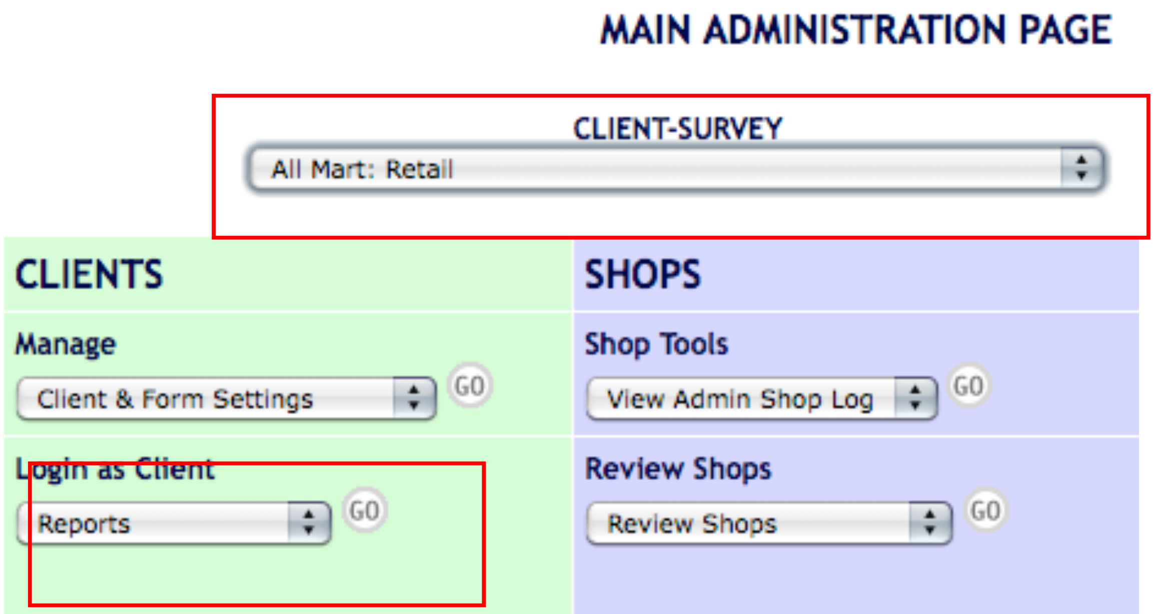
After you SAVE your setting for the shop view, you can configure the client dashboard:



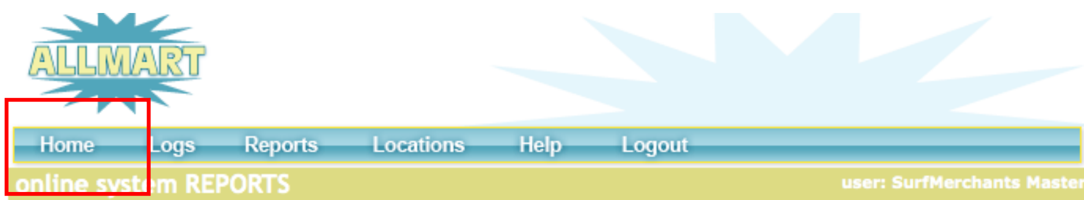
The only difference between configuring the shop views and the dashboard is that the dashboard widgets can be resized by dragging a corner of the widget to make it larger or smaller:



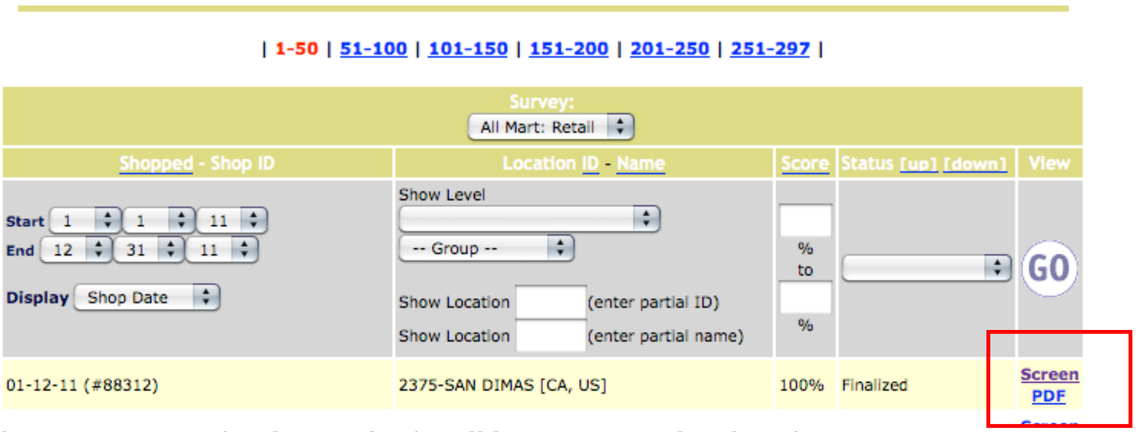
Once you have configured your shop views and your dashboard, you can return to the main admin page and log in as a client to see what your client will see. Simply select your client/survey and click the Go button next to 'Login as Client':



Clicking the Home button in the nav bar brings you to the client home page and you can review their dashboard:



Selecting Logs will bring you to the client's shop log and you can review their shop view by clicking the 'Screen' link next to the shop you want to view:



Selecting Reports (in the nav bar) will bring you to the client's reporting environment. Included in the reporting environment is a Report Revue, which is series of short movies designed to explain the output of each report: