

Log in via the Admin Login button:



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

MAIN ADMIN PAGE: All Clients user: SurfMerchants Master [LOGOUT](#)

MAIN ADMINISTRATION PAGE

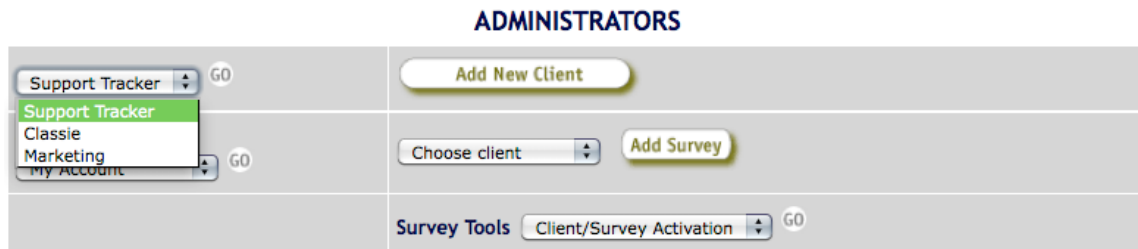
CLIENT-SURVEY
none selected

CLIENTS	SHOPS	SHOPPERS
Manage Client & Form Settings <input type="button" value="GO"/>	Shop Tools View Admin Shop Log <input type="button" value="GO"/>	<input type="button" value="Shopper Billing"/>
Login as Client Reports <input type="button" value="GO"/>	Review Shops Review Shops <input type="button" value="GO"/>	Shopper Search (partial entry OK) Last Name <input type="text"/> Email <input type="text"/> <input type="button" value="SEARCH"/>
Export Shops/Surveys <input type="button" value="GO"/>	Schedule Shops Scheduler Log <input type="button" value="GO"/>	Shopper Tools Shopper Bulk Email <input type="button" value="GO"/>

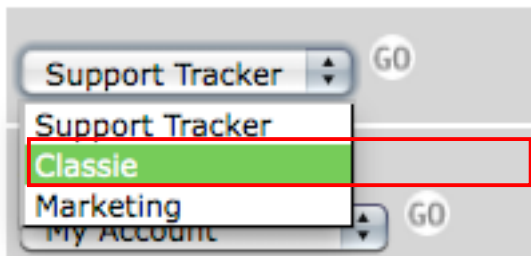
ADMINISTRATORS

<input type="button" value="Support Tracker"/> <input type="button" value="GO"/>	<input type="button" value="Add New Client"/>
Manage My Account <input type="button" value="GO"/>	Choose client <input type="button" value="Add Survey"/>
	Survey Tools Client/Survey Activation <input type="button" value="GO"/>

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:

CLASSIE
Learn to Kick some SASSIE!

[Documentation](#) | [Tests](#) | [Training Information](#)

SASSIE

- MSP System Setup
- Setting Up Your Clients
- Scheduling Your Shops
- Reviewing Your Shops

MODULES

- ICR
- IVR
- TestCaster

REPORTS

- Reporterator

CLASSIE
Learn to Kick some SASSIE!

Welcome to CLASSIE, the official interactive training center for SASSIE users.

The left menu lists the interactive training shows available to train yourself or your staff on how to use SASSIE. Clicking on the name of a training program will launch the training demonstration in this space.

Use the links at the top of the page to:

- Download PDFs of SASSIE documentation
- Take a self-administered test and show off your SASSIE skills
- Request training

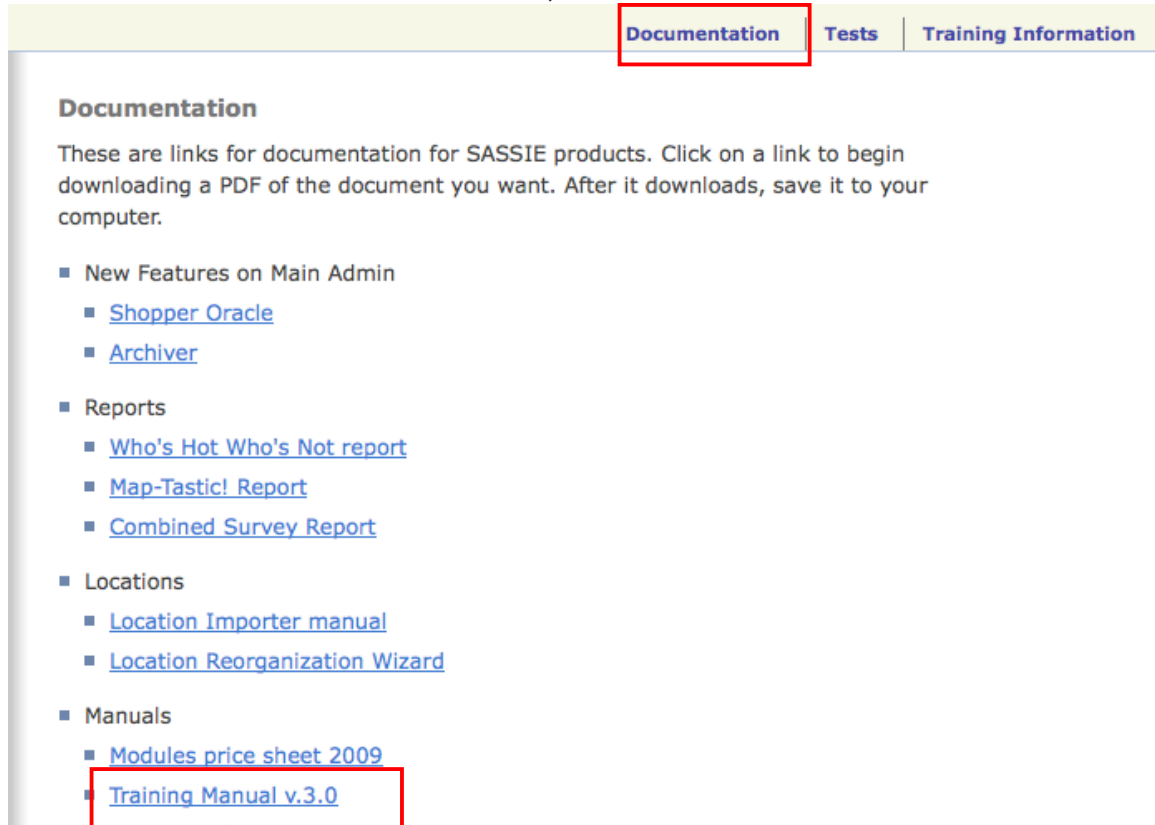
Many of the training programs include the link to a self administered test at the end.

You'll receive notification through SASSIE News when new training shows have been added to this site.

We hope you find CLASSIE a useful addition to your training process. Suggestions for improvements and new training topics are always welcome!

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.



The screenshot shows a web interface with a navigation bar at the top containing three tabs: 'Documentation', 'Tests', and 'Training Information'. The 'Documentation' tab is highlighted with a red rectangular box. Below the navigation bar, the page is titled 'Documentation' and contains a paragraph of introductory text. This is followed by a bulleted list of links categorized into 'New Features on Main Admin', 'Reports', 'Locations', and 'Manuals'. The link 'Training Manual v.3.0' under the 'Manuals' category is highlighted with a red rectangular box.

Documentation Tests Training Information

Documentation

These are links for documentation for SASSIE products. Click on a link to begin downloading a PDF of the document you want. After it downloads, save it to your computer.

- New Features on Main Admin
 - [Shopper Oracle](#)
 - [Archiver](#)
- Reports
 - [Who's Hot Who's Not report](#)
 - [Map-Tastic! Report](#)
 - [Combined Survey Report](#)
- Locations
 - [Location Importer manual](#)
 - [Location Reorganization Wizard](#)
- Manuals
 - [Modules price sheet 2009](#)
 - [Training Manual v.3.0](#)

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:

CLIENT-SURVEY
none selected

CLIENTS	SHOPS	SHOPPERS
Manage Client & Form Settings GO	Shop Tools View Admin Shop Log GO	Shopper Billing
Login as Client Reports GO	Review Shops Review Shops GO	Shopper Search (partial entry OK) Last Name <input type="text"/> Email <input type="text"/> SEARCH
Export Shops/Surveys GO	Schedule Shops Scheduler Log GO	Shopper Tools Shopper Bulk Email GO

ADMINISTRATORS

Classie GO	Add New Client
Manage My Account GO	Choose client GO Add Survey
	Survey Tools Client/Survey Activation GO

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

Create New Client

Client Name:	<input type="text"/>
Default Shopper Contact Email: ?	<input type="text"/>
Business Type:	<input type="text"/> (used to describe shop in shop posting email)
What will shoppers usually be paid for shopping this client?	<input type="text"/>
What is the usual limit on expenses when shopping this client?	<input type="text"/>
Main Contact Email(s) for this client (if more than one, separate with commas)	<input type="text"/>
Client Contact Email: ?	<input type="text"/>
Type of Year	Choose one
If using a non-calendar year type:	Year Start Date: Jan 1
If using a period year type:	How many weeks are in a period? <input type="text"/> How many periods are in a year? <input type="text"/>
Date Range Menu Type	Choose one

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:

A button with the text "Add New" inside a rounded rectangular border.

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.

Resturant Client Settings
Client updated

UPLOAD CLIENT LOGO	CHAMELEON DASHBOARD CONFIGURATOR
Client Name:	<input type="text" value="Resturant"/> Note: If you change the client name, the client logos must be re-uploaded
Default Shopper Contact Email:	<input type="text"/>
Business Type:	<input type="text"/>

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:

CLIENT-SURVEY

CLIENTS	SHOPS	SHOPPERS
Manage <input type="text" value="Client & Form Settings"/> <input type="button" value="GO"/>	Shop Tools <input type="text" value="View Admin Shop Log"/> <input type="button" value="GO"/>	<input type="button" value="Shopper Billing"/>
Login as Client	Review Shops	Shopper Search (partial entry OK)

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

SURVEY ADMINISTRATION: Restaurant		user: SurfMerchants Master LOGOUT
Create New Survey for Restaurant		
Survey Name	<input type="text"/>	Suggestions : "Current", "Retail", "Main", "Take Out"
Default Survey Shopper Contact Email	<input type="text"/>	
Survey Activation Status	<input type="text" value="Activated"/>	
What will shoppers be paid for this survey?	<input type="text" value="0.00"/>	
What is the limit on expenses for this survey?	<input type="text" value="0.00"/>	
Allow form versioning (by date) for this survey:	<input type="checkbox"/> Enable	
Advanced Survey Options		
Rulez Use custom scripts specially written to control survey behavior.	<input type="checkbox"/> Enable	
ICR/Kiosk Mode Settings		
Enable ICR/Kiosk shops for this survey	<input type="checkbox"/> Enable	
What mode do completed ICR/kiosk shops get set to?	<input type="text" value="Completed"/>	
Can client managers generate their own ICR/kiosk links?	<input type="checkbox"/> Enable	
What is the maximum number of ICR/kiosk shops allowed for this survey?	<input type="text"/> 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:	<input type="text"/>
Section 2:	<input type="text"/>
Section 3:	<input type="text"/>

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	<input type="text" value="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:

The screenshot shows the main admin page with three main sections: CLIENTS (green), SHOPS (purple), and SHOPPERS (yellow). In the CLIENTS section, the 'Client & Form Settings' button is highlighted with a red box, and a 'GO' button is next to it. Above this, the 'CLIENT-SURVEY' dropdown menu is also highlighted with a red box, showing 'Restaurant: Dine In' as the selected option.

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

The screenshot shows the 'Restaurant Surveys' page. It has a header 'Restaurant Surveys' and a table with columns: Survey Settings, Form, Uploads (Shopper Guidelines/Instructions, Survey Logo), and Form Settings. The 'Form Settings' column contains a dropdown menu with 'Question List' selected, and a 'GO' button next to it. Below the table are two buttons: 'Create New Survey for Restaurant' and 'Client-Survey Activation for Restaurant'.

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

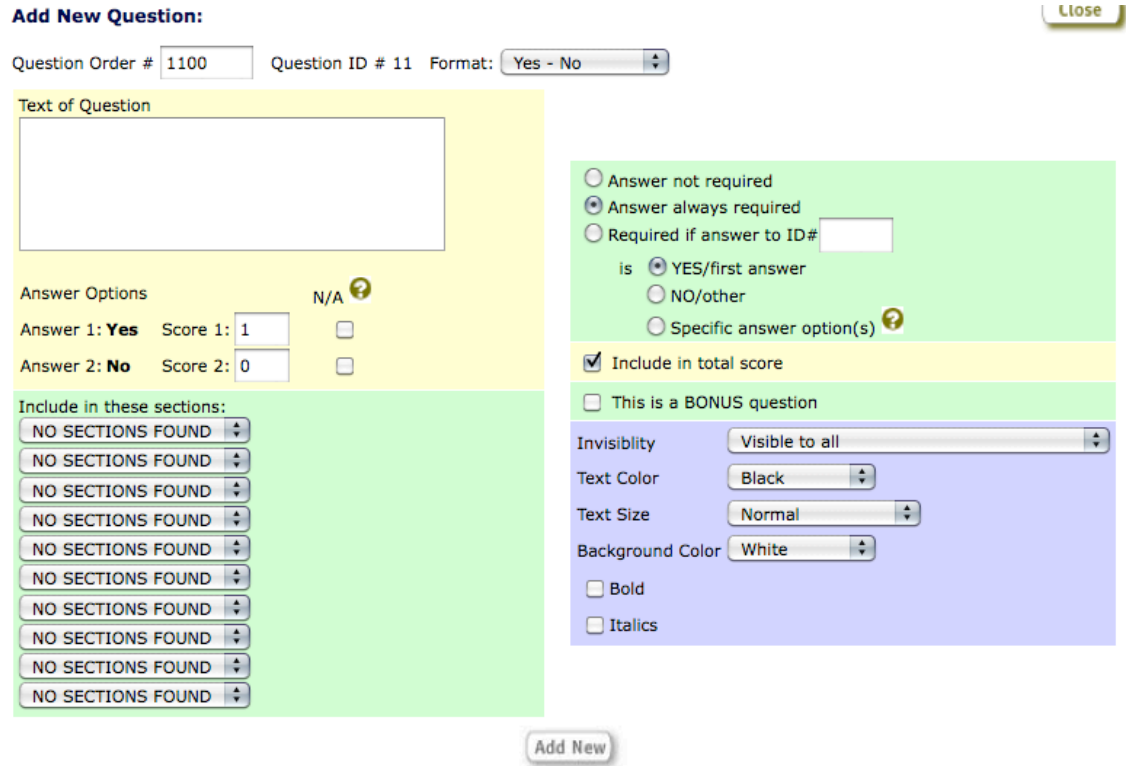
The screenshot shows the 'QUESTION LIST - Restaurant: Dine In' interface. At the top, it says 'Add question using this format' with a dropdown menu and 'at this position' with a dropdown menu set to 'End of Form' and an 'Add' button. Below this is a note: 'Note: SASSIE's performance may suffer with forms in the range of 1000 to 6000 questions. Please contact our support department for forms that approach or exceed 6000 questions.' There is a 'Add grid at position' dropdown set to 'End of Form' and a 'Go' button. A list of question types is shown in a dropdown menu: Yes - No, Yes - No - N/A, Checkbox, Multi-Checkbox (Mult Choice), Radio Button (Mult Choice), Pull Down Menu (Mult Choice), Scored Number, Number, Currency, Measurement, Time Length, Time of Day, Date, Text, Narrative, Picture Upload, Audio Upload, Recorded Phonecall, Big Header. Below the list is a table with columns: ID #, Order #, Admin, Text, Form, Answers (Scores), Sections, Hidden From, Misc. The table contains one row with ID # 1, Order # 1000, Admin links (Edit, Preview, Delete), Text 'Date shop performed:', Form 'Date', and Misc 'Is official shop date question'.

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:

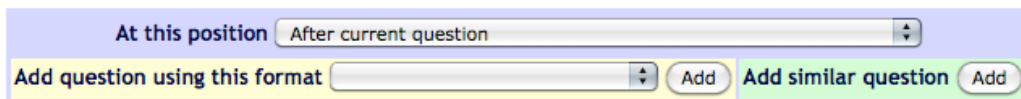


This opens a pop up where you can add the details of your question:



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

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

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

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

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)	
<p>Shop Requirements</p> <p>This shop must be performed between Demo and Demo, on these days and times: Demo: Demo</p> <p>This shop must be submitted by Demo</p>	<p>Location Info</p> <p>Demo (ID# Demo) Demo Demo Demo, Demo, Demo Demo Demo</p>
<p>Shop Info</p> <p>Your Shop Fee: \$Demo Approved Expenses: \$Demo Special Expenses (Demo): \$Demo Bonus Pay: \$Demo Comments: Demo</p>	<p>Shopper Info</p> <p>Demo Demo (#Demo) Demo@Demo.com</p>
<p>Download</p>	<p>View</p> <p>Printer-friendly version of this form</p> <p>Time-saving tips and frequently asked questions</p>
Question	Answer
Date shop performed	<input type="text" value="Mon"/> <input type="text" value="Day"/> <input type="text" value="Year"/>
Were you greeted when you entered the restaurant?	<input type="radio"/> Yes <input type="radio"/> 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:

CLIENT-SURVEY
Resturant: Dine In

CLIENTS SHOPS SHOPPERS

Manage
Client & Form Settings GO
Locations
Unlimited Location Groups
Managers

Shop Tools
View Admin Shop Log GO

Review Shops
Review Shops GO

Shopper Billing

Shopper Search (partial entry OK)
Last Name

Next, click 'Add Location':

0 locations found

Store ID	Name (* Inactive)	District	Region	City	State	Country
ID: <input type="text"/>	Name: <input type="text"/>	Level Filter: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Add Location						

No locations found. Try broadening your search criteria.

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

Location Administration

Location ID: Location Name:

Address 1:

Address 2:

City: State:

Country: Zip/Postal Code:

Phone: Area Code:

Location Hours: Days Open:

Group: [Add Group](#)

Location Manager: [Add Location Manager](#)

District: [Add District](#)

District Manager: [Add District Manager](#)

Region: [Add Region](#)

Region Manager: [Add Region Manager](#)

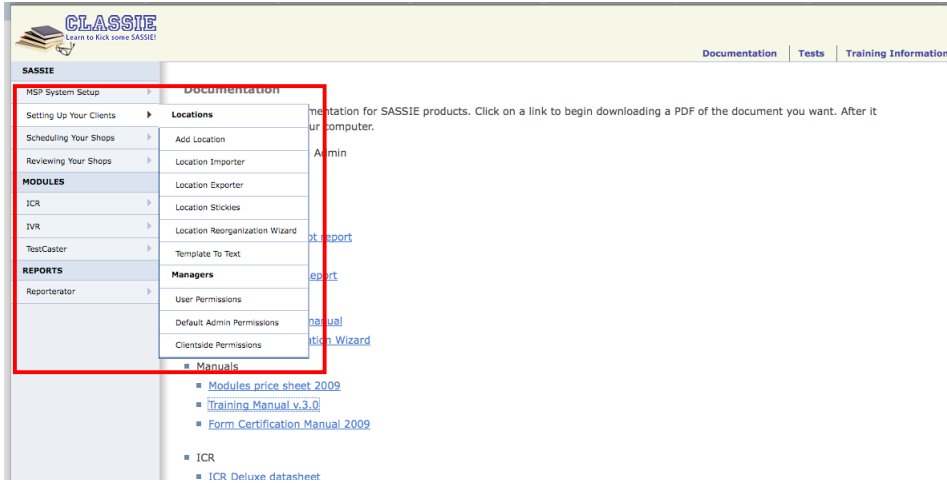
This Location belongs to the following additional groups

SET	GROUP
-----	-------

There are no Group Sets set up for this client.
[Click Here](#) to create a set.

[Add New](#)

For more detailed explanation of each of the location fields and how to bulk add locations, please refer to pages 35 through 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:

The screenshot shows a top navigation bar with a dropdown menu labeled "CLIENT-SURVEY" containing the text "Resturant: Dine In". Below this is a grid of three main sections: "CLIENTS" (green), "SHOPS" (purple), and "SHOPPERS" (yellow). Under "CLIENTS", there is a "Manage" section with a dropdown menu for "Client & Form Settings" and a "GO" button highlighted with a red box. Under "SHOPS", there is a "Shop Tools" section with a dropdown menu for "View Admin Shop Log" and a "GO" button. Under "SHOPPERS", there is a "Shopper Billing" button. At the bottom of the grid, there are links for "Login as Client", "Review Shops", and "Shopper Search (partial entrv OK)".

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

The screenshot shows a table titled "Resturant Surveys". The table has a header row with columns: "Survey Settings", "Form", "Uploads", and "Form Settings". The "Uploads" column is further divided into "Shopper Guidelines/Instructions" and "Survey Log". The "Form Settings" column is further divided into "Question List". The table contains one row with the following data: "Dine In" under "Survey Settings", "View Form" with a dropdown arrow and "GO" button under "Form", "Upload" under "Shopper Guidelines/Instructions", "Upload" under "Survey Log", "Approve" (highlighted with a red box) under "Form Settings", and "Question List" with a dropdown arrow and "GO" button under "Form Settings".

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:

Date: 04-26-11

Comments:

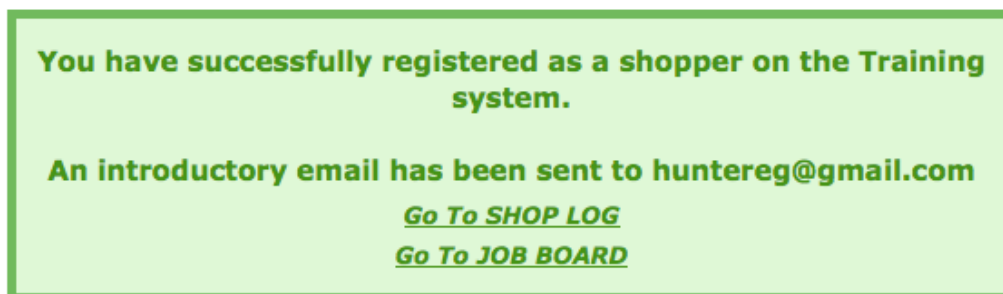
Signing up as a shopper

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:

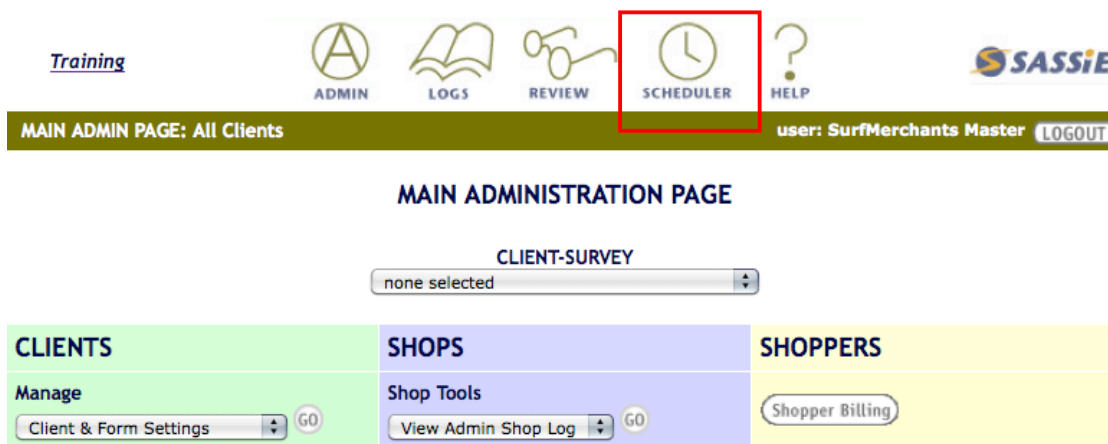


Scheduling a shop

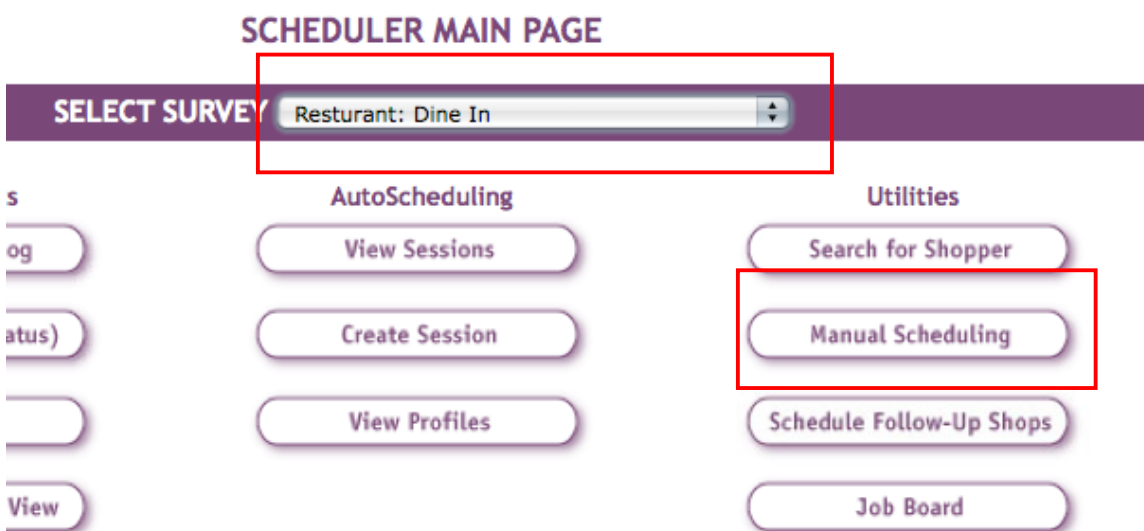
The most basic method of scheduling a shop is Manual Scheduling. This is where you know the location and you know what shopper is going to complete the assignment.

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:

Add a Shop

Resturant: Dine In

Shopper
Enter first few letters of Last Name

Select shopper (2 found)

- Eynon, Lily (NA)
- Eynon, Lily (MA)**

Postpone shopper selection (will give job a status of 'created')

Then search for your location:

Store
Enter first few characters of Store ID or Name (faster) or enter "all" to see all stores (slower)

Select store(3 found)

- 01-Boston(MA)
- MA1-Boston(MA)
- Boston-Boston(MA)

Store ID

Name

[Enable multi-location mode](#)

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:

Special Expenses

Special Expense Description

Shop Comments

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:

The screenshot shows a sidebar with a purple background and a main content area with a yellow background. The sidebar has a 'SHOPPERS' header. The main content area is divided into three sections: 'Shopper Billing', 'Shopper Search (partial entry OK)', and 'Shopper Tools'. The 'Shopper Search' section contains two input fields: 'Last Name' with the text 'eynon' and 'Email'. Below these fields is a 'SEARCH' button. The 'Shopper Tools' section contains a dropdown menu with 'Shopper Bulk Email' selected and a 'GO' button.

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

The screenshot shows the 'Shopper Search' results page. The page has a purple header with the text 'Shopper Search'. Below the header, there are two search input fields: 'Enter first few letters of LAST NAME' with the text 'eynon' and 'Enter first few letters of EMAIL ADDRESS'. Below these fields is a 'SEARCH' button. To the right of the search fields, there is a red text label 'Select shopper (passwords displayed) :'. Below this label, there is a list of search results: '2 found'. The first result is 'Eynon, Lily E [NA] (leynon@surfmerchants.com, lee2317)' and the second result is 'Eynon, Lily [MA] (lilye@surfmerchants.com, lee2317)'. Below the search results, there are four buttons: 'Log', 'Profile', 'Duplicate Search', and 'Citations'. The 'Log' button is highlighted with a red box.

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	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 This shop must be performed by 11/01/09	Location Info 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) liliye@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]	<input type="radio"/> Yes <input type="radio"/> 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]	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A

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

How much did you spend at this store [EXPENSES] ?	\$ <input type="text"/>
<input type="button" value="Spell Check All"/> <input checked="" type="checkbox"/> Include text answers	
<input type="button" value="Save Shop For Later"/> <input type="button" value="Complete Shop & Submit"/>	

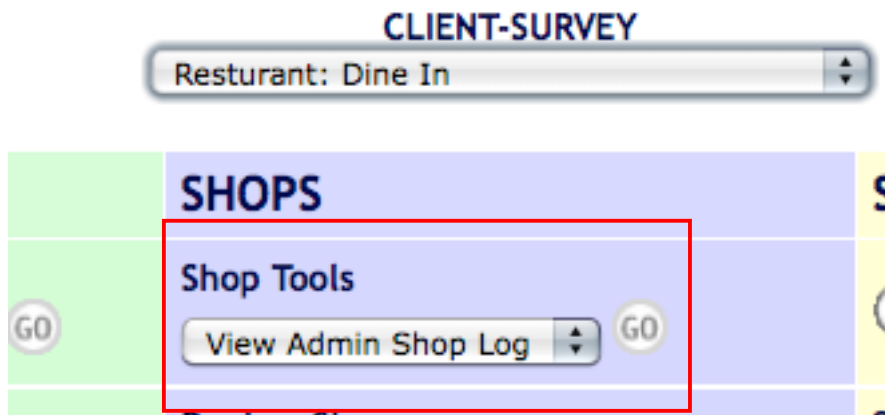
The shop is now available for review on the admin side.

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

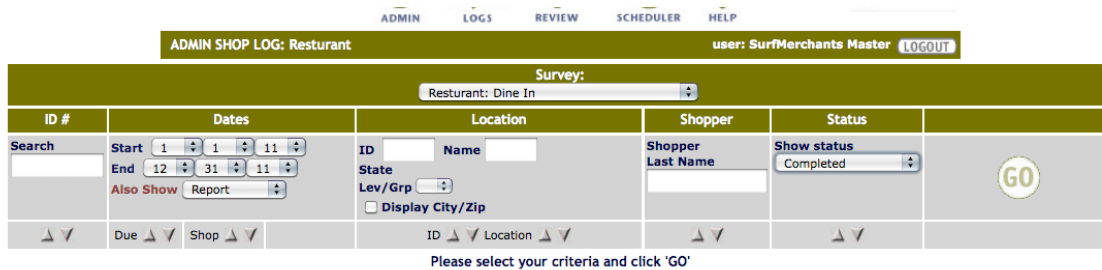


Reviewing Shops

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:



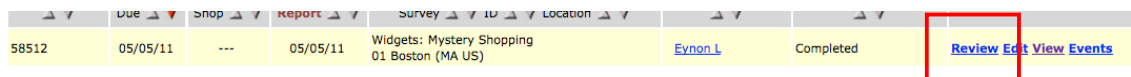
The admin shop log shows shops in all status types and can be filtered by a number of different criteria:



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

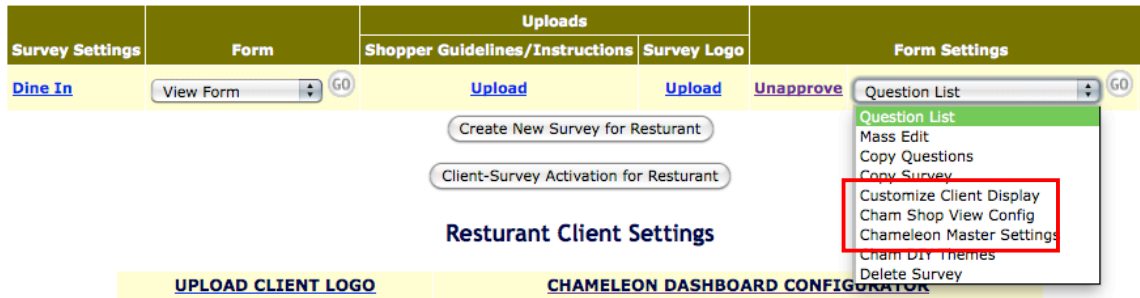
The final stage is setting up your program and configuring the client reporting options.

The first step is configuring the Chameleon Shop View option.

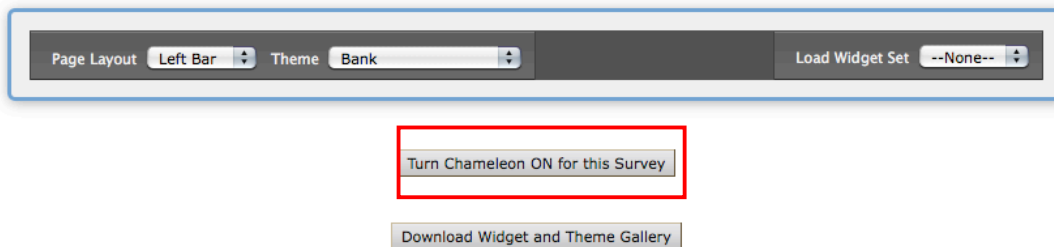
From the main admin screen, select your client and survey and click the Go button:



Select Cham Shop View Config:

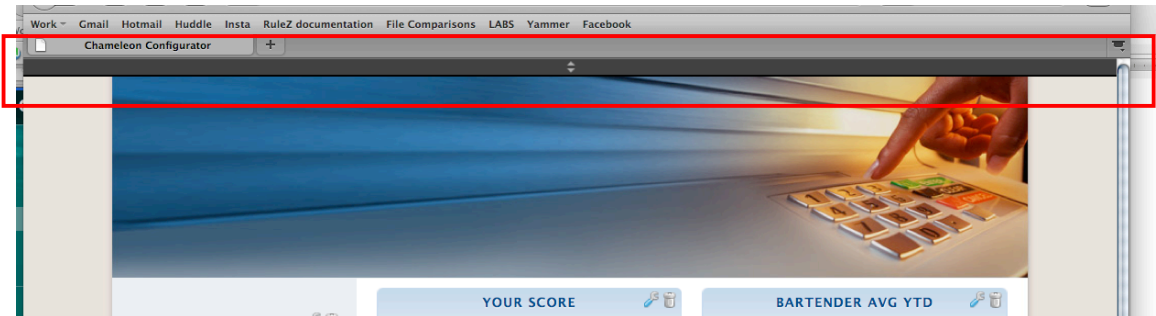


Select a Theme and a Widget Preset and select Turn Chameleon On for this Survey. If you don't have a Widget Preset, then simply leave it as "None":

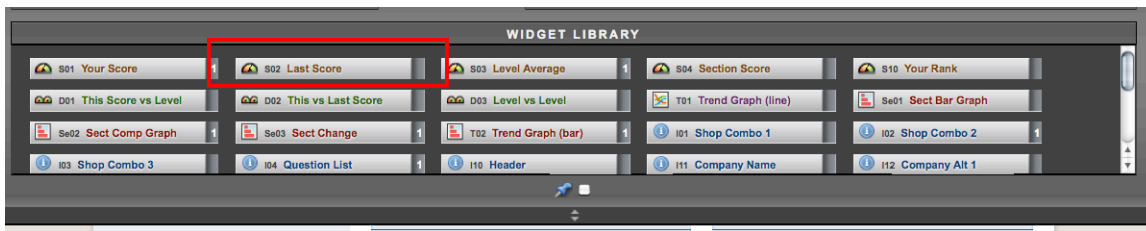


This is the view that your client will see when they access the view with the questions and answers that the shopper has filled in.

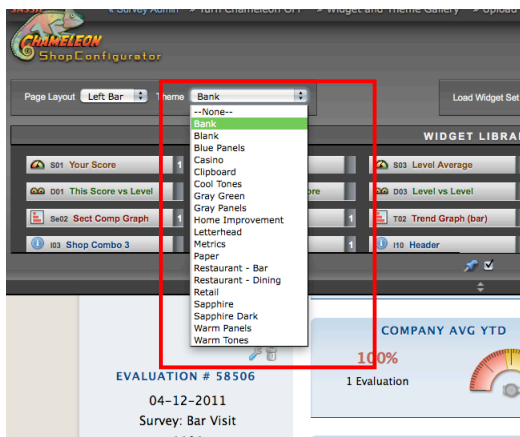
Accessing the dark grey bar at the top of the screen gives you access to the Widget drawer and additional chameleon resources:



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:

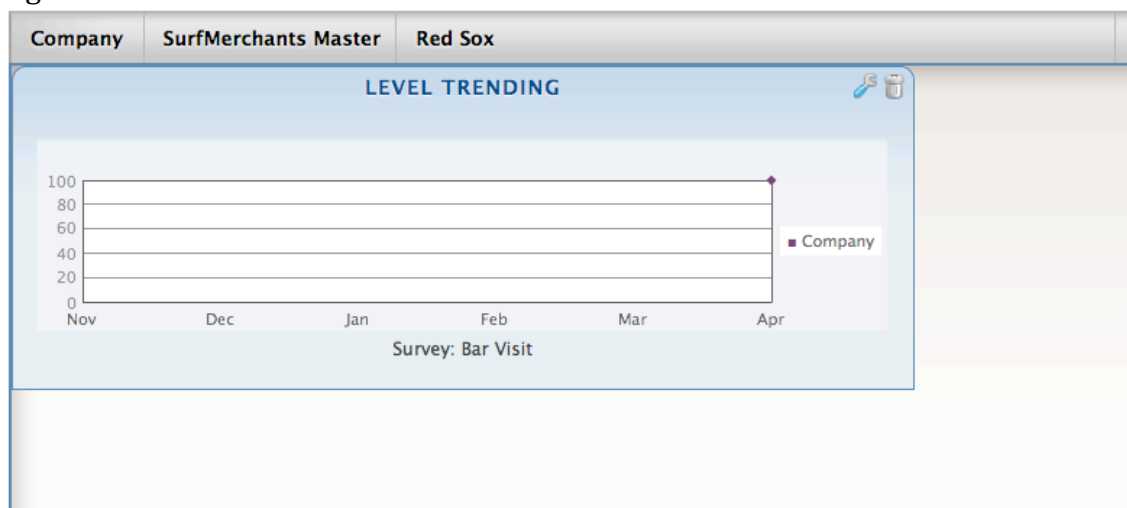


For more information about Chameleon shop views, please see: <http://marketing.sassieshop.com/chameleon/index.html>

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

Survey Settings	Form	Uploads		Form Settings
		Shopper Guidelines/Instructions	Survey Logo	
Bar Visit	View Form <input type="button" value="GO"/>	<input type="button" value="Upload"/>	<input type="button" value="Upload"/>	<input type="button" value="Unapprove"/> Question List <input type="button" value="GO"/>
<input type="button" value="Create New Survey for Red Sox"/>				
<input type="button" value="Client-Survey Activation for Red Sox"/>				
Red Sox Client Settings				
UPLOAD CLIENT LOGO		CHAMELEON DASHBOARD CONFIGURATOR		
Client Name:	<input type="text" value="Red Sox"/>	Note: If you change the client name, the client logos must be re-uploaded		
Default Shopper Contact Email:	<input type="text" value="kricheson1981@gmail.com"/>			
Business Type:	<input type="text" value="Detail"/>			

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:

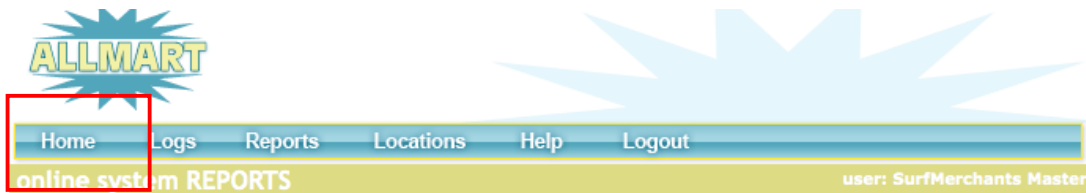


Once you have configured your shop views and your dashboard, you can return to the main admin page and log in as a client to see what your client will see. Simply select your client/survey and click the Go button next to 'Login as Client':

MAIN ADMINISTRATION PAGE

The screenshot shows the 'MAIN ADMINISTRATION PAGE' interface. At the top, there is a dropdown menu labeled 'CLIENT-SURVEY' with the selected option 'All Mart: Retail'. Below this, the page is divided into two main columns: 'CLIENTS' (green background) and 'SHOPS' (purple background). Under 'CLIENTS', there are two sections: 'Manage' with a dropdown 'Client & Form Settings' and a 'GO' button, and 'Login as Client' with a dropdown 'Reports' and a 'GO' button. Under 'SHOPS', there are two sections: 'Shop Tools' with a dropdown 'View Admin Shop Log' and a 'GO' button, and 'Review Shops' with a dropdown 'Review Shops' and a 'GO' button. Red boxes highlight the 'CLIENT-SURVEY' dropdown and the 'Reports' dropdown in the 'Login as Client' section.

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:

Survey:				
All Mart: Retail				
Shopped - Shop ID	Location ID - Name	Score	Status [up] [down]	View
Start <input type="text" value="1"/> <input type="text" value="1"/> <input type="text" value="11"/> End <input type="text" value="12"/> <input type="text" value="31"/> <input type="text" value="11"/> Display <input type="text" value="Shop Date"/>	Show Level <input type="text"/> -- Group -- <input type="text"/> Show Location <input type="text"/> (enter partial ID) Show Location <input type="text"/> (enter partial name)	<input type="text"/> % to <input type="text"/> <input type="text"/> %	<input type="text"/>	<input type="button" value="GO"/> Screen PDF
01-12-11 (#88312)	2375-SAN DIMAS [CA, US]	100%	Finalized	

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:

Home
Logs
Reports
Locations
Help
Logout

online system REPORTS
user: SurfMerchants Master

Survey
 All Mart: Retail

Location Reports <input type="text" value="Company Overview"/> <input type="button" value="Go"/>	Manager Report <input type="text" value="Manager Report"/> <input type="button" value="Go"/>
Survey Reports <input type="text" value="Answer Summary"/> <input type="button" value="Go"/>	Demographic Report <input type="text" value="Demographic Report"/> <input type="button" value="Go"/>
Trending & Graph Reports <input type="text" value="1 Year"/> <input type="button" value="Go"/>	PDF/Printable Reports <input type="text" value="Custom Date Range reports"/> <input type="button" value="Go"/>
Multiple Survey Reports <input type="text" value="6 Period"/> <input type="button" value="Go"/>	Report Distribution <input type="text" value="Email Link Distribution"/> <input type="button" value="Go"/>
Report Revue <input type="text" value="Report Revue"/> <input type="button" value="Go"/>	