



# **QUICK**

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# **START**

## *Scheduler Wizard*

VERSION 1.0 6/2/04

Welcome to this Quick Start Guide to the new AutoScheduler for SASSIE version 3.0, now called the Scheduler Wizard.

To begin:

FROM THE MAIN ADMIN PAGE : Select the “Schedule Shops” Menu and choose the “Create Session” option.

Before beginning to create the actual scheduling session, we must first select the “AutoProfile”, a profile of the kind of shopper allowed to perform the shops in this session.

The “Create Session” menu option brings you to the “Select AutoProfile” page, where you can select a previously created profile, or choose to “Create New Profile”.

Profiles are created specifically for one client and one survey,

Select AutoProfile
user: John Hsu [LOGOUT](#)

### CREATE SCHEDULING SESSION

[Create New Profile](#)  
 OR  
 Select Profile Below

**VIEW PROFILES**

Company

Show Profiles from the last  days

[View](#)

Date Created	Company	Profile Name	Offer to Shoppers by	View / Edit	Requirements	Schedule Shops / Create Session
05-26-04	Puck's Palace: UK Daycare	Puck's Palace-UK Daycare 5-2004 sheila (05-26-04)		<a href="#">view/edit</a>		<a href="#">Create Session</a>
05-26-04	Retail Store USA: Sheila	Retail Store USA-Sheila newschedwizard (05-26-04)		<a href="#">view/edit</a>		<a href="#">Create Session</a>
05-25-04	Aaron: New Survey	Aaron-New Survey 5-2004 (05-25-04)		<a href="#">view/edit</a>	* Shopper must accept PayPal payments * Days before repeating location: <b>21</b>	<a href="#">Create Session</a>
05-25-04	Widgets Unlimited: Main	Widgets Unlimited-Main 5-2004 - new Sch Wiz (05-25-04)		<a href="#">view/edit</a>		<a href="#">Create Session</a>
05-09-04	Widgets Unlimited: Main	Widgets Unlimited-Main SMP (05-09-04)	was: <b>state</b> <a href="#">info</a>	<a href="#">view/edit</a>		<a href="#">Create Session</a>
05-05-04	Widgets Unlimited: Restaurant	Widgets Unlimited-Restaurant 5-04 (05-05-04)	was: <b>state</b> <a href="#">info</a>	<a href="#">view/edit</a>	* Days before repeating location: <b>30</b>	<a href="#">Create Session</a>

V3 Change: Previously, you had to select the Shopper Matching Method when you created the profile – now this decision is made when you select the session settings later. The “Offer to Shoppers By” column is shown in gray to signify that these profile match method settings no longer apply in version 3.

What's a Matching Method ? A Shopper Matching Method of **state**, as shown in a few examples above, any shopper living in the same state as any of the locations in the session will receive an email.

If you decide to create a new AutoProfile, you'll be presented with the following "AutoProfile Admin" page :

In this example, we are creating a profile for the company named Widgets Unlimited and its "Main" survey.

V3 change : The link in blue signifies where we previously made the Shopper match Method selection.

"Enforce 30 days" – here we prevent the same shopper from shopping the same location within the next 30 days.

"Minimum Shopper Rating" – here we decide to only allow shoppers with a 5/10 rating or higher to apply for this shop

"Age 21 Years or More" – We limit these shops to those who are 21 years or Older.

NOTE: This setting also prevents emails from being sent to those below 21.

"Gender : Male" – We limit these shops to men.

NOTE: This setting also prevents email from being sent to those who are not male.

NOTE : In fact, the only settings that prevent mail from being sent are the Age setting and the Gender setting". In contrast, the Income setting of \$20,000 will NOT prevent emails from being sent to those below 21. However, if someone below decides to apply for a shop with this profile, they will be blocked.

Why do we do this ? Since shopper data is not always up to date (and is often carelessly entered), we decided to only have Age/Birthdate and gender (two important demographics that are unlikely to change) limit the emails.

Once we have selected/created a profile, we are ready to begin our session.

## CREATE SESSION

Step 1 of 6: Session Settings

### Widgets Unlimited

Apply these changes to	
Session Name	June Shops
Self Assign	<input checked="" type="checkbox"/> Make these Self Assign shops (first applicant gets shop) Limit shoppers to <input type="text" value="3"/> self assigned shops for this session
Wave Name (optional)	Enter name of new Wave <input type="text" value="Widgets Spring Campaign"/> or select previous Wave <input type="text" value=""/>
Session Scheduler	John Hsu
Due Date	<input type="text" value="6"/> / <input type="text" value="15"/> / <input type="text" value="2004"/>
Submit Due Date	<input type="text" value="6"/> / <input type="text" value="17"/> / <input type="text" value="2004"/> (optional)
Start Date	<input type="text" value="5"/> / <input type="text" value="28"/> / <input type="text" value="2004"/> (optional)
Reporting Date	<input type="text" value="6"/> / <input type="text" value="1"/> / <input type="text" value="2004"/> (optional - will default to Due Date)
Shopper's Pay \$	<input type="text" value="10.00"/>
Bonus Pay \$	<input type="text" value="0.00"/>
Shop Expenses \$	<input type="text" value="5.00"/>
Special Expenses \$	<input type="text" value="3.00"/> Description <input type="text" value="tipsparking"/>
Hours	<input type="text" value="9a-5p"/>
Days of week	<input type="text" value="M-Sat"/>
Shop Comments	<input type="text" value="Remember to Buy Blue Widgets !"/>
Temporary Email Comments	Please only accept this shop if you are willing to buy blue widgets and can definitely submit your report by 6/17.
Note : Do NOT enter shop instructions here. These temporary	

Self Assign – if your company has opted for the Self Assign module, you will see the purple row here that allows you to designate a Self Assign session. Self Assign allows shoppers to assign shops to themselves on a first-come first-serve basis (NOT recommended for more quality-sensitive surveys where a higher degree of control over who gets which shop can have a huge impact on project success).

Waves – if your company opted for the Waves option, this session's results can be grouped with other session's results into a "Wave". In this case, the "Widgets Spring Campaign" is the Wave and can include many sessions, including those involving other surveys for Widgets Unlimited.

The only required field on this entire form is the Due Date (the last day the shopper is allowed to visit the location). The Submit Due Date field informs the shopper when his/her completed survey should be submitted by. The Start Date prevents shoppers from starting the shop ahead of time.

The Shop Comments are for brief reminders on the upcoming shop. These stay with the shop for the history of the shop.

The Temporary Email Comments are for comments to help a shopper decide whether or not to apply for a shop. Shop instructions should be loaded as a separate document and NOT posted in this temporary email comments field since they will disappear as soon as the shop gets assigned.

## CREATE SESSION

Step 2 of 6: Select Locations

CANCEL SESSION

Select Locations to Schedule :

[All Locations in Company](#)

[By Group](#)

[By Area](#)

[By Division](#)

[By Region](#)

[By District](#)

[Individual Locations](#)  
(from a list of all locations)

**By Individual Location**  
(Enter 1 Location ID # per line)

MA1  
MA2  
CA2  
NY1  
GE1

GO

The next step is to select which locations you'd like to include in this session.

You can select:

\* **All Locations in Company**

\* **Subdivision** (i.e. district, region, division, area ... or however that particular client is set up) or **Group** (usually a location type, such as Taco Bell "Express" vs. Taco Bell "Regular" or "Super" Walmart vs "Regular" Walmart) and check off which districts, region, groups, etc. you'd like included in this session

\* **Individual Locations** – displays a list of every location in the company so you can check off the ones you want. Not recommended for companies with hundreds or thousands of locations

\* **Individual Location ID** – You can enter (or cut & paste) a list of Location IDs into the text box (1 Location ID per line, as shown in the example above where locations #MA1, #MA2, #CA2, #NY1, and #GE1 are to be shopped. For safety, the system will check to make sure all of your Location IDs are valid (and highlight all of the incorrect IDs). This method is recommended for selecting individual locations for companies with hundreds or thousands of locations.

## CREATE SESSION

Step 3 of 6: Verify Locations

CANCEL SESSION

Yes, the locations below are correct :

No, the locations below are NOT correct:

NEXT →

← BACK

### SCHEDULE ALL LOCATIONS FOR COMPANY

#### Location ID - Location

49 locations found

#400 - South Boston (MA,US)  
#CA09 - Arcadia [CA]- US -> This Location is INACTIVE and will not be scheduled [\(activate\)](#)  
#CA10 - Hollywood (CA,US)  
#CA11 - Big Oak (CA,US)  
#CA12 - Sonoma (CA,US)  
#CA12.2 - Mulholland Falls (CA,US)  
#CA13 - Rodeo (CA,US)  
#CA14 - San Fernando (CA,US)  
#CA15 - Torrance (CA,US)  
#CA16 - Reseda (CA,US)  
#CA17 - Beverly Hills (CA,US)  
#CA18 - Goleta (CA,US)  
#CA19 - Carmel (CA,US)  
#CA20 - Mariposa (CA,US)  
#CA3 - San Francisco. CA (CA,US)

After making your selections, the system will display a list of all locations (unless the list is extremely long) and will always display any locations that have been deactivated – these will not be included in the session.

TIP : Please make sure that this page is finished loading before moving onto the next page if you are including many locations, as it often takes awhile to load. If you move too quickly to the next page, you may end up missing some locations which haven't had sufficient time to load.

The next step is to select the shopper matching method – in other words, how do we find shoppers likely to shop these locations ?

## CREATE SESSION

Step 4 of 6: Shopper Matching

[CANCEL SESSION](#)

**Shopper Target:** Between  and  shoppers per location.

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**Match Shopper Using:**

**SmartMatch by Zip Method (recommended)** ?

OR

**Manual Method:**

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Show search results ?

Clear cache ?

[Go!](#)

The "Shopper Matching" step of the Scheduler Wizard helps you find shoppers based on their proximity to the locations being scheduled.

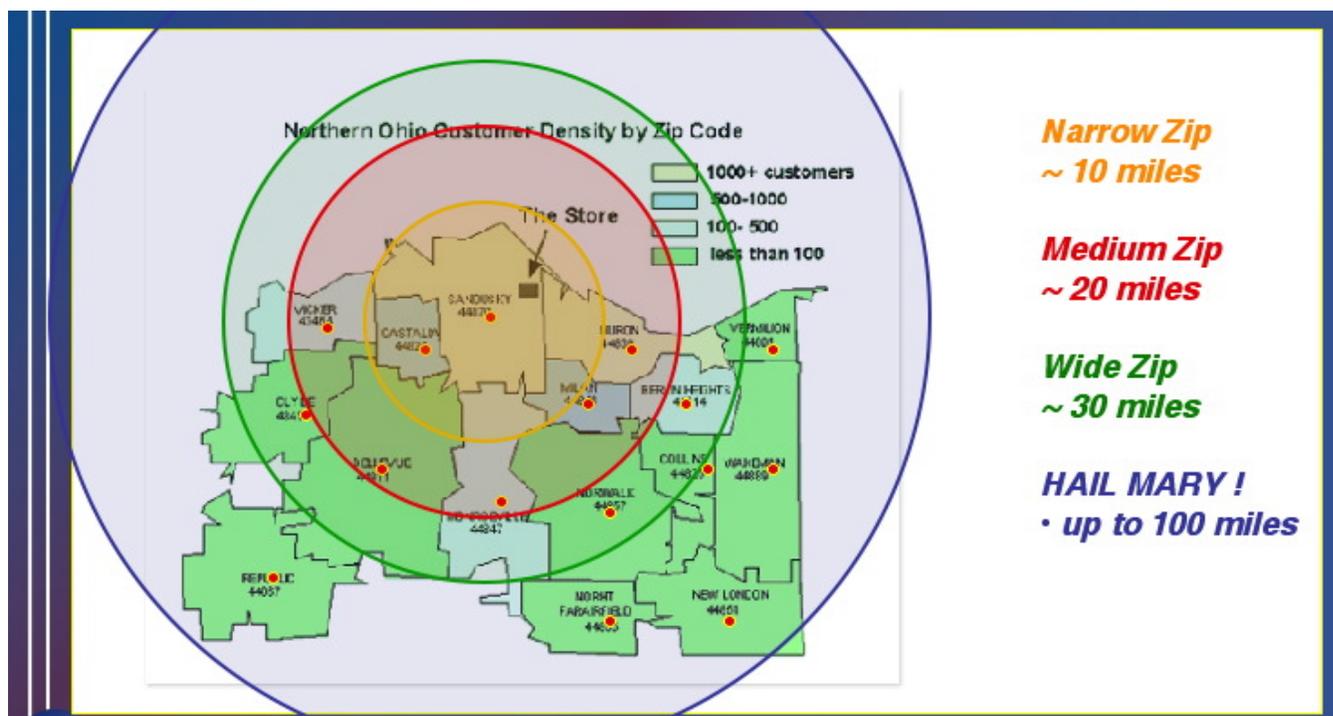
First, you determine the number of shoppers you want to find per location by filling in the appropriate **Shopper Target** inputs. In this example, we specify that we'd like to find between 20 to 250 shoppers per location – the wider a range you select, the easier it will be to zero in on which locations are going to present scheduling problems. The first number (minimum acceptable shoppers) can be at MOST 100 shoppers, and the second number (maximum acceptable shoppers) has to be at LEAST 50.

Next you'll need to select the Shopper Matching method.

**TIP: For all sessions in the USA, we highly recommend using the “SmartMatch by Zip” Method and allowing the system to automatically select the ideal matching method for each location.**

V3 change: We have added five new matching methods, all of which use Zip Code and Radius in miles to match up shoppers with locations: Zip Narrow, Zip Medium, Zip Wide, Zip Last Resort and SmartMatch by Zip (which utilizes all four of the other Zip Distance matching methods. These methods are superior to the previous methods (Country, State, Area Code and Zip Code Zone, which are still available).

How does Smart Match by Zip work (and why is this probably the only method I need to use ?)



SmartMatch by Zip takes each location and searches for shoppers within 10, 20, 30 or 100 miles until it finds a number of shoppers in the target range you've specified. This has many advantages over the State and Area Code method:

- Shoppers that live across an area code border or state border but are within range will be included
- Shoppers who live clear across a large state such as Texas or California beyond 100 miles of a location will not be included – this is especially helpful for those sessions with very few shops.
- Locations in a densely populated area such as Manhattan will only include shoppers in a small range (since you won't have to look very far to get enough shoppers for that location), whereas locations in sparsely populated areas will include shoppers as far away as 100 miles.
- This method automatically selects the shoppers most likely to actually do these shops and saves you the time and hassle of sending out thousands of wasteful unwanted emails that only increase the amount of time it takes to reach your prime target shoppers.

For non-US shops, we hope to have a similar system based on cities (rather than zip codes) available soon.

After submitting the initial page, you will be presented with the highly useful Shopper Match Report, which will alert you to “Danger” locations, those that are in danger of not getting filled.

Scheduler Wizard
HELP

## CREATE SESSION

Step 4 of 6: Shopper Matching

CANCEL SESSION

A total of 17715 shoppers are currently selected for 3569 locations.

SHOPPER MATCH RESULTS			
Locations on target	3505 locations (98%)	Locations matched with these methods: 3062 - Zip Code/Distance (medium ~20 mi.) 278 - Zip Code/Distance (wide ~30 mi.) 61 - Zip Code/Distance (narrow ~10 mi.) 104 - Zip Code/Distance (last resort ~50 mi.)	
Too Few Shoppers	62 locations (2%) <i>view list below</i>	last used: SmartMatch by Zip <input type="text" value="retry with State"/>	Retry
Too Many Shoppers	2 locations (< 1%) <i>view list below</i>	last used: SmartMatch by Zip <input type="text" value="retry with SmartMatch by Zip"/>	Retry
Start Over	Target: Between <input type="text" value="20"/> and <input type="text" value="250"/> shoppers per location.	Match shoppers by <input type="text" value="SmartMatch by Zip"/> <input type="checkbox"/> Clear cache <span style="font-size: 0.8em;">?</span>	Start Over

**When you're satisfied with your Match Results, click the “Good Enough ! Move On!” button**

**Locations on Target:** The green row tell us we found our target number of shoppers (20 to 250) for 3505 locations. The next column specifies exactly which methods were used to achieve the target number.

**Too Few Shoppers :** The orange row shows us that 62 locations had fewer than 20 shoppers matched. These are our danger locations, the ones that may be hard to fill. **Keep in mind for each of these “too few shoppers” locations, the system searched 100 miles from each location and still failed to find enough shoppers.**

TIP : In desperate situations, you can use the “retry” option to choose a wider search method such as Area Code or State, but this is generally not recommended. You will certainly get more shoppers matching, but since they will all be more than 100 miles away from any location you're probably adding shoppers that will never do those shops anyway and just giving yourself a false sense of security !

**Too Many Shoppers:** The blue row shows locations that have too many shoppers, even within a 10 mile radius of the location. In this case, it may be useful to retry with “Zip Code Zone” as a way to pare down the number of shoppers.

Having the list of locations where there are too few shoppers can be a very helpful tool for determining where you should focus your shopper recruitment efforts.

TIP : If you click the number of matches (such as the number 15 for the LAREDO location), you can see a list of the emails for those 15 shoppers – handy for making direct contact with those shoppers for those hard to fill shops.

<b>Locations with too few shoppers</b>			
Location	Matches	Location	Matches
#0010638400: Goldsboro (NC, US)	0	#0016230400: Village at Sunset Beach (NC, US)	0
#0075000909: Killlearn Lakes (FL, US)	0	#0750003713: Key West Flagler (FL, US)	<a href="#">8</a>
#0750109373: Duval (FL, US)	<a href="#">8</a>	#0750109539: Olde Naples (FL, US)	0
#0990002784: LAREDO (TX, US)	<a href="#">15</a>	#1720000675: West Cumming (GA, US)	0
#1720101120: Monarch Plaza (GA, US)	0	#1720101156: FOREST PARK (GA, US)	0
#1720101183: HORIZONS (GA, US)	0	#1720101224: Jones Bridge (GA, US)	0
#1720101253: MABLETON (GA, US)	0	#1720101290: Powers Ferry (GA, US)	0
#1720101291: AUSTELL (GA, US)	0	#1720102555: CONYERS WEST AVENUE (GA, US)	0
#1720102897: AUBURN (GA, US)	0	#1720204201: ATHENS MAIN OFFICE (GA, US)	0
#1720233370: CONYERS SOUTHSIDE (GA, US)	0	#2951011529: Chantilly (VA, US)	0
#2951011534: Newgate (VA, US)	0	#2951011562: Leesburg East End (VA, US)	0
#2951011930: Radford (VA, US)	0	#3180000242: CORONA (CA, US)	0
#3180000734: NORCO (CA, US)	0	#3180000899: ALTURAS (CA, US)	<a href="#">14</a>

Finally, you'll need to select how you'd like these shops to be distributed:

**CREATE SESSION**  
Step 5 of 6: Choose Distribution Method

**SHOPS CREATED !**  
245 shoppers matched the profile and locations

**NOTE: This session is being scheduled for SELF ASSIGNED shops**

**CHOOSE FROM THE FOLLOWING:**  
(This is the final step - shops cannot be cancelled afterwards!)

**DELETE ALL SHOPS AND CANCEL SESSION**

**LEAVE SHOPS ON SYSTEM**  
(but do not email or post shops on job board)

**POST TO JOB BOARD ONLY (no emails)**

**EMAIL SHOPPERS**

FROM:  (enter your address)

TO:  245 matching shoppers  
 Send test email to the FROM address listed above

Also Post These Shops on the Job Board

\* Delete All Shops – obviously, this is your last chance to chicken out and cancel !

\* Leave Shops on System – this option is handy for those situations where you want to create the session and the shops but don't want shoppers to know about them yet (i.e. this is generally done in conjunction with a later resend of emails or posting to the job board).

\* Post to Job Board Only – this option allows these shops to be visible on the Job Board, where shoppers can search for shops

\* Email Shoppers – this option actually sends out the emails (and simultaneously posts them on the Job Board, if desired).

If you'd like to send yourself a test email to see what it looks like first, you can select the "Send test email" option – it will go the address in the FROM field listed above and you'll be able to instantly go back to this page and send out the emails for real.

Below that control box you'll see a preview of what the email looks like- you can directly edit certain parts of the email (located in the large text box). To edit other parts of the email such as the Due Date or Start Date or Shop Comments or Temporary Email Comments, you'll need to click the "Edit session settings" link and make the changes directly to the session. Those changes will automatically be reflected here when you are sent back to this page.

**THE FOLLOWING EMAIL WILL BE SENT:**     *To change comments: [Edit session settings](#)*

**Subject: Sastle 2\_test Mystery Shop Posting (Self Assign!): Retail & Rest. (Due : 06-15-04)**

This is an automated posting of SELF ASSIGN mystery shops offered by Sastle 2\_test. Receipt of this email does not indicate that you have been assigned any shops. You MUST be the first person to claim a shop BEFORE performing any shop.

Please do NOT reply to this message directly.

**TO CLAIM A SHOP:** Find your state/region/country among the "Available Shops" and click on its link.

**TO STOP RECEIVING SHOP OFFERS** from Sastle 2\_test:  
Please login at [http://sassledev.com/sassie2\\_test/shoppers/LoginShopper.php](http://sassledev.com/sassie2_test/shoppers/LoginShopper.php) and deactivate your account.

**COMMENTS:** Remember to Buy Blue Widgets !

**ADDITIONAL COMMENTS:** Please only accept this shop if you are willing to buy blue widgets and can definitely submit your report by 6/17.

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**Business Type/Name:** Retail & Rest.  
**Due Date :** 06-15-04  
**Shop can not be performed BEFORE** 05-28-04

**Available Shops:**

\* CA: Beverly Hills, Big Oak, Carmel, Cupertino, Goleta, Hollywood, Los Angeles, Mariposa, Monterey, Mullholland Falls, Napa, Pleasanton, Reseda, Rodeo, San Diego, San Fernando, San Francisco, Sonoma, Torrance, Trenton-> <http://sassledev.com/bnc.php?TP=1&ID=2092&AS=372&ST=5>

\* MA: Arlington, Attleboro, Boston, Centerville, Dorchester, Everett, Franklin, Lechmere, Malden, Marlborough, Needham, Osterville, Peabody, Roxbury, Rutland, Stoughton, Swampscott, Weston, Winchester, Worcester-> <http://sassledev.com/bnc.php?TP=1&ID=2092&AS=372&ST=20>

\* NY: New York ->

After selecting the send email option (and posting shops to the Job Board), you'll receive the following verification.

**CREATE SESSION**  
STEP 6: Post Shops

**JOB BOARD POSTING SUCCESSFUL !**

**The shops in this session are now immediately visible on the Job Board**

**THE SHOPPER EMAILS HAVE BEEN QUEUED!**

**The BEMS (BULK EMAILER SYSTEM) will immediately put all of your emails into a queue.**

**(You will receive a confirmation email when all messages are done).**

**BEMS typically takes about 30-45 minutes to send out 10,000 emails, depending on current volume.**

[View Other Sessions](#)

[BEMS Log \(Email Status\)](#)

[Return to Scheduler Main Page](#)

Your emails will go into the queue of the BEMS system (the Bulk Email Server system, a series of high speed servers dedicated to sending out shop posting emails), currently capable of sending 30,000 emails per hour. The BEMS system goes through each session in its queue, sending 200 emails from each session per pass.

This means your emails will begin sending quite soon – the time at which your emails finish sending is determined by the number of emails in your session (and the current number of sessions in the queue). The more emails in your session, the more passes it will take to complete sending all of your emails.

For a rough estimate on when your last pass of emails will be sent, click the “BEMS Log” button.

To continue working on other sessions, click the “View Other Sessions: button.

To Return to Scheduler Main Page, click the link that says ... well ... you know .... !