DEFINITION FOR THE STATUS OF EACH SURVEY

Created - This is a shop that has been created using the Manual Scheduler but has not been assigned to a shopper yet. This status will not be displayed to clients in the Client Shop Logs. **(ACCOUNT REPS WILL HANDLE)**

Open - This is a shop that has been created in the System using the Auto Scheduler but has not been assigned to a shopper yet. This status will not be displayed to clients in the Client Shop Logs. **(ACCOUNT REPS WILL HANDLE)**

New - A shop that has been created and assigned to a shopper but the shopper has not entered any data for the shop. This status will not be displayed to clients in the Client Shop Logs. **(ACCOUNT REPS WILL HANDLE)**

Incomplete - The shopper has entered data into the shop but has not completed all required questions on the survey. This status will not be displayed to clients in the Client Shop Logs. **(ACCOUNT REPS WILL HANDLE)**

Completed - The shopper has completed the shop by answering all the required questions but the shop has not been reviewed. **(SHOP IS READY TO BE PUT IN HOLD B)**

Excluded - This status is designed to be used for shops that need to be excluded from the client reports but should not be deleted so that this way they can be kept for accounting purposes.

When a reviewer and scheduler decide that a shop is no good for the client, then this shop will need to be excluded.

- If the shopper is to be paid then you will need to let the reviewer know that they will need to "Clone" (Clone: copies the shop, so that you can reschedule it) and change the status to "Exclude" on the shop and to go ahead and pay the shopper.
- If the shopper is not to be paid then you will need to let the reviewer know that the shop needs to be "Cloned" and "Dumped" along with unchecking the "Shopper Pay" box.

Hold A/Hold B –These are two 'holding bins' that may be used for various reasons. Please check with your manager/supervisor to learn if these hold options are at use within your company. The hold status will not display to clients in the Client Shop Logs. **(HOLD B: ONCE SHOPS ARE IN COMPLETED STATUS, ACCOUNT REPS WILL CHANGE THE STATUS TO HOLD BE FOR THE REVIEWERS TO REVIEW) (HOLD A: IF A REVIEWER HAS A QUESTIONS FOR THE ACCOUNT REP THE REVIEWER WILL PLACE THE SHOP ON HOLD A)**

Reviewed - The shop has been reviewed but not finalized. Clients do have access to see these records in the logs but are not yet able to view the shop results.

Finalized - The shop has been finalized and released for your clients to view the results.

Emailed - This status indicates that at some point after the shop has been finalized a link was emailed to someone using the Email Report in the top of the Client Shop View page or using the Report Distribution/Email Web Links page. **(CLIENT HANDLES)**

Client Finalized - Some companies have requested the option to perform an internal review prior to releasing the shop results to all managers. If you are using this feature, the log will display shops with status of Client Finalized for those that have had the internal review completed. **(THIS USED INTERNALY, CLIENTS THAT HAVE SHOPS TO BE PULLED IN ACCESS WILL BE PUT IN CLIENT FINALIZED TO SHOW WHICH SHOPS HAVE BEEN PULLED.)**

Locked - Scores may be changed after some surveys have been already submitted. If the survey and scoring is changed but the client does not wish that the existing reports change their scoring, the Locked status will prevent the scoring from being updated. **(OFFICE USE ONLY)**

Pending – On the shopper side of SASSIE, they may see that one of their shop is "Pending" which means that is in the process of being set up for payment.

Paid – On the shopper side of SASSIE, once the shop has been paid it will be marked "Paid"