Table Of Contents:

DEFINITIONS:

- **Batch:** List of prospects that share a common selection criterion for a specific job.

- **Dispositions - Call Result Types**
    - There are two categories of Call Results; Reached or Missed
    - **Reached:** People how were spoken with.
        - This includes final dispositions: terminate (TR), Over Quota (OQ), Complete/Scheduled (CO), Initial Refusal (IR), Qualified Refusal (QR).
        - It also includes Terminate and Save Screener/Hold (TSS) and Call Back (CB).
    - **Missed:** Missed calls are calls where the prospect could not be spoken with.
        - It includes, Answering Machine/VM (AM), Disconnect/Wrong Number (DS/WN), Busy (BZ), No Answer (NA).

- **Final Disposition:** A call to a prospect which should require no further calling such as TR, OQ, QR, CO, IR, DD (Deceased).

- **Household:** The part of a member profile that links members of a household together. Information in the HH profile, such as income applies to all HH members.

- **Individual:** The part of the member profile that is unique to the individual.

- **Member**: A person who registers in OpinionWizard to be a respondent.

- **Member Status:** The status which effects selection for research which are assigned to Individual and HH members based on record completeness and other factors.

- **Prospect**: a record created for the purposes of recruiting and individual.
    - This record link an individual to a specific Job and Batch.
    - This record tracks all communication with an individual for a study.
    - There are three ways prospect records are created:
        - Sample Select – When batches are created
        - Make Prospect – Manual single person creation (On The Fly - OTF)
        - Social Media Slug – Respondent self–creation prior screening survey (URL used to post jobs on social media)
    - **Prospect Creation Date (PCD)**: This is a call record which is created when prospect records are created. This record is viewable under the communication History on the prospect screen.

- **Prospect Status (pstatus):** Used to manage the recruitment life cycle of a respondent. This status is automatically adjusted by the system based on recruiting actions.
    - An individual can have one prospect record for each job/screener.
    - All live prospects for an individual are automatically disqualified when an individual is recruited for a study.

- **Prospect Disposition Screen:** Referred to as the prospect screen. This screen when where call results are entered. It also provides a list of all communication with the prospect and the ability to edit the HH and Indv profile for all Individuals in the HH.

- **Sample:** a term used for the lists (Batches) of prospects being solicited for participation in a project.

PUBLIC REGISTRATION

The OpinionWizard respondent database includes two public home pages from which people can register. One page focuses on consumers, the other — professionals. The registration process is similar, but the registration path is different.

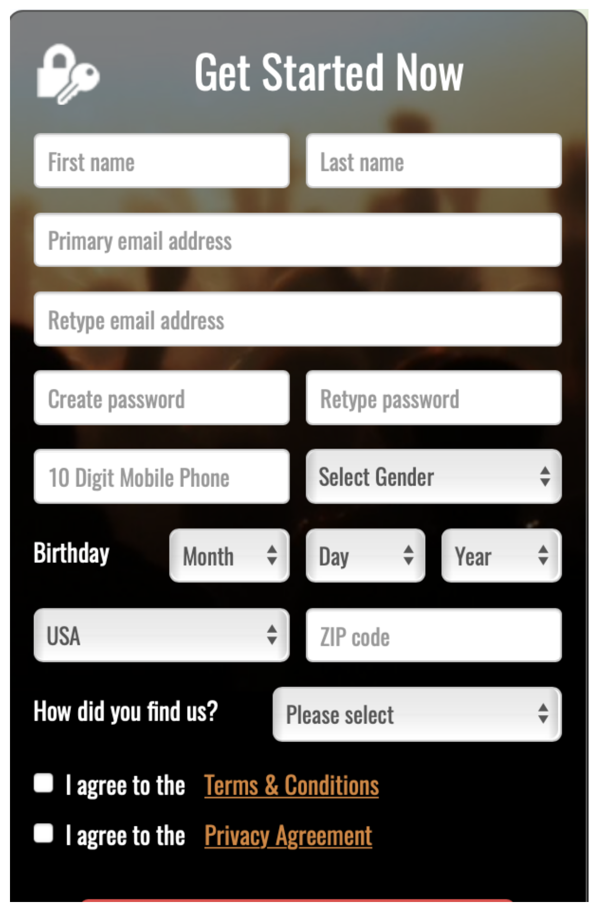
These style and brand of these pages were customized for your company. The messaging can be changed at any time using Website Messages under the Administrator tab→Company→website messages.

- Consumer Portal: *OW.YourCompany.com* is the consumer web address and the registration path is as follows:
  - Contact Information → Household Profile → Individual Profile → Repeat individual profile for others in the HH.
- Professional Portal: *OW.YourCompany.com/pro* is the professional web address, and the registration path is as follows:
  - Contact Information → Individual Profile → Repeat individual profile for others in the HH → Household profile (is optional).

Contact Information

Things to know about this page:
All fields are required.

- Email address:
  - Must be unique and can't be shared with other family members
  - Must pass a third-party validation for deliverability
    - Cannot be disposable or temporary (no student .edu address if age <25)
- Phone:
  - Must be mobile phone
  - Must pass third-party for carrier.
    - Some mobiles are not testable and will not be allowed unless confirmed as a valid mobile number by 3rd party
- First and last names can be 1 or more characters.
- Gender choices can be modified using lookup tables under the Administrator tab→Lookup→gender.
- Age: Must be at least **18** years old
- Zip Code: Valid US and Canada zips only
- Must agree to the terms and privacy statements.



Household Information (HH)

This page contains information on the household. It is not required during professional registration.

- Many field choices can be modified under the Administrator menu.
- Auto Brand and models must be maintained.
- HH attributes can be modified under the Administrator tab→Lookup→hh_attribute.
- Attributes can be set to collect quantity.
- HH address is verified and auto completed when street address is entered. At that time Geo coding is implement for Radius recruiting.

Individual Information (Indv)

There is no limit to the number of Individuals that can be added to a household.
Professionals can register for a consumer project.

The information collected on the individual page varies based on age, work status and occupation.

- Age:
  - All Indv under 18 and are assigned a Parent contact
  - Minors under the age 14 are asked minimal information
  - Age 14-17: are asked contact information (email and mobile phone), though this is not required.
  - Age 18+ see all questions

- Work Status:
  - Full time employed are asked Occupation and Industry questions.

- Occupation
  - Designated Occupations (adjustable under Admin→Lookup→occupation→Get company info) add collection of company information questions.

Household and Individual Status

HH and Indv Status:

- Households (HH) and Individuals each have a status.
- Status definitions are below:

Name		Descriptions
Paused	1	Used to segment records with bad emails/phones for further processing
Active	2	Record is complete enough for active participation
Inactive	3	They have decided to stop participating or contact is lost

Deferred	4	Temporarily inactive. Useful for a temporary break from participation
Blacklist	5	Members who are found to cheat or be a disruption
Deceased	6	
Temporary	7	Temporarily imported data provided by a client
Exclusive	8	Exclusive for a certain client research
Incomplete	9	Record is not complete enough to be elidable for participation

- **Incomplete:** When a person registers as a member and does not complete the process, their status is considered incomplete, and they will not be selected as a prospect for participation in studies by default. This status can be over-ridden.
- **Scoring:** HH and Individuals with a status of Incomplete are scored nightly. If their score reaches the minimum threshold (28 for HH, 34 for adults and 33 for minors) their status is automatically changed to Active, and they will now be selectable as a prospect for future studies. There's a set of points for each data piece: HH income – 25, housing type – 1, own/rent – 1, year built – 1, etc. Same for individuals: phone number – 10, first name – 5, last name – 5, gender – 5, birth date – 5, email address – 1, language – 1, etc.
- Incomplete Individuals are automatically sent messages encouraging them to complete their registration.
    a. Exception: Professional respondent, those with occupations deemed to be professional, are not required to complete the HH registration page and are not sent Incomplete email messages.
    b. If other members of the same HH as the professional are considered consumers, they will receive emails encouraging completion of their registration.

RECRUITING

Recruiting (Batch)

During Batch Recruiting prospects in a batch are presented for dialing, disposition and updating.

- Working Inbound Batches presents only prospects that have passed the Web survey (WPQ).
- Working Outbound batches prospects are not pre-qualified, so all prospects without a final disposition are presented.
- Records are presented in the following priority order:
    1. Scheduled callback appointment that are due
    2. WPQ Prospects that have never been called
    3. WPQ Prospects that have been called before but whose GAP setting has passed
    4. Prospect that that have been called before but whose GAP setting has passed
- Upon disposition, the next prospect record is presented for calling.
- Dispositioning – Changing Prospect Status

Disposition code	PStatus changes to	Email Sent
PCD-Inbound	-2	Web-Survey Project Invitation Sent
PCD-Outbound	0	Project Invitation Sent
WPQ	0	None
AM/BZ/NA/CB	1	None – Batch Resend remind to call
IR	2	None
TR	2	37 – Thank You - Terminate
OQ	2	38 – Thank You - Standby
TSS	2	39 – Thank You - TSS
CO	4 (3)	3 if Job set to Audit Required
AU	4	Confirmation Sent
CF	5	When Prospect Confirms
RM	6	When Prospect Confirms Reminder

- **Terminating:** If a prospect terminates during the web survey or over the phone, their prospect status is set to 2 which means they disqualified (WTR/TR) and the last question ID is recorded in under in the communication record and they will not be presented for batch recruiting.
- **Over Quota:** If a prospect is found to be Over Quota during the web survey or over the phone, their prospect status is set to 2 which means they disqualified (WOQ/OQ) and the last question ID is recorded in under in the communication record and they will not be presented for batch recruiting.
- **Terminate Save Screener (TSS or Hold):** If a prospect is found to be TSS (a terminate point that may change) during the web survey or over the phone, their prospect status is set to 2 which means they disqualified (WTS/TSS) and the last question ID is recorded

in under in the communication record and they will not be presented for batch recruiting.

Understanding GAP

Missed Dispositions (NA/AM/BZ) will set a callback date for the prospect based on an established GAP interval set in the Call Result Table.

- *Standard schema is that CB will set to current time + gap (in minutes)*
- *If this time is within 30 min of office day close, then CB will be in tomorrow open time (if today is Friday, then on Monday office open time)*
  if CB trying to set before office open time, then it will be set at open time

PROSPECT CHANGE FROM CO TO AU

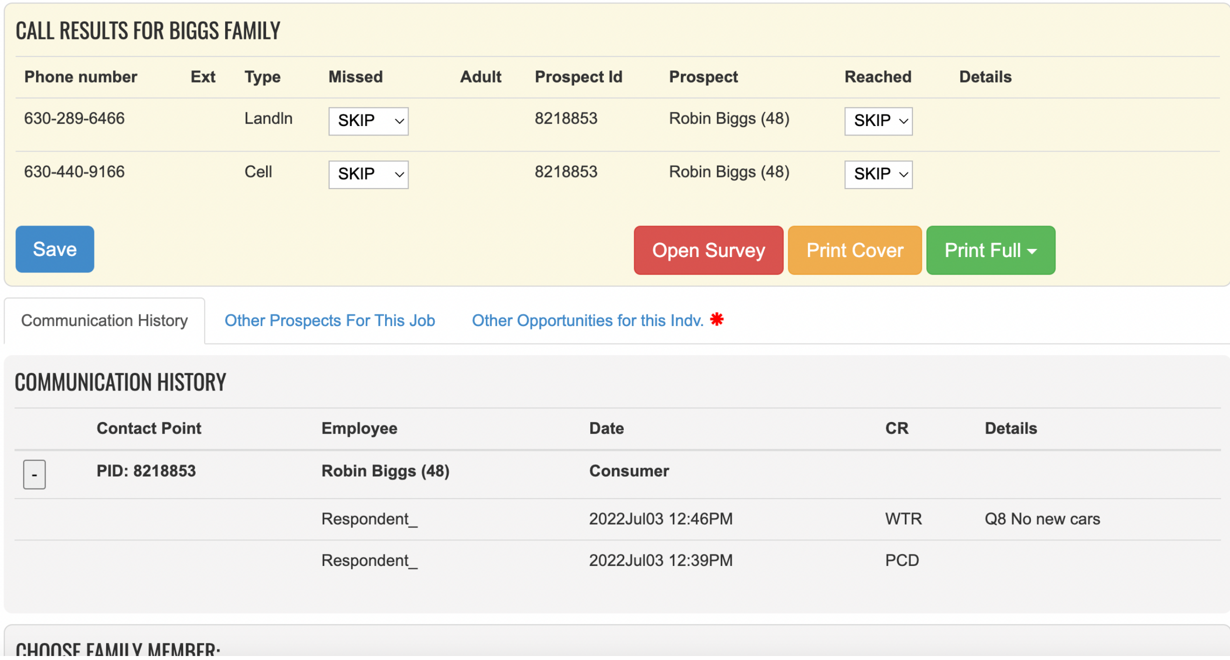
Since we no longer audit and for automatic confirmation to work, job set up now has an option to Require Audit which by default is not selected. This means when prospects are recruited (CO) they are recorded with a status of 4 (AU) not 3 as typical with CO. This means they are audited from the start. However, there is no call record showing that the prospect was audited because they were not manually audited.
Checking the Audit Required box will disposition prospects as status 3 (CO) and automatic confirmation will not be sent until prospects are updated to Audit status.

The attendance report will show AU upon recruit.

For automatic confirmations to work during job setup the automatic confirmation check box and the automatic reminder check box must be checked.

We could make automatic confirmations and automatic reminders the default setting as well.

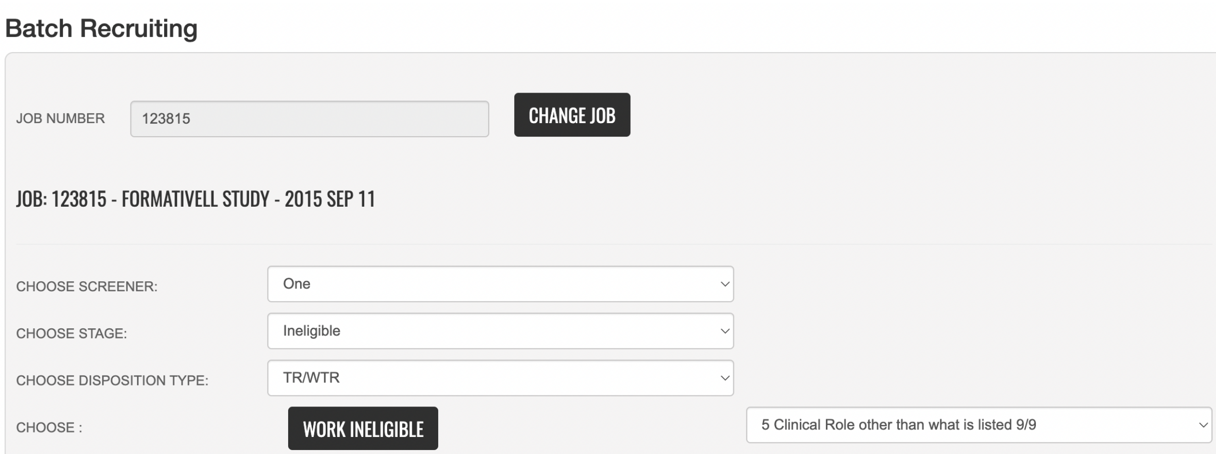
If *Audit Required* IS checked, the system will record COs as a status 3, not 4. For automatic confirmations be sent, either an interviewer must disposition each prospect as AU, or a supervisor must use the audit tool to update prospects from CO to AU.



SAMPLE DISPOSITION SCREEN

<u>Recruiting (Ineligible)</u>

- This allows employees to target prospects that disqualified or Refused participation for a project in the event of project changes.
- Enter Job number and Call Result Type (WTR/TR, WOQ/OQ, WTS/TSS, QR) and the Question number. The *W* designation (Web, e.g., WTR/WOQ/WTS) means the results was recorded during the online survey. No *W* (e.g., TR/OQ/TSS) means the disposition was recorded by a recruiter during a phone call.
- Prospects are then presented for calling.



Callbacks and the Callback Ticker

- **Setting:**
  - Callback appointments can be set by recruiters using the disposition code **CB** or by respondents when they prequalify (WPQ) via and web survey. Auto callbacks are set by system in case of a “Missed” call result (AM/BZ/NA) based on the Call Result GAP value.
  - Appointment times limited based on the setting under Admin.
    - Operating Hours, less 15 minutes of closing.
      - System will not show times outside hours of operation
      - System will not allow callbacks more than 3 days into the future.
    - Limited based number of Callbacks per 15-minute intervals
      - Full time slots will not be shown
      - Default setting is 4 appointments per 15 minutes
      - This should be adjusted based on staff size
- Prospects with a Callback time automatically be presented to employee working in the Job/Batch for that prospect. If no one is working the job and batch callbacks will be missed.
- **Callback Report:** Show daily appointments and can be used to schedule employees.
- **Callback Ticker:**
  - Because you may not have an employee working every project when callbacks are due, OW contains a Callback Ticker.
  - The ticker is a running list of clickable links that runs across the top of every prospect screen showing the job # and time for each prospect with a pending Callback appointment.
  - Callbacks links will only be displayed if the prospect is in an active job/batch.
  - Clicking the link opens the disposition for that prospect.
  - There are two rows, CB Due and CB Past Due
  - CB Due are callback appointment that are up to 15 minutes past due.
  - CB Past Due are over 15 minutes late. These will remain on screen for the remainder of the shift or until dispositioned.
- This tool is important because prospects with callback appointment will only be presented to those recruiting for that job/batch. If no one is working that batch, then call backs can be missed without this feature.
- There is a daily Callback Report that can be printed.
  - This report lists callback appointment chronologically by Job.

Changing Dispositions

In general dispositions once saved cannot be changed. However, there’s a 180 second interval for the last save, when a new disposition can be entered and saved. This new disposition will be treated as replacement for the recent disposition.

Database Maintenance

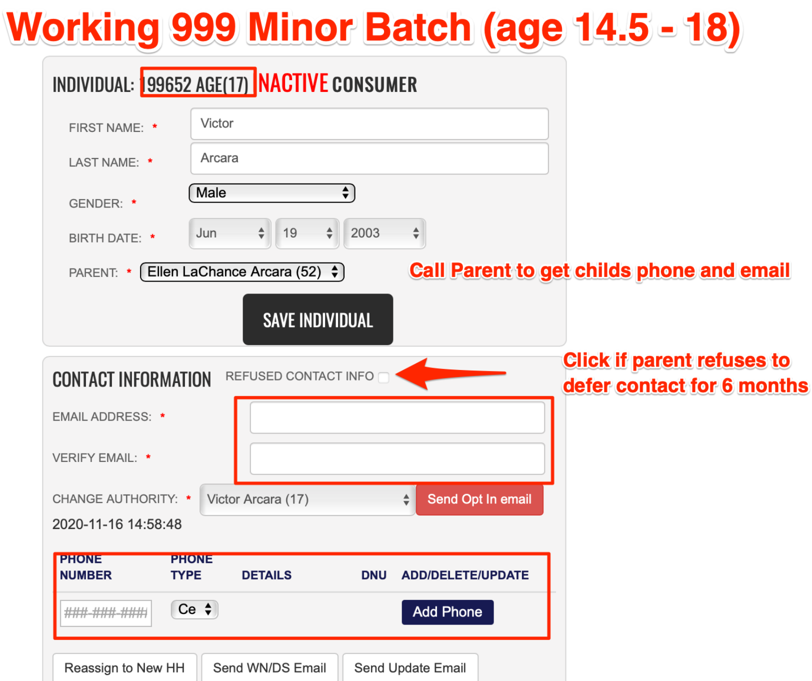
- Respondents can directly update their household and individual records at any time
- Recruits can and should update any red box missing information every time they speak with a prospect.
- Unresponsive and inactive individual and households can be deleted from via tools found on the admin menu
- Respondents can also be pursued for updates via the Batch Recruiting system using the Update Tracking Job #999

Update Job #999

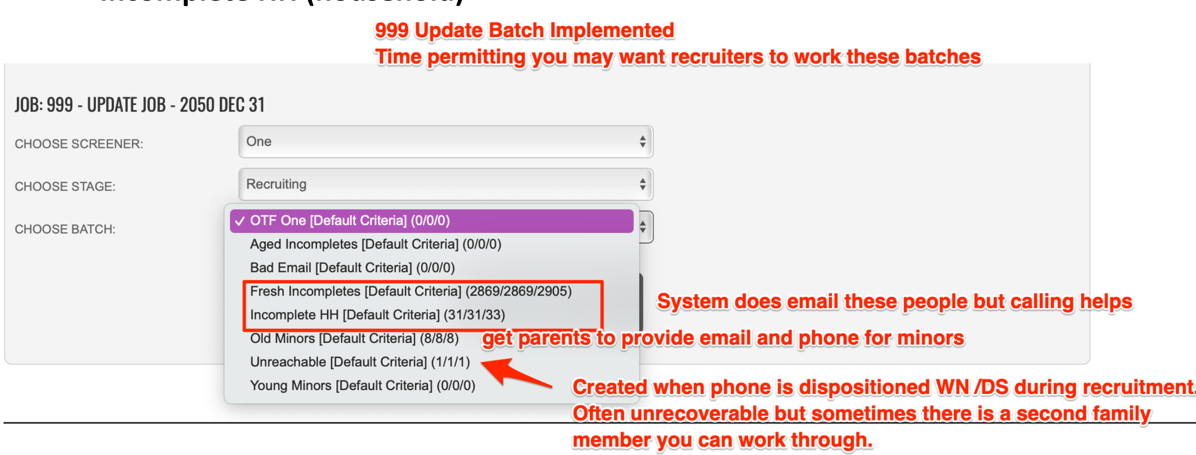
Growing the database membership is vital to a successful recruiting company. The Update Job is instrumental to its growth. Respondents are placed into one of several purpose-based batches under Job 999, the Update Tracking job. These batches can be worked just like recruiting batches where recruiters call through and disposition results. All update batches are:

- **Fresh Incompletes –** Respondents that have not completed registration after 7 days are automatically placed in this batch. During the first 30 days they are sent an email encouraging them to self-complete their registration. Respondents stay in the Fresh Incomplete batch for up to 30 days from their registration date unless they complete their registration. If they are still incomplete after 30 days, they are moved to the Aged Incomplete batch.
- **Aged Incompletes -** Respondents that have not completed the registration after 30 days. Respondents are automatically placed in this batch 30 days after they began registration. They are sent a different email than the message sent to Fresh incompletes. They stay in this batch until registration is completed either over the phone or by the respondent online. Or their registration is deleted form the database.
- **Young Minors –** When minor children that reach the age of 14.5, they are placed in this batch so that recruiters can all to collect email and mobile phone numbers. They stay in this batch until they have been updated or refused to provide the information. Refusal to provide contact information expires after 6 months, at which time the minor will

rejoin this batch or the Old Minor batch until contact information is collected.

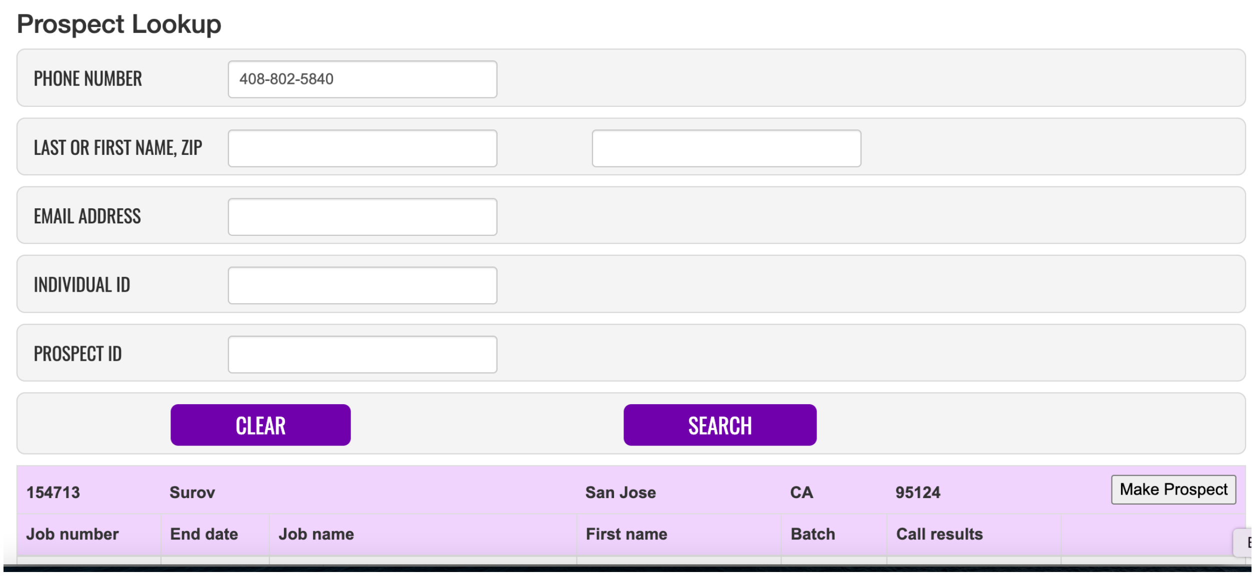


- **Old Minors –** When minor children with no direct contact phone or email reach the age of 17yr-9mo they are placed in this batch so that recruiters can all to collect email and mobile phone numbers. They stay in this batch until they have been updated or refused to provide the information. They will return to this batch 6 months after the refusal date of contact information has not been added.
- **Unreachable –** These prospect records are created during recruiting when a phone is dispositioned as Wrong Number or Disconnect (WN/DS). An email message is automatically sent.
    - These respondents are often unrecoverable. However, you may be able to work through other HH members if present
- **Incomplete HH (household) –**



Prospect Lookup

When prospects call in, they can be looked up using the prospect lookup tool.

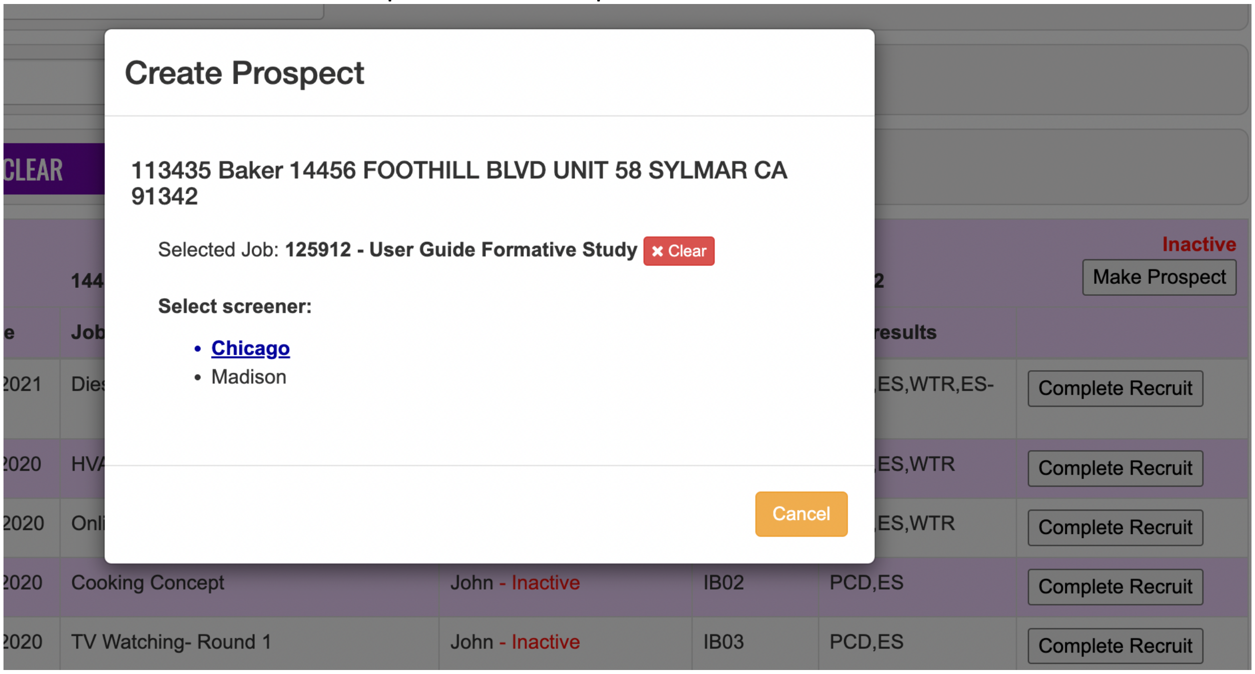


This is tool allows the user to find prospect based on any of the following search parameters: Phone #, (Last Name + First Name or Zip), Email, Individual ID, Prospect ID.

- If more than one Household is found a list of matches is presented in ascending HH # order below the search box.
- Within each household, prospects are presented in reverse chronological order (newest on top).
- Since the most current prospects are at or near the top of the list it is easy to find the correct prospect record.
- Each prospect listing includes the Job #, Job end date, Job name, prospect First name, the Call results – an abbreviated summary of the communication history, so the user can find the correct prospect and access whether they are eligible to be screened.
- If the prospect has already terminated or is no longer eligible it is clearly identified and there is no need to open the prospect record.
- It also shows the results of the prequalification survey, WTR - Terminated or WPQ - Prequalified
- If the prospect is eligible to more forward, clicking on the prospect listing opens the prospect disposition screen

113435	Baker	14456 FOOTHILL BLVD UNIT 58	SYLMAR	CA	91342	Inactive Make Prospect
Job number	**End date**	**Job name**	**First name**	**Batch**	**Call results**	
125538	28-Jan-2021	Diesel	John - Inactive	IB01	PCD,ES,WTR,ES-RM	Complete Recruit
125496	19-Oct-2020	HVAC	John - Inactive	IB01	PCD,ES,WTR	Complete Recruit
125467	11-Sep-2020	Online Retail	John - Inactive	IB05	PCD,ES,WTR	Complete Recruit
125428	26-Jun-2020	Cooking Concept	John - Inactive	IB02	PCD,ES	Complete Recruit
125429	26-Jun-2020	TV Watching- Round 1	John - Inactive	IB03	PCD,ES	Complete Recruit
125427	19-Jun-2020	Hearing Aid Research	John - Inactive	IB02	PCD,ES	Complete Recruit

Make Prospect: There is an option at the top of each Household header to Make Prospect if none exists and it within acceptable business practices to do so.

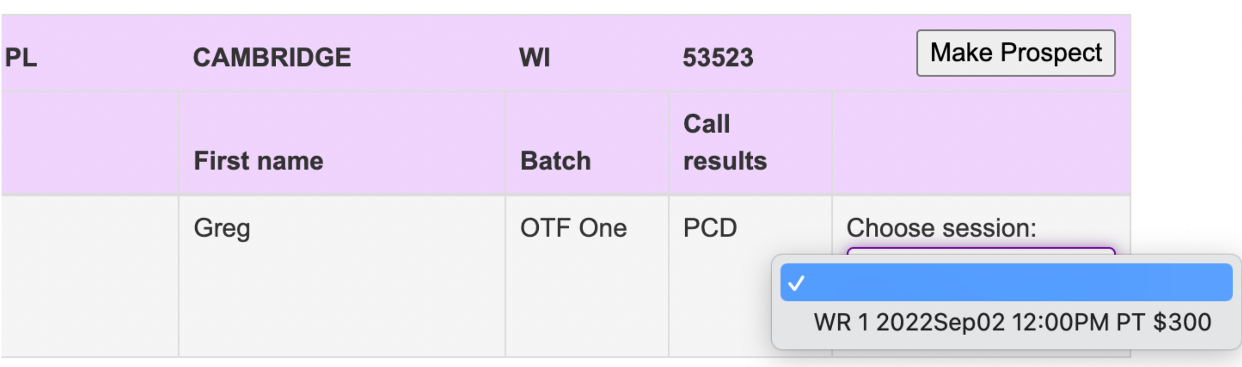


To make a prospect:

1. Enter an active job number with and end date in the future.
2. Select screener
3. Select Individual - If a prospect of the Individual does not meet the past participation requirement for that project.

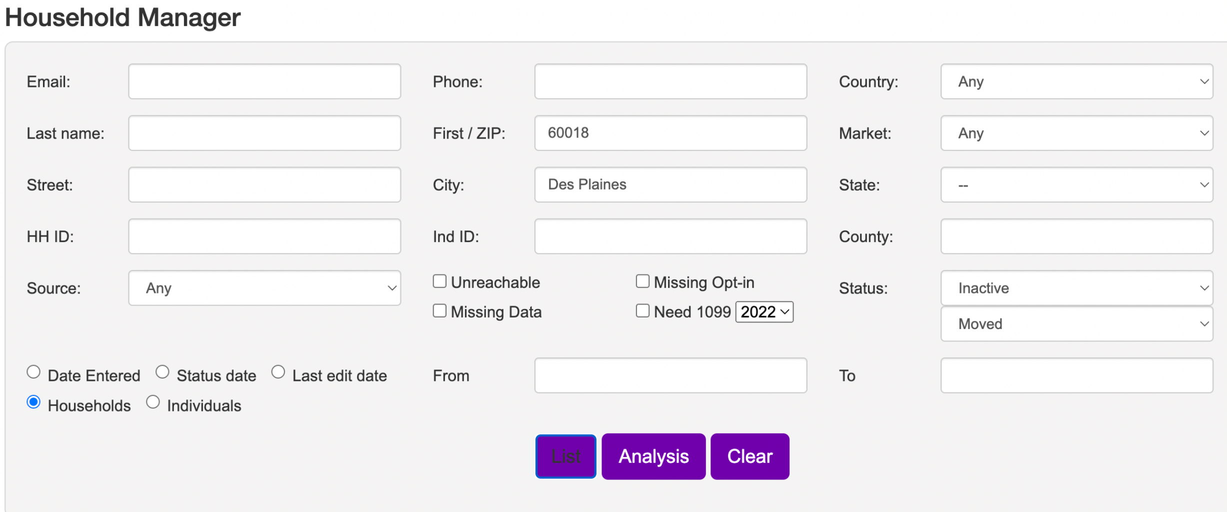
Prospects created this way will be added to the OTF (**O**n **t**he **F**ly) batch.

Complete Recruit: Manager level employees and above also have this option. It allows the user to Book into a session and prospect though this not advisable. It is better to bring up the prospect screen and use the disposition tool to CO, complete the recruit and select the session. The benefit of the **Complete Recruit** button is that it allows a user to schedule a prospect into a session even if quotas are full.

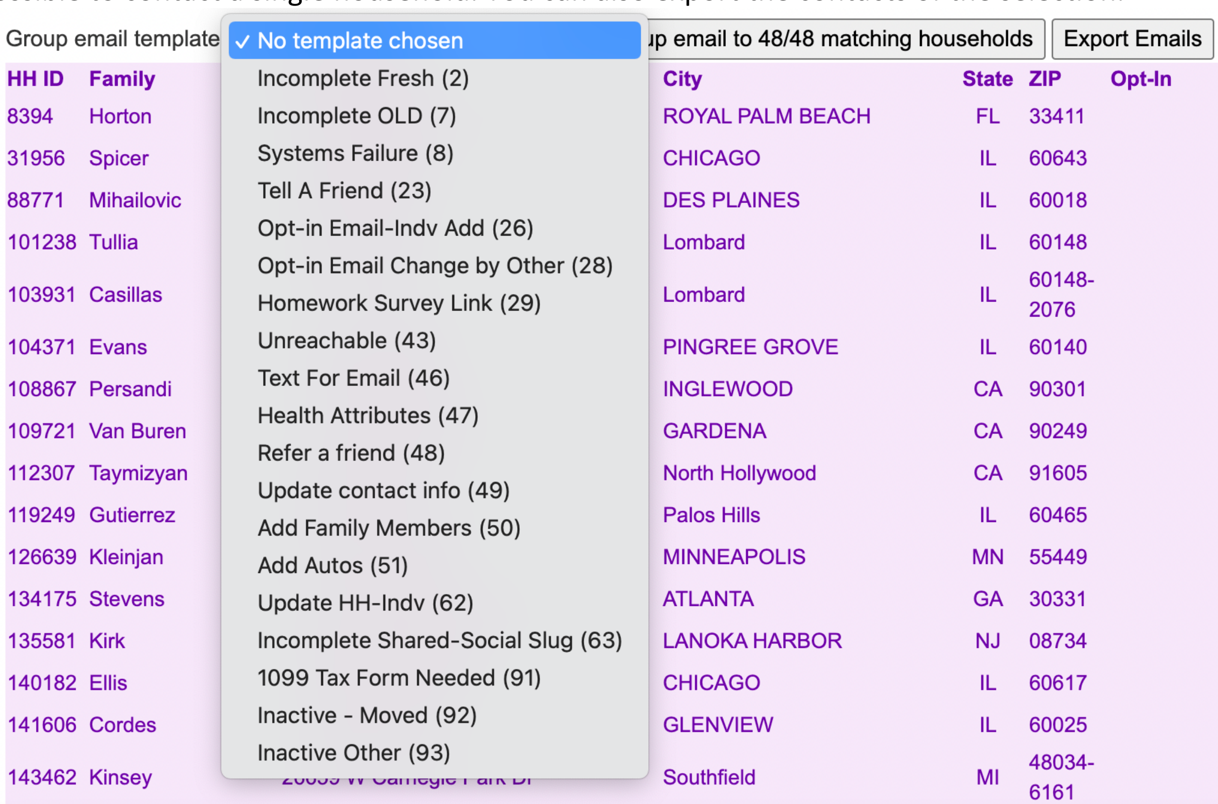


Household Manager

This tool gives employees a powerful household/individual search capability including various filters including email address, phone number, HH ID/Indv ID, geographics, status, last edited date/entered date, etc.



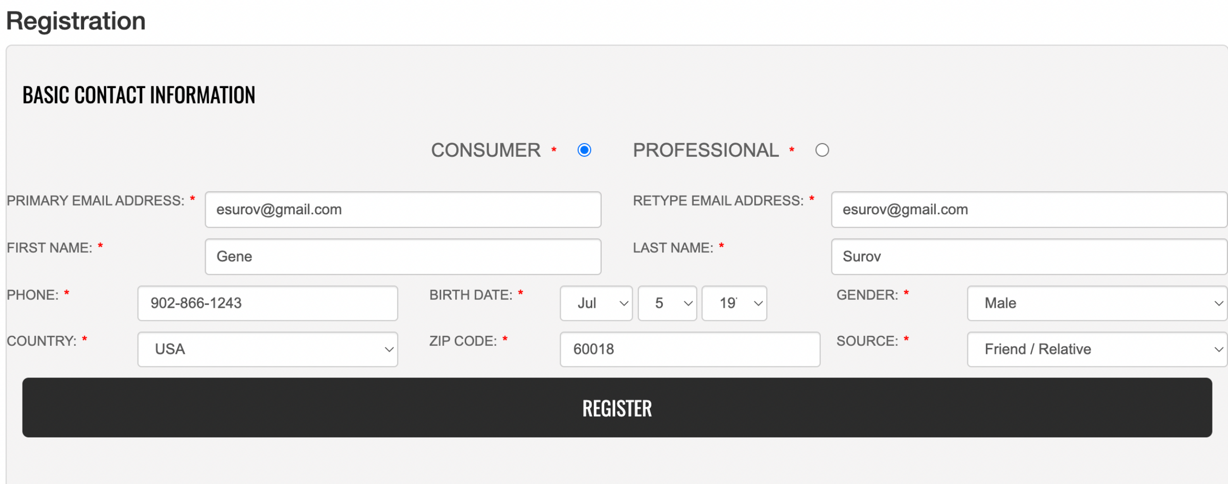
The search results are the households with HH ID, Family name, mailing address. Matching HHs could be easily reached out with a mass email based on a chosen email template. It's also possible to contact a single household. You can also export the contacts of the selection.



A quick mouseover tooltip shows all the HH members and provides navigation to selected Indv.

Register

Register is a handy tool to register new households/individuals in the OW system. It's a copy of public facing register feature on the homepage, but for employees. It could be used for an on-phone registration. Employees have a flexibility of overriding some rules like .edu email address or failed 3rd party email/phone number validation.


Registration

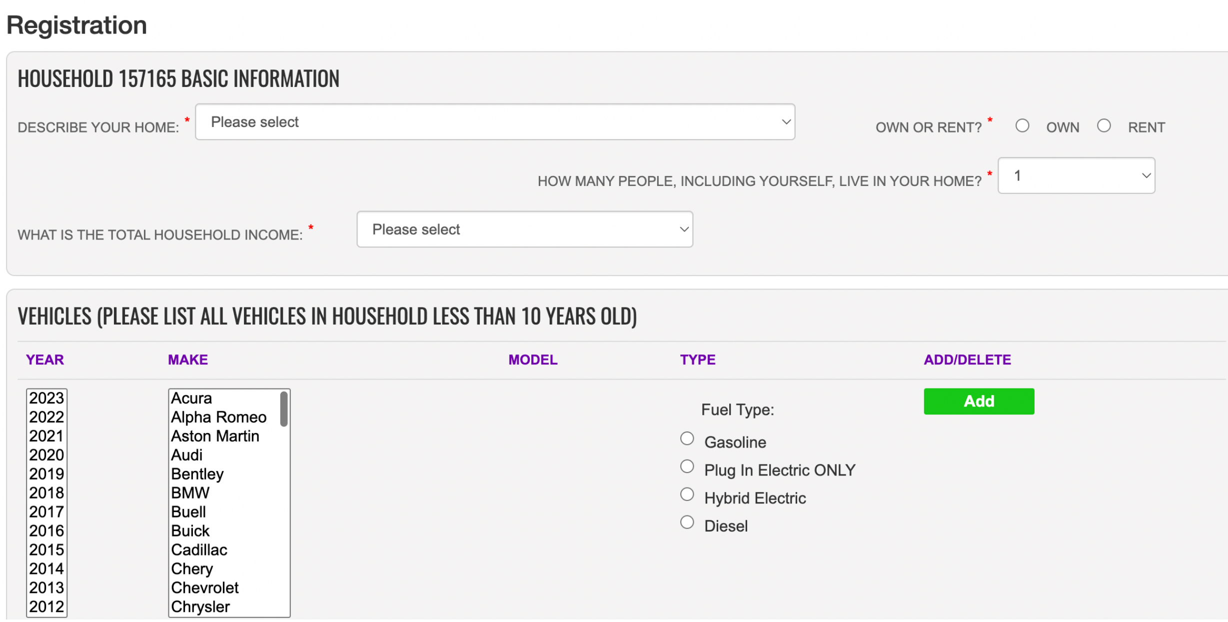
BASIC CONTACT INFORMATION

CONSUMER * PROFESSIONAL *

PRIMARY EMAIL ADDRESS: * esurov@gmail.com
RETYPE EMAIL ADDRESS: * esurov@gmail.com
FIRST NAME: * Gene
LAST NAME: * Surov
PHONE: * 902-866-1243
BIRTH DATE: * Jul 5 19
GENDER: * Male
COUNTRY: * USA
ZIP CODE: * 60018
SOURCE: * Friend / Relative

REGISTER

Household creation process consists of 3 steps: basic info, HH details and Individual. Upon submission of all the 3 steps user gets to the HH manager – Household Edit page.


Registration

HOUSEHOLD 157165 BASIC INFORMATION

DESCRIBE YOUR HOME: * Please select
OWN OR RENT? * OWN RENT
HOW MANY PEOPLE, INCLUDING YOURSELF, LIVE IN YOUR HOME? * 1
WHAT IS THE TOTAL HOUSEHOLD INCOME: * Please select

VEHICLES (PLEASE LIST ALL VEHICLES IN HOUSEHOLD LESS THAN 10 YEARS OLD)

YEAR	MAKE	MODEL	TYPE	ADD/DELETE
2023 2022 2021 2020 2019 2018 2017 2016 2015 2014 2013 2012	Acura Alpha Romeo Aston Martin Audi Bentley BMW Buell Buick Cadillac Chery Chevrolet Chrysler		Fuel Type: Gasoline Plug In Electric ONLY Hybrid Electric Diesel	Add

Household creation is a part of Register process. After inserting the Indv basic information user gets to the HH creation step including housing details, incoming information, vehicles, HH attributes questions, mailing information and HH internal information block.

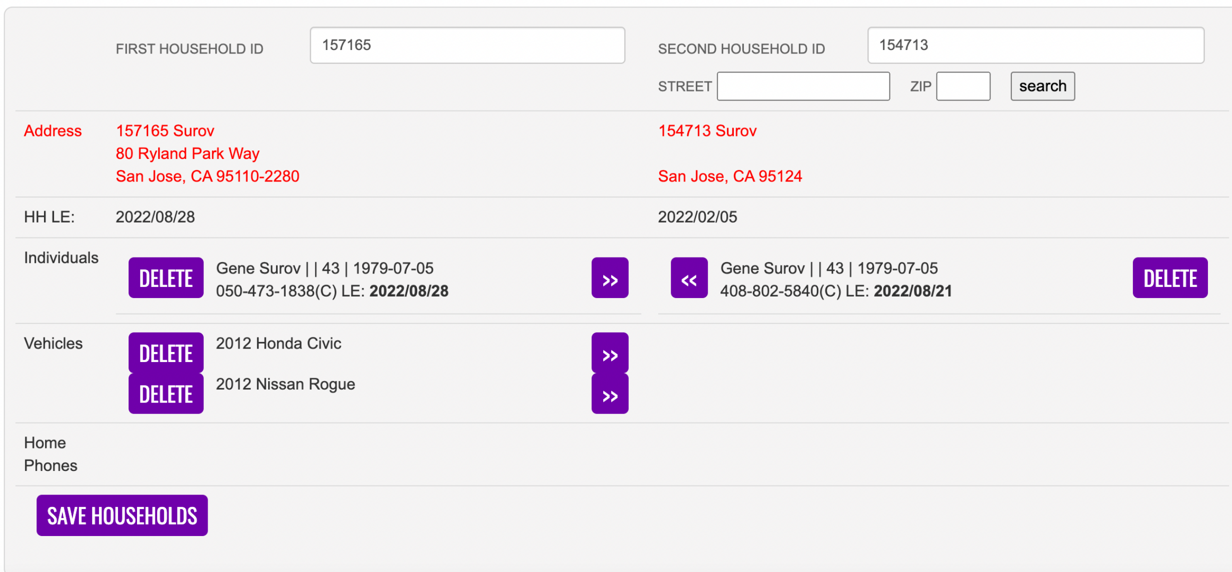
HH details input step is followed by Indv. Information including employment, Indv. Attributes, preferences, travel area and internal information block.

An optional further step is addition of other HH members as potential respondents.

Reassign Individuals

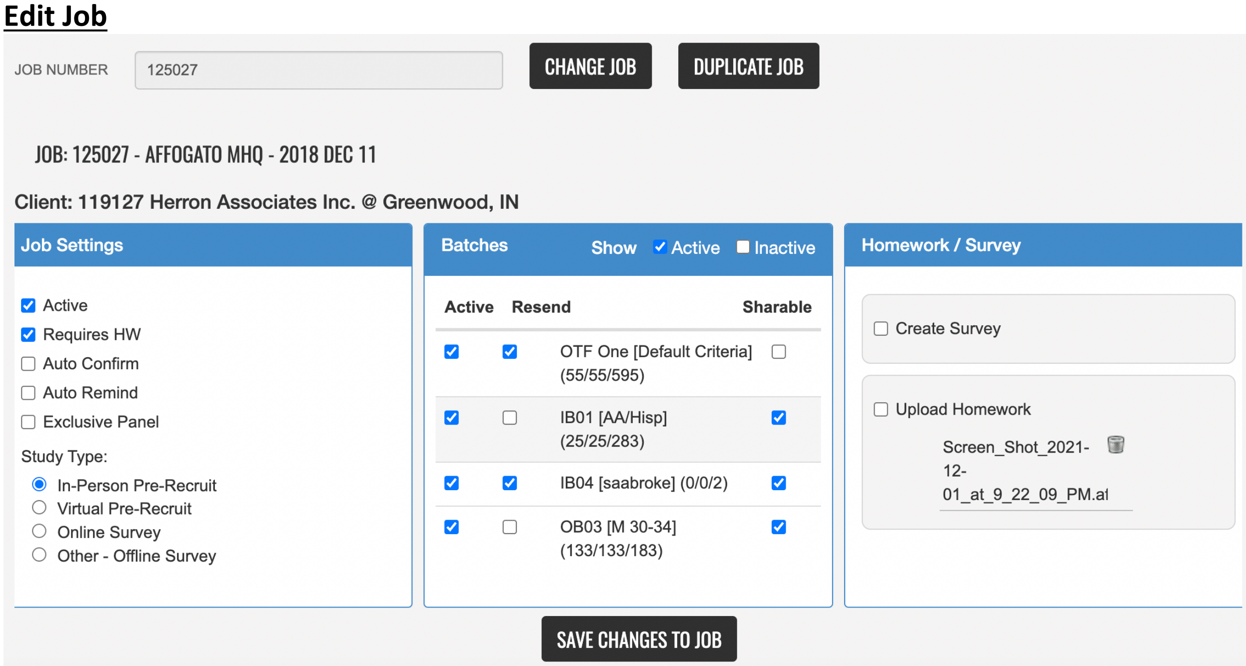
Often it happens that individuals move house leaving their old Household. Either minors grow up and move out or partners separate. To not delete and recreate an individual under a new HH address this tool facilitates this situation. To use it, a pair of HH ids required: source and destination. Destination HH ID could be got via an in-place address search. Individuals could be moved from one HH to another (or deleted). Vehicles could be moved (or deleted) as well.

Household Reassign Individuals Page



MANAGE

Edit Job



Job Setting

- Active: Mark a job "Active" by clicking the check box
    - This allows you to have access to reports and sample for the job
    - Uncheck the box deactivate the job
        - This disables access to reports and sample runs
        - It prevents respondents from taking survey
- Requires HW:
    - Indicates that the job has homework (HW) that will be uploaded and attached to selected sessions. HW could contain file attachments, web surveys or both.
- Auto Confirm:
    - When checked, the system will automatically send email/text confirmations at 9pm daily to prospects who have an Audit status and have not yet received a confirmation message.
- Auto Remind:
    - When checked, reminders (email/text) are sent as follows:
        - Stage 1 (No reminder sent yet): 24 hours before session time
        - Stage 2 (1 Reminder sent): Second reminder
            - 4 hours prior to sessions that are at 11am and later
            - 2 hours before session times that start earlier that 11am
- Exclusive panel
    - When selected the job uses only the respondents from the exclusive client's pool. These respondents' data are provided by client and could be used for his/her jobs only.
- Study type:
    - In-Person Pre-recruit — studies that require an in-person meeting in one of the research venues (defined for each session separately)
    - Virtual Pre-recruit — instead of face-to-face meetings uses video calls. A for a zoom call provided in the session details.
    - Online Survey — completely online study, doesn't have sessions.
    - Other – Offline Study — special type of jobs, managed offline.

Batches (controls)

Batch list is loaded when a screener is selected. Since job can have more than one screener and batches belong to a certain screener, to not mix up batches together the list is displayed for each screener.

Active

- When checked the batches are available:
    - Add sample to
    - Recruiters to dial through
    - Prospect can access surveys
- Deactivate a job stops all activity, emails, recruiting, sample select
- There's a filter on the batch status on top of the block: [x] Active [ ] Inactive. Inactives are hidden by default.

Resend

- Batches will appear after running sample (see Sample Select)
- When checked, the system will automatically resend take survey emails to any viable people in the batch.
  - "Viable prospects" being people who have not yet responded to the ES-RM (Electronic Solicitation Reminder) emails, or who have WPQ but have not called in to finish the screening process
- Resend schedule is set in the Lookup tables Batch Resend Schedule:
  - There are two types of Schedules: IB-In Bound and OB-Out Bound
  - Each Stage in the schedule can have a different message
- As quotas fill batches can be deactivated. When Active Status is unchecked (deactivated) the following happens:
    - A communication result of EbC (E Batch Closed) will be recorded
    - The system sends an email, Quota Closed ID64 to WPQ prospects
    - The Prospect Status does not change so the batch can be re-Activated so these respondents can be called again
  - Closed batches prevent prospect from taking the screening survey. It tells them the project is closed.
  - It frees up limited appointment time slots by not counting WPQ prospects with callback appointments.
  - CB appointments for closed batches are not presented in the Callback (CB) ticker.
  - WPQ prospects will no longer be sent reminders to call-in.

Sharable

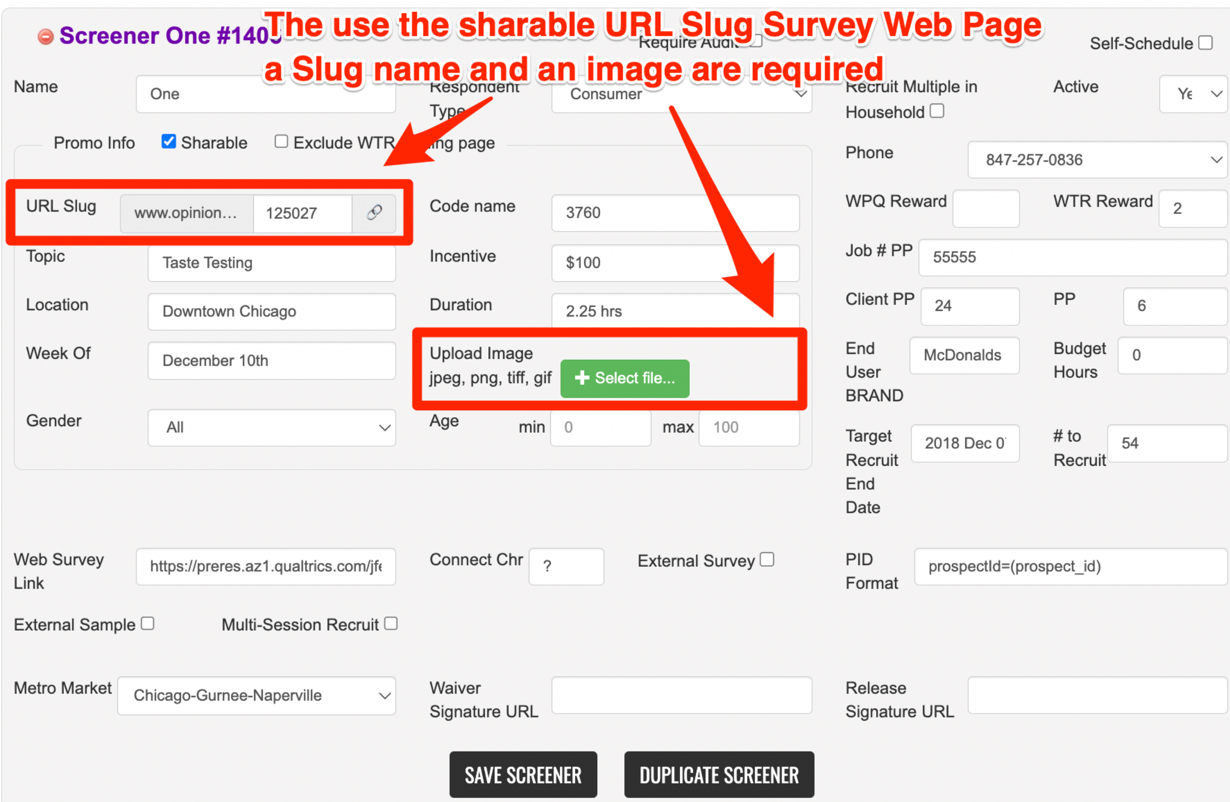
- When prospects are sent a survey link it is a single use link unique to them can be shared.
- If you want to include a sharable link in the Survey Opportunity email ESOL, the Sharable box for that batch must be checked. This status is established when using Sample Select.
- You can start of stop the sharable link by checking or unchecking this box.

Homework / Survey

- There are two types of homework:
  - File upload
    - Any necessary homework per job can be Uploaded using this section
      - You can either browse and select files or drop your files in the gray box
      - Click upload after selecting each file
    - All files uploaded will appear listed under "Uploaded Files"
    - Once homework is uploaded, all files will appear listed under each session
    - Select which homework file(s) to attach to the session and they will be attached to confirmation emails

- Survey HW
  - One or more HW surveys could be created for a job
  - Note, unlike other web surveys this one does not have quota or termination points
  - Also, it does not belong to any screener
  - To create a HW survey a name shall be given to it
  - Clicking Edit button next to its name will take you to Precision Survey / HW Survey edit page where all the questions could be added
  - All HW survey links will be available under a Session form for selection
  - Selected HW Survey links will be sent to respondents in email 29 - Homework Survey Link
  - HW Surveys could also be deleted by clicking a Delete button next to HW survey name

Screener Section



- **Screener Name:**
  - If there is only screen you can use a simple name like One.
  - If there are more than one name, do not use One and Two. Use descriptive names like Consumer and Professional so recruiters can easily identify which one to select.

- **Respondent Type**: Consumer, Professional, Both or Online. This will affect which respondents are selected based on the Individual respondent type established during registration.
- **Require Audit:** Checking the Audit Required box will disposition prospects as status 3 (CO) and automatic confirmation will not be sent until prospects are updated to Audit status.
- **Self-schedule:** If checked, respondents can check themselves into sessions from the landing page after being WPQ'ed
- **Recruit Multiple in Household:** Select if you want to recruit more than one person in the HH. The system by default prevents this.
- **Active:** You can deactivate a screener. A rare possibility.
- Promotional Page:
    - Clicking **Sharable** Default allow you to describe and post a project description page. Unclicking the **Sharable** box disables the page and hides all setting information.
    - **URL Slug** is used to share a promotional page that has link to the survey. It can be used by non-members to register and take the survey and members who have not been selected as prospects for the project to login, creating a prospect record and take the survey.
    - The **Shareable** feature is not active unless
        1. A **Slug Name** is entered
            - This can be anything not used before. We suggest using the job number.
        2. An **Image** is uploaded
            - The image should be relevant to the project topic. Then save the screener

- **More on the URL Slug:** This URL can be posted on social sites and is included in emails sent to prospects to share with friends. It is a great tool for building your database.
    - Non-members can access the survey by filling out the one-page registration form.
    - Members can access the survey by logging into their account
        1. During the login the system tests for past participation and blacklist occurs during login and prevents prospect creation and survey launch if they fail either test.
        2. If they pass an OTF prospect is created, and survey is launched.
- **Exclude WTR landing page:** If checked this job won't be shown on the WTR landing page. The purpose is to reduce wasted OTF point rewards. This will still allow sharing to work on social media posts and share with a friend via email, but it will no longer advertise on the WTR landing page.
- **Phone:** Screener contact phone number for incoming respondents calls. This number is communicated to the respondents as a callback phone number.

- **Code name:** Screener Code Name is used for communication on the phone with the respondents. Usually, it's an extension number used on the phone conversation to route the call to the right screener.
- **Topic:** Short description research topic e.g.: *Skin Care, Frozen Food, Real Estate, etc.*
- **Incentive:** Compensation paid to respondents for successful job participation. Used as a reference. Actual compensation is specified for every session. Could have *Varied* as a value. For online study type jobs shall have a precise value as they don't have sessions.
- **WPQ Reward:** If specified, respondents get rewards points upon being WPQ-ed. Usually for paid jobs it's empty (no reward points).
- **WTR Reward:** If specified, respondents get this amount of reward points as a compensation for participation. It's common practice to reward **2 points**.
- **Location:** Approximate location of the study. Could be Virtual or city name. Precise session location is specified in the session details.
- **Duration:** Approximate duration of the session. Gives a general idea to respondents how long it could take. If sessions are of various duration, then *Varies* could be a good value for this field.
- **Job # PP:** Comma-separated list of past participation job numbers to exclude from this study. In other words, all the respondents who participated in the listed jobs shall be excluded from this job.
- **Week Of:** First day of the week when the study is held. E.g.: Feb 28th.
- **Upload Image** (for URL Slug web page): When Sharable is selected, an image upload is required. This image shall be relevant to the screener study topic and is shown on the URL Slug web page. To upload an image, click **+ Select file** button and choose an image file for upload. The upload is immediate, a confirmation window appears on successful upload and a thumbnail size image is shown on the page next to the button.
- **Client PP:** If specified number of months of past participation for this client, all the respondents who took part in this client's studied within the last N months will be excluded from this study. In most cases it's 12 months.
- **PP (general):** Past Participation during the last N months. This field accepts an integer value: months for exclusion of respondents who participated ANY study within the given months period. Typical values: 1, 3, 6, 12 (1 year).
- **Gender:** Drop-down with gender selection (All, Female, Male). This allows to prevent people from taking the survey when they are of the wrong gender. Thus, it saves rewards points on the OTF prospects created via sharing the Slug link.
- **Age:** Age (min, max) Demographics for the sharing box. This allows to prevent people from taking the survey when they are of the wrong age. Thus, it saves rewards points on the OTF prospects created via sharing the Slug link.
- **Web Survey Link:** A link to Web Survey, could be either PS link or any other platform (if client provides his own web survey platform e.g., Qualtrics or SurveyMonkey). The PS link will be filled in automatically upon survey publishing (switching to Live mode).
- **Connect Chr:** A character used to join the web survey link with the PID format part. Depending on number of parameters in the URL it could be either a question mark "?" (0 parameters) or an ampersand "&" (one or more parameters in the URL). When a Web

Survey URL link sent to the respondent, we concatenate the base URL from the screener + connect chr + PID format with replaced [prospect_id] placeholder. For example, let's say the screener has the following params:

- **Web Survey URL:** https://ps.opinionwizard.com/public-survey?public_link=5cd423a70859baec3d71939479af001a
- **Connect Chr:** &
- **PID format:** prospectId=(prospect_id)

In this case if we have a PID value 12345 the resulting URL would be:
https://ps.opinionwizard.com/public-survey?public_link=5cd423a70859baec3d71939479af001a&prospectId=12345
Please note that Connect Chr could contain any value depending on the case. The default value could be changed in Administrator → Integrations → Connector Character

- **External Survey:** If checked we use our DB members and direct them to a different survey system. Upon conclusion of the survey, the other platform redirects them to our system to disposition as TR, OQ or CO. In this case some of the OW-PS integration points are disabled.
- **End User BRAND:** The end user BRAND name like *Taco Bell*, *Dunkin Donuts*, *Whirlpool*. It could also be changed via *Job Reconcile* when we record history and specify *End User for Job*. The brand make could also be used as an exclusion criterion in Sample Select: *Number of months since participated with end user BRAND*.
- **Budget Hours:** This and the next field are used for the Budget Reporting to calculate the budget progress in the Disposition Report: *Percent of budget used* and *Percent Complete*.
- **Target Recruit End Date:** Used to calculate the progress of the recruitment term in the Disposition Report to calculate time the remaining time for the Job Screener. Also used in the *Workload Progress Report.*
- **# to Recruit:** Number of completed needed to recruit for this Screener. Used in the *Workload Progress Report* as *Completes Needed* and *Recruits Needed Today*.
- **Metro Market:** The target Metro Market for the study. Is used to exclude respondents from other metro markets. The default value is set in the Administrator → Company → Preferences → Metro Market. Has several special values:
  - **~Not in a Metro Market** — respondent should be in NO Metro Market; in other words, his/her Zip code shall be outside all the Metro Markets.
  - **No Metro Market** — No limitation on Metro Market meaning that respondent could be from anywhere.
- **Waiver Signature URL:** a url link to the third-party signature service (ex: DocuSign or JotForm). These links are sent via email to prospects that confirm.
- **Release Signature URL:** Same as Waiver Signature, but contains a link URL for the Release Signature Form
- External Sample: Needed to allow external 3rd party respondents sample to take surveys on the Precision Survey system. In this scenario PS survey URL will be provided to respondents outside OW. They will take the survey and will get the WPQ, WOQ, WTR, WTS URLs called. When this mode is activated 4 extra fields are required:

  - **Survey Redirect URL:** URL used for redirect upon survey completion
  - **PID Format:** sub-URL with PID to be appended to the end of redirect URL, for example: *PID=(prospect_id).* Please note, that *(prospect_id)* placeholder will be replaced with the actual PID value obtained from 3rd party on starting the survey.
  - **Survey Pass:** sub-URL to append to the URL for the case when prospect passed the survey. In other words, got prequalified.
  - **Survey Fail:** sub-URL to append to the URL for the case when prospect failed the survey for any reason, whether it's a WTR, WOQ or TSS.
- **Multi-Session Recruit:** Multi-Session or Multi-Stage is the mode when one prospect has several sessions in a row to complete the job. When active, requires two extra fields:
  - **Stages:** Number of stages in the Screener, possible values: 2-5.
  - **Staging mode:** Flexible VS Fixed. In Flexible mode a respondent could have any session for any stage. In Fixed sessions make sequences (chains). Session1 → Session 2 → Session 3 OR Session 4 → Session 5 → Session 6. In Fixed Staging mode choosing first session for Stage 1 prospect determines the whole set automatically.

Screener Questions

At the bottom of the Screener form we have the Last Questions section. It's a lookup table with all the Last Questions used as Termination points and Over Quota.
Each Last Question has the following fields:

- LQ ID – Last Question ID, unique through the whole system. Automatically assigned by database as auto increment.
- Q# — A human-readable Question Number. Assigned by user and used in all the reports and tools as Last Question number.
- Description — Last Question name.
- CR Type — Call Result Type, could be of one of the following types: OQ, TR, TSS, IR, WTR, WOQ, LCE, WTS.
- Active – Yes/No

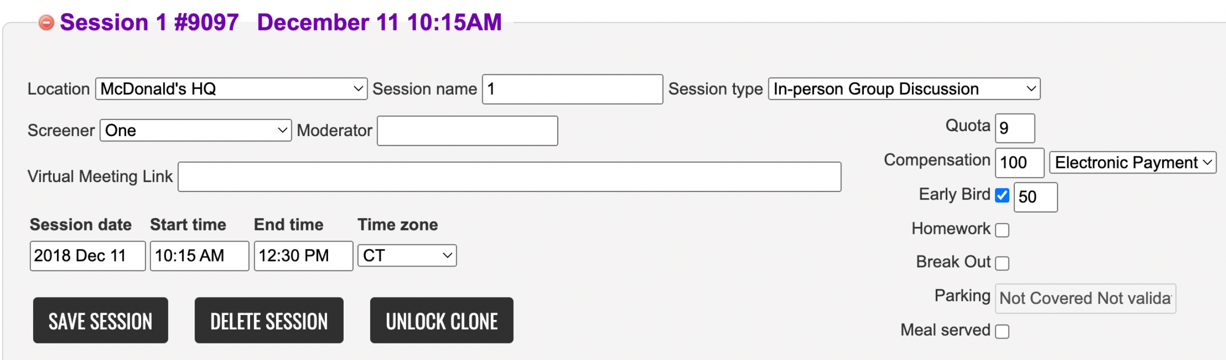
LQ ID	Q#	Description	CR Type	Active		
32416	Q1	Security	TR	Yes	Save	Delete
32417	Q2	PP topic P6M	TR	Yes	Save	Delete
32418	Q3	Age under 24/Over 50	TR	Yes	Save	Delete
32419	Q4	Does not own residence	TR	Yes	Save	Delete
32420	Q5	Other type of home	TR	Yes	Save	Delete
32421	Q6	Does less than 50% of grocery shopping	TR	Yes	Save	Delete
32422	Q7	Does less than 50% of meal prep	TR	Yes	Save	Delete
32423	Q8	Not a decision maker	TR	Yes	Save	Delete
32424	Q9	Does not own refrigerator	TR	Yes	Save	Delete

Last Questions list could be re-ordered by drag & drop. Dragging LQ ID on the left allows to move a LQ up or down directly to the right position. On release the LQ order is saves automatically. Last Questions shall be created prior to Survey creation. They will be automatically loaded into PS.

Sessions

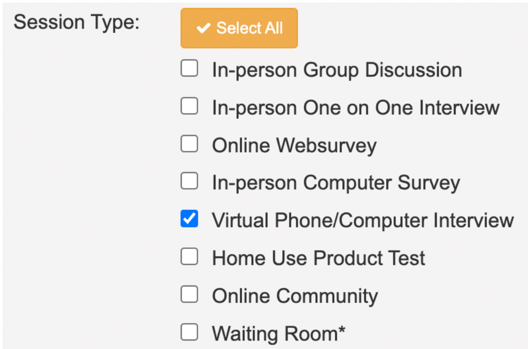
<u>Session Creation</u>

Every Screener has a set of sessions. To create a new session, we need to:
1. Go to Job Edit
2. Input a Job Number
3. Choose a Screener by clicking its name
4. Click Add new session in the Sessions block below



Session has the following fields:
- **Location:** Research Venue dropdown list. Could be changed in Administrator → Company → Research Venues. Active venues are listed in alphabetical order.
  Note: Location/Research Venue entry includes the parking information, whether the parking is free, validated or paid and how much. When location is changed for the session, the parking field is updated automatically.
- **Session name:** Shall be unique descriptive name. Usually includes number e.g., “Session 1” or “Round 2”. Session name is used everywhere as a reference for the session.
- **Session type:** Mainly session type describes the activity required for the session, whether it’s a group in-person discussion, a One-on-One Interview, or an Online Web Survey.
  The only outstanding value here is *Waiting Room*. Session Type “Waiting Room” gives us a place to store the fully qualified CO'ed prospects that can't yet be scheduled into a session.
  The reason for it is that with virtual One-on-One studies and perhaps other study types we often can't schedule a prospect directly into a real session because session times are flexible, meaning clients are willing to conduct interviews any time of the day. And we don't want to create an endless number of possible sessions only to use just a few times. Instead, we create actual sessions after we have recruited the respondent. Prospects in Waiting Room sessions are excluded from automatic confirmation sending

processes. Manual messaging using Message Participants to Waiting Room sessions is allowed.
Session type also defines the message templates to be used:



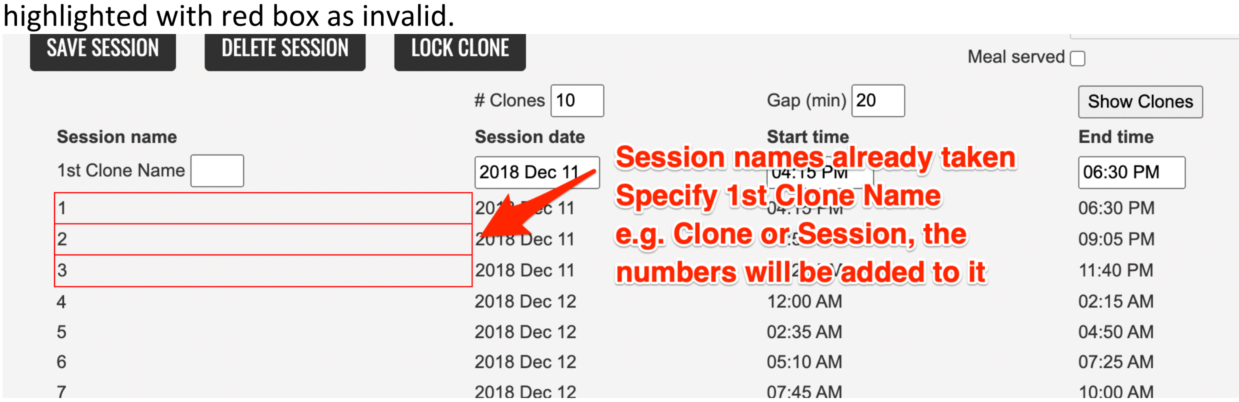
- **Screener:** This dropdown allows to switch the session to another screener if it was created under a wrong screener by any chance.
- **Moderator:** The name of the person who moderates the session.
- **Quota:** Overall session quota. An integer value. Mandatory field. Is required to create a session. The session quota is used by PS to calculate the Over Quota condition. Also, when assigning a hired prospect to a session the quota is checked to see if there's still a free slot.
- **Virtual Meeting Link:** A link to a Zoom / Teams or any other online video conference meeting. The link is sent in a Confirmation Letter after the become completes. Used for the following session types:
  - Virtual Phone/Computer Interview
  - Home Use Product Test
  - Online Community
- **Compensation:** Payment amount as incentive for the study participation. Shall be an integer without any extra text. Used in the Job Reconcile and E-Pay.
- **Payment Method:** How the incentive is paid e.g., Check / Cash / Electronic Payment / Points. Default value is: Electronic Payment.
- **Early Bird:** Extra compensation, if checked an amount is required. Early Bird Drawing incentive is paid as bonus on top of the main compensation.
- **Homework:** Extra compensation, if checked an amount is required. Homework Completed incentive is paid as bonus on top of the main compensation.
- **Break Out:** Extra compensation, if checked an amount is required. Breakout Session incentive is paid as bonus on top of the main compensation.
- **Parking:** Automatically loaded from the venue details. Can't be changed on the Session level. Contains information about parking costs, whether the parking is free / validated / paid and how much.
- **Meal Served:** Whether a light meal is served during the session.
- **Session date:** The date of the session.
- **Start time:** The Session start time based on the time zone specified.
- **End time:** The Session end time based on the time zone specified.

- **Time zone:** Session time zone (ET – Eastern Standard Time, CT – Central Standard Time, MT – Mountain Standard Time, PT – Pacific Standard Time).

<u>Clone Session</u>

Once one session is created the rest could be just cloned from it. The cloning process is straightforward:

1. Click the **Unlock Clone** button
2. Specify number of clones
3. Enter the gap in minutes between the previous session end and successive session start. (Optional, default is no gap)
4. Input the 1st Clone Name
5. Choose the date, start, and end time of the first clone.
6. Press the **Show Clones** button
7. The list of the proposed session clones will be shown.
8. If any of the clone names already exist among the Screener sessions they will be highlighted with red box as invalid.



9. When all the session clones are unique a **Save Clones** button will appear on the bottom. Click it to finalize the process. After the clone sessions are create the Session List is reloaded.

Closing a Job

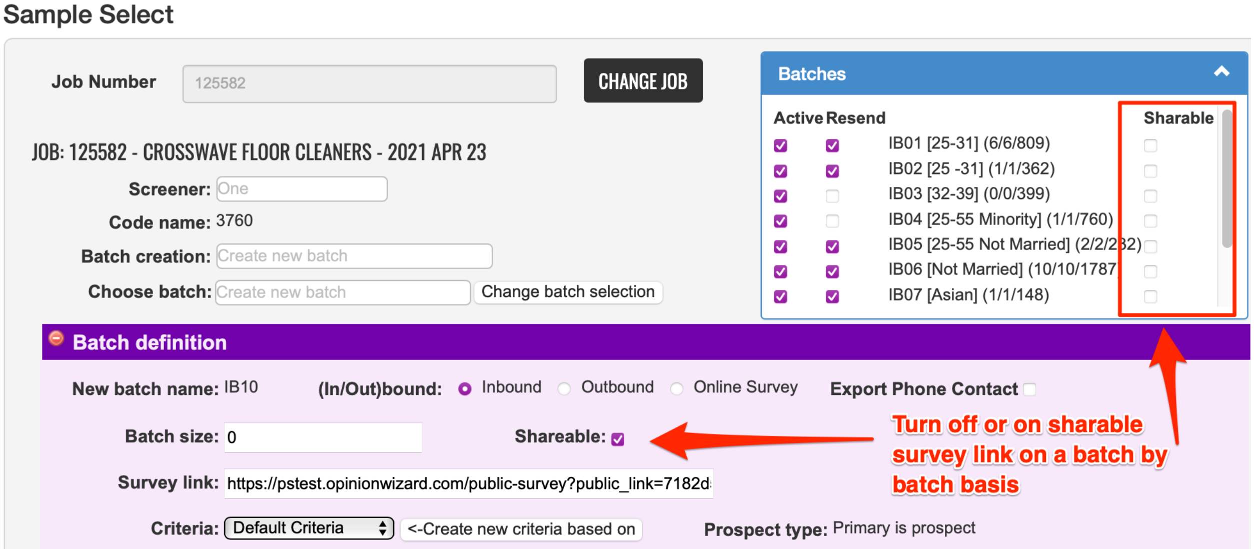
- Jobs should be closed upon job completion
- Uncheck the Active button under job edit to close
- Prior to Closing the following should be completed:
    - Reconcile the sessions being sure to check the **Record History** box and save.
    - Optionally you can send a thank you email at this time. You also could send a thank you during ePay.
    - Pay respondents! Do not close until this is done.

<u>Sample Select</u>

This program selects Individuals based the criteria provided and places prospect records into groups called batches for solicitation and recruiting.

- **Batch**
  - **Select Screener**
  - **Batch Creation (select)**
    - **Create New** - creates a brand-new batch of prospects.
    - **Add To** - adds prospect to and existing batch. This is a fast system for adding prospects to a batch using the exact sample selection criteria used initially. Batches can have only one set of selection criteria.
    - **Extract From** – Is a way to narrow a batch to what to what is needed. It allows the user to select prospects from an existing batch and place them in a new batch. This is a way to clean/remove prospect from a batch because it has become unproductive to call them, perhaps because a demographic has closed.
  - **Criteria name**
    - This is a way to memorize the choices that were used to create a batch. A named criterion can be useful as a shortcut when running future batches.
    - Criteria are unique to each job and are not available for a different job.
  - **Batch Definition - NEW**
    - **New Batch Name:** Is automatically assigned
    - **Batch Types: Inbound and Outbound**
      - Inbound – Requires prospect to pre-qualify by taking an online survey before they can be called using Batch Recruit or Screened using prospect lookup.
      - Outbound – Prospect can be called immediately using Batch Recruiting or via Prospect Lookup.
      - Online Survey – for non-recruiting jobs
    - **Batch Size:** Enter the number of prospects you want to create and solicit
    - **Sharable:** Check box only appears if screener URL slug has a name, and an image has been uploaded. Default is Checked which means the URL will be inserted into the email. If unchecked, it will not.

Sample Select



        - **Survey Link:** This will preload when using the integrated survey. **A warning will appear if the survey is not in Launch mode/**
            - You can paste in a survey link from a different survey platform if needed, for example if the client is using their own survey system. Be sure to check the connector character as different system rely on different connector characters.

Inbound Batches contain a link to a web-survey used to prequalify participants. Only people with *email addresses* or *mobile phones* are sent inbound batch invitations and we do not send outbound batches unless we exhaust these types of respondents.

Inbound Batch Prospect will not appear for batch recruiting until the pass the web-survey as their prospect status is set to -2 and batch recruiting only displays prospects with a status of 0 or 1.

Outbound Batches are sent a email invitation to call in to see if they qualify. In general people without emails are sent Outbound batch invitations but not until we exhaust individuals with an electronic means of communication as we prefer to have pre-qualified prospects call in.

- **Email/Text**
    - There are several Email/Text message choices to provide appropriate communication for different circumstances.
    - The following is a list of choices:

Email Name	**Purpose**
Inbound STD	For most inbound batches. Contains a web survey link.
Outbound Sharable	
Outbound Not Sharable	
Inbound with Friends	
Inbound Child	
Outbound Sharable HH	
Web Survey	For online surveys, not for recruiting.
Hiring	Used to recruit employees

    - Email Names above can be changed however the ID is link to specific actions, so it is not advisable to change the names.
    - Email messages can be modified when running a specific batch without effecting the message template.
    - While you can change the sender (From) when running sample is should not be necessary.
    - Email message templates can be permanently modified using the Message Template tool under Admin.

  - Emails are required for all Inbound Batches, hence "Do Not Send Message" is not an option for Inbound batches. Sample will not run.
  - Emails are sent at the same time Sample Select is run unless the sample run is scheduled to run in the future.

- **Respondent Type**: Defined in Screener Setup
  - **Consumer:** Considers only Individuals defined as Consumer based on Occupation and considers all HH choices and status
  - **Professional**: Considers only Individuals defined as Professionals based on Occupation and ignores the HH default status of Active and instead includes Active and Incomplete statuses, so that professionals that never completed the HH profile are still selectable.
  - **Consumer and Professional** Considers both Individuals defined as Professionals and/or Consumers BUT for Professionals it ignores the HH default status of Active and instead includes Active and Incomplete statuses, so that professionals that never completed the HH profile are still selectable.
  - **Online:** Considers only Individuals who opt into Online Studies. It considers all HH choices and status.
  - To select a minor as the primary prospect the project type must be "Consumer" not Professional or Online.

- **Household**
  - The default Settings for HH are as follows
    - Status = Active
    - Metro Market = Default metro set in company settings
  - Note: Default Status of Active is ignored if the Respondent Type in job setup includes Professionals so that HH's with an "Incomplete" status are not excluded.

- **Individual Selection**
  - **There are two levels for Individual Select: Primary and Secondary**
    - This allows for the selection of one person (primary) based on the criteria of a second person in the household. For example: Mom (primary) of the child aged 6-9 y.o. Secondary.
    - The system under batch definition allows for the primary, secondary or both to be prospects.
  - **There are four screens Individual selection for both primary and secondary individual.**
    - The main **Individual** screen covers the fixed data points such as age, gender, ethnicity etc.
    - The **Individual Attribute** screen allows for the selection and exclusion of attribute responses.

        - Attributes once selected can set to Yes or No. For example: Beer consumption can be set to Yes or No to achieve the target requirements.
        - Attributes can be combined with AND / OR conditions as needed.
        - All attributes within a table are connected by the OR condition
        - Attributes added to separate tables are connected by the AND condition
        - Example: If Beer consumption and Wine consumption are added the same table then either condition must be met to qualify. Whereas if Beer is added to one table and Wine is added to a separate table then both Beer and Wine criteria must be met to for an individual qualify and have a prospect record created.
      - The **Occupation** screen allows for selection or exclusion based on main occupation and specialty occupations.
      - The **Company** screen allows for the selection of individuals based on the company
  - All data collected from respondents as part of the registration is selectable via sample select.
  - Individual Attributes are selectable under the Primary / Secondary Individual Attributes.

- **Secondary Individual**
  - All selection criteria available to the Primary Individual are also available to the second individual.

- **Exclusions are based on the following rules**
  - Rule 1 (CURRECT RECORD): Individual must not have a prospect record for the current project & screener (same job# & same screener) with any status.
  - Rule 2a (CURRENT RECRUIT): Individual must not be a recruited prospect (pstatus >2) and participation_id=1, for an upcoming (Job with end date in the future) job.
  - Rule 3 (RECRUITED FAMILY MEMBER): Family member is a recruited prospect (pstatus >2) & participant_ID=1 for current project (same job #)
  - Individual participated within the exclusion time frame as evidenced by…
    - Rule 2a (PAST PAR MOS): An individual with a prospect record with a status of >2 and a participation_ID =1 for a job that ended within the exclusion time frame
    - Rule 4 (PAST PAR MOS): Individual has a history record with a participation ID = 1 for a job that ended within the exclusion time frame.
    - Rule 5 (CLIENT): Individual has a prospect record with a pstatus >2 & participant ID=1 OR a history record with a participation ID = 1 FOR a job with the excluded client ID within the exclusion time frame for the client.

        - NEW Rule 6 (END USER): Individual has a prospect record with a pstatus >2 & participant ID=1 OR a history record with a participation ID = 1 FOR a job with the excluded END USER within the exclusion time frame for the end user.
        - NEW Rule 7 (MAX SESSION): Individual has a prospect record with a pstatus >2 & participant ID=1 AND a history record with a participation ID = 1 FOR UNIQUE JOB NUMBER the exceeds the Max # of sessions allowed.

- **Counts**
    - Count will provide a report recapping the selection criteria and results; the number of Households and Individuals that meet the selection criteria entered.
    - Based on the results the user can adjust the criteria or proceed to run.

- **Run Now**
    - Run Now executes the selection, randomly choosing individual from the found population set, creating prospects, and sending emails, texts and app notifications.
    - A report of the criteria and the number of prospects created displayed on the screen and can be printed.
- **Run Later**
    - This option gives the user the opportunity to schedule sample to run in the future. Perhaps to queue up several projects or to run at times that provide better or better-timed responses to match staff levels.

Batch Email Resend

This tool facilitates messaging to batches based on a purpose.
This feature works as follows:

1. Enter Job Number
2. Select Purpose
3. Select Screener (in some cases)
4. Select Batch – Batches shown vary based on Purpose
    a. Certain purposes allow for the selection based on terminating question(s)
5. Select Question type and Last Question (in some cases)
6. Select message for choice list
7. Send

Batch Resend System

Purpose	Detailed	Who (Which Prospects)	Flieter on screener	Selection Critiera	What it does	Email Template Paired
OB Remind To Call	Remind them to call in	Sends to selected OB batch only	No	Batch=any or all P-status = 0 or 1	Records Call Result ID= 41 ES-RM & Sends email and text	Project Announce - Remind (34)
Remind to Take Survey	Remind prospect to take survey	People in selected IB batches	No	Batch=any or all P-status = -2	Records Call Result ID= 41 ES-RM & Sends email and text	InBound Std Remind (30)/(70)
WPQ Remind to Call	Remind prequalified prospects to call-in	People who Web-prequalified in selected IB batches	No	Batch=any or all P-status = 0 or 1 took_web_survey=Y web_survey_status=pass	Records Call Result ID= 41 ES-RM & Sends email and text	WPQ Call in (31)
TR-Call In Spec Change	Messages prospects who TR over the phone	Selectable based on batch and terminate question	YES	Batch=any or all P-status = 2 **web_survey_status=null or pass** last_question_id=Selected	Records Call Result ID= 41 ES-RM & Sends email and text	TR Specs Changed (35)
WTR-Retake SRV	Get prospects to retake survey	Selectable based on batch and terminate question	YES	Batch=any or all P-status = 2 took_web_survey=Y web_survey_status=fail last_question_id=Selected	Records Call Result ID= 25 - SR-SpcChng Sends email and text with URL link that is not reusable and which **does the following when clicked:** Updates Prospect record Prior Status to current status Status to (-2), took_web_survey=N web_survey_status=NULL	WTR Specs Changed (32)
Resend-Bad Link	Get prospects to retake survey due to bad link	Selectable based on IB Batch or All	YES	Batch=any or all P-status = -2 took_web_survey=N web_survey_status=null	**Overwrites email records in prospect_email** Records Call=RS Bad Link (49) Sends email and text	Bad Survey Link (33)
Resend-Srv Error	Get prospects to retake survey due to programing problem	Selectable based on IB Batch or All	YES	Batch=any or all P-status = -2 took_web_survey=N web_survey_status=null	**Overwrites email records in prospect_email** **Deletes Survey from MongoDB** Records Call=RS-Prg Error (51) Sends email and text	Survey Error (75)

Message Participants

This tool is primarily used to confirm and remind recruited participants, though it can also be used to reschedule, send forms (signature requests) or for general communication with project specific recruited prospects.

Step 1 - Select Purpose

Confirmation Letters –

- There are custom confirmation letters for various project or session types: In person, Virtual and Home Use project
- Confirmation message can be sent manually or automatically
- To send automatically the Job must be set to Auto Confirm
    - Auto Confirmation emails/text messages are sent at 9pm each night
    - Only one confirmation is sent. It will not repeatedly send confirmation for those who do not respond.
- Confirmation letters and reminders – Are sent to both parent when minors are under 16. Only the minor prospect will receive confirmation once they are 16 and over.

Reminders –

- There are 2 stages for reminder message
    - Stage 1 is for prospect who have not received a reminder message
    - Stage 1 reminders are sent 24 hours prior to the session date/time
    - Stage 2 reminders are sent to only after the first reminder is sent

- Stage 2 reminders are sent 2 hours prior to 11am sessions and 4 hours prior to sessions that start after 11am

Step 2 - Select Sessions

- Sessions can be selected individually or by using the session type selector to select virtual or in person session all at once
- By default, we include all unaudited prospects thought this and be unselected

Step 3 – Filter Prospect

- You can filter to send to only:
  - Those not messaged before
  - Those messaged but did not respond
  - Those who were messaged and did respond

Step 4 - Select Message

- The list of available messages is limited based on session type.
- Care must be taken not to send a message crafted for one session type (in-person) to a respondent recruited for a virtual session.

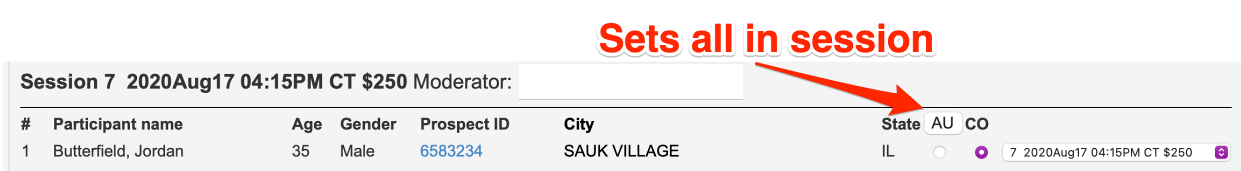
<u>Session Audit</u>

Note: This program only shall be used for jobs that Require Audit (See *Screeners* → *Require Audit* checkbox).

Before automatic confirmations will be sent to prosects, they must advance to the audited stage.

Auditing allows for quality control.
Prospect can advance to the audit stage from the prospect screen on a one-by-one basis or by session using the Session Audit program.

1. Enter job number
2. Select session
3. Choose prospects within the session to advance to Audited or click the AU button at the top of the column to set all to Audited
4. Save



Reconcile Job

Prospects are displayed by session. Select one more session to display and prospects are presented with screen with hyperlinks to the full prospect record. All prospects by default are considered Used which means they participated in the research. Using this program, you can adjust the outcome based on reality.

This program has the following functions:

- Records the outcome of a prospect's attendance in the respondent history when selected
- Allows for the adjustment of payment amount to be recorded in their participation history
- Allows a prospect to be moved from one session to another
- Sends a thank you message to participants when the option is selected
- Allow you to enter moderator name which will be recorded as part of history and can be used to exclude for future projects via Sample Select.

Company Settings

Manage → Company Settings is the same program as Administrator → Company but with one difference: it's aimed for the managers, not administrators. And it's limited to just 2 menu items:

- Research venues – whenever there's a new location for a session it needs to be added to the Research venues lookup table first.
- Hours – Work schedule could be adjusted depending on the current workload situation or pandemic restrictions.

Client Edit

This program is needed for the SaaS clients who doesn't use an external CRM system to manage their clients and jobs. To activate the built-in Client DB, go to Administrator → Integrations, switch Client DB to OW and Save. Now all the clients and jobs could be created and edited directly in OW.

- To add a client: either Manage → Client Edit → Add Row or directly from Edit Job click Change Client next to the Client Name and go to Manage Clients.
- To edit a client: Manage → Client Edit → Search & Edit
- Each client has the following fields:
    - Client ID: assigned automatically
    - State: Dropdown of US states
    - Status: Active / Inactive / Lead – Only active clients are available for pickup on Edit Job
    - Company Name
    - City

- Zip (optional)
- Phone Number (optional)

<u>Employees</u>

- **Lookup** – Employee lookup works by Employee ID # or Last Name. If more than one found, a dropdown list shown with Employee ID, Name, and a Phone Number.
- **Edit** – To update an employee record, resetting a lost password or deactivating a quit employee click Edit Employee and use a form Below.
  You can also **Delete** a mistakenly added employee using Delete this Employee button on the right side of edit form.
- **Add** – Click Add New Employee button. A form shows up below with the following fields:
  - First Name
  - Last Name
  - Employee Type / Role – Important for the user permissions
  - Password / Confirm Password – Note, we don't store plain text passwords so it could be only reset, not recovered.
  - Active – Yes / No, only active ones are allowed in.
  - Home phone (optional)
  - Cell phone
  - Employee ID – automatically assigned
- **Print** – A list of employees could be printed using Print All / Print Active. Opens a new tab with a printable page.

<u>Purge Batch</u>

Sometimes it happens that a batch was created by mistake or under a wrong Screener / Job.
To UNDO this erroneous operation, the following steps need to be taken:

1. Make the batch inactive (via Edit Job or Sample Select)
2. Go to Manager → Purge Batch
3. Enter Job Number
4. Choose a screener under which the bad batch was made
5. Choose the batch to be purged. **Note:** Only inactive batches are listed.
6. If the batch already has any completed or terminated prospects, they might need to stay to reward them with points or use in different ways. However, if you want to delete all the prospects there's a checkbox for that: **Delete completed & terminated prospects**.
7. Optionally a Sorry email could be sent to respondents to let them know that there was a mistake, and they need to disregard the previous prospect email.
8. Check the prospect counts on the right to ensure that the numbers are correct.
9. Click the Purge Batch button
10. For security reason it requires a confirmation in form of Batch ID. It's shown on the first confirmation modal.

Note: this tool has no UNDO and shall be used very carefully. It deletes all the related prospect information including calls, emails, history, payments, logs, URLs.

List Import / Match

OpinionWizard has a list matching feature which allows the comparison of an external list to respondents in the database (and import / prospect creation).

The program imports list in .csv format and requires the user to map fields in the imported list. Once run an output report will append phone and email and also will do text append on any matched records or create a batch based on those records. Optionally it will create prospect records in the IB/OB batch for an Active Job.

There are several match criteria:

- Email address
- Mobile phone
- Home/Work phone number + Name
- Name + County + State (+ Gender if available)
- Name + Zip (+ Gender if available)

Match in OW-DB	Create Prospect	Perform Mobile LU (Twilio)	Add/Update mobile Phone/carrier to Indv record	Set Phone Type	
Has email	YES	Yes	NA	NA	
Has phone	NO	No, unless matched by email (above)	No, unless matched by email (above)	Yes, if carrier found in Twilio	
Has phone	YES	YES	YES	YES – If found	To mobile
Has phone	YES	YES	YES	Yes - If not found	If mobile set to Landline

A number of matches is shown for each criterion together with the results. To create the prospects click Make Prospects and specify job number, batch name, screener, and settings:

- Only Matched – whether we want to include also unmatched records creating HHs and Individual records based on CSV file data
- Mobile Phone Validation – If checked, all the new phone numbers that are imported shall be validated using 3rd party service provider. We detect if such a number exists, whether it's a mobile, landline or a VOIP and what is the carrier.

SURVEY BUILDER

Edit Survey – Creates or opens an existing survey
Duplicate Survey – Copies a survey to a new job number
Import Survey – Uploads a web survey file (created using Tools → Export Survey in PS)
All Surveys – Display a listing of all surveys which can be opened or deleted

The Survey system consists of three creation processes: Survey Builder, Survey Logic, and Quotas.

Edit Survey Menu Items

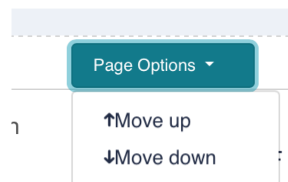
- **Survey Logic** – used to Survey Logic mode where skips, terminates, and web prequalified are established.
- **Quota** – used to set quota for the job.
- **Tools** – Has some useful tools:
    - Import from Word Document – Uploads a Word Doc and converts it into questions and answers in PS. It looks for question numbers Q1, Q1a, etc.
    - Export Survey – Downloads the whole Survey into a single file (JSON) which could be later imported into another job / system
    - Renumber questions and pages. It's best to use this at the end of the build though it can be run and rerun at any time.
        - Questions – Default prefix for question number is Q. The user can choose any character as a prefix or one of the three preformatted choices but click the preferred style. Click the blue bar to execute.
        - Pages – Page numbering starts with 1 and a prefix of Page. Page can be changed but new pages are always added as Page. Click the blue bar to execute.
    - Set default font – font settings for questions, answers, and grid headers.
- **Preview** – Allows for testing of survey flow and logic
    - Preview link can be shared with others (clients)
    - Back button allows for faster testing
- **Status** – 3 - Modes
    - **Build** – allow add edit and delete of question.
    - **Launch** – Live mode. Questions cannot be edited in this mode. A survey that has been launched can be changed back to build mode to make changes but when in build mode the survey is offline. This means respondents will not be able to take the survey.
    - **Close** – Disables survey when project is over
- **View**
    - View survey responses
    - View Survey Link

SURVEY CREATION (build):
You are in build when the survey opens. This is where you enter questions and perform light logic. If the screen is "grayed out" the survey is in Launch mode and modification to anything other than Quota cannot be made.

DEFINITIONS

- **Abbreviations** are used to shorten questions for use quota reporting and profile reports. If ignored, the full question or answer will be used

- **Blocks/Pages** are a tool to group questions you want to display on the screen at the same time.
  - This is equivalent to a screen of questions that respondents see.
    - A page can hold 1 or more question
    - Note survey logic is executed when respondent move between pages and not within. Therefore, it is best to place any questions that will terminate or skip on a separate page and not combine them with other questions.
    - Pages can be moved using the Page Options to the right of Page Number



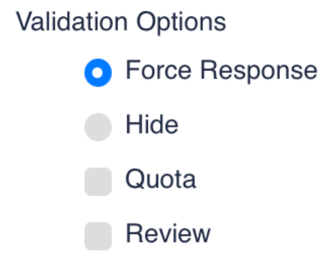
- **Questions** have several elements: Question entry, Answer entry, Abbreviations for each and Key Words.
  - Question text can be copied into the question box. Once there is can be formatted using the rich text editor. Question can also include images and videos.
  - Abbreviation box below the question box is used to shorten questions for presentation in Profile column headers. If no abbreviation is entered for a gridded question the full question will be used in the header.
  - Types: There are several question types and with each there are options related to each question type.

QUESTION TYPES

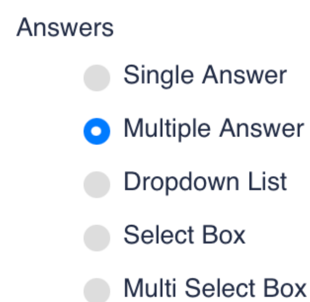
	Description	Response	Validation Options	Position	Controls
Static	Explanation message	NA	Forced or Hidden	NA	NA
Open End	Free form response	Text, Audio, Video, Photo, Phone	Forced or Hidden	Yes	Min and Max Character or seconds
Multi-Choice	Choice list	Single or Multi	Forced or Hidden,	Yes	NA

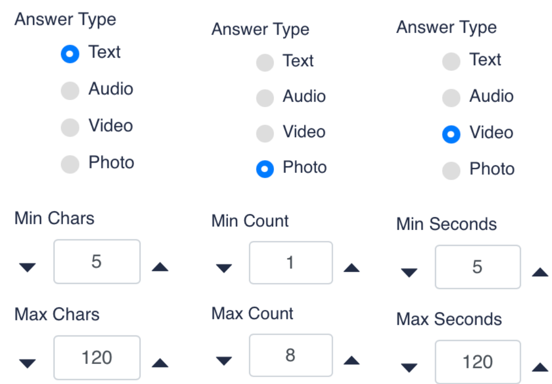
			Quota and Review		
Rank (choices)	Allows for preference ordering of answer choices	Answers are dragged up and down until the desired order is reached	Forced or Hidden, Quota and Review	No	NA
Constant Sum	Allow respondent to provide frequency or counts to answer choices	Numeric	Forced or Hidden, Quota and Review	NA	Enforce Range Must Total
Matrix	Multi-choice question with rating scale across the top	Single response ONLY of each statement	Forced or Hidden, Quota and Review	NA	Up to 10 statements across the top
Privacy Question	Preformatted question for compliance with GDRP and CCPA	NA	Forced or Hidden	NA	NA
Household Data	This imports HH questions from the database for verification and update	Varied	NA	NA	NA
Individual Data	This imports Indv contact details: Email, Phone, Birth Date, Gender and saves into Indv record	Single response for selected detail to input	NA	NA	NA
Segmentation	Allows to classify/segment respondents	Predefined segments multiple responses	Forced or Hidden	NA	NA

- **Question Validation**: Select Validations applied to a question will display on the right of the question with a capital letter (F for Forces, H for Hidden, etc.)
    - Forced or Hidden
    - Forced are required responses. Respondents cannot move to the next question without answering the question.
    - Hidden are useful when you want to ask a question over the phone rather than have the respondent answer the question
    - Review – Will appear open with recruiter's view completed surveys. They are meant for the recruiter to review and perhaps re-ask respondents
    - Quota – If quotas are required on a question or if you want counts on responses, select Quota.

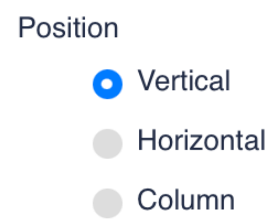


- **Options**: Options can be applied at any time, even after a survey starts, however the survey must be put into build mode to make the change.
    - Gridding – If the question is to appear on the respondent profile/grid select this option. Grid status can be
- **Number of Answers:** There can be 1 to 60 answer choices on a survey.
- **Answer Display:** The following option are not applicable to all question types.
    - Single answer: Only one response will be accepted. Appear on build as a radio button.
    - Multi-answer: More than one response will be accepted Appear on build as a check box.
        - Normally all answers choices are displayed as a list on the left with answer boxed to the right. Sometimes you may prefer a different answer format.
        - Drop Down list: This option displays the answer choices with a drop down or pull-down list. Not functional for multi-answer questions. Useful when selecting from a long list, like states.
            - Select box: shows the answer choice in a box and one may be selected
            - Multi-Select box: all answer appears in a box and more than one can be selected
    - Open End – Text, Audio, Video, Photo/Images, Phone
            - Each type has min-max limits

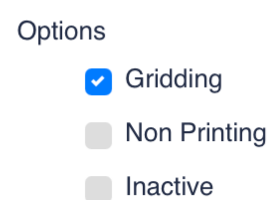




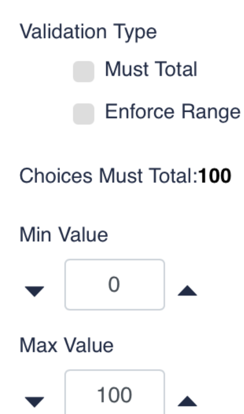
- **Answer Options:**
  - **Positions**: Changes how the answer choices are displayed.
    - Vertical – Default selection answers appear in one column on the left of the screen
    - Horizontal – List the answers in rows
    - Column – List answer in multiple columns for less scrolling to see choices. The number of columns can be specified.



- **Printing Options**
  - **Gridding –** Selection of this option will add the question to the respondent profile/grid report. See Answer Options for more gridding control.
  - **Non-Printing** – Questions you do not want to appear in a printed survey
  - **Inactive** – After a survey is launched you may need to change the survey, adding new questions and preventing the use of others. Once a survey has been running unneeded questions should be made Inactive rather than deleted.



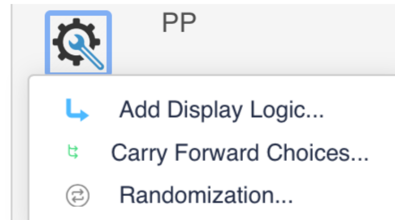
- **Constant Sum Validation Options**:
  - Enforce Range – Prevents answers outside and acceptable range. Prevent typos and non-sensical responses.
  - Must Total option forces the total equal a specific number. (last 10 purchase, must total 10)



- **Answer Abbreviations:** Like question abbreviations this help control the appearance of the profile/grid report. Example: 5 or more time per week could be abbreviate to 5+/wk or Mercedes Benz might be abbreviated as MB.

- **Key Words –** This a very powerful tool that when applied properly can be used to select prospects based on past survey responses thereby growing the power of you database without adding endless questions to the registration process.

- **Question Logic –** there two types of logic that can be applied using the gear icon to the left of each question description.
    - **Display Logic –** This allows a question to appear or not appear based on a response from a prior question. Ex: Display if "Yes" selected in question X. Remember question X must have been answered by the time they reach this question, and it must not be on the same page as the current question.

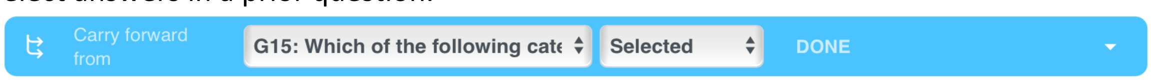


        - Understanding Display Logic: If One Page has three question and 2 questions have different display logic (Q10 and Q11) and one question has no logic (Q13). Then 1 person could see Q10 and Q13 and another Q11 and Q13 and still another just Q13

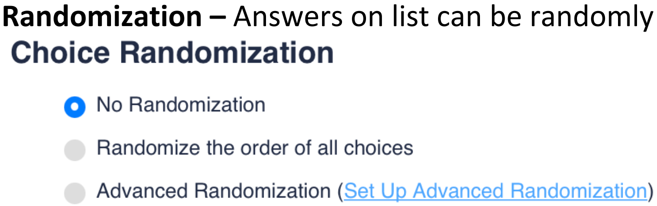
        - The page is custom built at the time of load. It cannot execute other display logic within the page, ie based on answers to question on the same page after the page load.

        -

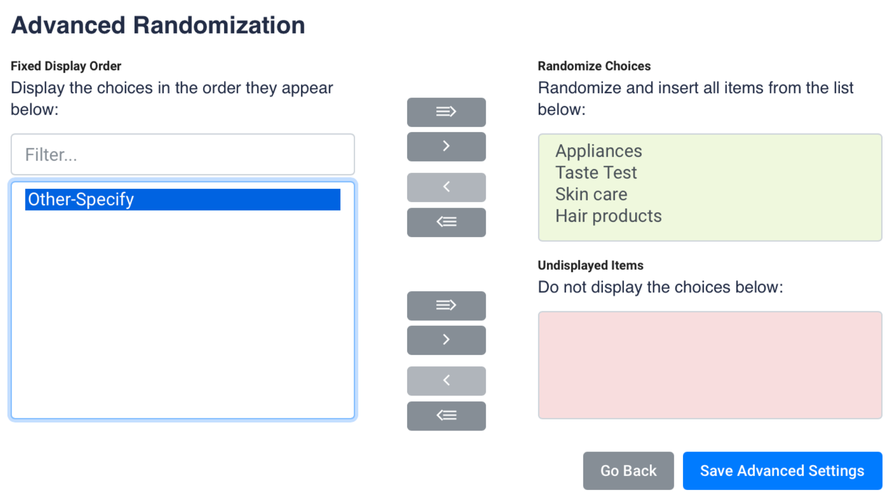
    - **Carry Forward –** Used to limit the display answer choice based on selected or not select answers in a prior question.



    - **Randomization –** Answers on list can be randomly displayed to prevent bias.

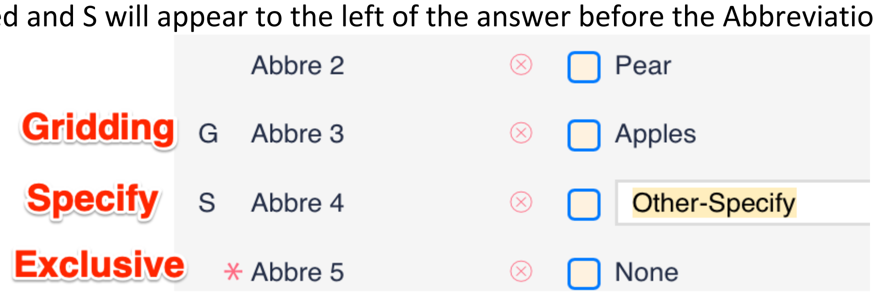


    - **Advanced Randomization** offers the ability to exclude some answer choices from randomization. It also allows non-display of selected answers.

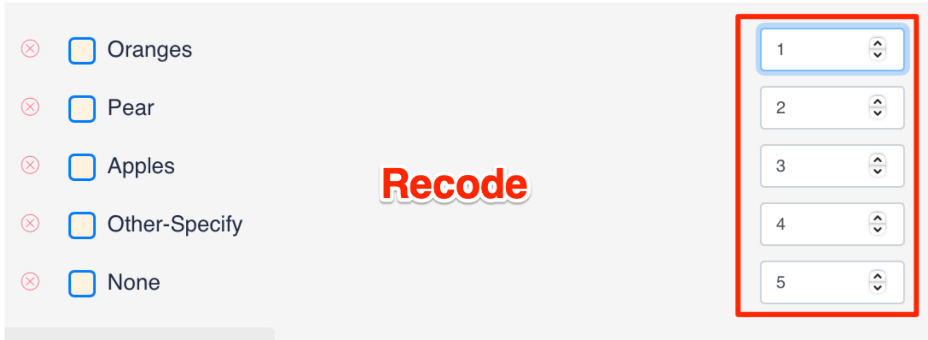


- **Answer Options:** selecting any answer presents the answer edit box and a pull-down showing answer Options.
  - **Rich Text Editor –** allows for font and style changes
  - **Mark as Gridding –** Sometimes you do not want to profile/grid every answer choice on a **Multi-Answer** response. Using this option will limit the columns added to the grid to only those marked G. When selected, a G will appear to the left of the answer before the Abbreviation box. The question must also be marked Gridding.

  - **Exclusive –** Only applies to Multi-Choice answer lists: When selected, only this response can be chosen. Oher responses will automatically be unchecked. When selected a red asterisk appears to the left of the answer before the Abbreviation box.
  - **Mark as Other Specify –** Require type response to an "Other" answer. When selected and S will appear to the left of the answer before the Abbreviation box.



  - **Recode:** Allows you to enter a value for response other than the default response. Answer values by default start with 1 and increment higher. Perhaps you want the first answer choice (Excellent) to have a value of 5 rather than 1. Recode allows you to do this. These values can be later used in advanced logic.



- **Logic Flow -** Used to create advanced/complex logic.
  - This screen facilitates advanced logic based on selected and not selected choice or values.
  - It can also create logic-based answers to multiple questions.
  - For each question block, logic statements and rules can be applied based results of the logic
  - Results to the logic can be to skip (Branch) to another block or End the Survey.
  - By default, all blocks appear in Survey Logic*.*
  - Logic is executed when responses are saved. Therefore, logic cannot be performed to skip a question is the same block.
  - *Blocks can be duplicated in the logic when two paths are created.*
  - ***Embedded data** is a tool to create variables to greater ability to proforma logic based on computation of multiple value answers*.

- **End of Survey (EOS) Blocks**
  - WPQ – Respondent is prequalified or fully qualified
  - WTR – Respondent is disqualified
  - WTS – Respondent is disqualified but may be recalled if specs change
  - Alt Redirect – Qualified or Completed survey when using a third-party sample company
    - WTR and WTS EOS (END OF SURVEY) Blocks must be related to a screener question established during Job Edit → Screener creation.

- **Quotas** – Quotas are set under this menu option. Quota can be changed when survey is in Launch mode. There are two ways to set quotas: **Quick** and **Advanced**.

  Both quota setting options allow for the setting of Overall Project quotas and Session Quotas. Like Survey Logic each quota point has an EOS block, which ends the survey as quota limits are reached. As such each quota point must be related to an Over Quota screener Last Question ID (LQID) as established during Job Edit → Screener creation
  - Quick Quota Implementation
    - Exact – Is used when a precise number of people are required for a quota
      - If **Exact** quota is selected at least one item must have a value.

        - Range – Allows for an accept Minimum and Maximum value for each quota point.
        - If quota **Range** is selected but no min or max value is entered a LQID is not needed as this is considered a count only with no quota enforcement.
        - **Show Counts** is another quota type which is made exactly for this purpose — to show counts without enforcing any quota.
        - Empty values are considered 0 (min) or unlimited (max)
        - Once quotas are set for a session they can be copied to other sessions when appropriate to speed quota setting.
    - Advanced Quota Implementation
        - Work the same as the Quick Quotas with respect to Exact, Range 0 values and copying.
        - The add advanced logic where quotas can be based on more than one question. For example: Age and Gender, or products used and favorability (Eats at McDonalds and Rates it 4 out of 5)

- Preview — There are several preview tools available:
    - **Preview** — Survey preview as it'll be shown to the respondents. Available sessions are listed on the left. A question configuration letter is shown on the right e.g., F - Forced, G - Grid, etc. Note: In preview mode the survey results are not stored anywhere. It's more of a test tool to run through the survey and verify that all the termination points are set correctly.
    - **Preview hidden** — Same as Preview, but also displays hidden questions.
    - Question Options → **Start Preview Here** — Opens survey preview as if this question was first in the survey. It allows to test this question and all the further ones. If this question is hidden it will be shown any way.
    - Question Options → **Question preview** — Opens a popup with just this question view. No transition to the next question. Just to check the look & feel of the question and the answer options.

- Launch - Locks survey and creates a unique survey URL link, which is automatically saved as Screener Web Survey Link.

Advanced Quota

In order to achieve more detailed quota setting we need to use Advanced Quota from the quota section. Advanced quotas are like those used in Survey logic in sense it's a combination or question responses joined with an AND or an OR condition.

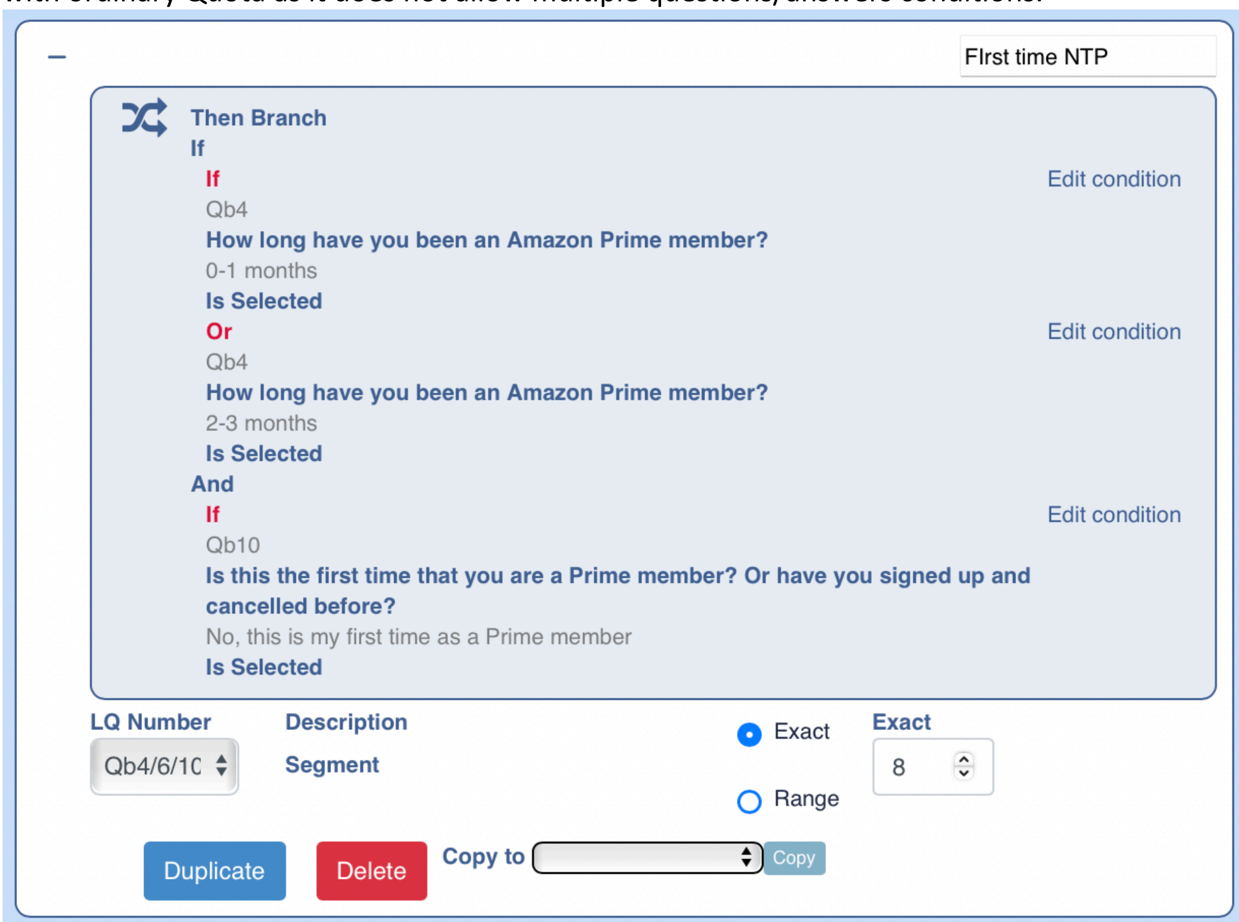
Advanced quota could be either for whole job or a separate session.

To create an Advanced Quota rule, go to **Survey Builder → Edit Survey →** Quotas → **Advanced Quotas tab.**

Advanced Quota, works like Survey logic, and can create quotas based on multiple question responses and unlimited conditions. Logic conditions are assigned by LQID assignment.

Like Quota, Advanced Quota could be either Exact or a Range. And same way it requires a Last Question selection.

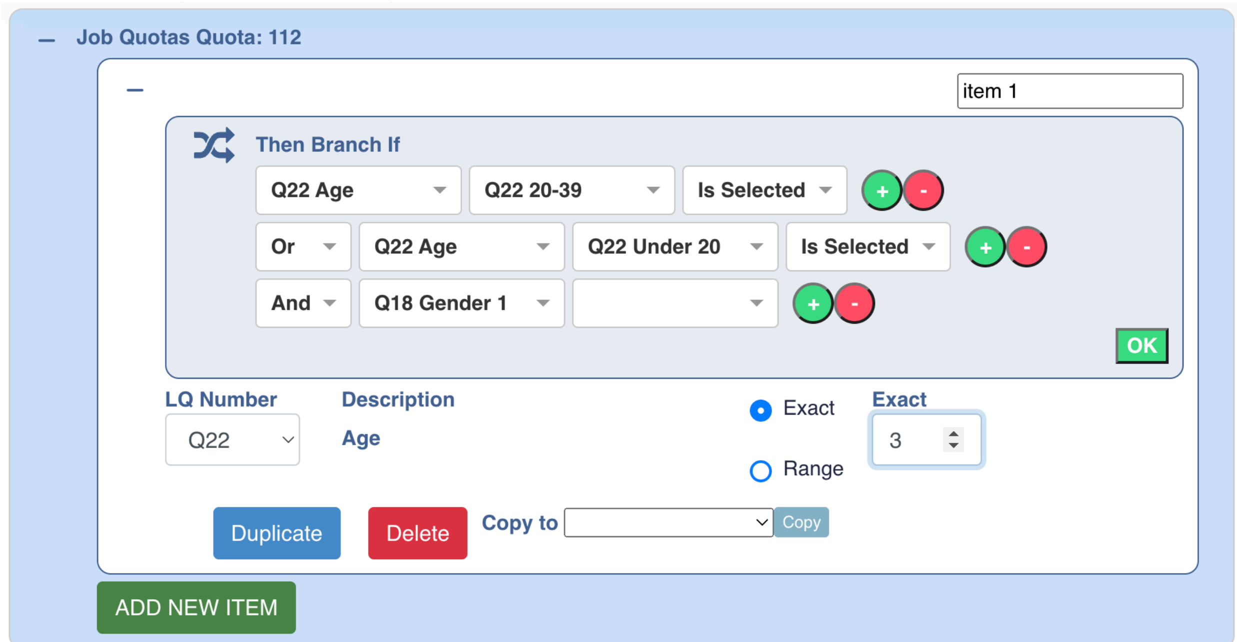
Let's consider this example. We want to make a quota of 8 respondents on those who are using Amazon Prime for up to 3 moths and it's their first membership. We can't achieve the same with ordinary Quota as it does not allow multiple questions/answers conditions.



Another very typical example of advanced quota is gender-age.
The main different is a complex quota set based on more than one question. In the example below we want 1 session with a mix of age and gender. Quick quotas where gender and age are not linked cannot achieve the objective below where N= Quota

Age/Gender	Male	Female
Under 39	N=3	N=3
Over 39	N=3	N=3

One more point: Unlike Quota, the Advanced Quota can't be evaluated after each question. Advanced Quotas can't be evaluated until the end of the survey or at least after the last question in the logic block.



<u>Duplicate Survey</u>

- Surveys can be duplicated by providing a **source job** number and the **new job** number to copy to. Duplication copies all the survey questions.
- Additionally, there are options to **duplicate** either **logic** or also the **quota** settings.
- For **Quotas** to duplicate the session names must match those of the source job.
- Duplicate prospects checkbox will also replicate the prospects. Some projects are repeats. So we have the ability to duplicate the job, and the survey. This saves us time in project set up. Often the prospects that were not used, can be eligible for the new project. Since they have already answered all the survey questions, it makes sense to duplicate their surveys also. The duplication (or replication) first have OW create new prospect records based on the prior prospect records. Then the survey creates duplicate survey results linked to the newly created prospect record. It does not duplicate all the prospects and survey results.
- Prospect Duplication: Would only duplicate prospects with a status 0, 1 and Survey status = pass or prospect with a status of 2 and LQID type OQ/WOQ, TSS/WTS, QR, WPQ and also CO with which were "Not Used" (P/S, N/S, CL24, late)

- Survey Duplication: Duplicates All surveys based on the prospects which were duplicated

Import Survey

- Surveys exported with Tools → Export Survey could be used to create new surveys by uploading the survey file.
- The advantage over the duplicate survey is that the survey file could be obtained from another installation of the platform. Also, it could be used for the survey versioning.
- Survey file is a proprietary file format. Even though it's a simple JSON file, it's not possible to use it with any other software than OpinionWizard / PrecisionSurvey.

All Surveys

- Lists all the surveys with job number and name, screener, status, result counts and modification date
- Search filters allow to quickly find a survey by job number/name, screener and/or status
- A survey could be quickly deleted using a trash can icon on the left. Note: survey can't be in Live mode and can't have any responses to be deleted.

REPORTS

Attendance Report

This report produces a list of respondents for each session. The results display on the screen with hyperlinks to the full prospect record. The report can also be exported as a csv file or printed. The report has the option to include reward balances and 1099 status.

Job 125672 - VMS for Loran Group

Session Robyn 1 Tuesday July 13 2021 10:00AM - 11:00AM CT $100

#	Name	PID	Phone	Email Address	Indv ID	Reward Earn Balance	1099 Y= Need	Status	Sent Confirm	Date/ Time Remind
1	[redacted] Jenna	7336972	[redacted]15 (C)	[redacted]@gmail.com	202753	9		RM	07/07/2021 19:15	07/12/2021 10:06

STATUS
CO - Complete
AU - Audited from prospect screen
RAU - Reconcile Audit from Audit program
CF - Respondent Confirmed
RM - Respondent acknowledged reminder

Batch Status Report

This report gives a summary information on the job batches. Each row is one batch with counts and percentages on No response, Took Web Screen, Dead (LCE, TR), Available Later/Now, CB Today, Invited. Totals for each batch type provided: IB/OB/OTF. Optionally can include inactive.

Batch Status Report for Job # 125672

Generated 09/05/2022 10:10:23 AM

					Took Web Screen				Dead							
Batch name	S	Total	No response		WTR		WPQ		LCE		TR		Available Later	Available Now	CB Today	Invited
IB02	A	583	480	82%	54	79%	14	21%	0	0%	1	0%	0	1	0	10
IB03	A	698	570	82%	97	80%	24	20%	0	0%	10	0%	0	2	0	9
IB04	A	1143	992	87%	112	79%	30	21%	0	0%	4	0%	0	3	0	5
IB05	A	240	187	78%	44	90%	5	10%	0	0%	2	0%	0	2	0	1
IB06	A	114	67	59%	32	100%	0	0%	0	0%	0	0%	0	0	0	0
IB07	A	2252	1790	79%	378	97%	11	3%	0	0%	7	0%	0	1	0	1
IB09	A	511	383	75%	108	95%	6	5%	0	0%	5	0%	0	0	0	1
IB10	A			%		%		%		%		%				
IB12	A	601	521	87%	78	100%	0	0%	0	0%	0	0%	0	0	0	0
IB13	A	844	749	89%	90	98%	2	2%	0	0%	0	0%	0	2	0	0
IB14	A	995	866	87%	128	100%	0	0%	0	0%	0	0%	0	0	0	0
TOTAL	**A**	**7981**	**6605**	**83%**	**1121**	**92%**	**92**	**8%**	**0**	**0%**	**29**	**0%**	**0**	**11**	**0**	**27**

Disposition Report

It's a dialing report with number of calls made by employee on the job for the given period.
The report is exported into an Excel spreadsheet and could be downloaded any time.
A breakdown by call result included as well as a more detailed information on terminates, over-quota and TSS by LQ. Completes by session and Total.

Also**,** budget-oriented statistics is shown with Budget hours, percent budget used, percent complete.

Team velocity is calculated as dialings/hr, contacts/hr, full screeners/hr and completes/hr.
The individual employee performance is included in separate tabs.

Employee Time Tracking

Time tracking begins when an employee logs in.

To log in an employee will need an ID number and password and a job number.

The job number can be for an actual project or it can be special numbers assigned for specific purposes such as Meetings, Training, or general admin.

Automatic Time Tracking:

Once logged in as a recruiter/interviewer any action to access prospects creates a time log for time on the job-related to that prospect. This means every time a prospect from a different job is opened, a time record is created. When in batch recruiting transitioning from one prospect to another does not record time records because all prospects are in the same job. When using prospect lookup a time record will be created if the prospect accessed is related to a different job than the last prospect record worked.

Manual Time Tracking:

Logoff: When an employee is done for the day, they must logoff creating a record for that time. Logoff may also be used if an employee is taking an extended unpaid break.

Breaks: When breaks are taken rather than logging off, an employee should select Logoff – Break. This will include the time on break in the total time worked as breaks are typically paid. Logging off will stop the clock until they log back in.

It is common to log off if the break is unpaid such as with lunch whereas, 15-minute breaks might be paid so using the break feature would be used.

Working Offline: There may be occasions when an employee is doing an activity that does not involve the OpinionWizard System. If you want time tracked, an employee should select Working Offline. This will create a time record but not enter the OpinionWizard system.

After this log, if they later go back to working in OpinionWizard they login **without** checking the working offline option and time will be tracked normally.

When finished with the online task the employee logs off normally.

At the end of the day, login again and check working offline. This creates a final time record.

Report

To get number of hours done by employees use the **Employee Time Tracking** under **Reports**. It can run either for all the employees or one if you provide an **Employee ID**.
Adjust the date range and click **List**. The rows are output chronologically and have **Interval** for each work session.
Hit the Export button to download an Excel spreadsheet with 2 tabs:

- Time Summary — Total hours done by each employee
- Employee Time Detail — All working sessions grouped by employee

Note: time tracking records that were adjusted by manager are listed with notes. Original time or deleted records are shown with the name of the manager who edited/deleted the record.

Grid/Profile Report

The program exports the recruited/scheduled prospects for each chosen session in an Excel file with survey responses designated during the survey building process. Questions and answers with the Grid (G) indicator are included in this report.
The report has several options:

- The results can be grouped by session, by day or All on One Sheet.
- Session is used for groups where each session is listed on a separate worksheet.
- Days are typically used for one on ones when you want all participants on a single worksheet.
- The All on one sheet lists all prospects in date/time order on one sheet irrespective of session and includes an incentive column. This is different than Day as it includes all dates on one page.
- Include Mailing adds to the output the mailing address which is useful for home visits or mailing products or incentive payments.
- Include Employee ID is useful to know who recruited the respondent to be able to quickly get details from the person who knows more
- The WOQ / WTS / QR include a separate worksheet for each one selected. Each of these worksheets list the prospects that were Over Quota, Terminated or Refused and Save (holds) and is useful when presenting prospect for potential approval to clients.
- Prospects could be listed Alphabetically or by Result Date
- If respondent cancelled 24 hours before session, he will still be listed with a CL24 mark

Note: This report processes a lot of data including all the web survey responses and depending on number of prospects might take some time to run. Please be patient. When the report is ready an Excel file will be downloaded.

Quota Report
This report gets a job number and a screener and displays the quotas, both overall and by group. All the quotas set for the survey are listed with the target and current values. To speed up the quota evaluation process we introduce color dots when:

- Quota Are Full - (Current - Max or Exact) = Black Dot
  and when
- Quota are exceeded (over quota) - (Current >Max or Exact) = Red Dot

Advanced quotas are shown in different color (purple italic) and “advanced” appended to the condition name.

The report is exported to PDF file by pressing the Print button.

Quota Report - One
C+R Research - Microwave Dyads-125508

OVERALL 39 (1300%) / 3

Q3 Gender	Current	Min	Max	Exact
Male (including transgender male)	18	20	31	
Female (including transgender female)	21	20	31	
Non-binary/Other	0	0	10	

Q4a Age Range	Current	Min	Max	Exact
Under 25	0	0	0	
25-39	8	13	18	
40-49	19	13	18	
50-54	12	13	18	
55 or older	0	0	0	

Q10 Education	*Current*	*Min*	*Max*	*Exact*
HG/TS*(advanced)*	*2*	*8*	*12*	

Q13 HHI	*Current*	*Min*	*Max*	*Exact*
HHI 50-100k*(advanced)*	*12*	*10*	*20*	
HHI 200k+*(advanced)*	*4*	*7*	*10*	

Workload Progress Report

Report allows review to up to the minute progress on all live reports. It lists all the active jobs with end date in future with accent on the recruits expected with a highlight on how many recruits needed by today and how many already recruited. An expectation note could be added to every listed job and exported to Excel file.
It makes use of the Screener's fields: **Target Recruit End Date** and **# to Recruit**

Callback Report

This report takes a period and provides a list of scheduled callbacks broken by Job. The list includes:

- Job – Job Number
- Batch – Batch Name
- Prospect ID – PID
- Prospect Name
- Callback Time – CB time set by the respondent
- Phone Number – Preferred by prospect phone number for a call
- Result Code – Mostly it's CB, but could be also an automated CB created by AM/BZ/NA

Each Job CB list could be printed using the Print button on the right. It opens a new tab with a printable version of the report.

Job Time Report

Like the Employee Time Tracking Report but aims to getting time spent on the given job. Select start and end date as well as job number. This is a download-only report. It generates and downloads an Excel spreadsheet with 2 tabs:

- Job Time Summary – Time spent on this job every day by each employee and the total
- Job Time Detail – Has a complete list of the work sessions as employees login, change job, go on break and come back and finally logout. It's a handy tool for a manager to review the job progress performance.

Job Stats Report

This report is very similar to the Job Time report. It focuses on the dialing and completes (people invited). In essence this is a static cumulative report that represents a snapshot of the time and contacts made on a job.

To run it navigate to Reports → Job Stats Report, choose a job number and hit the Build Report button. It will generate and download an Excel spreadsheet *Cumm_Job_Stats_{job number}_{job name}.xlsx* like this one:

	A	B	C	D	E	F	G	H	I	J
1	**Job Stats Report**	**125027**	**Affogato MHQ**							
2										
3	**Employee ID**	**Employee Name**	**Total Hours Used**	**DPH**	**CPH**	**FSPH**	**TOTAL Dialings**	**TOTAL Contacts**	**FULL Screen Count**	**TOTAL Invited**
4	26	Arnold Keith Bibbs	15.98	20.46	4.32	1.06	327	69	17	11
5	48	Edward Jackson	5.05	4.75	2.97	1.39	24	15	7	2
6	52	Fern Levin	1.25	10.4	3.2	0	13	4	0	0
7	302	Hazel Medina	6.78	27.29	6.93	0.88	185	47	6	3
8	428	Alan Minevich	0.28	0	0	0	0	0	0	0
9	447	Roy Rawson	0.01	0	0	0	0	0	0	0
10			**29.35**	**18.71**	**4.6**	**0.55**	**549**	**135**	**30**	**16**

The following employee stats fields are included:

- Total Hours Used — number of hours this employee spent on the job
- DPH — dials per hour, both missed and reached
- CPH — contacts per hour, reached only
- FSPH — FULL Screen per hour, includes: OQ, TSS, QR, CO

Live Production Report

This live production report is very similar to the Job Stats report in layout, however,

1) It opens in a new browser popup window (not just a tab) so as not to tie up the main window. The full connection to OW is maintained and the new window just floats that it can be placed somewhere on desktop and kept open. The user works on OW doing other things while keeping this Live Production Report open in sight.
2) It reports on all jobs being worked for each interviewer for all jobs combined. Not just one job.
3) The list of employees includes "Interviewers". Not managers or admins or any other employee types.
4) Reports only on current day NOT cumulative for all days
5) **Most important is it refreshes the screen, updating all results periodically (every 20 seconds)**

opinionwizard.com

Live Production Report

Interviewer	Hrs	DPH	CPH	FSPH
Arnold Keith Bibbs	3.94	6.09	1.78	0.51
Diana Cruz	4.52	0	0	0
Edward Jackson	3.85	4.16	3.12	2.34
Chante Burrell	3.96	0	0	0
Hazel Medina	3.28	21.04	5.79	1.22
Daniel Heistand	3.93	5.85	2.29	1.27
Barbara Fleming	3.28	6.1	4.27	1.52
John Herdzina	3.92	6.89	3.06	1.53

The main metrics are:

DPH	Dialings per hour	Data come from calls table (all records associated with employee/interviewer for the current date dived by hours worked_
CPH	Contacts Per Hour	Data come from calls table (all records classified as reached (TR, TSS, CO OQ...) associated with employee/interviewer for the current date dived by hours worked_
FSPH	Full Screens Per Hour	Data come from calls table (only these specifc call types (TR, TSS, CO OQ) associated with employee/interviewer for the current date dived by hours worked_

Sample Run Log

It's a management screen for the Sample Select runs, both scheduled and instant ones:

Sample Run Log

From: 2022-08-01 thru: 2022-09-12 Job #: Select Clear Delete

#	Job Number	Job Name	Batch Name	Criteria	Scheduled For	Run Date	Batch Qty	Actions
1	125911	FS Cupping Pepperoni	IB10	F 25-39 Cauc	08/24/22 3:30pm	08/24/22 3:24pm	100	Report Delete
2	125911	FS Cupping Pepperoni	OB03	Females 25-39-Cauc	08/24/22 12:30pm	08/24/22 12:28pm	181	Report Delete
3	125911	FS Cupping Pepperoni	IB11	Female 25-54-Cauc	08/24/22 11:45am	08/24/22 11:36am	100	Report Delete
4	125902	Mock Jury	OB26	Males-A-Lake/Cook-2	08/23/22 2:30pm	08/23/22 2:17pm	150	Report Delete

This screen shows the Batch type and number, Job number and name, end date. Scheduled run time and factual run time, number of prospects found.

For each entry there's a pair of action buttons: Report and Delete.
The report button opens a popup window with full Sample Select Run information, like one shown on the Sample Select page after a successful run. In the footer of this popup there's a Create PDF button to export the Sample Select run result as PDF.
Delete button allows to delete one or all the Sample Select Runs.

The report period and job filter allow to output just a certain job number Sample Select Runs or filter by time. Default period is last week.

Sign In Sheet
Similar to the Attendance report, it produces a printable report with a listing of prospects within each session. These prospects are listed in alphabetical order by last name for use in checking people in and out of in person research sessions. The report allows space for the respondent to sign in and initial after receiving payment.

Unconfirmed Participants
This report can be run manually but is also scheduled to send to supervisor automatically each day.

- It runs daily 5am
- It selects all the jobs (excluding 999 Update Job) with the end before today
- It finds prospects how are Completed (3) or Audited (4). Prospects must be assigned to a session.
- Where a confirmation was sent.
- But the respondent did not confirm.
- Send one email per job to administrator Carrie Atkins: WARNING: Unconfirmed Participants. Job: N has participants that have not confirmed. This could be the result of unaudited participants not being sent the confirmation letter or the job not being automatically sent confirmations. Please take action to confirm or replace the participants.
- Email template used: Unconfirmed Warining (53)
- Sent to OW Virtual employee 3.

1099 Report
This report lists individuals that were paid in total an amount equal or higher than 1099 threshold (at the moment of writing its $600.00). Once an individual overpasses this threshold he receives tax1099 status = Need, meaning he must provide us with his SSN/EIN for taxation. To stay compliant with 1099 tax reporting we notify these individuals using Household Manager with 1099 filter = Need.
So back to report, it serves two purposes:

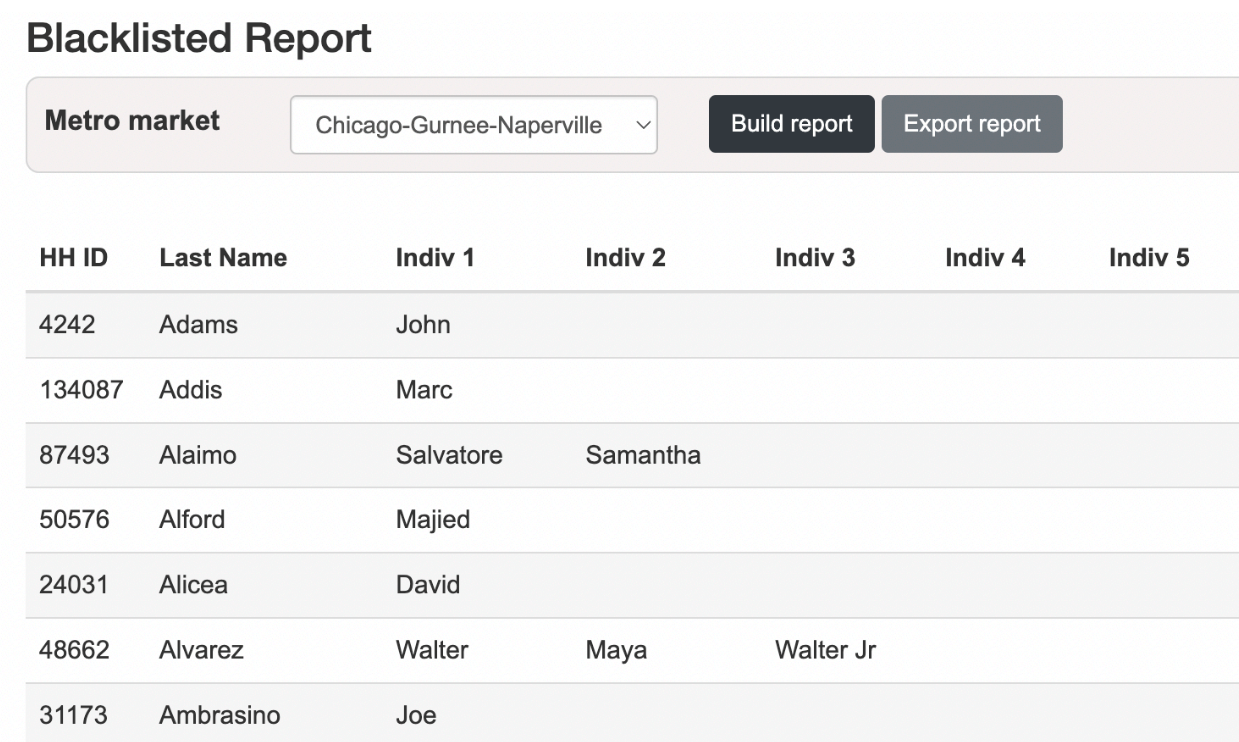
1. Check the list of individuals who require 1099 form based on the history of their payments
2. Even more important purpose is to export the 1099 printable PDF forms for selected individuals. By default, all the individuals who have their SSN/EIN on file are checked for

the Form1099, but it’s also possible to check them individually. A handy check/uncheck all checkbox allows a mass selection. Generated form is based on module provided by government. It shall be printed out and shipped to government.

The report has an option to switch the year to check the tax1099 reporting for the past years (last 4 years are available for reporting).
Export button generates and downloads a CSV file with the list of individuals shown on this page: First and Last Name, Indv. ID, Mailing address (street, city, St, Zip), email address, Year to Date (YTD) Earnings total, 1099 status (Need / No Need / On File).
Report based on History table. Looks at the year selected, Sums Incentive totals and creates report records for those who exceed the 1099 threshold in the Company Preference table. To change the threshold, navigate to Administrator → Company → Integrations → 1099 Threshold.
Note: since this report contains sensitive data for obvious reasons it’s limited to system administrator user role only.

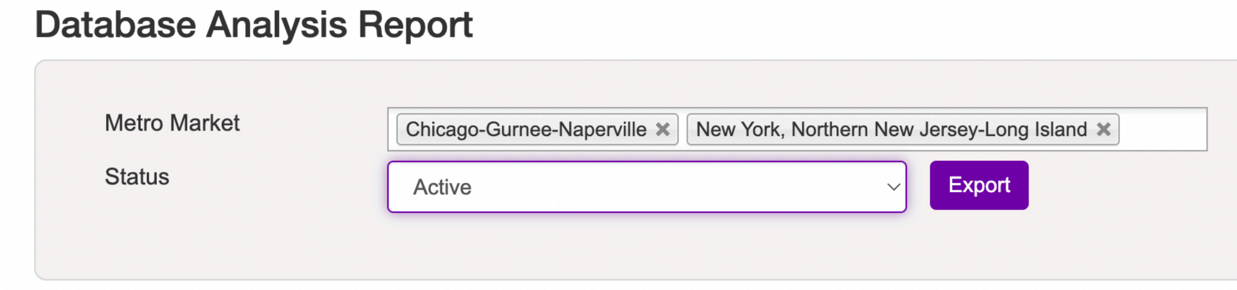
Blacklisted

The Blacklist report outputs blacklisted/problematic households within a selected Metro Market – one entry per HH: HH-ID Last Name Indv name 1, Indv Name 2, Indv name 3 etc. Sorted by last name.
The report criteria: HH has a blacklisted member (status = 5).
Build report - outputs list of HHs (and the individuals) on a page.
Export report - downloads a csv file.



HH ID	Last Name	Indiv 1	Indiv 2	Indiv 3	Indiv 4	Indiv 5
4242	Adams	John				
134087	Addis	Marc				
87493	Alaimo	Salvatore	Samantha			
50576	Alford	Majied				
24031	Alicea	David				
48662	Alvarez	Walter	Maya	Walter Jr		
31173	Ambrasino	Joe				

DB Analysis Report



It's a report that summarizes demographic data by status. It could be found under Reports → DB Analysis. The report takes an input: multiple selection of Metro Markets and a status (or All). Export button generates and downloads an Excel spreadsheet. If no Metro Markets selected, it's same as All. Every selected metro market makes up a new sheet in the Excel file. In addition to this a Summary tab is added with totals on all the selected metro markets.
The report includes the following metrics:

- Income
- Home ownership
- Number in HH
- Children Under 18 Living at home
- HH attributes
- Individual counts breakdowns by:
  - Gender
  - Age
  - Marital status
  - Education
  - Ethnicity
  - Work Status
  - Primary Language
  - Political Preference
  - Individual attributes
  - Health Issues
  - Activities

Find Duplicates

It's a Duplicate Report with output to CSV in the Reports menu.
When run, there are Three sections:

1. Duplicates in HH: Indv First name, Last name, and Birth date match in the same HH
2. Duplicate in metro: (not previously listed in other Dups in HH): If Indv First name, Last name, and birth date match NOT in same HH but in same metro market.
   Output: Both HH ID's, and HH status
3. Duplicates in DB: (not previously listed in other sections): If Indv First name, Last name, and birth date match NOT in same HH and NOT in same Metro Market
   Output: List Both HH ID's, and HH status

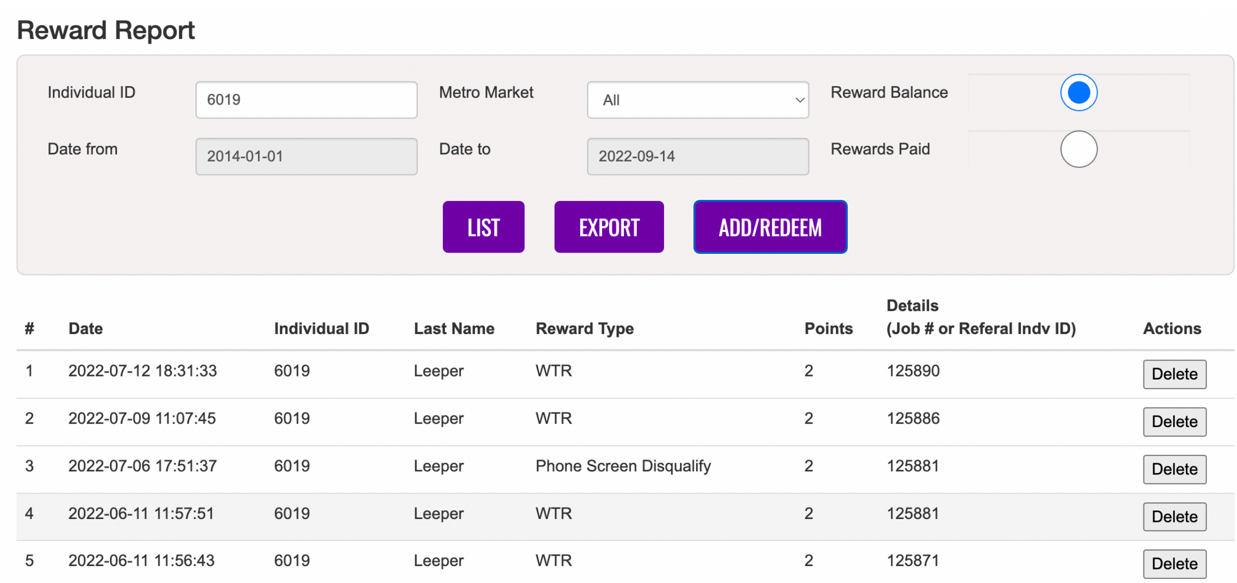
<u>Reward Report</u>

It's a Member Rewards Report Summary based on rewards balances. It produces a downloadable Excel file. This report can be filtered by:

- Metro Market (all or one)
- Date range (default is Jan 1st, 2014 – today)
- Individual ID (optional)
- Rewards Balance (default) or Paid

The report has two modes:

- Individual rewards when an Individual ID is specified. In this mode is shows off the list of the screen and has an option to delete a reward
- All the rewards – when Individual ID is not specified the list could only be exported to a file due to its size



#	Date	Individual ID	Last Name	Reward Type	Points	Details (Job # or Referal Indv ID)	Actions
1	2022-07-12 18:31:33	6019	Leeper	WTR	2	125890	Delete
2	2022-07-09 11:07:45	6019	Leeper	WTR	2	125886	Delete
3	2022-07-06 17:51:37	6019	Leeper	Phone Screen Disqualify	2	125881	Delete
4	2022-06-11 11:57:51	6019	Leeper	WTR	2	125881	Delete
5	2022-06-11 11:56:43	6019	Leeper	WTR	2	125871	Delete

To manually give user a reward bonus please click the Add/Redeem button, choose a reward type, and optionally change the Individual ID.

To list the paid-out rewards switch the report to **Reward Paid** mode.

<u>Unreconciled-Archive</u>

Report is an Excel spreadsheet download with two tabs.

1. Unreconciled
2. Not Archived

Report lists as header on each tab: Job number, Client Name, End Date.

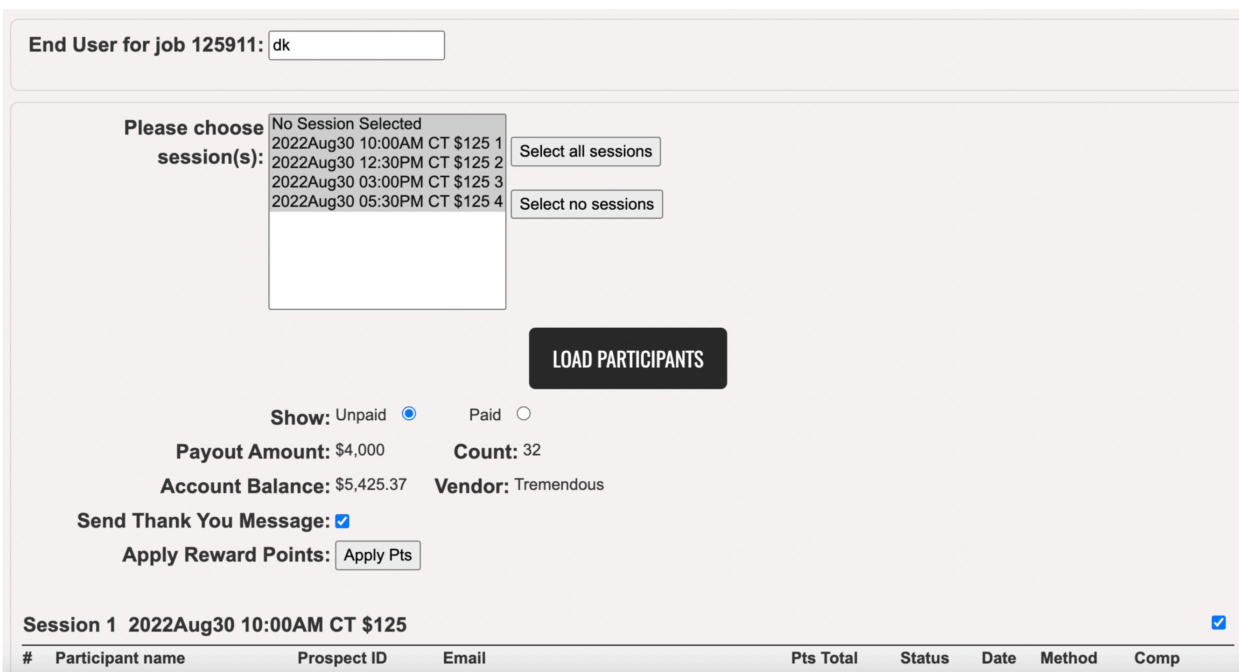
- **Tab1 – UnReconciled**: Job End date < current Date, and Job history has NOT been recorded (No History table records for that job). This is a job Ready for Reconciliation.
- **Tab2 – Not Archived:** Job with prospect records with a status <3 and History record found for job (i.e., it has been reconciled). This is a job ready for Archiving.

ADMINISTRATION

<u>E-Pay</u>

Currently OW supports four (4) payment providers: Tango, Neocurrency, Rybbon and Tremendous. Configuration of the payment provider is found under Admin on the Company Integrations page.

You will need support to fully configure this feature as the pay password is not visible or changeable by a user.



Using ePay:

- Enter job number
- Select session(s) to pay
- Decide if you want to send a separate thank you message.
- Optionally the Reward Points could be applied, adding them on top of the payment amount using exchange rate (currently it's 50 points = $10)
- Make sure the Account balance exceeds the Payout amount
- Click Pay
- Enter password

<u>Clients</u>

This program is needed for the SaaS clients who don't use an external CRM system to manage their clients and jobs. To activate the built-in Client DB, go to Administrator → Integrations, switch Client DB to OW and Save. Now all the clients and jobs could be created and edited directly in OW.

- To add a client click Add Row button
- To edit a client: Search & Edit
- Each client has the following fields:
  - Client ID: assigned automatically
  - State: Dropdown of US states
  - Status: Active / Inactive / Lead – Only active clients are available for pickup on Edit Job
  - Company Name
  - City
  - Zip (optional)
  - Phone Number (optional)

<u>Funding report</u>

Funding report is available both via Administrator → Funding Report and as a cronjob running every Sunday at 2am to notify admin about upcoming payments to respondents. The goal of the report is to alarm administrator to top-up the Payment System balance to pay all the outstanding payments to respondents.

What it does:

- Gets all the jobs that are ending this week (or if specified otherwise, uses the period selected by user)
- Calculated total outstanding compensation to be paid by job (pstatus > 2, participation is Used, P/S and no payment sent)
- Missing balance is calculated as *Grant Total – Account Balance*

<u>Company</u> (Prefs)

Everything that is under Administrator → Company is related to the system-level preferences and settings. There are several sections switched by a dropdown menu at the top of the page:

>Preferences

Preferences tab contains the general Company information like Company name, Address, Phone, Fax, Logo, Footer Title.

>Hours

Office work hours for every day of the week Monday to Sunday. If the row is marked as inactive (Active = No), it means it's a day off. This schedule is used for planning the callbacks.

>Callback limits

Callback appointment limits gives a flexibility to set up callback limits for each hour Monday to Sunday from 8am-9pm. It has total number of calls that could be handled during the given hour. Usually, it's considered that one call takes no longer than 15 minutes slot. Meaning that if the hour limit is set to 4, every quoter of an hour could serve just one call. Knowing the employees schedule and workload we could fine tune this limit matrix to optimize the callbacks during the day and during the week.

>Holidays
A list of public holidays could be updated here. These holidays are not reoccurring but are scheduled in advance as they have a complete date including year. If the date is marked as holiday, no callbacks could be scheduled for this day.

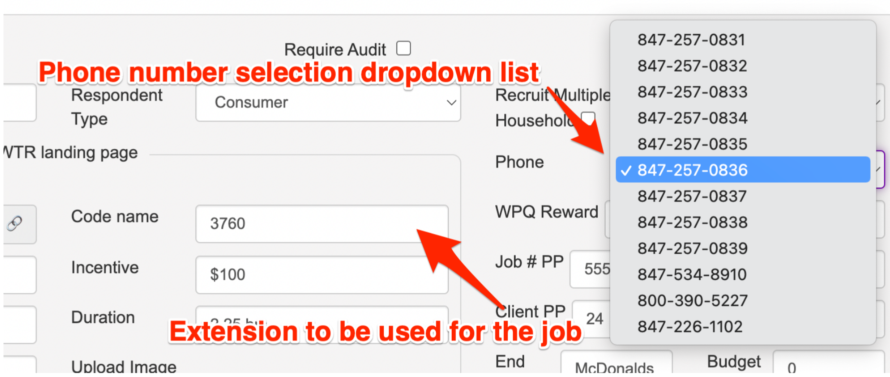
>Research Venues
Research Venues also known as Locations are the places where the studies are held. They are used as session details. One research venue contains the following information:

- Venue Name
- Address, City, State, Zip
- Phone number, Contact Person
- Parking (Free / Validated / Paid) and Parking cost if not free
- Location time zone: ET / CT / MT / PT.
- Active checkbox – If research venue is no longer used it can't be deleted but shall be deactivated instead. It won't be shown in dropdown in the Session form but will stay in the database as a reference for data integrity.
- Driving Directions – PDF upload with indications how to get there

>Phones
This is a list of company phone numbers for incoming calls. Each row includes:

- Phone number NNN-NNN-NNNN
- Active Yes/No
- Name – A label text to identify the line inside the company e.g., C1-C6, tall-free, company mobile number.

These incoming phone numbers are used in Screener to choose which line/phone number will be used for incoming calls for this job. Together with the phone number the respondents are communicated the Code name/extension.



>Virtual Employees
Virtual employees are kind of roles inside the company. Who is in charge of what. Here are the typical roles withing the company:
- Sample Outreach
- Registration
- Participant
- Hiring
- Social Media
- Phone Support
- System Manager

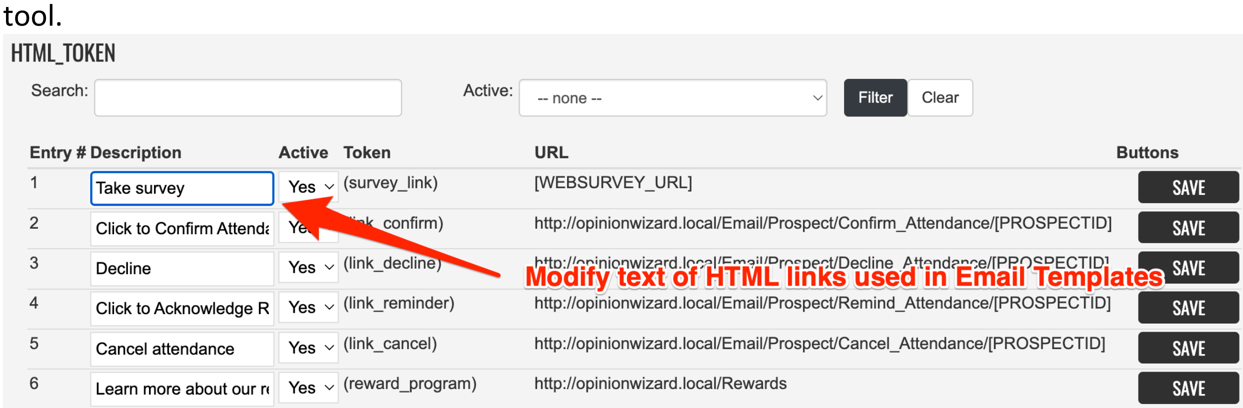
Each virtual employee has:
- Code name, just a text label of the role from the list above
- Active Yes/No
- Email address for the contact
- First, last name

Even though real people can come and go, these virtual employees always stay the same, only the email and real person name are updated.
These virtual employees are used for the automated email notifications when an action is needed in one or another part of the system.

>Integrations
Integrations contain all the settings for 3rd party services integrated to the OW system. We can logically divide all the integration settings into several groups:
- Clients DB: Clients could be managed outside OW, in an external system running FileMaker Pro or any other ODBC connected DB. Alternately a built-in clients db could be used. If you don't have your own CRM, activate OW clients DB and add the clients' info together with jobs.
- Mail Server: SMTP server connection needs to be setup to send emails. Any mail server could work, but for better deliverability we recommend using specialized tools like SendGrid.
- Web surveys: PS settings are needed to construct a websurvey URL.
- URL shortener: to shorten long URLs to be sent in a text a built-in redirect engine is used. To setup a short domain we need this URL Shortener Domain option.
- Idle Logout Timeout – period of inactivity (in minutes) after which users are automatically logged out of the system.
- Prohibit EDU emails – if this is active, customer studies respondents younger than 25 years can't use temporary or EDU emails.
- Social media links: Facebook, Instagram, Twitter, Yelp, LinkedIn.
- 1099 – to comply with 1099 taxation program, we need to have require SSN/EIN of individuals to overpass the revenue threshold for the current year. Here we set the threshold value (currently it's $600USD) and the tax form.

- Cookiebot is used for GDPR/CCPA compliancy. Users can give a full, partial consent or deny storing their personal data. A 3rd party tool is used to monitor the cookies and give users control over the personal data management.
- Email verification – To validate users email addresses during the registration we use a 3rd party service provider MillionVerifier that checks whether this email address exists, if it's temporary, catch all or invalid. If this service is active a valid API key is required.
- Household Count is a limit for household list in the HH manager search. If the list is longer user is asked to narrow down the search criteria.
- E-Pay provider – OW makes use of electronic incentive payments. Currently, we support 4 systems: Rybbon, TangoCard, NeoCurrency and Tremendous. You need to pick up one you going to use. First, we recommend setting up a Sandbox account to test the system, then when everything is working fine a Live account could be activated by switching the E-Pay to Live and storing the Live API key. Depending on the E-Pay provider you choose you might also need specify some extra settings. Please check the chosen provider documentation or contact us for extra support.
- E-Pay password – to secure the electronic payments, this program is protected by an extra password. It could be changed in Administrator → Company → Integrations → Change E-Pay Password section.
  Note: the password is encrypted and can't be recovered. Please be careful and store the password in a safe place.

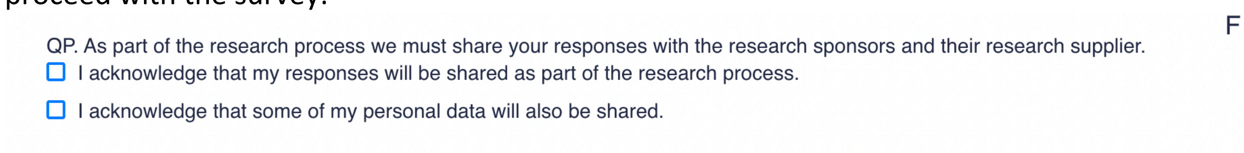
>HTML tokens
Email templates contain tokens/placeholders that are replaced with actual values when this email is being sent. Some of these tokens are links with text that needs to be customizable. For example, survey link has text: "Take survey", which can be easily modified using HTML tokens tool.



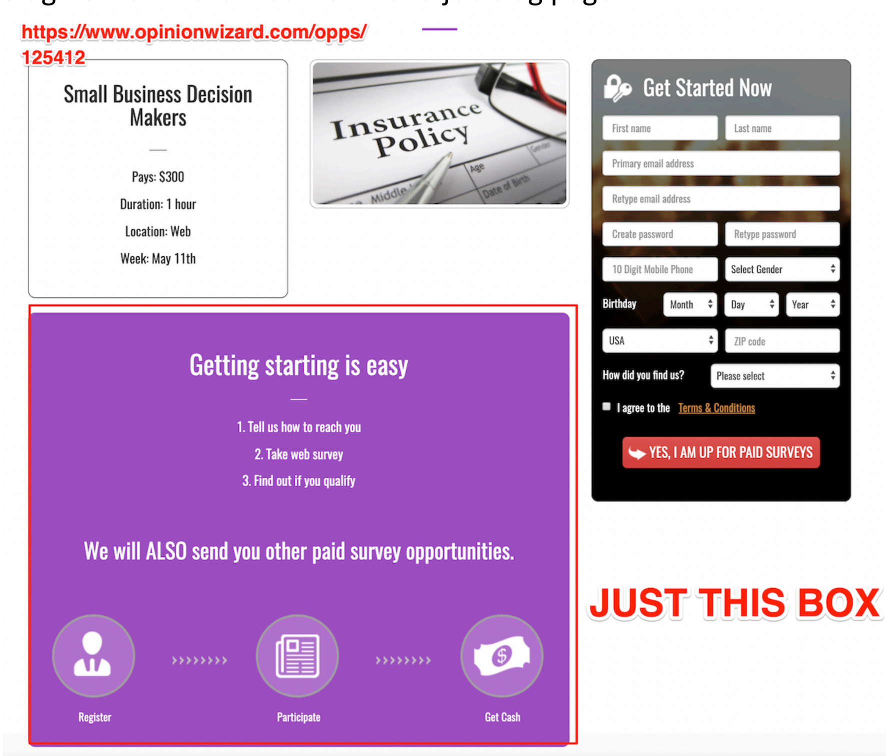
>Website Messages
This tool is a content management system to modify all the content from the website. Every block of content is available for edit in an accordion HTML editor. It has the following blocks:

- Consumer Main Message – home page main content block with video
- Consumer box message 1-3 – these are the blocks from the consumer-facing home page with highlights of the main features and the benefits of OW

- Pro Main Message – Same as Consumer Main Message but for professional-facing homepage. This website is available under https://YOURDOMAIN/pro URL
- Pro Box Message 1-2 – same as Consumer box message, but for professional respondents
- Terms & Conditions – the text shown to user during registration with a checkbox for accepting the terms
- Privacy – like Terms & Conditions, a Privacy Agreement with a checkbox for consent are given to user on the registration
- Survey Privacy Statement, Question and two Statements – this is the content for the Privacy Question type in the Survey Builder. PS fetches these texts from OW preferences to display the Privacy Question to user. Users must agree on these both statements to proceed with the survey:



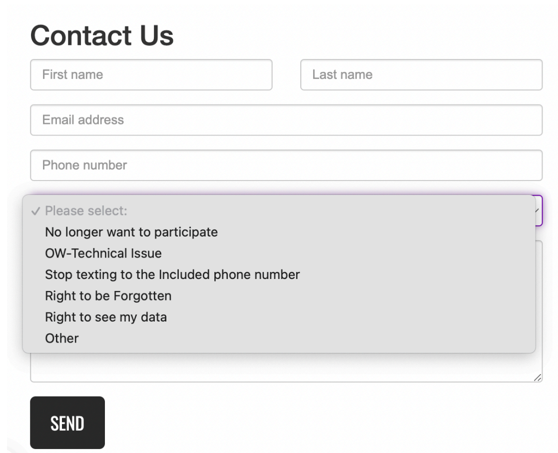
- Slug Content Card – content for a job slug page:



- Landing pages content: WPQ, WTR, Self-Scheduling, Multi-Session Self-Scheduling
- Participation Sign In Sheet – text used in Reports → Sign In Sheet report
- About Us – company information, shown on the public website About Us page (https://YOURDOMAIN/AboutUs).
- Rewards – Content for the Rewards page (https://YOURDOMAIN/Rewards) with conditions on rewards points: what they are given for and how to convert them into cash.

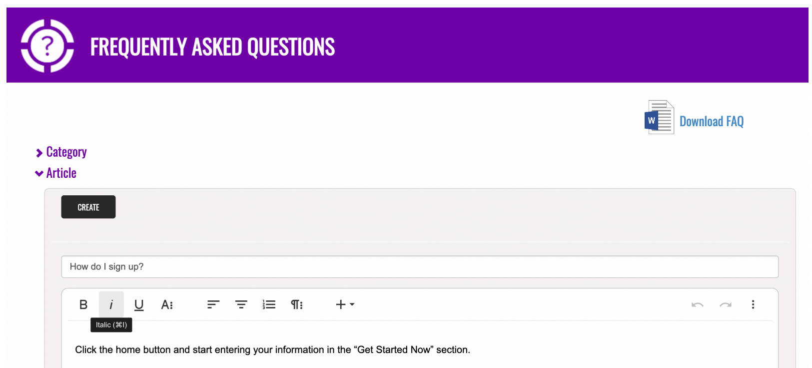
- Email Signature – template content for an email signature for automated emails sent by system, contains employee name, email, company contacts and unsubscribe link.

>Contact Reasons
It's a lookup table with the typical reasons for contact using our contact form on Contact Us page. Every reason has an associated contact email address of an employee. Based on the reason selected, an automated email will be sent to corresponding employee. Contact form is protected by CAPTCHA to avoid SPAM traffic.



>FAQ
Frequently asked questions edit screen has categories and some questions and answers inside them. This FAQ is shown to users of the website on the FAQ page in public website. Admin can:

- Add new categories
- Edit or delete categories
- Reposition categories using up and down arrows
- Create and edit existing articles/questions
- Move existing articles between categories
- Delete articles
- Download the whole FAQ as a Word doc

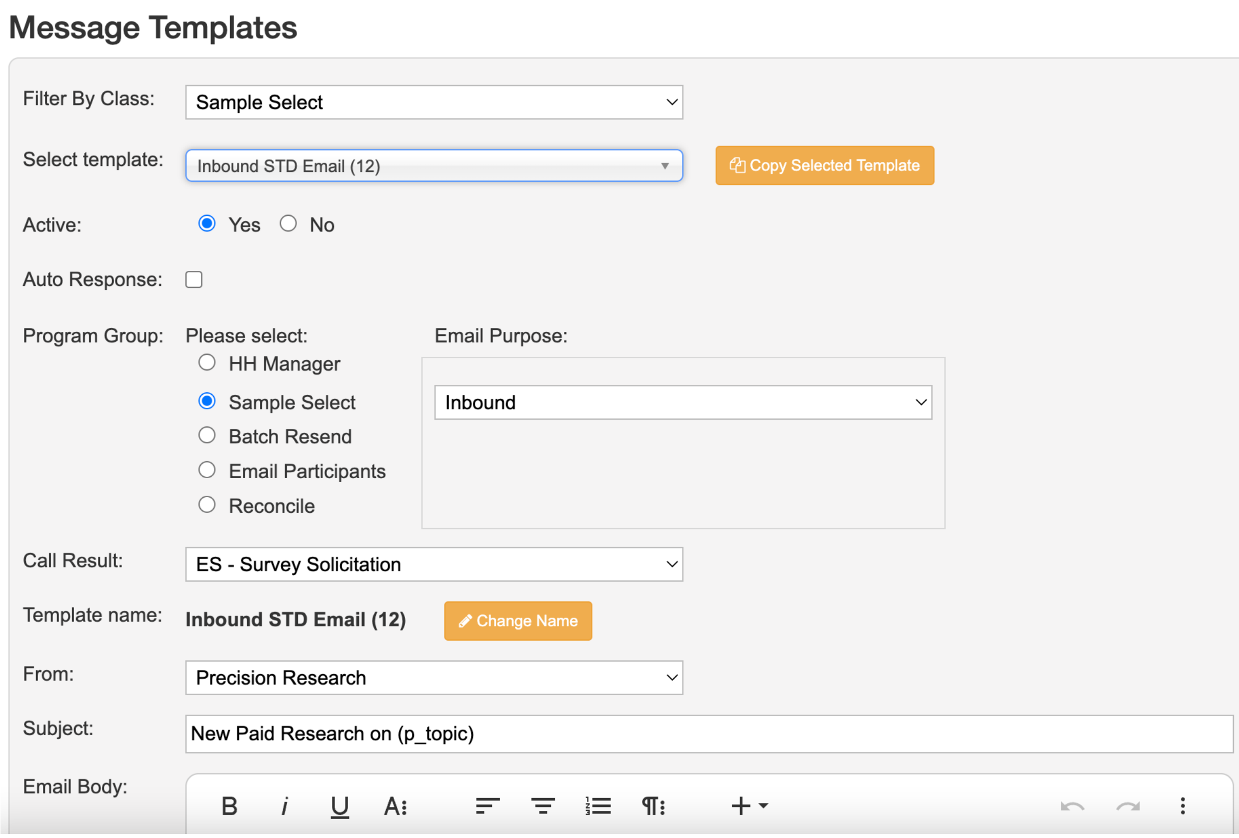


>Clients
Same as Administrator → [Clients](#) and Manage → [Client Edit](#)

>Access Control – users access to programs
It's a matrix of permissions for every page by user role. Each row is a page name linked to the corresponding page. Each column is a user role with permissions for each page Yes/No.
This page doesn't have capability to change the permissions, just to show the table of ACL.
These permissions could be altered on request. Here it serves just the consultation goal.

<u>Message Templates</u>
There are over 75 email/text messages in the system.
You can change the Subject, Body and Sender (from) virtual employee.
YOU MUST NOT DELETE ANY of the messages or automated feature of the system may not function properly. Watch [our video](#) on how to use the message template system.

HTML TOKENS – These are hyperlinks you can include in email message. Consider the HTML Token wording as you craft messages. You can change the token wording if needed under Administrator → Company → HTML tokens. Ex: when a message has (survey_link) the message will read..."Take survey"



Automated Messages

- Opt-In (1) – sends an email with an opt-in link to verify email address. Also includes the *Tell a Friend* link that generates email that is sharable and gives credit when friends register.
- Incomplete Fresh (2) — sends an email to Individuals that started but did not complete registration in past 6 days.
- Password Reset (3) – Sends an email with a link to reset the password. The link expires in 12 hours.
- Incomplete OLD (7) – Same as (2), but it sends email to Individuals that started but did not complete registration over 3 months ago.
- Tell a Friend (23) – this is a message that is crafted to be shared with friends. It contains the referral link that will give the Individual credit for the friend who registered. That friend must complete the full registration to get credit.
- Auto Respondent Cancel (24) – Sends an email to us informing that a respondent has cancelled. When generated the system have already removed that respondent from the project and disposition them as canceled.

- Confirm Cancel (25) – This email is automatically sent to respondents that cancel acknowledging that we got their cancellation notice.
- Opt-in Email Indv Add (26) – The message is sent to a person who was registered (added) by another individual in the HH. It requests that they verify their email address.
- Opt-in Email Change by Other (28) – The message is sent to a person whose email address was changed by another individual in the HH. It requests that they verify their email address.
- Opt-in Email Change Indv (36) – The message is sent to a person who changes their own email address. It requests that they verify their email address.
- Thank You – Terminate (37) – When prospects are dispositioned as Terminate the system sends this email thanking them and informing them that they earned reward points.
- Thank You – Standby (38) - When prospects are dispositioned as Standby (OQ) the system sends this email thanking them and informing them that they earned reward points.
- Thank You – TSS (39) - When prospects are dispositioned as Terminate Save Screener (TSS) the system sends this email thanking them and informing them that they earned reward points.
- Young Minors (40) – The system looks for minor that reach age 14.5 to add to an update batch so they can be solicited for phone and email address. At the same time this email is sent alerting the parent that we are now collection direct contact information for their child.
- Unreachable (43) – As we discover that all phones HH members are not reachable and we disposition them as Lost Contact Email (LCE) while recruiting, this message is sent asking them to call or login to update their contact information.
- Text for Email (44) – This is a manual process, when an adult has no email address a button to send a Text for email address appears in the Individual contact section, asking them to call and provide an email.
- Unconfirmed participants (53) – Then system sends this message nightly to alert supervisors if there are unconfirmed participants for a specific study.
- Old Minors (57) – Like Young minors, the system looks for minor that reach age 17.5 to add to an update batch so they can be solicited for phone and email address. At the same time this email is sent alerting the parent that we are now collection direct contact information for their child.

As you may already know Professional respondents don’t need to fill in all their Household details. However… Other individuals in the same household who are not Professionals should get an incomplete email if the HH is incomplete.

Lookup (Lookup Tables)
Lookup tables are the method used to customize many aspects of the system, including, profile question for respondents, system operation settings, and more.

Lookup Table Names – Most look up tables are found here and are easily understood.

- Rules:
    - New items can be added to a table, generally without limitation.
    - Items cannot be deleted as they may have been used. Deletion would break the system
    - Items can be made inactive, so they do not appear.
    - Most tables can be filtered based on status (active, inactive or both)
    - Most tables can be reordered
- Special Tables: (should not be altered or altered with care)
    - Email_Queue_Type: This table allows the setting of the mail sending rate for different type of system messages. In general, there will be no need to change anything in this table.
    - Tasks_Update_Email: This table allows you create an update program which will send update profile messages created in Template manager. These messages are sent using their corresponding queue schedule. When completed status is updated.
    - Call_Results: This table contains the type of the outcome of the call, whether it alters a prospect status, if it's an email, whether it's reached or missed. All these parameters effect the system behavior. The records in this lookup table shall be deleted or altered. Otherwise, the system could work incorrectly.

>Travel Areas

To edit the list of TA (Travel Areas) you first need to select a Metro Market from the dropdown list. It'll load a list with TA. Records could be added to the list, existing ones could be edited or deleted (only if not yet used, otherwise use Active = No).

>Zip Metro

Should not be altered or altered with care. It contains a list of zip3 codes for each Metro Market.

>Individual Attributes

Individual attributes are split into categories. Traditionally we have 3 categories: Required Information (mandatory attributes), Health Issues (good to have) and Activities. However, the categories could be changed using Lookup tables → indiv_attr_categories. Then the new categories could be used here to fill in with the attributes. Each attribute has a pair of extra columns:

- ➢ Restricted Question — whether this question is hidden from respondents and contains some internal information for employees inside the company
- ➢ Adult/Child — Has Child, Adult or Both

>Vehicle Brands/Models

Car models are listed by brand. Picking a brand from dropdown will list the models. Every year there are new models, so these lists need to stay up to date. At the same time old models could be retired/deactivated. A vehicle has: name, brand, and the vehicle class. Car brands could be edited in Lookup Tables → vehicle_make, classes are available via Lookup Tables → vehicle_class.

>Emails Class Purpose
Should not be altered or altered with care. There's a hierarchy Email Class → Email Option → Email Template. The classes are strongly tied to the system logic and shall not be altered. They are:

- Auto Response
- HH Manager
- Sample Select
- Batch Resend
- Email Participants
- Reconcile

Organizations (charitable orgs)
Occupation & Occupation Link

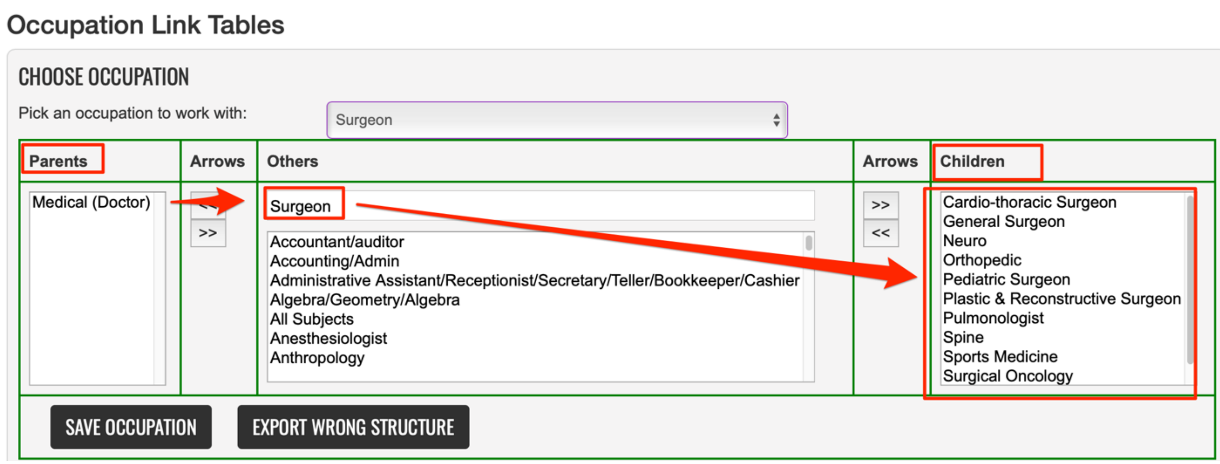
a. The Occupation lookup table is used to create, edit, and delete occupations. They can also be made inactive.
b. Occupations have relationships.
    i. They can be subordinate (child) to a category, or they can be the parent (the top of a category). They can also be both above some occupations and below others.
    ii. EXAMPLE: Medical (Doctors) → Surgeon → Orthopedic
    iii. In this above example the top level is Medical Doctor, under this Parent Occupation there are several Occupations, one of which is Surgeon. Surgeon is a child to Medical (doctor) but a parent the Occupation Orthopedic. Since Orthopedic is a subspecialty of Surgeon it is a child of the Surgeon occupation.
    iv. A second example: Teacher → Grade 9-12 → Science
c. To delete occupations.
    i. Occupation cannot have any relationship (parent or child)
    ii. First the parent child relationship must be removed in Occupation Link (manager).
    iii. Then you can use the occupation lookup table to delete and occupation.

iv. Keep in mind that some individuals may be using that occupation so it may be better to make it inactive rather than delete it.

Occupation Link Table

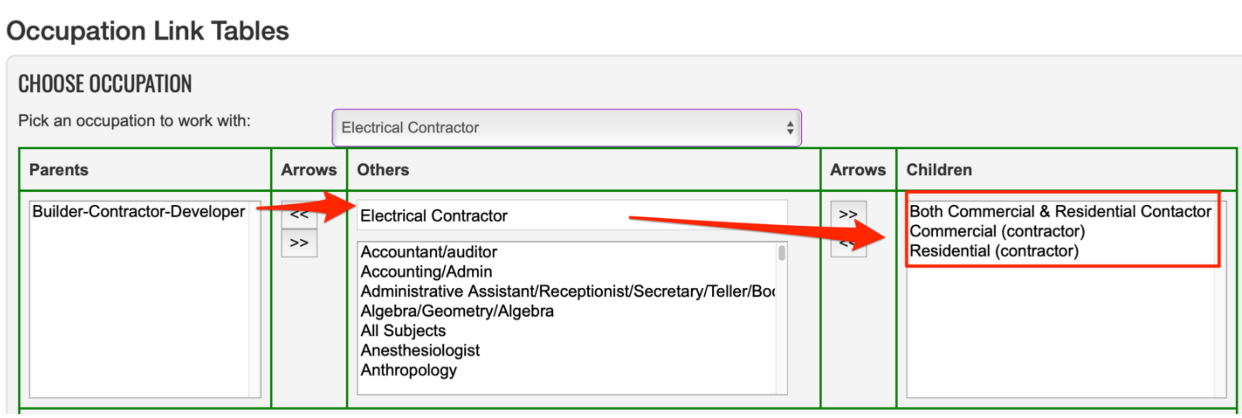
Occupations in OpinionWizard are multi-level. For example, a Doctor can also be a surgeon and can also specialize such as Orthopedic. The main Occupation Lookup table is just for entering all the possible occupations the LINK TABLE tool creates relationships between the Occupation descriptions.

In the example below we can see the Medical doctors (Parent) has a Child called Surgeon, and the Surgeon is also a Parent to several Surgical specialties.



Here is another example in the world of construction.

A person who may consider themselves and Contractor is actually an electrical contractor that work on either commercial, residential or both commercial and residential projects.



These relationships can help when it comes time to find respondents for a project.
Watch our video for an explanation on how to create and remove relationships.

Archive Job

Archiving a Job

- Archiving is Performed from the Admin Menu and should be periodically
- Archiving a job deletes the following records
    - Batches – Creating during Sample Select
    - Batch runs, both scheduled and instant
    - Criteria – Created during Sample Select
    - Prospect record for all who were not screened or screened and terminated in any way (pstatus <= 2 OR participation is not used or paid and sent)
    - Calls – Communication history records
    - Email records
    - Short URLs
- The following is not deleted
    - Jobs Screeners
    - Sessions – in Job
    - Survey data
    - Prospects that were invited

Bulk Carrier Update – Allows for mass update of mobile carriers
Export HH & Indv Profile – for GDRP and CCPA compliance
HH/INDV Delete – Delete HH and Individuals based on unresponsiveness

Reward Drawing

Validate Emails – Allows for mass validation of emails

Purge Unreachable – not sure how this is finding records.

FAQ – Used to Create and Manage

Recruit Count

Reward System:

The reward system is designed to encourage continued participation by provided points for various activities.

The current activates that are reward eligible are:

- Updating the Household and/or Individual profiles. Credit is limited to 4 times per year, once per quarter.
- Referring people to join the database. There is not limit on this activity.
- Disqualifying when taking online screeners – 1 time per project
- Disqualifying during a telephone screener – No limit as there may be time when you need to have prospects retake a revised online survey.

The limits and point values are customizable in the Administrator Lookup table system