



## Redesign Schedule UI for Batch Recurring Campaigns

01/21/10

# Options

- Option 1 - Two buttons on web page
  - Run Now
  - Schedule Campaign
- Option 2 - Single button on web page
  - Keep pop up combined
  - Persist 'Run Now'

# Two Button Option

**Campaign Status:** Last run: Aug 31, 2009 11:37 am PST

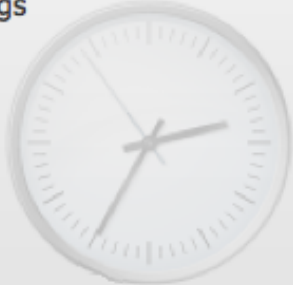
**Smartlist Mode:** Batch

**Qualification Rules:** [Run flow every time](#)

**Smartlist Status:** Set to affect around 0 existing leads  
(May change over time)

Around 0 are blocked from mailings

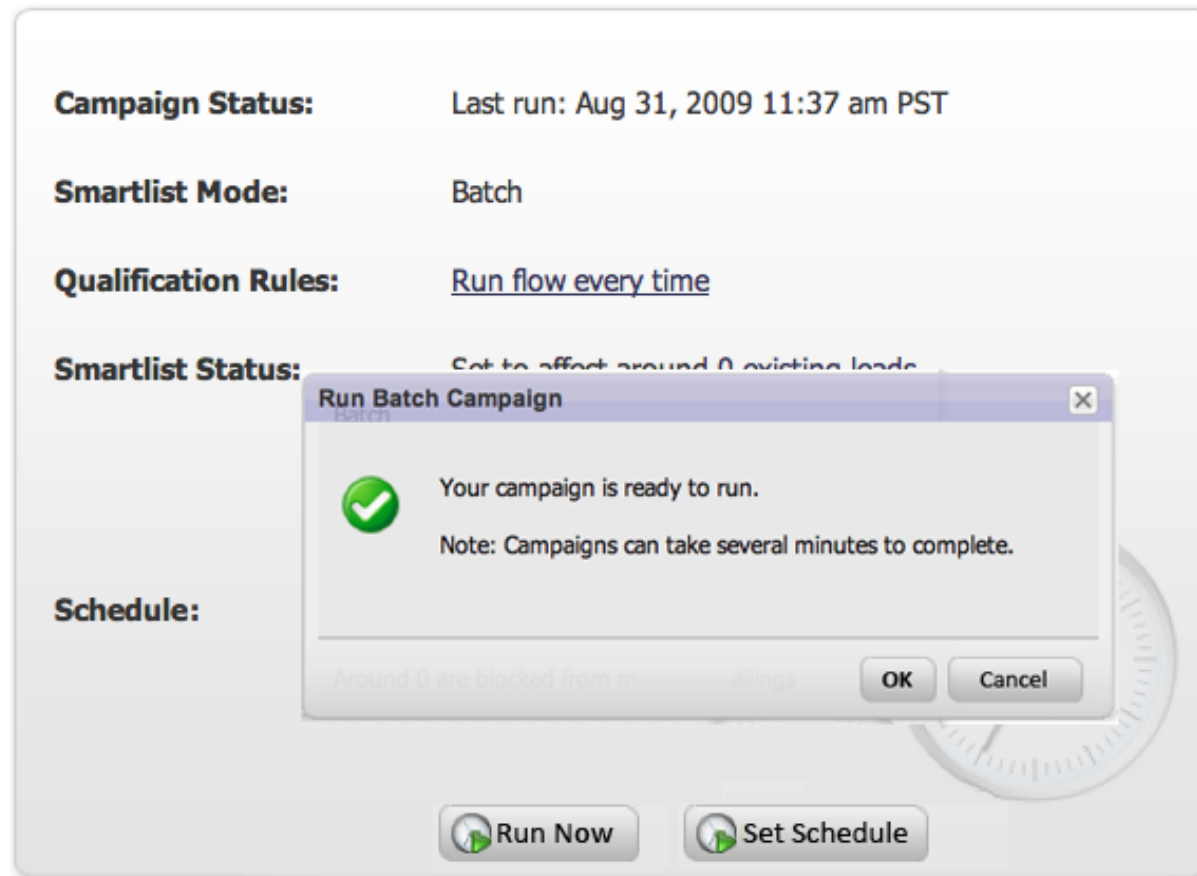
**Schedule:** No schedule set



[Run Now](#) [Set Schedule](#)

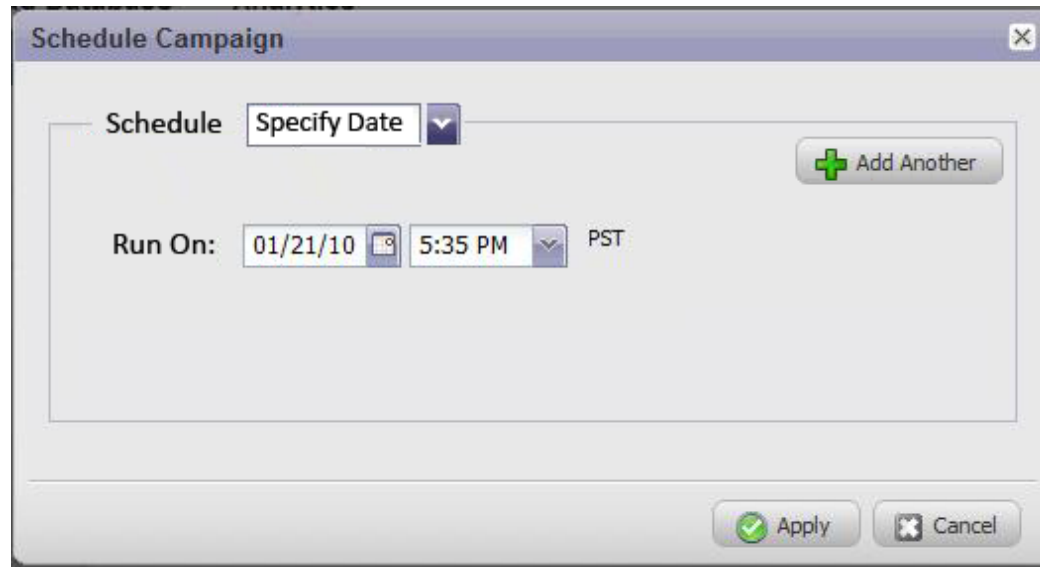
- Two buttons
  - Run Now > Triggers system check
  - Set Schedule > Triggers pop up for repeat scheduling

# Click on Schedule tab



- Confirmation
  - Open Issue – Button Names
    - OK, Continue, Run

# Set Schedule - Specify Dates



- Changes
  - Remove Start On
  - Include Run On to allow the user setting a specific run date

# Repeat Schedule – Monthly / Daily

**Schedule Campaign** [X]

Schedule: **Monthly** [v]

Run On: 01/21/10 [calendar] 5:35 PM [v] PST

Repeat every:  Day 1 [v] of every 1 month(s)  
 The [v] of every [v] month(s)

End Date:  Continuous  
 01/21/10 [calendar] 5:35 PM [v] PST

[green checkmark]

**Schedule Campaign** [X]

Schedule: **Daily** [v]

Run On: 01/21/10 [calendar] 5:35 PM [v] PST

Repeat every:  1 days  
 Every weekday

End Date:  Continuous  
 01/21/10 [calendar] 5:35 PM [v] PST

[green checkmark] Apply [X] Cancel

# Option 1

- Pros
  - Persist the one click 'Run Now'
  - Clearly allows for additional scheduling
- Cons
  - Is it confusing to have both 'Run Campaign' and 'Set Schedule'
  - Technical issues of system setting conflicting redundant schedules

## Option 2

- ▶ Single button on web page
  - Keep pop up combined
  - Persist 'Run Now'
  
- Pros
  - One pop up
  - Surfaces the new functionality
  - Persists the run now
  
- Cons
  - Removes the one click 'Run Now' option
  - Combining the 'Run Now' 'Run On' with Repeat may be confusing



# Single Button Option

<b>Campaign Status:</b>	Last run: Aug 31, 2009 11:37 am PST
<b>Smartlist Mode:</b>	Batch
<b>Qualification Rules:</b>	<a href="#">Run flow every time</a>
<b>Smartlist Status:</b>	Set to affect around <u>0 existing leads</u> (May change over time)
	Around 0 are blocked from mailings
<b>Schedule:</b>	No schedule set



 Run Campaign

# Single Dialog

**Schedule Campaign** [X]

**Schedule**

Run Now

Run On  [calendar icon]  [dropdown] PST

Repeat  [dropdown] + Add Another

Rerun  [calendar icon]  [dropdown] PST

Apply  Cancel

# Option 2

- Pros
  - One pop up
  - Surfaces the new functionality
  - Persists the run now
- Cons
  - Removes the one click 'Run Now' option
  - Combining the 'Run Now' 'Run On' with Repeat may be confusing

# UI Design – Consensus for Schedule UI



**Campaign Status:** Last run: Aug 31, 2009 11:37 am PST


**Smartlist Mode:** Batch

**Qualification Rules:** Run flow every time

**Smartlist Status:** Set to affect around 0 existing leads  
(May change over time)

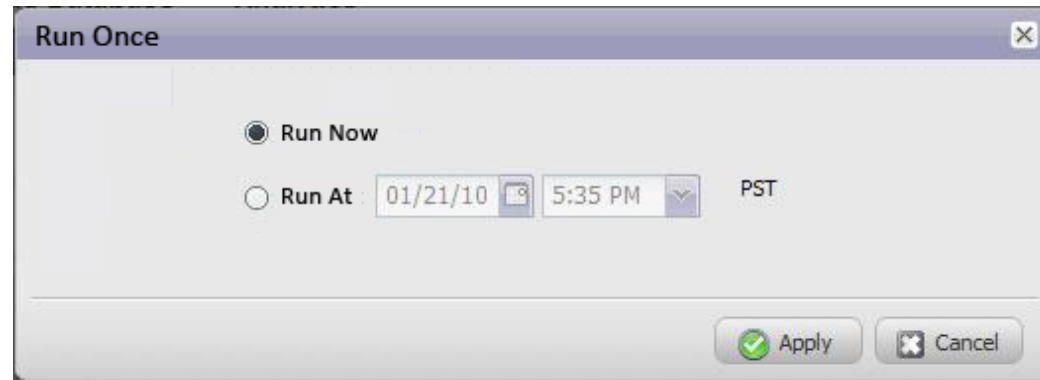
Around 0 are blocked from mailings

**Schedule:** No schedule set



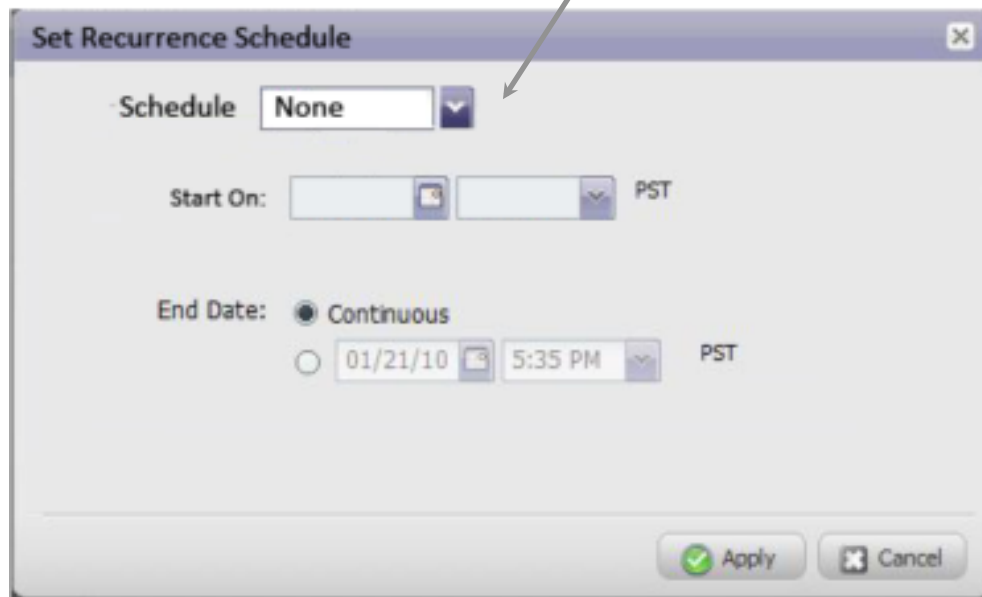
Distinguish single runs from setting recurring runs

# Run Once Button Selected - Run Once Dialog



# Set Recurrence Schedule Button

Select a recurrence pattern.  
Allows for an initial start date.



**Set Recurrence Schedule**

Schedule: **None** ▼

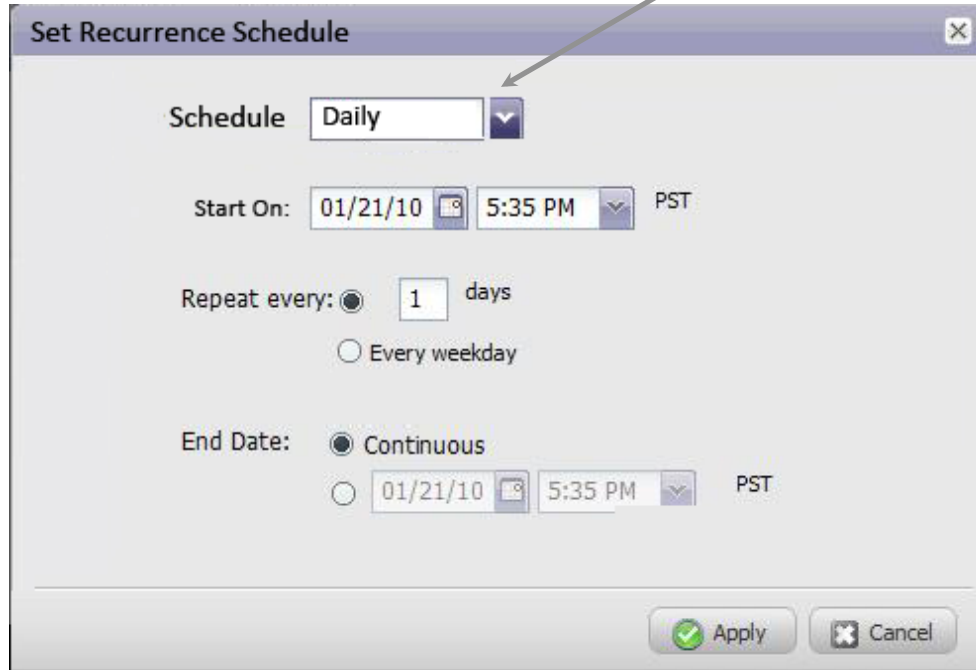
Start On: [ ] [ ] PST

End Date:  Continuous  
 01/21/10 [ ] 5:35 PM [ ] PST

Apply  Cancel

# Set Recurrence Schedule – Daily

Select recurrence time frame.



**Set Recurrence Schedule**

Schedule:

Start On:   PST

Repeat every:  1 days  
 Every weekday

End Date:  Continuous  
   PST

Apply  Cancel

# Weekly

UI Changes to reflect time frame selected

**Schedule Campaign**

Schedule:

Start On:   (PDT)

Repeat every:  week(s) on:

Sunday  Monday  Tuesday  Wednesday  
 Thursday  Friday  Saturday

End date:  Continuous