

General

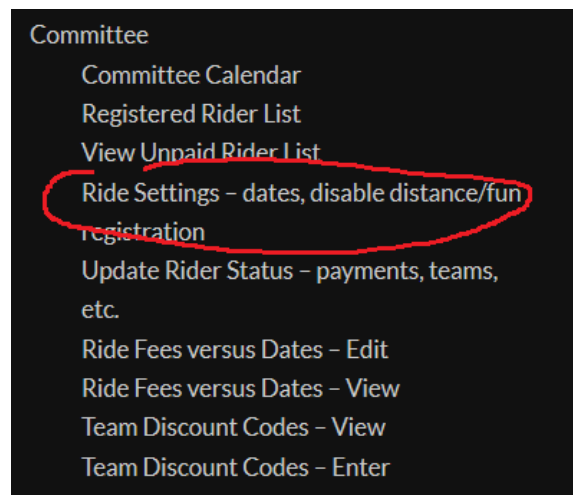
Tools: The following are a list of website tools that are used to support the Primavera Registration process. The Schedule section will describe when those tools would typically be used.

1) Ride Settings - Setup all parameters for each year's event

Summary: Use this tool to setup various configurations for the website for the years Primavera Event

Webpage location of tool: <http://ffbc.org/primavera/primavera-committee/primavera-ride-settings/>

Menu Location:



Details: Can setup the following configurations. Select “Submit” after the selection is one.

- a) Year of Ride
 - a. Used as a heading for various forms and indicates what forms are used
- b) Global registration – open and close date
 - a. Presently not used. Will be used in enabling the registration form.
- c) Earliest/Latest date for ride statistics
 - a. Defines the date range used in the “Committee>Stats” section of the website when creating the ride statistics.
- d) Max Distance Riders

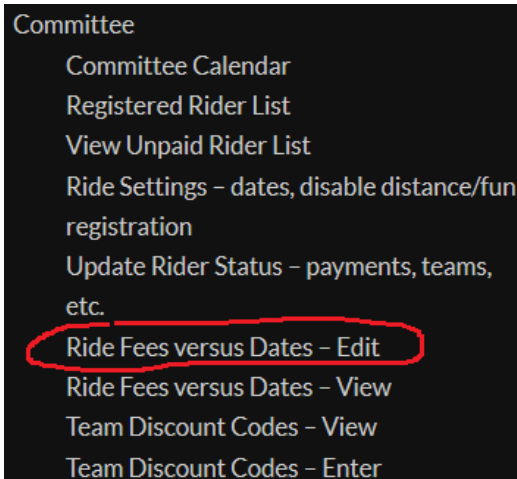
- a. Presently set to 1030. For the moment this setting is not used by any software.
- e) Distance Ride Enabled
 - a. At start of registration should be set to Yes
 - b. After this ride is full should be set to No. When that is done, the registration form no longer offers Distance Rides
- f) Max Fun riders
 - a. At start of registration should be set to Yes
 - b. After this ride is full should be set to No. When that is done, the registration form no longer offers Fun Rides
- g) Fun Ride Enabled
 - a. Presently set to 200. For the moment this setting is not used by any software.
- h) Clothing sales enabled
 - a. At start of registration should be set to Yes
 - b. After the clothing order deadline is met then it should be set to No. When that is done, the registration form no longer offers clothing

2) Setup Ride Fees and Date ranges

Summary: This tool sets up the ride fees for all rides by a date range. For example, \$65 for distance up till Dec 31st, \$75 till Jan 31st, etc.

Webpage location of tool: <http://ffbc.org/primavera/primavera-committee/primavera-ride-costs-and-dates-test/>

Menu Location:



Committee

- Committee Calendar
- Registered Rider List
- View Unpaid Rider List
- Ride Settings – dates, disable distance/fun registration
- Update Rider Status – payments, teams, etc.
- Ride Fees versus Dates – Edit**
- Ride Fees versus Dates – View
- Team Discount Codes – View
- Team Discount Codes – Enter

Details:

If you would like to only view the Ride Fee Schedule (versus edit) you can pick the menu items just below this Edit version:

<http://ffbc.org/primavera/primavera-committee/primavera-ride-fees-versus-dates/>

For editing, first get to the proper entry page:

- a. Go to the above web page. This lists all the rides, but it's in a compact form. Click on green "Edit" in the far right middle of the page.
- b. The last years ride fees will be listed. This will be the easiest way to start so you don't have to re-enter all the rides.

Setup the following configurations:

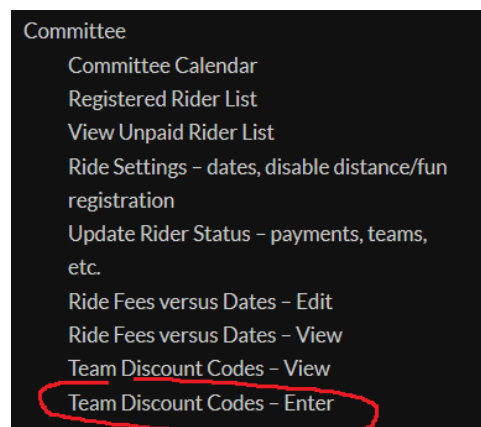
- c. Each ride has a number of entries. Each one is a different date range and fee. Edit those as appropriate.
- d. If you want to enter additional Ride Names, you can do so at the bottom of the page, with the button called "+Add".
- e. When done select Update at the bottom of the page.

3) Setup Team Codes

Summary: This will typically be done "as-needed" when someone requests a discount code for their team. So it may occur any time after registration opens.

Webpage location of tool: <http://ffbc.org/primavera/primavera-committee/primavera-team-discount-codes/>

Menu Location:



Details: This tool will list all existing Team Codes to minimize the change of using a duplicate name or code.

Follow the instructions – Enter a team Name and code. As a recommendation, each team code should be something like XYZ2017 or whatever the year is of the event – to make it easier for following years for the same team. Discount codes will need to be recreated every year.

Discount start date is when the code was created. The end dates are typically the stop of that year’s event.

At present there are only discounts for Distance Rides. They are not implemented for Fun Rides.

Full Discount means the ride price will be zero for this team. This is not fully working at the moment.

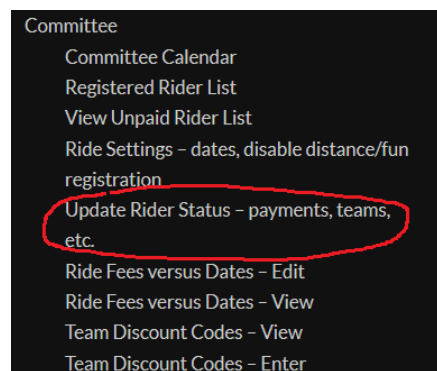
If you would like to just see a tabular view of all the teams and their discounts, choose the next menu item after the “Enter” tool: [“Team Discount Codes – View”](#)

4) Update Rider Status

Summary: This will typically be done “as-needed” basis. It covers updating payment status (check entry), adding someone to a team, processing a transfer, deleting an entry, and processing a refund.

Webpage location of tool: <http://ffbc.org/primavera/primavera-committee/primavera-update-payment-status/>

Menu Location:



Details:

- a) Register a Check Payment
 - a. Select "Payment"
 - b. As an aid, a list of unpaid entries will be listed
 - c. Under Transaction Type, select "Paid by Check"
 - d. Leave "Change Payment Status" as Yes.
 - e. Enter Registration ID and Last Name of person in the provided locations.
 - f. Also enter any transaction notes that might be helpful to someone later. Like a check number, etc.
 - g. Select Submit
- b) Transfer
 - a. The assumption here is that the buyer has filled out a Registration form using the "Transfer" selection. Make sure they have done that first so that you don't have to enter it yourself. But if this is a mail-in transfer where the buyer has filled out a paper entry form, then you will need to enter that form into the online registration. Once that is done, you will need to get the buyers Registration ID. That can be done by selecting the [View Unpaid Rider List](#) menu item. Find the transfer buyer on the list – note their last name and Registration (entry) ID.
 - b. Back to this form entry: select "Transfer"
 - c. Enter the Registration ID of the buyer and seller along with their last names into the locations provided.
 - d. Select "Submit"
 - e. If the entries match our records you will get a confirmation. If not you will get an error. In the error case please review the names and IDs to make sure they are correct.
- c) Delete an Entry
 - a. This is typically used for cleanup of the "UnPaid Rider" list. Usually these are entries from people who have tried to register and quite mid-process, or decided when they got to PayPal, to not pay. Often I see people retry at a later time and do a successful registration.
 - b. Select "Delete an Entry"
 - c. A list of all unpaid entrants is listed for reference.
 - d. Enter the Registration ID and Last name of person to be deleted.
 - e. Add a comment in the transaction notes for future reference, if we ever need to understand why this person has been deleted.
 - f. Select "Submit"
- d) Add someone to a team
 - a. Select "Add to a Team"
 - b. "How to Process". There are three choices on how to handle it: No Discount, Discount (you must tell the Treasurer to process), or add a note on registration entry that says to give discount money back on sign-in day.
 - c. Typically if we add someone later to a team, we don't give them the benefit of a discount. Ride Director (Andy) decides on these.
 - d. Look up the Team Name and select.
 - e. When done select "Submit"
- e) Refund
 - a. Refunds are special and normally not given out. It was done recently due to the route change but is otherwise rare. Normally we tell a rider to sell their ride registration on Craigslist or similar.
 - b. Select "Refund"
 - c. Enter the Registration ID and Last name of the Rider

- d. Add a note in the “Transaction Notes” section describing the reason for the refund and any other important background
- e. Notify the Treasurer to do the refund. It will have to be done manually (typically thru PayPal). The Treasurer will need the name, email and Registration ID of the person.
- f. Select “Submit”

Schedule of Activities

November:

- 1) Setup Site to enable registration
 - a. Involves turning on links to registration form
 - b. Changing all wording giving proper dates, etc.
 - c. Work with & support Primavera marketing person – who is writing the wording for the website.
 - i. Support any page updates – for example travelogue, etc.
- 2) Use the “Ride Setting” and “Ride Fee” tools to setup the parameters for this year’s ride and for the costs.
- 3) **Dec 1st:** Enable registration on web pages
- 4) **Dec thru April Ride Start:**
 - a. Use the “Update Rider Status” and “Setup Team Codes” as needed during this time.
 - b. Use the Ride setting tool to indicate when Distance or Fun rides are full.