



Guide for Rally Marshals and Booking Officers to the online rally application process

Processing online applications

The online rally application process went live late in the evening of 30th November 2020 and the first applications was submitted within minutes with over 100 by lunchtime on 1st December !

When a member makes an online application, the system automatically sends an email to the rally Booking Officer (or the Rally Marshal if there is no specific designated BO) with a copy to the member.

To access your online applications, you will need a login to the ICFR membership system – all ICFR members with an email address were sent an email with a link to setup their login in October and 42% of members had completed their user setup by 1st December 2020.

The login for the ICFR membership system can be found at <https://www.icfr-uk.org/LoginEntry.asp>

If you can't remember your login password, click on the link in the Forgotten Login panel for a reminder. If you haven't completed your login setup yet, you will need to request a new setup link from our Membership Secretary.

Once logged in, to view your rally application, click on View Rally List on the Rallies menu, then click on the View / Edit button for your rally.

When the Rally Details page opens, click on View Rally Attendees on the Rallies menu (NOTE: the menus are context sensitive and change depending on which page of the system you have opened).

When the Rally Attendees page opens, you will see a list that will look like this (I have already processed some applications, but have some new ones still to process). The list is displayed in order by Application Date (the ability to sort by Last Name will be added shortly) and there is a Status listbox for each entry and a View Application button so you can see full details.

Initially the Status will show Applied and accepting an application is simple – set the Status to Accepted and a row will appear allowing you to attach a document to the acceptance email (a programme booking form for example) and also a field for additional email text which can be inserted into the acceptance email.

Once you have set the Status on those you want to accept immediately, click the Update Dates/Status button and the system will update the records and send the acceptance emails for you.

You don't have to process every application immediately and you can place applications on the Waiting list by simply setting the Status to Waiting List. If you cannot accept an application, for example if they are bringing 2 dogs and the site only accepts 1 dog, you can reject an application by setting the Status to Rejected, but in this case you MUST put an explanation of why you are rejecting the application in the additional email text field.

First Time Ralliers

Rally applications will indicate whether they are from a first time Rallier. The system automatically detects whether there are any existing applications recorded in the system when an application is initiated and if not, the member will be asked to confirm whether the application is for their first rally or not.

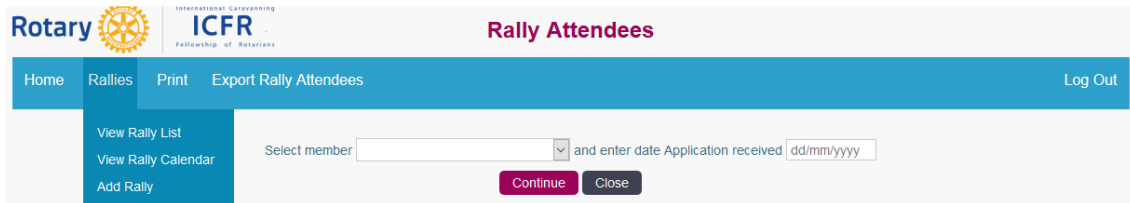
The system will also highlight first time Ralliers with their names in blue on the Rally Attendees page and on the printed Rally Attendees report.

You can order First Time Rallier plaques using the online Rally Signs order process below.

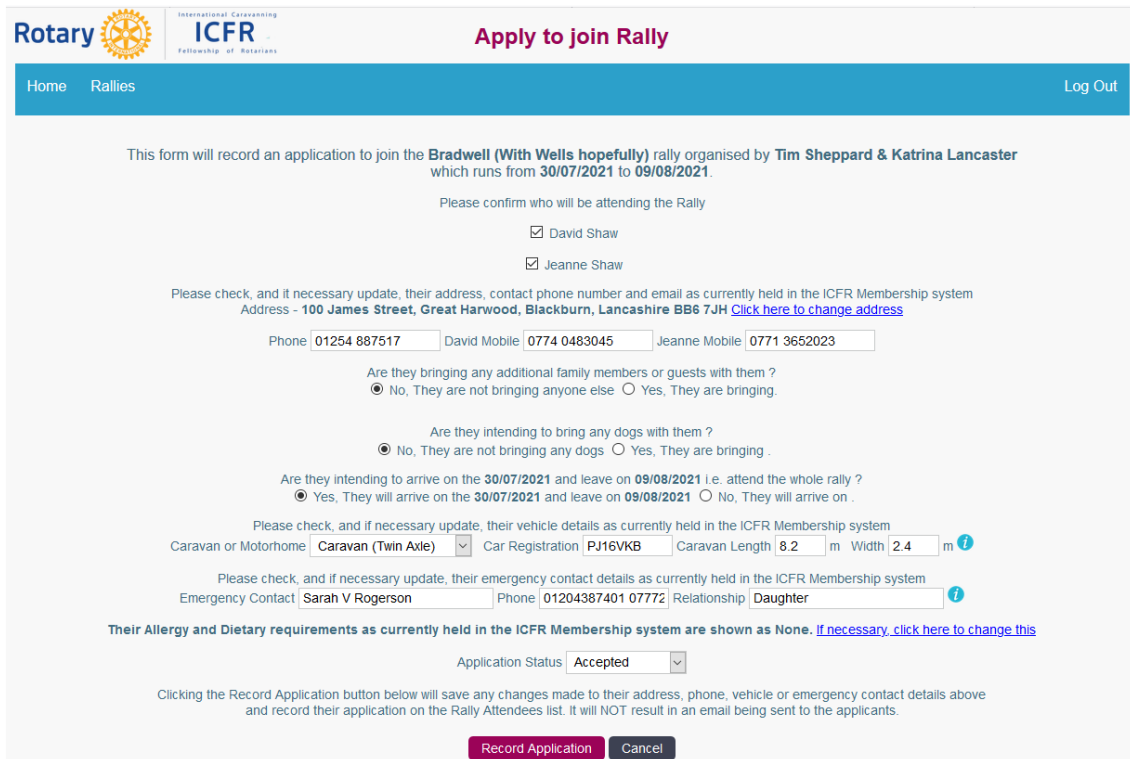
Manual (paper) applications

Inevitably some members will continue to use paper booking forms, at least initially, and we are asking Rally Marshals and Booking Officers to enter such applications into the membership system.

It is very easy to do, click on the Add Attendee button and you will be asked to select the member from a listbox and also enter the date the application was received.



Click Continue and the Apply to join Rally page will open with details from the members record in the Membership system.



Complete the various fields using details from the manual application and select the Application Status, then click Record Application. The validation rules are slightly different to those for online applications to reflect members failing to complete paper forms fully.

Deposits for rallies at time of booking

If you need to pay deposits to the site to reserve pitches, or to other suppliers for meal bookings etc, then you should request a deposit from members at the time of booking to cover such outgoings.

If you need to request a deposit at the time of booking, then you need to make sure the IT secretary has included details of the deposit and the basis for refunds on the website page.

To have a deposit requested during the application process, you need to enter the value in the Booking Deposit field of the Rally Details page, together with the Account Name, Sort Code and Account Number fields.

Rally Marshals and Booking Officers can edit these fields directly on the Rally Details page.

The Apply to Join Rally page makes clear that Booking Deposits are generally requested where sites require a deposit to reserve pitches or other rally activities require upfront payments. Refunds will be only be possible in the event of cancellation once funds have been committed if rally places can be re-filled or refunds obtained from sites / suppliers.

Own Attendance at Rallies

The system does NOT automatically include the Rally Marshall and Booking Officer/Assistant RM as attendees on your rallies. Rally Marshals often arrive and depart on different dates and there other questions on the online Application which can't be automatically completed, so the decision was taken that this would be a manual process.

The easiest way is to click Apply to Join Rally on the Rallies menu when the Rally Details page is displayed as this will open the Apply to join Rally page directly with your details already completed.

Alternatively, you can use the Add Attendee button on the Rally Attendees page and select yourself in the Select Member list. The only (minor) benefit of this method is that you can manually choose an application date so that you appear at the top of the attendee list.

Printed Reports and Export of Attendee details

We have created 2 printed reports so far which Rally Marshals and Booking Officers can use, plus an Export of Attendee details in a csv file which can be opened in a spreadsheet such as Excel and an Export of Attendees email addresses as a string ready to copy into the BCC (Blind Carbon Copy) box of an email. (see below for more details on sending emails to attendees).

The reports and exports are accessed from the menu of the Rally Attendees page.

NOTE: The system logs that you have printed reports or exported data and will display a warning on the Rally Attendees page if any attendees have updated the relevant fields of their membership record so you know that you need to print a new report or re-do an export.

Sending emails to Attendees

For security reasons, web browsers restrict what web pages are allowed to do to your computer. The Membership system can't therefore open your email system and set a list of email addresses in a new email.

What it can do is create a list of email addresses for you to download, copy and then paste into the BCC (Blind Carbon Copy) field on your email.

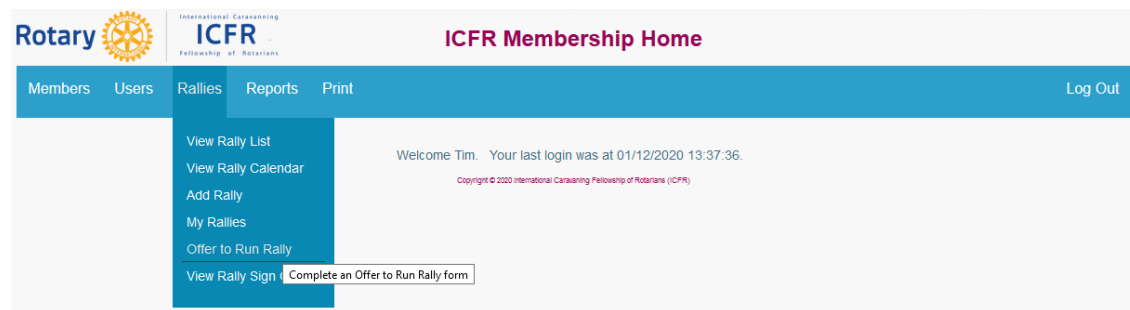
You can do this on the Rally Attendees page using the Export Rally Attendees menu – make sure the Export as email BCC string option is selected and click Export. This will download a small text file with a list of email addresses for your attendees which you can open, then copy the list and paste it into your email.

Using the BCC field instead of the To field means that a copy is sent to all the addresses in the list, but the list of email addresses is not visible to everyone – good GDPR practice.

Offer to Run Rally

The Offer to run a Rally form is now available within the ICFR Membership system and can be completed by any member who has an idea for a rally and is willing to act as Rally Marshall.

The online form is available on the Rallies menu of the ICFR Membership Home page.



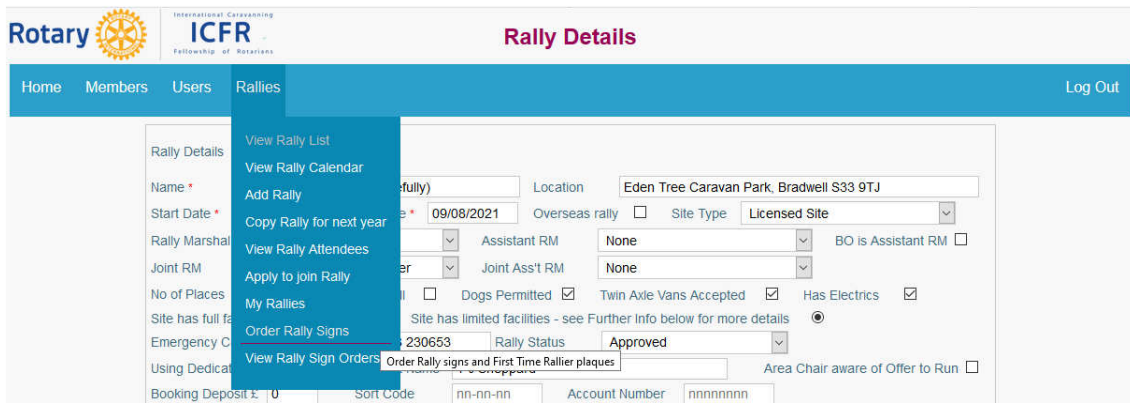
Clicking Offer to Run Rally on the Rallies menu opens the Offer to Run a Rally page which is very straight forward to complete. Once completed, click the Submit Offer to Run Rally button. This will cause the page to validate the entered details and highlight any missing elements. If the validation is successful, the rally will be recorded in the Membership system and an email sent to the Programme Secretary. The Programme Secretary will check the proposal and provided there are no issues identified, it will be circulated to the Rally Committee for approval.

Orders for Rally signs and plaques

The ordering of free Rally signs and First Time Rallier plaques also now available from within the ICFR Membership system.

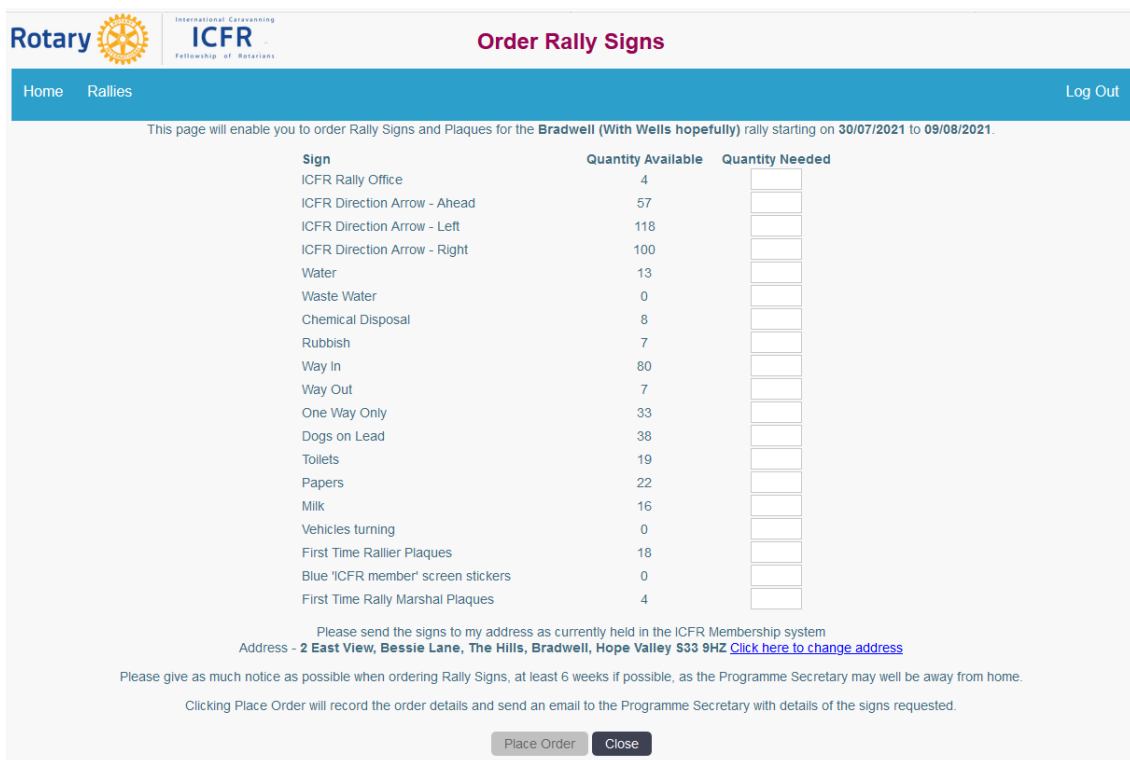
Simply click on View Rally List on the Rallies menu, then click on the View / Edit button for your rally.

When your rally is displayed, click on Order Rally Sign on the Rallies menu (NOTE: the menus are context sensitive and change depending on which page of the system you have opened).



When the Order Rally Signs page opens, this will list all the free Rally Signs available, together with approximate numbers available.

Simply enter the number of each item required, check that your delivery address is correct (taken from your current membership record) and click Place Order. This will email the Programme Secretary requesting the relevant signs.



Please make sure you place orders as early as possible in case the Programme Secretary is in far off lands, thousands of miles from the stock of signs 😊

You can check the status of any Rally Sign Order for rallies where you are the Rally Marshal or Booking Officer by clicking on View Rally Sign Order on the Rallies menu. This will display a list of your order and their current status.