USING THE RAMBLERS' BOOKING SYSTEM

NELR WALKS LEADERS' GUIDANCE NOTES

Introduction

1. These are more detailed notes than are necessary to set-up bookings for a walk or event. In your walk description, remind people to book through the NELR website (there are nearby links on the Ramblers and Inner London Area websites) and copy the Event ID number. Then log-in on the NELR website and:

   - Enter the Event ID in Basic Info;
   - Comms Tab - check your name is shown in the "Booking contact" and "Walk/Event Leader" fields for final list emails;
   - Click/tap "Submit" when you have finished everything (bottom left-hand corner).

   For the rest, walk leaders can rely on the default settings (also described as "global" on the screens) or you can change them to suit your preferences. Organisers of events with no walk should also see paragraph 28.

Registration and Login

2. When a walks leader registers on the website, the Administrator will give access to the admin side of the Booking System.

3. When a walks leader logs-in (link below "Our Next Walks") the Booking Admin Tab appears on the right-hand end of the top task bar.

Adding a Booking to a Walk - Start

4. You first need to enter your walk on Walks Manager in the usual way.

5. All walks, including draft walks, are given a Walk ID number and this also appears at the bottom of the walk description when it is published on our website. Copy the ID number.

6. On clicking or tapping "Booking Admin", you are taken to screen that will list your walks that already have booking records. To add a new booking record to a walk, click/tap "+Add" in the bottom left-hand corner of the screen. It is also possible to use the filter options to view other walks with booking records.

First Screen - Basic Info

7. You must paste your ID number into the top field – "Event Id".

8. The "Total number of places" field opens a list of numbers for you to set the limit on the number of places on the walk. If you select "0" it means that there is no limit to the number of people who can book. The default limit is 20.

9. The "Who can attend?" field is set at a default of "Non-members welcome" for walks. For other events, you may wish to change it to "Members Only".

User Access Tab

10. This screen covers registered members who are making a booking.

11. The first field is for the number of people that a registered member can book on a walk. The default is 1 and it should not be increased above 2.

12. The “Notify List” field is asking if you want a waiting list to be available, if the event is full. The default is “Yes”.

13. The “Attendee List visible to Users” field gives the option to allow registered and logged-in members to see who has already booked. The default is “Yes”.

Guest Access Tab

14. This screen covers people booking without first registering and/or logging-on.

15. The “Guest bookings are allowed” field should always be set to “Yes” for walks, but this could possibly be changed to “No” for other events.

16. The “Guest telephone number required” field is set to the default of “Not requested”. We do not generally phone people. If it is changed to “Optional” or “Mandatory” it creates an expectation that the guest will receive a phone call if there are problems and some people will be wary of giving their phone number.

17. The “Max Guest Attendees” field is set to 1 as the default. Therefore, a guest user is unable to book multiple other people on a walk and each guest has to book and provide their details.

18. The “Attendee List visible to Guests” field is set at No as the default. We do not want guests, who might be strangers, to see who else has booked on a walk.

Payments Tab

19. This screen is unlikely to be used often and the default in the “Payment Required” field is set to “No – Not required”. If it is changed to “Yes” the screen opens up and details of how to make the payment can be entered.

20. It is not possible to make payments through the booking system or any other part of our website, so it has limited use.

Comms Tab

21. Check the “Booking Contact” field and ensure that the walk leader’s or event organiser’s name is selected from the drop-down list.

22. The “Copies of booking emails” field is set to a default of “No notifications”. If it is changed the walk leader or event organiser will receive an email after each booking or cancellation.

23. The “Closing time option for bookings” allows walks leaders to set the time they want bookings to close. The default is 6pm on the day before, but there are other options

and a “Custom” option allows more flexibility to set the closing date and time.

24. The “Send booking list when closed” field is set to “NO”, so that the Administrator (Annette) does not receive the final booking list.

25. The “Walk/Event Leader – final booking list” field must be set to the name of the person leading the walk or organising the event. They will then receive an emailed list of everyone booked on the walk shortly after the event closes. If a list is not required, change it to “No”.

26. The “Emails to People who have Booked Section” covers communications to people who have booked places. The default settings are aimed at reducing emails whenever any change is made to a walk description in Walks Manager. There is an email facility in the booking section of the walk, to send an email to everyone who has booked, and that should be used to notify important changes.

27. The “email bookers when walk is amended” field is set at “Never”. There is an option to change it to “”Only if the date or time changes”, but that could still be confusing and can be covered by an email that gives more information about the change.

28. The “Include Booking email text” field gives the option to add a message to the confirmation email that is sent when someone makes a booking. The default setting is set to “Yes” and the text box should be left blank. This note will show in the email:

> “Welcome to this NELR walk. Details of what to expect, what to wear and things you should bring are on our homepage and the FAQs section of our website, which can be accessed Here.”

The setting should be changed to “No” for events that do not include walks.

Amendments on the Booking Record and Walks Manager

29. Booking records can be amended at any time. Log-in and click/tap “Booking Admin. Click/tap on the pencil icon next to the walk or event and then make the amendments. Click/tap “Submit” when you have finished.

30. To delete a booking record, click on the bin icon next to it.

31. Annette has been reminded by the Walks Manager support team that it is important to minimise changes to published walk descriptions. We will still need to make amendments when there are changes to the actual walk arrangements, but it would be helpful to reduce errors. Annette currently edits minor errors in walk descriptions, such as typos and grammar, and raises queries with walks leaders when information is unclear or missing. It would be helpful if we could all check our walk descriptions more thoroughly before we publish them - the preview option makes this easier. Maybe keep them as draft walks until all necessary information has been included and we have checked them again. Also, consider asking someone else to check the draft.

Annette Warrick
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