

Documentation: Lodestar

Recommended Default Bookmark: <http://intra.rallybus.net/Admin/GlobalSearch>

If not working, you can use the specific searches by tab as needed and shown below.

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Add/Create

Add RP to an Event

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Indicators

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[What does it mean if an event's trip link is highlighted in green?](#)

Create

Create an Event

1. On the Lodestar Home Page, <http://rally-lodestar.azurewebsites.net>, select the second tab "Events" at the top part of the page.
2. From the resulting page, select "Create new event" (#12 on the list).
3. On the resulting page, [Create page](#), for Domain, select "Rally" from the drop down menu.
4. Click "(select category)" for Category, and select from the drop down menu the category that best describes the event being created. Thus,
 - a. Amusement Park - is for events like trips to Mountain Creek Waterpark
 - b. Beach - is for trips to Wildwood Beach, etc.
 - c. Camping - is for trips to Buffalo Bills Training Camp, etc.
 - d. Casino - for trips to Foxwoods Resort Casino, Sands Resort Casino & the like
 - e. Circus - for Cirque du Soleil and Stars on Ice events
 - f. Concert - one of the most often used category, it is used for musical concerts or tours of famous singers and bands
 - g. Crab feasts - for lobster, shrimps, & crabs festivals
 - h. Festivals - mainly for musical festivals but can also be used for trade fairs
 - i. Food & drink - for food and drink events
 - j. Movie - for trips to movie theaters
 - k. Music - for other musical events other than concerts
 - l. Parade - trips mostly to sports championship parades
 - m. Rafting - for trips to whitewater rafting
 - n. Surf- for surfing events
 - o. Tour - for trips to specific places of interest
 - p. Vineyard - for trips to vineyards like Woodinville Wine Express & Long Island Vineyard Tour
 - q. Visitations - for visits to correctional facilities
 - r. College - mainly for school break trips
 - s. Convention - seminar and conferences
 - t. DC - for trips to rallies & marches held in the US capital
 - u. Go - for trips to specific cities for specific purpose
 - v. Progressive politics - usually for women's marches and the like
 - w. Weekday commute -

The SPORTS categories are self-explanatory.

FOR CONCERTS:

- Let's say we are creating an event for the musical concert of Carrie Underwood at STAPLES Center in L.A. on Sept. 12, 2019 based on the info from this source - <https://www.staplescenter.com/events/detail/carrieunderwood19>. From the drop down menu of "Performer," select the appropriate name of the singer/band, i.e., Carrie Underwood.
- For the "Performers" option, use it when there are more than one performer in the event, used specifically for music festivals & the like. While you can only select one "Performer," you can select as many as needed for "Performers."
- In the "Name" option, enter the name of the performer.
- In the "Time" option, set the date of the event/concert from the drop down calendar, dragging the buttons to set the hour and minutes. After "Time" is set, the "Start" and "End" options will be automatically set.
- Ignore the "Recurrence" button for now.
- "CP" means Congregation Point or the name of the venue of the event, in the example event, select STAPLES Center from the drop down menu. After the CP is selected, the "City" option is automatically set.
- The "Path" option determines the unique domain of the event, and it's usually automatically set, unless instructed otherwise, it can be overridden.
- The "Description" is pretty much the same as "Name" of the event.

FOR SPORTS (games between two teams)

Sample event: Chicago Bears vs Denver Broncos -

<https://www.chicagobears.com/schedule/>

- For "Category," select "Football" from the drop down menu.
- For the "League" option, select the appropriate name of the league, in this case, it's "NFL."
- For the "Home Team" option, enter the name of the team whose stadium is the venue of the game. In this case, select "Denver Broncos" from the drop down menu. Selecting the home team automatically sets the "CP" option to the name of their stadium including the "City" option.
- For the "Away Team" option, select the name of the opposing team from the drop down menu.
- The "Name" of the event is automatically set after the home & away teams are selected.
- In the "Time" option, set the date of the game from the drop down calendar, dragging the buttons to set the hour and minutes. After "Time" is set, the "Start" and "End" options will be automatically set.
- Ignore the "Recurrence" button for now.
- The "CP," "City," & "Path" are all set automatically.
- The "Description" is pretty much the same as "Name" of the event.

Add Cities to an Event

1. As an admin, you can add cities servicing an event
 - a. <https://intra.rally.co/City/Easy>
 - i. Select the CP from a dropdown
 - ii. That populates the Event dropdown
 - iii. Selecting an event shows the list of cities
 - b. You can also go to this page with a particular event ID selected
 - i. Ex: "Testa de bola"
 1. <https://intra.rally.co/City/Easy/88930>
2. On the left will be the cities that are already selected for the event
3. On the right, you can select a State from the dropdown
 - a. Selecting and then click "State Cities" to show all the Cities that we have in the Rally DB
4. Create a new City for the State selected by putting in the name on the right textbox, and clicking Create
 - a. Click "State Cities" to refresh the list with your new city
5. Add the City as an RP for this Event
 - a. Select the checkbox next to the cities you'd like to add
 - b. Click "Create Event Cities"
 - c. This will also lookup the distance between the newly added RP and the CP city and save that in the BD
 - i. This is used for cost algorithms

How To Create One Way Trips

1. Go to the Manage Trips page for the event
2. Use the dropdown to find the city you want to add a time to
3. Click the toggle link. Use the fields beneath the horizontal row of green buttons to enter the trip information.
4. For a one way trip from pick-up point (**RP**) to destination (**CP**), select the **One Way** box.
Example: One way trip from Manhattan, NY to MetLife Stadium.

For a one way return trip from CP to RP, select **both** One Way & Reverse boxes.
Example: MetLife Stadium to Manhattan, NY.

If *only* Reverse box is selected, a **round trip** will be created from CP to RP (which is extremely rare).

5. Fill up Origin Departure & Arrival boxes.
6. Click "Add New" button.

Search for an Event

Via Global Search or Events>>Search Again

Copy (or duplicate) an Event

Via Events tab, select Event Search to go to the Search Again page

1. Select one or a combination of the Filters, usually CP of the event to be copied
2. Set "Visibility" of the event to be copied, whether "Future" or "Past"
3. Set "With" option of the event to be copied as Transactions, Archived, NEI, etc.
4. Use the "Query" option for other details not in Filters, like "women's march"
5. Click on the "copy" link of the event to be copied
6. On the Copy page, make the necessary edits in the "New Value" column for the new event
7. Select appropriate button whether "Archive original..." or "Maintain original..." to save new event.

"Archive original and create new event" is usually used for events that are occurring annually, and are held at the same venue. For example: music festivals, horse derbies, even women's marches, etc. The subdomain may remain the same.

"Maintain original and create new event" is used to create a copy of the same event at the same venue, but with a different date. The subdomain should be different from the event copied from. An example is a crab feast that is held on a Saturday, with another on the next day. First event's subdomain could be crab-feast-nov14, the new event as crab-feast-nov15.

8. Use the "Copy To Multiple Events" to create a series of the same event, like weekend trips to waterparks and ski resorts. Add the expression {d} to "Name," "Description," and "Subdomain" to create a unique name, description, & subdomain for each event that will be created. Set "Start" and "End" dates of the series of events you want created. Select "Only On:" as to the desired day or days of the events. Hit the "Copy To Multiple Events" button to create the new series of events.

Archive an Event

Via Events tab, select Event Search to go to the Search Again page

1. Select “options” link of event to be archived.
2. On “Update Options” page, go down to bottom of page and set “Stage” to “Archived” and hit “Update Options” button.

Find the Event (Transaction) Summary Page

Search for an event (see [Search for an Event](#)) and click the Summary link

Find the Manage Trips page

Search for an event (see [Search for an Event](#)) and click the Trips link

Searching for transaction or user by booking number

Via Transactions tab

1. “Search specific transactions” link
2. Enter booking # as query

Via Global Search

1. Check “transaction.” box to right of search box
2. Enter booking # and hit enter

Searching for transaction or user by customer name

Via Global search

1. Check “user” and “transaction” boxes to right of search box
2. Enter just last name and ctrl+f for first name if needed (could search for both but more likely to not find results)

Searching by customer phone number

Via Global search

1. Check “user” and “transaction” box to right of search box
2. Enter phone number into search box and click enter

Find trip manifest

Via Global Search

1. Check events and search by name
2. Click into Summary
3. Click into Trip (by city name)

Find creator of private trip

Via Global Search

1. Check events and search by name
2. Click into options
3. See “created by”
4. Click member ID

Find a Trip ID

Via the Trips page

1. Click Get Trips
2. See the number on the green button on the right-hand side of the row for the trip you are interested in OR
3. For easy copy/pasting, click the list icon to reach the Trip Details page and copy the trip ID from the URL

Via the Summary page

1. Click into the trip for which you want the ID
2. See the value after “tid=” in the resulting URL

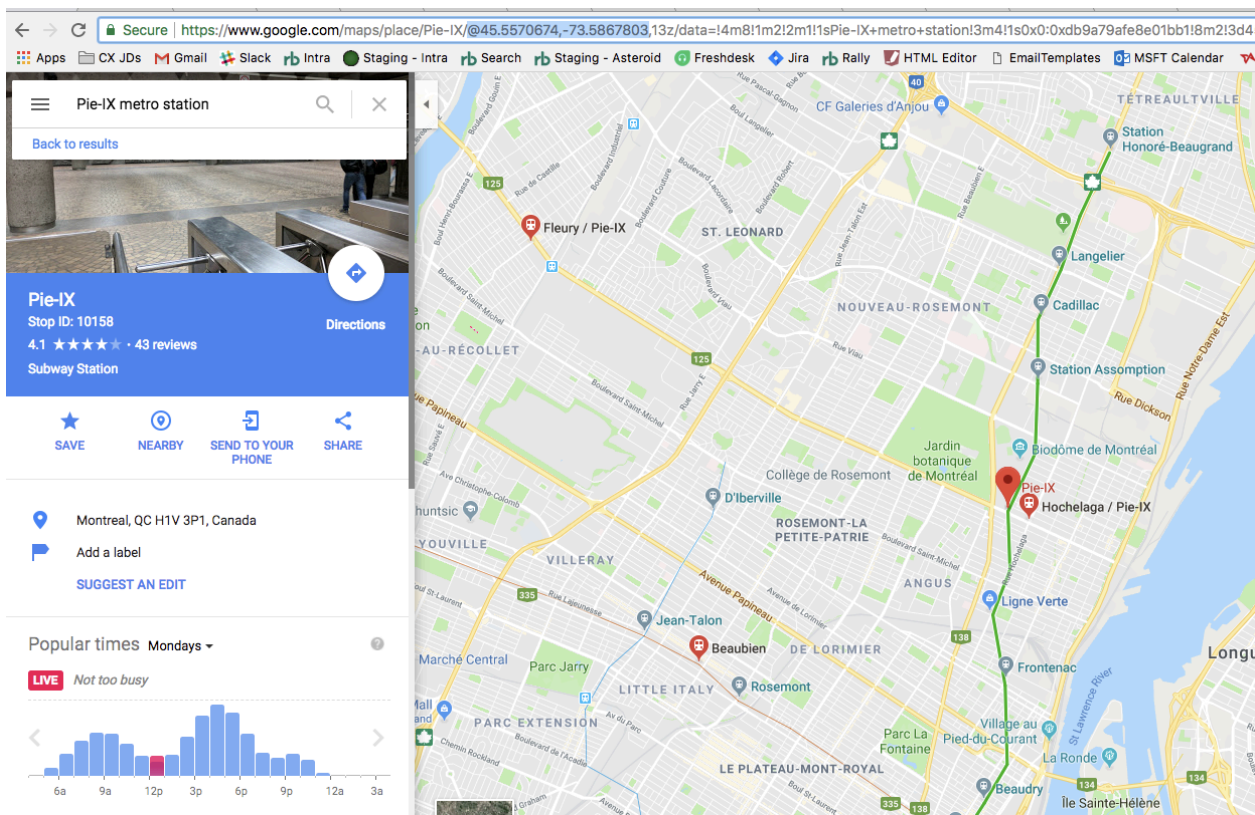
Find out if CC was charged

1. Once on the Transaction Detail page, do *not* look at the “Captured” section at the top
2. Instead, look at the Status section
3. Any status stating Captured (e.g. Captured or AuthorizedAndCaptured indicates the customer was already charged
4. Compd means we gave the ticket for free
5. ThirdPartyPaid means they booked through a partner (typically) or with a coupon code that covered the full cost of their seats
6. PaymentMethodStored means we have their CC info but haven’t even authorized it yet
7. Authorized means we’ve authorized their card (validated it’s working and put a hold for the amount we need) but we haven’t charged them yet
8. Voided means we canceled the transaction before it was charged
 - a. Should be used if the payment is Authorized or PaymentMethodStored
9. Refunded means we fully refunded
 - a. Should be used if the payment was already captured

Change pick-up / drop-off location

1. Search for the event via Global Search
2. Click the “trips” link next to the event you need
3. Search for the city (RP) for which you want to change the pick-up
4. Click the icon that looks like a sheet of paper with a list, all the way to the right (in the Details column)
5. Go to the Trip Detail page that just opened in a new tab
6. Enter the information as follows:

- Enter the address into the Origin Pickup Location Address field
- Enter the name of the location (e.g. Harris Teeter Town Plaza) in the Origin Pickup Location Notes field
- Enter the latitude of the pick-up (so it appears correctly on the event page) in the Pickup Latitude field
- Enter the longitude of the pick-up in the Pickup Longitude field
 - To get the lat/long, click into the location in Google Maps, and find this info in the address bar, as highlighted here (don't include the @ symbol). The latitude is listed first, then longitude. In this case, the longitude is negative:



- Scroll down and click the Update Trip button and wait until you see a "Success" message underneath it
- Scroll to the top and click reset cache
- Go to the public event page that just opened in a new tab, click to the RP you edited, and confirm that the new information you provided is reflected there

Change event time - for whole event

****Note:** If a rider tells us times have changed, we should always corroborate online before changing times!

1. Events tab
2. Update Event Times - <http://intra.rallybus.net/Event/UpdateTimes>

OR

1. Go to the Event - Update Options page and see the options on the right-hand side:

Start
 12/29/2018 3:00:00 PM

Event
 12/29/2018 4:00:00 PM

End
 12/29/2018 7:00:00 PM

Departure
 12/29/2018 7:45:00 PM

START: Target arrival time at CP (typically one hour before event start time for concerts and three hours before for sporting events; festival-type concerts like Dead & Co may also arrive three hours early for tailgating)

EVENT: Event start time (e.g. game time)

END: Estimated end time of event (typically 3 hours are estimated for concerts, football games, NASCAR races)

DEPARTURE: Set at 45 minutes after the end time

Once the values are changed, be sure to click the Update Options button in the bottom right-hand section of the page.

Send to Marisa for review.

Once the event times are updated, the individual trip times will also be automatically adjusted accordingly *unless they were previously overwritten* from the Manage Trips page. You can tell if trip times were overwritten if there are any non-0 values. For example, the trip time was overwritten for the second trip shown below:

| Origin Departure | Origin Offset | Travel Minutes | Arrival | Departure Offset | Departure |
|----------------------|------------------|----------------------|---|---------------------|----------------------|
| <input type="text"/> | 0 | <input type="text"/> | <input type="text"/> | 0 | <input type="text"/> |
| <input type="text"/> | 0 | <input type="text"/> | 12/09/2018 09:00 12/9/2018 10:00:00 AM <input type="button" value="reset"/> | 0 | <input type="text"/> |

Change trip time within an event

Via events tab

1. Events
2. Search Again
3. Find event
4. Click trips link
5. Click get trips link
6. Search for city (using ctrl+f or the city dropdown near the top)
7. Change in-line (if blank, it's pulling from default for event)
8. Click button with ID number to the right of where you are changing the times and wait for "success" message
9. **NOTE: The "reset event cache" button on this page will result in "Event/ResetCache" being appended to the end of the URL. Update this to *just* "/ResetCache" and click enter again to update the page.**

Via global search

1. Check "events" box to right of search
2. Enter event name into box and click enter
3. Click trips
4. Search for city
5. Change in-line (if blank, it's pulling from default for event)

Add new trip time to an event

1. Go to the Manage Trips page for the event
2. Use the dropdown to find the city you want to add a time to

City

3. Use the fields beneath the horizontal row of green buttons to enter the trip information. If the important time is Arrival, just enter that. Everything else will be inherited. If the custom aspect of the trip is the departure time, then just enter that.

| | | | | | | | | |
|--------------------------|--------------------------|------------------------------------|------------------------------------|--------------------------------------|------------------------------------|------------------------------------|------------------------------------|--|
| Get Trips | Reset City | [select city/all cities] | Copy To City | <input type="checkbox"/> Copy Addons | Default Trips | Delete All Trips | Delete Selected Trips | <input type="checkbox"/> If None |
| One Way | Reverse | Origin Departure | Origin Offset | Travel Minutes | Arrival | Departure Offset | Departure | Actions |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="button" value="Add New"/> <input type="button" value="Less than"/> |

4. Once you've entered the relevant trip info, click the "Add New" button on the right
5. Send to Marisa for review

Modify Cost at Event Level

1. Check “events” box to right of search
2. Enter event name into box and click enter
3. Click Prices
4. Modify Seat Cost (flat number, disables price increases)
5. **OR, recommended:** Modify Cost Multiplier

Modify Cost at Trip Level for Single Trip

1. Check “events” box to right of search
2. Enter event name into box and click enter
3. Click trips - <http://intra.rallybus.net/Trip/Manage/>
6. Search for city
7. Click paper/list icon
8. Modify Seat Cost (flat number, disables price increases)
9. **OR, recommended:** Modify Cost Multiplier

Modify Cost at Trip Level for Multiple Trips

1. Check “events” box to right of search
2. Enter event name into box and click enter
3. Click trips - <http://intra.rallybus.net/Trip/Manage/>
4. Select relevant trips
5. Click “Details+” button at top of Save column
6. Check box for either Seat Cost or Cost Multiplier (as above, under Single Trip, multiplier i is always recommended)
7. Enter adjustment
8. Click Update Trip

Modify RP for Specific Trip

1. Check “events” box to right of search
2. Enter event name into box and click enter
3. Click trips - <http://intra.rallybus.net/Trip/Manage/>
4. Search for city
5. Click paper/list icon
6. Enter Origin Pickup Location Address (e.g. 25 Harvard Ave) and Origin Pickup Location Notes (e.g. Tuscan Elementary School)

Modify City Default RP

1. Search for City via
 - a. Global Search, check box for Cities
 - b. Cities tab, search box at top with “Find city” button
 - c. Event search >> cities link

- d. Pickup Location Address (e.g. 25 Harvard Ave) and Pickup Location Notes (e.g. Tuscan Elementary School)

Creating CP Cities (when a CP is missing a template and its events show no trips due to no cities being associated)

1. Go to the Event and CP City Selection page (<http://intra.rallybus.net/City/Easy>), either via a specific event for which cities are missing or the via the Cities tab
2. On the left-hand side, select the radio button next to CP
3. Select a CP in the same city as the CP for which you need to create cities
4. On the right-hand side, click the CP Cities button and make sure the city list populates on the right-hand side of the screen
5. On the left-hand side, change the CP dropdown back to the CP for which you want to add cities
6. On the right-hand side, click the checkbox above the city list to select all
7. On the right-hand side, above and to the left of the city list, click the Create CP Cities button
8. On the left-hand side, click Refresh to see the full city list for the CP
9. Double-check to make sure no cities are missing as compared to the list on the right. For any cities that are missing, re-check them on the right-hand side and click Create CP Cities again. Keep doing this until the lists match.

Adding CP Cities Where Missing (when one or more events at a given CP are missing cities, but the CP itself already has a template and cities associated)

1. Go to the Event and CP City Selection page (<http://intra.rallybus.net/City/Easy>), either via a specific event for which cities are missing or the via the Cities tab
2. On the left-hand side, select the radio button next to CP
3. Select the CP that is missing cities for the current event
4. Once the list of cities populates, click the “CP to Empty Events” button on the right-hand side
5. ResetCache on the event to make sure the cities / trips populate properly on the public site

Moving Transaction Between Trip Times on Same Event

1. Go to the Transaction Detail page for the transaction you want to move
2. In the Reservations section, click on the edit icon to the left of the trip information under each reservation
3. Select the trip you want to move the reservation to
4. Be sure to do this for each of the reservations on the transaction

Moving Transaction Between Trip Cities on Same Event

1. Go to the Transaction Detail page for the transaction you want to move
2. Click the dropdown above “Update Reservations City”
3. Click “[load cities]”

4. Select the city you want to move the booking to
5. Click "Update Reservations City"

Moving Transaction Between Trips on Different Event

1. Go to Transactions>>Search for a Specific Transaction (<http://intra.rallybus.net/Transaction/Search>)
2. Search for the transaction ID of the booking you want to move via the Search Query box (or via a specific CP>>Event>>Trip if you are moving people in bulk from one trip to another)
3. Check the box next to the transaction(s) you want to move (selecting all where applicable)
4. Enter the Trip ID to which you want to move people into the "Trip ID" box in the "Re-Assign Transactions And Reservations to Trip" section (to find the trip ID, see [Find a Trip ID](#))

Setting Routes at Trip Level (may be necessary when an event has multiple trip times, in order for us to properly view bookings per trip time rather than sum bookings per city, which won't actually be at the same time or on the same route)

1. Go to the Manage Trips page for the event ([Find the Manage Trips page](#))
2. Go through in sections to update the routes at the trip level. You can do this by filtering by City Route and Time, so you can Select All from the resulting list of trips and update the route altogether. You will need to do this for each route and each date or time.

Then follow these steps (particularly if each event is on a different day):

1. Filter the City Route
2. Filter "From This Time" to the date you are filtering for
3. Filter "To This Time" to the date you are filtering for, being sure to drag the hour slider all the way to the right
4. Click "Search By Time"
5. Hit the checkbox to the left of the City column to Select All
6. Click the Details+ button on the right-hand side
7. Select a new route with the same color but different number from the route you are changing from and also different from the routes you are using on other days
8. Click Update Trips (wait for the success message in the box before closing)
9. Change the times in the upper right to update the rest of the days for that City Route
10. Once all of the routes are updated at the trip level for each day on the first route, go through the process again for any other routes. Make sure you do not re-use the same color+number combination on different days, and keep all routes the same color as the city-level route.

Manage Trips

CP:

Event: City:

City Route: Trip Route: Stage:

From This Time: To This Time: Search By Time

Get Trips Reset City [select city/all cities] Copy To City Copy Addons Delete Default Trips Delete All Trips Delete Selected Trips If None Reset Event Cache Copy selected trips to all event weekdays

| One Way | Reverse | Origin Departure | Origin Offset | Travel Minutes | Arrival | Departure Offset | Departure | Actions |
|--------------------------|--------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | Add New Create Trip for All Cities Schedule Daily Trips Un-Finalize Trips |

Multiple Trips: Start Date: End Date: On: ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☐ Fri ☐ Sat ☐ Sun [Create Multi Trips](#) [Calc Times](#) ☐ All Stg 15 Pad Mins [Email Ops](#)

Manage Trips

CP:

Event: City:

City Route: Trip Route: Stage:

From This Time: To This Time: Search By Time

Get Trips Reset City [select city/all cities] Copy To City Copy Addons Delete Default Trips Delete All Trips Delete Selected Trips If None Reset Event Cache Copy selected trips to all event weekdays

| One Way | Reverse | Origin Departure | Origin Offset | Travel Minutes | Arrival | Departure Offset | Departure | Actions |
|--------------------------|--------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | <input type="text" value="reset"/> | Add New Create Trip for All Cities Schedule Daily Trips Un-Finalize Trips |

Multiple Trips: Start Date: End Date: On: ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☐ Fri ☐ Sat ☐ Sun [Create Multi Trips](#) [Calc Times](#) ☐ All Stg 15 Pad Mins [Email Ops](#)

Changing User ID Associated With Booking (New User ID Already Exists)

Context: When a rider books with PayPal, their booking is associated with their PayPal email address. However, this address may be different from their Rally account email (as many people associate a non-primary email with PayPal). When this happens, and they want to transfer their booking to their Rally account email, we need to:

1. Do a Global Search for User against the email address associated with their Rally account:

Global Search

Query: [Search](#) ☐ All ☐ Events ☐ Transactions ☒ Users

Users

| | | | | |
|------------------------|----------------|--------------------------|------------|-------------------------------|
| 164614 | Hailey Sellers | Hailey.sellers@gmail.com | 3259983768 | User Feedback |
|------------------------|----------------|--------------------------|------------|-------------------------------|

2. Go to the transaction associated with their PayPal email
3. If you see a Create User button, click it
4. Once you've done that (or immediately if a User ID was already associated), then click the pen/paper icon to edit the user ID
5. Copy/paste the User ID associated with the Rally account email
6. Click outside the field and wait for the Working... message to complete

7. The booking is now associated with the correct email in our system

NOTE: If the User ID for the correct email does not exist, then a CX associate should escalate via a note in FD.

Changing Email on Customer Account, Not Just Booking (such that not only will all emails go to the right address, but the user will actually be able to log into their account on our site with their preferred/correct email address and see their booking)

1. Go to the old user ID, grab the phone number and copy it into your notepad
2. Delete the phone number on the old user ID
3. Go to Trip Details page of the event the customer is booked for
4. Created a comped transaction for that customer in the email they want to be associated with their account (new email)
 - a. Enter new email address, full name, and phone number.
 - b. Change the status to Error so that the booking does not count against the seats on the bus
5. Click through to that transaction once it's created via the link in the success message
6. Copy the user ID
7. Go to the Transaction Detail page for the booking associated with the wrong account on our site
8. Replace the user ID with the one you pasted from the new transaction
9. Update the email on the booking with the new email address

Remove seats for partial refund (transaction has already been captured)

1. See above for searching for a transaction by booking number, user name, or phone number
2. Click into the Transaction Detail page
3. Under Reservations, check the box next to each seat you want to remove
4. Click the Refund button underneath

Remove seats on a transaction that has not yet been charged

1. See above for searching for a transaction by booking number, user name, or phone number
2. Click into the Transaction Detail page
3. Under Reservations, check the box next to each seat you want to remove
4. Click the Remove button underneath
5. Change the Amount in the upper left-hand corner according to what we ultimately need to charge the customer (the removal does not currently update that number)

Partial refund irrespective of seat count (e.g. moving to a less expensive RP)

1. Enter the amount you want to refund in the Partial Refund

Changing Status on Transaction

1. See above for searching for a transaction by booking number, user name, or phone number
2. Click into the Transaction Detail page
3. On the right or at the bottom (depending on your screen), find the Actions section
4. See the dropdown above "Update Status"
5. Select relevant status
 - a. If rider is canceling and it's greater than 7 days before their event,
 - i. Move to PendingRefund if their transaction Status is Captured or AuthorizedAndCaptured
 - ii. Move to PendingVoid if their transaction has not yet been captured (e.g. is Authorized)
6. Click "Update Status" and wait for page to refresh (you'll see the Working... message in the upper left)

Change City Order on Route for Event

1. Go to Cities for the event
2. Click into EditEC for the cities you want to change the order of
3. Modify the Route Override Pickup Order field
 - a. First (farthest) pick-up should be numbered 1, second is 2, etc

Add RP to An Event

- Navigate to Cities page for the event
- Select the desired RP's state from the dropdown at the top of the right-hand side of the page
- Find the city in the list
- Check the box next to it
- Click "Create Event Cities"
- Look for the mileage just to the left and under the "no route" dropdown -- once that appears, the city has been added

If the city does not appear in the state's list:

- Enter the city name in the box to the right of "Border States' Cities"
- Click Create
- Then continue with the steps above to find the new city in the state's city list

Create a coupon code for a specific rider (via the transaction detail page)

Generate Coupon text

- 1) Find the **Generate Coupon** section on the right hand side (or very bottom, depending on your screen size) of the specific rider's transaction detail page.
- 2) For '**Manual Code**', we typically combine first initial, last name, and booking #.
(e.g. The code for rider John Smith with booking #555555 would be **jsmith555555**)
- 3) There are 2 types of coupon codes we can issue (whichever type you are issuing, leave the other type empty):
 - a) For **free seats**, set the '**Discount Rate (%)**' to **100** (no "%" needed) << This is the most common type of coupon code we issue.
 - b) To issue a coupon for a specific amount, enter the specific dollar amount in the '**Discount Amount (\$)**' box.
- 4) *The next two fields are pretty critical to avoid abuse.* The field where there is a **1** is for '**Redeemable Quantity**', and that's almost always 1, so you can leave it.
- 5) '**Reservation Limit**' refers to # of seats:
 - a) If issuing **free seats**, enter # of seats you are granting.
 - b) If issuing a \$ amount, leave this field blank.
- 6) The last field is the expiration date which is automatically set to 1 year out and there's no need to change it.

Note: The rider will automatically be sent an email with the coupon code at the time that you create it.

Approve userRequested Rally Point / Trip

1. Events
2. Search again
3. Search for event
4. Click Summary

5. Arrive at Transaction Summary page: <http://intra.rallybus.net/Transaction/Summary/> - this is really the Event Summary page and includes a list of trips once you search for the event. You can update the stage in-line.

Send email to all riders on trip

Via Global Search

1. Check events box and enter event name in search box
2. Click Summary for the event in the results
3. Select the trips you want to email
4. Click "Send Emails for Selected" button
5. Select the email you want to send
6. If sending a Blank email, be sure to enter a subject line and body text. The body text needs to include html tags for any formatting.

Send email to specific rider

Via their transaction page (see above for how to search)

Review and Approve Pending Emails

1. Communications tab
2. Manage Messaging: <http://intra.rallybus.net/Email/Search>

Add generic text to emails pending in queue

1. Go to [Communications>>Manage Messaging](#)
2. Filter for the CP of the event you are messaging to
3. Filter for the Event you are messaging to
4. Filter for the city if these notifications are only going to a specific trip
5. Click Refresh once all of your filters are set
6. Scan the list to confirm it's properly filtered
7. Click the "text" box above the list
8. Enter your html-formatted generic text
9. Click the select all checkbox at the top left of the list
10. Click "Send Background"

Approve Event Suggestions (flow with Sylvia)

1. Events
2. Event Suggestions: <http://intra.rallybus.net/Event/EventSuggestions>

Approve Bus Captains

1. Events
2. Captain Approvals: <http://intra.rallybus.net/User/CaptainApprovals>

What does it mean if an event's trip link is highlighted in yellow?

Automation has run for at least one trip on the event to update the times based on routing.

What does it mean if an event's trip link is highlighted in green?

All times are finalized and the event is ready to go.

Create/Edit/Delete Addons

Create Addon

1. Click on the "Events" tab at the top of the Rally page, <http://intra.rallybus.net/Event>, and click "Manage Addons"
2. Select CP and name of the event from the corresponding dropdown menu
3. Type in the Name of the addon, eg., "Tailgate Pass"
4. Type in the Description of the addon, eg., "This upgrade is required if you want to tailgate in the bus lot."
5. In the Cost space, enter the price of the addon
6. Click the Create button. Result will be reflected on the bottom part of the page.

[Reset CP Cache](#) [Reset Event Cache](#) [Refresh List](#)

CP

No addons

Event

| ID | Name | Description | Price | CP | Domain | Event | Trip | Primary Asset | Secondary Asset | Edit |
|------|---------------|--|-------|----|--------|--------------|------|---------------|-----------------|----------------------|
| 1199 | Tailgate Pass | This upgrade is required if you want to tailgate in the bus lot. Click for more details. | 20.00 | | | Jets @ Bills | | Primary Asset | Secondary Asset | Edit |

Event Cities

No addons

Trips

No addons

Edit Addon

1. On the "Manage Addons" page, select CP & name of event
2. Scroll down to the bottom of page and click on "Edit" of the addon to be edited

Remove Addon

1. On the "Search Again" page, click on "addons" of the event
2. Select by ticking the box on the left of the addon, then click on the "Delete Selected AddOns" button

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STILL IN PROGRESS:

5.

[Modify event description](#)

[Add to event description](#)

How to decide between adding an RP to a public trip or creating your own trip?

If I want to make my event searchable on rallybus.net, should I just let you create a public event?