

Race Support Contract Management Requirements

Goals:

Primary: Reduce the volunteer labor associated with managing our race support business.

- a) generate and track contracts with our race support clients. Reduce the processing related to signing contracts for both FSRC volunteer and race director. (Priority 1)
- b) Make it easier to manage the data associated with our race support business with less manual manipulation of spreadsheets. (Priority 2)
- c) Provide an availability calendar to aid race directors in selecting race dates. (Priority 2)
- d) Automate status emails to race directors (Priority 2)

Background

The current method of tracking race support business involves maintenance of a Google Sheet (tab per year, row per weekend date). The columns track all of the information required to generate the contract, along with additional information for tracking when the invoice and contract are sent, and when the payment and signed contract are received. When the treasurer fills in all the fields required to go to contract, a volunteer downloads the sheet and generates a Word file via mailmerge (saved as pdf). The treasurer emails the contract to the client race director. The race director must sign the contract and either scan/email or return via US Mail.

Requirements

Priority One Requirements

- [Contract 1]:The tool shall generate a Google Doc document based on the information in the Google Sheet for a given race (see current contract Word file contract for details) upon request by administrator
- [Contract 2]: The tool shall generate a link that can be emailed to the client race director upon request by administrator
- [Contract 3]:The link shall bring up a web page that provides:
 - view/download of pdf contract
 - Capability for the client race director to sign/date the terms of the contract
 - Email confirmation of the signature to client race director and racervices@steepchases.org. The email shall include a link to view/download the pdf contract.
- [Contract 4]:The tool shall update the Google Sheet with the current contract status of the race (contract sent, contract signed).

Secondary Requirements

- [Data 1]:The tool shall provide the ability to duplicate the spreadsheet entry(s) for race(s) for a new date (either entered manually or generated automatically for the same day in the subsequent year).
- [Data 2]:The tool shall provide a form-based admin interface for data entry.
- [Calendar 3]:Based on status (open, tentative, booked), the tool shall generate a viewable calendar that can be used by clients to choose available dates. Viewable details from this calendar TBD, but no race details should be publicly viewable for tentative races.
 - note only certain services should be used to cause date to be shown as blocked. E.g., if only premium-promotion, date should not be shown as blocked
- [Email 1]: Send confirmation email to the race director (copying the FSRC race support team lead) approximately 5 days before the race (Monday for a Saturday/Sunday race) , with the contact information for the FSRC race support team lead.

- [Email 2]: Send an email to the race director within two days after the race, reminding them to send results to results@steeplechasers.org. Include link to template. Possibly distinguish between grand prix results (mandatory) and other (optional). Include wording "if you have not already done so", in case the results were sent before the email goes out.
- [Email 3]: Consider a short survey to gauge quality of our service.