Convention Manager Admin Guide

Web Application Developed by Westlinks Online

October 3, 2023

Contents

Abstract

This document defines the application and provides details on usage and operations.

Chapter 1

Introduction

Convention Manager is a cloud based Software As A Service (Saas) web application which provides customers with a platform to operate a convention. It is built specifically to manage 12 step conventions, but it is possible to adapt it to other events with certain modifications.

The platform runs on a cloud based web server and is usable on any modern web browser including mobile.

The platform is developed and maintained by Westlinks Online, LLC (www.westlinks.com), a technology company focused on infrastructure management, DevOps and web application development.

1.1 Convention Operations

The convention is comprised of many components as described below.

1.1.1 Supporting Services

There are several services which work together to make the convention happen as descibed below.

1.1.1.1 Hosting

The convention website is hosted on Westlinks Online's Convention Manager platform and is located at `https://YOUR_DOMAIN.org`. Full details of Convention Manager are described in Chapter 3.

Login:
`https://DOMAIN.org/login`

The admin section is found in the top right corner under your name when logged in.

See below for details of how to administer the website. It is also strongly suggested to have at least one training session with the developer, Westlinks Online.

Functions provided by Convention Manager

- Pre-Registrations
- Onsite-Registrations
- Meals
  - Al-Anon Luncheon
  - Saturday Night Banquet
  - Spirtual Breakfast
- Convention Events
  - Speaker Meetings
  - Marathon Meetings
  - Business Meetings
  - Entertainment
- Commemoratives
- Fundraising
- Sporting Events

Users who purchase registrations, meals or commemoratives are granted login access to the website which provides them with a personalized experience including:

- Personalized schedules
- SMS Text notifications of upcoming events
- Purchase receipts

Admin functions include:

- CMS functions to manage page content
- Product management for registration/commemoratives page
- User management
- Meals management including
  - Room setup
  - Plating
- Ticketing
- Badging
- Onsite Badging
- Reporting

1.1.1.2 Westlinks Online

Westlinks Online is your service provider and the developer of Convention Manager. They maintain and host DOMAIN.org website and many of the supporting services described here.

Login:
`https://www.westlinks.com/login`

Westlinks is where you will can manage:

- Invoices
- Payment methods
- Freelancer tasks
- Domain name
- Prepaid Third Party Services
- SSL Certificates
- Phone Number
- Backups

1.1.1.3 Mailchimp

Mass email communications are managed through third party providers such as Mailchimp. Westlinks does not manage this at this time.

Login:
`https://login.mailchimp.com/`

1.1.1.4 Google Workspace

Managed by Westlinks Online, Google Workspace hosts email and distribution groups. Distribution groups are pseudo email addresses to which one or more users are members. Each member receives a copy of incoming messages. One key advantage of using distribution groups is to allow easy rotation of service positions without the need to re-make email addresses.

The account is set up with a single user / single mailbox. This is because it is a commecial account which has per-user/per-month pricing. It is possible to re-configure the account as a Google Workspace Nonprofit account which would allow unlimited mailboxes. Because of the single user/single mailbox setup, historically, Westlinks manages the account and DOMAIN users have not had a need to login. Despite that, for documentation purposes, these are the relevant links.

Login: `https://accounts.google.com/signin/`

Location (after logging in):
`https://admin.google.com/`

1.2 Website Administration

The entire functionality of the platform is managed through the admin section.

Chapter 2

Admin Dashboard

This is the top level admin page consisting of several cards providing a birds eye view of your convention statistics. Most of the items shown are selectable by admins. See below for the procedure.

The first card is a simple list of tracked items followed by user statistics.

- Items Sold (by category)
- All users
- Verified users

This card is followed by these cards:

- Marathon Meeting statistics
- Other Commitments
- Gross Revenue

On the right side of the admin dashboard is a series of user-defined cards. Follow this simple procedure to add/remove cards.

2.0.1 How to Add/remove cards for the admin dashboard

1. Edit Category
2. Select "Track sales of this item on Admin Dashboard?"
3. Enter Goal amount.
4. Submit

Chapter 3

Announcements

It is possible to publish announcements to users. There are two types of announcements. A Public Announcement is visible to all authenticated users. A User Specific Announcement is only visible to a single user.

3.1 Public Announcements

Visible to all authenticated users on the Dashboard page. The announcement is displayed in a thin red strip with yellow fonts.

3.1.1 How to Add/Remove a Public Announcement

1. Go to Admin > Announcements > Public
2. Click the CREATE button
3. Type in the announcment
4. Select "Is Active"
5. Click SAVE

HINT: If there is a previously written inactive announcment which will not be used again, you can simply edit it and select Active to recycle it.

3.2 User Specific Announcements

Visible to just a single (specific) user. The announcement is also shown in a thin red strip with yellow fonts. If there is an active public announcement, the user announcment will be placed dirrectly below it.

3.2.1 How to Add/Remove a User Specific Announcement

1. Go to Admin > Users > All Users
2. Locate the user to which you want to add the announcment
3. Click their name to load the user detail view
4. Scroll down to User announcments
5. Click the CREATE button
6. Type in the announcment
7. Click SAVE

When the user sees their announcement, they will see a [confirm] link. Clicking confirm clears the announcment from their dashboard. It also provides feedback to the administrators informing them that the user has seen the announcment.

Chapter 4

Badging and Ticket Management

4.1 Badging Dashboard

Top level page with links to all related functions.

4.2 Tabling

This utility is used to arrange meal plates at tables within each room where meals will be served. You must assign a table count and a global plate count which assigns that number of plates to each table. Note that it is possible to alter the plate limit on a table on an individual level when necessary.

4.2.1 Tabling Procedure

There is a hierarchy as follows:

Meal > Room > Tables

A meal is an record in the Events table and is tied to a sellable Product in the Products table (and belong to a category). For example, the Banquet Category contains two meal types, Regular and Vegetarian. The meal types are products which are sold on the Registration page. Each of these products belong to the Event "Banquet". This allows the Banquet to have all the meal types included for tabling.

A Room is where the meal is held. It contains tables and each table will contain a set number of plates. The Event record contains values for the room's table count and the default plate count per table.

Once you have configured the room, you are ready to assign attendees purchased meals (aka plates) to the tables. An attendee has purchased one or many meals and may have their plates assigned to one or many tables depending on how many they purchased and per any special seating requests by the attendee.

4.2.1.1 How to create a room

1. Navigate to Badging/Ticketing Management > Tabling
2. Click the name of the meal to which you will be working (e.g. Luncheon Event Details)
3. Review the meal details, paying particular attention to Table count and Default plate count
4. If all looks good, then click on the blue CREATE ROOM button. This will return all the tables with the global plate count assigned to each table.
5. Scroll to the bottom and click the blue SAVE button
6. You now have a new room, ready to assign plates

4.2.1.2 How to assign plates to tables once the room has been created

1. Navigate to Badging/Ticketing Management > Tabling
2. Click the name of the meal to which you will be working (e.g. Luncheon Event Details)
3. Review the meal details, paying particular attention to Table count and Default plate count
4. Click the green TABLE STRUCTURE button
5. Locate the table to which you want to add plates
6. Click the blue VIEW button to see the table view.
   - Here you may click the EDIT button to change the plate count for this table if desired
   - You can also change the name of the table and add a description
7. Click the blue ASSIGN button on first available table (do not skip tables)
8. From the Users dropdown list, select the name of the person you want to assign
   - Note the number next to their name. This is the available plates for that user
9. From the Plate Count dropdown, select the number of plates to assign to the user
   - Do not select a number higher than the available plates for that user
10. Click the blue SAVE button
11. Review the assignments just made
12. When satisfied, click the Dining Table Structure Detail link in the breadcrumbs menu to return to the room level view
13. Repeat steps 5-12 until all attendees plates have been assigned to tables.

4.3 Ticketing Reports

This is a link to the regular reporting dashboard, added for convenience purposes.

Chapter 5

Content Management (CMS)

All dynamic content is managed in this section. Dynamic content consists of pages and various defined blocks throughout the website. Although you can find all content in the admin CMS section, most of the locations where this content is used have edit links on their front end views to make it easy to edit without the need to hunt for it in the admin section.

5.1 Menus

These are the menu titles visible at the top of all pages. Select the "Include on Top Mene" checkbox to allow it to show. The order of the titles is based on sort order field.

Top level titles, called Parents are managed by identifying the "Is parent" flag.

Child titles are identified by selecting Is parent = no and selecting the parent from the dropdown list.

5.2 Pages

Used to store content for web pages throughout the website. Key sectons to note are

- Title - Appears at the top of the page in large, bold font.
- Menu Title - If Menu is selected, this is the text shown in the menu.
- Subtitle - Not used at this time
- Intro - Not used at this time
- Abstract - Not used at this time
- Slug - This is the URL string. Must be unique, all lower case, and no spaces. You can use hyphens in place of spaces.
- Image - Paste the path to an image which will appear in the first paragraph. Note that this is a beta feature and not currently in use on DOMAIN.org at this time.

- Published - select to make visible, uncheck to turn off. If unchecked, the record remains in the database but does not appear on the website.
- Include on Top Menu - Select if you want the title to appear in the navigation menu
- Sort - Use to adjust the position of the page
- Parent - Used when Include on Top Menu is selected. Indicates the hierarchical position in the menu

5.3 Media Library

Used to store and maintain images and other digital media files. The uploaded files are stored on Amazon S3 and are given a unique hashed filename to prevent errors caused by improper names (e.g. spaces, illegal characters etc). After a file has been uploaded you are able to see the new filename where you can copy/pasted it where needed.

Chapter 6

Events

6.1 All Events

Content

6.2 Al-Anon Events

Content

6.3 Event Roles

Content

6.4 Meals

Content

6.5 Marathon Meetings

Content

6.6 Speaker Meetings

Content

6.7 Virtual Meetings

Any meeting can be configured as a Virtual meeting. A virtual meeting can be either solely virtual or hybrid.

1. Edit existing Event to which you wish to make virtual
2. Select "Is Virtual"
3. Select "Hybrid" if the event will be virtual AND in-person simultaneously
4. Enter the "Lead Time". This is the number of minutes prior to the start of the meeting when the link will appear on the website..
5. Enter the "Virtual URL". This is the URL for the meeting.
6. Enter the "Access Code". This is the code to manually enter into the videoconferencing application.
7. Select "Public". If checked, there is no password required. If unchecked, you must enter the password in the next field.
8. Enter the Virtual Password. Users must enter this password in order to enter the virtual meeting.

Chapter 7

Groups / Area Meetings

A listing of groups and meetings from the local Intergroup used in some cases for hosting marathon meetings. The list is updated each year. It is editable and allows additional records to be added.

Chapter 8

Sales

The convention manager includes an extensive ecommerce section where attendees can purchase registrations, donation, meals, sporting events and commemorative merchandise. Each sale creates a new order and a transaction, once paid. The sequence of events is as follows:

1. Browse the registration page which includes the registration plus all products
   (a) Users use the increment/decrement icons to add/remove items from their shopping cart
2. Review shopping cart.
   (a) Click Edit to return to the registration page where they can make adjustments
3. Process payment
   (a) Purchase is processed through Stripe
   (b) Transaction number is created by Stripe and fetched by our system
   (c) System creates a new transaction record in our database using the Stripe transaction number
4. View receipt
   (a) A copy is also emailed to them.

During this process the system evaluates whether the customer is an existing user by email address. If there is no match, a new user is created. If there is a match, this order is added to their existing account.

8.1 Orders

Orders are created at the beginning of user shopping process. Each order record has a status_id field which is 0 by default. We update the value of status_id to 1 upon a successful transaction. This allows us to see all orders, including abandoned carts.

8.2 Transactions

A transaction is automatically created upon successful purchase. It means that the users credit card was authorized and payment accepted. For credit card purchases, we submit the payment intent to Stripe who authorzes, processes the payment and generates a transaction number. We get that transaction number during the payment submission and create a transaction record in our database which includes the Stripe transaction number and other pertinent information for reporting purposes. For cash purchases, including checks, a manual transaction record is created and identified accordingly.

8.3 Attendees Orders (Badges)

For orders with event registrations, the name(s) of the registrants and their meeting/group name are recorded in the aattendees_orders table, a one to many relationship. This info is used in reports and when printing the badges.

Chapter 9

Credit Card Processing

The majority of sales are collected from customers via credit cards. Credit card transactions are managed through the third party processor, Stripe. This applies to website sales and in-person, on-site sales during the event.

9.1 Stripe

Credit card transactions are managed through Stripe. Transactions are approved, processed and deposited into the bank.

Login:
`https://dashboard.stripe.com/login`

Functions available with Stripe:

- View/manage individual transactions
- Create products
- Create payment links (useful for fundraising and collecting failed website transactions)

Chapter 10

Point of Sale Operations

This procedure describes the roles and functions for volunteers who process on-site registrations and merchandise sales during the festival. There are two tables set up.

1. Registrations
2. Merchandise

Each table will have an iPad and Stripe card reader to process credit card transactions.

10.1 Required Hardware

Stripe has several card readers available.

- Stripe Reader M2
  - Requires a mobile device to process transactions such as a mobile phone or pad
- BBPOS WisePOS E
- Stripe Reader s700

Westlinks Online will assist in configuring the readers and iPads upon request. The devices will be set up and provided via FedEx prior to the convention.

10.2 Future Development

As of this writing, we use a third party application by "Collect for Stripe" to manage transactions. In time, Westlinks will write custom code to allow better functionality including access to the convention database.

10.3 Point of Sale Transactions

Using Stripe Readers

10.3.1 Get the "Collect" App and Sign In

1. Install Collect app on your iPhone or Android smartphone.
   (a) Go here: https://collectforstripe.com/
2. Launch the app
3. Sign in using the Collect Account Sign-In (not Connect with Stripe)
4. You are now ready to process purchases

10.3.2 Processing sales

For sales of items with pre-set prices

1. On the main screen make sure to start with $0.00
   (a) If you need to clear, tap on Number Pad and then tap Clear until all $0.00's appear
2. Tap on Inventory Mode
3. For each item being sold, select the quantity being sold from item in the Inventory list
4. Verify that the sale amount is incrementing correctly
5. Tap Continue
6. When prompted, ask the attendee to either tap or insert their card

10.3.2.1 For sales of items without pre-set prices

This is very similar to the above items. The main difference is you will be entering the sale price manually along with a description.

1. On the main screen make sure to start with $0.00
   (a) If you need to clear, tap on Number Pad and then tap Clear until all $0.00's appear
2. Tap on Number Pad
3. Enter the amount of the sale
4. Type in a description
5. Tap Continue
6. When prompted, ask the attendee to either tap or insert their card

10.4 Connecting to a Reader

1. The first time you use the app you will see a prompt: "Connect Reader". The next sequence of steps will be similar but not exactly to to this:
   (a) Which type of reader?
      i. Bluetooth (this is the small white reader located at commemoratives)
      ii. Internet (this is the larger black reader located at the Registration desk)
   (b) Tap on the appropriate reader
   (c) Discovering
   (d) System automatically selects the reader you chose
   (e) Tap Continue
   (f) Connecting
   (g) You may see some details about the reader
   (h) Tap through until you get to main screen again

10.5 To change readers

1. Tap on currently connected reader
2. Disconnect
3. Repeat the above steps

Chapter 11

Locations

Content

11.1 Locations

Content

11.2 The Zoom Location

Content

Chapter 12

Products

12.1 E-Commerce

E-Commerce sales are based on Categories and Products. A Category can hae one or more associated products. Ultimately products are what is sold to customers. Categories are used to group products together, such as multiple Tee Shirt sizes belonging to a Tee Shirt style (e.g. Men's Crew Neck Tee).

Example:

- Category: Womens Racerback Tank
  Associated Products
  - Small
  - Medium
  - Large
  - X-Large
  - 2X-Large

Categories can be enabled and disabled toggling the "Published" field.

1. Locate the category to toggle
2. Click Edit
3. Check/uncheck "Published"
4. Save

Products can be manipulated in three different ways.

1. Enable/disable with Published field (does not show in product listing)
2. Make available based on quantity on hand (Shows "Sold Out" in product listing)

3. Make sellable/unsellable (shows as "Not Currently Available" in product listing)

To make these changes

1. Locate the product you wish to edit (hint: find the product at the bottom of a category page)
2. Click Edit
3. Check/uncheck "publish", "Sellable"
4. Reduce quantity to 0 if you wish to show as "Sold Out" or a larger value to make it available

Chapter 13

Reports

13.1 Reporting Dashboard

Content

13.1.1 Sales

- All Orders
- Transactions
- Order Batch Generator
- Registration Report (view)
- Registration Report (CSV)
- Exception Report (view)
- Exception Report (CSV)

13.1.2 Products Sold

- Donations
- Meals
- Merchandise
- Clothing
- Product Purchases (CSV)
- Commemoratives

13.1.3 Service Commitments

- Greeters
- Hospitality
- Marathon Leaders
- Security
- Speakers

13.1.4 Sporting Events

- Golf Teams
- 10K Walk / Run

Chapter 14

Security

Chapter 15

Support

Support includes both supporting attendees by the convention committee as well as getting support from Westlinks with regards to operating this platform.

15.1 Support Dashboard

Top level page providing access to the various support features.

15.2 Contact Us Messages

15.3 Voicemails

15.4 Voicemail Greeting

15.5 Zendesk (optional)

Managed by Westlinks Online, the support desk is manged via the Zendesk platform. Email sent to support@DOMAIN.org and submissions of the Contact Us form on DOMAIN.org website generate Zendesk tickets which are processed by support staff.

Because it is a per-user/per month pricing model, during the off-season, the accunt is reduced to one user. During the 3 months leading up to the convention, we increase to 3 users.

Login:
`https://www.zendesk.com/login/`

15.5.1 Zendesk Tickets

15.6 Westlinks Support

This platform is built and managed by Westlinks Online who will provide assistance with any issues that come up with the general operations of the platform. Westlinks is available by several methods including email, chat (Slack, Telegram, Discord, SMS), Zoom and phone.

15.6.1 Westlinks Support Tickets

For normal routine issues, fill out the form found in Admin under Westlinks Support or send an email to support@westlinks.com to generate a support ticket. Either one of those methods will generate a Zendesk ticket to which Westlinks will respond within a short time and reach out if they need further information.

15.6.2 Urgent Issues

For emergency/urgent issues, if there is no response via one of the chat channels, call by phone to 929-325-1800.

Chapter 16

Users

16.1 All Users

16.2 User Roles

- su
- admin
- attendee
- guest
- marathon
- security
- onsite

16.2.1 Role Change Requests

All users of the website have a role. Roles provide various levels of access as defined below.

Chapter 17

Change Management

All code changes are managed with git. Changes are written and pushed to the git server, then pulled to the development server where testing is conducted. After testing, the changes are merged into the main branch and then pushed to the nodes via rsync. The nodes are independent from git.

We maintain 2 branches with occational temporary branches from time to time.

- dev
  - This is where the majority of new work is located. Occasionally a temporary sub branch is created for special projects, bug fixes or tests.
- main
  - This is the production branch used only for code deemed ready to be pused to the nodes.

17.1 Change Logs

Major changes are written to the change log and published for examination by our clients whenever possible. These logs are located in the admin section under Change Management.