

Convention Manager

Web Application Developed by Westlinks Online

March 13, 2023

Contents

1 Overview	1
2 Convention Operations	2
2.1 Supporting Services	2
2.1.1 SFVAAC	2
2.1.2 Westlinks Online	3
2.1.3 Stripe	4
2.1.4 Zendesk	4
2.1.5 Mailchimp	4
2.1.6 Google Workspace	5
3 Website Administration	6
3.1 Admin Dashboard	6
3.1.0.1 How to Add/remove cards for the admin dashboard	6
3.2 Announcements	7
3.2.1 Public	7
3.2.1.1 How to Add/Remove a Public Announcement	7
3.2.2 User Specific	7
3.2.2.1 How to Add/Remove a User Specific Announcement	7
3.3 Content Management (CMS)	8
3.3.1 Menus	8
3.3.2 Pages	8
3.3.3 Media Library	8

3.4	Events	8
3.4.1	All Events	8
3.4.2	Al-Anon Events	8
3.4.3	Event Roles	8
3.4.4	Meals	8
3.4.5	Marathon Meetings	9
3.4.6	Speaker Meetings	9
3.4.7	Virtual Meetings	9
3.5	Locations	9
3.5.1	Locations	9
3.5.2	The Zoom Location	9
3.6	E-Commerce	10
3.6.1	Products	10
3.7	Reporting Dashboard	11
3.7.1	Sales	11
3.7.2	Products Sold	11
3.7.3	Service Commitments	11
3.7.4	Sporting Events	11
3.8	Settings	12
3.8.1	Settings	12
3.9	Support	12
3.9.1	Settings	12
3.9.2	Website Manual	12
3.9.3	Zendesk Tickets	12
3.9.4	Voicemails	12
3.9.5	Voicemail Greeting	12
3.9.6	Westlinks Support	12
3.10	Users	13
3.10.1	User Roles	13

Abstract

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

Chapter 1

Overview

Defininitions:

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 web server and is used via any modern web browser.

Westlinks Online (www.westlinks.com) is a technology company focused on infrastructure management and web application development.

Chapter 2

Convention Operations

The convention is comprised of many components as described below.

2.1 Supporting Services

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

2.1.1 SFVAAC

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

Login:

<https://sfvaac.org/login>

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 (sfvaac.org)

- 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

2.1.2 Westlinks Online

Westlinks Online is your service provider and the developer of Convention Manager. They maintain and host sfvaac.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

2.1.3 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)

2.1.4 Zendesk

Managed by Westlinks Online, Zendesk manages the support desk platform. Email sent to support@sfvaac.org and submissions of the Contact Us form on sfvaac.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 account 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/>

2.1.5 Mailchimp

Mass email communications are managed through Mailchimp. This account is managed by Sande Budwig. We do not have any details.

Login:

<https://login.mailchimp.com/>

2.1.6 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 commercial 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 SFV 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/>

Chapter 3

Website Administration

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

3.1 Admin Dashboard

This is the top level admin page consisting of several cards with statistical reporting. 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.

3.1.0.1 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

3.2 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.

3.2.1 Public

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

3.2.1.1 How to Add/Remove a Public Announcement

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

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

3.2.2 User Specific

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 announcement will be placed directly below it.

3.2.2.1 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 announcement
3. Click their name to load the user detail view
4. Scroll down to User announcements
5. Click the CREATE button
6. Type in the announcement
7. Click SAVE

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

3.3 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.

3.3.1 Menus

Content

3.3.2 Pages

Content

3.3.3 Media Library

Content

3.4 Events

Content

3.4.1 All Events

Content

3.4.2 Al-Anon Events

Content

3.4.3 Event Roles

Content

3.4.4 Meals

Content

3.4.5 Marathon Meetings

Content

3.4.6 Speaker Meetings

Content

3.4.7 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.

3.5 Locations

Content

3.5.1 Locations

Content

3.5.2 The Zoom Location

Content

3.6 E-Commerce

E-Commerce sales are based on Categories and Products. A Category can have 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

3.6.1 Products

Content

3.7 Reporting Dashboard

Content

3.7.1 Sales

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

3.7.2 Products Sold

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

3.7.3 Service Commitments

- Greeters
- Hospitality
- Marathon Leaders
- Security
- Speakers

3.7.4 Sporting Events

- Golf Teams
- 10K Walk / Run

3.8 Settings

Content

3.8.1 Settings

Content

3.9 Support

Content

3.9.1 Settings

Content

3.9.2 Website Manual

Content

3.9.3 Zendesk Tickets

Content

3.9.4 Voicemails

Content

3.9.5 Voicemail Greeting

Content

3.9.6 Westlinks Support

Content

3.10 Users

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

3.10.1 User Roles

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