# Balticon Registration System Vendor Documentation

The vendor module within the Balticon Registration system was recently enhanced and made configurable across the many conventions using the system. The vendor subsystem consists of three sections:

- Vendor Space Configuration At present this is direct creation of the database tables. A
  future task will be to provide screens within the reg\_control portion of the system to allow
  direct editing of these tables.
- 2. Vendor Portal
  - a. Signup of vendors
  - b. Vendor space requests
  - c. Vendor space and membership payments
- 3. Reg\_control vendor menu item
  - a. Add/Edit vendors
    - i. Add mail in vendor applications to the system
    - ii. Review and edit vendor information including their website and business description
    - iii. Perform server side password resets. (Note the vendors can do this themselves via the vendor portal
  - b. Add/Review/Approve vendor space request
    - i. Add new space requests for mail in vendor applications
    - ii. Approve space requests (for any amount of space, not just what the requested)
  - c. View current status of the process
    - i. Show when vendors have paid

# **Vendor Space Configuration**

While vendors enter their data once for the portal and it persists from year to year, like membership categories, available vendor space types need to be entered for each convention year.

Vendors can request space in any or all of the spaces configured into your system using the vendor portal. Each space request will show up individually in the portal and in the reg\_control interface.

It is up to each convention to decide how they want to configure their spaces, but common usage might include:

- Different Dealers Rooms
- Spaces controlled by different organizations within your convention

Spaces are organized by type and name. At present the system supports the following types of spaces (and their recommended usage):

- a. artshow for vendor spaces that are controlled by the art show team.
- b. dealers for vendor spaces that are controlled by the dealers team
- c. fan for fan tables
- d. virtual for virtual spaces independent on how they are hosted

Currently it is a pick one of this pre-set list of options. If you need options not in this list, please contact your administrator who will reach out to the development team to expand it.

Multiple spaces of each type can be configured, they just need to have different names.

For each space configured you then decide what price offerings you wish to make available for that space. This allows you to set the price, membership characteristics, and number of units allocated for each item. Vendors can only select one 'offering' for each space they wish to request. You can approve any offering for that vendor regardless of what they requested. And the system even supports offerings that are available but not requestable allowing for special allocations.

# **Individual Spaces**

Vendor spaces are sold in increments of units. Think tables, frontage space, etc. Units are numbers with two decimal places, so one half table is easy to specify. For each space you will need to decide what your base unit is. Then you can decide how you want to sell that space, either as whole or fractional units, so some combination of the two.

Vendor spaces can also allow for pricing included and additional memberships to be sold along with the space.

- Included Memberships: the price of the membership is included in the price of the space. Vendors can buy 0 to the number of included memberships included with their space purchase. In the registration system, these memberships will show up as \$0 price memberships as the price for the space covers their purchase. It is useful to create a specific membership type for this use. The same membership type can be used across all of the spaces, or a different one can be assigned to each space created.
- Additional Memberships: memberships that can be purchased at some 'price' when you buy your space. Generally these memberships are only available when you buy the space, but there is nothing stopping you from configuring the system to allow you administrator or on-site people to sell memberships of this type at the convention. These are not \$0 price memberships. The vendor can purchase 0 to the number of allowed additional memberships for this space. Because this membership type is not \$0 price, it must be a different type than the one for included memberships. However, the same membership type can be

used for additional memberships across all of the spaces, or a different one can be assigned to each space created.

There are some prerequisites that you will need to provide to your administrator for each space to be entered into the database:

- 1. Space Type: this is one entry from the space type described above.
- 2. Short Name: A short (32 characters or less) name for the space itself, it should be something simple for the team. (examples: 'dealers', 'alley')
- 3. Name: the name presented to the vendors for this space. Maximum length is 128 characters. (examples: 'Dealers Room', 'Artist Alley')
- 4. Description: A long description of the space. It is used to explain the space to the vendors in the portal. This field does not have a limit on length.
- 5. Total Units Available: used to help guide you in allocating units, it is the total number of units you can provide.
- 6. Membership type to use for included memberships
- 7. Membership type to use for additional memberships

The administrator will create an entry in the vendorSpaces table for each space you are offering.

# Space Offerings (Prices)

Each space can have multiple offerings specifying the number of units, price, and included and additional memberships allowed. For each offering your administrator will create an entry in the vendorSpacePrices table.

You will need to provide the following information for each offering:

- 1. Which space does this offering apply to.
- 2. Display name for the number of units. (such as 'half' for 0.5 units, '1' for 1 unit, etc.)
- 3. Description of the offering (example "One 6ft Table" or 'Half a 6ft table")
- 4. Number of units: (Decimal number, such as 0.50, 1.0, 2.0, etc.)
- 5. Price: this is the total price, not the price per unit, and this price will include the included memberships.
- 6. Included Memberships: the number of included memberships, of the type configured in the space entry above, paid for with the space price from 0 to some reasonable number. There is no fixed maximum, but the payment form will get long if this is large.
- 7. Additional Memberships: the number of additional memberships, of the type configured in the space entry above, that the vendor will be allowed to buy at the additional price of that membership type. This can be from 0 to some reasonable number. There is no fixed maximum, but the payment form will get long if this is large.
- 8. Is this entry 'requestable' or only 'approvable' for this space. (Example: a vendor can request up to 2 tables, but they can ask if you can give them a third. Only those requestable will appear in the request space form in the portal. All spaces appear in the reg control interface.

reg_control vendor page.	,	, ,	

Please provide this information in the order you want it displayed to the vendor and on the

# Vendor Portal

**Vendor Portal** 

Reset Password

The vendor portal is where your vendors will create their account, request space(s), and pay for approved spaces. For the screen captures for this document I have cut off the Convention Logo and used the development system's instance.

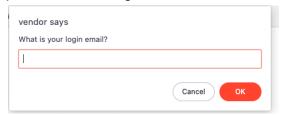
# Login Page

The vendor portal is usually located at https://vendor.`your con's url' and presents the vendor with the login/sign up page:

# Welcome to the Dev 2023 Vendor Portal. From here you can create and manage your account for vendors. Please log in to continue to the Portal. \*Email/Login: \*Password: signin or Sign Up

# Vendors with prior/existing accounts:

If the vendor already has an account, they should enter it on the form and click sign-in. Their email address is their login name and they chose their own password at sign-up. Vendor accounts remain in the system from year to year. But, vendor's don't always remember their password. Clicking the 'Reset Password' button produces the alert popup:



When they enter their email address it will email them a temporary password to use to sign into the system. The portal will give them a message saying that they have been sent a temporary password. They then return to the portal, use their email and that temporary password and are directed to a change password screen:

# **Vendor Portal**

	Change Password		
Re-enter Password:			
new Password:			
Old or Temp Password:			
You need to change your password.			
From here you can create and manag	ge your account for	vendors	S.
Welcome to the Dev 2023 Vendor Po	ortal.		

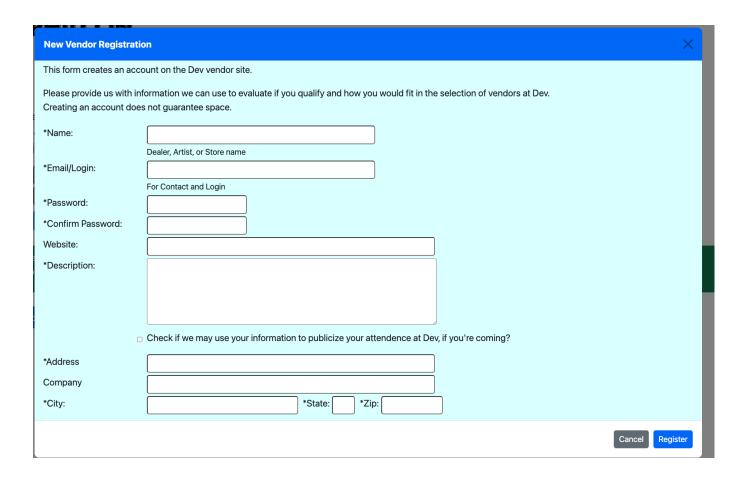
Entering that temporary password as the 'Old or Temp' password and their desired new password will allow them to reset their password and continue to the portal.

If their email address has changed, they will need to email the convention representative for vendors and ask them to update their account for their new email address. Once done they can use that new email address to reset their password, or use their old password to log into the portal.

#### **New Vendors:**

Vendors without accounts will need to create one. Pressing the sign-up Link on the login page will take them to the sign-up screen. On this screen they will fill in their information and click Register. This will create their account and log them into the portal. Advise them to put in the description block any information you will need to decide your space allocation decision. All fields preceded with an \* are required. NOTE: This creates their vendor portal account, it does not request any space. They will need to do this as a separate step after creating the account.

The portal sends the vendor email a confirmation email welcoming them to the Vendor Portal.



## **Existing Vendors**

Once logged in, they will see a screen similar to the one below. Primary actions have blue buttons, secondary actions have gray buttons. The screen is broken into two areas.

#### Vendor Account Area

The items i this area confirm which vendor account is being used and offer a chance to:

- Edit the profile they entered at vendor creation
- Change their password
- Logout from the vendor portal

# Vendor Spaces Area

This is the area where the vendor will

- Request space
- See the space they have requested and be able to alter the request
- Pay for approved spaces
- See paid confirmed spaces

Only one of those actions will be valid at any one time depending on where in the process they are.

## **Vendor Portal**

Welcome to the Dev 2023 Vendor Portal.

From here you can create and manage your account for vendors.

#### Welcome to the Portal Page for Syd Weinstein

View/Change your profile Change your password Logout

#### **Vendor Spaces**

Dev 2023 has multiple types of spaces for vendors. If you select a type for which you aren't qualified we will alert groups managing other spaces.

#### **Artist's Alley**

Artist Alley Tables

Request Artist's Alley Space

#### **Dealers Room**

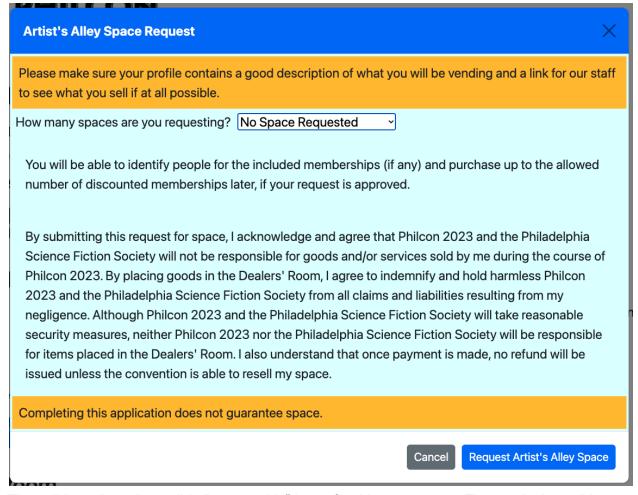
The primary space for vendors at Philcon is the Dealers Room in Grand Ballroom C. Space is predominately sold as 1/2, 1 or 2 six foot tables. Coordinate with the head of the dealers room if you want more than 2 tables. Your space purchase allows you to buy up to two dealer membrerships at a discounted price. Additional memberships will be available at normal rates. Dealers spaces are expected to be attended while the rooms are open Friday 4pm - 7pm, Saturday 10am - 6pm and Sunday 10am - 3pm.

Pay Dealers Room Invoice

The vendor space area shows a sub area for each vendor space configured in the system. In this example two different spaces are configured: "Artist's Alley" and "Dealers Room". Each space will be listed with its own action button. The description shown is the long description configured in the system for that space.

## Requesting Space

If no space of that type has been requested, the "Request Space" button is shown. When clicked the request space popup is shown.



The pulldown lists all possible "requestable" items for this space type. The text in the pulldown comes from the item description field in the configuration.

How many spaces are you requesting?

No Space Requested
One 6ft space for 50.00

You will be able to identify people for
Two 6ft spaces for 100.00

The paragraph about memberships is fixed text and not configurable. The disclaimer paragraph below the membership paragraph is optional and comes from the configuration file using the [vendor] section tag "reg\_disclaimer".

Once they have chosen their space they press the request. They receive a confirmation email confirming their request. A copy of this email is also sent to the address configured in the configuration file in the [vendor] section with the tag name matching the shortname in the space configuration table.

The portal will update to show:

# **Artist's Alley**

**Artist Alley Tables** 

Request pending authorization for One 6ft space.

Change/Cancel Artist's Alley Space

#### Changing/Canceling a space request

Pressing the "Change/Cancel Space" button will show a similar popup as request did, allowing them to change or cancel their space request.

# **Change/Cancel Artist's Alley Space Request**

Please make sure your profile contains a good description of what you will be vending and a link for our staff to see what you sell if at all possible.

How many spaces are you requesting? One 6ft space for 50.00

You will be able to identify people for the included memberships (if any) and purchase up to the allowed number of discounted memberships later, if your request is approved.

By submitting this request for space, I acknowledge and agree that Philcon 2023 and the Philadelphia Science Fiction Society will not be responsible for goods and/or services sold by me during the course of Philcon 2023. By placing goods in the Dealers' Room, I agree to indemnify and hold harmless Philcon 2023 and the Philadelphia Science Fiction Society from all claims and liabilities resulting from my negligence. Although Philcon 2023 and the Philadelphia Science Fiction Society will take reasonable security measures, neither Philcon 2023 nor the Philadelphia Science Fiction Society will be responsible for items placed in the Dealers' Room. I also understand that once payment is made, no refund will be issued unless the convention is able to resell my space.

Completing this application does not guarantee space.

Cancel

Change/Cancel Artist's Alley Space

Please make sure your profile contains a good description of what you v to see what you sell if at all possible. Cancel Space Requested

How many spaces are you requesting? ✓ One 6ft space for 50.00

Two 6ft spaces for 100.00

The change request also sends a confirmation email to the same addresses. The portal will continue to show this pending message until the space is approved in the reg\_control vendor section.

#### Paying for an approved space request

When the space request is approved in the reg\_control vendor section the vendor will receive an approval email asking them to sign into the portal and pay the invoice. The vendor then sees the space section approve with the "Pay Invoice" button:

#### **Dealers Room**

The primary space for vendors at Philcon is the Dealers Room in Grand Ballroom C. Space is predominately sold as 1/2, 1 or 2 six foot tables. Coordinate with the head of the dealers room if you want more than 2 tables. Your space purchase allows you to buy up to two dealer membrerships at a discounted price. Additional memberships will be available at normal rates. Dealers spaces are expected to be attended while the rooms are open Friday 4pm - 7pm, Saturday 10am - 6pm and Sunday 10am - 3pm.

#### Pay Dealers Room Invoice

Pressing the button brings up the payment popup. This popup is very large and has up to 5 sections in it:

#### Sections 1 and 2: Confirmation

Confirmation of the space being paid for and confirming that the vendor information is still correct. It allows updating the vendor information.

If the checkbox about purchasing memberships is not checked acknowledging that they must be purchased at this time to get a discount, the system will require them to enter at least one membership.

The prompt for the sales tax id comes from the configuration file. If the prompt is the empty string, the field is suppressed.

The total space cost is the cost of the space from the space configuration. Since included memberships (if any) are part of this price they will not effect the total price at the bottom of the form. It does not include additional memberships and those will appear at the bottom of the form.

Pay Dealers Room Invoice X			
Syd Weinstein you are approved for Two 6ft tables  This space comes with 2 memberships included and the right to purchase up to 2 additional memberships at a reduced rate of \$40.00.			
All vendors must have a membership for everyone working in their space. Included and additional discounted memberships can only be purchased while paying for your space. If you do not purchase them now while paying your space invoice, you will have to purchase them at the current membership rates.			
If you are unsure who will be using the registrations please use the first name of 'Provided' and a last name of 'At Con'. The on-site registration desk will update the membership to the name on their ID.			
Program participants do not need to buy memberships; however, we will confirm that they meet the requirements to waive the membership cost. If they do not, they will need to purchase a membership on-site at the on-site rates.			
If you do not w for memberships	ish to purchase any memberships at this time, check this box to acknowledge the requirement above.		
Vendor Information  Please fill out this section with information on the vendor or store. Changes made to the Vendor Information part of this form will update your profile.			
Name:	Syd Weinstein		
Email:	sydweinstein@gmail.com		
Address:	3837 Byron Rd		
Company/	Syd Weinstein Productions		
Addr2: City:	Huntingdon Valley State: PA Zip: 19006		
NJ Sales Tax ID:			
Cost for Spaces \$	3205.00		
Special			
Requests:			

#### Section 3: Included Memberships

If the configuration of this space is defined with a non zero number of included memberships, this section will list the number of included memberships and provide a block to enter each included membership.

Included Memberships	: (up to 2)		
·	,		
ncluded Member 1:			
First Name	Middle Name	*Last Name	Suffix
Address			
Company/2nd Address line			
City	*State *Zip	Country	
		United States	•
Email		Phone	Badge Name (optional)
			defaults to first and last name
ncluded Member 2:			
First Name	Middle Name	*Last Name	Suffix
Address			
Company/2nd Address line			
City	*State *Zip	Country	
		United States	•
Email		Phone	Badge Name (optional)
			defaults to first and last name

If any field is entered in the membership sub blocks, the required fields are enforced. If they are entirely blank, the included membership is 'declined' and not entered. The system will require that included memberships be used before the additional ones.

#### Section 4: Additional Memberships

If the configuration of this space is defined with a non zero number of additional memberships, this section will list the number of additional memberships and provide a block to enter each additional membership.

Included Membership	os: (up to 2)		
ncluded Member 1:			
First Name	Middle Name	*Last Name	Suffix
Address			
Company/2nd Address line			
City	*State *Zip	Country	
		United States	
Email		Phone	Badge Name (optional)
			defaults to first and last name
ncluded Member 2:	Middle Name	*LAN	0.45
FIRST Name	Middle Name	*Last Name	Suffix
Addesse			
Address			
Conseque One Address line			
Company/2nd Address line			
Oit.	******	Orwinter	
City	*State *Zip	Country United States	•
- "			
Email		Phone	Badge Name (optional)  defaults to first and last name
			delauits to first and last flame

Again, if any field is entered in the membership sub blocks, the required fields are enforced. If they are entirely blank, the additional membership is 'declined' and not entered. The system will require that included memberships be used before the additional ones.

#### Section 5: Total Cost and Payment:

This section shows the additional costs for memberships (if additional\_memberships are allowed) and the total cost. It also solicits the payment information. It pre-populates the vendor address and email, but can be overridden here.

Cost for	\$0
Memberships:	
Total: 90.00	
Payment Informat	tion:
Name:	First Name Last Name
Street:	3837 Byron Rd
City:	State: Zip:
Country:	United States ~
Email:	sydweinstein@gmail.com
We Accept  WISA  AMERICA  DOTAGE  DOTAGE  DOTAGE  AMERICA  DOTAGE  DOT	N DISCOVER NETWORK
Philadelphia Scie course of Philcor 2023 and the Ph Although Philcon neither Philcon 2	is space I certify that I have read and agree to this statement. I agree that Philcon 2023 and the ence Fiction Society will not be responsible for goods and/or services sold by me during the a 2023. By placing goods in the Dealers' Room, I agree to indemnify and hold harmless Philcon iladelphia Science Fiction Society from all claims and liabilities resulting from my negligence. a 2023 and the Philadelphia Science Fiction Society will take reasonable security measures, 023 nor the Philadelphia Science Fiction Society will be responsible for items placed in the also understand that once payment is made, no refund will be issued unless the convention is space.
Please wait for the Card number	e email, and don't click the "Purchase" button more than once.  MM/YY CVV
Purchase Rese	t

The disclaimer shown comes from the pay\_disclaimer tag in the [vendor] section of the configuration file.

On successful purchase a confirmation email is sent to the vendor and the address from the configuration file for this space short name.

# Paid confirmed spaces

Once the space has been paid for the portal changes to show the full registered spaces:

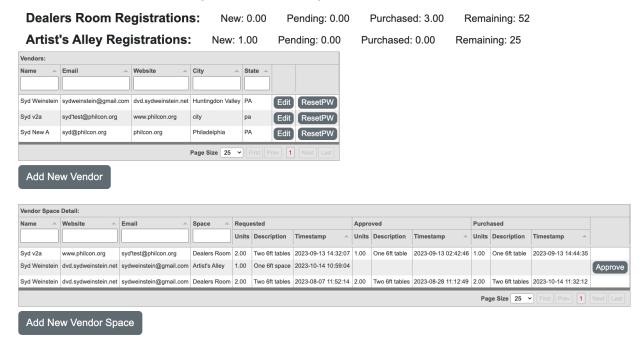
#### **Dealers Room**

The primary space for vendors at Philcon is the Dealers Room in Grand Ballroom C. Space is predominately sold as 1/2, 1 or 2 six foot tables. Coordinate with the head of the dealers room if you want more than 2 tables. Your space purchase allows you to buy up to two dealer membrerships at a discounted price. Additional memberships will be available at normal rates. Dealers spaces are expected to be attended while the rooms are open Friday 4pm - 7pm, Saturday 10am - 6pm and Sunday 10am - 3pm.

You are registered for Two 6ft tables

# Vendor Management page in reg\_control

The vendor process is managed from within reg\_control via the "Vendor" menu item.



The first section is a summary of the progress in the vendor selection, approval and payment. It lists a row for each space type configured with the following fields:

- New: total units of new space requests not yet approved (received but not yet approved)
- Pending: total units of approved but not yet paid space requests
- Purchased: total units of space purchased
- Remaining: total units available less the units approved

The next section is for managing vendor portal accounts. The "Edit" button allows directly editing the same data as the vendor can do in the portal. It uses a similar popup for this purpose:

Update Vendor F	Profile	× × × × × × × × × × × × × × × × × × ×
Name:	Syd Weinstein	
n Email:	sydweinstein@gmail.com	
Website:	dvd.sydweinstein.net	
Description:	DVDs of Sci Fi Conventions	
	Both local and worldcons!	
	☑ Check if we may use your information to publicize your attendence at Dev	
Address	3837 Byron Rd	
<sup>h</sup> Company/ Addres	Syd Weinstein Productions	
line 2: City:	Huntingdon Valley State: PA Zip: 19006	
to.		Cancel Update

The "ResetPW" button produces an alert with a random 'Temporary' password.

reg says

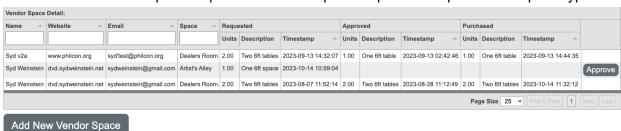
#W@aTE!0cBud



Cut/paste this temporary password and email it to the vendor. They will use this temporary password and their email address to log in to the portal. The portal will then require them to change their password. This temporary password will be the 'old or temporary password' on that screen.

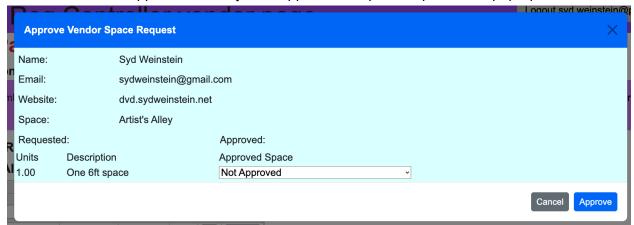
The "Add New Vendor" button is used to enter vendors manually. It uses a similar form to the edit form above and will allow you to enter mailed in vendor requests. It only creates the vendor portal account. No password is assigned yet, so the "ResetPW" button, once the vendor is created, will be necessary if that vendor wishes to log into the Portal to pay for their space.

The third section is for space requests. It lists all space requests independent of space type.



The blanks at the top of the columns will allow for filtering the list. The arrows sort the list by those fields.

The action button "Approve" allows you to approve the space request via a pop-up:

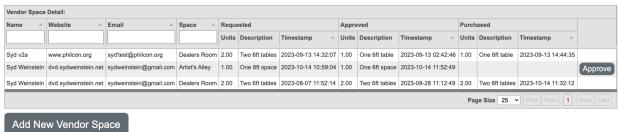


It also allows you to change the approval for an existing approved but unpaid request. Note that you can approve for any space amount, not just the requested space, including space items marked 'not requestable'.



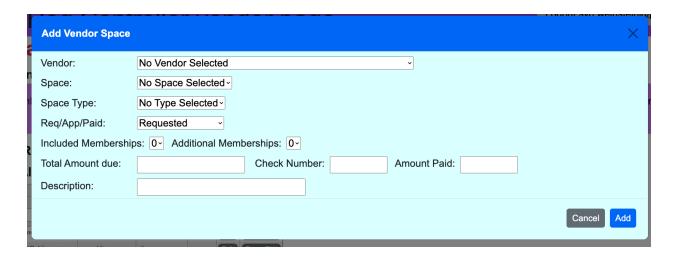
Once approved an email is sent to the vendor to pay for the space.

Notice how once approved the approve button remains even though the current approval amount is displayed:



Pressing the approve button in this case will allow you to edit the amount approved (including changing it back to not approved) and sends an update email to the vendor.

The "Add New Vendor Space" button is for handling mail in requests with payment. It depends on the vendor account already being created, which you can do with the 'Add New Vendor' button in the prior section. It opens the add vendor space pop-up:



The vendor pulldown is a list of all vendor accounts. Select the appropriate vendor account. The space type choses which type of space this vendor requested. Once selected the space type pulldown updates.

The space type pulldown selects how much space they have requested.

The Req/App/Paid pulldown allows you to set the status of the request. (Requested, approved, or approved and paid).

NOTE: If the space is prepaid, it cannot be entered until you are ready to approve the space. You will not be given the chance to mark a request paid by check. Only the vendor portal can pay an existing request.

When marking the space paid, you need to enter:

- The number of included and additional memberships assigned to this vendor. This will update the total amount due field.
- The check number and amount paid fields
- Anything you wish to track in the description field

NOTE: you will need to use the registration menu item in reg\_control to enter the memberships.