



Self-Serve Sponsorship Opportunities

This specification outlines a system whereby companies can purchase sponsorship opportunities.

Definitions:

For the purposes of this specification, the following terms are defined as follows.

Client: The company, individual or other entity which licenses the use of ConferenceBrain.

Conference: A live educational event run by Client.

Front End (FE): The parts of ConferenceBrain which are accessible to website visitors both with and without a password. For example, the Create Account form is part of the Front End of ConferenceBrain.

Back End (BE): The parts of ConferenceBrain which are accessible only to the Client. For example, the Edit Web Page interface is part of the Back End of ConferenceBrain.

Admin: An individual authorized by Client to access the Back End of their ConferenceBrain installation.

Visitor: Any person who is viewing the Front End of ConferenceBrain.

Account: The record of information, including email and password, of a single individual as stored in ConferenceBrain. Any individual who logs into ConferenceBrain needs a unique account.

Exhibitor: Companies who purchase exhibit space at the Conference.

Authorized Agent: An account that has been linked to a Company record in the BE by an Admin. Authorized Agents are allowed to register companies as Exhibitors for a Conference.



Included Functionality:

- 1 In the BE Sponsorship Opportunity page:
<https://try.conferencebrain.com/admin/conference/6/sponsorship-opportunities>
 - 1.1 Add a numeric input field for "Sponsor Limit" with a default value of 1 for each sponsorship opportunity. The limit field is placed above the existing Select Sponsor widget.
 - 1.1.1 The Sponsor Limit is the maximum number of sponsors that can be assigned by an admin in the BE and/or purchase the opportunity from the FE.
 - 1.1.2 If the Sponsor Limit is set to 0, an unlimited number of Sponsors can purchase or be assigned by an Admin and/or purchase the opportunity in the FE.
 - 1.1.3 If sponsorship is purchased in the FE and paid for by credit card, the purchase automatically counts toward the sponsor limit for that sponsorship opportunity.
 - 1.1.4 If sponsorship is purchased in the FE and paid for by check, the purchase does NOT automatically count toward the Sponsor Limit. The check payment must be marked as received before the purchase will count toward the Sponsor Limit.
 - 1.1.5 If the Sponsor Limit has been reached, an Admin will be unable to assign a sponsor to the opportunity.
 - 1.2 Add a checkbox for "Allow Purchase" for each sponsorship opportunity. The new checkbox is placed underneath the existing Sponsors widget.
 - 1.3 If a company has been assigned to a sponsorship opportunity by an Admin, list the company name in the sponsor section with an "Assigned By Admin" tag.
 - 1.4 If a company has purchased a sponsorship opportunity in the FE and paid by credit card, list the company name in the sponsor section with a "Paid" tag.
 - 1.5 If a company has purchased a sponsorship opportunity in the FE and paid by check, list the company name in the sponsor section with a "Pending Payment" tag. Link the Pending Payment tag to the Edit Order record in the BE.



- 1.6 ALL sponsorship opportunities purchased in the FE require Admin approval before the company is listed as a sponsor in the FE Public Sponsorship Opportunity page.
 - 1.6.1 If a company has completed payment by credit card or by check which has been marked received, show an “Activate” button next to the company name in the sponsor section.
 - 1.6.1.1 If the Sponsor Limit has not been reached, clicking the Activate button will change the status of the sponsorship to Active.
 - 1.6.1.2 If the Sponsor Limit has been reached, clicking the Activate button will display an error and the sponsorship status will not change.
 - 1.6.2 If a sponsorship has been Activated, show an “Active” tag and a “Deactivate” button next to the company name. Clicking the Deactivate button will change the status of the sponsorship to Inactive.
- 1.7 Sponsors can be removed from opportunities using a “Delete” button next to each company name.
- 2 In the FE Public Sponsorship Opportunity page:
<https://try.conferencebrain.com/conference/CB/sponsorship-opportunities>
 - 2.1 If an opportunity is allowed for purchase in the BE, and the Sponsor Limit has not been reached, show a "Purchase Sponsorship" button next to the "Sponsorship Available" tag for the opportunity.
 - 2.2 If an opportunity has been purchased by a company, and activated by an Admin in the BE, list the company in the Sponsored By section of the opportunity.
 - 2.2.1 If more than one sponsor is listed, sort the sponsors based on the date their sponsorship was activated by an Admin.
 - 2.2.2 If an Admin assigns a company in the BE to the same opportunity that was purchased by a different company in the FE, list the companies that were assigned by an Admin before companies that purchased the opportunity in the FE. Sort Admin assigned companies by the date that they were assigned.
- 3 An Authorized Agent for a company can purchase a sponsorship from the FE by clicking the Purchase Sponsorship button.
 - 3.1 An Authorized Agent must complete a separate transaction for each Sponsorship Opportunity they wish to purchase.



- 3.2 When an Authorized Agent purchases a sponsorship, an invoice or receipt is emailed to the Agent, company contact, and Admin the same as when purchasing exhibit space.
 - 3.2.1 The invoice or receipt lists the name of the conference and the name of the purchased sponsorship opportunity.
- 3.3 If a Visitor is logged into their Account but is not an Authorized Agent for a company, they will be prompted to identify their Company or create a new company record the same as when purchasing exhibit space.