

# Events Manual

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# Welcome

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Thank you for choosing CimpleBox for your business.

This manual is written to guide our users on the features of CimpleBox.

If you are new to the system, please make sure to check out the [Getting Started](#) topic.

We have also collected some of the questions our customers have asked into the [Common Questions](#) topic.

Thank you again for partnering with us, and please feel free to contact us if you need any additional assistance.

Sincerely,

CimpleBox Team



# Getting Started

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Here are some topics that will help you get up and running quickly.

## URL

**Calendar URL:** Every calendar has a unique URL, and this should have been emailed to you. If you need this again, contact our support team at [support@cimplebox.com](mailto:support@cimplebox.com).

**Admin URL:** This is where you manage your Events. To log in, go to <https://store.cimplebox.com> and use the login information provided to you.

## Creating an Event

Follow these directions to add an Event to your calendar: [How to add an Event](#)

## Add additional users

Follow these directions to add an additional user that can log in to manage your Events: [How to add a User](#)

# Event Management

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The **Event Management** page lists all Events for the selected month. From here, you can edit and add Events to your calendar.

Click the [Store](#) > [Events](#) > [Event Management](#).

## Date/Time

Time of the Event.

## Event

Event information including the title and the image selected for this Event.

## Location

Venue selected for this Event. For more information on Venues, view our [Venue Management](#) topic.

## Staff

List of employees assigned to this Event, such as instructor or model.

## Statistics

- Sold – seats sold
- Max – maximum seats
- Available – remaining available seats
- Waiting List – number of people on the Waiting List
- Total – total revenue generated by the registrations.

Click an Event to open the Event Details page.

To add an Event, click [Add New Event](#) near the top of the page. You can also find this under [More Options](#).



## Related Topics

- [Adding a New Event](#)
- [Event Image](#)
- [Venues](#)

- Display Options

# Add/Edit an Event

---

Go to [Store](#) > [Events](#) > [Event Management](#).

Click [Add New Event](#) to create a new Event, or click an Event to edit it.

## Event Details

### Event Name

The Name will appear on the Calendar and other pages.

### Description

This will appear on the Event Preview and Registration pages. Use this to explain more about the Event to your guests.

### Location

Specify the Venue for this Event, which will show on your calendar. You can edit the list of Venues under [Venue Management](#).

### Product/Service

Categorize your Event for future reports to analyze your source of Event revenues.

### Available Seats

This is the maximum seats available for this Event. Once the registration count reaches this number, the calendar will automatically mark the Event as “Sold Out”. If you’ve enabled the **Waiting List** for this Event, the calendar will give your customers the option to join the Waiting List.

### Event Staff

Assign one of your employees to this Event (for example, instructor), and choose whether to show the employee on the calendar.

## Registration Details

Check the **Enable Online Registration** box to allow your guests to register themselves through the public Calendar

- Accept Promotional Codes
  - Limit Promotional Codes for this Event



- Accept Gift Certificates
- Enable Waiting list – *When checked, this will give your customers the option to join the Waiting List when the Event is sold out.*
- Display “Sold Out” on Calendar when full
- Password required for this Event – *If this is checked, a password will be required to register for this Event.*

#### Send Reminder Email

Check this box to email each guest before the Event. To change the text of the message or when the Reminder is sent, go to [Event Settings](#).

#### Send Thank You Email

Check this box to email each guest after the Event. To change the text of the message or when the email is sent, go to [Event Settings](#).



#### **Related Topics**

- [Event Settings](#)

# Event Image


---

You can select an image for an Event to display on your Event Calendar.

Click the [View/Select Image](#) link on the Event Details page.

Click the [Change Image](#) link in the Current Image window.

- The Select Image window will show folders and files from your Events Images folder.
- Click on an image to assign it to this Event.

To upload a new image, click the  [Upload File](#) link to upload a new image to your Event Images folder. Once an image is uploaded it is part of your Event Images library for any future Events.



## Note

- There is file size limit of 10MB per image.
- If the upload links are not available, it is possible that your corporate office may have disabled this capability. Contact your corporate office for permission if you do not see the [Upload File](#) and [New Folder](#) links.
- To manage all your Event Images, you can go to [Resource](#) > [Documents](#) > [Event Images](#). You will be able to Delete, Rename, Upload New Version and other file management actions for these Event Images.

# Venues

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A Venue is the location for an Event. Add Venues so that your guests can see where your Events take place.

A Venue could be your studio, a restaurant, or a company office.

Once you assign a Venue to the Event, the name of the Venue will appear on your public calendar and the registration pages.

To manage **Venues**, go to [Store](#) > [Events](#) > [Venues](#).

## Add a Venue

On the Venues page, click [More Options](#), and then click [New Venue](#).

Once the **New Venue** page opens, enter the information for this Venue.

## Edit a Venue

On the **Venues** page, click on the Venue you want to edit.

On the **Edit Venue** page, enter the information for this Venue.

## Delete a Venue

On the **Venues** page, click on the Venue you want to delete.

On the **Edit Venue** page, click [More Options](#), and then click [Delete Venue](#).

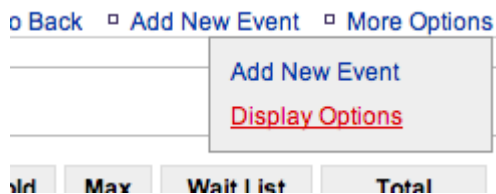
# Display Options

---

**Display Options** allow you to customize the **Event Management** page.

To do this, go to [Store](#) > [Events](#) > [Event Management](#).

On this page, click [More Options](#) > [Display Options](#).



On the **Display Options** page, select your choices.

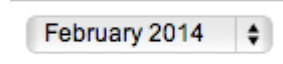
## Event Display Options

From the list of items, select the ones you'd like to see in the **Event Management**. Some items have additional options you can set such as to highlight when your seats remaining reach a certain number.

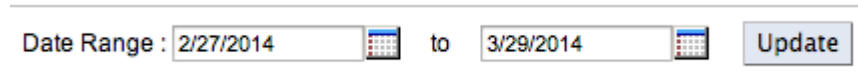
## Event Date Filter

You can view your Events listed month-by-month or by a data range.

If you select **Months**, the page will display the current month by default allowing you to select other months through a pull-down.



If you select **Date Range**, the page will display the Events occurring in the next 30 days.



# Registration

---

Registration for an Event typically happens through your online calendar, but there are other ways as an administrator of your account to register them. Please make sure to check out the other topics on registration.

When your customer registers for your Event, they will always be listed in the **Registration List** section of the **Event Details** page of that event.

Registration List					
Name	Email	Seats	Total	Status	Registered ▼

To go to an Event, go to [Store](#) > [Events](#) > [Event Management](#) and select the Event.

From the list of the registrations, you can click on a registration to view more details and perform registration specific actions.

Please make sure to view the following topics for more details:

- [Register a Guest](#)
- [Charge an Event](#)
- [Process a Refund](#)
- [Waiting List](#)
- [Move a Registrant](#)
- [Take Attendance](#)



## Related Topics

- [Search Registration](#)

# Register a Guest

---

In most cases, your customer will register directly through the calendar, but you can also register a guest through your Admin account. A typical application of this is if a customer walks into the Studio or calls to register for a class.

Go to [Store](#) > [Events](#) > [Event Management](#) and select the Event to register the customer.

In the **Event Details**, go to [More Options](#) > [Register Attendees](#)

	<a href="#">Go Back</a> <a href="#">Edit Event</a> <a href="#">More Options</a>
Registered: 0	<a href="#">Edit Event</a>
Available: 50	<a href="#">Delete Event</a>
Waiting List: 0	<a href="#">Copy Event</a>
Total Sales: \$0.00	<a href="#">Charge Event</a>
	<a href="#">Register Attendees</a>
	<a href="#">Registration Report</a>
	<a href="#">Attendance</a>
	<a href="#">Export Registrations</a>

In the following page, complete the form to finalize the registration.

## Note

- Email Address is required if you'd like to tie this registration to an Account.
- Select the appropriate **Seats** to correctly update the available seats for this Event.

# Charge an Event

---

Use the Charge Event feature to accept payment for an Event without registering any specific seats.

For example, you might use this as a deposit for a private Event.

On the Event page, click [More Options](#) > [Charge Event](#).

On the Charge Event page, enter the name in the **Customer Information** section.

Under the **Payment** section, enter the **Amount** and the **Payment Type**.

Clicking Credit Card as the Payment Type will open a **Billing Information** form where you can enter the credit card information.

# Process a Refund/Cancelation

To refund a registration, select the Event and in the **Event Details** page, select the customer you are trying to refund under **Registration List**

Registration List						
Name	Email	Seats	Total	Status	Registered ▼	

Once the **Registration Details** page, go to [More Options](#) > [Refund/Cancel](#).

[Go Back](#)
[More Options](#)

[Refund/Cancel](#)
[Move](#)

Registered: 2/25/2014 6

Status: Paid

On the **Refund** page:

1. Select the appropriate **Seats to Cancel**. *The number of seats selected would determine how many seats to free up for this cancellation. This will also calculate the amount to refund. Once the amount is calculated, you have an option to change the value if necessary.*
2. Select how the refund should be processed:
  - Original form of payment
  - Credit for future event – *A studio credit will be generated that can be used by the customer for any future Event*



## Note

- If a Promotional Code or a Gift Certificate was used, any refund/cancellation will restore those codes.



# Waiting List

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The Waiting List allows your customers to join a list for any of your Events that are full.

An Event automatically becomes “Sold Out” when the number of registered seats reaches the maximum set for the event. If you’ve enabled the Waiting List for this Event, the customer will not only see that the Event is full, but will be given the option to join the Waiting List.

To join the Waiting List, the customer will be asked only for their name, email address, and phone number. Anyone who leaves this information will show under the **Waiting List** section of the **Event Details** page.

## Waiting List

Number of people on the Waiting List: **10**

If a seat becomes available (typically because a registrant cancels), you can now “invite” directly from your **Waiting List**.

To invite someone (or any number of people), click on [View Waiting List ▶](#) link in the **Waiting List** section of the **Event Details** page.

In the **Waiting List** page, select the names to apply any of the following actions:

### Invite Checked

This will send an automated “invitation” email to the checked people to register. The automated email will provide a unique link for your customer to either “accept” or “decline” the invitation. If they “accept”, the link will take them directly to the registration page for that Event. (If you’d like to customize the content of the invitation email, go to [Event Settings](#))

### Retract Invitations

This will cancel any invitation already sent to the checked people on the Waiting List. Once retracted, their link provided in the original invitation email will not work. You can, however, send another invitation.

### Delete Checked

This will remove the checked people from the **Waiting List**.



## Note

- If an Event has available seats, but there are people on the **Waiting List**, the calendar will still show as “Waiting List” if the number of people on the **Waiting List** exceeds the number of available seats. This gives priority to the people on the **Waiting List**, allowing you to invite them to register for your events without the public being able to take open seats before you are able to address the **Waiting List**.
- If you send Invitations to more people than the available seats, the registration will be given to the first person to register through their invitation. The next person with an Invitation will then see a “Sold Out” message since the seat’s been filled by the first Invited person.

# Move a Registrant

In the case a registrant is unable to attend and needs to be moved to a different Event, you do not need to cancel the registration, but “move” the registration to the new Event.

To move a registration, select the Event and in the **Event Details** page, select the customer you are trying to refund under **Registration List**

Registration List						
Name	Email	Seats	Total	Status	Registered	

Once the **Registration Details** page, go to [More Options](#) > [Move](#).

[Go Back](#) [More Options](#)

Refund/Cancel

Move

Registered: 2/8/2014 6:30 AM

Status: Paid

In the following page, select the new Event to move the registrant to.

Move to: 

Select an Event

# Take Attendance

---

The Attendance page allows you to record who came to an Event based on who registered for the Event.

From the **Event Details** page, click [More Options](#) > [Attendance](#).

From the **Attendance** page, select the number of seats from each party attending the Event.

Seats	Attendance
1	0
2	0
2	0

# Accept Gift Certificates

---

Gift Certificates are a form of payment your guests can use to register for Events.

There are two main ways for your guests to use/redeem their Gift Certificates.

## 1. Directly through the Calendar

As your guest registers for an Event on your calendar, they can enter the Gift Certificate code during the checkout process. The system will automatically apply the full available amount, upto the amount due for your registration.

## 2. Through the Admin Login

Go to [Store](#) > [Events](#) > [Event Management](#) and select the Event to register the customer.

In the **Event Details**, go to [More Options](#) > [Register Attendees](#)

[Go Back](#) [Edit Event](#) [More Options](#)

Registered: 0	<a href="#">Edit Event</a> <a href="#">Delete Event</a> <a href="#">Copy Event</a> <a href="#">Charge Event</a> <a href="#">Register Attendees</a> <a href="#">Registration Report</a> <a href="#">Attendance</a> <a href="#">Export Registrations</a>
Available: 50	
Waiting List: 0	
Total Sales: \$0.00	

In the payment section of the registration form, click on “Apply Gift Certificate”.

Subtotal: \$

[\[ Apply Promotional Code \]](#)

[\[ Apply Gift Certificate \]](#)

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**Total Due: \$35.00**

You will also have the ability to apply partial amount of the Gift Certificate. To do so follow the steps to apply the Gift Certificate and then check on “User Partial Amount” to specify the amount to use.

Gift Certificate:

Available: **\$20.00**

☒ Use partial amount

Amount: \$



### Related Topics

- [Gift Certificate](#)

# Promotional Codes

---

Promotional Codes, or Promo Codes for short, allow you to offer discounts to your guests who register for Events.

To see your Promo Codes, go to [Store](#) > [Events](#) > [Event Management](#) > [Promotional Codes](#).

Use the **View**: dropdown to view Active Codes, Inactive Codes, or all Codes.

- Active Codes are valid, unexpired, and have at least one seat remaining.
- Inactive Codes are either expired or have no remaining seats.

Each Code has the following values:

- **Type**
- **Amount Per Seat**
- **Maximum Seats**
- **Used Seats**

Click the [Delete](#) link to remove a Code.

Use the **Search Code**: box to look for a specific Code.

To add a new code go to [More Options](#) > [New Codes](#).



## Related Topics

- [Adding New Codes](#)
- [Search Promotional Codes](#)

# Add Promotional Codes

---

Go to [Store](#) > [Events](#) > [Promotional Codes](#).

On the **Promotional Codes** page, go to [More Options](#) > [New Codes](#).

On the **New Promotional Codes** page, enter the Code or Codes in the text box. To enter multiple Codes, separate them by commas, or enter one code per line.

- For example, enter multiple codes like this  
AAAA, BBBB, CCCC, DDDD

- or enter them like this  
AAAA  
BBBB  
CCCC  
DDDD

After you click the  button, set the values that apply to all of these codes:

## Type

Select whether discount will be an Exact Amount (e.g. \$10 off) or a Percentage (e.g. 10% off the normal price)

## Discount Amount

Select the amount of the discount per seat. This will work with the **Type** selected above.

## Amount Received for Selling This Code

Optional. Enter the amount per seat, if any, you received for selling this code. This will properly update your Sales Reports when the customer uses one of these codes.

- For example, if a customer pays \$20 to Groupon for a coupon worth a single seat registration, then enter \$20 in this field.

## Maximum Seats



Set the number of times these codes can be used. Note that each use is equivalent to a single seat. For example, 2 uses would mean the code can be used twice for one seat each or once for two seats.

#### Date Restriction

Check the **Enabled** box to set an optional Start Date and End Date. You can enter just a Start Date, just an End Date, or both dates.

# Bulk Update Codes

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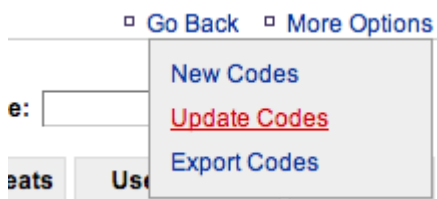
If you need to update a group of Promotional Codes at once, you can use the bulk update tool to select the group of codes to apply your change.

The general steps to apply a change to a group of Promotional Codes are:

1. Choose the set of Promotional Codes.
2. Set the changes you would like to make that will apply to **ALL** the Codes selected in step 1.

! This is a very powerful tool that allows you to make mass changes to potentially all your Promotional Codes. Please be certain about the changes you are making to the group of Codes you have selected.

To start, go to the **Promotional Codes** page then go to **More Options > Update Codes**.



From here you are given the two choices to select the Promotional Codes:

- Enter the Codes that you want to update  
This option will allow you to enter a set of codes directly into a text box.
- Search for Codes that you want to update  
This option will allow you to search the system based on the current setting of your Promotional Codes such as Discount Amount, Expiration Date etc.

Once the Promotional Codes have been selected, you are now ready to update or delete this selected group of Codes.

- To edit, click on the **Next >>** button.
- To delete, click on button **Delete** button.

In the “Edit” window, select the item you want to change for the chosen set of Codes.

- 
- Change: ☐ Discount Type and Amount  
☐ Amount Received for Selling Each Code  
☐ Maximum Seats  
☐ Promotion Start Date  
☐ Promotion End Date
- 

Once the changes have been entered, you can commit the change by clicking on the **Update** button.



The changes will take effect immediately, but depending on the number of Codes that are being updated, it may take a longer time than normal.

# Gift Certificates

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Gift Certificates are a form of payment your guests can use to register for Events.

Your guests may be able to purchase Gift Certificates online by themselves, depending on your studio account.

Even if you don't want to sell Gift Certificates online, you can use them as a form of studio credit.

Here are the different Types of Gift Certificates:

## **Generated**

This Gift Certificate was created directly in the Admin using the More Options > New Gift Certificate feature, or the Gift Certificate was imported from a non-CimpleBox system. There's no payment history for Generated Gift Certificates.

## **Purchased**

This Gift Certificate was sold through CimpleBox. The payment information is stored in a matching Gift Certificate Order.

## **Credited**

This is a Gift Certificate issued when an Event Registration is canceled to Studio Credit instead of a Refund.



## **Related Topics**

- [Gift Certificate Orders](#)
- [Search Gift Certificates](#)

# Gift Certificate Orders

---

Gift Certificate Orders are Gift Certificates purchased by your guests.

To view the Gift Certificate Orders, go to [Store](#) > [Events](#) > [Gift Certificates](#) > [Gift Certificate Orders](#).

On the **Gift Certificate Orders** page, click on any order to view the details of that purchase including the Gift Certificate(s) purchased by the customer.



## Note

- If you'd like to take orders directly from your customers on your website, email our support team at [support@cimplebox.com](mailto:support@cimplebox.com), and we can provide the URL for your customers to purchase gift certificates.



## Related Topics

- [Gift Certificate Template](#)

# Delete a Gift Certificate

---

There are two types of Gift Certificates in our system:

- Purchased
- Generated

**“Purchased”** Gift Certificates are those that your customers have purchased from you. These types of Gift Certificates can not be “deleted”, but must be refunded to inactivate the Gift Certificate. To refund a Gift Certificate:

1. Go to [Store](#) > [Events](#) > [Gift Certificates](#) > [Gift Certificate Orders](#)
2. Select the Gift Certificate Order to refund
3. Go to [More Options](#) > [Refund](#)

**“Generated”** Gift Certificates are those that are manually created through the Admin account or automatically created as part of giving the customer a studio credit. These types of Gift Certificates can simply be “deleted”:

1. Go to [Store](#) > [Events](#) > [Gift Certificates](#) > [Gift Certificates](#)
2. Select the Gift Certificate to delete
3. Go to [More Options](#) > [Delete Gift Certificate](#)



## Related Topics

- [Purchasing a Gift Certificate](#)

# Sell a Gift Certificate

---

To sell Gift Certificates through CimpleBox, let us know what prices you'd like to sell, and we can configure your studio to sell Gift Certificates online directly to your guests.

Once the prices are in place, we'll supply you with the URL to the Gift Certificates purchase page so that your guests can purchase Gift Certificates by themselves, just like they can register for Events.

Also, you can sell Gift Certificates through your admin account, in case you want to sell to a guest in studio or over the phone.

Go to [Store](#) > [Events](#) > [Gift Certificates](#) > [Gift Certificate Orders](#).

On the **Gift Certificate Orders** page, go to [More Options](#) > [New Order](#).

This will open the **New Gift Certificate Order** page. Select the quantities and prices, and then click Next to enter the Customer and Payment Information.

# Event Settings

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Use Event Settings to change calendar settings, edit on-screen messages, and customize email templates.

To go the Event Settings page, click the [Store](#) > [Events](#) > [Event Settings](#).

The Event Settings page is divided into different sections. Click any of the following links for more information

- [Calendar Settings](#)
- [Registration Fields](#)
- [Website Messages](#)
- [Emails](#)



# Calendar Settings

---

To go the **Event Settings** page, click the [Store](#) > [Events](#) > [Event Settings](#).

## Calendar Settings

### Start Calendar

The calendar will load the current month by default, but you can specify a future month to jump to as the default. To have the calendar start from the current week, select **Start on Current Week of Current Month** checkbox.

### View Past Months

By default, the calendar will not allow your customer to browse past months, but this option will allow them to navigate to any month in the past.

### Display Remaining Seats Count

This will show how many seats are remaining for each event. You can also specify when to show the number of seats remaining.

- *Example:* You can set the calendar to show remaining seats only when there are 5 seats or less remaining.

### Add Tax at Registration

You can specify the tax percentage to add at the checkout page. The total will be calculated based on percentage entered.

### Display Price in the Calendar

Shows the price of the event on the calendar. Note: the registration page will always show the price, and this setting is only on for the month view of the Events on the calendar.

### Enable Print

Once enabled, a print button will appear on the calendar that will print the calendar in a printer friendly format.

### Display Event Preview

This option will pop up a window on the month-view calendar to show the information of the Event.

### Self Service

Enabling this will allow your customers to create an account during registration. With an account, they will be able to use their login to register for future Events.

- Self Cancellation: This will allow your customers with an account created to be able to cancel on their own. You can also specify how long before the Event they will be able to cancel on their own.

# Registration Fields

---

To go the **Event Settings** page, click the [Store](#) > [Events](#) > [Event Settings](#).

## Registration Fields

These are the informations gathered from your customers during an Event registration.

Check the boxes to display the **Company**, **Address**, or **Phone** fields on the Event registration page, and the **Required** box as needed for any of those fields.

### Newsletter Subscription

During the registration process, your customer will be given an option to opt into the Newsletter. Once they opt in by checking a checkbox in the registration form, their email address will be collected as a “subscriber”. To find out more about Newsletters, view our topic on [Newsletter Management](#).

### Require to Agree to Terms

This will require your customer to agree to your terms by clicking a checkbox during the registration. The message of the terms can be configured by two parts below:

- Message to accept Terms

This is the message that will show next to the checkbox to agree to the terms.

- Term Details

This is the details of the terms.

# Website Messages

---

To go the **Event Settings** page, click the [Store](#) > [Events](#) > [Event Settings](#).

## Website Message

The following messages will appear on your Calendar or during the Registration process.

Click the [Edit](#) link for any item to change it.

### Waiting List Calendar Message

When an Event has a Waiting List, this displays on the sign-up page above the form fields.

### Waiting List Confirmation Message

After a guest signs up for the Waiting List, this displays on the following screen.

### Registration Confirmation Message

After a guest registers for an Event, this displays on the following screen.

### Registration Instructions

This displays on the Event registration page, below the Event details and above the form fields.

### Payment Instructions

This displays on the Event payment page above the form fields.

# Emails

---

To go the **Event Settings** page, click the [Store](#) > [Events](#) > [Event Settings](#).

## Emails

Personalize the following email templates for your guests.

Click the [Edit](#) link for any item to change it.

### Waiting List Invitation Email

This is the email guests receive when you invite them from the Waiting List.

### Registration Confirmation Email

This is the email guests receive after registering for an Event.

### Gift Certificate Confirmation Email

This is the email a guest receives after purchasing a Gift Certificate from your Event Calendar.

### Event Reminder Email

- This email will be sent to all registered guests for an Event before its Start Time
- Use the **Send** dropdown to choose when the Reminder Email should be sent.
- Check the **Enable by default when creating a new event** if you want this box pre-checked for new Events.
- Once you create an Event, you can enable or disable the Reminder when you edit that Event.

### Thank you Email

- This email will be sent to all registered guests for an Event after the End Time.
- Use the **Send** dropdown to choose when the Thank You Email should be sent.
- Check the **Enable by default when creating a new event** if you want this box pre-checked for new Events.
- Once you create an Event, you can enable or disable the Thank You when you edit that Event.

# Users

---

A user can be created to have access to the system or simply an employee to track in the system.

Some examples are:

- Studio employee to help with registration
- Instructor to run an Event
- Additional partner to run reports

To manage your users go to [Store](#) > [Labor](#) > [Employees](#).

From here you can click on an employee or create a new one by going to [More Options](#) > [Add New Employee](#).

## Employee Information

Basic information of the user including name and position.

## Additional Information

Additional, optional information of the user

## Site Access

This allows this users to have access to manage your Events and other information. To find out more, view our [Employee Access](#) topic.

# Employee Access

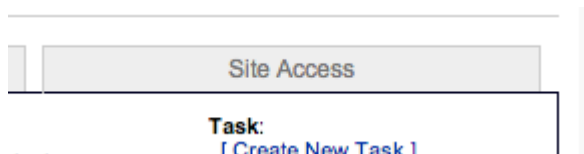
---

This allows you to give additional users access to manage your Events. With the full list of permissions to choose from, you will have the flexibility of selecting the appropriate access for each user.

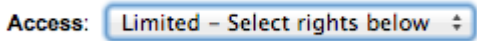
To give access to your user go to [Store](#) > [Labor](#) > [Employees](#), and select an employee.

Click [Edit Employee Information](#).

From the edit page, select the [Site Access](#) tab.



In the **Site Access** tab,

1. Check the **Give access to the Store Management site** check box.
2. Enter the Username and Password for this user. (We highly recommend using the email address as the username to easily retrieve and remember).
3. In the “Store Management Site Access Details” section, change the **Access** pull-down to **Limited**:  

4. Once **Access** has been set to **Limited**, you will now be given the full choice of options to give access to your employee. (Note: Once any access is changed, the employee will need to log out and log back in, for the the new permission to be in effect.)



## Related Topics

- [Users](#)

# Newsletter

---

Newsletters allow you to send an email to a group of people.

To create a new Newsletter, go to [Store](#) > [Newsletter](#) > [Newsletter Management](#).

Select an existing Newsletter to edit, or click on [New Newsletter](#) to start a new one.

## Subject

This would be the **subject** of the email that your recipients get. To set the subject, click on [Change Subject](#) link.

## Recipients

This would determine who would get the newsletter. To add new email addresses click on [Add](#) link.

When adding new recipients, you can choose three types to add:

- [Select attendees from past events](#)

This option will ask you to choose the Events in the past, and all the registrants for the selected Events will be imported as the recipients for this Newsletter.

- [Manually enter email addresses](#)

This option will give you a text box for you to type (or copy-and-paste) a list of email addresses to send this Newsletter.

- [Select all subscribers](#)

This option will import all the emails that were collected during registration (for those registrants that decided to opt in to your Newsletter). In order to populate this list, you must make sure **Newsletter Subscription** is enabled through the **Event Settings**. To find out more, see [Event Settings](#) topic.

## Message

This is the body of the email that will be sent out as the Newsletter. To change the message click on [Change Message](#) link.

You can also load message template by clicking on [Load Message Template](#) link. This is especially helpful if you send similar newsletters regularly. To find out more, see [Newsletter Template](#) topic.



## Related Topics



- [Subscribers](#)
- [Message Template](#)

# Subscribers

---

You can collect the email addresses from your customers as they register for your class.

If you have **Newsletter Subscription** enabled (To find out more, see [Event Settings](#) topic), your customers will be given an option to subscribe to the Newsletter as they register for a class.

You can view the subscribers by going to [Store](#) > [Newsletter](#) > [Subscribers](#).

## Add a new subscriber

You can manually add a new subscriber by going to [New Subscriber](#).

## Unsubscribe

Just click on the [Unsubscribe](#) link to remove the user from your subscriber list.

## Export

You can also export the subscriber list to a text file (.csv format) by going to [More Options](#) > [Export Subscribers](#). This will download a .csv file with the full subscriber list.

# Message Template

---

Newsletters Message Templates are a good way to save a Template to reuse for your Newsletter emails. A Template can be loaded when creating a Newsletter to save you time and avoid rewriting the entire message every time.

To create a new Newsletter Template, go to [Store](#) > [Newsletter](#) > [Newsletter Management](#).

From the **Newsletter Management** page, go to [More Options](#) > [Manage Templates](#).

From the **Templates** page, you can select an existing Template to edit by clicking on the Template name or to create a new one, go to [More Options](#) > [Add New Template](#).

Creating a new Template just requires the name of the Template and the content of the message. The content provided in the Template will be used whenever this Template is selected, when a new Newsletter is created.



## Related Topics

- [Newsletters](#)

# Common Questions

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These are a collection of commonly asked questions by our customers.

Our team will continue to share questions and answers that we receive.

Here are some topics from our customers:

- [Events & Registration](#)
- [Refunds](#)
- [Gift Certificates](#)
- [Employees](#)
- [Discount Codes](#)
- [Other Questions](#)

# Events & Registration

---

Here are some questions our customers have asked:

- [Event Locations](#)
- [Custom Registration Field](#)
- [Email Tags](#)
- [Second Event Image](#)
- [Payment Processor](#)
- [Event vs Transaction Date](#)
- [Using Studio Credit](#)
- [Sold Out Message](#)

# Event Locations

---

## Q: How do I add a new location or venue for my Events?

To add a new Venue that you can select for your Events, go to [Store](#) > [Events](#) > [Venues](#).

Click on an existing Venue from the list to edit it, or go to [More Options](#) > [Add New Venue](#) to add additional Venues. Once added, the new Venues will be available to select when creating or editing an Event.

If you're looking to add a separate calendar for a different location, please contact us at [support@cimplebox.com](mailto:support@cimplebox.com).



### Related Topics

- [Venue Management](#)

# Custom Registration Field

---

**Q: How do I add a custom field to my registration page such as “*Who would you like to sit with?*”**

Our registration system can have any number of custom fields that will be added to the registration form. Email us at [support@cimplebox.com](mailto:support@cimplebox.com) with the field to add to your calendar, and our team will add it for you.

# Email Tags

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## Q: What information can I include in my outgoing emails?

Your email templates are available under [Store > Events > Event Settings](#), in the [Emails](#) section.

The following tags can be used to customize your email templates.

### Registration Confirmation Email

- `[[number]]` : Registration Number
- `[[event]]` : Event Name
- `[[date]]` : Event Date and Time
- `[[location]]` : Event Location
- `[[seats]]` : Number of seats
- `[[price]]` : Total Amount Paid

### Gift Certificate Email

- `[[number]]` : Order Number
- `[[date]]` : Purchase Date and Time (Pacific)
- `[[price]]` : Total Amount Paid
- `[[url]]` : Download URL of Gift Certificate

### Event Reminder Email

- `[[event]]` : Event Name
- `[[date]]` : Event Date and Time
- `[[location]]` : Event Location
- `[[seats]]` : Number of seats

### Event Thank You Email

- `[[event]]` : Event Name
- `[[date]]` : Event Date and Time
- `[[location]]` : Event Location
- `[[seats]]` : Number of seats
- `[[survey]]` : Url of Survey



# Second Event Image

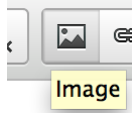
---

## Q: Can I add more than one image for my Event?

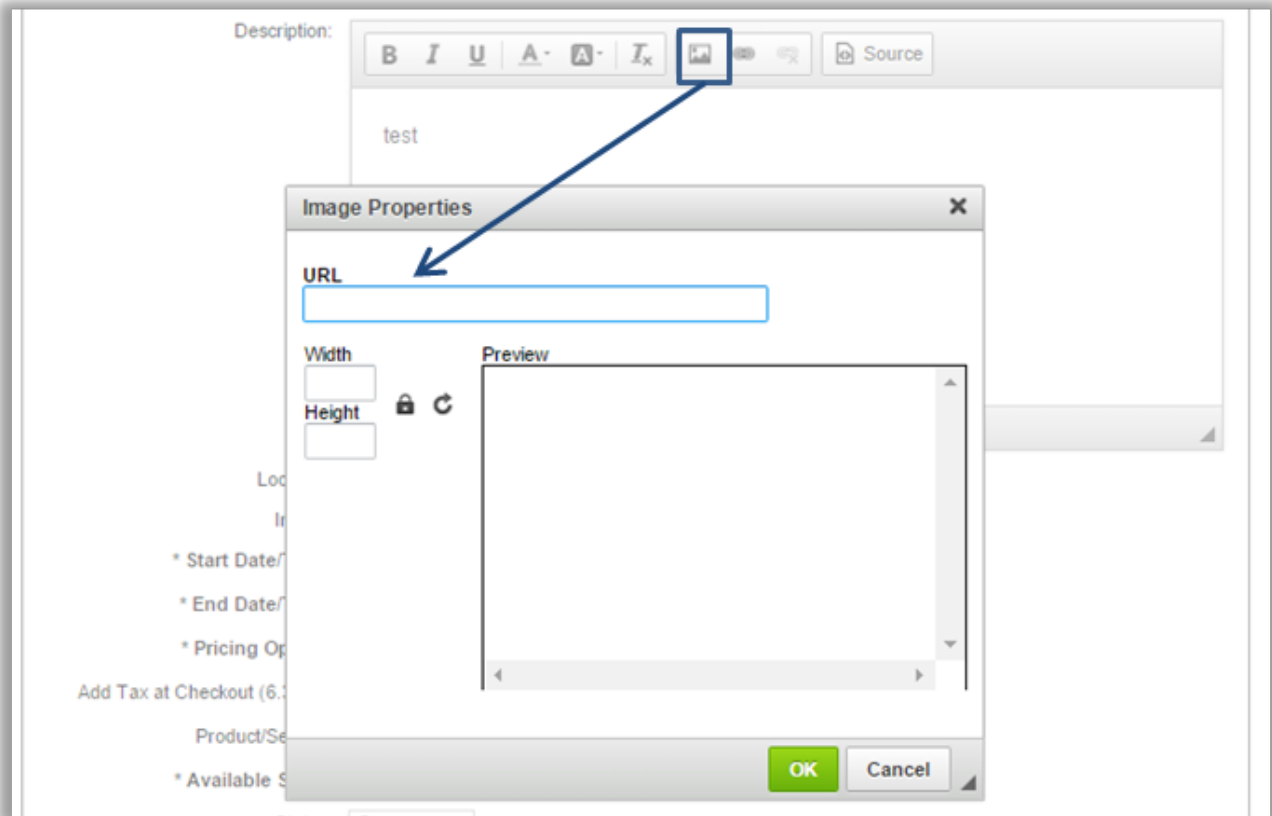
Although there isn't a second Event Image that you can select, the Description field allows you to upload additional images or photos to be part of the Event Description.


To insert an image in the Description:

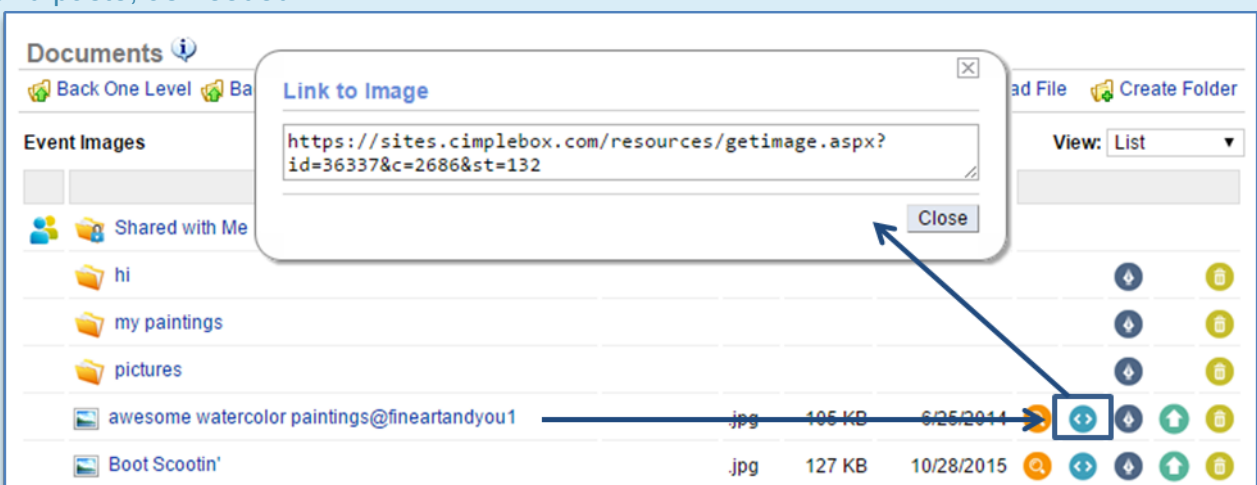
- Edit the Event, and go to the **Description** field.
- Click your mouse to the part where you want to insert the image.
- Click on the Insert Image button on the toolbar.



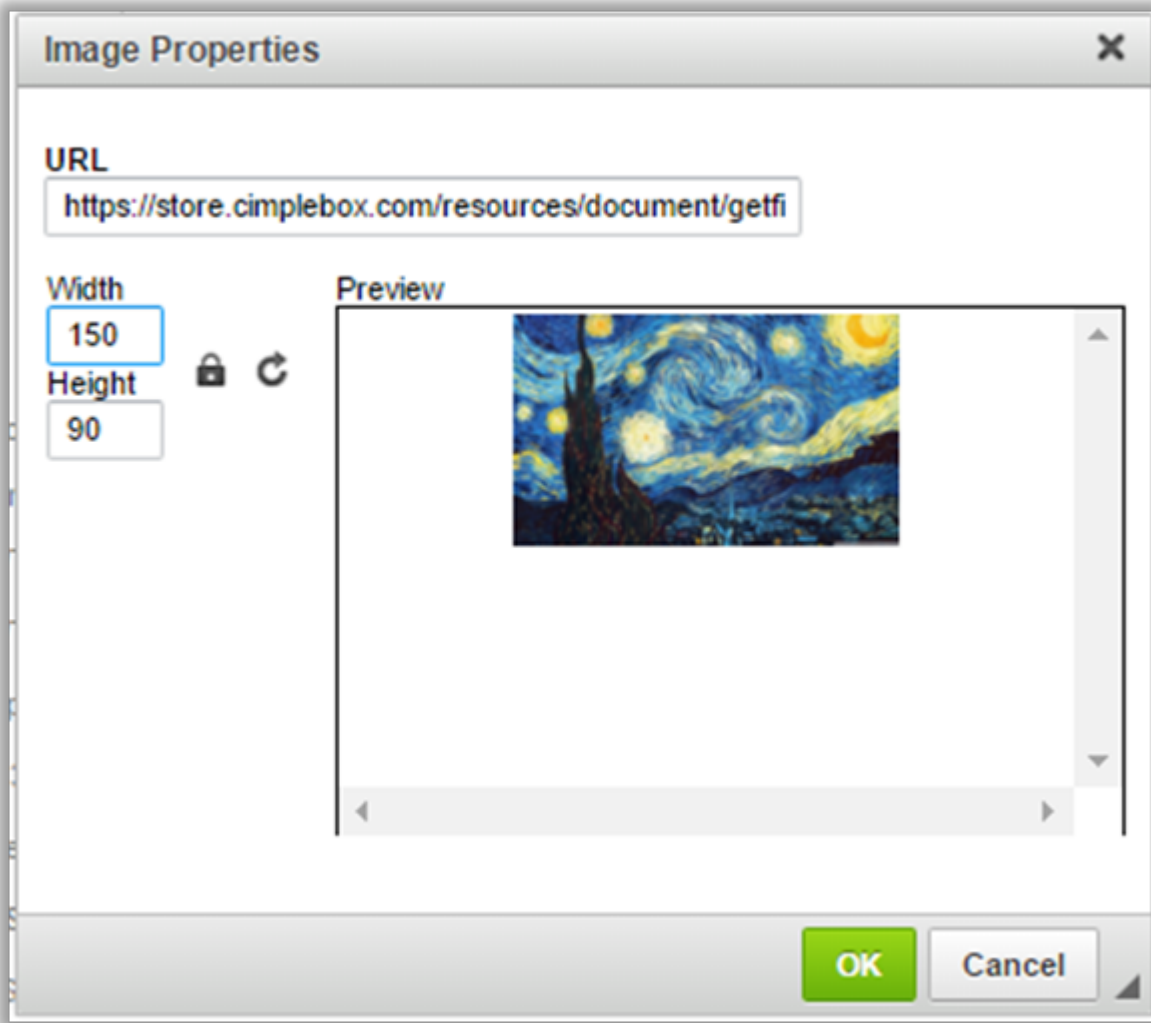
- You will need to enter a **URL** of the image that you would like to add within the URL field of the Image Properties window that appears.



-  You can turn any image into a URL by uploading it to your **Event Images** folder within **Documents**. Once you have uploaded the image, you can click on the <> icon to the right of the image name. This generates a pop up box containing the URL that you can then copy and paste, as needed.



- Once you have the URL, enter it into the URL field as noted above. Once the URL is provided, you can adjust the size of the image and preview it to the right.



- Click **OK** to save your changes. This will insert the uploaded image into your description field.

**i Note**

- There is file size limit of 3MB per image uploaded.

# Payment Processor

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## Q: How do I change the Payment Processor Gateway for my calendar?

We support the following Payment Processors:

- Intuit Merchant Service
- PayPal (Standard or Pro version)
- Authorize.net
- Transnational

Once you have your account set up at any one of these Payment Processors, contact us at [support@cimplebox.com](mailto:support@cimplebox.com), and we'll be happy to guide you through the next steps.

# Event vs Transaction Date

---

**Q: The sales numbers on the dashboard don't seem to match my reports. Also, I have sales numbers in the future; is this correct?**

The numbers are correct, but there are two types of numbers:

- Based on **Event Date**
- Based on **Transaction Date**

Numbers based on **Event Date** means the registration amounts are posted to the day of the event regardless of when the customer paid. For example, if a customer pays for a class on **Jan 31st** for a class taking place on **Feb 14th**, the number will be posted to **Feb 14th** and NOT **Jan 31st**. We use this as the Sales number because this is the accurate way to capture *earned* revenue. The money paid is not considered earned until the service has been rendered. In other words, the money is a form of a “deposit” since they or you may cancel the class and have to refund the money.

One place to see the breakdown of these Event Date sales is [Store > Day-to-Day](#). The mini calendar will show how much each day's revenue is, again based on registrations for that day's events.

Numbers based on **Transaction Date** are how much was collected that day regardless of when the event takes place. We typically don't use these in Sales reports as they are inaccurate measures of sales. But if you'd like to see these numbers, go to [Reports > Events > Registration Report](#). Change the By to Registration Date and run the report. This will give you the money received based on the **Transaction Date**. You can export this report to a spreadsheet by going to [More Options > Export Report](#).

# Using Studio Credit

---

**Q: I gave my customer a studio credit for a class they cancelled. How do they use that for another class registration?**

If you chose to give “Studio Credit” during the cancellation process, it will generate a gift certificate tied to the customer’s account that they can use for any future registration.

To see this gift certificate:

- **Through the Admin Portal**

Go to [Store](#) > [Events](#) > [Accounts](#). Search for the customer and under that account details, their credit will be listed under the Gift Certificate section.

- **By the customer**

If you have Self-Service enabled, your customer can log in directly to their account and view their credit under the Gift Certificate section.



## Related Topics

- [Studio Credits](#)

# Sold Out Message

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**Q: I've sent out invitations from my Waiting List but when they click to the link to register, why do they get a "Sold Out" message?**

When your customer on a **Waiting List** gets an invitation, they are given a link to register for the Event. However, in certain cases they may see a "Sold Out" message if the seat is taken before they are able to register.

This can happen if another person registers prior to the customer with the invitation clicks on the link to register.

A typical scenario includes:

- The Studio directly registering a guest. (View [Registering a Guest](#) for more details.)
- More invitations than the available seats were sent out so the first ones to register will take the available seats.



## Related Topics

- [Waiting List](#)

# Guest Accounts

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## Q: How can I help my Guests login to their Accounts?

To allow your Guests to see their Registration and Gift Certificate history, check the Self Service box in the [Calendar Settings](#) section of the **Event Settings** page.

Once you've enabled Self Service, your Guest will have the option to add a password to create an Account at the end of Registration.

A Guest must enter a password in order to login to the Account. If a password isn't entered, the Account is inactivated, and the guest won't be able to login.

You can set a password manually with your Admin account if a Guest didn't set a password during Registration or has trouble logging in. Setting the password will activate the Account so that your Guest can login.

Go to [Store](#) > [Events](#) > [Accounts](#).

Search for the Guest by first name, last name, or email address, and click the name of the matching Guest from the results.

On the Account Details page that opens, click [More Options](#) > [Change Password](#) to set the password.

Now you can send that password to your Guest, or click the Forgot Password? link on the Guest Login page.



### Related Topics

- [Calendar Settings](#)



# Recognized Sales Total

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## Why are sales reports overstating Recognized Total when a customer uses a promo code?

This problem most commonly caused by creating an internal promotional code with set a value for **Net Amount Received for Selling this Code**. This field is typically used for Groupon type of deals where every coupon actually has proceeds coming from an outside service.

To solve this issue, go to [Store](#) > [Events](#) > [Promotional Codes](#).

On this page, click on your promotional code and change **Amount Received for Selling this Code** to \$0.

# Refunds

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Here are some questions our customers have asked:

- [Studio Credit](#)
- [Refund a Studio Credit](#)

# Studio Credit

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## Q: How do I give a Studio Credit?

From the Event details page, select the registrant to cancel and give a studio credit.

Once the registrant is selected, go to [More Options](#) > [Refund/Cancel](#).

From there you will be given the option to give a “Credit for future event” instead of refunding the money back to the original form of payment. Once the credit is selected, it will generate a gift certificate that can be used by the customer for any future event.

That code can always be found by going to [Events](#) > [Accounts](#) and under the customer, you should see that Gift Certificate listed.

# Refund a Studio Credit

---

**Q: A studio credit was given to a customer, but now they want a refund. Is it possible to convert the gift certificate credit to a credit card refund?**

Once a registration is processed as a “refund” – even as a studio credit – it can’t be processed for another refund.

Here is a recommendation:

Find that gift certificate under [Store](#) > [Events](#) > [Gift Certificate](#) and then delete it by going to [More Options](#) > [Delete Gift Certificate](#).

Now you will have to refund it directly through merchant account.

This would eliminate the outstanding credit (in the form of a Gift Certificate) and give the credit back to the credit card, balancing the accounting side.

# Gift Certificates

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Here are some questions our customers have asked:

- [Purchasing a Gift Certificate](#)
- [Gift Certificate Template](#)
- [Gift Certificate Report](#)
- [Remaining Balance](#)

# Purchasing a Gift Certificate

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## Q: When my customer purchases a gift certificate, what happens after that?

After the customer purchases a gift certificate,

- They will be immediately given the link to download the gift certificate (in the form of a PDF file).
- They will also get an email confirming the purchase with the same link to download the gift certificate.

The gift certificate order will appear on your admin side under [Store](#) > [Events](#) > [Gift Certificate](#) > [Gift Certificate Orders](#)



### Related Topics

- [Gift Certificate Orders](#)
- [Search Gift Certificates](#)

# Gift Certificate Template

---

## **Q: How do I change the Gift Certificate template to match my company's custom template?**

We can take care of the custom Gift Certificate, if you send us a template in an image format (such as .png, .jpg, .gif, etc...)

We ask that it's at least 1250 pixels wide to allow high quality printing when your customers print them.

We also require the following areas to be available on your template, which we will fill out appropriately when the Gift Certificate is generated:

- Recipient Name
- Giver Name
- Amount
- Gift Certificate Code

You can add these OPTIONAL fields, if your studio requires it:

- Created Date
- Expiration Date

You can email that image file to [support@cimplebox.com](mailto:support@cimplebox.com).

# Gift Certificate Report

---

## Q: How do I run a report on how many Gift Certificates I've sold?

The easiest way to look Gift Certificate sales is by running a **Product Mix** report under [Reports](#) > [Product Mix](#).

Under that report, you should see a category called **Gift Certificates** that shows the certificates sold.



### Note

- You can change the date range to run the report for any period desired.



# Remaining Balance

---

**Q: If a Gift Certificate is used to register for a class that costs less than the full value of the Gift Certificate, will the balance remain?**

Yes, the Gift Certificates will always keep the balance and use only the portion necessary.

For example, if a \$40 Gift Certificate was used to register for a class that costs \$30, that same Gift Certificate (with that same code) will now have \$10 remaining for future registrations.

In the case the Gift Certificate does not cover the full price of the class, it will use all the value and then ask the registrant to pay the remaining due amount.

# Employees

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Here are some questions our customers have asked:

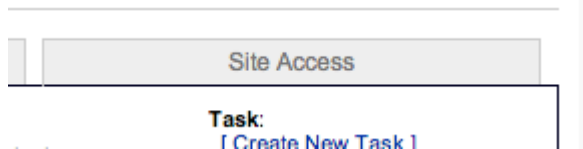
- [Hide Sales Numbers](#)

# Hide Sales Numbers

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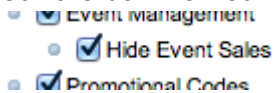
## Q: How do I hide my sales numbers from select employees?

1. Go to **Store > Labor > Employees** and select an employee
2. In the employee profile page, select **More Options > Edit Employee**
3. On the edit page, select the **Site Access** tab



In the the Site Access area,

- Select **Give Access to the Store Management site** checkbox
- Under the **Access** option, select **Limited**
- Once the **Limited** access is selected a series of access options will appear.
- Check the box marked **Hide Event Sales**.



# Discount Codes

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Here are some questions our customers have asked about discounts, which we call Promotional Codes.

- [Groupon/Living Social](#)
- [Update Multiple Codes](#)
- [Limit Discount Codes](#)

# Groupon/Living Social

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**Q: I'm running a Groupon or Living Social type of a deal. How do I upload these codes?**

These type of "Daily Deal" coupons are handled just like any Promotional Code.

Typically these companies (such as Groupon®) will provide you with the set of codes that are sold or will be selling through their site.

Simply follow the directions for creating a Promotional Code and when prompted to enter the codes, copy-and-paste the set of codes in the text box.



## Related Topics

- [Promotional Codes](#)

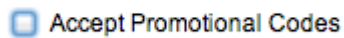
# Limit Promotional Codes

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**Q: I don't want to accept Promotional Codes for classes priced below a certain price. Can I do that?**

A Promotional Code can't be limited by the price of the Event, but each Event has an option to accept Promotional Codes.

Simply **uncheck** the **Accept Promotional Codes** option when creating/editing that event, and your customers will not be able to register using Promotional Codes.



☐ Accept Promotional Codes

# Other Questions

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Here are some questions our customers have asked:

- [Search](#)
- [Low Seat Number](#)
- [Secure website](#)
- [My Password](#)
- [Time Zone](#)

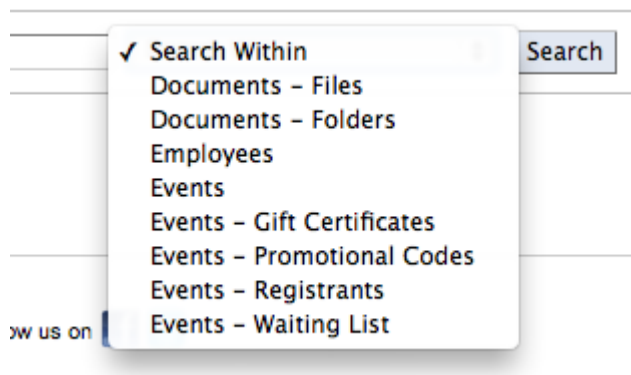
# Search

---

## Q: How do you search for a customer or other items like Gift Certificates or Promotional Codes?

You can perform a search on the system by going to the  **Search** link on the top blue navigation bar.

In the search window, enter the search term (such as the name of a customer) and select where you would like to perform the search in the **Search Within** pull-down menu.





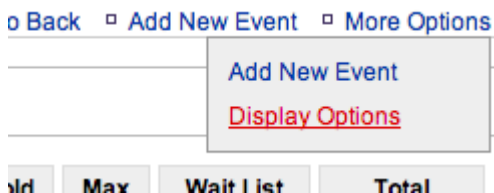
# Low Seat Number

**Q: Is there way to easily find out which of my classes has low enrollment or low remaining seats?**

To see which Events haven't sold enough seats, you can use the [Display Options](#) under [Event Management](#).

To do this, go to [Store](#) > [Events](#) > [Event Management](#).

On this page, click [More Options](#) > [Display Options](#).



You'll see a setting for **Sold Seats** (or **Available Seats**), with a checkbox to **Indicate when number is:**, with a dropdown.

<input checked="" type="checkbox"/>	Sold Seats	<input type="checkbox"/> Indicate when number is: <span>Select</span>
-------------------------------------	------------	---

Once the value is selected, the Event Management page will now indicate your setting with a highlight.

Sold	Max	Total
0	1	\$0.00
3	18	\$90.00
2	21	\$80.00

## Secure website (SSL)

---

**Q: I have the CimpleBox calendar loaded in an iframe, and my customers do not see the “https” to show that the website is secure. Is the transaction still secure?**

Yes, the transaction with the CimpleBox server is secure and is completed through SSL (Secure Socket Layer).

This is an effect of having one domain embedded inside of an iframe of another domain.

When our calendar is inside an iframe on a page on your website, the browser will show your domain on the address bar. If your page (that is loading the CimpleBox calendar) is not secure, the address bar will show `http://yourdomain.com`.

**Please remember that transactions through CimpleBox calendar is still secure.**

In order to show the address bar to show the SSL (https), you will need to get a certificate specifically for your domain. This will allow you to link to your web page such as **https://yourdomain.com**

# My Password

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## Q: How do I change my password?

You can change your password at any time by going to [Settings](#) > [My Settings](#) > [Change Password](#).

# Time Zone

---

## Q: How do I change my time zone?

There are two time zone settings you can set.

### Store time zone

This is the time zone of where store/location is located. You can change the store time zone by going to

**Settings** > **Store Settings** > **General Settings**.

### My time zone

This is the time zone you are currently located. In most cases, this would be the same as the store time zone, but you may have stores/locations that are in other states in a different time zone. You can change your

time zone by going to **Settings** > **My Settings** > **Local Settings**.

# Contact Support

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This manual will provide you with the information you need to manage your account. If you need more help, feel free to contact us, and we'll be happy to assist you.

Also, make sure to check out the [Common Questions](#) topic to see what our customers have asked in the past.

To contact us, [click here](#).