



QR Registration with Photo Upload Option for Graduations

Setting up Your Event

- 1. When creating your event, be sure to enable QR Registration
 - a. If you'd like to give your organization access to view and approve photos and data collected, you will also need to enable Picture Admin
 - b. If you plan to offer your organization a Virtual Celebration Page, you'll need to enable Celebration page
 - c. If you plan to offer a Slideshow Video, you'll need to enable Digital Artwork
 - d. If you plan to allow your client to approve uploaded images, you'll need to enable Picture Admin

Add-On Features
Online Pre-Orders
PhotoMatch
Vouchers
Chroma-Key/Knockout
Face Recognition
🗸 Digital Artwork
Yearbook Functions
✓ Picture Admin
White Glove/HQOE
Retail Image Enhancement
✓ QR Code Registration
✓ Celebration Page
Continue »





Setting up the Registration Prompts

- 1. Click on QR Code Registrations on the left menu
 - a. Click Edit Registration Settings
 - b. Here is where you will determine what data you want to collect and how it is presented to your customer
 - c. Name Address Collection Settings
 - i. Select if you want to collect email and cell only or email, cell and mailing address
 - ii. Select if you want people to be able to edit their name (The edit name function only works with an imported roster)
 - iii. If you only want to collect one person's contact data, you can hide the option to "Add Another Contact" button
 - iv. If you no longer want people to register once your event is online, check the option to "Disable registrations when event is active"
 - d. Name/Address Prompt Overrides
 - i. This allows you to edit the header text your customer sees on the registration page
 - e. Custom Prompts
 - i. You select how many prompts you'd like
 - ii. You then select the prompt type
 - iii. You can set the order you what the prompts to display





What you see in CORE

Note: Team/Group will not be used for Grads unless you use divisions Note: Person Being Photographed will not be used when you import a roster

What your customer will see on the registration page (if you don't import a roster)

Note: Your customer will not see Select Team/Group for Grads unless you utilize division Note: Your customer is only prompted for name when you don't import a roster













Event Link QR Code Registration (One link that all use)

Used when you do not have a roster or don't need to provide unique individual links Note: if someone registers more than once, they will appear in CORE as many times as they register

- 1. After your event and registration page are setup, you will share the event registration link <u>https://regis.viewyour.photos/YOURACCT#/YOUREVENT#</u>
 - a. Make sure to place your Acct# and your Event# in the link before sharing
 - b. Your event registration URL can be shared with your organization so people can begin registering

Placeholder Name QR Code Registration Links (Unique links not yet assigned to names)

Used when you do not have a roster but would like to provide unique links and/or plan to use PhotoMatch with scan cards. Note: Can be used as a graduation name caller card that allows for online registration, so you don't have to manually type data collected.

- 1. After your event and registration page have been setup, you are ready to create your unique registration codes aka placeholder names
- 2. While in the event in CORE click on QR Code Registrations on the left menu
 - a. Click Create QR Codes for New Placeholder Names
 - b. Enter the number of codes you'd like to generate (always generate a few more than you think you'll need so you don't run out at the event)



- c. Click on Names & Contact data on the left menu
 - i. Here you can verify name placeholders with Registration Codes have been created
- 3. If you'd like to print QR Registration/PhotoMatch/Name Caller cards see "Printing Cards" on page 7





Importing a Roster for Unique QR Code Registration Links

Used when you have a roster of names and would like each person to have a unique registration link. This allows you to email participants with their unique registration links.

- 1. Import your roster of names (and emails)
 - a. Go to Names & Contact Data on the left menu
 - b. Click Import names and orders
 - c. Browse for your spreadsheet
 - d. Check file contains headers and continue
 - e. Select the sheet and continue
- 2. Click on QR Code Registrations on the left menu
 - a. Depending on how quickly you get to this page, the QR codes may still be generating (you will see the job still in process if that is the case) When finished, you will see under Status Overview the % of names that have been assigned a Registration Code. When it shows 100% it is finished generating the codes.
- 3. Click on the Event Details on the left menu
 - a. Click to enable the event on retail. Wait for it to finish, then disable the event. This pushes the imported data to the registration website.
- 4. You are now ready to send emails for people to register and optionally upload their image
 - i. Note: the email requires the use of the merge fields \$RegistrationURL\$ to link to their unique registration web page and \$RegistrationQRCode\$ if you'd like to include the QR Code in the email for people to scan.
 - 1. There are templates available to import into your account and edit as you wish
- 5. If you'd like to print QR Registration/PhotoMatch/Name Caller cards see "Printing Cards" on page 7





Printing QR Code Registration/PhotoMatch Cards

These cards will be handed out to those being photographed so they can scan the code, or go to the URL to register and then can be used by the photographer to scan in PhotoMatch

Note: You will need a template setup before you can print your cards. If you need help setting up a template, please email <u>CCSsupport@candid.com</u> or setup a training at <u>https://candid.youcanbook.me</u> or you can view how-to videos here <u>https://drive.google.com/file/d/1dsMUV7YxPS2rwtrsKOBYEYnexatRXkbr/view?usp=sharing</u>

We do have default templates that can be copied into your account if you prefer.

- 1. While in the event in CORE, click on Order on the left menu, then on Queue Print Templates
 - a. Select your printer from the dropdown
 - b. Select your template
 - c. Select your sort order (in most cases, you'll select, Division,Last,First)
 - d. Select Queue profile: Sequence Cards
 - e. Click Queue
 - Note: if your cards are 4 cards on an 8.5x11 page, you can stack sort for easier sorting
 - f. If you wish to stack sort, click on Queues at the top of the page
 - i. Click on Print Jobs
 - ii. Select your Print job, reselect your printer and sort order
 - iii. Check Stack Sort
 - iv. Click Update Jobs
- 2. Open CORE print on the machine you sent the print job to
 - a. Right click on the job in the CORE Print window
 - b. Select printer settings
 - c. In the next window click preferences
 - d. Change the orientation to landscape (assuming you are using horizontal 4 up cards) and click OK
 - e. Click Print
 - f. Right click on the job again and select print entire job (you can optionally select print test, to print one)
 - g. The cards will begin printing on the printer you selected





Importing Registration Data Collected Online

When you finish collecting the registration data, you'll need to import the data into your event. We recommend you set a registration deadline. (Importing the registration data is temporary step, this will be an automated process but for now, follow these instructions.)

- 1. Go into the event in CORE and click on QR Code Registrations on the left menu
 - a. You will see a number to the right of Online Registrations Ready to import if you have registrations ready to import
 - b. Click the Import Registrations button

Status Overview							
Name registrations associate unique registration codes with existing names or new placeholder names. The codes are used when mail-merging name card qrcodes; they link the user to the registration system and later the retail images. Only create as many registration codes as you need. Registration codes are event specific and cannot be deleted.							
Names with Registration Codes 4 of 4 (100%)							
Customer Scanned QR Code Registrations Completed 3 of 5 (60%)							
Online Registration Names Ready to Import 1							
Online Registration Addresses Ready to Import 1							
QRCode Image Scans Ready to Import 0							
Import Registrations							

Once users have registered, you must return here and import their updated name and address data into CORE.

Import Registrations »





Importing Images submitted via the Registration Web Page

Once registration is complete and you've imported your registration data, it's time to import, lock and align images

- 1. Go into the event in CORE and click on Image on the left menu
- 2. Click on alignment categories
 - a. If the registration image folder has not been imported, click import
 - b. Lock Folders



3. Click on Align Images on the left menu

a. Click save changes, mark alignment complete



4. If you elected to mark these images as the default, you may now bulk order Personal Achievement Graphics and/or use these images as reference images for face recognition if you have other images uploaded to this event.





Exporting the Collected Registration Data

You can export your collected data to an excel spreadsheet if you need to share it with the school, review data collected and/or to retrieve answers to questions you plan to use as captions on Personal Achievement Graphics.

- 1. Go into the event in CORE and click on Names & Contact Data on the left menu
 - a. Click Export Name Data to Excel
 - b. All data imported and collected via registration will be exported
 - c. If you are ordering Personal Achievement Graphics, see page 13 for instructions on retrieving and importing captions

I	Offer Setup +	1 Add a new name	TV	T View product caption associations					🍫 Invert marching order					
品	Divisions/Categories	Import names and orders	T E	dit produ	uct captions in bulk			🗑 Dele	ete un-	IDed nan	ies			
<u>R</u> ≡	Names & Contact Data	B Export Name data to Excel	Export Name data to Excel 🔹 Export Name data to Excel (with Email Bounces Only)							Sync				
	QR Code Registrations +	👦 Export Email Opt In data												
Ж	Chroma-Key/Knockout +	Find all records where Name 🔻	ind all records where Name v contains and limit to ALL v Update											
Ð	PhotoMatch +													
	Images +	ZOrder	r <u>PIN</u>	ExtPIN	Name	RegistrationCode		Cancelled Orders	<u>ID</u> Count	Address Count	Division/Team			
٢	Face Recognition	DELETE EDIT ADDRESS ORDER 1	2072		CORE System Account		0	0	0	0	Default Division			
绺	Digital Artwork	DELETE EDIT ADDRESS ORDER 1	2 2073		Sample, Sample	3AKX9RL3	0	0	0	0	Default Division			





Enabling the PictureAdmin.com Site

For your Client access and/or to Download Personal Achievement Graphics once complete

If you would like to give your event coordinator access to view and approve images uploaded and names you can give them access to do so via pictureadmin.com. Note: The event must be active on the retail website in order for the Picture Admin to be active.

- 1. You first must set the person you want to give access to up as a client
 - a. Click on settings at the top of the page, then settings on the left menu
 - b. Click on Client Portal
 - c. Click add a new client
 - d. Here you will enter the organization or school name and Save
 - i. Then you will add a user to your client. This is the person you are granting access to the pictureadmin.com site. Click Add a new client user.
 - ii. Enter the email address of the person and their name, check the Send Notification Email box
 - iii. You may optionally enter a comment. They comment is for your purpose, the client does not see it.
 - iv. Click Save
 - 1. This will send the user an email asking them to create a password, which will allow them to log into the pictureadmin.com site
 - 2. You now must assign the client to your event, before they will have access to the event

	Notifications 6	+ Edit client				_
	Settings	- <u>« Return to clients list</u>				
ß	General Settings	Client Settings				
8	Candid Accounts	ABC High School				
뿅	User Setup					
88	Custom Fields	Save Settings				
	Payments	Client Users				
Ø	Seasons	Add a new client user				
888	Manage View Names	Email	First Name	e Last Name	Account Status	
ø	QEMS Settings	edit kimk@candid.com	Kim	Kelley	04/15/2020 9:02PM	
≜	Event Defaults	edit sarah.burns@candid.co	om Sarah	Burns	07/07/2017 1:28PM	
*	Client Portal	Copyright © 2002-2020 Candid Colo /CORE/Setup/Clients/Edit.aspx?Partr				
<mark>گ</mark>	Workflows					





- 2. Go back into your event
 - a. On the left menu click Picture Admin (if you don't see it, click Add-On Features and check it, then go back to the left menu by clicking on Event Details)
 - b. Locate the "Client Portal" section
 - i. From the dropdown select the client you want to grant access to this event
 - c. If you don't have images on the event yet, you will only see these options

Client Portal
Clients: CCP V
Enable yearbook pose review
Enable browse and download of PR images
Enable browse and download of all images

- i. Enable yearbook pose review will allow your client to view, change and approve photos, names, grades and any data collected on the registration site
- ii. Download of PR images allows your client to only download images you have IDd in CORE as PR
- iii. Download of all images allows you or your client to download any or all images
 - 1. This is where you can download Personal Achievement Graphics once complete
- d. Once you have images on the event and they have been IDd you will have additional options

lient Portal		
	-1	
	Clients:	CCS School •
		Enable yearbook pose review
		Enable browse and download of PR images
		Enable browse and download of all images
		Enable browse and download by grade/category
		Enable Roster Export

- i. Download by grade/category allows the client to download images by grade or division
- ii. Roster export allows the client to export a PDF that contains images, names, grade, division (this is used primarily in elementary schools for field trips, etc.)
- 3. You event must be active on the retail website in order for your client to access the images on the Picture Admin.
- 4. If you make any changes to names or IDs in CORE, you will need to resync the event in order for those changes to be seen on the Picture Admin site.





Ordering Personal Achievement Graphics (PAG)

Before you can order the Personal Achievement Graphics you must add them to the offer you have assigned to your event. You can import the products by going to your offer page and clicking to import official CCS Offers and look for the offer named Personal Achievement Graphics. You can then copy the product you like into your offer. The product codes are PAG for Personal Achievement Graphic with image and NPAG for Personal Achievement Graphic with NO image. You'll need to setup both if you plan to offer graphics to those who don't have an image.

- 1. Go into your event and click on Offer Setup
 - a. Confirm that you have entered your schools logo, selected a swatch color and entered captions that will be the same for all graduates
 - i. Example: Year & School Name will be the same for all, so go ahead and type in those captions
 - ii. The remaining captions that will be unique to each graduate will either have been imported when you originally imported your roster or will be collected and imported using the data collected on the registration site.
- 2. If you collected information on the registration site that you plan to use as captions on the personal achievement graphics, you'll need to export your name data and import the data into the Captions.
 - a. Go into your event and go to names and contact data
 - b. Click Export Name Data to Excel

Ξ	Offer Setup	+	1 Add a new name		T View product caption associations						♣ Invert marching order				
ሔ	Divisions/Categories		Timport names and orders		Edit product captions in bulk						Delete un-IDed names				
<u>R</u> ≡	Names & Contact Data		BEXPORT Name data to Excel		Export Name data to Excel (with Email Bounces Only)					🍫 PhotoMatch Names Sync					
	QR Code Registrations	+	🕞 Export Email Opt In data	Export Email Opt In data											
*	Chroma-Key/Knockout	+	Find all records where Name	nd all records where Name v contains and limit to ALL v Update											
Ð	PhotoMatch	+													
e	Images	+		<u>ZOrder</u>	<u>PIN</u>	<u>ExtPIN</u>	Name	<u>RegistrationCode</u>		Cancelled Orders	<u>ID</u> Count	Address Count	Division/Team		
3	Face Recognition		DELETE EDIT ADDRESS ORDER 1	1	2072		CORE System Account		0	0	0	0	Default Division		
绺	Digital Artwork		DELETE EDIT ADDRESS ORDER 1	2	2073		Sample, Sample	3AKX9RL3	0	0	0	0	Default Division		





- c. Open the spreadsheet
 - i. You only want to keep these columns, NameID, FirstName, LastName and the columns that contain caption data. Delete all other columns.
 - ii. Change the headers for the columns with data you plan to use for captions.
 - iii. Your spreadsheet headers will look like this:

	A	В	С	D	E	F	G	н	I	J	К	L	М	N
1	NameID	FirstName	LastName	CFirst Name	CLast Name	CNameID	CParticipant Name	CSchool of Degree	CMajor	CDegree	CQuote	CTitle Line 1	CTitle Line 2	CTitle Line 3
2														
3														
<i>(</i> D	Depending on the style of Personal Achievement Granhic, you may not need all these cantions)													

- iv. Once your spreadsheet is edited, click on Import Names and Orders to reimport your spreadsheet, on the final screen select Edit
- 3. Now it's time to order your Personal Achievement Graphics
 - a. Click on Order > Bulk on the left menu
 - b. Select Personal Achievement Graphic and continue
 - i. Enter the email of the person to be notified when the graphics are completed
 - ii. Choose a package for names with an image
 - 1. You can order with a voice announcement of the name or without
 - 2. Note: if you plan or order a slideshow video of your PAGs, your slideshow will use whichever style of slides you order here, so if you want names to be announced in the slideshow, you must order PAGs with voice here. If you order with no voice, the slideshow you order later will not have voice either
 - iii. Choose a package for name without an image (must pick the same style as you do for with image)
 - iv. If you plan to offer the Personal Achievement Graphic on the retail site to sell products such as yard signs, prints and plaques using the PAG image, you will need to select a restriction that matches the restriction of the packages you plan to offer
 - 1. The reason for a restriction is to prevent someone from ordering the PAG image on a product that will not work properly for the aspect ratio of the PAG
 - v. Choose all or a specific division
 - vi. Select or enter a name and click continue
 - vii. Click on orders at the top of the page
 - 1. Click on transmit orders on the left menu
 - a. Select do not batch
 - b. Return in box
 - c. Select order
 - d. Click transmit
 - e. Click back on transmit orders on the left and confirm the order transmits without stalling
- 4. When the PAGs are completed, you'll need to enable the event on the retail website if you plan to use the Celebration Page or plan to offer the graphics online to be ordered as products





Personal Achievement Graphics (PAG) Slideshow Video

Web page for hosting the Personal Achievement Graphics and up to 3 videos. This page can be customized and branded to your school. Before you proceed with ordering your PAG Slideshow, you must first order and have completed PAG slides

- 1. Once your slides are complete you can order your Slideshow Video
 - a. Reminder, your slide show will only have a voice reading the names if you ordered PAGs with voice
- 2. Go into your event in CORE and click on Digital Artwork on the left Menu
 - a. Enter the email to be notified when the slideshow is complete
 - b. Select Slide Show
 - c. Product Restriction: None
 - d. Artwork Style: Generic Intro and Outro
 - e. Category: All Categories, One Artwork (unless your grads are in division and you want separate videos per division)
 - f. Folder: CCSPAG
 - g. Music: select with or without music (music is Pomp & Circumstance)
 - h. Image Filters: All (if you only selected the CCSPAG folder)
 - i. Image Sort Order: Most will select Alpha by LastName, FirstName, Folder, Image
 - j. If you want to custom sort your images you can by changing the sequence numbers on the images
 - k. Check all images (you can uncheck images as needed)
 - I. Enter your Captions and Crest and Colors
 - m. Queue Order for Transmit
 - n. You'll receive an email when the slideshow is complete

Order Digital	Artwork d Pag with Visice Test (27094690)						•
Freed Address	support@candid.com	0					
Artwork type:		. 0					
Product restrictions	hane						
Arturorik style:	Generic Intro and Outro	• 0					
Cathegorys	All Categories. One Artwork						
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Strage Filters:	Lashiarre FirstName Folder Image	:					
	Enter Sequence Images are to be displayed on the Invent to organize my images using the organizer Queue Order for Transmit to Lab	e artwork					
P Check all images	II Hide unchecked images						
All Division:	5						
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Celebration Web Page

Web page for hosting the Personal Achievement Graphics and up to 3 videos. This page can be customized and branded to your school.

- 1. Go into your event in CORE
- 2. Click on Celebration Settings on the left menu
- 3. Under HTML settings you can enter your custom HTML to brand this page, just like you can with your retail web page
 - a. You can link a jpg or png header or just use text with your school name
 - b. You can include a header, body top and body bottom (footer)

HTML Settings	
HTML F	leader: <title>University of Oklahoma</title>
HTML Boo	ty Top: <div class="container"> </div>
HTML Body B	Nottom: Copyright 2020





- 4. Under Video Links you can link up to 3 videos that are hosted on other sites such as YouTube, Vimeo, etc.
 - a. To link the video you will need the embed link (not the direct link to the video)
 - i. Example on YouTube, you click share > select embed, then copy the link from the embed video info



5. If did you not restrict your PAGs when you ordered them, but not need to now because you are offering the PAGs for sale on the retail site, you can do so by selecting the restriction and clicking bulk ID CCSPAG

uto ID CCSPAG Images based on NameID
When bulk ordering PAG and NPAG images, CORE automatically IDs the CCSPAG roll to the frame named the same as the NameID. f you happen to unlock rolls, you may need to re-ID the CCSPAG roll to Names based on the frame name. choose a package restriction (optional): None
Bulk ID CCSPAG





- 6. You can review the Celebration Page by clicking the link at the top of Celebration Settings page
 - a. This is also the link that can be shared with your school and students



Example of a Celebration Page

