Candid Color Systems ®

CORE

QUICK START GUIDE

EVENT SETUP

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CORE is Candid Color Systems most extensive and powerful software tool to manage and market event images. CORE allows you to identify images to individual names and/or groups and market to your customer using personalized emails and/or sms text messages.

Event Setup

The following instructions will guide you through an event setup.

1. Click on Events on the top menu in CORE.

2. On the left menu select Graduation or School or Sport

    a. This narrows down the features and products to that specific type of event

        i. If not a graduation or school portraits, select sport for all other types of events (even if not a sport event)

3. Click "Create New Event"
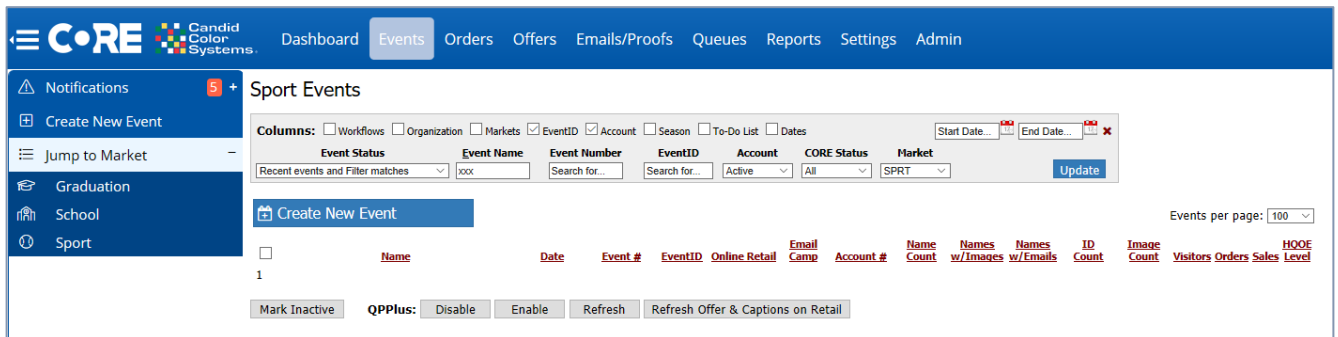
4. Select Your Acct #

    a. Select the market type: Grad, School or Sport (if no a grad or school, select sport)

    b. Select Event Type: CORE (you will only see this option when in Sport Market)

    c. Select your workflow

        i. You will notice the add-on features are automatically selected or deselected based on your workflow settings.

            1. At this point you can select or deselect any add-ons

    d. Enter Your Event Name – Remember your customer will see this name, so we don't recommend abbreviations. If you allow customer to search for events, the full name and year in the event name are helpful.

    e. Event Date: enter the date of the event

    f. Event Deadline: enter the deadline date that will appear on the website (people can still order after the deadline)

    g. Late Fee Date: enter the date you want to start charging a late fee. This date needs to be at minimum one date after your deadline date.

    h. Email Campaign will be preselected based on the settings in your Workflow, this can be changed after the event is setup if necessary

    i. Offer: will default the offer you set on the Workflow. You can change it here or after the event is setup.

    j. Zip Code: this is the zip code of the event location

k. Click Continue to setup the event

l. You will now be within the Event Details of the event you just created

Offer Setup

Your "offer" is the set of products you are offering your customer. When you select your product offer for the event, you'll also be prompted to enter any captions and logos you'd like used when producing those products.

1.   While in your event, click on Offer Setup on the left menu
   a.   Here you will enter text/captions/logos for all prompts that will be the same for everyone photographed, such as, date or league name.
      i.   Note: The prompts you see here are determined by the products you have in your product offering.
   b.   If you are importing a roster, you'll be able to import custom text/captions when you import your roster.   If you are not importing a roster and doing a View First event, your customer will be prompted for these captions when they place an order.
   c.   After entering captions and logos click Save Changes

Setting up your Divisions/Teams/Groups

When you get your list of teams/groups it won't likely be in a format ready to import without editing the column header and the way the teams/groups are listed. If you only have a few teams, it may be easier for you to key them directly into CORE. If you prefer to key them, skip to "entering divisions directly into CORE".

The division is a team or group. The division is how people are "grouped" together and how you will identify group photos and what group photo a person belongs to. Each person's name will be associated with a "division". It is extremely important that subject/parents know what "division" they or their child belongs to. Making divisions names descriptive is important. Also, all division names must be unique. You can't have two divisions with the same name.

Divisions = Team or Group

In your spreadsheet have a column titled "division" each team or group you'll be photographing needs to be listed in that column. This is how CORE knows what group photo a person belongs to. Division names are not placed on products so you can be descriptive with your division names. Example: if photographing a sports league you may want to enter divisions like this

12u-Colts-Coach Smith or Colts-Coach Smith

12u-Broncos-Coach Jones or Broncos-Coach Jones

10u-Colts-Coach Wilson or Colts-Coach Wilson

10u-Phillies-Coach Matthews or Phillies-Coach Matthews

Parents are more likely to select the correct team/group when the division is more descriptive rather than just having Team Names, since there could be more than one team with the same name. Same is true when photographing schools. Use the grade and teacher name for the division like this

PreKAM-Mrs. Smith

PreKPM-Mrs. Smith

KAM-Ms. Jackson

KPM-Ms. Jackson

1st-Mr. Wilson

1st-Mrs. Matthews

Importing your Divisions/Teams/Groups

Once you have your spreadsheet formatted properly, you can import your list of teams/groups.

1. While in the event, click on Divisions/Categories on the left menu

    i. Click the **Import Division and Folder/Image Name** link.

    ii. Click the Choose File button and locate your spreadsheet

        b. Select if your spreadsheet is an Excel (XLS, XLSX) or Comma Separated (CSV) file

        c. Check Table contains field headers and continue

        d. Confirm Divisions | Division is selected from the dropdowns and click continue

            i. Click Continue

            ii. It will tell you the number of divisions you imported

            iii. Click on Divisions/Categories on the left menu

2. Setting your style "Modifier" for each division

    a. If all teams are going to use the same style modifier click the Edit/Add Divisions button

        i. Click the Bulk Update Modifiers button

        ii. Select your modifier style and save changes

Manually entering your Divisions/Teams/Groups

If you just have a few teams/groups to enter, it may be faster to just key the teams/groups directly into CORE.

1. While in the event click on Divisions/Categories on the left menu

   a. Click the Edit/Add Divisions button

   b. Type your team/group name in the box. You may optionally select a modifier at this time. The modifier is the sport style design you will use for this team's products, such as memory mates, trader cards, etc.

   c. After entering the name, click Add New Division

      i. Each team can have a different modifier as long as your product offering supports it

      ii. If all divisions are going to use the same modifier you can wait until you've entered all your divisions and then select Bulk Update Modifiers and Save

1. Click on Event Details on the left menu

    a. Under Quick Links, click Event Settings

    b. Scroll down to Proof Card Settings

        i. Confirm your Email Campaign is selected

        ii. Next to email campaign start date: Enter the event date

        iii. Save Changes

        iv. Click back on Event Details on the left menu

Note: Depending on your workflow, there may be additional steps.   Please refer to the guides that specifically outline your event workflow for full event setup details.