SimuLive User Guide

Getting Started with Runbooks for Webinars & Meetings

1. Getting Started

Before creating runbooks for your automated webinars and meetings, you need to connect your Zoom and Google Drive accounts. These integrations allow SimuLive to create and manage your webinars and meetings automatically.

Connect Your Zoom Account

Link your Zoom account to enable SimuLive to create and run automated webinars and meetings on your behalf.

1. Go to **Dashboard** → **Integrations**.
2. Click **Connect Zoom**.
3. Allow SimuLive access on the Zoom screen.
4. You'll see **Active** status when connected.

Connect Your Google Drive

Link your Google Drive to store and access video content, chat messages, and participant configurations for your webinars and meetings.

1. Go to **Dashboard** → **Integrations**.
2. Click **Connect Google Drive**.
3. Allow SimuLive access on the Google screen.
4. You'll see **Active** status when connected.

2. Creating a Runbook

A runbook is your automated webinar or meeting configuration. It contains all the settings needed to run your event automatically, including video content, chat simulation, and participant settings. Creating a runbook has two steps: Config and Details.

Step 1: Config

Configure the technical settings for your webinar or meeting, including which accounts and content to use.

1. Go to **Dashboard** → **Runbooks** and click **Create Runbook**.

2. Click to select your **Subscription** from the list.

3. Click to select your **Zoom Account** from the list.

4. Click to select your **Google Drive Account** from the list.

5. Your content folders will appear in the **Google Drive Tab**. Expand and select a folder containing your webinar or meeting assets.

6. If you don't have content yet, go to the **Upload Files Tab**.

7. Click **Next** to continue.

Uploading Files

Prepare your webinar or meeting content files. Need sample files? Click the download links at the top of the Config section to get **messages.json** and **participant-names.json** templates.

Subscription	Files You Need
Silver	Video file (.mp4)
Gold / Platinum	Video file (.mp4) + messages.json + participant-names.json

Drag and drop your files into the **Upload Files Tab**. After upload, your new folder will appear in the Google Drive Tab ready for your webinar or meeting.

Step 2: Details

Set up the scheduling and event details for your webinar or meeting.

1. Enter a **Title** for your webinar or meeting runbook.

2. Enter a **Description** (this will be the webinar or meeting agenda).

3. Select **Event Type**: Meeting or Webinar.

4. Set the **Date**, **Time**, and **Timezone** for your webinar or meeting.

5. Select **Duration** (based on your subscription credits).

6. Choose **Schedule Type**: Scheduled, Recurring (with fixed times), or Recurring (without fixed times).

7. Click **Create Runbook**.

■ Note: Schedule time must be at least 10 minutes in the future for both webinars and meetings.

3. Adding Live Stream

Extend your webinar or meeting reach by broadcasting to external platforms. After creating a runbook, you can schedule a live stream to share your content with a wider audience.

1. Open your webinar or meeting runbook.
2. Click **Schedule Live Stream**.
3. Set the schedule time (must be within +1/-1 of your webinar or meeting runbook time).
4. Save your live stream schedule.

4. When Your Runbook Runs

At your scheduled time, SimuLive automatically handles everything for your webinar or meeting. No manual intervention is required.

At your scheduled time, everything starts automatically:

• Your Zoom Webinar or Meeting goes live

• Live streaming begins (if scheduled)

• Chat simulation starts for your webinar or meeting (Gold/Platinum)

• Participant simulation starts for your webinar or meeting (Gold/Platinum)

You can **Abort** a running webinar or meeting runbook at any time if needed.

5. Editing a Runbook

Update your webinar or meeting settings, schedule, or content at any time before the event runs.

1. Go to **Dashboard** → **Runbooks**.
2. Click on the webinar or meeting runbook you want to edit.
3. Click **Edit**.
4. Make your changes and save.

■■ Note: You cannot edit a webinar or meeting runbook while it's running.

6. Deleting a Runbook

Remove webinar or meeting runbooks you no longer need. You have several options depending on whether you want to keep the associated Zoom event.

1. Go to **Dashboard** → **Runbooks**.
2. Click on the webinar or meeting runbook you want to delete.
3. Click **Delete**.
4. Choose your deletion option:

Option	What Happens
Delete Runbook Only	Removes from SimuLive, keeps Zoom webinar or meeting
Delete with Zoom Meeting	Removes runbook AND the Zoom webinar or meeting
Delete Current Occurrence	For recurring webinars/meetings: removes only this one
Delete All Occurrences	For recurring webinars/meetings: removes the entire series

7. Disconnecting Accounts

Remove linked accounts if you need to switch to different Zoom or Google Drive accounts for your webinars and meetings.

• Go to **Dashboard** → **Integrations**

• Click **Disconnect** next to the account

• Confirm when prompted

8. Deleting Your Account

Permanently remove your SimuLive account and all associated webinar and meeting data.

• Go to **Dashboard** → **Settings** → **Delete Account**

• Your account will be deactivated immediately

• Permanent deletion completes within 30 days

Need help with your webinars or meetings? Contact us at **support@simulive.us**

7. Managing Registrants

SimuLive allows you to bulk-register participants for registration-enabled Meetings and Webinars by uploading a spreadsheet file. On your first file upload, SimuLive automatically starts registering participants with Zoom. For any subsequent changes to the registrant file, you need to click the Sync button to process updates.

Prerequisites

Before managing registrants, ensure the following:

- Your Runbook must have **Registration Enabled** (set during Runbook creation in the Details step).
- Your **Google Drive** account must be connected (registrant files are stored in Google Drive).
- Your Runbook must not be in a completed, aborted, or deleted state.

Preparing Your Registrants File

Prepare a spreadsheet file with your registrant data. Supported formats: .csv, .xlsx, and .json.

Your file must include the following columns:

Column	Required	Description
email	Yes	Registrant email address
first_name	Yes	Registrant first name
last_name	No	Registrant last name

First Upload (Auto-Registration)

When you upload a registrant file for the first time, SimuLive automatically begins registering all participants with Zoom. No additional action is required.

1. Go to **Dashboard** → **Runbooks**.
2. Find a Runbook that has **Registration Enabled**.
3. Click the **Registrants icon** (Users icon) on the Runbook row.
4. Drag and drop your .csv, .json, or .xlsx file into the upload area, or click to browse.
5. The file is validated, uploaded to Google Drive, and converted to a Google Sheet.
6. Registration starts automatically — all rows are processed and registered with Zoom.

Syncing After Changes

After the initial upload, any changes you make to the registrant spreadsheet are not processed automatically. You must click the Sync button to apply updates to Zoom.

1. Click **View & Edit in Google Sheets** to open the spreadsheet directly.
2. Add new rows or update existing registrant data in the spreadsheet.
3. To re-register an existing record, set its **Status column** to **init** in the spreadsheet.
4. Return to SimuLive and click the **Sync** button to process new and updated rows.
5. Previously processed rows are automatically skipped.

■ Note: Only new rows and rows with Status set to "init" are processed during Sync. All other rows are skipped.

Status Column Operations

Use the Status column to control what happens to each registrant row during Sync:

Operation	Status Value	Description
Register	init or blank	Leave blank or set to init to register on next Sync.
Update	update	Update an existing registrant's details on next Sync.
Remove	remove	Cancel and delete an existing registrant on next Sync.
Skip	success / duplicate / failed / skipped	Rows are skipped. Set back to init to re-process.

Registration Progress

The progress tracker shows the following stats in real time during both auto-registration and manual Sync:

Status	Meaning
Total	Total number of registrant rows in the spreadsheet
Registered	Successfully registered with Zoom
Waiting	Pending processing
Failed	Registration failed (invalid data or Zoom error)
Duplicate	Already registered with Zoom

File Management

Additional actions available in the registration modal:

- **Copy URL** Copy the Google Sheet link to share or bookmark.
- **Refresh** Reload file information and registration stats.
- **Delete** Remove the registrant file and start over. A new upload will trigger auto-registration again.