User guide

Ticket Sales and Attendee Management

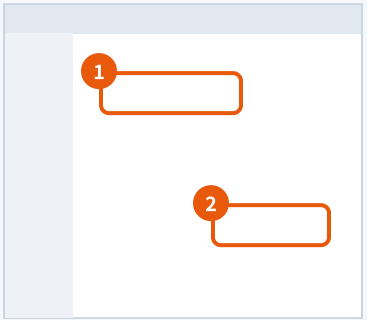
From annual passes, payout accounts, sales and refunds to bulk attendee registration and admission records, this guide follows real screenshots step by step.

The screenshots were taken with sample data.

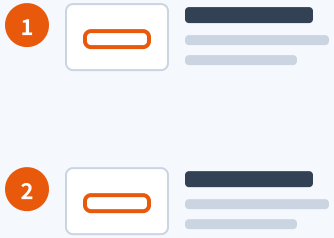
How to read this guide

- Open each screen after choosing the conference in the organizer dashboard.
- The numbered boxes on each screenshot show where to press or type. Read them together with the explanation of the same number in the right-hand column.
- For step-by-step detail, see the web guide, which walks through the real screens.

What a page looks like



A photo of the screen. The numbered boxes show where to press.



The row with the same number shows a close-up of that place and what it does.

Who can use it

- Conference organizers can use these features.

What this guide covers

1 Ticket Sales and Refunds

Annual pass
Payout account
Sales (amounts received and payouts)
Refund

2 Registering Attendees and Admission

Bulk registration of participants
Venue attendee list

3 Your Contract as an Organizer

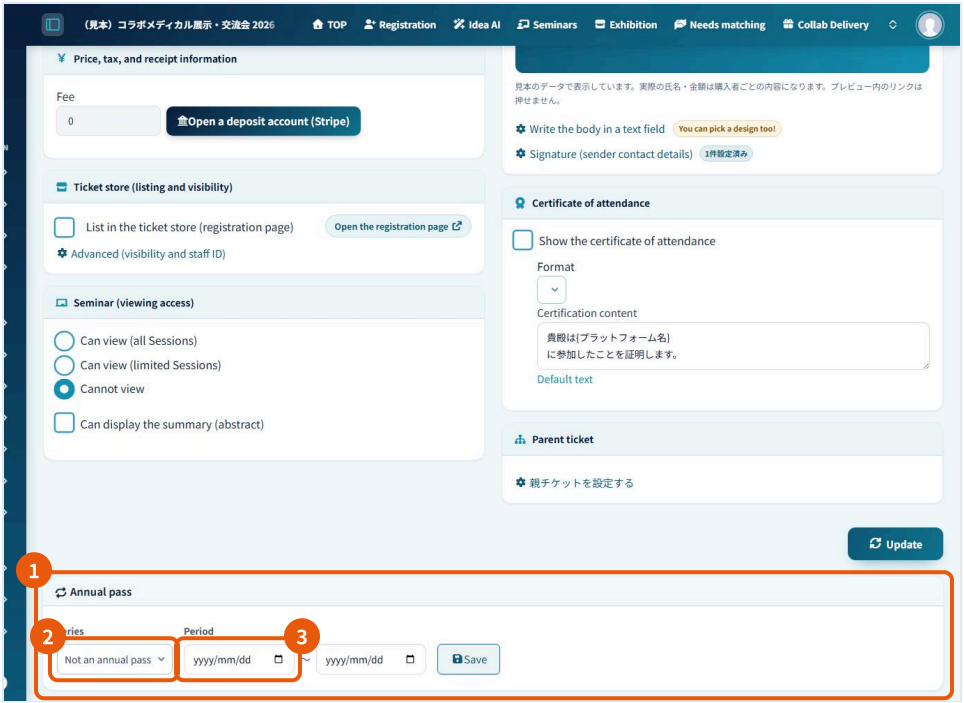
Contract and payments (your contract as an organizer)

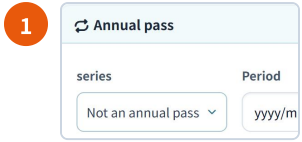
1

Ticket Sales and Refunds

4 screens

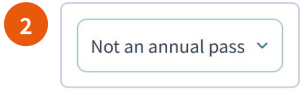
Annual pass





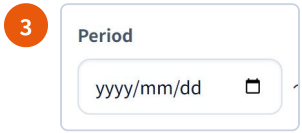
Annual pass

Shown when the conference has a series.



Series

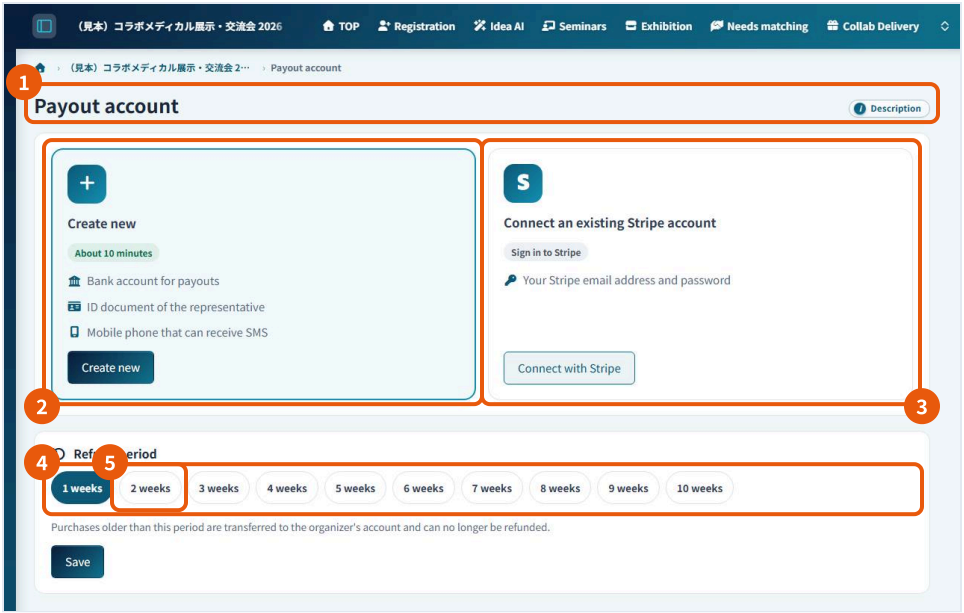
Choose which series the pass covers. "Not an annual pass" turns it off.



Period

Every session held in this period (or opened, for recordings) can be viewed.

Payout account



1 **Payout account**

Payout account

Account setup, refund period and payout records are on one page.

2 **Create new**
About 10 minutes

Create a new one

About 10 minutes. Have the bank account, the representative's ID and a phone that can receive SMS ready.

3 **Connect an existing Stripe acc**
Sign in to Stripe

Connect an existing Stripe account

Sign in to Stripe and use your current account as this conference's payout account.

4 **1 weeks** 2 weeks 3 weeks

Refund period

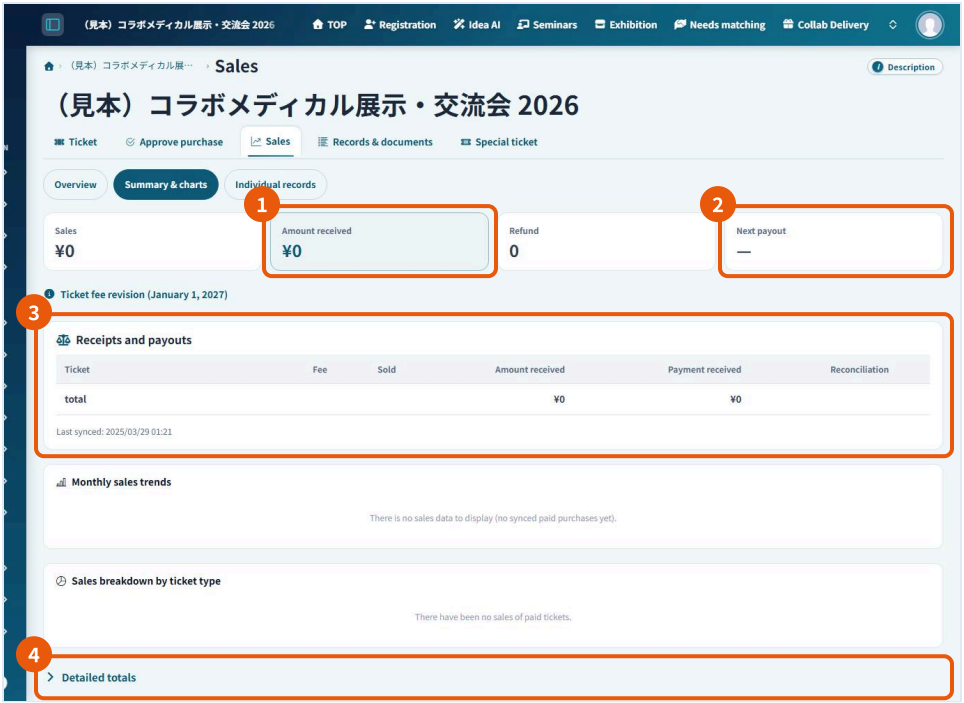
Once this period after purchase has passed, the sale is transferred to the organizer's account and can no longer be refunded.

5 **2 weeks**

Choose the period

Press to choose, then press "Save".

Sales (amounts received and payouts)



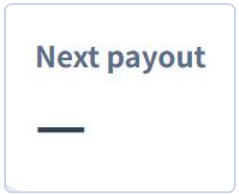
1



Amount received

Sales minus the fee: the amount that goes to your account.

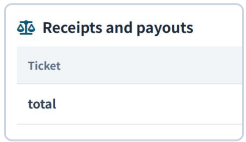
2



Next payout

The amount and date of the next transfer.

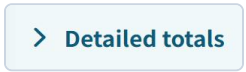
3



Receipts and payouts

For each ticket, the amount received and paid out are compared as "Matches", "Waiting" or "Short". "Details" shows each purchase.

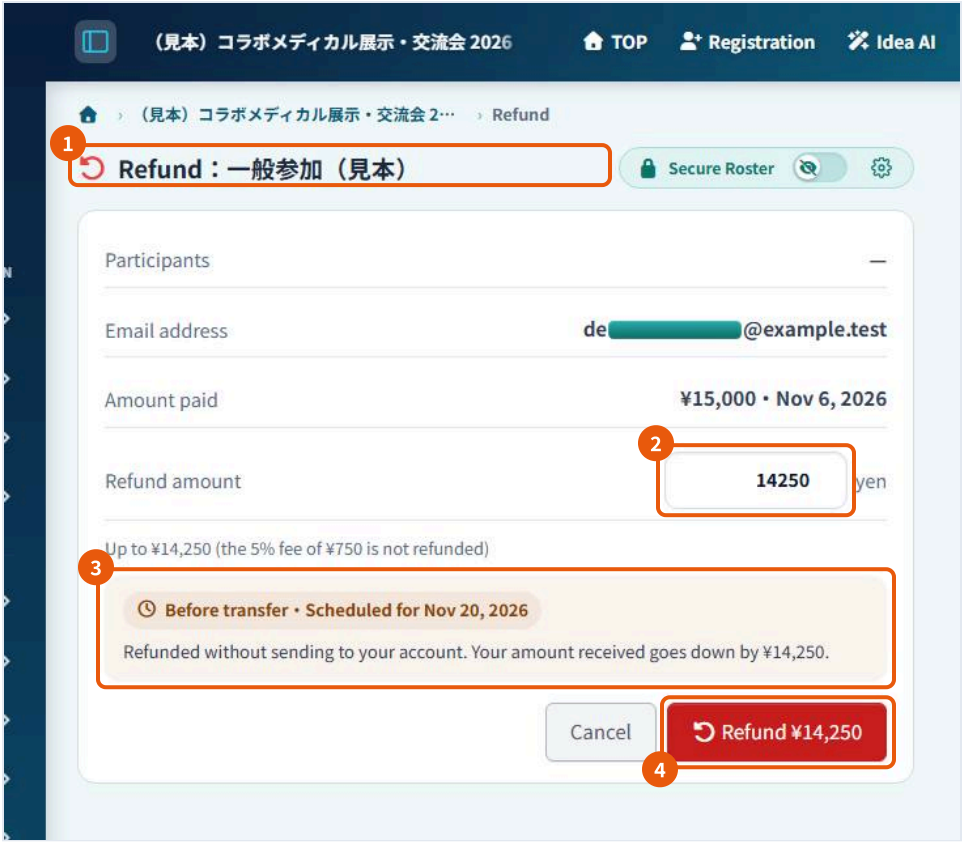
4



Detailed totals

The detailed table, including participant counts, is folded here.

Refund



1 Refund：一般参加（見本）

Ticket to refund
Check which registration you are refunding.

2 14250 y

Refund amount
95% of the amount paid is filled in. You can lower it.

3 Before transfer・Scheduled for No
Refunded without sending to your accou

Before or after the transfer
Before the transfer, the refund is made without sending to your account. After it, the amount sent is taken back first.

4 Refund ¥14,250

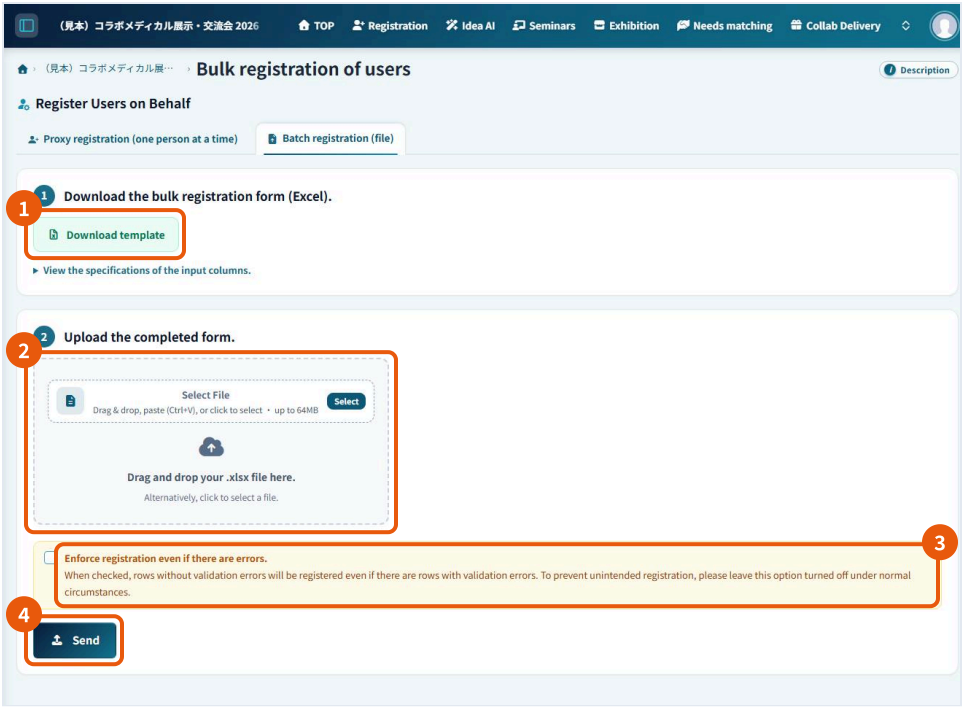
Refund
A confirmation appears. A refund cannot be undone.

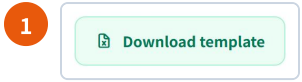
2

Registering Attendees and Admission

2 screens

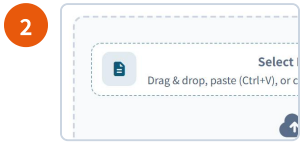
Bulk registration of participants





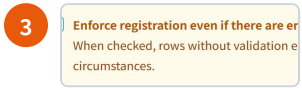
Download the template

First, enter the participants in this Excel template.



Choose a file

Put the completed .xlsx file here.



Force registration even with errors

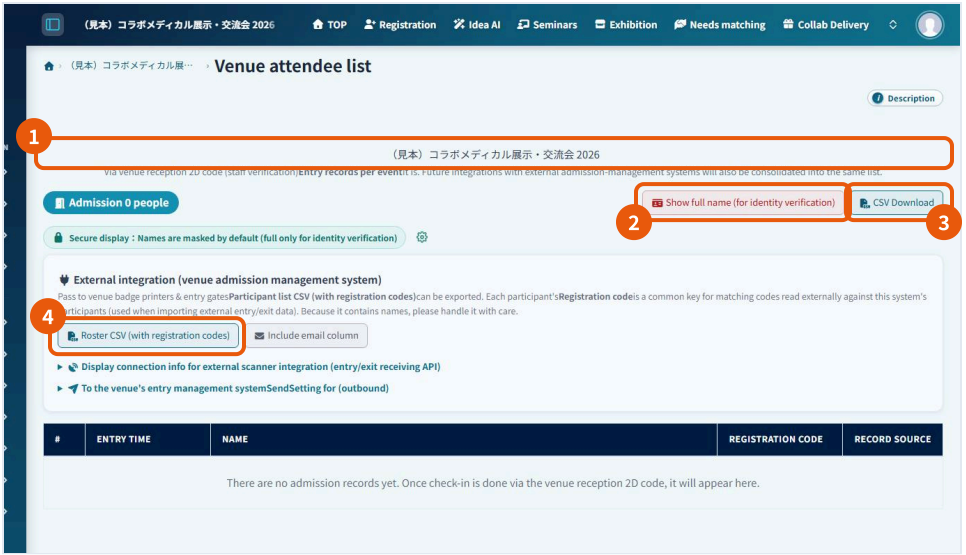
When on, only rows without errors are registered. Normally leave it off.



Submit

Press it to start registration. The results appear in the list below.

Venue attendee list



1 （見本）コラボメディカル展示・交

Venue entry list
These are the entry records for this conference.

2 Show full name (for identity verifica

Show full names
Use it only when checking identity. Names normally stay masked.

3 CSV Download

CSV
Export the list as a CSV.

4 Roster CSV (with registration codes)

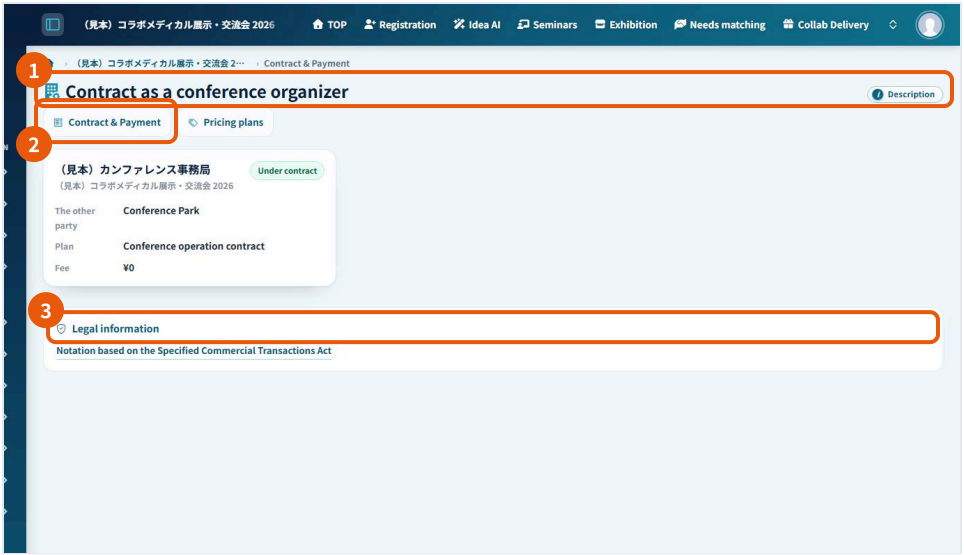
Roster CSV (with registration codes)
This is the roster for the venue's badge printers and entry gates.

3

Your Contract as an Organizer

1 screens

Contract and payments (your contract as an organizer)



1 Contract as a conf

Contracts as an operator
Contracts in the role you are viewing now.

2 Contract & Payment

All contracts (Contracts & Billing)
Opens the page that lists your personal, organizer and exhibitor contracts together. Apply for a plan and see invoices and payments there.

3 Legal information

Legal notices
The legally required notices, with the service provider when registered.

If you need help

- Use "i Description" at the top right of a screen to see how that screen works.
- Use "Contact" at the bottom of the screen to reach our staff.
- The latest version of this guide is at https://cpk.jp/manual/pdf