# SimuLive User Guide

Getting Started with Runbooks for Automated Meetings and Webinars
(Microsoft Teams)

## 1. Getting Started

Before creating runbooks for your automated Teams meetings and webinars, you need to connect your Microsoft Teams account and your Google account. Microsoft Teams is where SimuLive creates and runs your events, and Google Drive stores your content files.

### Connect Your Microsoft Teams Account

Connecting your Microsoft 365 work or school account authorizes SimuLive to create and run automated Teams meetings and webinars on your behalf.

1. Go to **Dashboard** → **Integrations** → **Microsoft Teams**.
2. In **Public Client**, click the **Connect to Teams** button.
3. Sign in with your Microsoft 365 work or school account.
4. Review the permissions on the Microsoft screen and click **Accept**.
5. You will see **Active** status when connected.

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> **Note:** If Microsoft shows an approval required message, your organization requires an administrator to approve new apps. Ask your Microsoft 365 administrator to approve SimuLive, then connect again. For Host to join your meetings, an administrator also approves the SimuLive calling permissions once for your organization in Microsoft Entra admin center, Enterprise applications, SimuLive, Permissions, Grant admin consent. Teams webinars and meeting chat features require a work or school account whose Microsoft 365 plan includes them.

### Google Drive (Required)

Google Drive is required for all SimuLive platforms. It stores your video files, chat message files, and participant name files. Connect it from the Google Drive & Meet tab under Integrations.

1. Go to **Dashboard** → **Integrations** → **Google Drive & Meet**.
2. Click **Connect Google**.
3. On the Google authorization screen, review the requested permissions.
4. You will see **Active** status when connected.

> **Note:** Google Drive access is always required regardless of which platform (Zoom, Google Meet, or Teams) you use for your runbooks.

# 2. Creating a Runbook

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

## Step 1: Config

Configure the technical settings for your meeting or webinar, 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 **Microsoft Teams 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 meeting or webinar assets.
6. If you do not have content yet, go to the **Upload Files Tab**.
7. Click **Next** to continue.

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## Uploading Files

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

| Subscription | Files You Need |
|---|---|
| Silver | Video file (.mp4) |
| Gold | Video file (.mp4) |
| Platinum or Diamond | Video file (.mp4) + messages.xlsx + participant-names.xlsx |

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 meeting or webinar.

> **Note:** Visit simulive.us/pricing to see which features are included in your subscription plan.

### Step 2: Details

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

1. To reuse a Teams meeting or webinar you already scheduled, turn on **Import from Existing Event** and pick it from the list. Each event shows a **Meeting** or **Webinar** badge.

2. If the list is empty, paste the Teams meeting join link and click **Use link**. Use this with a personal Microsoft account, which cannot create Teams meetings through SimuLive. A pasted link runs as a Meeting and registration is not available.

3. Enter a **Title** for your runbook.

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

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

6. Set the **Date**, **Time**, and **Timezone** for your event.

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

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

9. To register attendees for a one time Webinar, turn on **Registration**.

10. Click **Create Runbook**.

> **Note:** Schedule time must be at least 5 minutes in the future. When you choose Webinar, SimuLive creates a real Teams webinar for one time schedules. If you choose a recurring schedule, SimuLive creates a Teams meeting instead. Registration is available for one time Webinars only. After you create the runbook, open the **Registration** icon on it, upload your registrants file (only the email column is required), and select **Sync Registrants**. Your Microsoft 365 administrator approves the SimuLive webinar registration permission once. Microsoft does not let apps change or cancel these registrations, so manage them in the webinar in Teams.

## 3. Starting a Teams Webinar

Microsoft Teams only lets the organizer start a webinar and choose who attendees see. Microsoft does not offer an API for apps to do this, so for every Teams webinar run SimuLive emails you these steps, even if runbook notifications are turned off. Teams meetings do not need these steps.

1. Open the email **Action Required: Start your Teams webinar** and click **Open Webinar in Teams**. Use the Microsoft account that organizes the webinar.

2. Select **Start meeting** at the top of the meeting window. Until you do, attendees wait and cannot see anything.

3. Open **People**, find **Host**, select the three dots next to it, and choose **Bring on screen**.

4. SimuLive starts your content from the beginning as soon as Teams lets Host share.

> **Note:** If you do not see Bring on screen, open Meeting options, go to Engagement, turn off Manage what attendees see, and then make Host a presenter.

## 4. Adding Live Stream

Extend your meeting or webinar reach by broadcasting to external platforms such as YouTube, Facebook, Twitch, TikTok, and custom RTMP. After creating a runbook, you can schedule a live stream to share your content with a wider audience.

1. Open your meeting or webinar runbook.
2. Click **Schedule Live Stream**.
3. Set the stream start time (must be within plus or minus 1 minute of your runbook start time).
4. For each platform, enter your **Stream Key** and **Stream URL**, then click **Save All**.

> **Note:** You must start the Source Encoder before starting any individual stream destinations.

## 5. When Your Runbook Runs

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At your scheduled time, SimuLive automatically handles everything for your Teams meeting. For a Teams webinar, SimuLive does the same as soon as you start the webinar and bring Host on screen.

At your scheduled time, everything starts automatically:

- The SimuLive host joins your Teams meeting or webinar as **Host**
- Your video and audio play from the beginning
- Live streaming begins (if scheduled)
- Scheduled chat messages are posted in the meeting chat (if included in your subscription)
- SimuHost answers attendee questions in the meeting chat, if you set it up (if included in your subscription)
- In Teams meetings, SimuHost sends each attendee a private welcome message, if you set it up (if included in your subscription)

Host leaves when your event ends. You can **Abort** a running runbook at any time if needed.

# 6. SimuHost in Teams Chat

SimuHost is the optional AI co-host that answers attendee questions in your Teams meeting chat using your own AI provider key. Set it up from the SimuHost window on your runbook.

- Type **ask** followed by the question, for example **ask What will we cover today?**
- Reply to a message in the chat and type **ask** in the reply to ask about that message.
- If you set a custom @handle in your profile, attendees can type **@yourhandle** followed by the question.

> **Note:** SimuHost answers while SimuLive is running your event, from the moment the Host joins until the event ends.

## Private Questions

In Teams meetings, each attendee who joins with a Microsoft account gets a private welcome message from your Teams account a few seconds after joining. It explains how to ask in the meeting chat, and attendees can also reply in that private chat to ask privately, with no command needed. SimuHost answers there, and anything you type in that chat yourself is left to you. Teams webinars use the meeting chat only.

> **Note:** Private welcome messages need the Teams permission to start chats. If your Teams account was connected before this feature, disconnect and connect it again in **Dashboard** → **Integrations** → **Microsoft Teams**.

> **Note:** In Teams meetings, SimuLive can create captions of what is said aloud so SimuHost can answer from them. Captions are only sent to your AI provider when you turn on Share live session details with SimuHost. Attendee emails and other chat messages are never shared.

## SimuLive in Group Chats

Add SimuLive to a Teams group chat and @mention **SimuLive**. **hi** or **hello** gets a welcome, **help** explains how SimuLive works with links to sign up, get started, help and contact us, and any other message gets a short reply pointing to help.

# 7. Editing a Runbook

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

1. Go to **Dashboard** → **Runbooks**.
2. Click on the runbook you want to edit.
3. Click **Edit**.

4. Make your changes and save. SimuLive updates the Teams meeting or webinar to match.

> **Note:** You cannot edit a runbook while it is running.

## 8. Deleting a Runbook

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

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

| Option | What Happens |
|---|---|
| Delete Runbook Only | Removes from SimuLive, keeps the Teams meeting or webinar |
| Delete Associated Event | Removes the runbook AND cancels the Teams meeting or webinar |
| Delete Current Occurrence | For recurring meetings: removes only this one |
| Delete All Occurrences | For recurring meetings: removes the entire series |

## 9. Disconnecting Accounts

Remove your linked Microsoft account if you need to switch to a different account or revoke SimuLive access to Microsoft Teams. Disconnecting deletes the stored Microsoft credentials from SimuLive.

- Go to **Dashboard** → **Integrations** → **Microsoft Teams**
- Click **Disconnect** next to the account
- Confirm when prompted

> **Note:** Disconnecting your Microsoft account stops SimuLive from creating or running Teams events for any runbooks that use this account.

## 10. Deleting Your Account

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

- Go to **Dashboard** → **Settings** → **Delete Account**
- Your account will be deactivated immediately
- Permanent deletion completes within 30 days

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

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# Resources

## Blog

| Section | Link |
|---|---|
| What is SimuLive? | https://simulive.us/blog/what-is-simulive-complete-guide-automated-webinars-meetings-2025 |
| How to Create Your First Automated Meeting | https://simulive.us/blog/how-to-create-first-automated-webinar-meeting-simulive |
| Automated Microsoft Teams Meetings and Webinars | https://simulive.us/blog/how-to-create-automated-webinar-meeting-microsoft-teams-simulive |
| How to Connect Google Drive | https://simulive.us/blog/how-to-connect-google-drive-simulive |
| SimuHost AI Brain and Bring Your Own Key | https://simulive.us/blog/simulive-ai-brain-simuhost-bring-your-own-key |
| Live Streaming to YouTube, Facebook, Twitch and TikTok | https://simulive.us/blog/live-streaming-youtube-facebook-twitch-tiktok-simulive |

## Integrations

| Section | Link |
|---|---|
| Microsoft Teams Integration | https://simulive.us/dashboard#integrations-teams |
| Google Drive & Meet Integration | https://simulive.us/dashboard#integrations-google |
| Knowledge Base · Microsoft Teams | https://simulive.us/knowledge-base/teams |
| Knowledge Base · Google | https://simulive.us/knowledge-base/google |
| Knowledge Base · SimuLive | https://simulive.us/knowledge-base/simulive |

## User Manuals & Support

| Section | Link |
|---|---|
| User Manual (General) | https://simulive.us/user-manual |
| User Manual · Microsoft Teams | https://simulive.us/user-manual/microsoft-teams |
| User Manual · AI Brain & BYOK | https://simulive.us/user-manual/ai-brain |
| User Manual · Google Meet | https://simulive.us/user-manual/google-meet |
| Pricing | https://simulive.us/pricing |
| FAQs | https://simulive.us/faqs |
| Support | https://simulive.us/support |

## Legal

| Section | Link |
|---|---|
| Privacy Policy | https://simulive.us/legal/privacy-policy |
| Terms of Service | https://simulive.us/legal/terms-of-service |