

# Platform Training for Chamber & Associations

## By Customer Success Team

# Outline



1. Introduction
2. Designing for Branding
3. New Data Points: Onsite Toolkit Session
4. Membership Workflow Session
5. Registration workflow
6. Data Integrity

# Introduction into the depth of EventBank platform

Dashboard, Field Settings and Synchronization

# Dashboards

Welcome to your dashboard, Ekaterina!  
My Dashboard

**Organization Summary** Last 30 days

<p>approx. RMB 44.9k</p> <p>VALUE OF PAYMENTS</p>	<p>12</p> <p>EVENTS</p> <p>39 Attendees</p>	<p>45</p> <p>NEW CONTACTS</p> <p>2,034 Total Contacts</p>	<p>10</p> <p>CAMPAIGNS SENT</p> <p>21 Emails Sent</p>	<p>+24</p> <p>MEMBERSHIPS</p> <p>35 New, 11 Churned 155 Total Active Memberships</p>
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**Current Events** 5

<p>中信银行芝加哥投资精选讲座</p> <p>Current Dec 15, 2018 to Sep 1, 2019</p> <p>80%</p> <p>4 / 5 Checked In</p>	<p>就诊预约-天通苑店</p> <p>Current Jan 1, 2019 to Dec 31, 2020</p> <p>43%</p> <p>3 / 7 Checked In</p>	<p>展望未来环境保护大会</p> <p>Current May 7, 2019 to August 5, 2019</p> <p>0%</p> <p>0 / 10 Checked In</p>	<p>港大ICB校友“终身学习奖学金”</p> <p>Current May 27, 2019 to June 30, 2019</p> <p>50%</p> <p>1 / 2 Checked In</p>	<p>中国潜水打捞行业协会信息收集</p> <p>Current June 3, 2019 to August 1, 2019</p> <p>0%</p> <p>0 / 1 Checked In</p>
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**Recently Scheduled & Sent Campaigns**

Campaign	Recipients	Opened	Clicked
check app Sent May 29, 2019 6 PM	1	1	0
test Sent May 29, 2019 1:18 PM	3	1	1
TestForDB Sent May 28, 2019 11:24 AM	2	1	0
Internet Sent May 24, 2019 6:31 PM	1	0	0
test Sent May 23, 2019 7:52 PM	1	1	1

[See all sent campaigns](#)

**Campaign Summary** Last 30 days

<p>21</p> <p>EMAILS SENT</p> <p>10 Campaigns</p>	<p>5%</p> <p>BOUNCE RATE</p> <p>1 Bounced</p>
<p>33%</p> <p>OPEN RATE</p> <p>7 Opened</p>	<p>14%</p> <p>CLICK RATE</p> <p>3 Unique Clicks</p>

**Renewal Health Check** All

46% RENEWAL RATE  
226 Renewed, 264 Expired

4 months and 2 days AVERAGE TIME TO RENEW

**Value of Open Opportunities**

approx. RMB 8,636k  
TOTAL VALUE  
66 Open Opportunities

[See all opportunities](#)



Select the widgets you want to display in this dashboard



## Organization Widgets

<p><b>Account Information</b></p> <p>Profile, team member and website information.</p> <p>Select</p>	<p><b>Organization Activity Timeline</b></p> <p>A running history of team members' actions across the platform.</p> <p>Select</p>	<p><b>Organization Summary</b></p> <p>Organization revenue, # of events, # of new contacts, # of campaigns sent, and # of memberships during your selected time frame.</p> <p><input checked="" type="checkbox"/> Selected</p>
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## CRM Widgets

<p><b>My Assigned Companies</b></p> <p>Companies that list you as the owner.</p> <p>Select</p>	<p><b>My Assigned Contacts</b></p> <p>Contacts that list you as the owner.</p> <p>Select</p>	<p><b>My Assigned Opportunities</b></p> <p>Opportunities that list you as the owner.</p> <p>Select</p>
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## Event Widgets

<b>Current &amp; Upcoming</b>	<b>Favorited Events</b>	<b>Past Events</b>
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## Finance Widgets

<p><b>Open and Overdue Invoices</b></p> <p>Value of open invoices and number of overdue invoices during your selected time frame.</p> <p>Select</p>	<p><b>Recently Added Payments</b></p> <p>New payments recently added.</p> <p>Select</p>	<p><b>Value of Payments</b></p> <p>Value of all payments during your selected time frame.</p> <p>Select</p>
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Cancel Save

# Contact and Company Dashboard



Each contact and company have their own dashboards

CRM

Back to Contacts

**Ekaterina Vaulina** Customer Success Manager at Focus Pocus  
Member Speaker Subscriber  
Committee Opt-in

Edit Profile Add Note Add Attachment Email Campaign More

Owner: Ekaterina Vaulina

ekaterina.vaulina@eventbank.com  
Moscow, Russian Federator

Payments & Invoices +

Memberships (43) +

Contact Lists (2) +

Opportunities +

Tasks (1) +

Attachments +

Activities Profile Information Subscriptions & Committees **Metrics**

**Events** This year

13 REGISTERED EVENTS

- 0% Canceled (0)
- 77% Not checked in (10)
- 23% Checked in (3)

6 as a speaker

19 total registered events - Last event happened 8 days ago [See all event activities >](#)

**Campaigns** This year

9 SENT

- 0% Bounced (0)
- 78% Opened (7)

44% Click rate (4)

25 total sent campaigns - Last opened 5 days ago [See all campaign activities >](#)

**Payments** This year

\$11,789.60 TOTAL VALUE

- 0% Events (\$15)
- 100% Memberships (\$11.8k)
- 0% Custom Invoices (\$0)

Last payment added 33 days ago [See all payment activities >](#)

CRM

Back to Companies

**EventBank** Member Sponsor

Edit Profile Add Note Add Attachment Create Membership Application More

Owner: Sol Han

Payments & Invoices +

Memberships (2) +

Company Lists +

Opportunities +

Tasks +

Attachments +

Activities Profile Information **Contacts** Metrics

**Contacts Engagement** This year

NAME	MEMBER SINCE	SUBSCRIPTIONS	COMMITTEES	EVENTS REGISTERED	NUMBER OF TICKETS
Sol Han	12-01-2017	1	2	11	40
Bem Liu	--	1	0	2	2
Ekaterina Vaulina	01-01-2016	1	4	14	39
Bruce Wang	--	1	0	0	0

**Payments** This year

\$131.10 TOTAL VALUE

- 0% Events (\$0)
- 100% Memberships (\$131.1)
- 0% Custom Invoices (\$0)

Last payment added 33 days ago [See all payment activities >](#)

# My Dashboard



## My dashboard

- Organization widgets
- Event widgets
- Finance widgets

Your team's CRM dashboard

Your team's Membership dashboard

Your team's Campaign dashboard

The dashboard is organized into three main sections: Organization Widgets, Event Widgets, and Finance Widgets. Each widget includes a title, a brief description, and a 'Selected' button.

### Organization Widgets

- Account Information**: Profile, team member and website information.  Selected
- Organization Activity Timeline**: A running history of team members' actions across the platform.  Selected
- Organization Summary**: Organization revenue, # of events, # of new contacts, # of campaigns sent, and +/- # of memberships during your selected time frame.  Selected
- Tasks Added by Me**: All tasks that you have added across the platform.  Selected
- Tasks Assigned to Me**: All tasks that list you as the owner.  Selected

### Event Widgets

- Current & Upcoming Events**: Events that are taking place now or will be occurring soon.  Selected
- Favorited Events**: Events you have favorited.  Select
- Past Events**: Events that recently took place.  Select

### Finance Widgets

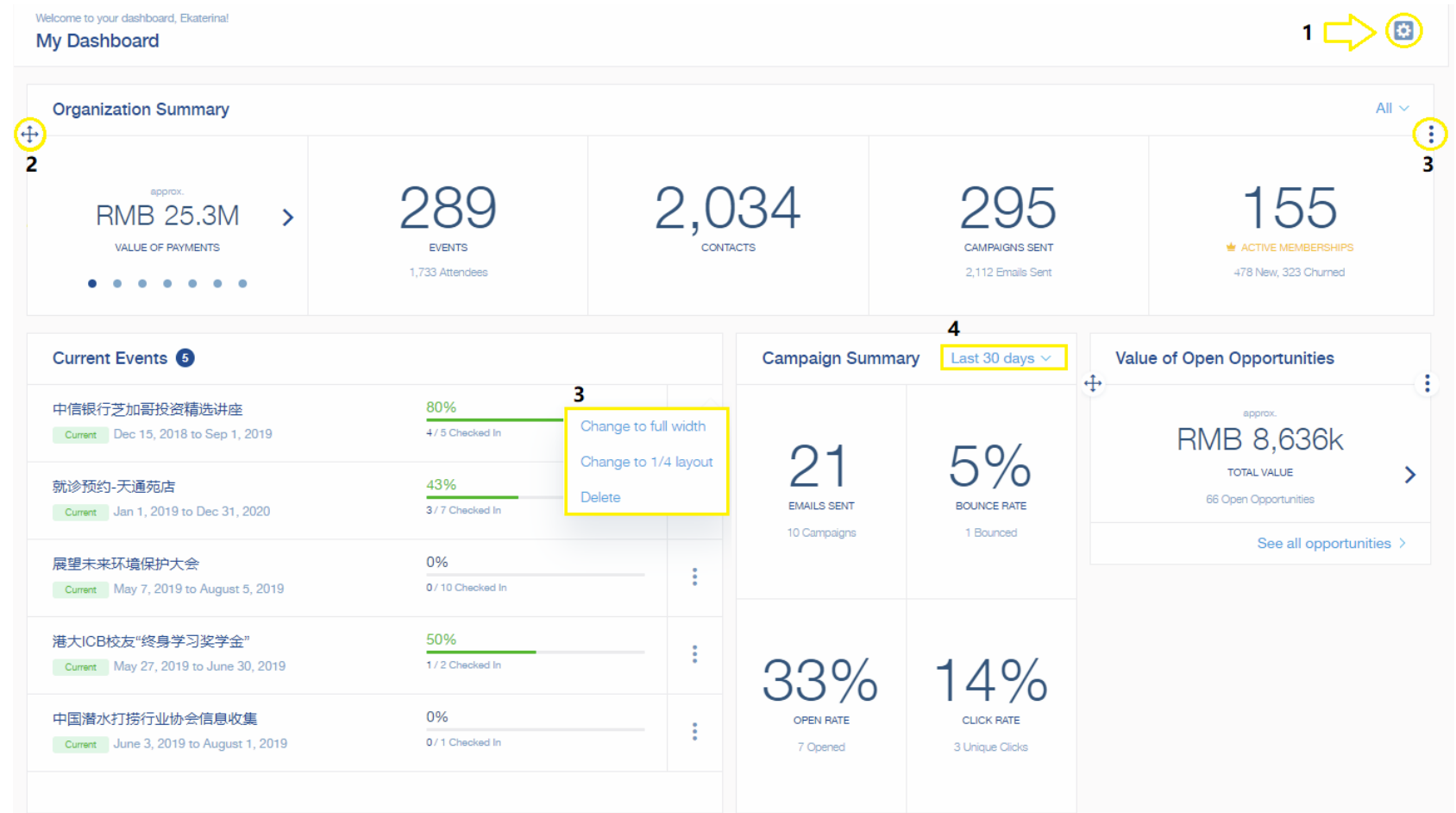
- Open and Overdue Invoices**: Value of open invoices and number of overdue invoices during your selected time frame.  Select
- Recently Added Payments**: New payments recently added.  Select
- Value of Payments**: Value of all payments during your selected time frame.  Select

# My Dashboard Control



1. Choose which module widgets to display
2. Drag & Drop
3. Adjust the size
4. Adjust the timeframe of the data

## Types of widgets


- Statistics
- List
- Number





Welcome to your dashboard, Ekaterina!  
My Dashboard

1  

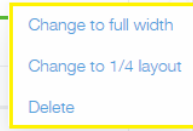
### Organization Summary

All 


2 

approx. RMB 25.3M VALUE OF PAYMENTS 	289 EVENTS 1,733 Attendees	2,034 CONTACTS	295 CAMPAIGNS SENT 2,112 Emails Sent	155 ACTIVE MEMBERSHIPS 478 New, 323 Churned
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### Current Events

中信银行芝加哥投资精选讲座 Current Dec 15, 2018 to Sep 1, 2019	80% 4 / 5 Checked In	3  <ul style="list-style-type: none"><li>Change to full width</li><li>Change to 1/4 layout</li><li>Delete</li></ul>
就诊预约-天通苑店 Current Jan 1, 2019 to Dec 31, 2020	43% 3 / 7 Checked In	
展望未来环境保护大会 Current May 7, 2019 to August 5, 2019	0% 0 / 10 Checked In	
港大ICB校友“终身学习奖学金” Current May 27, 2019 to June 30, 2019	50% 1 / 2 Checked In	
中国潜水打捞行业协会信息收集 Current June 3, 2019 to August 1, 2019	0% 0 / 1 Checked In	


### Campaign Summary

Last 30 days 

21 EMAILS SENT 10 Campaigns	5% BOUNCE RATE 1 Bounced
33% OPEN RATE 7 Opened	14% CLICK RATE 3 Unique Clicks

### Value of Open Opportunities

approx.  
RMB 8,636k  
TOTAL VALUE  
66 Open Opportunities

See all opportunities 

# Your team's CRM dashboard



1. New Contacts
2. New Companies
3. Open opportunities
4. Value of Open Opportunities
5. Recently Added Contacts
6. Recently Added Companies
7. My Assigned Contacts
8. My Assigned Companies

The dashboard is divided into several sections:

- New Contacts (Last 30 days):** 45 NEW CONTACTS (2,034 Total Contacts). [See all contacts >](#)
- New Companies (Last 30 days):** 24 NEW COMPANIES (276 Total Companies). [See all companies >](#)
- Open Opportunities:** 66 OPEN OPPORTUNITIES. [See all opportunities >](#)
- Value of Open Opportunities:** approx. RMB 8,636k TOTAL VALUE (66 Open Opportunities). [See all opportunities >](#)
- Recently Added Contacts:** Table with columns: LAST NAME, FIRST NAME, EMAIL, PHONE, ACTIONS.

	LAST NAME	FIRST NAME	EMAIL	PHONE	ACTIONS
CL	Liu	Carol	carol108@163.com	--	⋮
MZ	Zhang	Makayla	1150714809@qq.com	--	⋮
CL	Liu	Carol	carolliu1@163.com	--	⋮
MZ	Zhang	Makayla	dxl@cansi.org.cn	010-595182	⋮
MZ	Zhang	Makayla	shyhzi2008@163.com	021-341409	⋮
MZ	Zhang	Makayla	zglxinxichu@126.com	010-660335	⋮
MZ	Zhang	Makayla	hgjnxh@energymarket.cn	010-820373	⋮

[See all contacts >](#)
- Recently Added Companies:** Table with columns: COMPANY NAME, EMAIL, PHON, ACTIONS.

	COMPANY NAME	EMAIL	PHON	ACTIONS
	eventbank Beijing Office eventbank beijing office	--	--	⋮
	中国公园协会	--	--	⋮
	中国医药生物协会	--	--	⋮
	中国粮食商业协会	--	--	⋮
	上海皮革技术协会	--	--	⋮
	中国化学试剂工业协会	--	--	⋮

[See all companies >](#)
- My Assigned Contacts:** Table with columns: LAST NAME, FIRST NAME, EMAIL, PHONE, ACTIONS.

	LAST NAME	FIRST NAME	EMAIL	PHONE	ACTIONS
EA	Awesome	Ekaterina	awesome@gmail.com	--	⋮
	Garin	Ivan	t345@02934.com	--	⋮
	Zhao	Xingyu	xingyu.zhao@eventbank.com	--	⋮
- My Assigned Companies:** Table with columns: COMPANY NAME, EMAIL, PHONE, FAX, WEBSITE, ACTIONS.

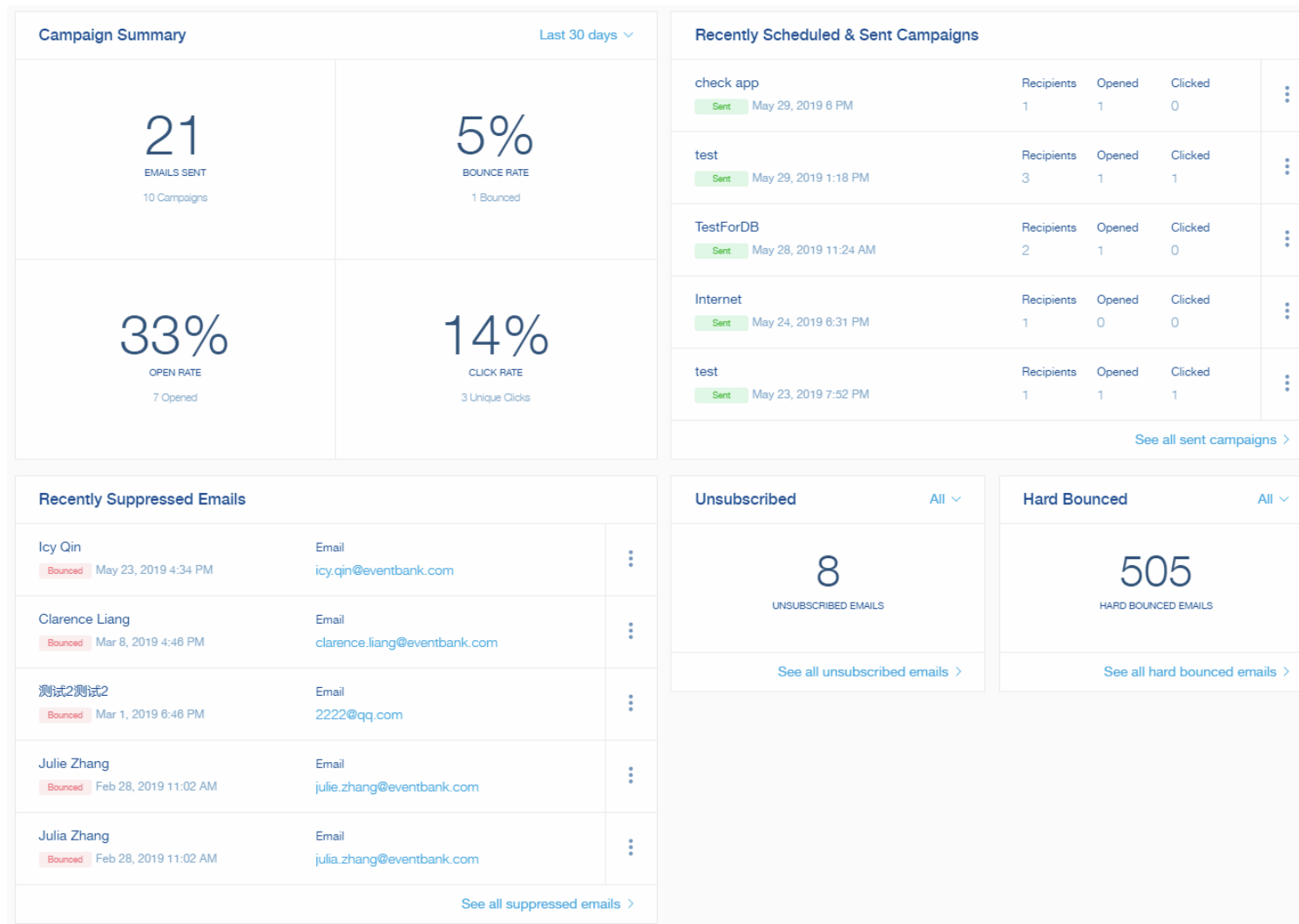
	COMPANY NAME	EMAIL	PHONE	FAX	WEBSITE	ACTIONS
	Eventbank	--	--	--	--	⋮



# Your team's Campaign dashboard



1. Campaign Summary
2. Recently Scheduled & Sent Campaigns
3. Recently Suppressed Emails
4. Unsubscribed
5. Hard bounced



# Your team's Membership dashboard



1. Active Members
2. Active Memberships
3. New & Churned Memberships
4. Membership Applications
5. Membership Renewals
6. New Memberships
7. New Members
8. Renewal Health Check
9. Application Awaiting Payment
10. Renewal Awaiting Payment

The dashboard provides a comprehensive overview of membership data, organized into several key sections:

- Active Members:** 216 MEMBERS. Includes a link to "See all members".
- Active Memberships:** 155 MEMBERSHIPS.
- New & Churned Memberships (Last 30 days):** 35 NEW MEMBERSHIPS and 11 CHURNED MEMBERSHIPS.
- Membership Applications (128):** A list of pending applications, including:
  - 捷会易 (Awaiting Payment)
  - Dou Wendy (Awaiting Payment)
  - EventBank (Awaiting Activation)
  - 黑卡会员 (Applied on May 24, 2019)
  - 嘉年华VIP专享 (Applied on May 23, 2019)
  - annual fee (Applied on Mar 11, 2019)
- Membership Renewals (226):** A list of upcoming renewals, including:
  - Wanxiang America Corporation (test membership, Expiring on Jun 30, 2019)
  - EventBank捷会易 (Intern Membership, Expiring on Jun 29, 2019)
  - 溢美企业管理咨询(上海)有限公司 (企业会员, Expiring on Jun 30, 2019)
- New Memberships:** A list of recent new memberships, such as Catherine Beck (Sep 9, 2019) and EventBank捷会易 (Sep 2, 2019).
- New Members:** A list of new members, including Catherine Beck (Senior Manager at EventBank捷会易) and several EventBank捷会易 members.
- Renewal Health Check (All):** A highlighted section showing a 46% RENEWAL RATE (226 Renewed, 26+ Expired) and an AVERAGE TIME TO RENEW of 4 months and 2 days.
- Applications Awaiting Payment:** Approx. RMB 2,531k TOTAL VALUE (99 Applications Awaiting Payment).
- Renewals Awaiting Payment:** Approx. RMB 2,426k TOTAL VALUE (35 Renewals Awaiting Payment).

# Your team's Dashboard Control



Admin has permissions to setup your team's dashboards

[Go to Home Dashboard](#)

## Account Settings

- Account Settings
- Profile
- Team Members
- Roles & Permissions**
- Consent Preferences
- CRM Settings
- Event Settings
- Campaign Settings
- Membership Settings
- Finance Settings
- Field Settings

### Account Settings

- Admin
- Manager
- Marketeer
- Finance
- Member
- Observer
- Sponsor
- [Add Role](#) +

By default the Admin has access to all pages and actions. The Admin role can not be deleted.

This permission tool allows you to very specifically define who can access and edit which sections within your organization. Changes are applied automatically.

[Reset Permissions](#) [Duplicate Role](#)

	View	Update	Create	Remove
<b>Admin Section</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Team Members	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Roles & Permissions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Organization Teams	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Organization Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Team Dashboards</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field Settings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Export History***	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>CRM Section</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Campaign Section</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Membership Section</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Events (if not part of event team*)</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Finance Sections</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

\* Team Members who are part of the event team will still be able to access and update any section within that event  
\*\* Team Members who are assigned to a specific item (examples include contacts, memberships, renewals, etc) will still be able to access and update that specific item.  
\*\*\* If activated, the export history page will show all organization items available for export. If not, each team member will only see his or her own exports. Export permissions can be adjusted in the other sections for each team member role.

# Field Settings

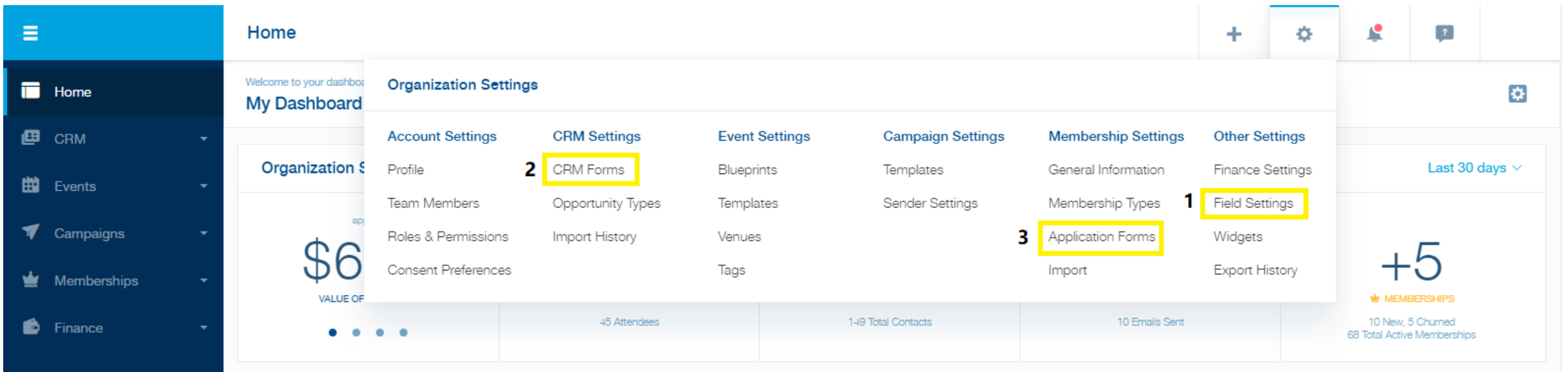


**Default Fields** – most commonly used fields proposed by EventBank. Exist in the Menu bar in CRM, Registration, Application Forms and cannot be modified.

**Custom Fields** – created by the organization with own requirements for data collection. Created and exist in Field Settings, can modified.

**Default Fields** and **Custom Fields** together create CRM, Event Registration and Application forms.

**Attention!** For Event Registration Fields you can choose to skip general Field Settings and create fields directly in the Event. No synchronization with CRM.



# Contact and Company

## Contact Default Fields

First Name – short text (mandatory)

Last Name – short text (mandatory)

Company – short text

Position – short text

## Company Default Fields

Company Name – short text (mandatory)

Website – link

## Contact & Company Default Fields

Email – email (mandatory for Contact)

Phone – phone

Address – comment box

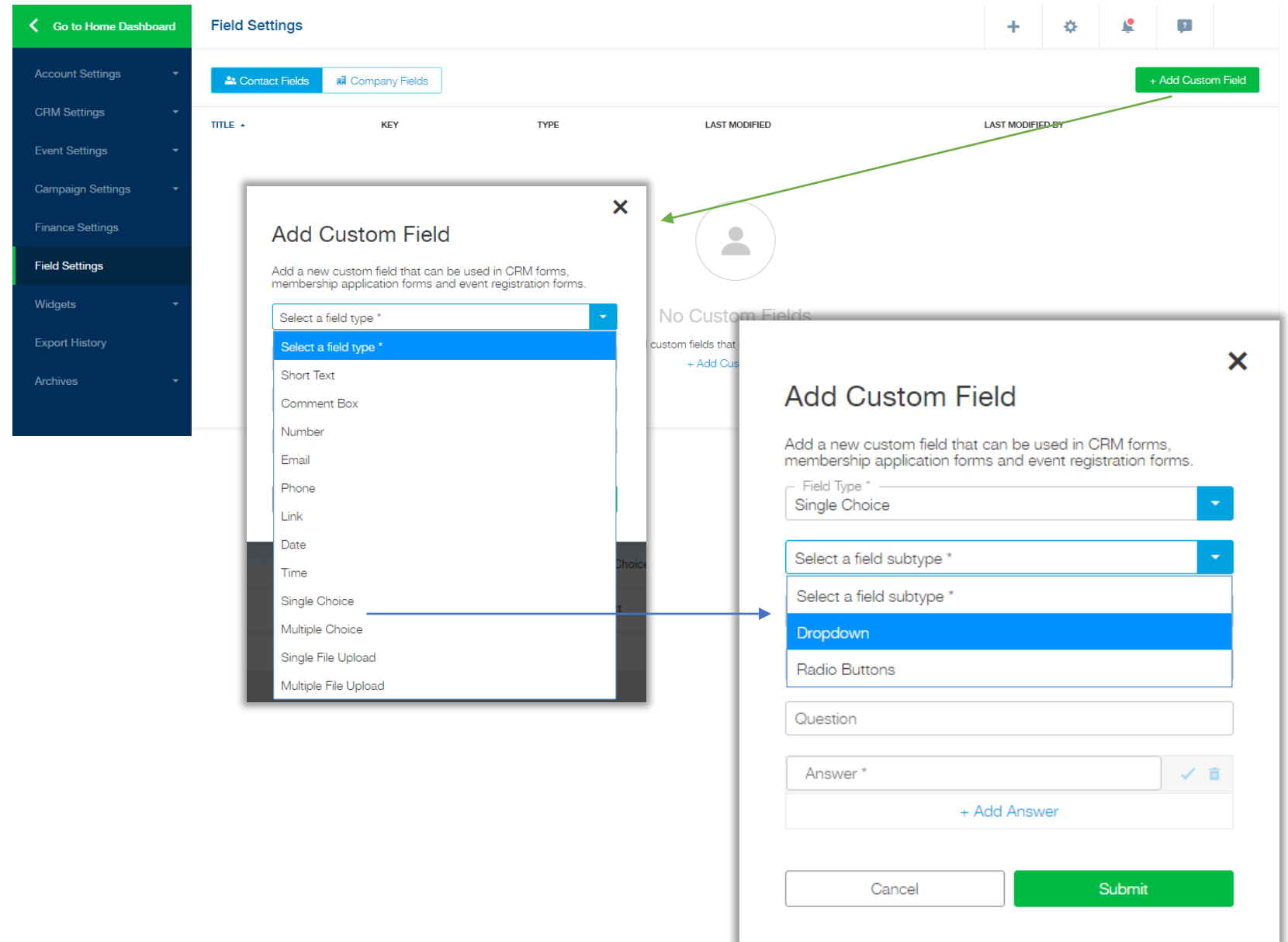
City – short text

Province/State – short text

Postal Code/Zip Code – short text

Country/Region – single choice

Industry – single choice



The screenshot displays the 'Field Settings' page in the EventBank system. The page is divided into two tabs: 'Contact Fields' and 'Company Fields'. A sidebar on the left contains navigation options: 'Go to Home Dashboard', 'Account Settings', 'CRM Settings', 'Event Settings', 'Campaign Settings', 'Finance Settings', 'Field Settings' (highlighted), 'Widgets', 'Export History', and 'Archives'. The main content area shows a table with columns for 'TITLE', 'KEY', 'TYPE', 'LAST MODIFIED', and 'LAST MODIFIED BY'. A green arrow points from the '+ Add Custom Field' button in the top right to the 'Add Custom Field' dialog box. The dialog box is titled 'Add Custom Field' and contains the following fields: 'Select a field type \*' (dropdown menu), 'Select a field subtype \*' (dropdown menu), 'Field Type \*' (dropdown menu), 'Single Choice' (text input), 'Select a field subtype \*' (dropdown menu), 'Dropdown' (text input), 'Radio Buttons' (text input), 'Question' (text input), 'Answer \*' (text input), and '+ Add Answer' (button). The dialog box also features 'Cancel' and 'Submit' buttons at the bottom.

# Types of fields

Short text – 255 characters

Comment box – 3500 characters

Fields with the validation of the format

Number – validation

Email – validation

Phone – validation in Registration/Membership

Link – validation

Date – validation

Time – validation

Special fields

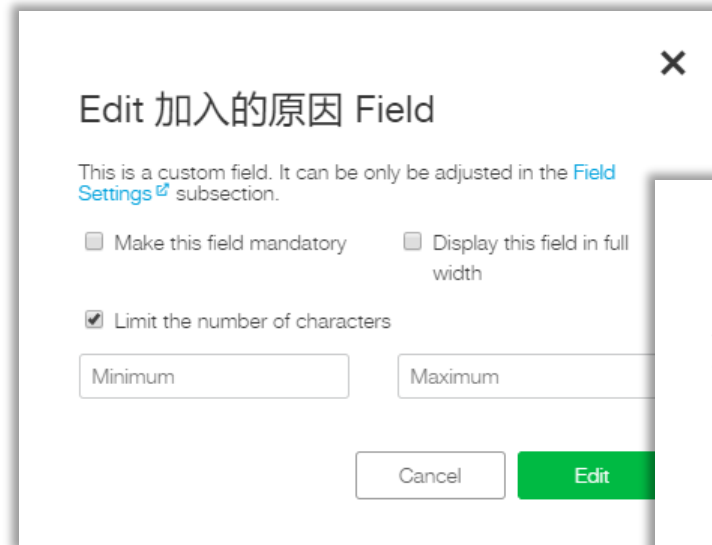
Single choice – special import field

Multiple choice – special import field

Single File Upload – only Registration/Membership

Multiple File Upload – only Registration/Membership

**Attention!** Limitations are applied in the form directly, not in Field Settings when you create a field.



**Edit 加入的原因 Field**

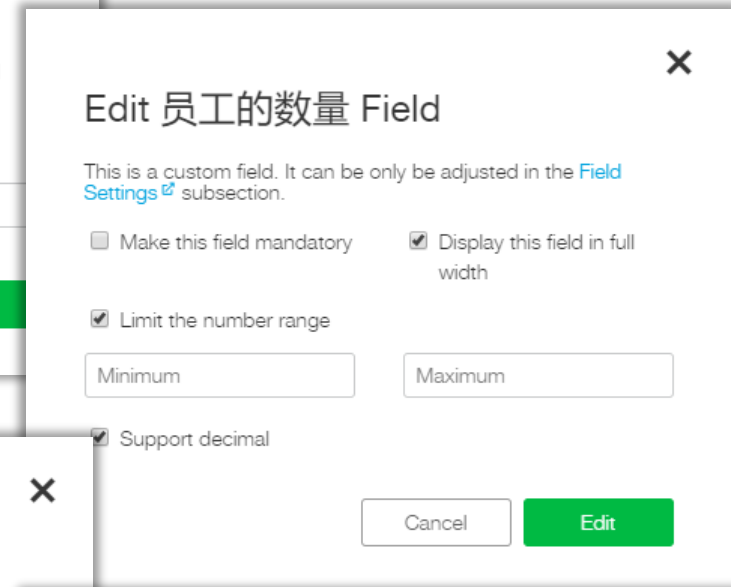
This is a custom field. It can be only be adjusted in the [Field Settings](#) subsection.

Make this field mandatory  Display this field in full width

Limit the number of characters

Minimum  Maximum

Cancel Edit



**Edit 员工的数量 Field**

This is a custom field. It can be only be adjusted in the [Field Settings](#) subsection.

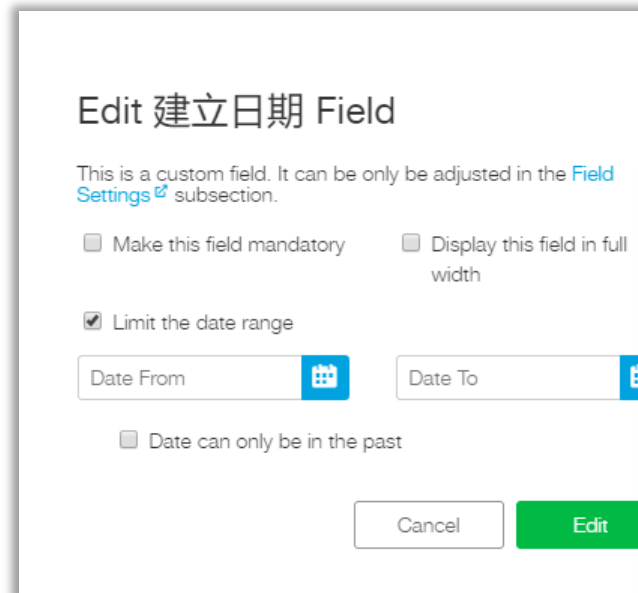
Make this field mandatory  Display this field in full width

Limit the number range

Minimum  Maximum

Support decimal

Cancel Edit



**Edit 建立日期 Field**

This is a custom field. It can be only be adjusted in the [Field Settings](#) subsection.

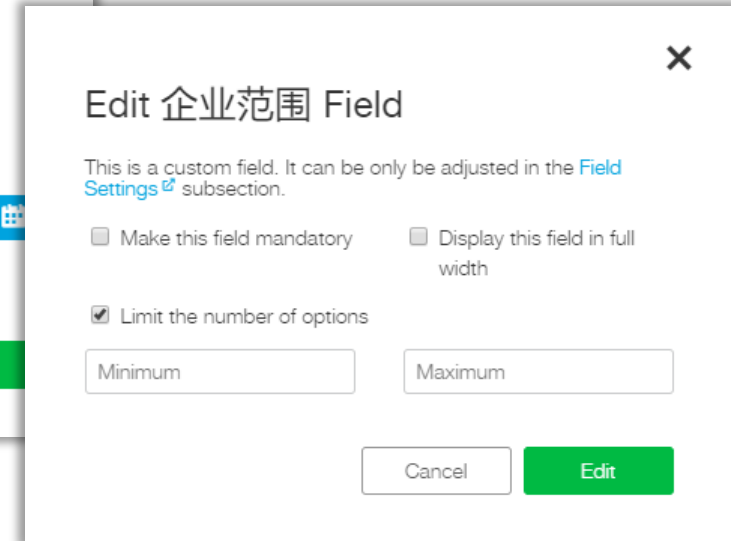
Make this field mandatory  Display this field in full width

Limit the date range

Date From  Date To

Date can only be in the past

Cancel Edit



**Edit 企业范围 Field**

This is a custom field. It can be only be adjusted in the [Field Settings](#) subsection.

Make this field mandatory  Display this field in full width

Limit the number of options

Minimum  Maximum

Cancel Edit

# CRM and Membership synchronization



Default fields always exist in CRM and Application Forms.

Custom Fields will appear in the Menu on the left of CRM and Application Forms in either Contact or Company section depending on where they were created in the Field settings.

The screenshot displays the EventBank CRM interface. At the top, there are tabs for 'Contact Fields' and 'Company Fields', with a '+ Add Custom Field' button. Below this is a table of default fields:

TITLE	KEY	TYPE	LAST MODIFIED	LAST MODIFIED BY	ACTIONS
出生日期	date-of-birth	Date			
性别	gender	Single Ch			
手机电话	mobile-phone	Phone			
国籍	nationality	Short Text			
总公司	text-8fnte7mg	Short Text			
加入的原因	reason-for-joining	Comment			
企业范围	multiple_choice-n0hi2kfh	Multiple C			
领英网页	linkedin-account	Link			

A 'CRM Settings' sidebar is open, showing a menu with options like 'Go to Home Dashboard', 'Account Settings', 'CRM Settings', 'CRM Forms', 'Opportunity Types', 'Import History', 'Event Settings', 'Campaign Settings', 'Membership Settings', 'Finance Settings', 'Field Settings', 'Widgets', 'Export History', and 'Archives'. The 'CRM Settings' option is selected, and a sub-menu is visible with 'Contact Form' and 'Company Form' tabs. The 'Contact Form' tab is active, showing a list of fields: Position, Postal Code/Zip Code, Profile Photo, Province/State, 企业范围, 出生日期, 加入的原因, 国籍, 性别, 总公司, and 手机电话. The '领英网页' field is highlighted in yellow. To the right, a form editor is shown with various input fields and a 'Save' button.

# Corporate Membership



**Attention!** Membership Company Name (Company) and Company of a member (Contact) are two different fields.

**Membership # 60983**  
LPO Company (Beijing)  
Active 1st term

Membership Type: Small and Medium Enterprise (Version 2)  
Start Date: 2019-05-31  
Expiration Date: 2020-05-31

**Membership Details** | Members (1) | Finance Details

RENEWAL | CONFIRMATION | APPROVAL | PAYMENT

Membership Type: Small and Medium Enterprise (Version 2)  
Duration: 12 months  
Start Date: 2019-05-31  
Expiration Date: 2020-05-31  
Base Member Limit: 5  
Additional Purchased: 1  
Owner: n/a

[Export Membership Details](#)

Admin Contact: Ekaterina Vaulina  
ekaterina.vaulina@eventbank.com

**Company Name:** LPO Company (Beijing)

Company officially registered in the US?: Yes  
Number of employees: 50  
Annual revenue: More than \$1 million/year  
Visible in Member Directory: Visible

[View CRM Profile](#)

**Membership # 60983**  
LPO Company (Beijing)  
Active 1st term

Membership Type: Small and Medium Enterprise (Version 2)  
Start Date: 2019-05-31  
Expiration Date: 2020-05-31

Membership Details | **Members (1)** | Finance Details

1 / 6 members [Add New Member](#)

**Ekaterina Vaulina**   
ekaterina.vaulina@eventbank.com  
Senior Manager at LPO Company (Beijing) [Edit](#)

**Information verified by member on 2019-05-31.**

Contact ID #: 1000155  
First Name: Ekaterina  
Last Name: Vaulina  
Email: ekaterina.vaulina@eventbank.com  
**Company:** LPO Company (Beijing)  
Position: Senior Manager  
Parent Company: LPO Company Ltd.  
Member Since: Friday, May 31, 2019  
Last profile update: May 31, 2019 4:02 PM  
Visible in Member Directory: Visible

[View CRM Profile](#)



# Member Table



In the member table the preview shows us the company of a member as this field belongs to the contact form, not company.

Active Members <span>▼</span>								+ Add Member	
6 results filtered by <span>Membership Status</span> <span>Reset filters</span>									
<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	MEMBERSHIP STATUS	MEMBERSHIP START DATE	MEMBERSHIP EXPIRATION DATE	COMPANY	ACTIONS	
<input type="checkbox"/>	Ekaterina	Vaulina	<a href="mailto:ekaterina.vaulina@eventbank.com">ekaterina.vaulina@eventbank.com</a>	Active	2019-05-31	2020-05-31	LPO Company (Beijing)	⋮	
<input type="checkbox"/>	Sol	Han	<a href="mailto:sol.han@eventbank.com">sol.han@eventbank.com</a>	Active	2019-04-09	2020-04-09	Eventbank	⋮	
<input type="checkbox"/>	Ellen	Wang	<a href="mailto:ellen.wang@eventbank.com">ellen.wang@eventbank.com</a>	Active	2017-11-23	2019-11-23	Eventbank	⋮	
<input type="checkbox"/>	Sol	Han	<a href="mailto:sol.han@eventbank.com">sol.han@eventbank.com</a>	Active	2017-10-12	2019-10-12	Eventbank	⋮	
<input type="checkbox"/>	Liang	Swanie	<a href="mailto:admission@tr4930294gz.com">admission@tr4930294gz.com</a>	Active	2017-07-07	2019-07-07	Trinity International Kinde	⋮	
<input type="checkbox"/>	Qi	Wang	<a href="mailto:ewang@distr0293409234on.com.cn">ewang@distr0293409234on.com.cn</a>	Grace Period	2017-05-19	2019-05-19	Parker Migliorini Internatic	⋮	

# Corporate Membership After Change



Change Company of a member, while Membership Company Name remained w/o changes.

The screenshot displays the EventBank membership management interface for Membership # 60983. The interface is divided into several sections:

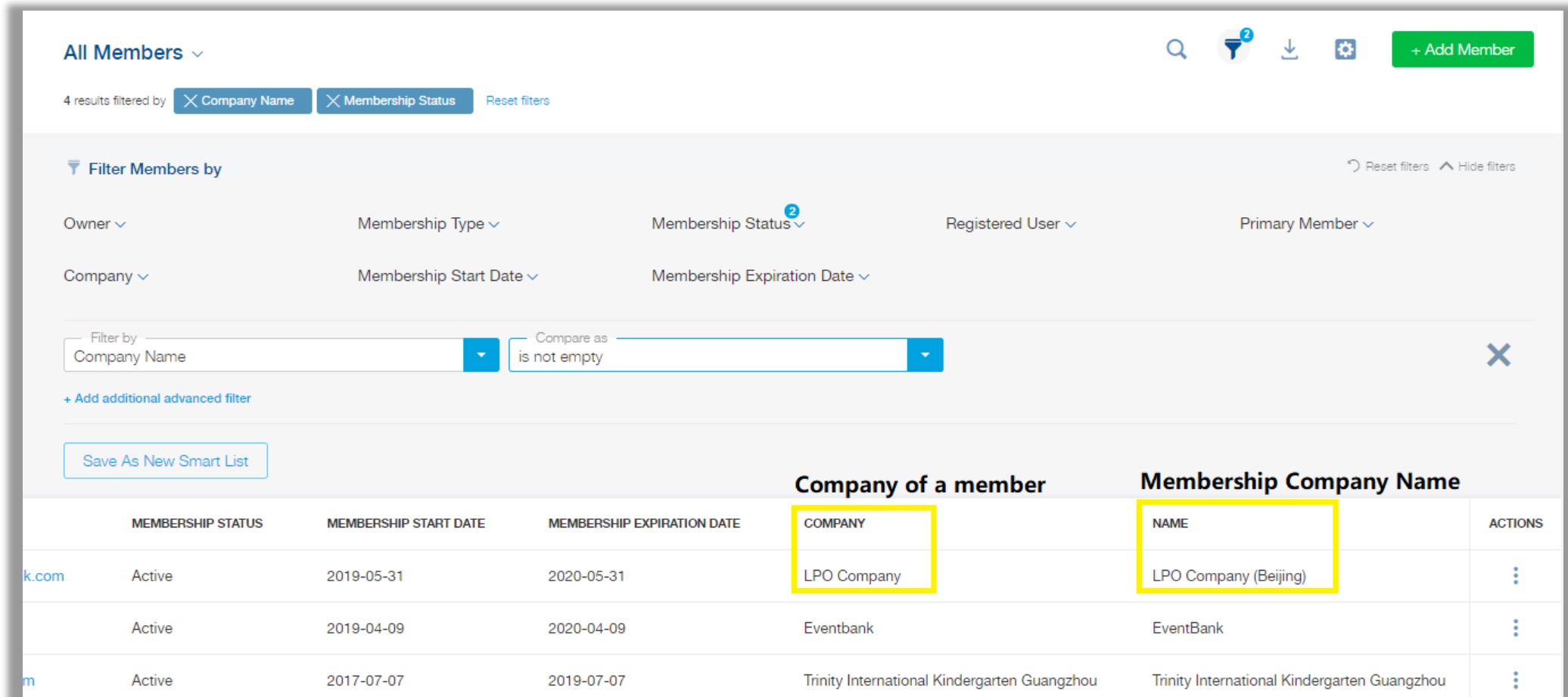
- Membership Summary:** Shows Membership # 60983, LPO Company (Beijing), Active status, 1st term, and Membership Type: Small and Medium Enterprise (Version 2). Start Date: 2019-05-31, Expiration Date: 2020-05-31.
- Membership Details:** Includes a progress bar for RENEWAL, CONFIRMATION, and APPROVAL. Below it, a table lists membership details: Membership Type (Small and Medium Enterprise), Duration (12 months), Start Date (2019-05-31), Expiration Date (2020-05-31), Base Member Limit (5), Additional Purchased (1), and Owner (n/a).
- Members (1):** Lists the member Ekaterina Vulina, Senior Manager at LPO Company, with contact information and a highlighted 'Company: LPO Company' field.
- Membership Timeline:** A vertical timeline for 2019 showing events: Jun 05 (Company update), May 31 (Expiring Soon email), May 31 (Awaiting Payment email), May 31 (Renewal approval), May 31 (Awaiting Approval email), and May 31 (Renewal confirmation).
- Admin Contact:** Ekaterina Vulina, ekaterina.vaulina@eventbank.com.
- Company Details:** A separate section showing Company Name (LPO Company (Beijing)), registration in the US (Yes), 50 employees, annual revenue over \$1 million/year, and visible in the member directory.

A green arrow points from the 'Company: LPO Company' field in the member details to the corresponding event in the timeline: 'Ekaterina Vulina updated his/her company from 'LPO Company (Beijing)' to 'LPO Company''.

# Member Table After Change

Company of a member displayed by default has changed as well.

Membership Company Name can be found with advanced filter. Search bar and Company default filter show the result for the Company of a member.



The screenshot shows the 'All Members' page in the EventBank system. At the top, there are search and filter icons, a '+ Add Member' button, and a notification badge. Below this, it indicates '4 results filtered by' with buttons for 'Company Name' and 'Membership Status', and a 'Reset filters' link. A 'Filter Members by' section contains several dropdown menus: Owner, Membership Type, Membership Status (with a notification badge), Registered User, Primary Member, Company, Membership Start Date, and Membership Expiration Date. A filter bar shows 'Filter by Company Name' and 'Compare as is not empty'. A '+ Add additional advanced filter' link and a 'Save As New Smart List' button are also present. The table below has columns for Membership Status, Membership Start Date, Membership Expiration Date, Company of a member, Membership Company Name, and Actions. The 'Company of a member' and 'Membership Company Name' columns are highlighted with yellow boxes.

	MEMBERSHIP STATUS	MEMBERSHIP START DATE	MEMBERSHIP EXPIRATION DATE	Company of a member COMPANY	Membership Company Name NAME	ACTIONS
k.com	Active	2019-05-31	2020-05-31	LPO Company	LPO Company (Beijing)	⋮
	Active	2019-04-09	2020-04-09	Eventbank	EventBank	⋮
m	Active	2017-07-07	2019-07-07	Trinity International Kindergarten Guangzhou	Trinity International Kindergarten Guangzhou	⋮

# Contact and Company in CRM



**Membership # 60983**  
LPO Company (Beijing)  
Active 1st term

Membership Type: Small and Medium Enterprise (Version 2)  
Start Date: 2019-05-31  
Expiration Date: 2020-05-31

**Membership Details** | Members (1) | Finance Details

RENEWAL | CONFIRMATION | APPROVAL | PAYMENT | COMPLETE

Membership Type: Small and Medium Enterprise (Version 2)  
Duration: 12 months  
Start Date: 2019-05-31  
Expiration Date: 2020-05-31  
Base Member Limit: 5  
Additional Purchased: 1  
Owner: n/a

Export Membership Details | Capex Membership

Admin Contact: Ekaterina Vaulina  
ekaterina.vaulina@eventbank.com

**Company Name:** LPO Company (Beijing)  
Company officially registered in the US?: Yes  
Number of employees: 50  
Annual revenue: More than \$1 million/year  
Visible in Member Directory: Visible

**Back to Companies**

**LPO Company (Beijing)**  
Member

Edit Profile | Add Note | Add Attachment | Create Membership Application | More

Owner: N/A

Payments & Invoices

Memberships (1)

#60983 - LPO Company (Beijing)  
Small and Medium Enterprise  
Active 1st term May 31, 2019 - May 31, 2020  
1/6 slots used

Activities | Profile Information | **Contacts** | Metrics

Company Contacts (0) + Add Contact

FULL NAME | EMAIL | PHONE

No Contacts

**Membership # 60983**  
LPO Company (Beijing)  
Active 1st term

Membership Type: Small and Medium Enterprise (Version 2)  
Start Date: 2019-05-31  
Expiration Date: 2020-05-31

Membership Details | **Members (1)** | Finance Details

1 / 6 members Add New Member

**Ekaterina Vaulina**  
ekaterina.vaulina@eventbank.com  
Senior Manager at LPO Company

Information verified by member on 2019-05-31.

Contact ID #: 1000155  
First Name: Ekaterina  
Last Name: Vaulina  
Email: ekaterina.vaulina@eventbank.com

**Company:** LPO Company  
Position: Senior Manager  
Parent Company: LPO Company Ltd.  
Member Since: Friday, May 31, 2019  
Last profile update: Today at 1:30 AM  
Visible in Member Directory: Visible

**CRM**

**Back to Contacts**

**Ekaterina Vaulina**  
Senior Manager at LPO Company  
Member | Subscriber

Edit Profile | Add Note | Add Attachment | Email Campaign | More

Owner: ?

ekaterina.vaulina@eventbank.com

Payments & Invoices

Memberships (1)

#60983 - LPO Company (Beijing)  
Small and Medium Enterprise  
Active 1st term May 31, 2019 - May 31, 2020  
1/6 slots used

Activities | **Profile Information** | Subscriptions & Committees | Metrics

General Information | Billing Address

Contact Information

First Name: Ekaterina  
Last Name: Vaulina  
Email: ekaterina.vaulina@eventbank.com  
Phone:  
Position: Senior Manager  
Address:  
City:  
Province/State:  
Postal Code/Zip Code:  
Country/Region:  
Industry:  
Nationality:  
Birthdate:  
Mobile Phone:

LPO Company

Save

# CRM and Registration Synchronization



Registration Form includes:

- Default Fields
- Custom fields from Field Settings

**Attention!** Multiple people are allowed to register with the same email address. As a result synchronization is working for contact records that did not exist previously and is one-way (Registration to CRM) only.

The screenshot shows the EventBank registration form configuration interface. At the top, it displays 'Draft Event' and 'Friday Networking 2019 Spring'. Below this, there is a 'Save' button and a message: 'Build your registration form with the below fields to gather attendee information.' The interface is divided into two main sections: 'Existing Fields' and 'Optional fields'.

**Existing Fields:** A list of fields that are already present in the system. The fields listed are: Address, City, Company (already used), Country/Region, Email Address (already used), First Name (already used), Industry, Last Name (already used), Phone (already used), Position (already used), Postal Code/Zip Code, Profile Photo, and Province/State. A yellow box highlights a set of custom fields: 企业范围, 出生日期, 加入的原因, 国籍, 性别, 总公司, 手机电话, and 领英网页.

**Optional fields:** A section for adding new fields. It contains several input fields with red borders and asterisks indicating they are mandatory: Email, First Name, Last Name, and Company. Below these are optional fields: Position, Phone (with a dropdown for country code, currently showing +86), Marital Status (with a dropdown menu), and a text area for 'Are there any questions you would like to be covered in this session?'. At the bottom, there is a dashed box labeled 'Drop an item here'.

# CRM and Registration synchronization



In case, custom fields for the registration form are created directly in the event, no synchronization is possible

The screenshot shows the EventBank registration form editor for a "Draft Event" titled "Friday Networking 2019 Spring". The interface is divided into several sections:

- Existing Fields:** A list of pre-defined fields including Address, City, Company (already used), Country/Region, Email Address (already used), First Name (already used), Industry, Last Name (already used), Phone (already used), and Position (already used).
- Separators:** Options for Title, Text, and Divider.
- Custom Fields:** A grid of field types including Comment Box, Short Text, Number, Date, Time, Link, Single Choice, Multiple Choice, Single File U..., Email, Phone, and Multiple File... This section is highlighted with a yellow border.
- Main Form Builder:** A workspace where fields are placed. It includes mandatory fields for Email, First Name, Last Name, and Company, each with a red border and the text "\* This field is mandatory". It also features an "Optional fields" section with a prompt: "Please fill up the below details to help us gather more information and improve the quality of our events." Below this are fields for Position, Phone (with a country code dropdown set to +86), Marital Status (with a dropdown menu), and a text area for "Are there any questions you would like to be covered in this session?". A dashed box at the bottom indicates a "Drop an item here" area.

# Main take-aways



1. Dashboard are used for visual representation of the data and statistics. My Dashboard is user personalized and team's dashboard are team personalized.
2. There are default fields that sync all the time and custom fields that can be filled separately for each of the form or for all the forms at the same time.
3. There are 12 different types of fields in 2 categories (default and custom), 2 sections (contact and company), 3 modules (CRM, Event, Membership).
4. Corporate Membership Company Name is not Company of a member.
5. Registration to CRM synchronization is one-time and one-way only.

Thank You

