

# Registration Workflow

Key to unlocking your member and community registration secrets

# NEW! Fapiao Release

- Setup Fapiao Delivery Method on your side
  - Event and Membership Fapiao sections combined
- In Finance

Available for export:

- ✓ Delivery Email
- ✓ Delivery Phone
- ✓ Delivery Method
- ✓ Delivery Address

### Export List

Select the fields you want to include in the exported list:  
Select one or more fields \*:

Fapiao Information (12)

Fapiao Type	<input type="checkbox"/>
Status	<input type="checkbox"/>
Fapiao Title	<input type="checkbox"/>
Taxpayer ID	<input type="checkbox"/>
Company Address	<input type="checkbox"/>
Official Company Phone	<input type="checkbox"/>
Official Bank Name (specify sub-branch)	<input checked="" type="checkbox"/>
Bank Account Number	<input checked="" type="checkbox"/>
Delivery Method	<input checked="" type="checkbox"/>
Delivery Address	<input checked="" type="checkbox"/>
Delivery Phone	<input type="checkbox"/>
Delivery Email	<input type="checkbox"/>

### Select Payment Methods

Allow Online Payment

Allow Payment by Bank Transfer

Bank Transfer Details \*  
Bank transfer

Allow Payment by Check

Check Payment Details \*  
Check details







### Supported Currencies and Cards

US Dollar

Canadian Dollar

Chinese RMB

Add another currency

VISA      

Not all payment methods are available for every currency.  
[Contact us](#) or your administrator to know which currencies are available for which payment methods.

### Refund Policy

Use organization's default policy [?](#)

Refund Policy  
No Refund for Event Ticket

### Finance Settings

Use organization's default finance settings - [Configure](#)

Auto-generate invoices for all event orders automatically

Send invoices to online purchasers automatically

Send receipts for all event payments automatically

### Tax Settings

By default, the below taxes will be applied to all event tickets.

Select a tax

### Fapiao Details

Please understand EventBank does not issue fapiaos for purchases made on the platform. Fapiaos must be issued by your organization.

Fapiao not required

Allow Fapiaos and includes the cost in the ticket price

General VAT Fapiao

Special VAT Fapiao

Allow Fapiaos and make the attendee pay for the additional fapiao fee

### Fapiao Delivery Methods \*

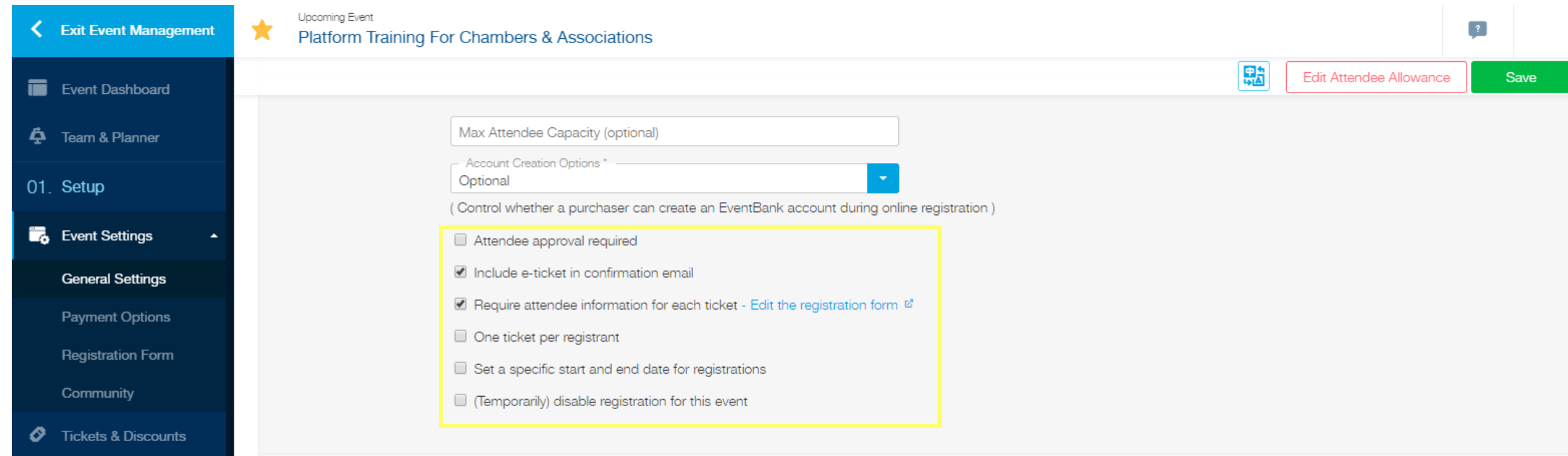
Pickup at the event

Send by mail

Pickup at My Organization's office

# Registration Workflow

- Attendee approval required
- Include e-ticket in confirmation email
- Require attendee information for each ticket
- One ticket per registrant
- Set a specific start and end date for registrations
- (Temporarily) disable registration for this event



The screenshot shows the EventBank interface for managing an event. The top navigation bar includes a back arrow, "Exit Event Management", a star icon, "Upcoming Event", and the event title "Platform Training For Chambers & Associations". On the right, there are icons for help and a notification bell, and buttons for "Edit Attendee Allowance" and "Save".

The main content area displays the following settings:

- Max Attendee Capacity (optional)
- Account Creation Options \*  
Optional
- ( Control whether a purchaser can create an EventBank account during online registration )
- Attendee approval required
- Include e-ticket in confirmation email
- Require attendee information for each ticket - [Edit the registration form](#)
- One ticket per registrant
- Set a specific start and end date for registrations
- (Temporarily) disable registration for this event

The list of checkboxes is highlighted with a yellow border in the original image.

# Attendee Approval Required

Approval check-box in General settings enables each ticket approval

### Edit Ticket

Individual Ticket  Group Ticket

Name \*  
Individual participant

Description  
1 pax whole day ticket

**Require approval**

Show on public event pages


How many tickets are available? (optional)


**⚠ Your registration is awaiting approval.**


### Registration Received

An email has been sent to [ekaterina.vaulina@eventbank.com](mailto:ekaterina.vaulina@eventbank.com). You will be notified again when your registration is confirmed.


Digital Transformation in Print Media Industry Conference

 June 1 & 2, 2019 · [Add to Calendar](#)

 New Jersey, United States · [Get directions on Baidu Maps](#)

 <https://www.eventbank.com/event/digital-transformation-in-print-media-industry-conference-14204/>

[VIEW YOUR REGISTRATION](#) [VIEW EVENT AGENDA](#) [Share Event](#)



## Thank you for submitting your registration request.


You will receive a confirmation email when your registration is confirmed.


**This cannot be used as an event access pass.**


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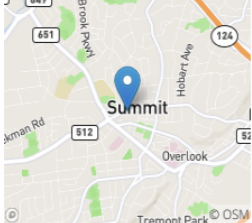
### Digital Transformation in Print Media Industry Conference

by Postmedia

 June 1 & 2, 2019  
[Save to calendar](#) · [View agenda](#)

 Grand Summit Hotel  
570 Springfield Ave, Summit, NJ 07901  
New Jersey  
[Show on map](#)

 <https://www.eventbank.com/event/digital-transformation-in-print-media-industry-conference-14204/>



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Your Order Breakdown Registration ID 369029 Order Date Jun 5, 2019

Item	Payment Status	Amount (CAD)
Individual participant Ekaterina Vaulina	<b>NOT PAID</b>	CS100
<b>Total</b>		<b>CS100</b>

No Refund for Event Ticket

If you have any questions, please contact [ekaterina.vaulina@eventbank.com](mailto:ekaterina.vaulina@eventbank.com)

# Approve Registrations



Only if 'Attendee approval required' is selected in Event settings.

Approval List    Attendee List

Approval List 🔍 ⬇️ ⚙️

Active Requests ▾ All Tickets ▾ All Discounts ▾

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	COMPANY NAME	POSITION	REGISTRATION DATE ▾	ACTIONS
<input type="checkbox"/>	Ekaterina	Vaulina	<a href="mailto:ekaterina.vaulina@eventbank.com">ekaterina.vaulina@eventbank.com</a>	Eventbank	Customer Success Manager	Today at 11:31	⋮

Fast actions for approval lists:

- View Registration, Approve, Decline
- Managing multiple registrations by selecting and approving at once.

**Attention!** Relevant for single/multiple attendee registration for individual tickets

Approval List    7 selected    Approve ▾

Active Requests ▾ All Tickets ▾ All Discounts ▾ Decline

<input checked="" type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL
<input checked="" type="checkbox"/>	Khulan	Sainbayar	<a href="mailto:khulan@eventbank.com">khulan@eventbank.com</a>
<input checked="" type="checkbox"/>	Hou	Chris	<a href="mailto:chris.hou@eventbank.com">chris.hou@eventbank.com</a>
<input checked="" type="checkbox"/>	Justin	Laufer	<a href="mailto:justin.laufer@eventbank.com">justin.laufer@eventbank.com</a>

# Group Registration

- One ticket with the capacity of multiple attendees
- When the information is not available for additional attendees yet, choose prefill option

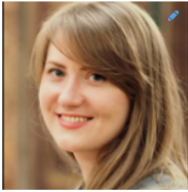
SELECT PACKAGE      ATTENDEE INFORMATION      CONTACT DETAILS      REQUEST RECEIVED

Complete the information below for each attendee. If you have any questions, please [contact us](#).

Group participation 5 Attendees

Attendee #1

Use my EventBank account information



First Name \*

Last Name \*

Email \*

Phone

Company information

Company

Industry

Position

Don't yet know the names of your attendees? Use this attendee's information for all attendees below.

Attendee #2

Attendee #3

Attendee #4

Attendee #5

[BACK](#) [CONTINUE](#)

# Group Approval


Approve/Decline multiple attendees at once

[Approval List](#) [Attendee List](#)

## Approval List



[Active Requests](#) [All Tickets](#) [All Discounts](#)

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	COMPANY NAME	POSITION	REGISTRATION DATE	ACTIONS
<input type="checkbox"/>	Ekaterina	Vaulina	<a href="mailto:ekaterina.vaulina@eventbank.com">ekaterina.vaulina@eventbank.com</a>	Eventbank	Customer Success Manager	Today at 12:40	

### Group Registration Approval

**Approve or Decline attendees**  
The following attendees have registered together. Please review this group request.

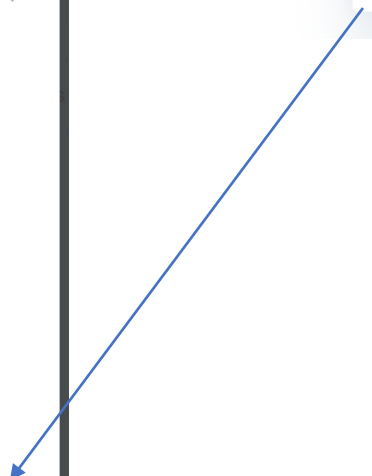
Approve or Decline All

**Group participation - 5 Attendees**  
Ekaterina Vaulina  
Customer Success Manager at Eventbank

[ekaterina.vaulina@eventbank.com](mailto:ekaterina.vaulina@eventbank.com)  
+86 13681430842

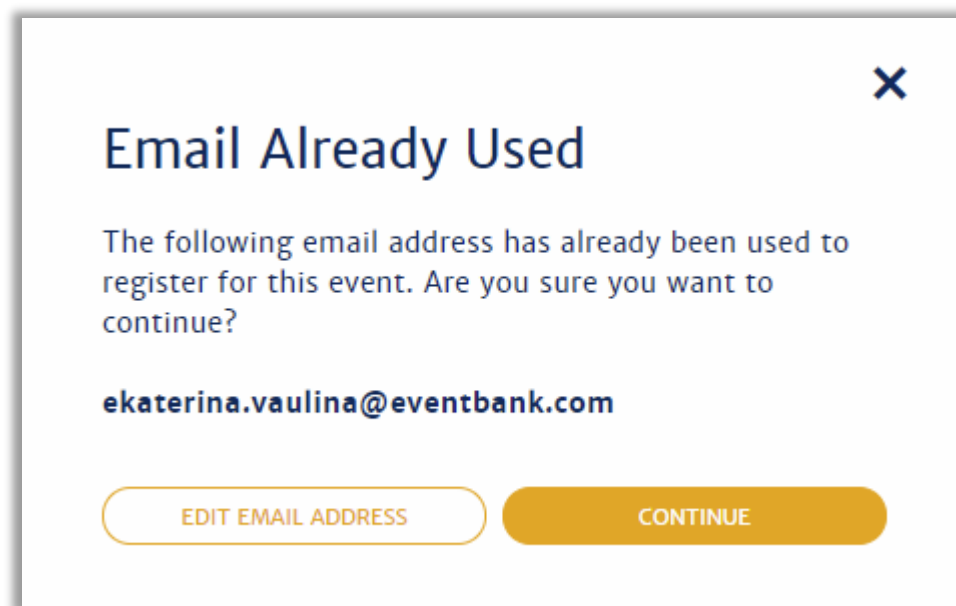
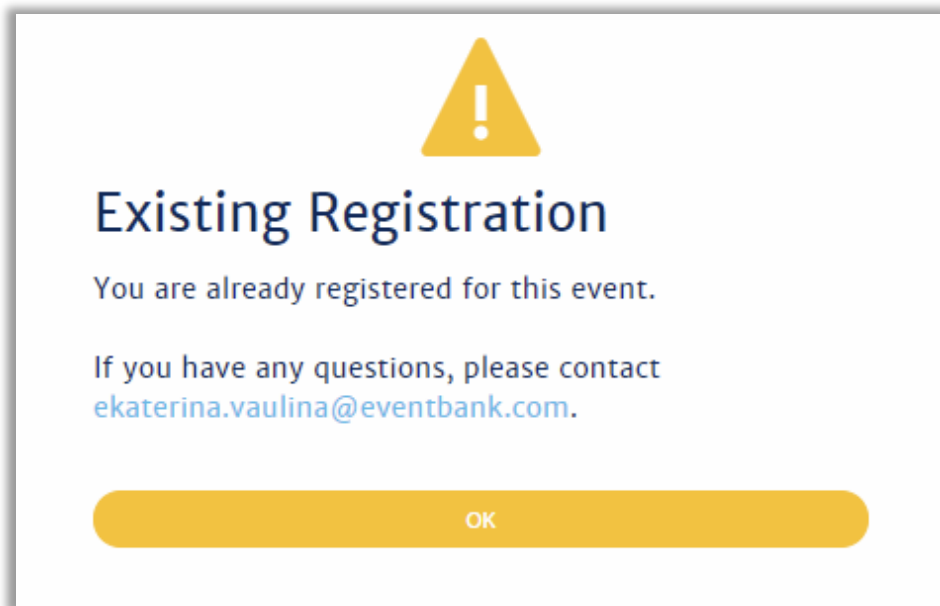
Disable email notifications for this action

- [View Registration](#)
- [Group Approval \(5 attendees\)](#)



# One ticket per registrant

- One ticket check-box in General settings enables each ticket settings
- When the option is not enabled there is still a warning for an already existing registration





# Require attendee information for each ticket

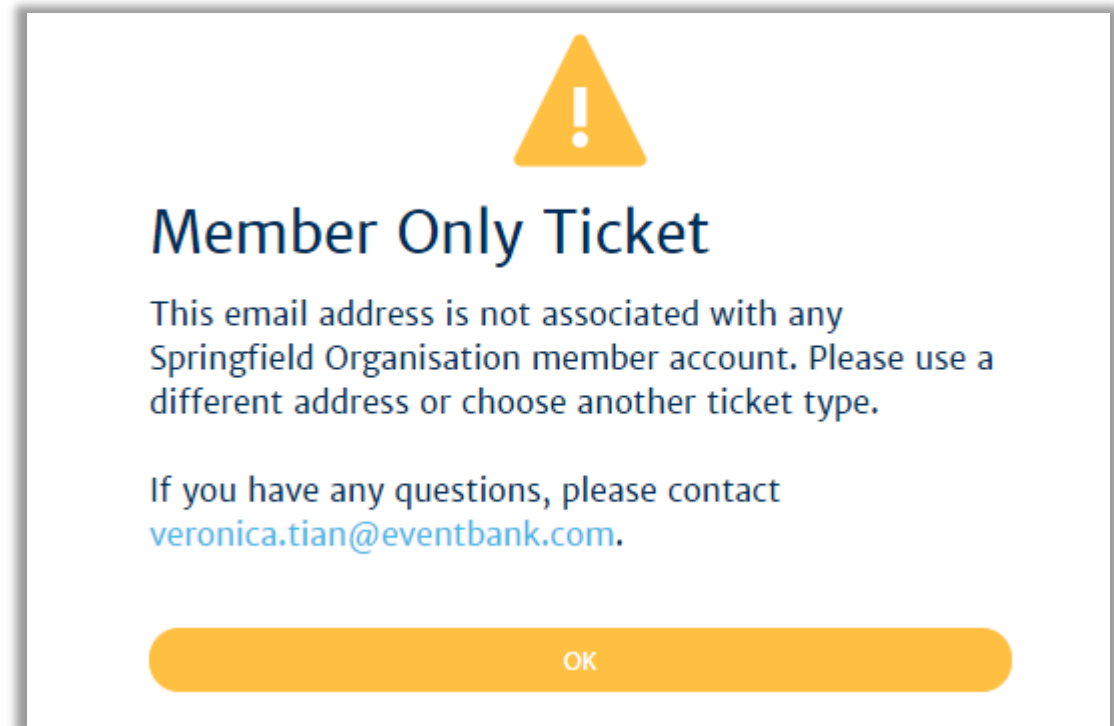


Option is required to:

- Enable registration form and allows to collect attendee details
- Check if attendee is a member for member-only tickets

Member-only ticket:

- Active Members
- Members in Grace period



# Switching Ticket Types



- Can switch when:
- Ticket is not yet 'Paid'
- Ticket is Door Price
- Ticket is Free

Cannot switch:

- Different currencies
- To free ticket during approval

New ticket with an updated invoice will be sent to the recipient. The system notification can be disabled for this action.

5 results filtered by [Attendee Status](#) [Reset filters](#)

TICKET ID #	EMAIL	FIRST NAME	LAST NAME	TICKET NAME	PAYMENT STA	
00005-BEFXX9	<a href="mailto:hjean@enlightened.com">hjean@enlightened.com</a>	Howard	Jean	VIP tickets / Standard Price	Not Paid	<a href="#">Change Ticket Type</a> <a href="#">Resend Ticket</a> <a href="#">Download Ticket</a> <a href="#">↗</a> <a href="#">Cancel Ticket</a> <a href="#">View Registration</a> <a href="#">↗</a> <a href="#">View CRM Profile</a> <a href="#">↗</a> <a href="#">Resend Registration Notice</a>
00004-26J8OH	<a href="mailto:pedram.bagherabadi@eventbank.com">pedram.bagherabadi@eventbank.com</a>	Pedram	Bagherabadi	Early bird test / Standard Price	Not Paid	
00003-YH9IMK	<a href="mailto:connor.curry@eventbank.com">connor.curry@eventbank.com</a>	Connor	Curry	Early bird test / Standard Price	Not Paid	

# Edit Registration Amount



Generate invoice then you will be able to add discount, extra fee, additional items  
Change the amount to be paid and resend the invoice/payment notice

Registration ID #: 369091  
Registration Date: Today at 13:39

## Attendee Information



**Ekaterina Vaulina**   
✉ ekaterina.vaulina@eventbank.com



## Registration Contact



**Ekaterina Vaulina**  
✉ ekaterina.vaulina@eventbank.com



## Order Information

Total: HKD 250 (Not Paid)



- Generate Invoice
- Add Payment
- Comp Registration

ITEM		
Member Rate Ekaterina Vaulina		HKD 250
	Total	HKD 250
	Amount Paid	0
	Balance Due	HKD 250

# Edit Invoices

Edit price, discount, tax, add item, save and resend invoice



Download PDF Resend Save

▲ All invoice editing should be done carefully and communicated to the recipient.

Origin	Status	Amount	Amount Paid	Balance Due
Event Registration - Testing_Breakfast seminar	Open	HKD 250	HKD 0	HKD 250 <a href="#">+ Add Payment</a>

**Recipients**

[Ekaterina Vaulina](#)

Search CRM companies

**Billing Address**

Address

Country/Region

Province/State

Postal Code/Zip Code

City

**Invoice Details**

Invoice Number: INV000005

Currency: Hong Kong Dollar

Issue Date: 2019-06-05

Due Date: 2019-07-05

**Items**

ITEM	AMOUNT (HKD)	EDIT
Member Rate Ekaterina Vaulina	HKD 250	
Total	HKD 250	
Amount Paid	0	
Balance Due	HKD 250	

[+ Add Item](#)

### Edit Item

VIP tickets  
Khulan Sainbayar

Item Description

Price (CNY) \* 100

Discount % 10

Select a tax

Cancel Save

# System Notifications



Who? receives which? email notifications if the attendee and the registration contacts are different?

In case of approval attendee will **not** receive a ticket.

Also, attendee will **not** receive a ticket if it's not paid.

The Attendee








Event ticket

The Registration Contact (Payer)






Event ticket, Invoice & Receipt

## Attendee Information

	<b>Khulan Sainbayar</b> <span>Member</span> 	
	Eventbank	
	khulan@eventbank.com	
Preferred Language:	English	
Visible in Event Community:	No	
Terms Opt-in:	Yes	
Ticket ID #:	00006-YUKTRZ	
Ticket Name:	VIP tickets	
Ticket Type:	Standard Price	
Price:	RMB 100	
Payment Status:	<b>Not Paid</b>	

## Registration Contact

	<b>Sol Han</b>	
	Eventbank	
	sol.han@eventbank.com	

# Thank You

