Membership Workflow

Efficiently Manage Your Membership Applications and Renewals

EventBank

Membership Workflow

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Manage Membership workflow

- ✓ Fapiao Delivery Method
- ✓ Membership Renewal Notifications
- ✓ Edit Membership Applications
- ✓ Edit Membership Renewal

Membership Version Update

- ✓ Draft Your Membership Update
- ✓ Schedule Your Membership Version

Membership Profile

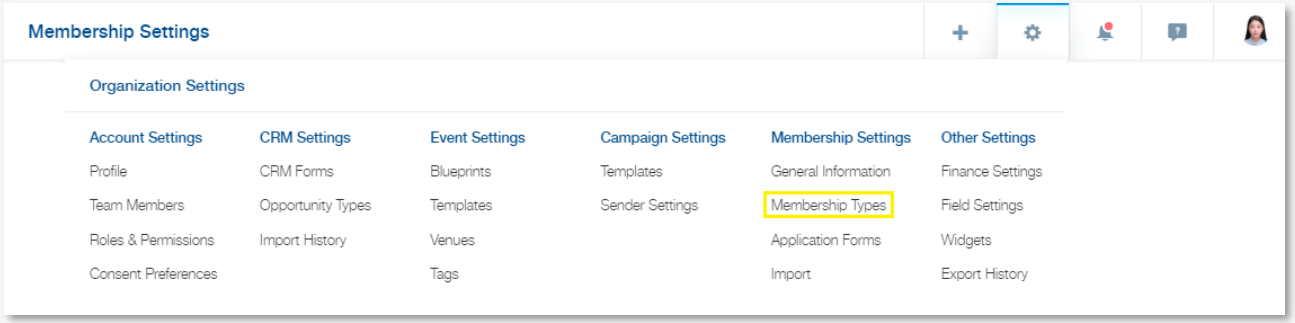
- ✓ Corporate Membership vs Individual Membership
- ✓ Member Experience

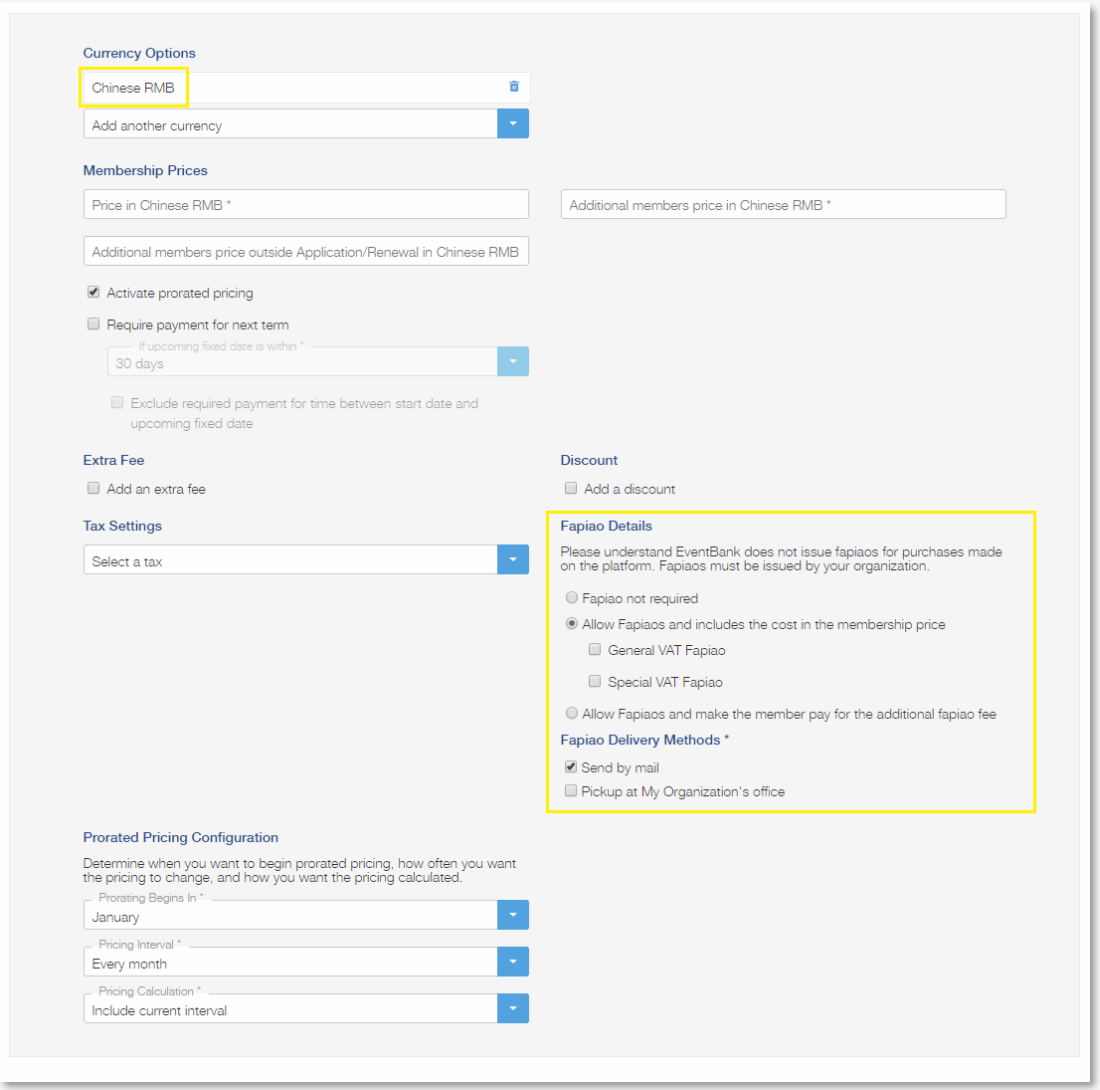
Fapiao Delivery Methods

Fapiao Delivery Methods is able to adjust by each Membership Type, and in the Price Configuration.

When the Chinese RMB is enabled, Fapiao Details will be available, and now you are able to select which deliver methods would you like to allow your member to choose. The available options are:

1. Send by mail
2. Pickup at office





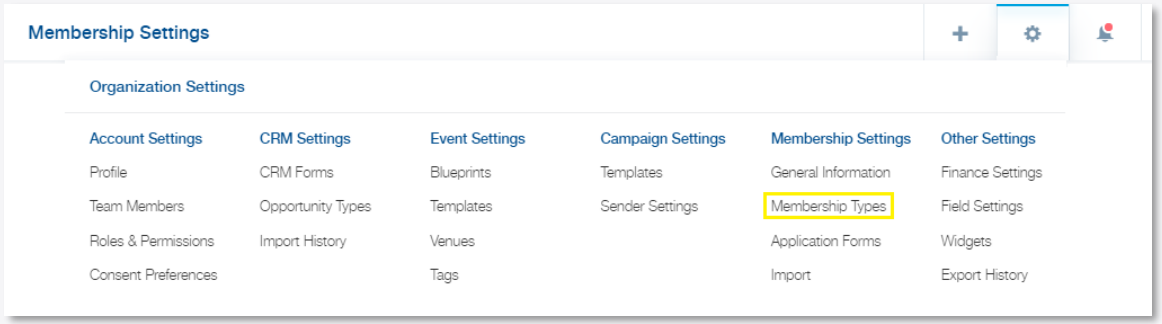
Membership Notification Settings

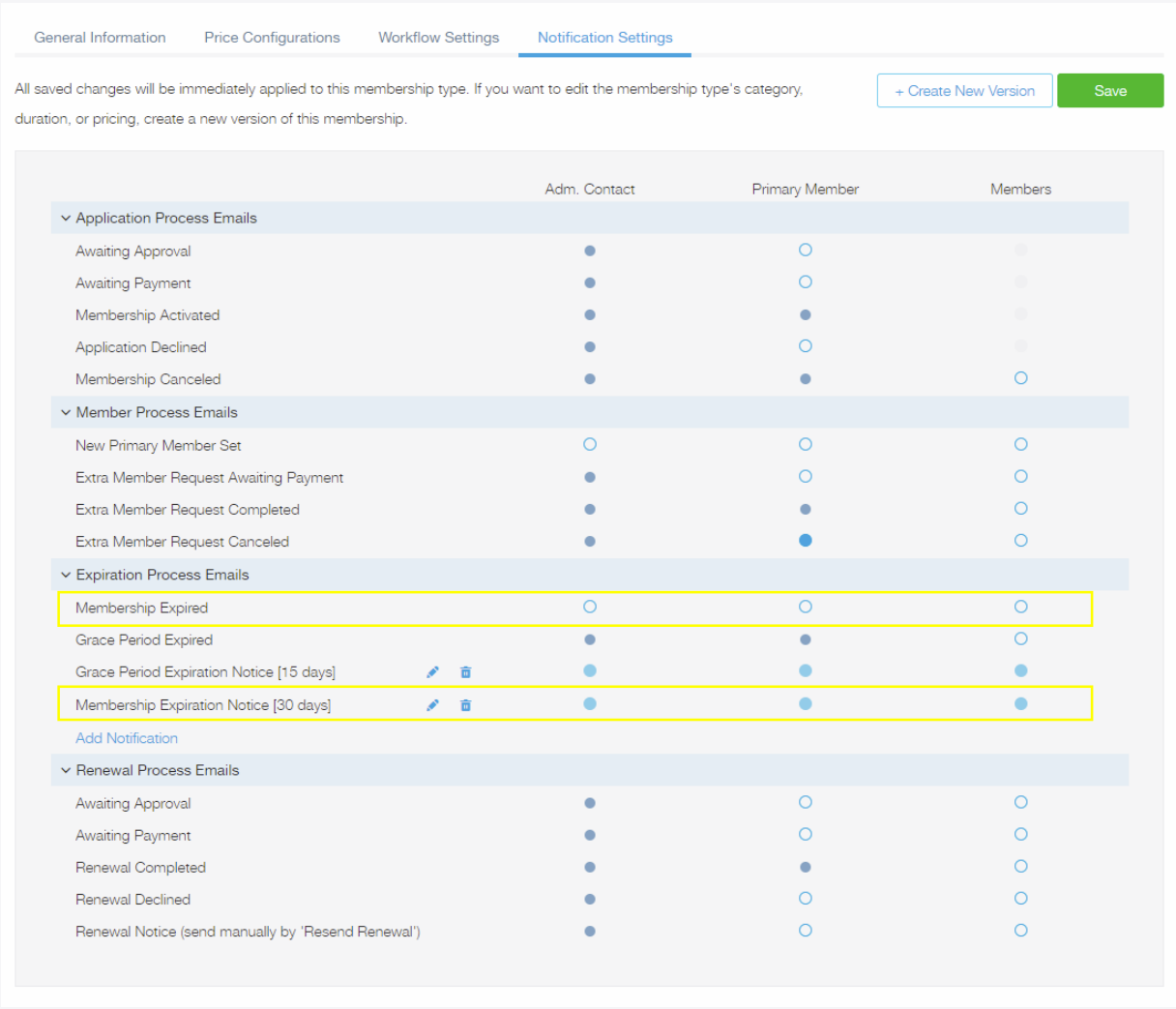
To manage the notifications for the membership workflow, click the gear icon and select “Membership Types” in the Organization Settings

In the Membership Types list, please enter the respective membership type’s edit page.

Go to “Notification Settings” to adjust the membership notification.

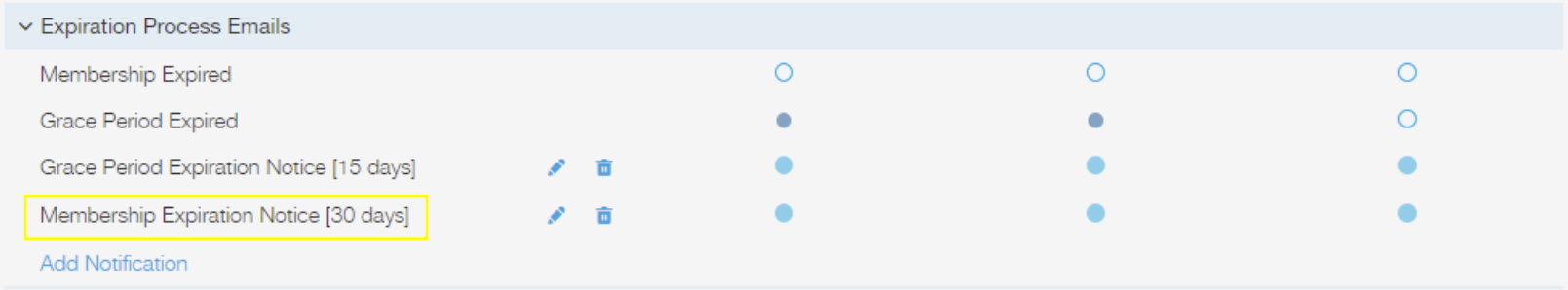
Note: If the membership type does not have the grace period, you will only be able to see Membership Expired and add the Membership Expiration Notice.

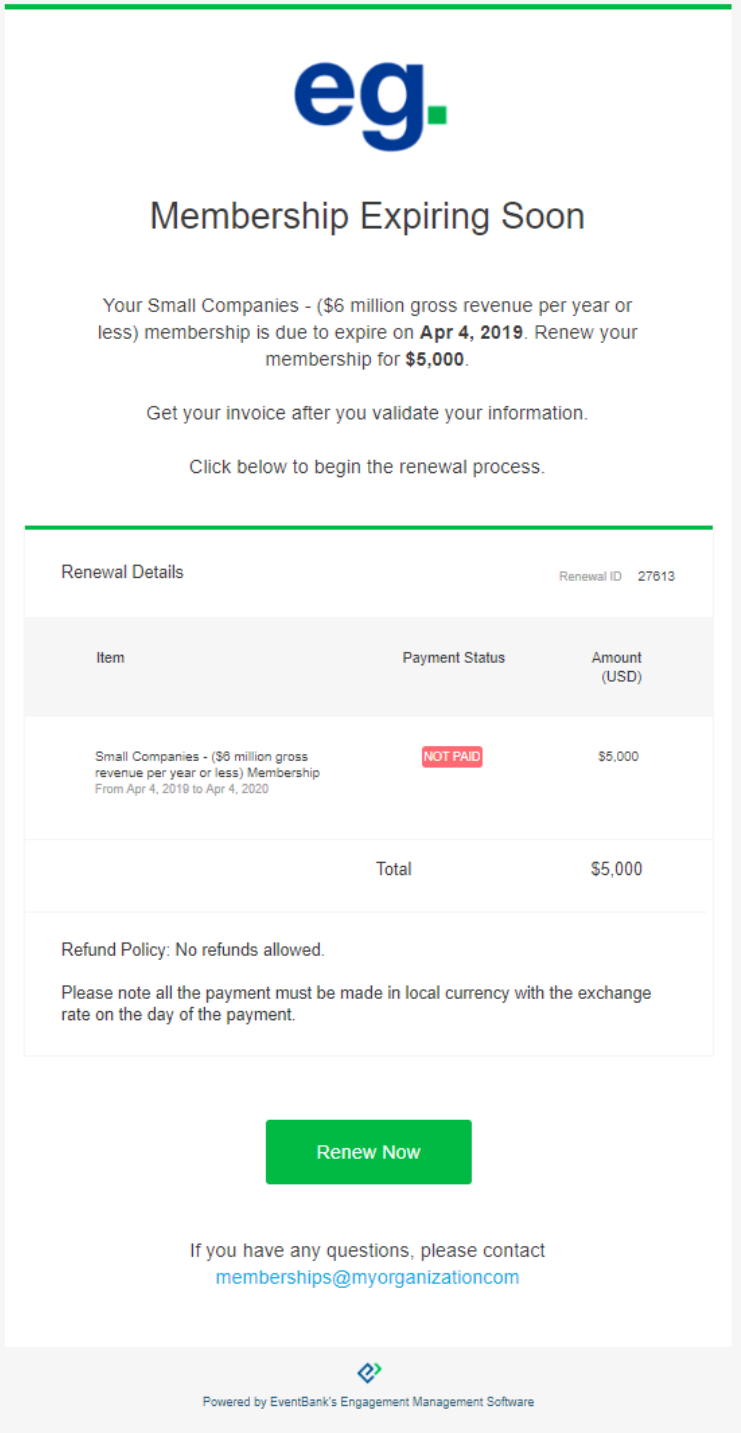




Membership Notification Settings

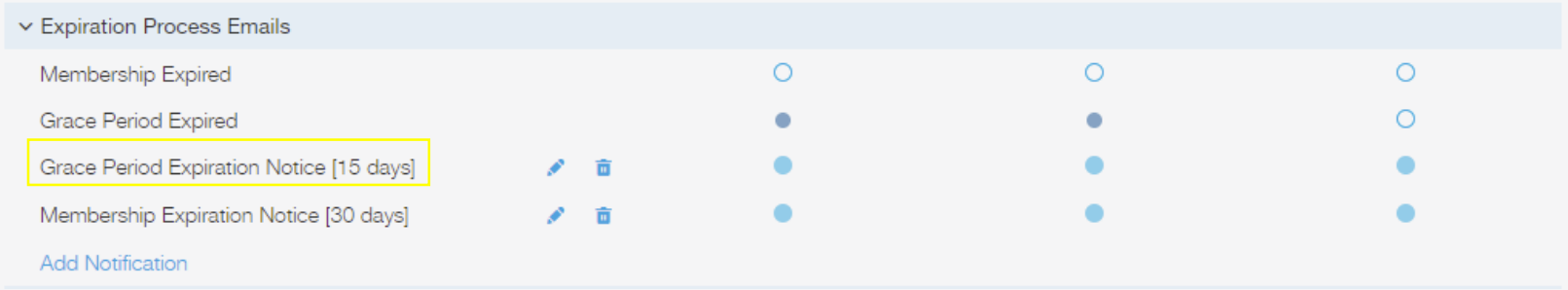
Membership Expiration Notice

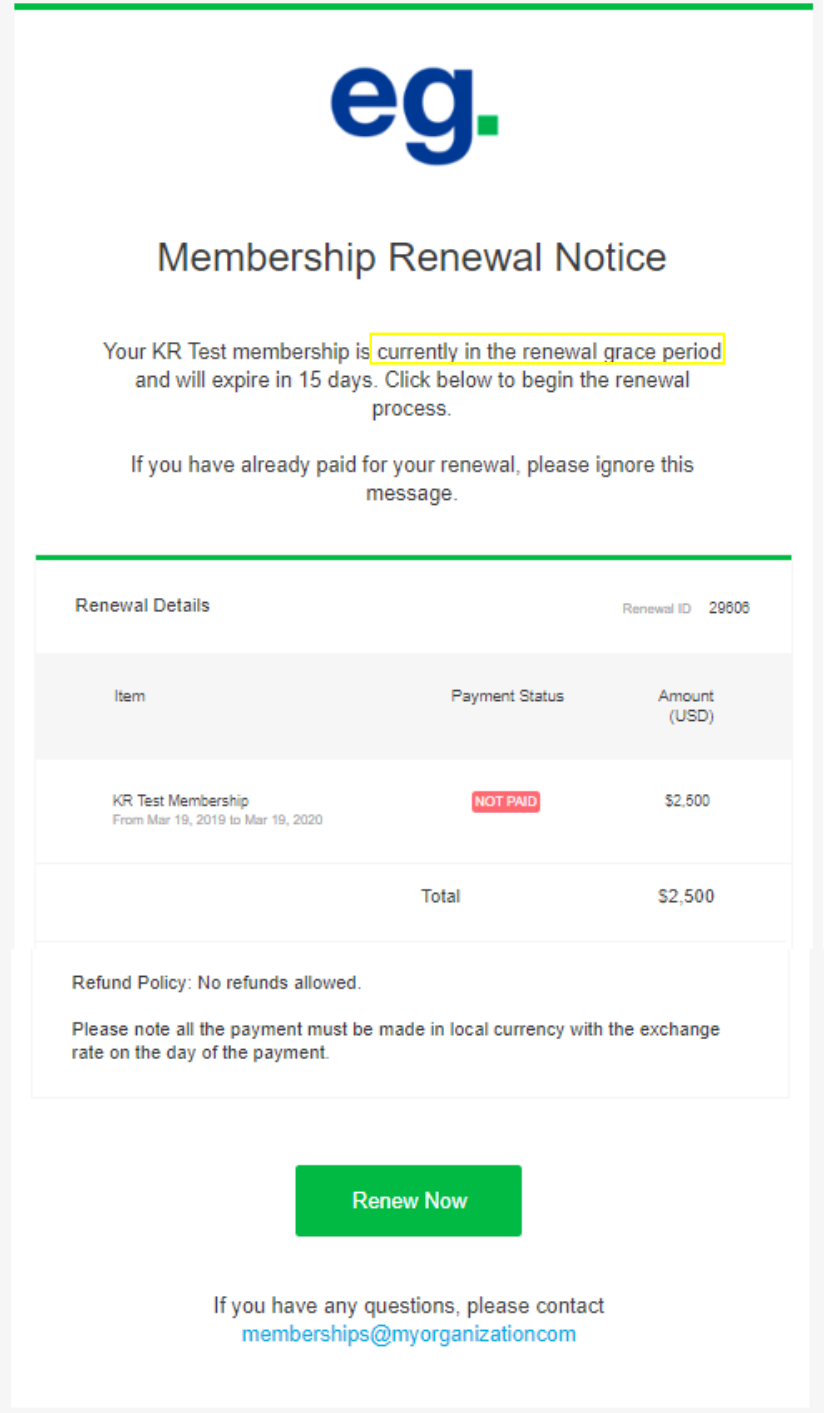




Membership Notification Settings

Grace Period Expiration Notice

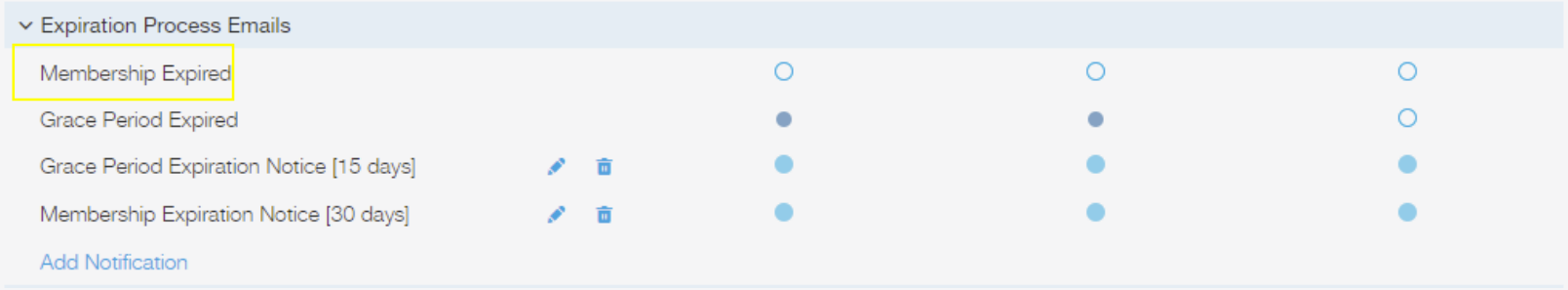


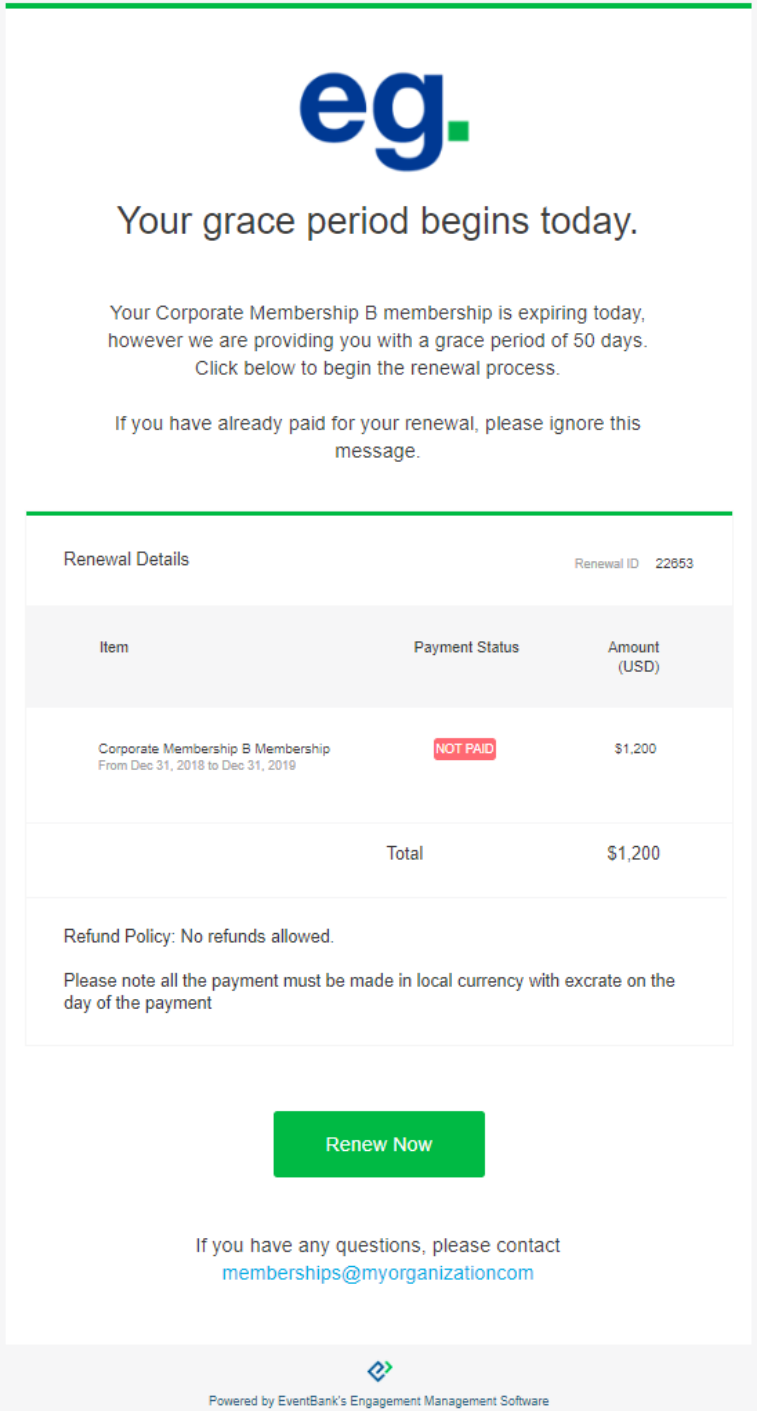


Membership Notification Settings

Membership Expired w. Grace Period.

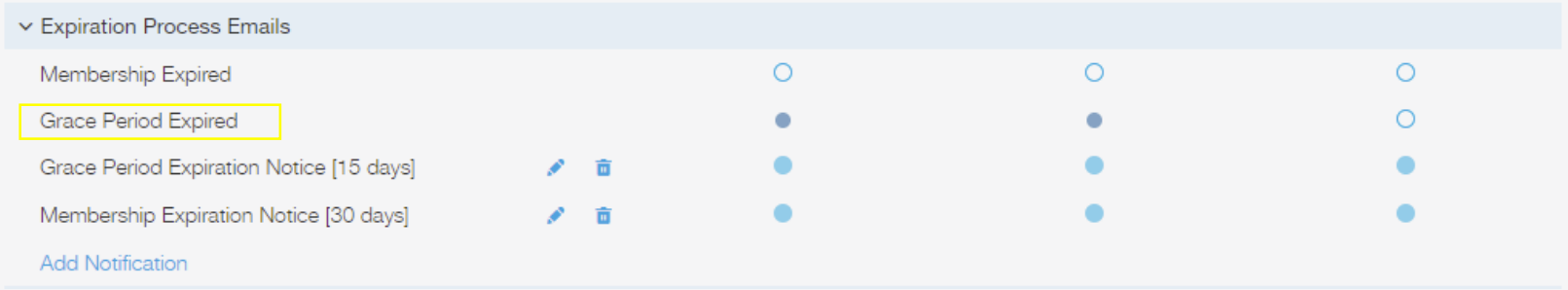
This notification can be disabled, only if you provide the grace period.

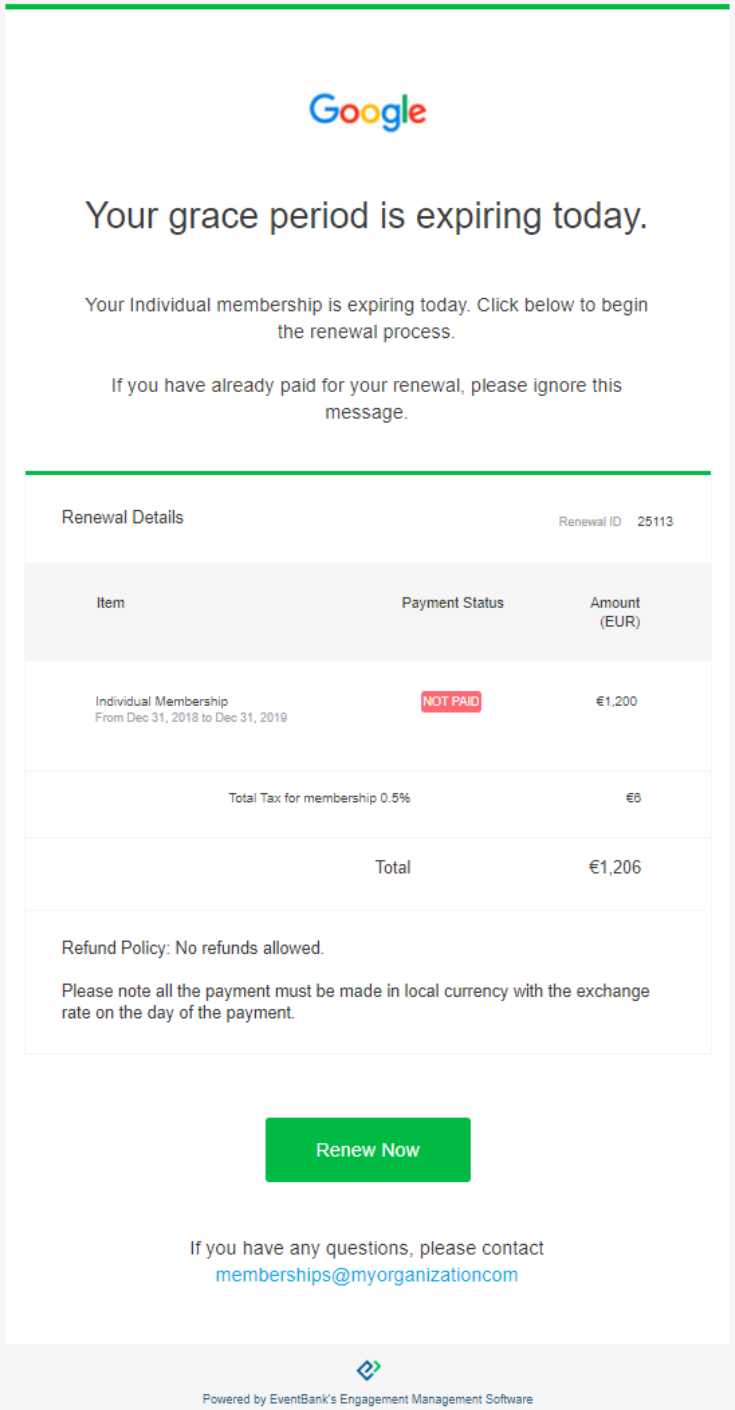




Membership Notification Settings

Grace Period Expired





Membership Notification Settings

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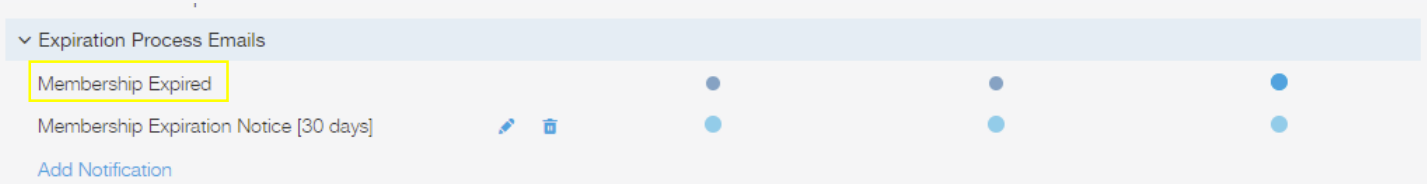
Membership Expired w/o Grace Period



eg.

Your membership is due to expire today

Please click below to begin renewal process.

Renewal Details — Renewal ID 14151

Item	Payment Status	Amount (EUR)
Sol_test Membership From Aug 31, 2018 to Aug 31, 2019	NOT PAID	€1
	Total	€1

Renew Now

If you have any questions, please contact memberships@myorganizationcom

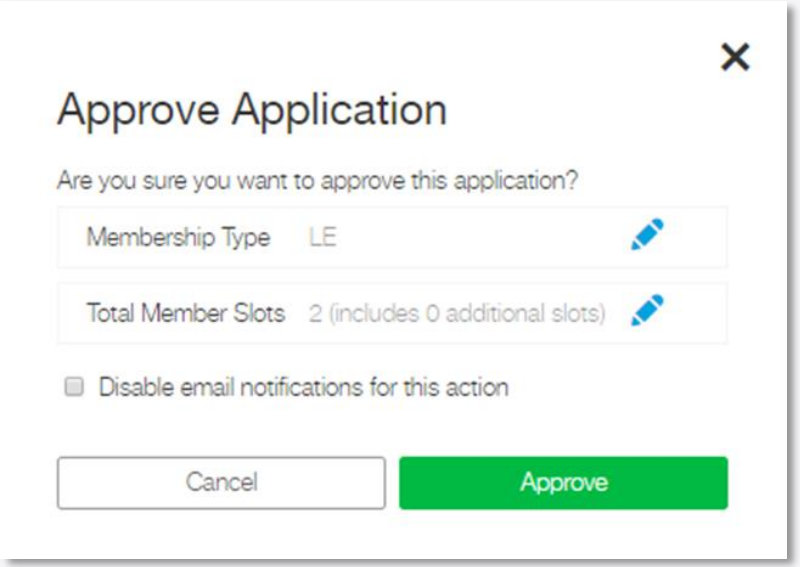
Manage Membership Applications

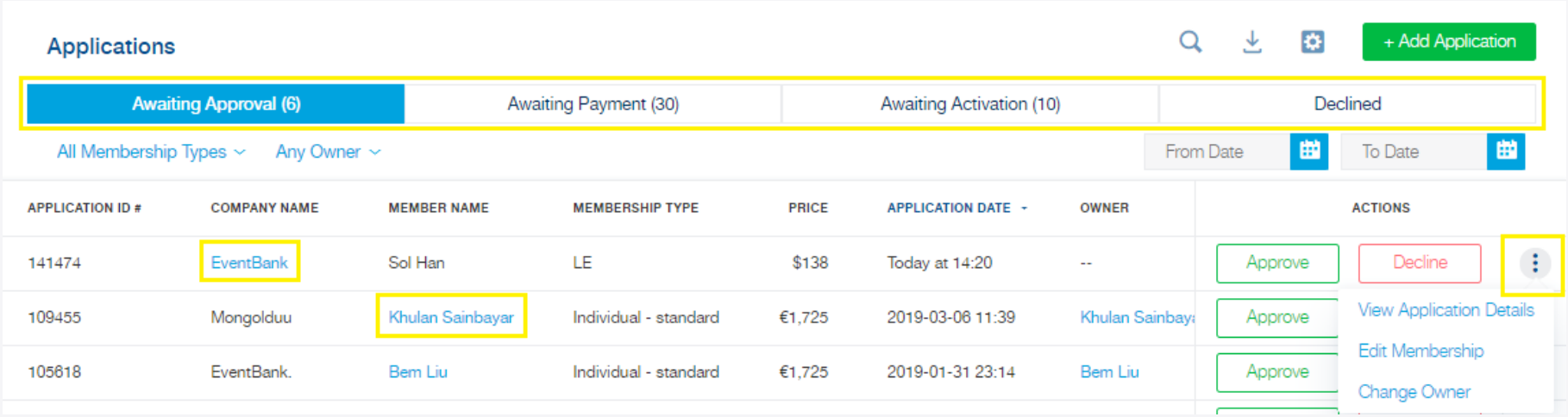
Awaiting Approval: When the membership type has application approval stage.

Awaiting Payment: When the member hasn't completed the payment process, or they have selected the offline payment method. This stage will assist you to confirm the bank transfer, cash, or check account and update the payment status.

Awaiting Activation: When the membership type has post-payment approval stage.

Declined: When you Decline the member application during the application stage, all declined member will be listed in Declined tab

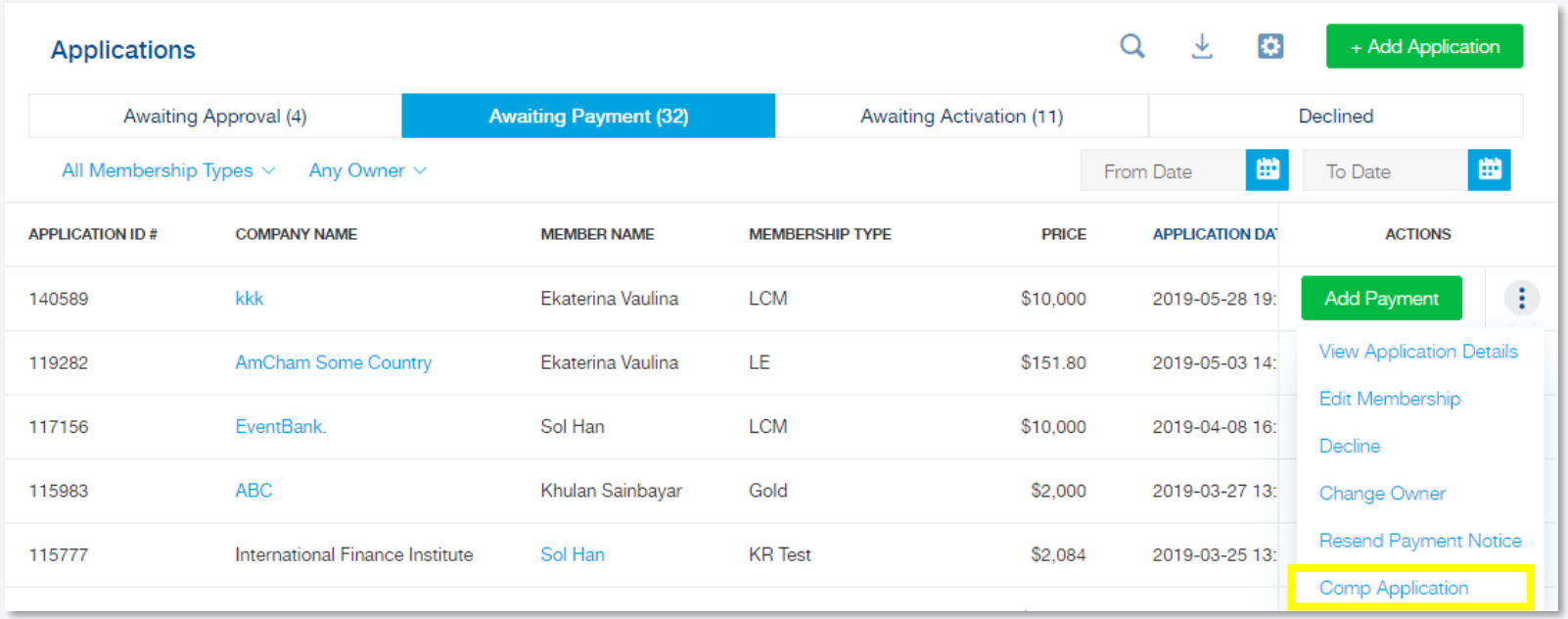


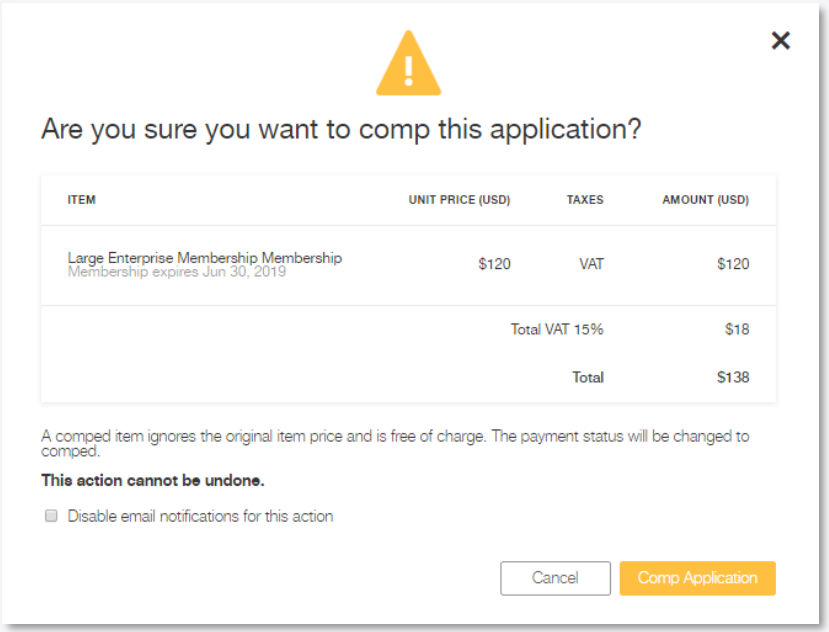


During the approval, and add payment process, you have the option to "Disable email notification for this action"

Manage Membership Applications

To provide the complimentary membership for the new members, go to Membership – Workflow Manager - Applications – Awaiting Payment stage and click the 3 dots icon and select Comp Application.



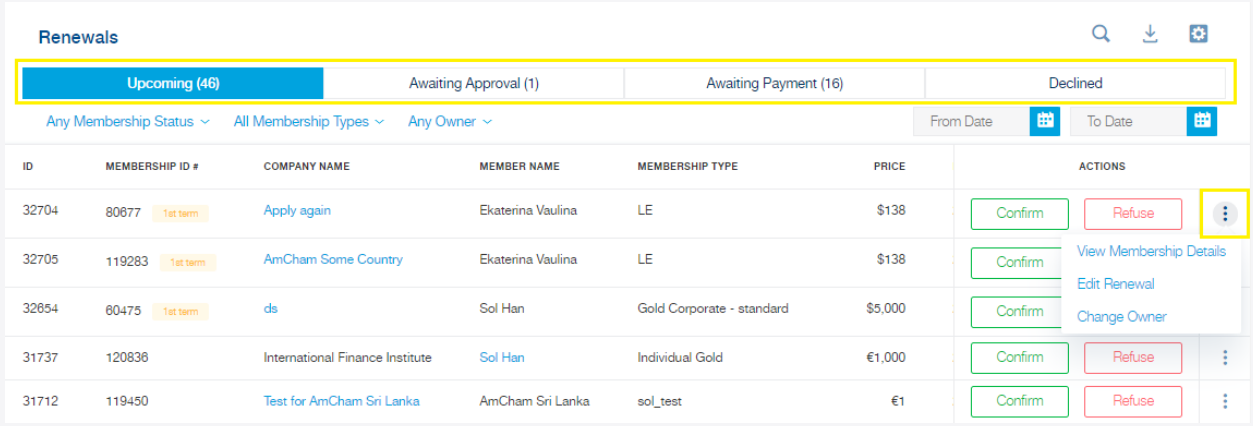


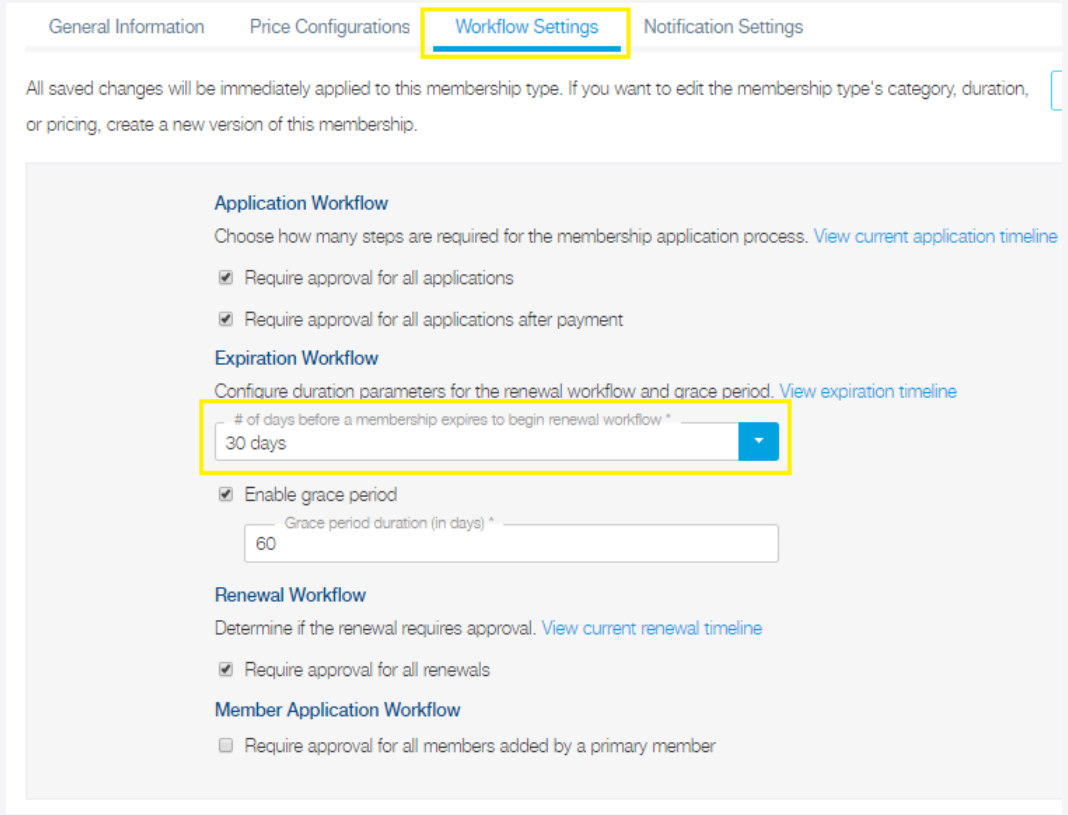
Manage Membership Renewals

Upcoming Renewal is the list of your current member who is in the renewal process. And the members will be listed in Membership – Workflow Manage – Upcoming according to the Membership Type's setting.

This information can be found in Membership Types – Workflow Settings.

Additionally, you will be able to edit this option without scheduling the membership version update. And only the members, who is not yet listed in Upcoming, will be applied to the new setting.

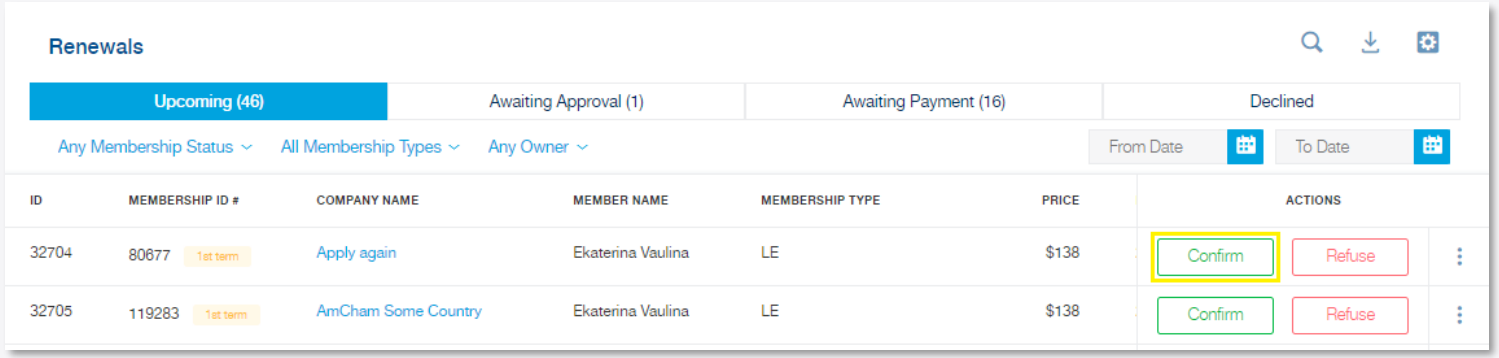


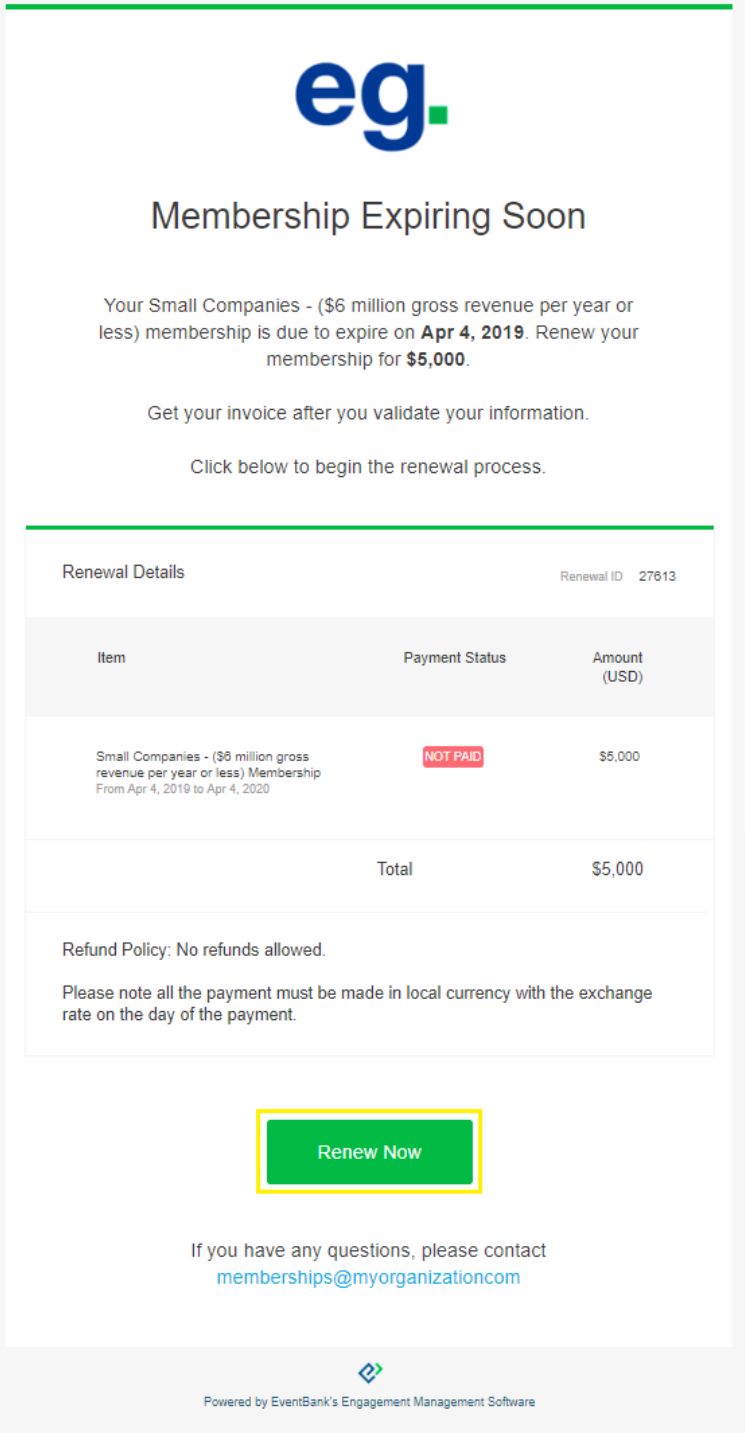


Manage Membership Renewals

Upcoming list's Confirm button is the same action as when the members click on the "Renew Now" button via Membership notifications; Membership renewal system emails.

This action will make the membership renewals to go on next step, such as Awaiting Approval or Awaiting Payment. If you do not have any notification added, you need to confirm to update your member's renewal payment status or complete the renewal process.

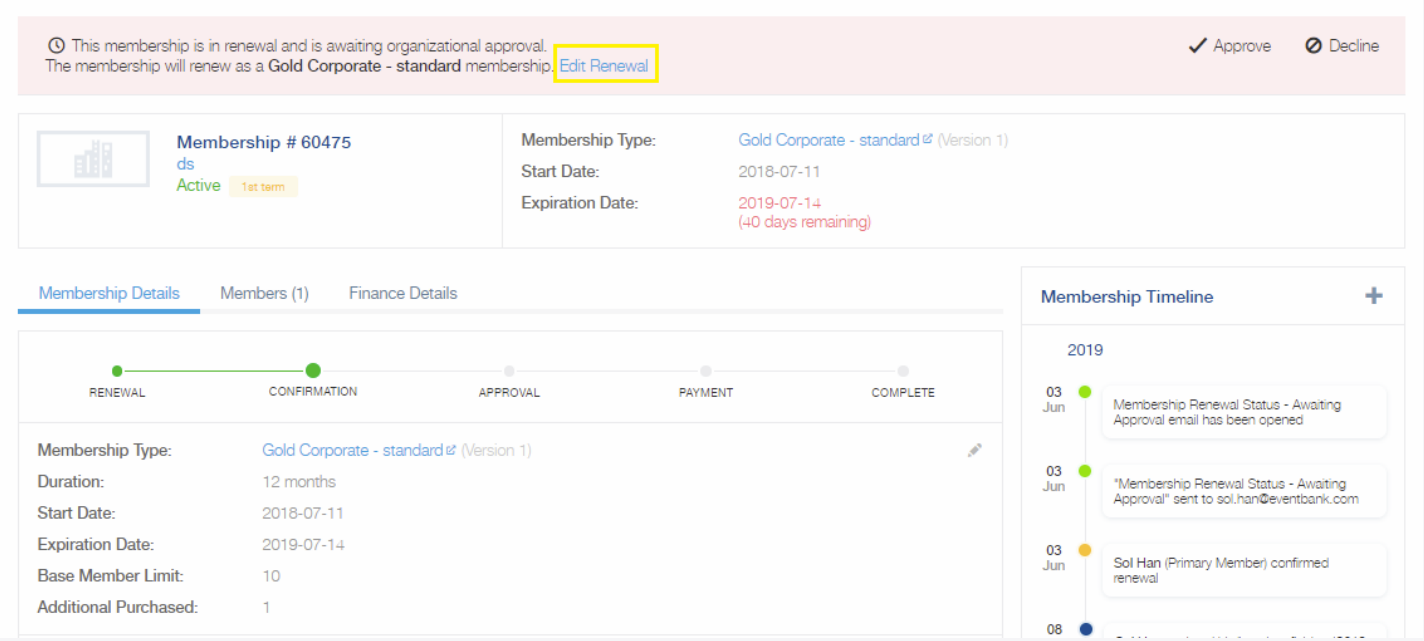


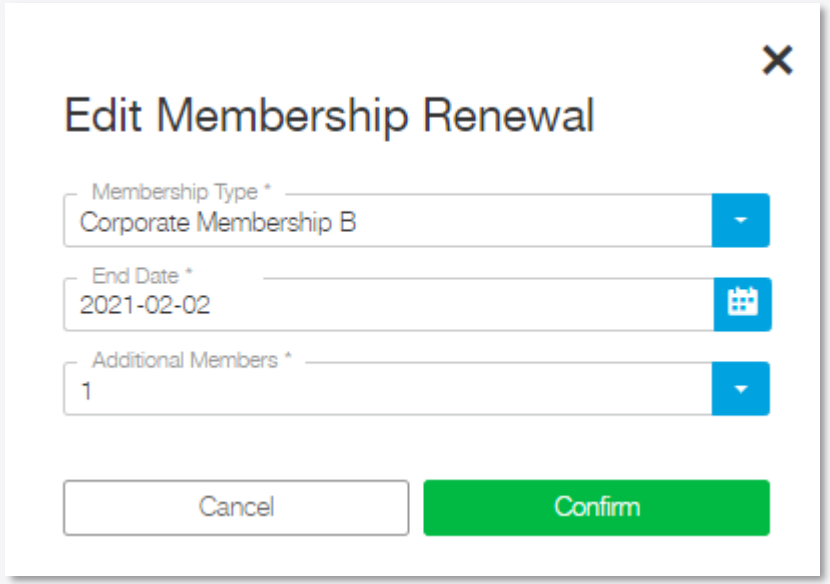


Manage Membership Renewals

Often, the organization requires to edit the members' membership type, when they are no longer categorize in the current membership type they're in. Therefore, in the EventBank platform, you are able to edit the Member's basic configuration including the Membership Type or End date. Notably, after you have edit the Renewal information. You may not find the updated information from their membership profile, as the profile stands for the current membership information.

Notably, the Membership type cannot be changed from Individual into Corporate, from Corporate into Individual.





Manage Membership Renewals

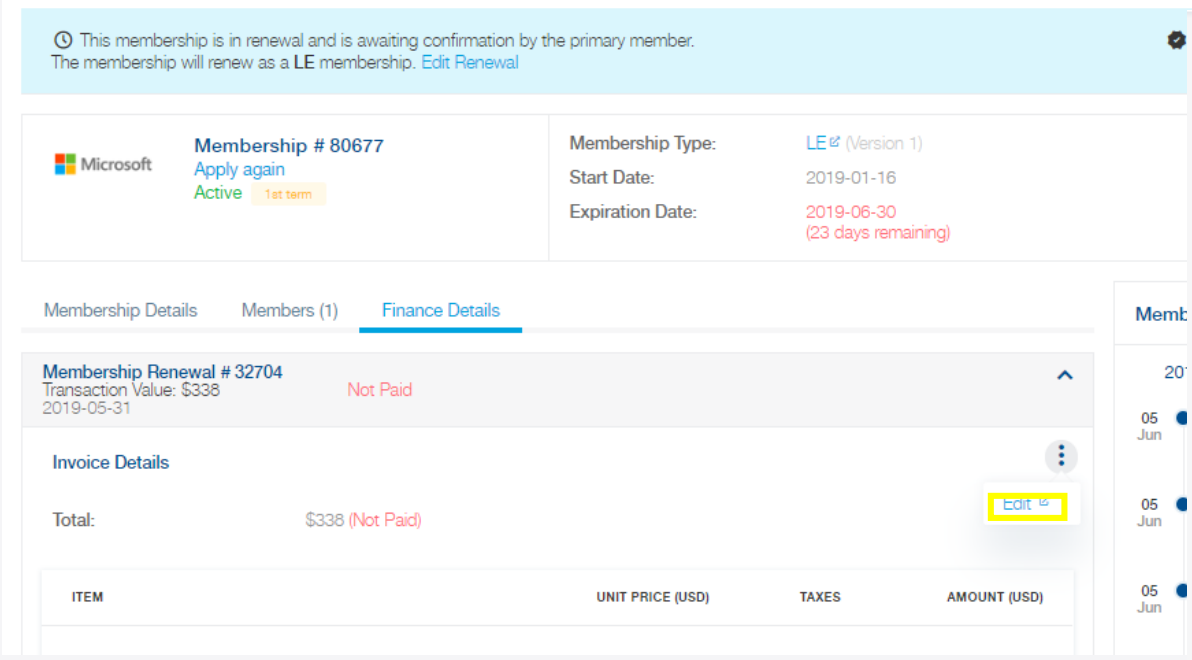
When you need to only edit one member's application or renewal price, what we suggest is to:

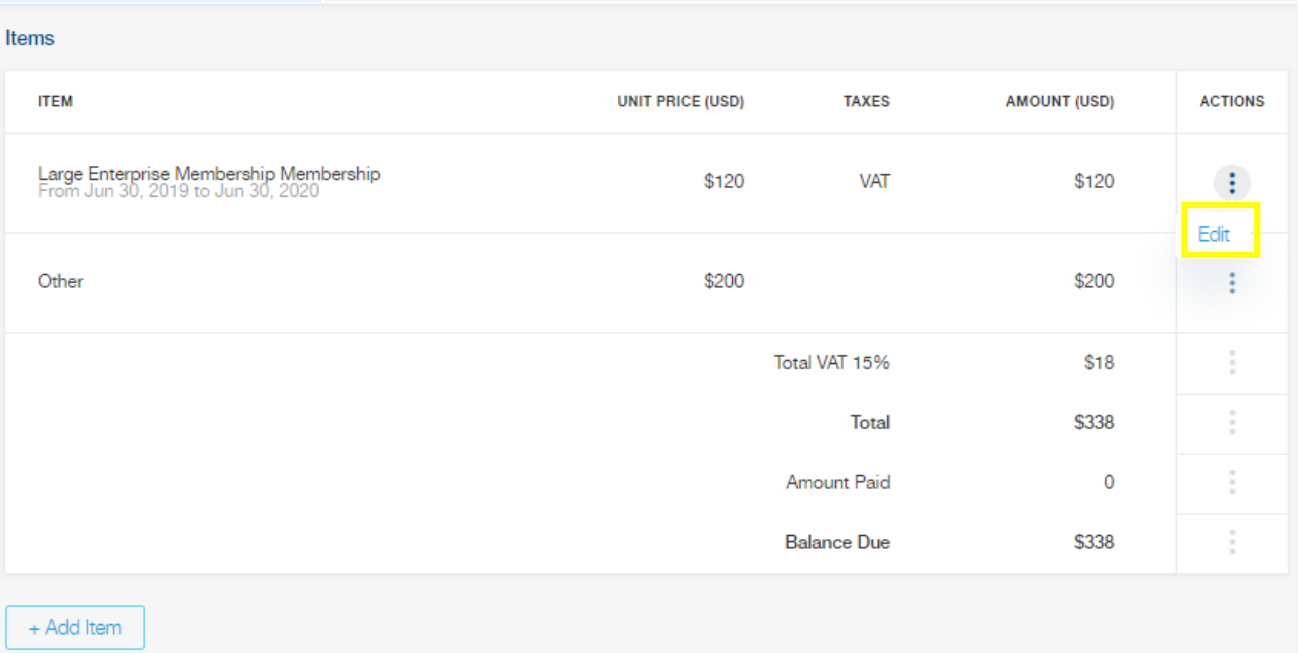
Go to Membership Profile – Finance Details
Click the 3 dots icon – Edit

After that you will be redirected to associated invoice page.

In this page, you will be able to edit the original item or able to add additional items, including the discount or additional charges.

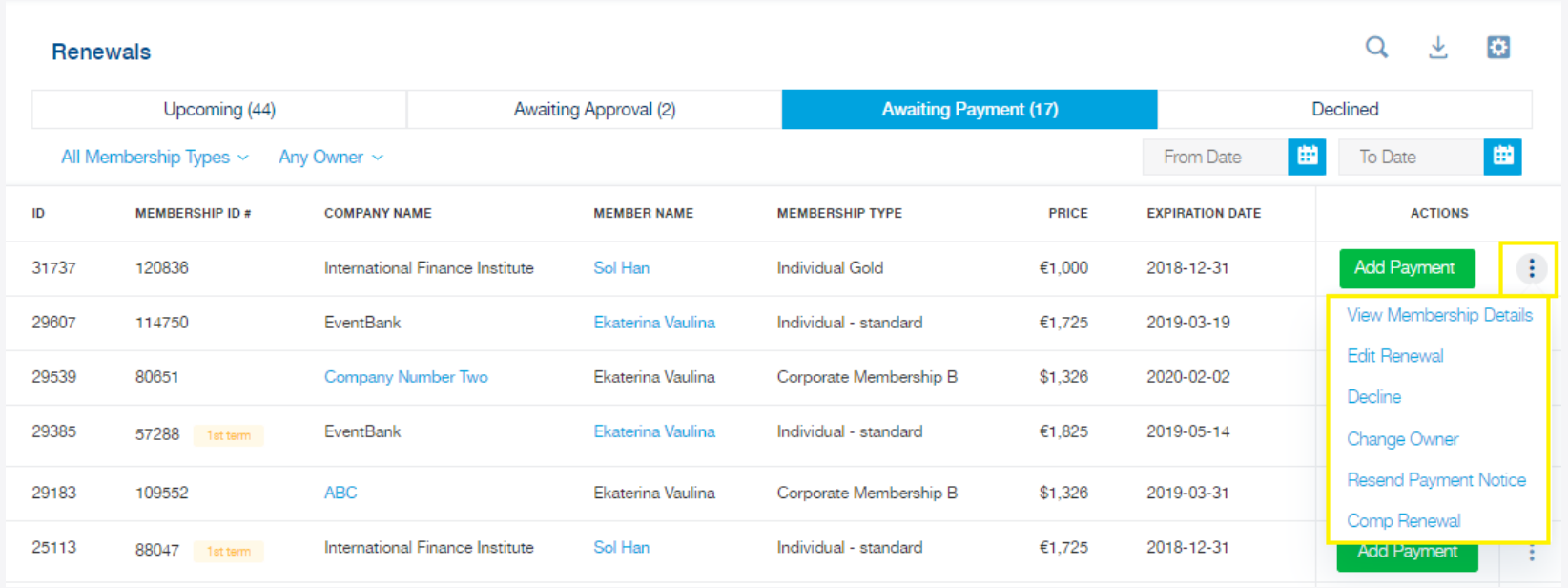
However, the currency cannot be changed.

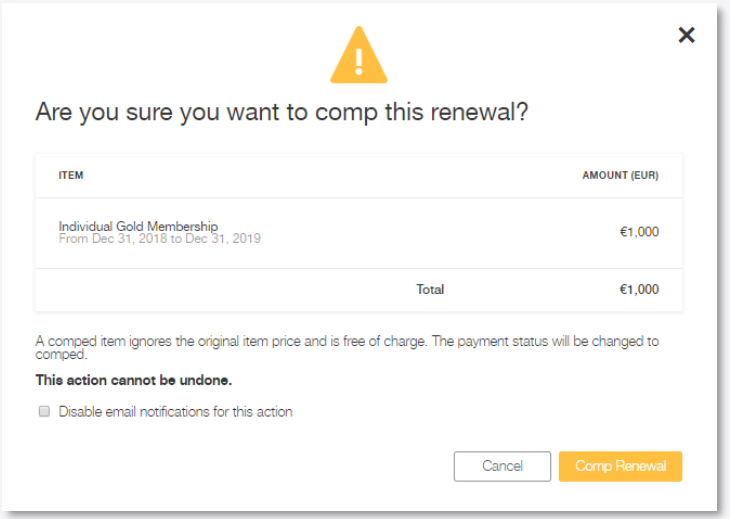




Manage Membership Renewals

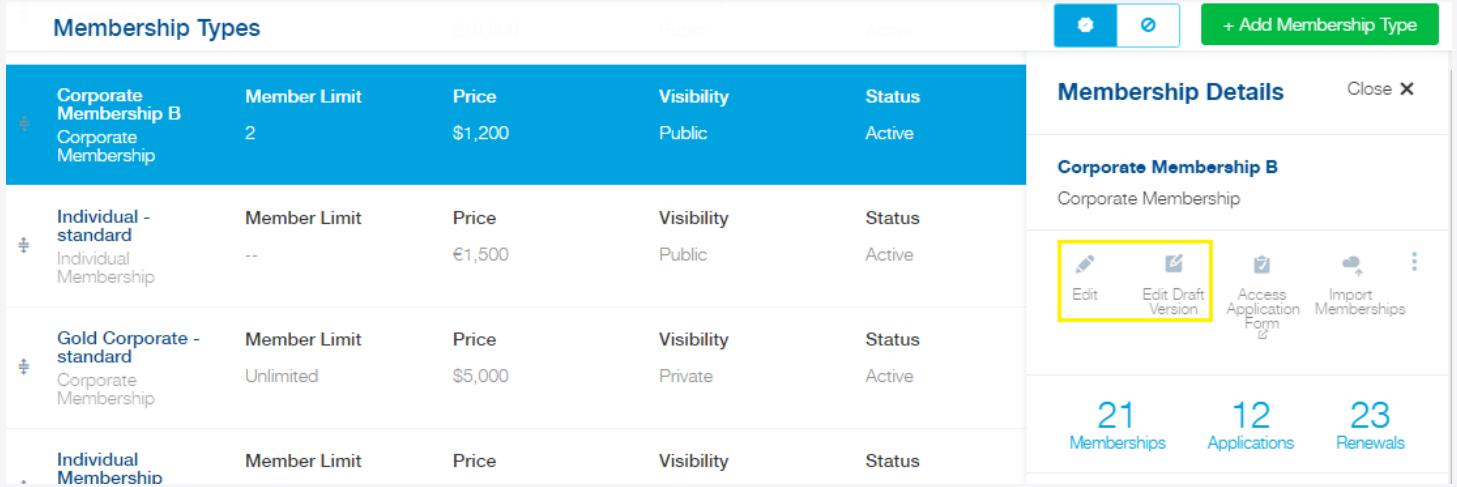
To provide the complimentary membership for the current members, go to Membership – Workflow Manager – Renewals - Awaiting Payment stage and click the 3 dots icon and select Comp Renewal.

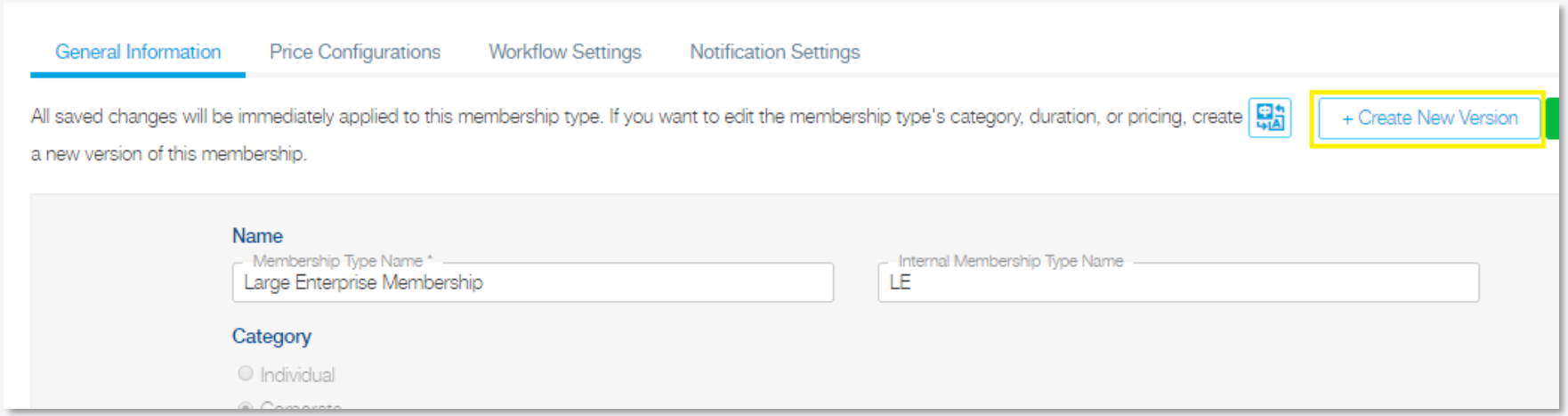




Membership Version Update

To update the Membership type's Setting, please go to Membership types – Click on the membership type's name – Go to Edit or Edit Draft Version(this option will only be available, if you already created the New Version but not yet scheduled it.



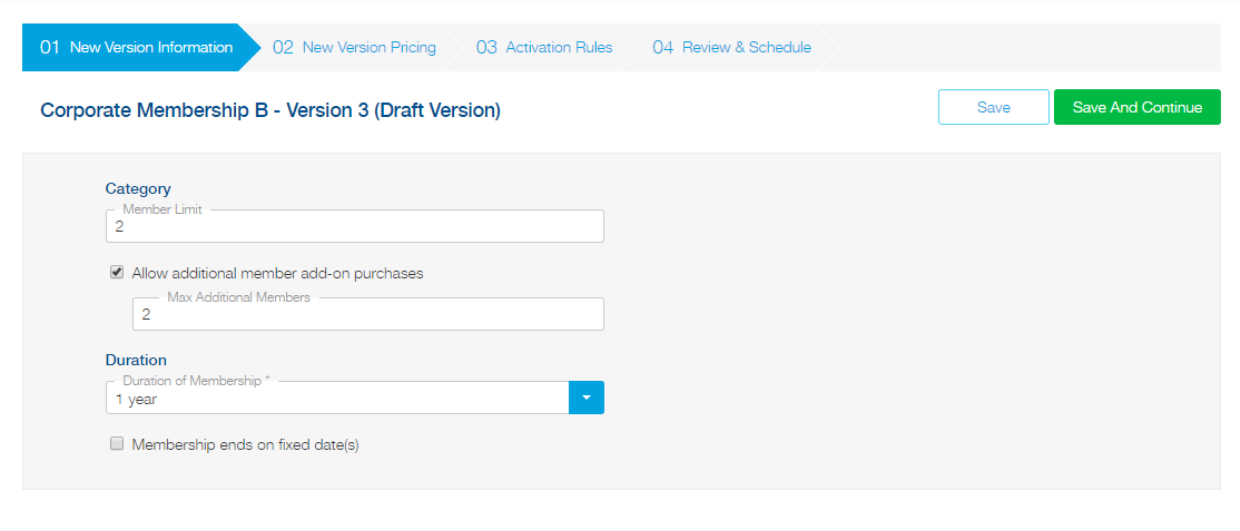


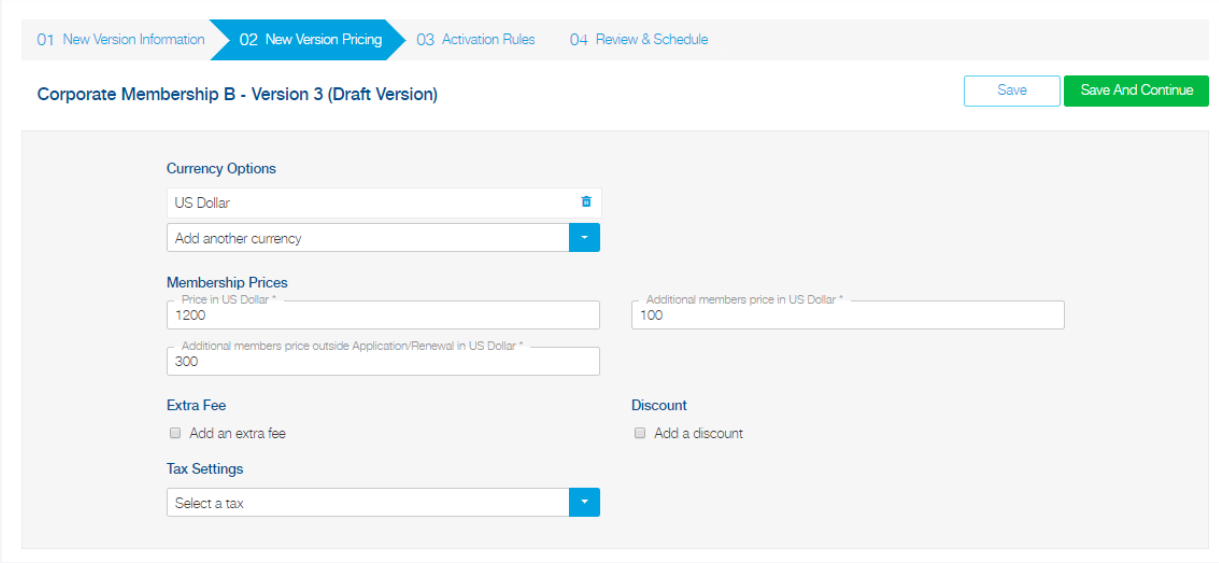
Membership Version Update

After click on “+Create New Version”, you have 4 stages to schedule the membership type update.

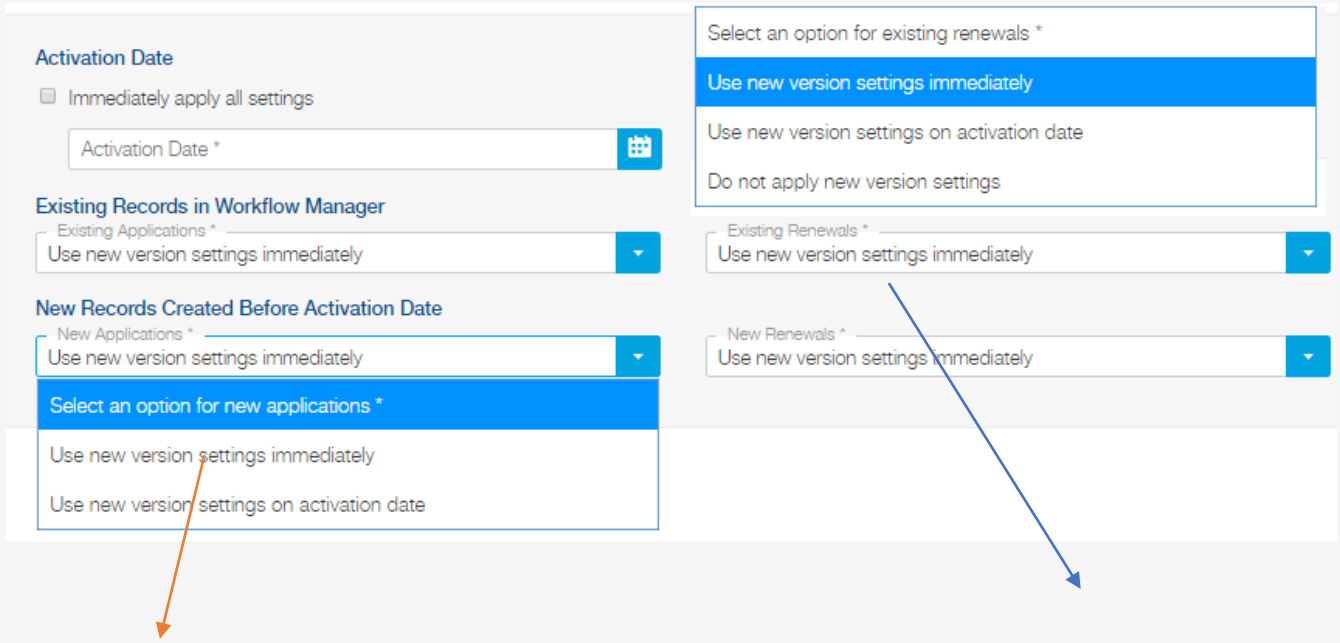
1. New Version Information: Adjust the Member limit(corporate membership), allow add-on purchase and edit the additional member’s number, also you can adjust the Membership duration and enable the Membership ends on fixed date.

2. New Version Pricing: Here you will be able to change, add the currencies, adjust the price of the membership, including the extra fee and discount, and tax item.

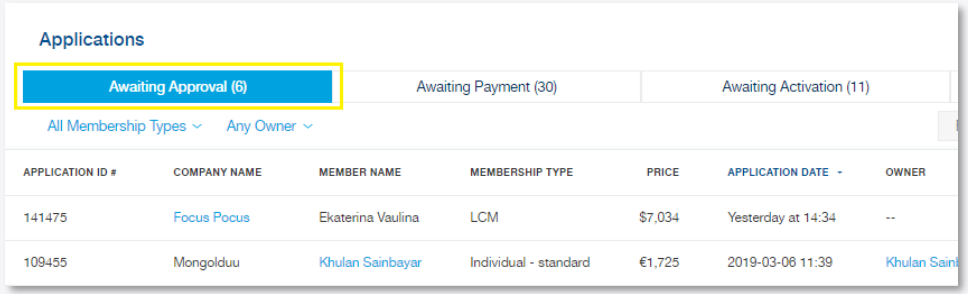


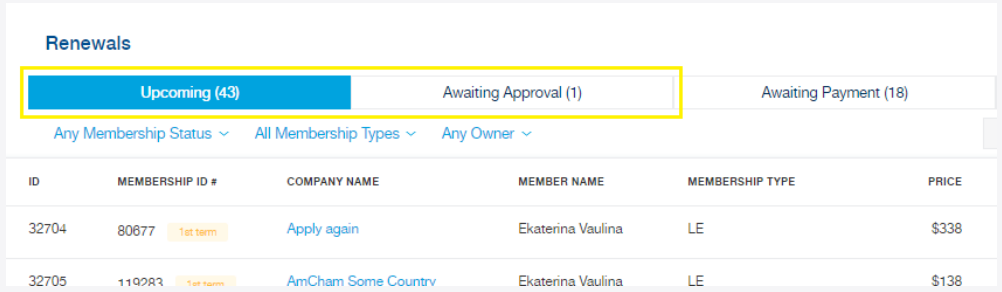


Membership Version Update – Activation Rules



1. Existing Applications: Membership – Workflow Manager – Applications – Awaiting Approval
2. Existing Renewals: Membership – Workflow Manager – Renewals – Upcoming & Awaiting Approval
3. New Applications: Potential Members, who has not submitted the applications yet.
4. New Renewals: Current Members, who has not listed in Upcoming yet.





Membership Version Update

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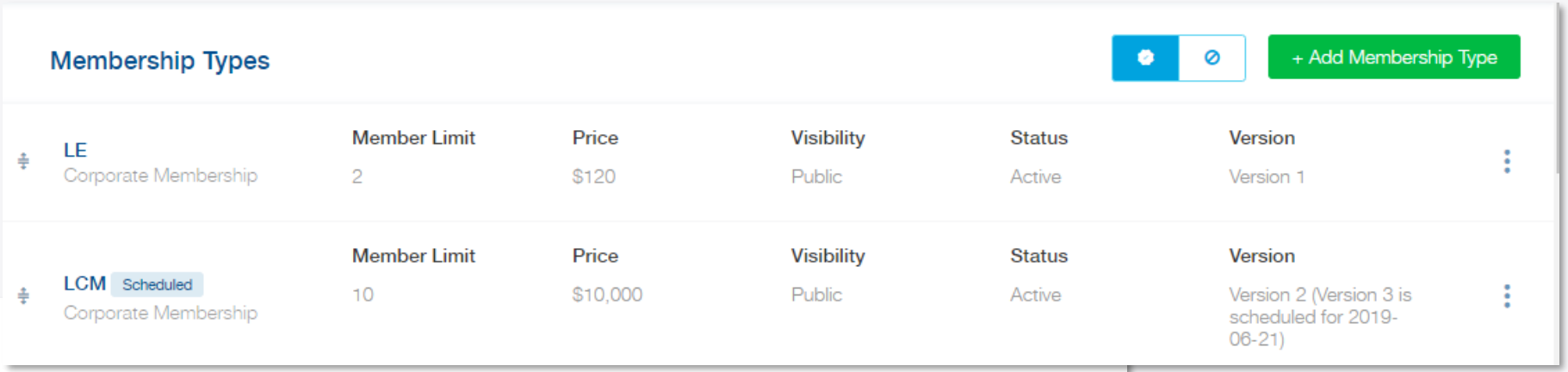

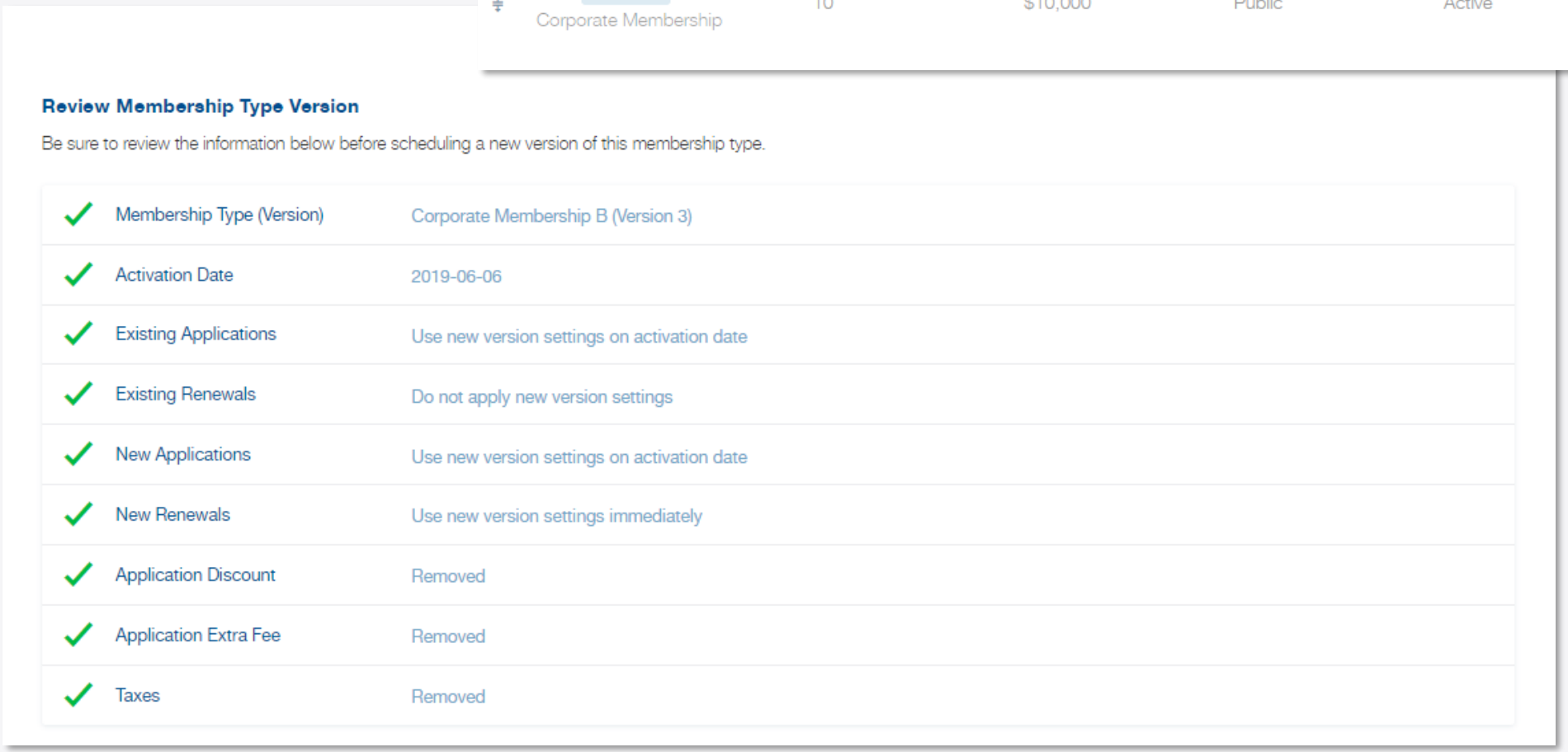

Membership Version Update

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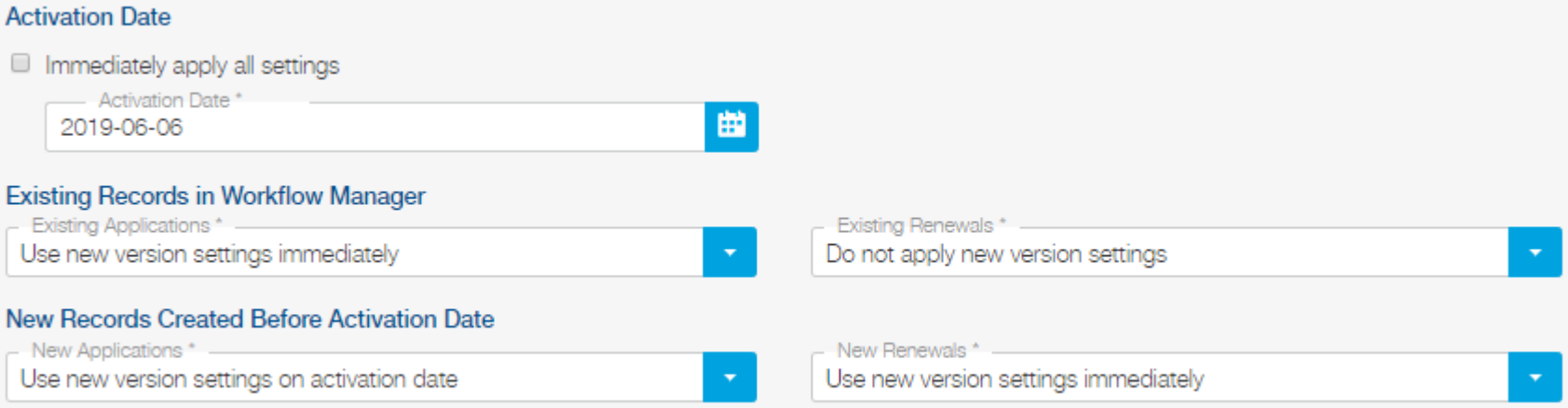
Examples for Version Update, Who will be applied with this setting!



<New Applications>

If Company A joins on

- 2019/06/05: Current price
- 2019/06/06: New price

<New Renewals>

If Company B's Renewal process starts on

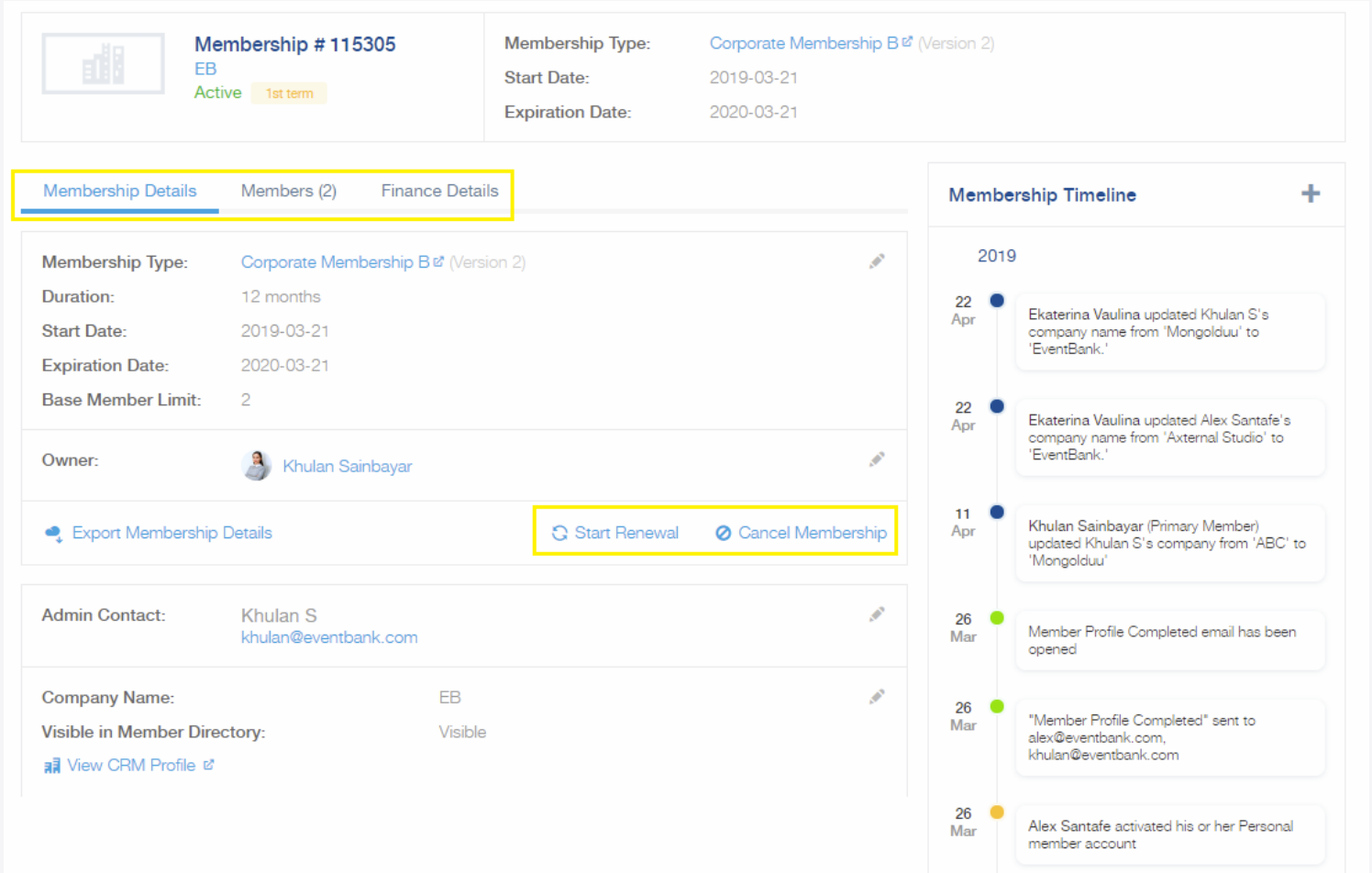
- 2019/06/05: New price
- 2019/06/06: New price

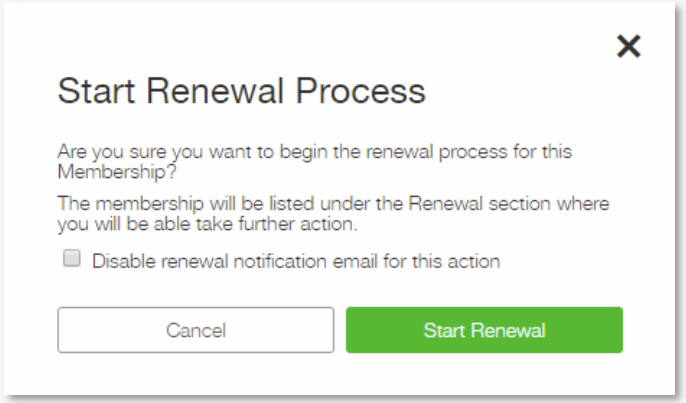
Membership Profile

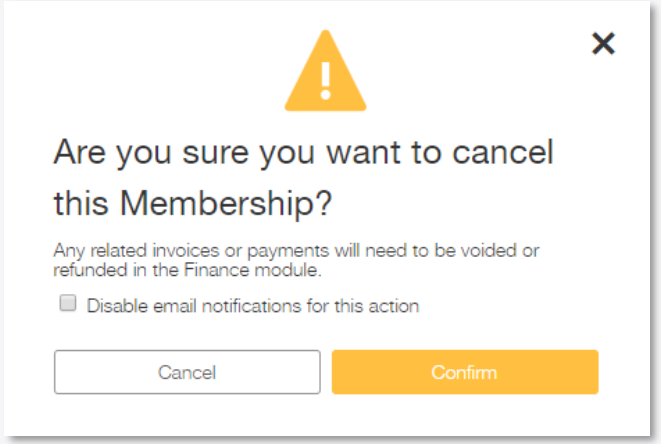
EventBank

Corporate Membership Profile

Forcing the Renewal – even the member is not yet in Renewal Process, but can start the renewal process.







Membership Profile

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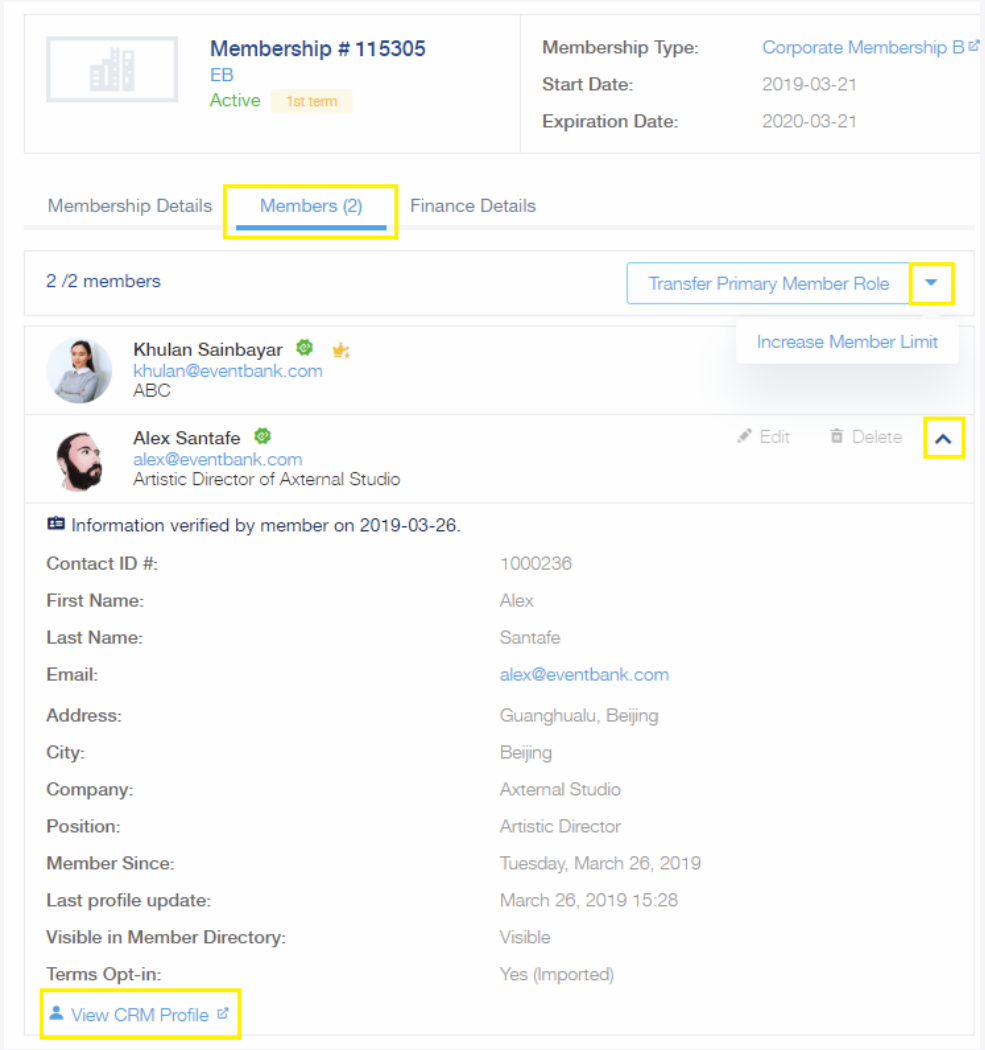
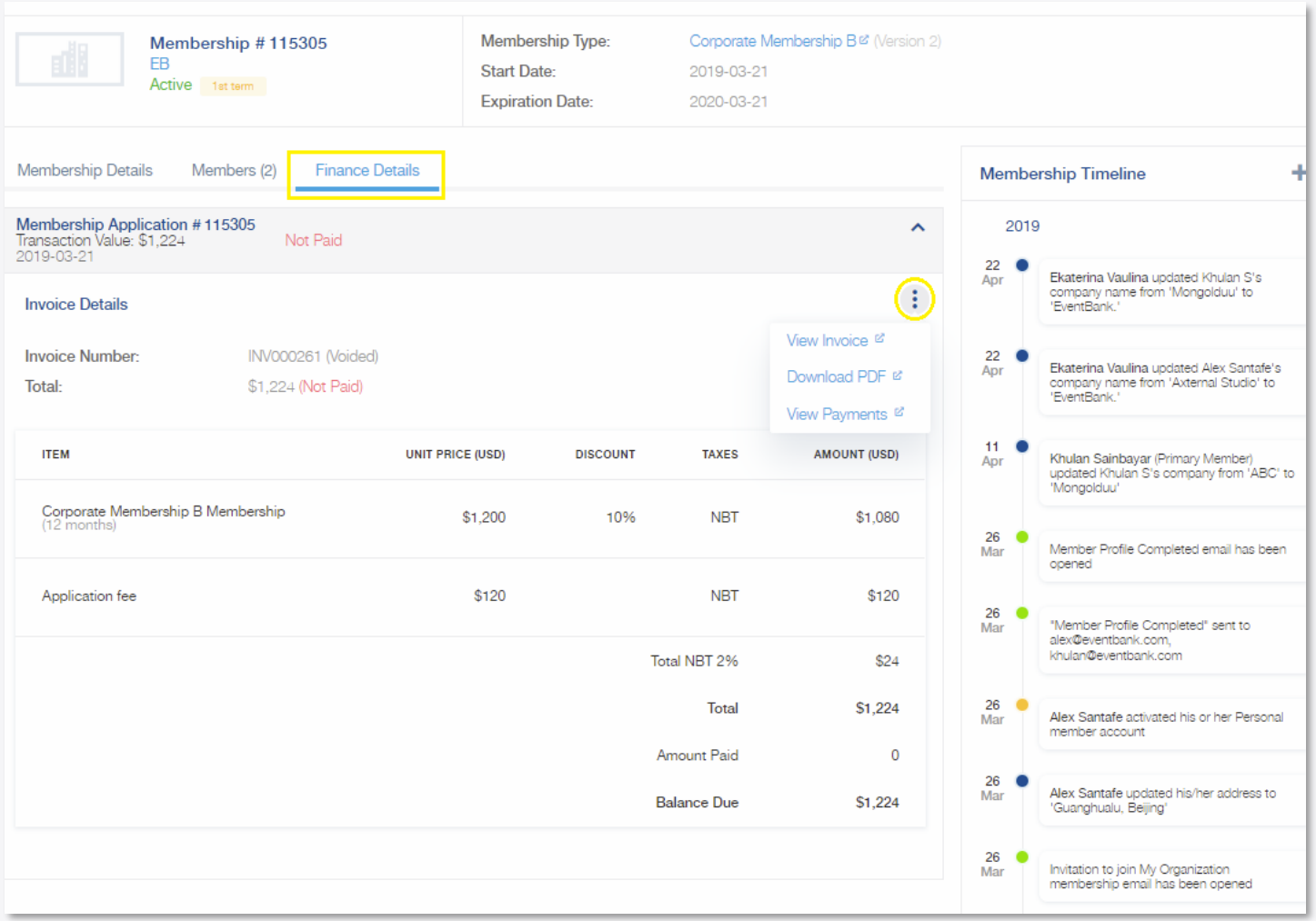
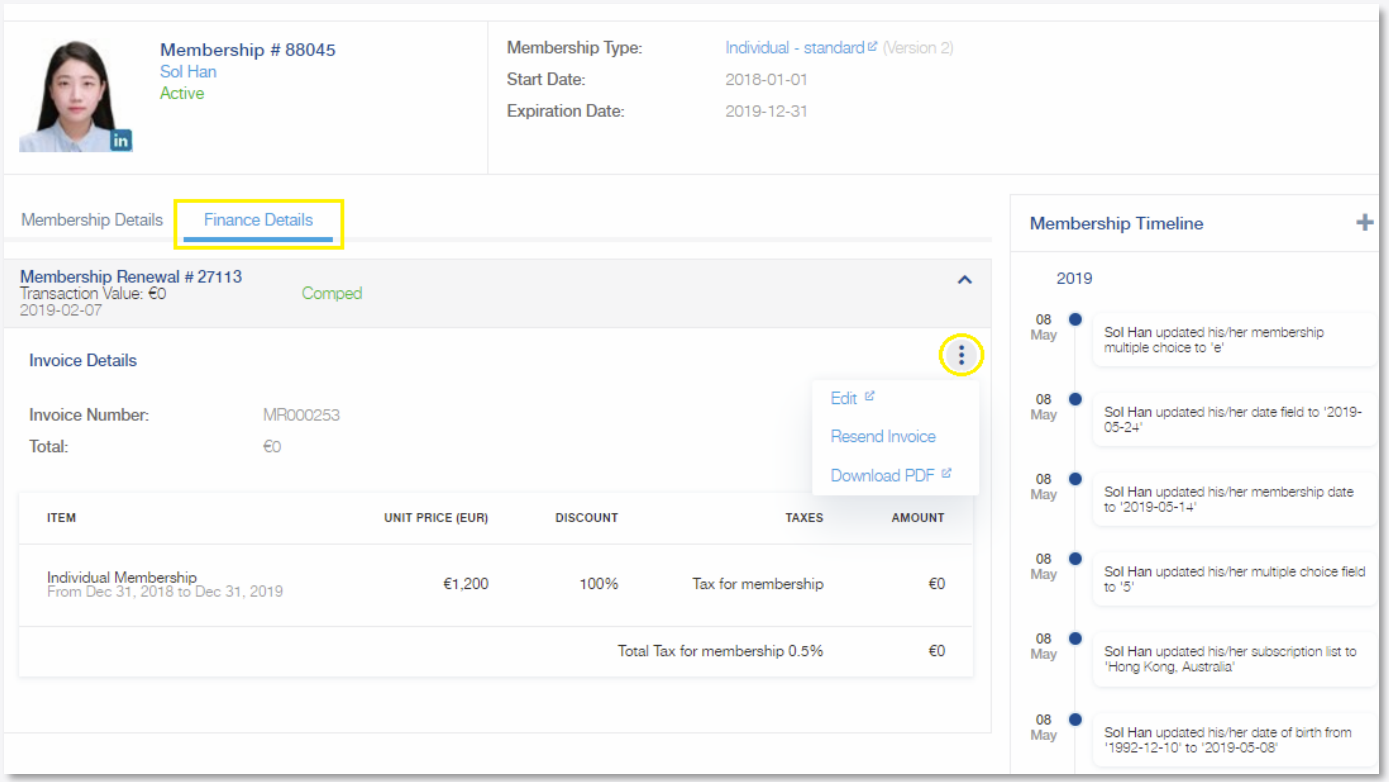
Corporate Membership's Members and Finance Details.

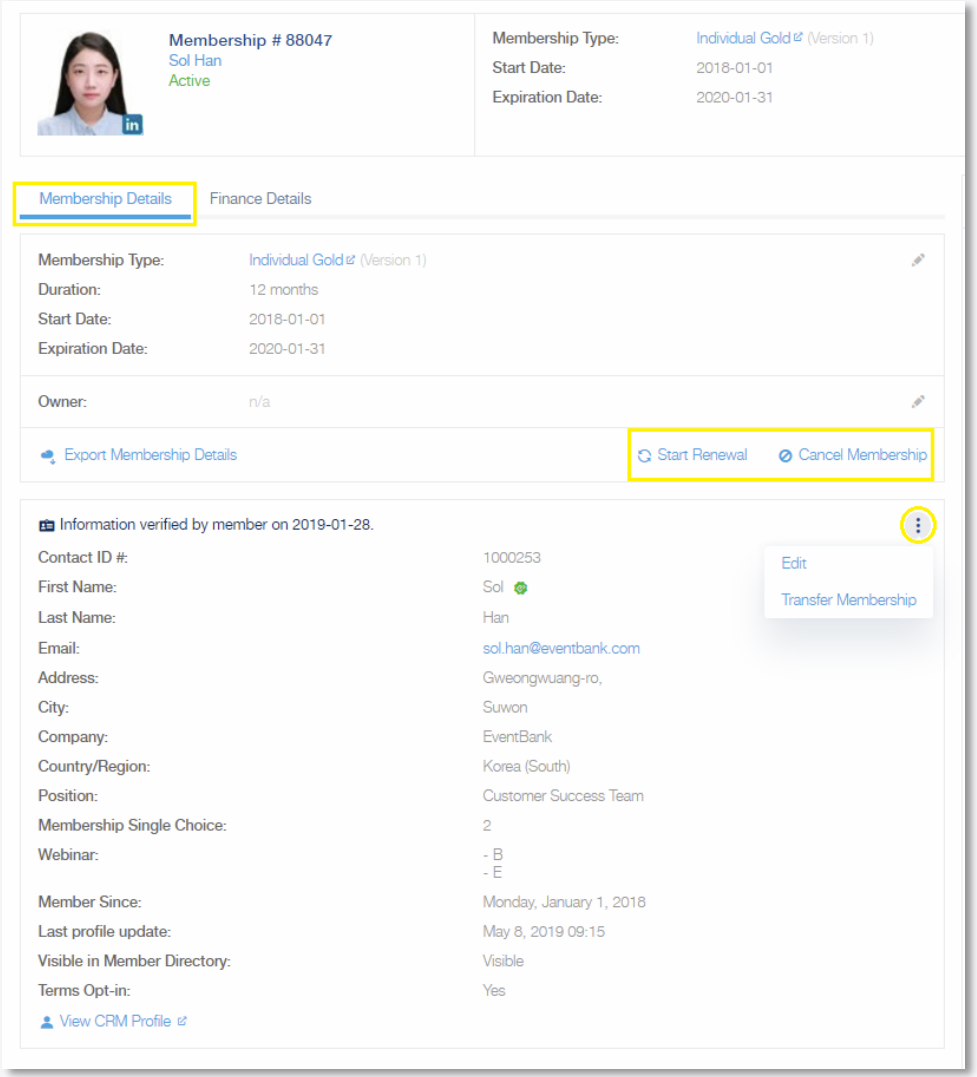




Membership Profile

Individual Membership Profile: Start Renewal, Cancel Membership, Edit Member's information, and Transferring the Membership to other person is available.





Membership Experience

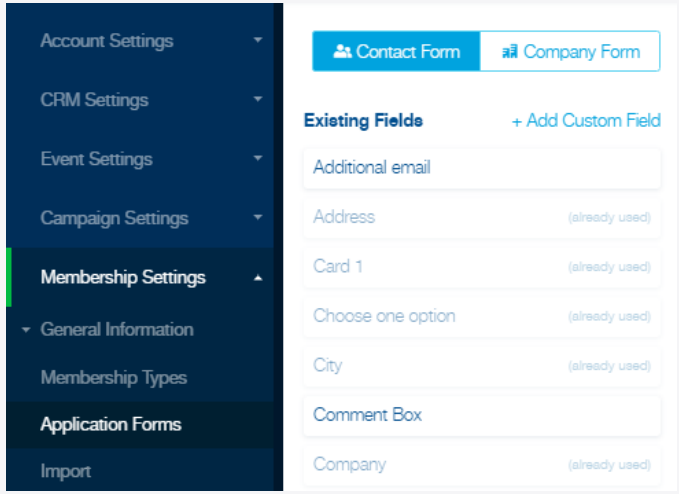
EventBank

Corporate Application:

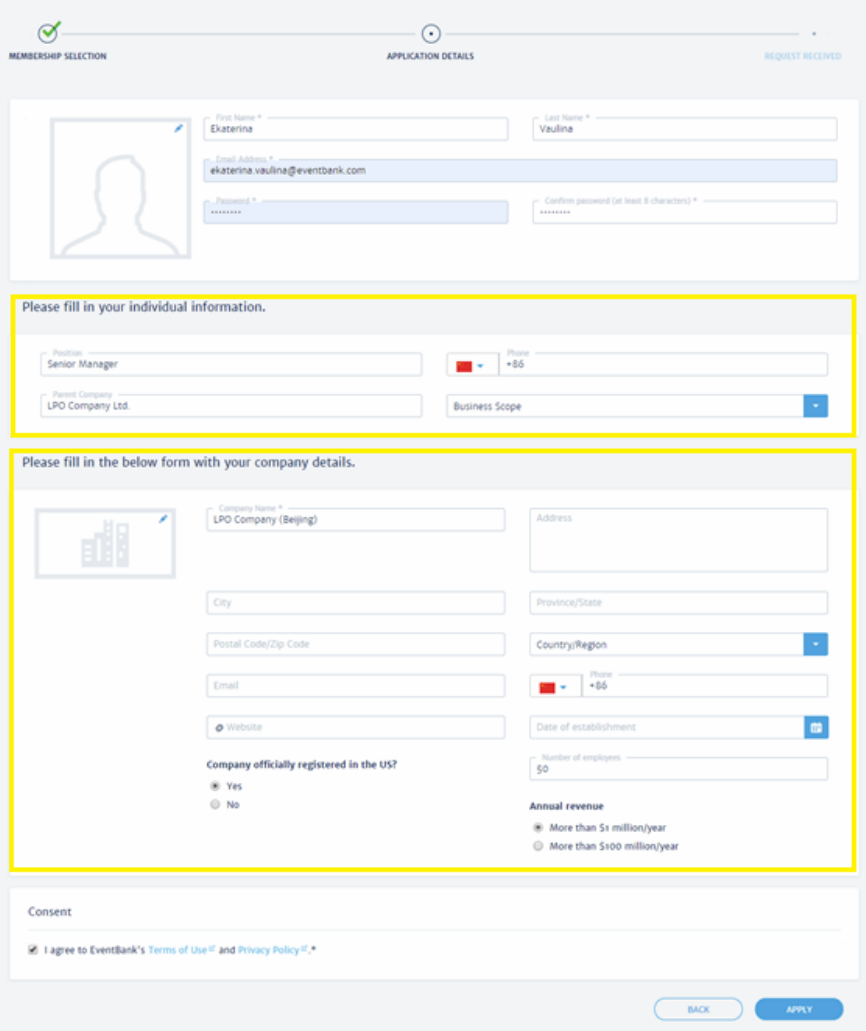
- Contact Form + Company Form

Individual Application:

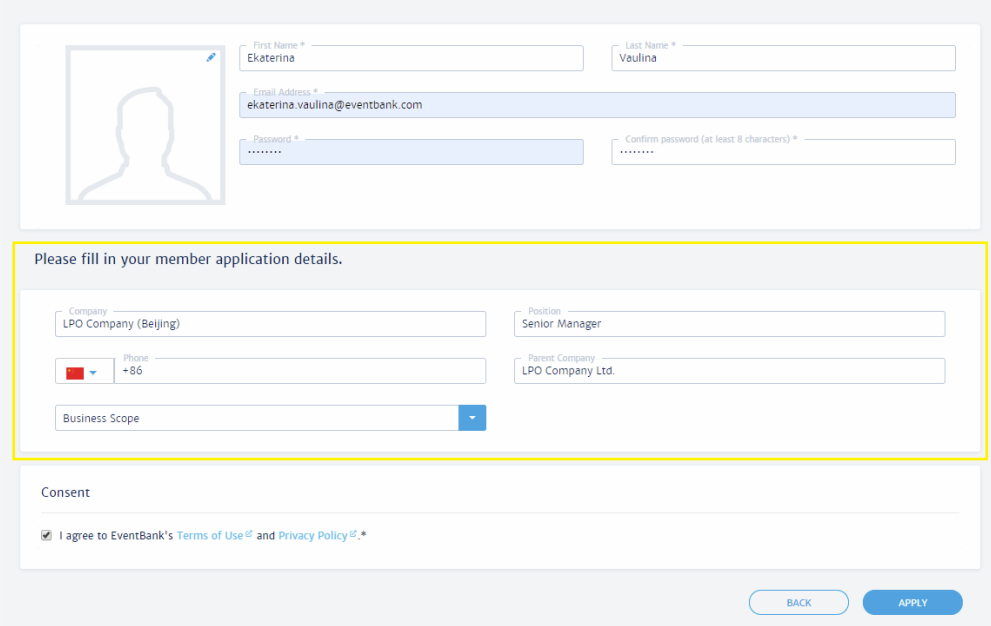
- Only Contact Form



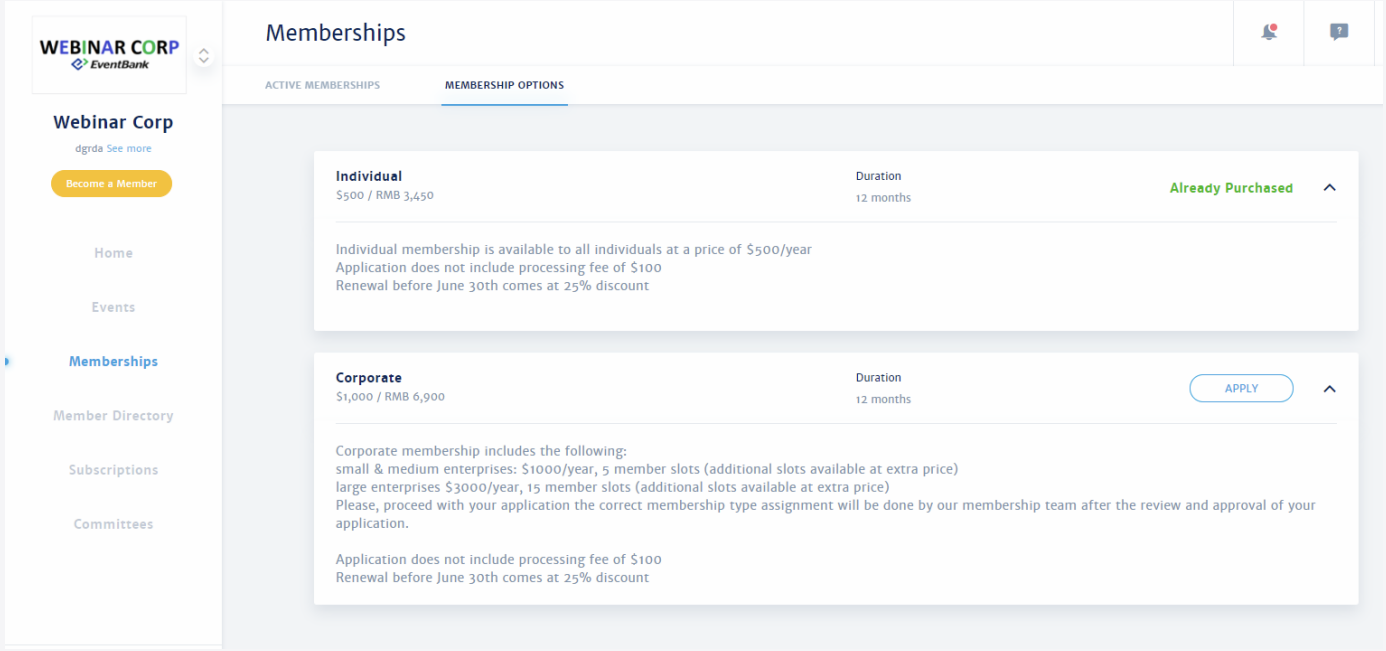
Corporate Membership Application Form

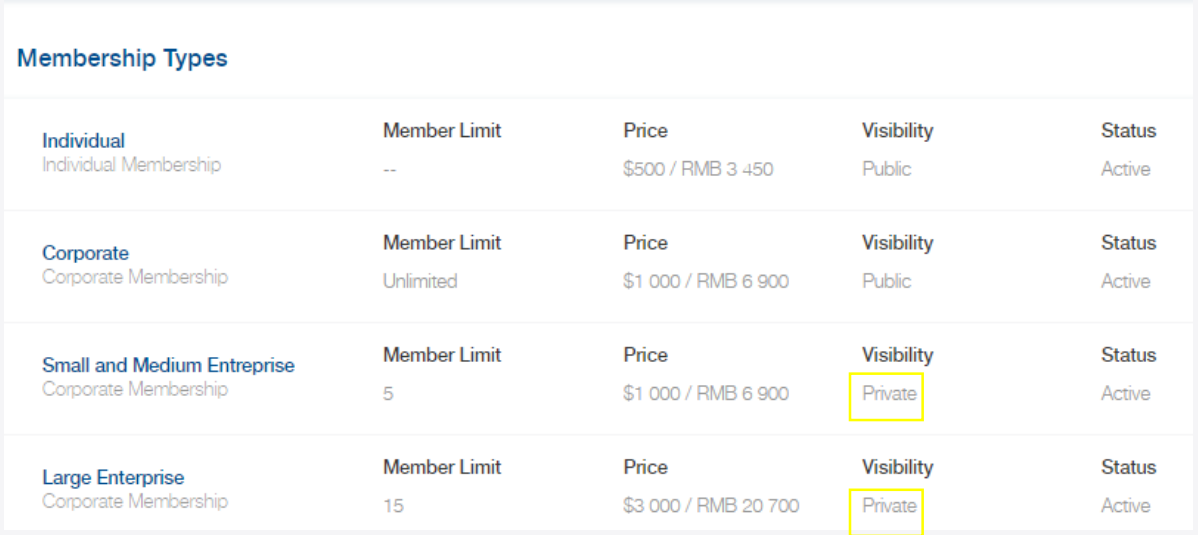


Individual Membership Application Form



Membership Experience - What Member see?



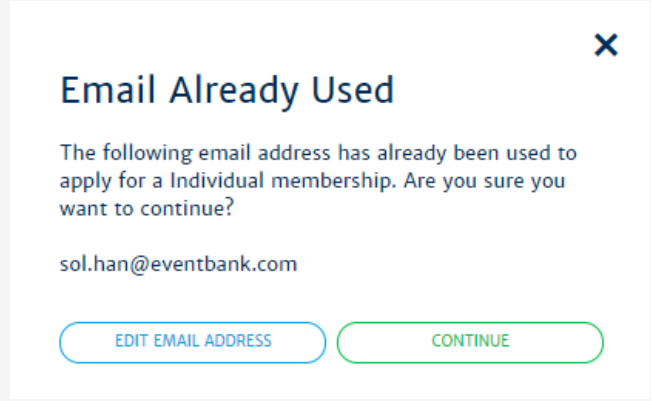


Private Membership Type:

- In MyEventBank page, Members will not be able to find the membership type which is created as “Private

Already Purchased Membership:

- When member already has that specific membership, they will not be able to apply via MyEventBank page.
- Even they apply for the same membership type from the website or links, the members will have the notification.



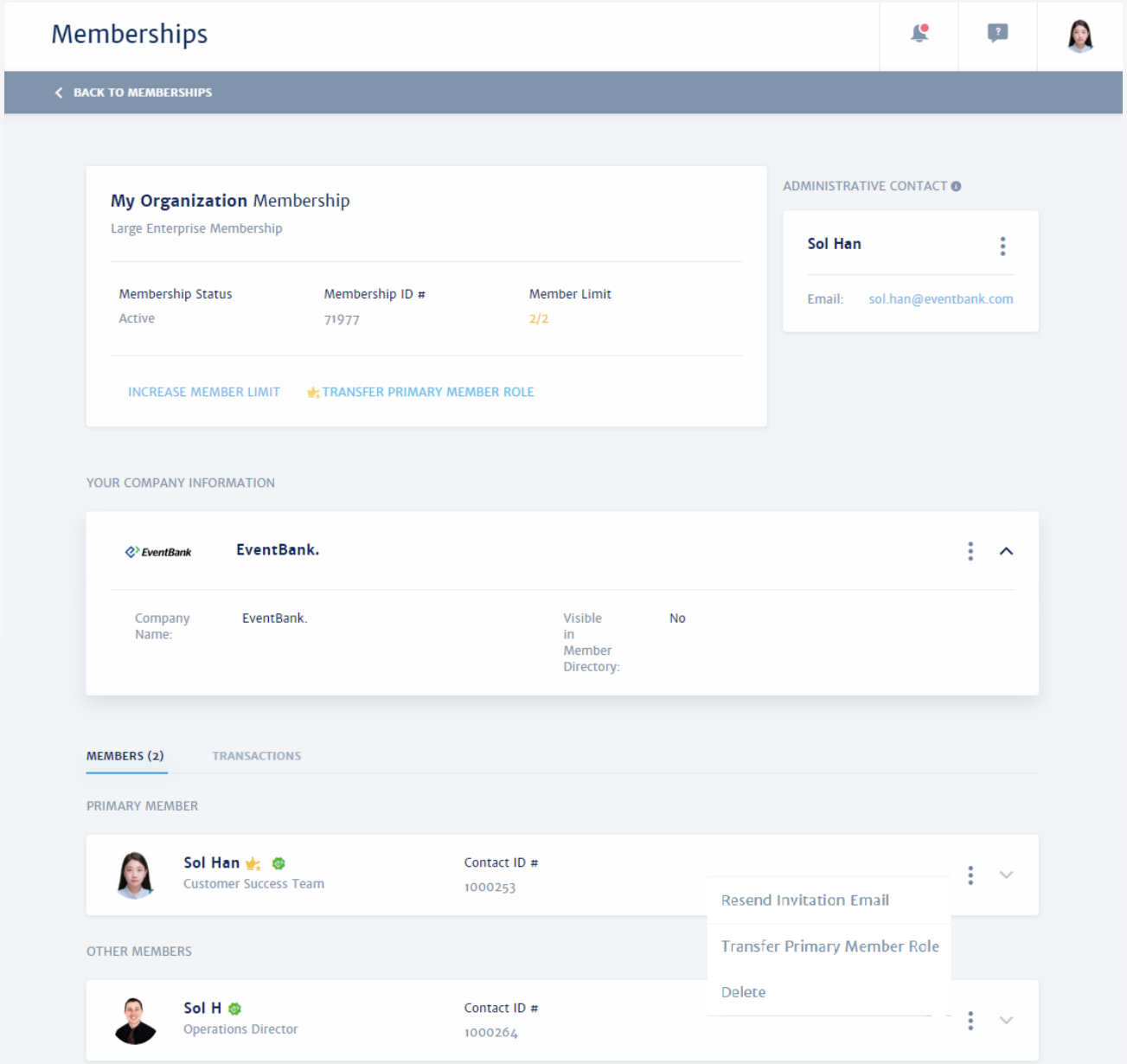
Membership Experience – Admin vs Primary Member

Primary Member can do:

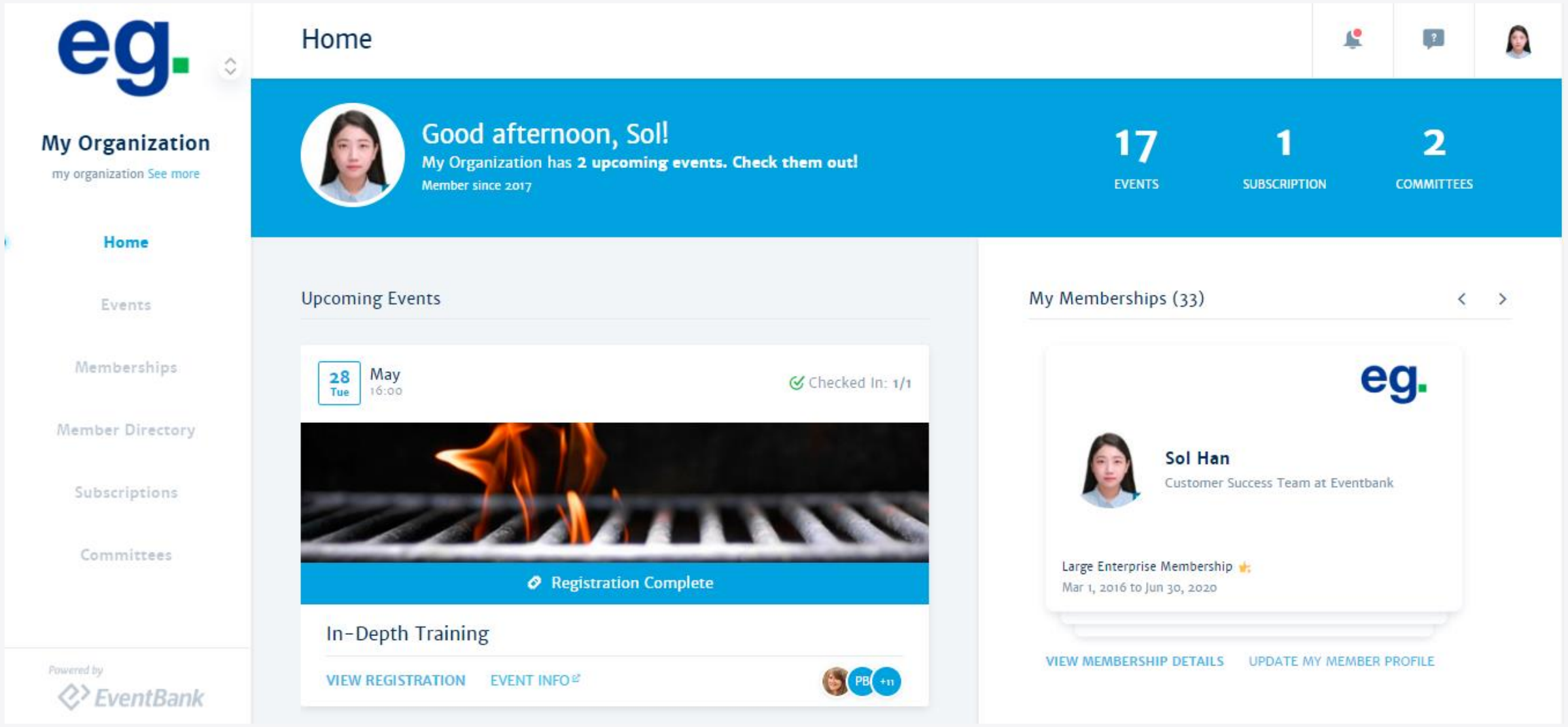
1. Add New Member
2. Remove a Member
3. Transfer the Primary Member Role
4. Edit Company Information
5. Edit him/herself profile
6. Edit Admin Contact

Admin Contacts can do:

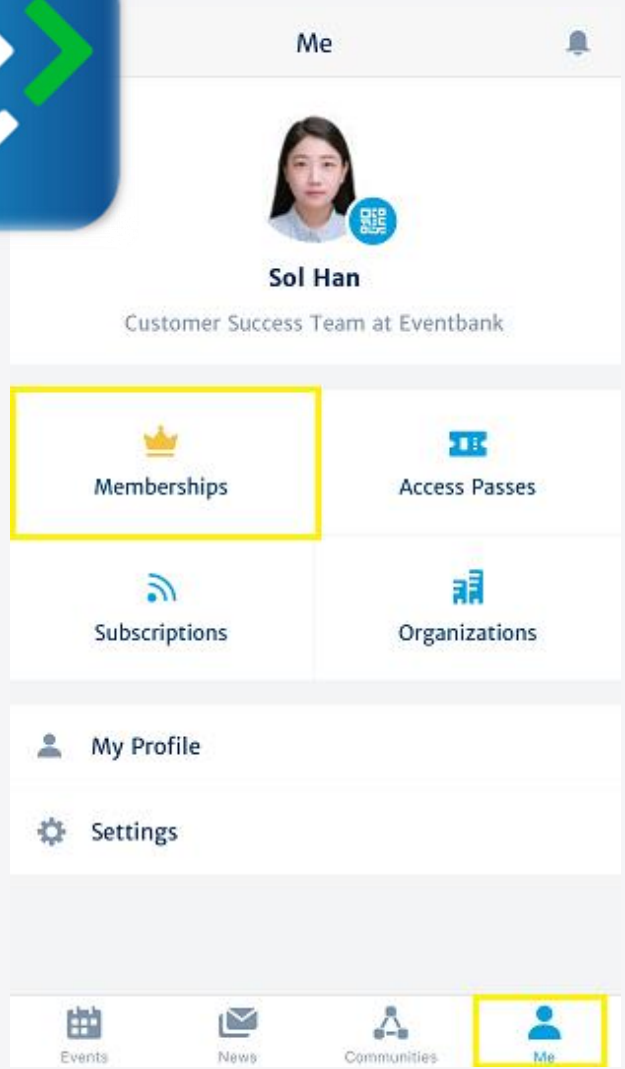
1. Receive Membership Notification
2. Pay for the Renewals

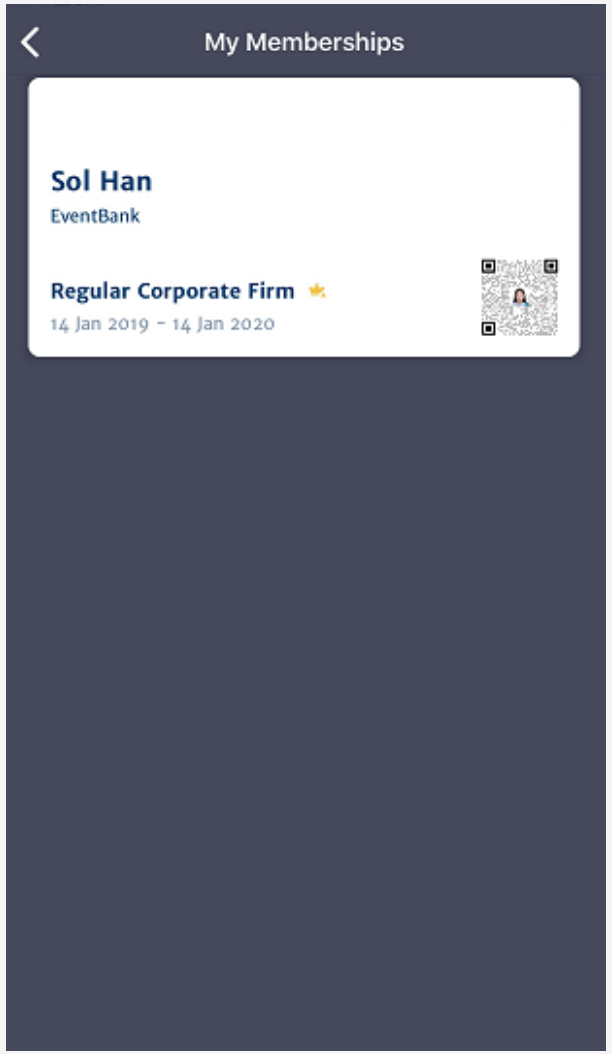


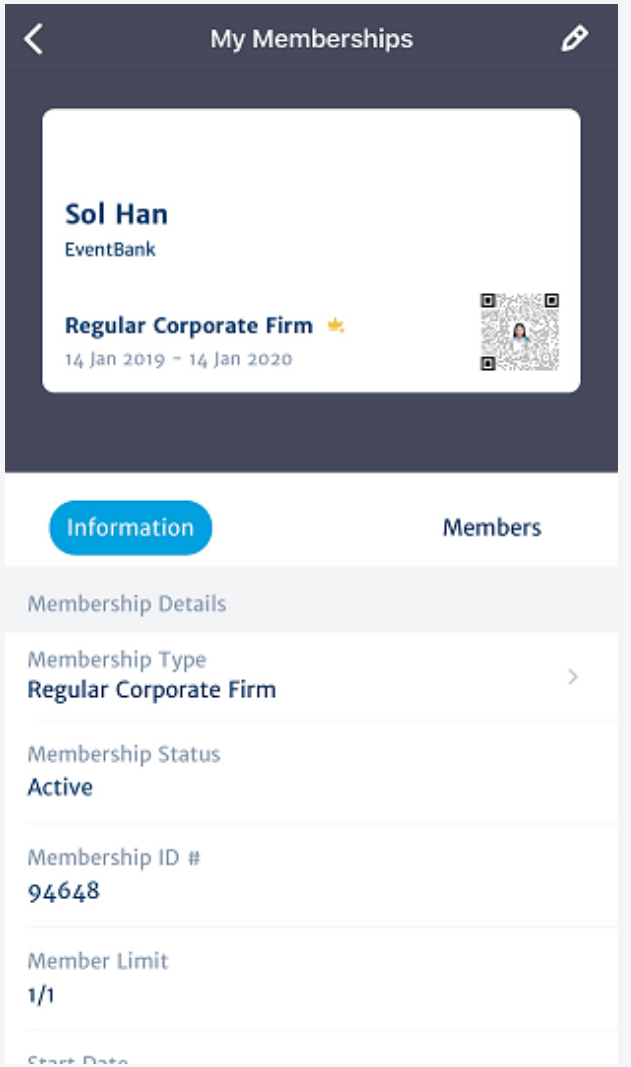
Membership Experience – My EventBank



Membership Experience – EventBank Mobile App







Thank You