

Membership Workflow

Efficiently Manage Your Membership Applications and Renewals



Membership Workflow

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 Settings

Organization Settings

Account Settings	CRM Settings	Event Settings	Campaign Settings	Membership Settings	Other Settings
Profile	CRM Forms	Blueprints	Templates	General Information	Finance Settings
Team Members	Opportunity Types	Templates	Sender Settings	Membership Types	Field Settings
Roles & Permissions	Import History	Venues		Application Forms	Widgets
Consent Preferences		Tags		Import	Export History

Currency Options

Chinese RMB

Add another currency

Membership Prices

Price in Chinese RMB *

Additional members price in Chinese RMB *

Additional members price outside Application/Renewal in Chinese RMB

Activate prorated pricing

Require payment for next term

If upcoming fixed date is within *

30 days

Exclude required payment for time between start date and upcoming fixed date

Extra Fee

Add an extra fee

Tax Settings

Select a tax

Discount

Add a discount

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 membership price

General VAT Fapiao

Special VAT Fapiao

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

Fapiao Delivery Methods *

Send by mail

Pickup at My Organization's office

Prorated Pricing Configuration

Determine when you want to begin prorated pricing, how often you want the pricing to change, and how you want the pricing calculated.

Prorating Begins In *

January

Pricing Interval *

Every month

Pricing Calculation *

Include current interval

Membership Notification Settings

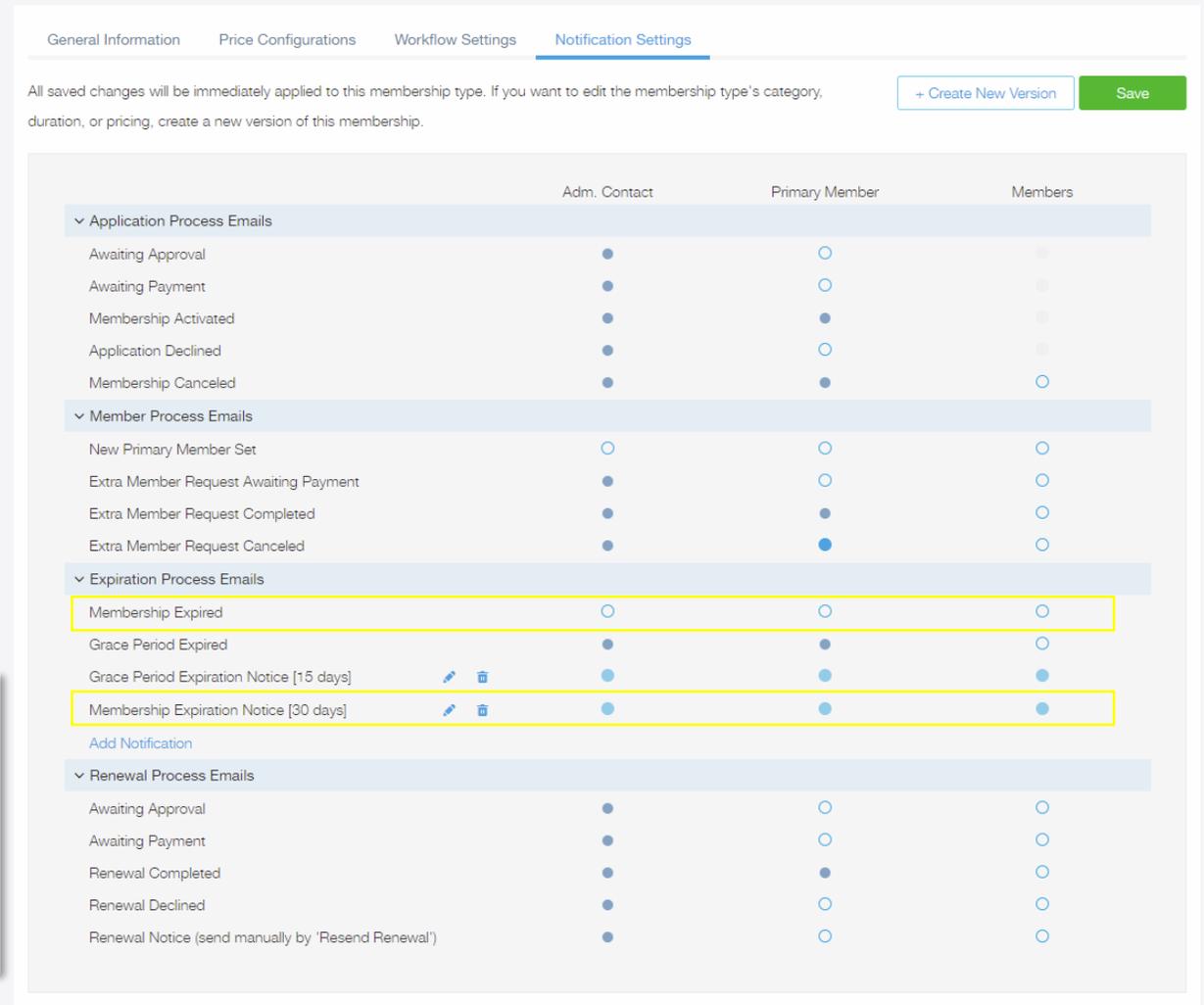
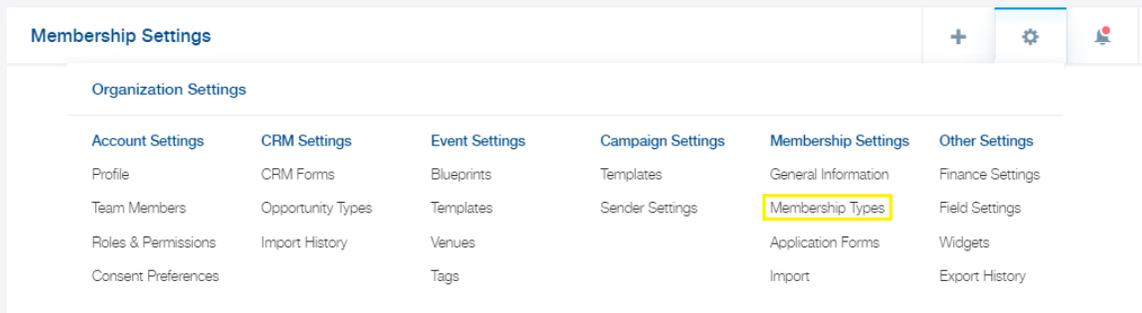


To manage the notifications for the membership workflow, click the gear icon and select “Membership Types” in the Organization Settings

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

Expiraton Process Emails

Membership Expired		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grace Period Expired		<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Grace Period Expiration Notice [15 days]	 	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Membership Expiration Notice [30 days]	 	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

[Add Notification](#)



Membership Expiring Soon

Your Small Companies - (\$6 million gross revenue per year or less) membership is due to expire on **Apr 4, 2019**. Renew your membership for **\$5,000**.

Get your invoice after you validate your information.

Click below to begin the renewal process.

Renewal Details

Renewal ID 27613

Item	Payment Status	Amount (USD)
Small Companies - (\$6 million gross revenue per year or less) Membership From Apr 4, 2018 to Apr 4, 2020	NOT PAID	\$5,000
Total		\$5,000

Refund Policy: No refunds allowed.

Please note all the payment must be made in local currency with the exchange rate on the day of the payment.

[Renew Now](#)

If you have any questions, please contact memberships@myorganization.com



Membership Notification Settings

Grace Period Expiration Notice

Expiry Process Emails

Membership Expired		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grace Period Expired		<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Grace Period Expiration Notice [15 days]	 	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Membership Expiration Notice [30 days]	 	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

[Add Notification](#)



Membership Renewal Notice

Your KR Test membership is currently in the renewal grace period and will expire in 15 days. Click below to begin the renewal process.

If you have already paid for your renewal, please ignore this message.

Renewal Details

Renewal ID 29908

Item	Payment Status	Amount (USD)
KR Test Membership From Mar 19, 2019 to Mar 19, 2020	NOT PAID	\$2,500
Total		\$2,500

Refund Policy: No refunds allowed.

Please note all the payment must be made in local currency with the exchange rate on the day of the payment.

[Renew Now](#)

If you have any questions, please contact memberships@myorganization.com

Membership Notification Settings

Membership Expired w. Grace Period.

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

▼ Expiration Process Emails			
Membership Expired		<input type="radio"/>	<input type="radio"/>
Grace Period Expired		<input checked="" type="radio"/>	<input type="radio"/>
Grace Period Expiration Notice [15 days]	 	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Membership Expiration Notice [30 days]	 	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Add Notification			



Your grace period begins today.

Your Corporate Membership B membership is expiring today, however we are providing you with a grace period of 50 days. Click below to begin the renewal process.

If you have already paid for your renewal, please ignore this message.

Renewal Details		Renewal ID 22853
Item	Payment Status	Amount (USD)
Corporate Membership B Membership From Dec 31, 2018 to Dec 31, 2019	NOT PAID	\$1,200
Total		\$1,200

Refund Policy: No refunds allowed.

Please note all the payment must be made in local currency with excrate on the day of the payment

[Renew Now](#)

If you have any questions, please contact memberships@myorganization.com

Membership Notification Settings

Grace Period Expired

Expiry Process Emails

Membership Expired		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grace Period Expired		<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Grace Period Expiration Notice [15 days]	 	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Membership Expiration Notice [30 days]	 	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

[Add Notification](#)



Your grace period is expiring today.

Your Individual membership is expiring today. Click below to begin the renewal process.

If you have already paid for your renewal, please ignore this message.

Renewal Details

Renewal ID 25113

Item	Payment Status	Amount (EUR)
Individual Membership From Dec 31, 2018 to Dec 31, 2019	NOT PAID	€1,200
Total Tax for membership 0.5%		€6
Total		€1,206

Refund Policy: No refunds allowed.

Please note all the payment must be made in local currency with the exchange rate on the day of the payment.

[Renew Now](#)

If you have any questions, please contact memberships@myorganization.com



Membership Notification Settings

Membership Expired w/o Grace Period

▼ Expiration Process Emails

Membership Expired

Membership Expiration Notice [30 days]

[Add Notification](#)



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@myorganization.com

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

Approve Application

Are you sure you want to approve this application?

Membership Type LE

Total Member Slots 2 (includes 0 additional slots)

Disable email notifications for this action

Cancel Approve

Applications							+	Add Application
Awaiting Approval (6)		Awaiting Payment (30)		Awaiting Activation (10)		Declined		
All Membership Types		Any Owner		From Date	To Date			
APPLICATION ID #	COMPANY NAME	MEMBER NAME	MEMBERSHIP TYPE	PRICE	APPLICATION DATE	OWNER	ACTIONS	
141474	EventBank	Sol Han	LE	\$138	Today at 14:20	--	Approve Decline	
109455	Mongolduu	Khulan Sainbayar	Individual - standard	€1,725	2019-03-06 11:39	Khulan Sainbayar	Approve View Application Details	
105618	EventBank.	Bem Liu	Individual - standard	€1,725	2019-01-31 23:14	Bem Liu	Approve Edit Membership Change Owner	

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.

Applications

Awaiting Approval (4) | **Awaiting Payment (32)** | Awaiting Activation (11) | Declined

All Membership Types ▾ Any Owner ▾

From Date [calendar icon] To Date [calendar icon]

APPLICATION ID #	COMPANY NAME	MEMBER NAME	MEMBERSHIP TYPE	PRICE	APPLICATION DA	ACTIONS
140589	kkk	Ekaterina Vaulina	LCM	\$10,000	2019-05-28 19:	Add Payment [3 dots icon]
119282	AmCham Some Country	Ekaterina Vaulina	LE	\$151.80	2019-05-03 14:	View Application Details
117156	EventBank.	Sol Han	LCM	\$10,000	2019-04-08 16:	Edit Membership
115983	ABC	Khulan Sainbayar	Gold	\$2,000	2019-03-27 13:	Decline
115777	International Finance Institute	Sol Han	KR Test	\$2,084	2019-03-25 13:	Change Owner
						Resend Payment Notice
						Comp Application

Are you sure you want to comp this application?

ITEM	UNIT PRICE (USD)	TAXES	AMOUNT (USD)
Large Enterprise Membership Membership <small>Membership expires Jun 30, 2019</small>	\$120	VAT	\$120
		Total VAT 15%	\$18
		Total	\$138

A comped item ignores the original item price and is free of charge. The payment status will be changed to comped.

This action cannot be undone.

Disable email notifications for this action

[Cancel](#) [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.

Renewals						
Upcoming (46) Awaiting Approval (1) Awaiting Payment (16) Declined						
ID	MEMBERSHIP ID #	COMPANY NAME	MEMBER NAME	MEMBERSHIP TYPE	PRICE	ACTIONS
32704	80677 <small>1st term</small>	Apply again	Ekaterina Vaulina	LE	\$138	Confirm Refuse
32705	119283 <small>1st term</small>	AmCham Some Country	Ekaterina Vaulina	LE	\$138	Confirm View Membership Details
32654	80475 <small>1st term</small>	ds	Sol Han	Gold Corporate - standard	\$5,000	Confirm Edit Renewal
31737	120836	International Finance Institute	Sol Han	Individual Gold	€1,000	Confirm Refuse Change Owner
31712	119450	Test for AmCham Sri Lanka	AmCham Sri Lanka	so_test	€1	Confirm Refuse

General Information Price Configurations **Workflow Settings** Notification Settings

All saved changes will be immediately applied to this membership type. If you want to edit the membership type's category, duration, or pricing, create a new version of this membership.

Application Workflow

Choose how many steps are required for the membership application process. [View current application timeline](#)

- Require approval for all applications
- Require approval for all applications after payment

Expiration Workflow

Configure duration parameters for the renewal workflow and grace period. [View expiration timeline](#)

of days before a membership expires to begin renewal workflow *

- Enable grace period
- Grace period duration (in days) *

Renewal Workflow

Determine if the renewal requires approval. [View current renewal timeline](#)

- Require approval for all renewals

Member Application Workflow

- Require approval for all members added by a primary member

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.

Renewals							🔍	📄	⚙️											
Upcoming (46)							Awaiting Approval (1)			Awaiting Payment (16)			Declined							
Any Membership Status ▾							All Membership Types ▾							Any Owner ▾						
From Date 📅							To Date 📅													
ID	MEMBERSHIP ID #	COMPANY NAME	MEMBER NAME	MEMBERSHIP TYPE	PRICE	ACTIONS														
32704	80677	1st term	Apply again	Ekaterina Vaulina	LE	\$138	Confirm	Refuse	⋮											
32705	119283	1st term	AmCham Some Country	Ekaterina Vaulina	LE	\$138	Confirm	Refuse	⋮											



Membership Expiring Soon

Your Small Companies - (\$6 million gross revenue per year or less) membership is due to expire on **Apr 4, 2019**. Renew your membership for **\$5,000**.

Get your invoice after you validate your information.

Click below to begin the renewal process.

Renewal Details		Renewal ID	27613
Item	Payment Status	Amount (USD)	
Small Companies - (\$6 million gross revenue per year or less) Membership From Apr 4, 2019 to Apr 4, 2020	NOT PAID	\$5,000	
Total		\$5,000	

Refund Policy: No refunds allowed.

Please note all the payment must be made in local currency with the exchange rate on the day of the payment.

Renew Now

If you have any questions, please contact memberships@myorganization.com



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.

ⓘ This membership is in renewal and is awaiting organizational approval. The membership will renew as a **Gold Corporate - standard** membership. [Edit Renewal](#) ✓ Approve ✗ Decline

 Membership # 60475 ds Active 1st term	Membership Type: Gold Corporate - standard (Version 1) Start Date: 2018-07-11 Expiration Date: 2019-07-14 (40 days remaining)
--	---

Membership Details | Members (1) | Finance Details

RENEWAL | CONFIRMATION | APPROVAL | PAYMENT | COMPLETE

Membership Type:	Gold Corporate - standard (Version 1)
Duration:	12 months
Start Date:	2018-07-11
Expiration Date:	2019-07-14
Base Member Limit:	10
Additional Purchased:	1

Membership Timeline

2019

- 03 Jun: Membership Renewal Status - Awaiting Approval email has been opened
- 03 Jun: "Membership Renewal Status - Awaiting Approval" sent to sol.han@eventbank.com
- 03 Jun: Sol Han (Primary Member) confirmed renewal
- 08 Jun: ...

Edit Membership Renewal

Membership Type *

End Date *

Additional Members *

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.

ⓘ This membership is in renewal and is awaiting confirmation by the primary member. The membership will renew as a LE membership. [Edit Renewal](#)

 **Membership # 80677**
[Apply again](#)
 Active 1st term

Membership Type: [LE](#) (Version 1)
 Start Date: 2019-01-16
 Expiration Date: 2019-06-30 (23 days remaining)

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

Membership Renewal # 32704
 Transaction Value: \$338 Not Paid
 2019-05-31

Invoice Details

Total: \$338 (Not Paid) [EDIT](#)

ITEM	UNIT PRICE (USD)	TAXES	AMOUNT (USD)
------	------------------	-------	--------------

Items

ITEM	UNIT PRICE (USD)	TAXES	AMOUNT (USD)	ACTIONS
Large Enterprise Membership Membership From Jun 30, 2019 to Jun 30, 2020	\$120	VAT	\$120	Edit
Other	\$200		\$200	
		Total VAT 15%	\$18	
		Total	\$338	
		Amount Paid	0	
		Balance Due	\$338	

[+ Add Item](#)

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.

Renewals 🔍 ⬇️ ⚙️

Upcoming (44) Awaiting Approval (2) **Awaiting Payment (17)** Declined

All Membership Types ▾ Any Owner ▾ From Date 📅 To Date 📅

ID	MEMBERSHIP ID #	COMPANY NAME	MEMBER NAME	MEMBERSHIP TYPE	PRICE	EXPIRATION DATE	ACTIONS
31737	120836	International Finance Institute	Sol Han	Individual Gold	€1,000	2018-12-31	Add Payment ⋮
29607	114750	EventBank	Ekaterina Vaulina	Individual - standard	€1,725	2019-03-19	View Membership Details
29539	80651	Company Number Two	Ekaterina Vaulina	Corporate Membership B	\$1,326	2020-02-02	Edit Renewal
29385	57288 1st term	EventBank	Ekaterina Vaulina	Individual - standard	€1,825	2019-05-14	Decline
29183	109552	ABC	Ekaterina Vaulina	Corporate Membership B	\$1,326	2019-03-31	Change Owner
25113	88047 1st term	International Finance Institute	Sol Han	Individual - standard	€1,725	2018-12-31	Resend Payment Notice
							Comp Renewal
							Add Payment ⋮

⚠️ ✕

Are you sure you want to comp this renewal?

ITEM	AMOUNT (EUR)
Individual Gold Membership From Dec 31, 2018 to Dec 31, 2019	€1,000
Total	€1,000

A comped item ignores the original item price and is free of charge. The payment status will be changed to comped.

This action cannot be undone.

Disable email notifications for this action

[Cancel](#) [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 Types					+ Add Membership Type	
Membership Type	Member Limit	Price	Visibility	Status	Membership Details	
Corporate Membership B Corporate Membership	2	\$1,200	Public	Active	Corporate Membership B Corporate Membership	
Individual - standard Individual Membership	--	€1,500	Public	Active	Edit Edit Draft Version Access Application Form Import Memberships	
Gold Corporate - standard Corporate Membership	Unlimited	\$5,000	Private	Active	21 Memberships 12 Applications 23 Renewals	
Individual Membership	Member Limit	Price	Visibility	Status		

General Information | Price Configurations | Workflow Settings | Notification Settings

All saved changes will be immediately applied to this membership type. If you want to edit the membership type's category, duration, or pricing, create a new version of this membership. [+ Create New Version](#)

Name

Membership Type Name * Internal Membership Type Name

Category

Individual Corporate

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.

01 New Version Information 02 New Version Pricing 03 Activation Rules 04 Review & Schedule

Corporate Membership B - Version 3 (Draft Version) Save Save And Continue

Category

Member Limit

Allow additional member add-on purchases

Max Additional Members

Duration

Duration of Membership *

Membership ends on fixed date(s)

01 New Version Information 02 New Version Pricing 03 Activation Rules 04 Review & Schedule

Corporate Membership B - Version 3 (Draft Version) Save Save And Continue

Currency Options

US Dollar

Add another currency

Membership Prices

Price in US Dollar *

Additional members price in US Dollar *

Additional members price outside Application/Renewal in US Dollar *

Extra Fee

Add an extra fee

Discount

Add a discount

Tax Settings

Select a tax

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.

Activation Date

Immediately apply all settings

Activation Date *

Existing Records in Workflow Manager

Existing Applications *
Use new version settings immediately

Existing Renewals *
Use new version settings immediately

New Records Created Before Activation Date

New Applications *
Use new version settings immediately

Select an option for new applications *

Use new version settings immediately

Use new version settings on activation date

Select an option for existing renewals *

Use new version settings immediately

Use new version settings on activation date

Do not apply new version settings

Applications

Awaiting Approval (6) Awaiting Payment (30) Awaiting Activation (11)

All Membership Types Any Owner

APPLICATION ID #	COMPANY NAME	MEMBER NAME	MEMBERSHIP TYPE	PRICE	APPLICATION DATE	OWNER
141475	Focus Pocus	Ekaterina Vaulina	LCM	\$7,034	Yesterday at 14:34	--
109455	Mongolduu	Khulan Sainbayar	Individual - standard	€1,725	2019-03-06 11:39	Khulan Sainbayar

Renewals

Upcoming (43) Awaiting Approval (1) Awaiting Payment (18)

Any Membership Status All Membership Types Any Owner

ID	MEMBERSHIP ID #	COMPANY NAME	MEMBER NAME	MEMBERSHIP TYPE	PRICE
32704	80677 <small>1st term</small>	Apply again	Ekaterina Vaulina	LE	\$338
32705	1102R3 <small>1st term</small>	AmCham Some Country	Ekaterina Vaulina	LE	\$138

Membership Version Update



Membership Types									+ Add Membership Type
		Member Limit	Price	Visibility	Status	Version			
	LE Corporate Membership	2	\$120	Public	Active	Version 1			
	LCM Scheduled Corporate Membership	10	\$10,000	Public	Active	Version 2 (Version 3 is scheduled for 2019-06-21)			

Review Membership Type Version

Be sure to review the information below before scheduling a new version of this membership type.

	Membership Type (Version)	Corporate Membership B (Version 3)
	Activation Date	2019-06-06
	Existing Applications	Use new version settings on activation date
	Existing Renewals	Do not apply new version settings
	New Applications	Use new version settings on activation date
	New Renewals	Use new version settings immediately
	Application Discount	Removed
	Application Extra Fee	Removed
	Taxes	Removed

Membership Version Update



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

Activation Date

Immediately apply all settings

Activation Date *
2019-06-06

Existing Records in Workflow Manager

Existing Applications *
Use new version settings immediately

New Records Created Before Activation Date

New Applications *
Use new version settings on activation date

Existing Renewals *
Do not apply new version settings

New Renewals *
Use new version settings immediately



<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



Corporate Membership Profile

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

Membership # 115305
EB
Active 1st term

Membership Type: Corporate Membership B (Version 2)
Start Date: 2019-03-21
Expiration Date: 2020-03-21

Membership Details | Members (2) | Finance Details

Membership Type: Corporate Membership B (Version 2)
Duration: 12 months
Start Date: 2019-03-21
Expiration Date: 2020-03-21
Base Member Limit: 2

Owner: Khulan Sainbayar

[Export Membership Details](#) [Start Renewal](#) [Cancel Membership](#)

Admin Contact: Khulan S
khulan@eventbank.com

Company Name: EB
Visible in Member Directory: Visible
[View CRM Profile](#)

Start Renewal Process

Are you sure you want to begin the renewal process for this Membership?

The membership will be listed under the Renewal section where you will be able take further action.

Disable renewal notification email for this action

[Cancel](#) [Start Renewal](#)

Are you sure you want to cancel this Membership?

Any related invoices or payments will need to be voided or refunded in the Finance module.

Disable email notifications for this action

[Cancel](#) [Confirm](#)

Membership Profile



Corporate Membership's Members and Finance Details.

Membership # 115305
EB
Active 1st term

Membership Type: Corporate Membership B [↗](#)
Start Date: 2019-03-21
Expiration Date: 2020-03-21

Membership Details **Members (2)** Finance Details

2 / 2 members Transfer Primary Member Role [↕](#)

 **Khulan Sainbayar** [✎](#) [👑](#)
khulan@eventbank.com
ABC Increase Member Limit

 **Alex Santafe** [✎](#)
alex@eventbank.com
Artistic Director of Axternal Studio Edit Delete [↕](#)

Information verified by member on 2019-03-26.

Contact ID #: 1000236
First Name: Alex
Last Name: Santafe
Email: alex@eventbank.com
Address: Guanghualu, Beijing
City: Beijing
Company: Axternal Studio
Position: Artistic Director
Member Since: Tuesday, March 26, 2019
Last profile update: March 26, 2019 15:28
Visible in Member Directory: Visible
Terms Opt-in: Yes (Imported)

[View CRM Profile \[↗\]\(#\)](#)

Membership # 115305
EB
Active 1st term

Membership Type: Corporate Membership B [↗](#) (Version 2)
Start Date: 2019-03-21
Expiration Date: 2020-03-21

Membership Details Members (2) **Finance Details**

Membership Application # 115305
Transaction Value: \$1,224 Not Paid
2019-03-21

Invoice Details ⋮

Invoice Number: INV000261 (Voided)
Total: \$1,224 (Not Paid)

[View Invoice \[↗\]\(#\)](#)
[Download PDF \[↗\]\(#\)](#)
[View Payments \[↗\]\(#\)](#)

ITEM	UNIT PRICE (USD)	DISCOUNT	TAXES	AMOUNT (USD)
Corporate Membership B Membership (12 months)	\$1,200	10%	NBT	\$1,080
Application fee	\$120		NBT	\$120
			Total NBT 2%	\$24
			Total	\$1,224
			Amount Paid	0
			Balance Due	\$1,224

Membership Timeline [+](#)

2019

- 22 Apr Ekaterina Vaulina updated Khulan S's company name from 'Mongolduu' to 'EventBank.'
- 22 Apr Ekaterina Vaulina updated Alex Santafe's company name from 'Axternal Studio' to 'EventBank.'
- 11 Apr Khulan Sainbayar (Primary Member) updated Khulan S's company from 'ABC' to 'Mongolduu'
- 26 Mar Member Profile Completed email has been opened
- 26 Mar "Member Profile Completed" sent to alex@eventbank.com, khulan@eventbank.com
- 26 Mar Alex Santafe activated his or her Personal member account
- 26 Mar Alex Santafe updated his/her address to 'Guanghualu, Beijing'
- 26 Mar Invitation to join My Organization membership email has been opened

Membership Profile



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



Membership # 88045
Sol Han
Active

Membership Type: Individual - standard (Version 2)
Start Date: 2018-01-01
Expiration Date: 2019-12-31

Membership Details | **Finance Details**

Membership Renewal # 27113
Transaction Value: €0
2019-02-07 Comped

Invoice Details

Invoice Number: MR000253
Total: €0

ITEM	UNIT PRICE (EUR)	DISCOUNT	TAXES	AMOUNT
Individual Membership From Dec 31, 2018 to Dec 31, 2019	€1,200	100%	Tax for membership	€0
Total Tax for membership 0.5%				€0

[Edit](#)
[Resend Invoice](#)
[Download PDF](#)



Membership # 88047
Sol Han
Active

Membership Type: Individual Gold (Version 1)
Start Date: 2018-01-01
Expiration Date: 2020-01-31

Membership Details | Finance Details

Membership Type: Individual Gold (Version 1)
Duration: 12 months
Start Date: 2018-01-01
Expiration Date: 2020-01-31

Owner: n/a

[Export Membership Details](#) [Start Renewal](#) [Cancel Membership](#)

Information verified by member on 2019-01-28.

Contact ID #:	1000253	Edit
First Name:	Sol	Transfer Membership
Last Name:	Han	
Email:	sol.han@eventbank.com	
Address:	Gyeongwang-ro,	
City:	Suwon	
Company:	EventBank	
Country/Region:	Korea (South)	
Position:	Customer Success Team	
Membership Single Choice:	2	
Webinar:	- B - E	
Member Since:	Monday, January 1, 2018	
Last profile update:	May 8, 2019 09:15	
Visible in Member Directory:	Visible	
Terms Opt-in:	Yes	

[View CRM Profile](#)

Membership Experience



Corporate Application:

- Contact Form + Company Form

Individual Application:

- Only Contact Form

The image shows a dark blue sidebar menu with the following items: Account Settings, CRM Settings, Event Settings, Campaign Settings, Membership Settings (highlighted), General Information, Membership Types, Application Forms, and Import. To the right, a white panel titled 'Existing Fields' contains a list of fields: Additional email, Address (already used), Card 1 (already used), Choose one option (already used), City (already used), Comment Box, and Company (already used). At the top of this panel are buttons for 'Contact Form' and 'Company Form', and a '+ Add Custom Field' link.

Corporate Membership Application Form

The screenshot shows a multi-step application form. The first step is 'MEMBERSHIP SELECTION' with a progress indicator. The second step is 'APPLICATION DETAILS' with a 'REQUEST RECEIVED' status. The form includes a profile picture placeholder and input fields for First Name (Ekaterina), Last Name (Vaulina), Email Address (ekaterina.vaulina@eventbank.com), Password, and Confirm password. Below this is a section titled 'Please fill in your individual information.' with fields for Position (Senior Manager), Phone (+86), Parent Company (LPO Company Ltd.), and Business Scope. The next section is 'Please fill in the below form with your company details.' with fields for Company Name (LPO Company (Beijing)), Address, City, Province/State, Postal Code/Zip Code, Country/Region, Email, Website, Date of establishment, and Number of employees. It also includes radio buttons for 'Company officially registered in the US?' (Yes/No) and 'Annual revenue' (More than \$1 million/year, More than \$100 million/year). A 'Consent' section at the bottom has a checked checkbox for 'I agree to EventBank's Terms of Use and Privacy Policy'. 'BACK' and 'APPLY' buttons are at the bottom right.

Individual Membership Application Form

The screenshot shows an individual membership application form. It starts with a profile picture placeholder and input fields for First Name (Ekaterina), Last Name (Vaulina), Email Address (ekaterina.vaulina@eventbank.com), Password, and Confirm password. Below this is a section titled 'Please fill in your member application details.' with fields for Company (LPO Company (Beijing)), Position (Senior Manager), Phone (+86), Parent Company (LPO Company Ltd.), and Business Scope. A 'Consent' section at the bottom has a checked checkbox for 'I agree to EventBank's Terms of Use and Privacy Policy'. 'BACK' and 'APPLY' buttons are at the bottom right.

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 Types				
	Member Limit	Price	Visibility	Status
Individual Individual Membership	--	\$500 / RMB 3 450	Public	Active
Corporate Corporate Membership	Unlimited	\$1 000 / RMB 6 900	Public	Active
Small and Medium Enterprise Corporate Membership	5	\$1 000 / RMB 6 900	Private	Active
Large Enterprise Corporate Membership	15	\$3 000 / RMB 20 700	Private	Active

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

The screenshot displays the 'Memberships' management page. At the top, there's a navigation bar with a 'BACK TO MEMBERSHIPS' link. The main content area is divided into several sections:

- My Organization Membership:** Shows details for a 'Large Enterprise Membership'. A table lists 'Membership Status' as 'Active', 'Membership ID #' as '71977', and 'Member Limit' as '2/2'. Below the table are two action buttons: 'INCREASE MEMBER LIMIT' and 'TRANSFER PRIMARY MEMBER ROLE'.
- ADMINISTRATIVE CONTACT:** A card for 'Sol Han' with a three-dot menu and an email address 'sol.han@eventbank.com'.
- YOUR COMPANY INFORMATION:** A card for 'EventBank.' with a three-dot menu and an upward arrow. Below it, a table shows 'Company Name' as 'EventBank.', 'Visible in Member Directory' as 'No', and a three-dot menu.
- MEMBERS (2) / TRANSACTIONS:** A tabbed interface with 'MEMBERS (2)' selected.
- PRIMARY MEMBER:** A card for 'Sol Han' (Customer Success Team) with 'Contact ID #' 1000253 and a three-dot menu. A dropdown menu is open, showing options: 'Resend Invitation Email', 'Transfer Primary Member Role', and 'Delete'.
- OTHER MEMBERS:** A card for 'Sol H' (Operations Director) with 'Contact ID #' 1000264 and a three-dot menu.

Membership Experience – My EventBank





Home

My Organization
my organization See more

- Home
- Events
- Memberships
- Member Directory
- Subscriptions
- Committees

Powered by 

Home

Good afternoon, Sol!
My Organization has **2 upcoming events**. Check them out!
Member since 2017

17 EVENTS
1 SUBSCRIPTION
2 COMMITTEES

Upcoming Events

28 Tue May 16:00
Checked In: 1/1



Registration Complete

In-Depth Training

[VIEW REGISTRATION](#) [EVENT INFO](#)

My Memberships (33)

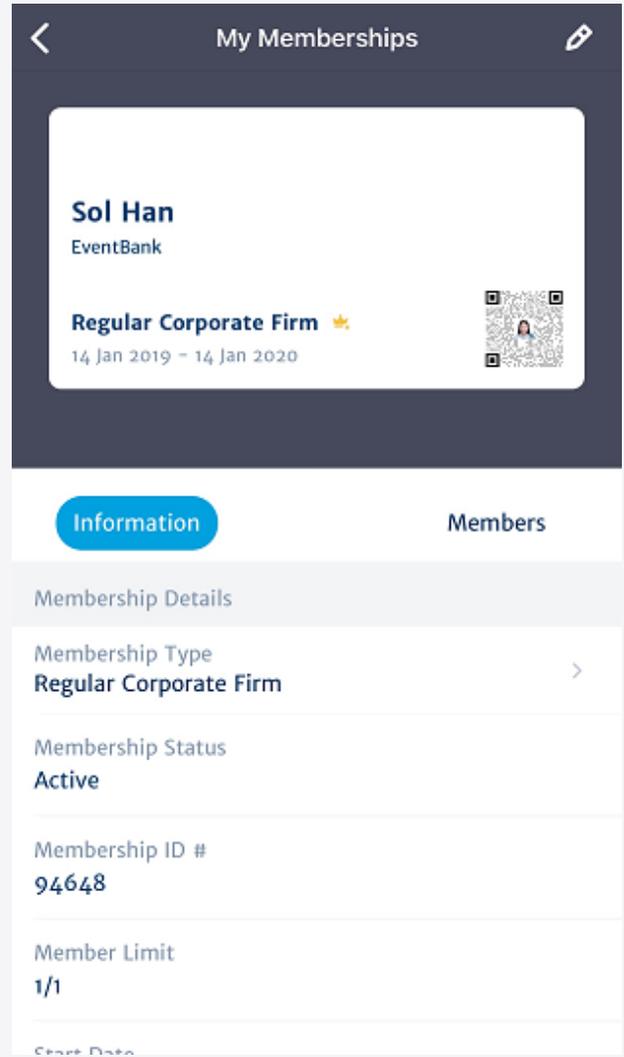
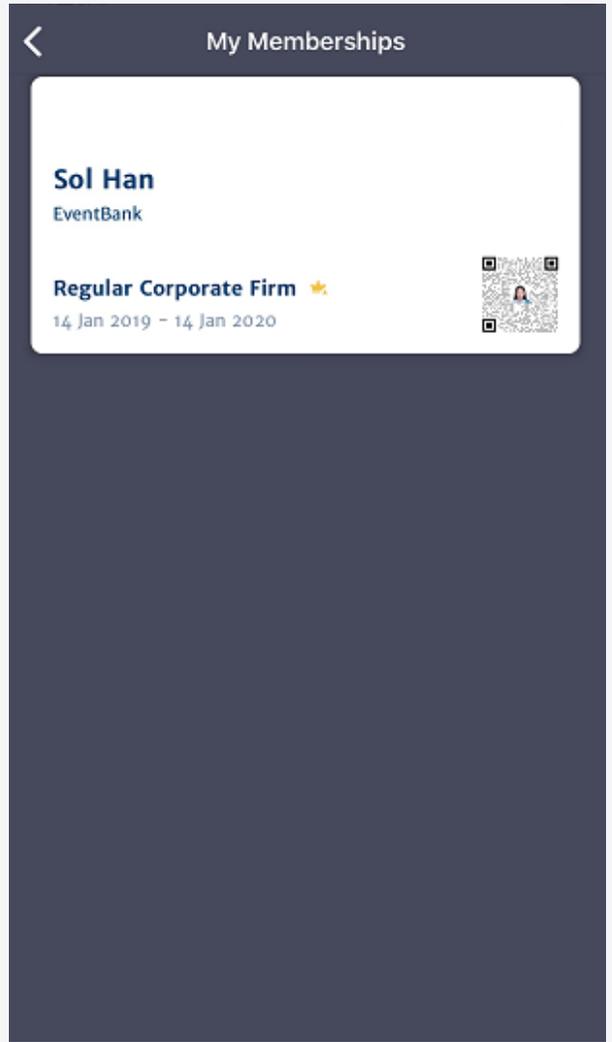
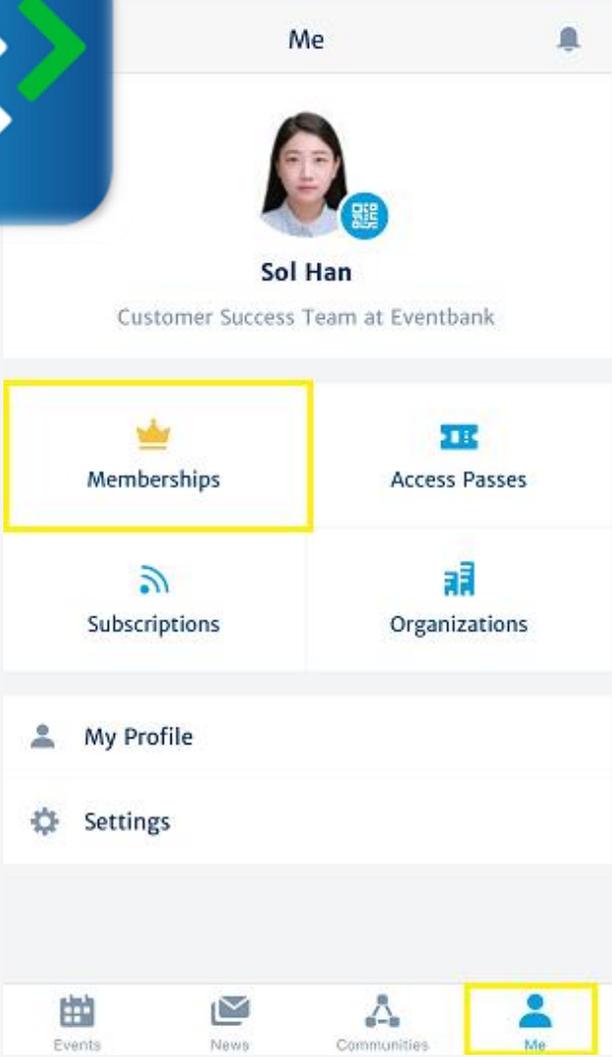


 **Sol Han**
Customer Success Team at Eventbank

Large Enterprise Membership 🌟
Mar 1, 2016 to Jun 30, 2020

[VIEW MEMBERSHIP DETAILS](#) [UPDATE MY MEMBER PROFILE](#)

Membership Experience – EventBank Mobile App



Thank You

