

CUSTOMER ADVISORY BOARD APPLICATION - PHASE-2

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Figma Prototype Link:


<https://www.figma.com/proto/kNcm5LKee0i0XCOPHkD0Cz/CAB?node-id=6-45&t=5Na5XnlFrPc4zOeP-1&scaling=min-zoom&content-scaling=fixed&page-id=0%3A1&starting-point-node-id=1%3A3>

Attendee Screens

Attendee Dashboard Overview:


Login & Navigation:

- Once you log in using your Attendee credentials, you are redirected to the Attendee Dashboard.
- This screen provides an overview of upcoming, ongoing, and completed events.


 Customer Advisory Board


Switch to Admin


Dashboard

 Attendee Jessica Gamboa

Attendee Dashboard

 Upcoming Events 04

 Ongoing Events 01

 Completed Events 12

Ongoing Event

Event Name: Encora CAB Summit March 2025 | Event Type: Virtual | Coordinator: Jessica Gamboa, Kirsten Torchalski | Date: March 18-19, 2025

View Event

My Events





Upcoming 4

Completed 12

Upcoming Event List

Search Event

Show 4 Events

Name	Type	Start Date	End Date	Coordinator/s	Reference Documents
CAB - vero eos et accusamus et iusto odio dignissimos Event 004	Live	03-10-2025	03-12-2025	Jessica Gamboa, John Smith	
CAB - Contrary to popular belief, Lorem Ipsum is simply text. It has piece of classical Event 003	Cancelled	04-21-2025	04-25-2025	John Anderson	
CAB - Lorem Ipsum is simply dummy text Event 001	Virtual	07-10-2025	07-12-2025	John Anderson	
CAB 09 - vero eos et accusamus et iusto odio dignissimos Event 022	Live	08-22-2025	08-25-2025	Jessica Gamboa	

Showing 4 of 4 Events

Page 1 of 1

Key Features & Actions:

- Attendees can view their event details, search for specific events, and access event-related documents.
- Clicking on an event name provides more information on event details page.
- The dashboard offers a clear summary of an attendee's event participation, making navigation efficient.
- Clicking on the reference document icon will open the following screen.

Reference Documents Screen

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Customer Advisory Board

Switch to Admin

Dashboard

Attendee Jessica Gamboa






Dashboard > Reference Documents

Reference Documents

Event Name: CAB - vero eos et accusamus et iusto odio dignissimos Event 004

Reference Document List (5)

Show 5 Rows

Name	Type
 Cab 01 - Instructions Guide for Event Lorem ipsum.pdf	.pdf
 Event CB 002 - Lorem ipsum dollar sit amet.mp4	.mp4
 Enc Sep 2025 - Contrary to popular belief, Lorem Ipsum.xlsx	.xlsx
 Default Enc Event Dec 2025 - Sed ut perspiciatis unde.mp3	.mp3
 New Enc CB Event Jan 2026.docx	.docx

Showing 5 out of 5 Records

Page 1 of 1

The screen is accessed by clicking on the **Reference Document** icon in the Attendee Dashboard.

This screen offers a centralized view of documents related to the event.

To navigate back to the attendee dashboard screen, users can use the breadcrumb trail located at the top (Attendee Dashboard > Reference Documents).









The Reference Document Grid consists of two columns:

Name: Displays the document Name. If we click on the Name, the document will open in a new browser tab.


Type: Indicates the file format (PDF, MP4, XLSX, MP3, DOCX) with identifiable icons.

Clicking on the View Event Button in the attendee Dashboard Screen then it will open the following screen.

Event Detail Screen

Hi Kevin, Welcome to the Encora Customer Advisory Board Summit 2024! Access your travel details and event information here.




Encora CAB Summit March 2025


March 19-21, 2025

19th Floor, Carlson 1100 Main St


CUSTOMER ADVISORY BOARD MEMBERS




Paul Miller
VP, Global Sales
APTIV




Kevin Riley
CEO and Chief of Engineering & Innovation
APTIV




Brian Kirkland
Chief Information Officer
eCHOICE




Andy Hallgren
VP, Global Sales
cloud




Mark Johnson
Director of Technology
community




Drew Newman
VP, Sales & BD
dell sources




Paul Stebel
President, Partners Network
GoDaddy




Brian Miller
Head of Sales, US
HISCOX




Todd Elomann
SVP of Engineering
Imagine Learning




Nico Fiebo
VP and SVP
KEYSIGHT




Matt Diamond
SVP
McAfee




Thomas Harris
Vice President, Sales/Marketing
Terminix and Security
PHILIPS




Juan Jose Hernandez
Vice President, International
Sales/Marketing
Scotiabank



Val Marchewsky
Head of Engineering
Liber Freight




Kumar Ramaswamy
CEO
Velocity Global




Brad Corman
SVP Software Engineering
VERTEX

Load More


ENCORA LEADERS




Jared Sage
SVP
Encora
ENCORA




Lyle Swanson
SVP and Chief Revenue Officer
ENCORA




Joshua Koster
SVP
Encora
ENCORA




Robert Kuchars
President of Sales, North & Central America
ENCORA




Roberta Venturoli
President, North America
ENCORA




Alison Lang
President, Europe and Asia Pacific
ENCORA



Henry de Oliveira
SVP, Europe, Middle East & Africa
ENCORA



Adrian Milescu
SVP, Latin America
ENCORA



Rodrigo Vargas
VP & LATAM Engineering
ENCORA

Load More

AGENDA

Mon, March 19, 2025 - Location: The Westin, Half Moon Bay

19th March, 2025, Tuesday - 8:00 PM - 8:30 PM (PT)

- 5:30 PM - 7:00 PM: Welcome Reception
- 7:00 PM - 8:30 PM: Dinner

19th March, 2025, Wednesday - 9:30 AM - 8:30 PM (PT)

- 7:30 AM - 8:00 AM: Breakfast
- 8:00 AM - 9:00 AM: Welcome & Introductions
- 9:00 AM - 9:30 AM: Overview of Encora E&S
- 9:30 AM - 10:30 AM: Building resilient and effective global digital engineering capabilities
- 10:30 AM - 11:00 AM: Break
- 11:00 AM - 12:00 PM: Scaling adoption of AI, Data, Cloud technologies, challenges & lessons
- 12:00 PM - 1:00 PM: Lunch
- 1:00 PM - 2:00 PM: Maximizing Engineering Value through Engineering Resource Performance
- 2:00 PM - 3:00 PM: Encora's service offerings and market strategy. Feedback from CAB members
- 3:00 PM - 3:30 PM: Wrap-up, Next Steps and Close

TRAVEL DETAILS - KEVIN RILEY

Flight

Encora Flight: FL 901 2024-06-17 16:00

Outbound Flight: FL 002 2024-06-18 16:00

Accommodation

Hotel Name: The Westin Carlson, Half Moon Bay

Reservation Number: 61188823

Check In: 2024-06-17

Check Out: 2024-06-18

Ground Transport Information

Arrival at Venue: 12:45:00 PM

Booking Number: 123456789

Drop Off Time: 2024-06-18 06:00

Vehicle Location: 1 St Clair Avenue, Millbrae, CA

Drop Off Location: The Westin Carlson, Half Moon Bay

Departing Event Venue

Booking Number: 123456789

Event Time: 2024-06-18 16:00



Arrival Location: The Westin Carlson, Half Moon Bay

Drop Off Location: SFO Airport Terminal, 1800 Old Bayshore Road, Burlingame, CA

VENUE



The Westin Carlson, Half Moon Bay

With stunning Pacific Ocean views, The Westin Carlson, Half Moon Bay, offers a luxurious experience just 20 miles from San Francisco International Airport. This purpose-built resort is renowned for its outstanding views, exceptional service and award-winning beaches.


View this page on Google Maps

CONTACT INFO





Organizing Committee: info@encora.com

Event Coordinators (2)



Jennifer Campbell
Senior Customer Experience
Program Manager
+1 415 479 0334



Kristen Tschudi
Senior Partnership Marketing
Manager
+1 408 901 3021

Have Questions? Share Them in Advance

Submit your questions in advance to ensure they're addressed during the meeting.

Share

This well-structured event details page ensures attendees have all necessary information in one place, making it easy to access schedules, travel plans, and key contacts.

The travel details section can only be edited by clicking the edit icon.

The Submit button allows users to share their input or questions directly.

When the edit icon in the Travel Details section is clicked, the screen will appear as shown below

Event Detail Page Editable Travel Details Screen

[illegible]

A welcome message greets the user, providing an overview of the event.

A featured event venue image is included for visual context.

Showcases key advisory board members with their profile pictures, names, titles, and associated organizations.

This page provides attendees with a detailed event overview. **If the logged-in user is an Attendee, they can only edit their own travel details, not those of other members.**

You can also navigate to the travel details section by clicking the flight icon in the showcases.

The structured layout ensures easy access to schedules, contact details, and venue information, enhancing the user experience.

Event Detail Page, logged-in user is both the attendee and the admin.

ENCORA

Customer Advisory Board

Home

Agenda

Travel Details

Venue & Contact

Hi Jessica, Welcome to the Encora Customer Advisory Board Summit 2025! Access your travel details and event information here.

Encora CAB Summit March 2025

March 18-19, 2025

The Ritz Carlton, Half Moon Bay

CUSTOMER ADVISORY BOARD MEMBERS

Paul Miller

CEO, APTIV

Kevin Rios

CEO and COO of Learning & Development

Brian Howard

Chief Information Officer

Amy Hulsagren

HR, COO and COO

Marcus Arnold

Chief Financial & Technology Officer

Brian Newman

CEO, CTO

Paul Brink

President, Partners Business Unit

Brian Habel

Head of Sales, US

Todd Sherman

VP of Engineering

Nadia Tachib

VP, Analytics

Matt Diamond

CEO

Thomas Parry

Chief Product Officer, Technology and Innovation

Juan Jose Hernandez

Chief Financial, International

Val Marchewsky

Head of Engineering

Kumar Ramaswathan

CEO

Paul Cameron

VP Software Engineering

ENCORA LEADERS

Arant Bito

CEO

Leif Wallace

VP & CTO

Joshua Kanner

CMO

Robin Morgan

President of Sales, US & Canada

Roberto Martinez

VP of Engineering

Alvaro Long

VP of Engineering

Hernandez Oliveira

VP of Engineering

Adrian Bizarro

VP of Engineering

Rodrigo Vargas

VP of Engineering

AGENDA

Hi Jessica, Welcome to the Encora Customer Advisory Board Summit 2025! Access your travel details and event information here.

18th March, 2025, Tuesday | 9:00 AM - 6:00 PM (PT)

9:00 AM - 9:30 AM

Welcome Reception

9:30 AM - 10:00 AM

Breakfast

10:00 AM - 10:30 AM

Registration & Introduction

10:30 AM - 11:00 AM

Overview of Encora CAB

11:00 AM - 11:30 AM

Building efficient and effective global engineering capabilities

11:30 AM - 12:00 PM

Break

12:00 PM - 12:30 PM

Building integrations of AI, Data, Cloud technologies, challenges & insights

12:30 PM - 1:00 PM

Lunch

1:00 PM - 2:00 PM

Maximizing Enterprise Value Through Engineering Services Partnerships

2:00 PM - 3:00 PM

Roundtable session: artificial intelligence, cybersecurity, cloud native, and more

3:00 PM - 3:30 PM

Wrap up, Next Steps and Close

TRAVEL DETAILS - KEVIN RILEY

Flight

Phoenix to San Francisco

FL 401

2025-03-17 18:00

San Francisco to Phoenix

FL 402

2025-03-18 18:00

Accommodation

Room Name

The Ritz Carlton, Half Moon Bay

Room Number

81149223

Check In

2025-03-17

Check Out

2025-03-18

Ground Transport Information

Arrival to Venue

Bus Stop

123456789

2025-03-17 18:00

Departure from Venue

Bus Stop

123456789

2025-03-18 18:00

Travel Details

Travel Details

2025-03-17 18:00

Travel Details

2025-03-18 18:00

VENUE

Hi Jessica, Welcome to the Encora Customer Advisory Board Summit 2025! Access your travel details and event information here.

The Ritz Carlton, Half Moon Bay

123456789

2025-03-17 18:00

CONTACT INFO

ENCORA

Customer Advisory Board

Organizing Committee

info@encora.com

Jessica Garcia

Research & Development

Kimberly Tschudi


Research & Development

Have Questions? Share Them in Advance

Submit your questions to the Encora Customer Advisory Board Summit 2025!

Submit

The only difference here is that the logged-in user is both the attendee and the admin, This allows them to edit travel details for anyone and access LinkedIn profiles by clicking the LinkedIn icon in the showcases.




Admin Screens

Admin Dashboard Overview:

Login & Navigation:

- Once you log in using your Admin credentials, you are redirected to the Admin Dashboard.
- This Admin Dashboard provides a quick overview of event statistics while enabling admins to manage attendees and events efficiently.


 Customer Advisory Board

Switch to Attendee ↩


Dashboard

Manage Attendees


Manage Events

 Admin Jessica Gamboa ▾


Admin Dashboard

 CAB Members

16

 Encora Leaders

10

 Upcoming Events

3

Ongoing Event

Event Name: **Encora CAB Summit March 2025** | Event Type: **Virtual** | Coordinator: **Jessica Gamboa, Kirsten Torchalski** | Date: **March 10-13, 2025** [View Event](#)




Event List

Upcoming 3

Completed 4

Draft 5

Upcoming Event List [View All](#)

Name	Type ▾	Event Date ▾	Created by	Status ▾	Attendees
CAB - Event 001	Virtual	02-17-2025 to 02-19-2025	Jessica Gamboa	Ongoing	
CAB - Event 002	Virtual	04-21-2025 to 04-25-2025	Kirsten Torchalski	Cancelled	
CAB - Event 003	Live	07-10-2025 to 07-12-2025	Jessica Gamboa	Upcoming	

Here we made minor adjustments to the header background and modified the layout of the event list grid.

When the user clicks on the Upcoming, Ongoing, or Completed buttons, the data will be displayed according to the selected option.

Clicking the Name in the event list grid or View Event Button it redirects the user to the Event Details page.

We use background colours to differentiate entries in the grid based on the Type and Status columns.

When the 'View All' button is clicked above the event list grid, the following screen appears.

Manage Events

1. Ongoing/Upcoming Events:

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Customer Advisory Board

Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Events

Manage Events

Add Event

Ongoing/Upcoming 3Completed 4Draft 5

Ongoing/Upcoming Event List

Cancel EventDeleteShow 05 Entries

Name	Type	Event Date	Created by	Status	Attendees	Action
CAB - Event 001	Virtual	02-17-2025 to 02-19-2025	Jessica Gamboa	Ongoing		
CAB - Event 002	Virtual	04-21-2025 to 04-25-2025	Kirsten Torchalski	Cancelled		
CAB - Event 003	Live	07-10-2025 to 07-12-2025	Jessica Gamboa	Upcoming		

Showing 3 out of 3 Records

Page 1 of 1

In the Manage Events section, the default selected tab is "Upcoming/Ongoing", where both upcoming and ongoing events are displayed. Users can delete any specific event by selecting it from the list.

The Upcoming/Ongoing events grid includes the following columns: Name, Type, Event Date, Created By, Status, Attendees, and Action. New events can be added by clicking the "Add Event" button.

2. Completed Events:

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Customer Advisory Board

Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Events

Manage Events

Add Event

Ongoing/Upcoming 3Completed 4Draft 5

Completed Event List

Show 04 Entries

Name	Type	Event Date	Created by
CAB - Event Contrary to popular belief, Lorem 001	Virtual	09-25-2024 to 09-27-2024	Jessica Gamboa
CAB - Event Lorem Ipsum is simply dummy text printing 002	Live	12-15-2024 to 12-16-2024	Kirsten Torchalski
CAB - Contrary to popular belief, Lorem Ipsum is not simply random text. It has roots in a piece of classicalEvent 003	Live	01-08-2025 to 01-10-2025	Jessica Gamboa
CAB - Event Lorem Ipsum is simply dummy text printing 004	Virtual	03-02-2025 to 03-03-2025	Jessica Gamboa

Showing 4 out of 4 Records

Page 1 of 1

To view the completed events, click the "Completed" tab.

The Completed events grid displays only the following columns: Name, Type, Event Date, and Created By.

Delete and Cancel options are not available in this section.

3. Draft Events:

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Customer Advisory Board

Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Events

Manage Events

Add Event

Ongoing/Upcoming3

Completed4

Draft5

Draft Event List

Delete

Show05Entries

Name	Type	Event Date	Created by	Attendees	Action
<input checked="" type="radio"/> CAB - Event 015	Virtual	03-15-2025 to 03-17-2025	Jessica Gamboa		
<input type="radio"/> CAB - Event 016	Virtual	05-07-2025 to 05-08-2025	Kirsten Torchalski		
<input type="radio"/> CAB - Event 018	Live	07-20-2025 to 07-21-2025	Jessica Gamboa		
<input type="radio"/> CAB - Event 019	Live	09-16-2025 to 09-18-2025	Kirsten Torchalski		
<input type="radio"/> CAB - Event 021	Virtual	12-19-2025 to 12-21-2025	Kirsten Torchalski		

Showing 4 out of 4 Records

Page1 of 1

To view drafts, click the "Drafts" tab.

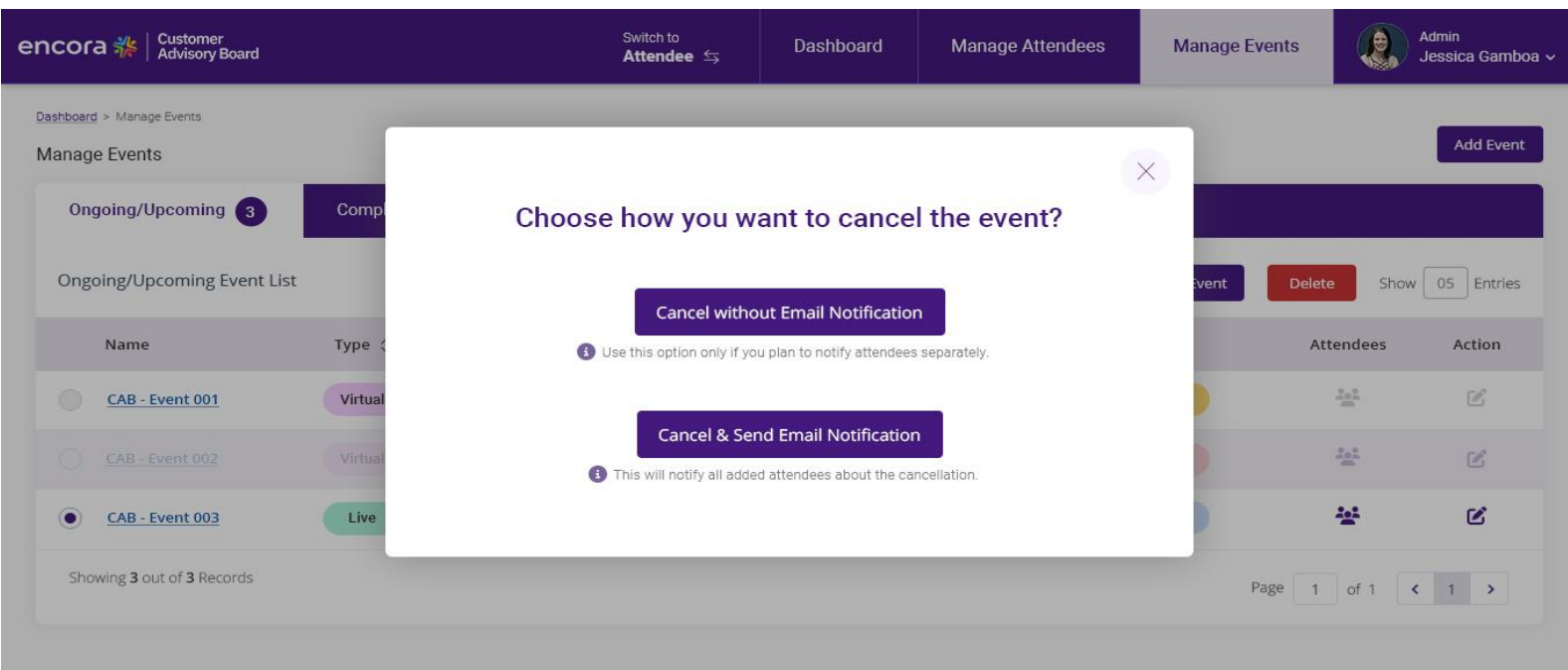
The Drafts grid includes the columns: Name, Type, Event Date, Created By, Attendees, and Action.

In this section, only the Delete option is provided.

Users can cancel any specific event by selecting it from the list.

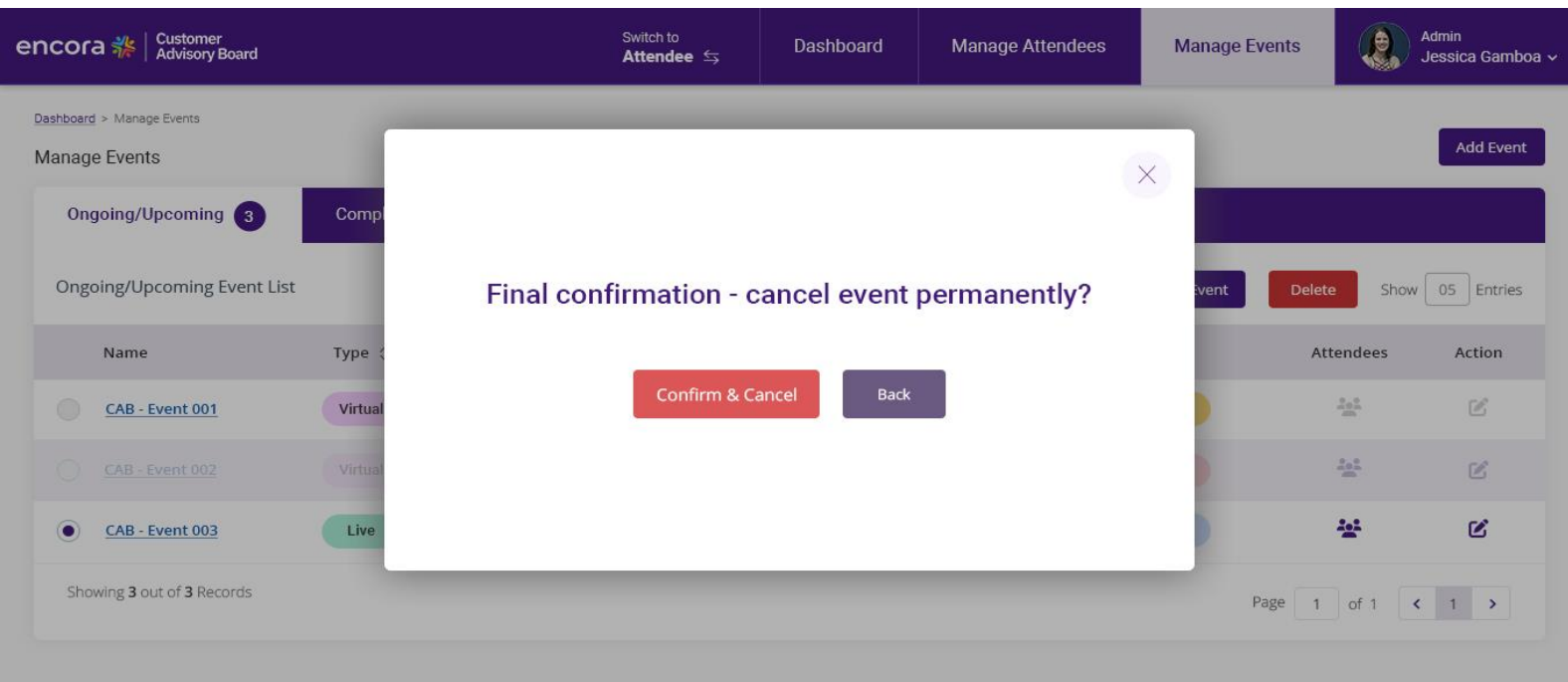
In this Manage Events section, when a user clicks the **Cancel Event** button, a confirmation popup will appear as shown below.

4. Cancel Event:



- **Cancel Without Email Notification** – Use this option only if you plan to notify attendees separately.
- **Cancel & Send Email Notification** – This option will notify all added attendees about the cancellation.

When any option is selected, a final confirmation popup will appear, as shown below.

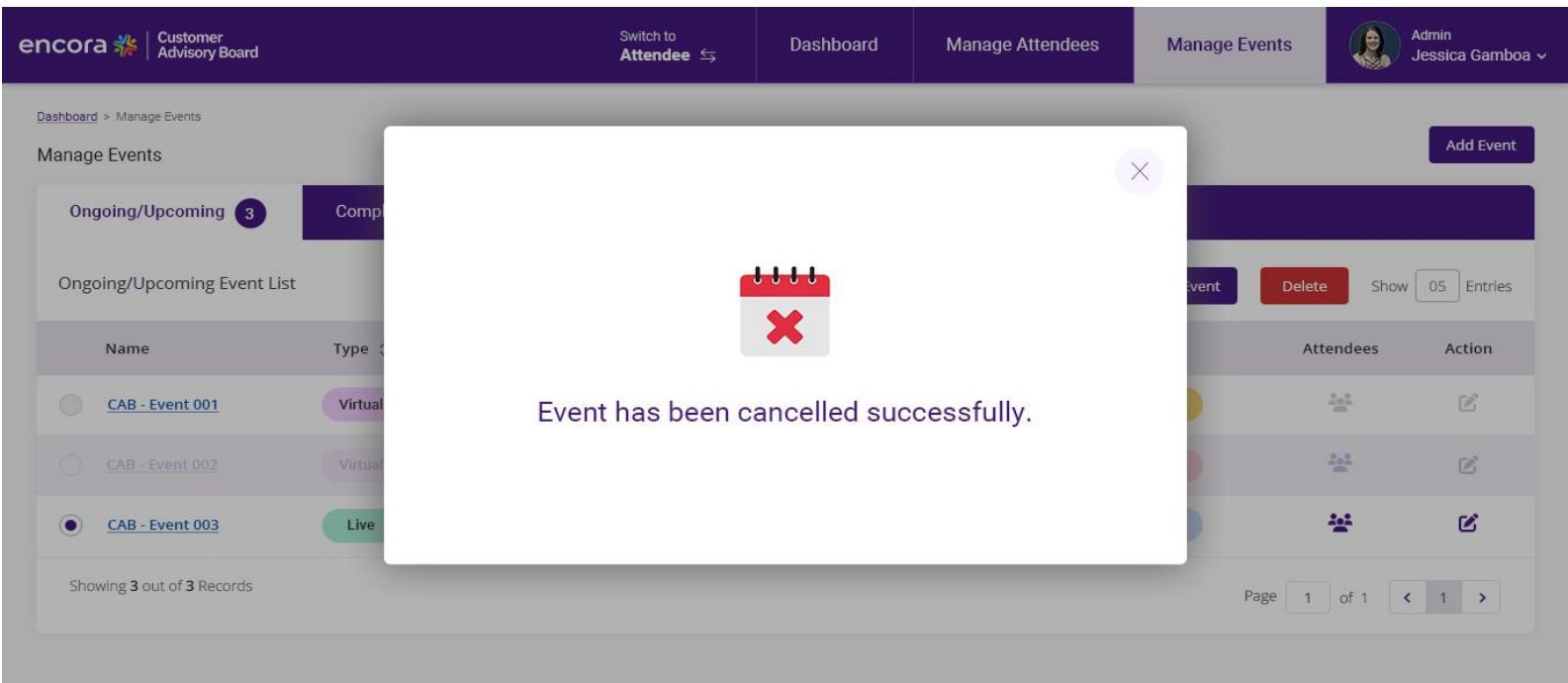


This popup contains two buttons: **Confirm** and **Back**.

Clicking **Back** will return you to the previous notification popup.

Clicking **Confirm** will permanently cancel the event.

Event Cancelled Successfully



After the event is cancelled, a new popup will appear displaying a confirmation message: **"Event has been cancelled successfully."**

Attendee Mapping Screen

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Customer Advisory Board

Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Events > Attendee Mapping

Attendee Mapping

Event Details

Event Name: **Encora CAB Summit March 2025** | Event Type: **Live** | Start Date: **10 March, 2025** | End Date: **13 March, 2025**

Map Attendees

Search Attendee Name:

CE

Searched Attendee List

Add Attendee

Show 05 Entries

<input checked="" type="checkbox"/>	First Name	Last Name	Designation	Organization
<input checked="" type="checkbox"/>	Kevin	Riley	CTO & SVP, Technology & Innovation	Avid Technology
<input checked="" type="checkbox"/>	Anand	Birje	CEO	Encora
<input checked="" type="checkbox"/>	Matt	Diamond	CIO	McAfee
<input checked="" type="checkbox"/>	Manish	Jaiswal	Chief Product & Technology Officer	Concentric
<input checked="" type="checkbox"/>	Rohit	Nichani	President Hitech, Retail & CPG and Energy & Utilities	Encora

Showing 5 out of 30 Entries

Page 1 of 4

Mapped CAB Attendee List

Remove Attendee

Show 05 Entries

<input type="checkbox"/>	#	First Name	Last Name	Designation	Organization
<input type="checkbox"/>	1	Kevin	Riley	CTO & SVP, Technology & Innovation	Avid Technology
<input type="checkbox"/>	2	Todd	Ellermann	SVP of Engineering	Imagine Learning
<input type="checkbox"/>	3	Matt	Diamond	CIO	McAfee
<input type="checkbox"/>	4	Manish	Jaiswal	Chief Product & Technology Officer	Concentric
<input type="checkbox"/>	5	Niels	Fache	VP and GM	Keysight

Showing 5 out of 16 Entries

Page 1 of 4

Mapped Encora Attendee List

Remove Attendee

Show 05 Entries

<input type="checkbox"/>	#	First Name	Last Name	Designation	Organization
<input type="checkbox"/>	1	Anand	Birje	CEO	Encora
<input type="checkbox"/>	2	Lalit	Wadhwa	CTO & EVP	Encora
<input type="checkbox"/>	3	Joshua	Kanter	CMO	Encora
<input type="checkbox"/>	4	Rohit	Nichani	President HiTech, Retail & CPG and Energy & Utilities	Encora
<input type="checkbox"/>	5	Roberto	Martinez	President Travel, Hospitality and Logistics	Encora

Showing 5 out of 14 Entries

Page 1 of 3


Close

No modifications have been made to the Attendee Mapping screen; it remains the same as in Phase 1.

Add Event Screen

1. Basic Event Details:

When the "Add Event" button is clicked on the Manage Events screen, the user is redirected to the Add Event screen. The first step on this screen is Basic Event Details.


 Customer Advisory Board

Switch to Attendee ↗

Dashboard

Manage Attendees

Manage Events

 Admin Jessica Gamboa ▾

[Dashboard](#) > [Manage Events](#) > Add Event

Add Event

Basic Event Details

* Event Title

Type Event Title here...

* Event Type

Live Event ▾

* Select Template

Default Template ▾

* Event Start Date

21/04/2025 📅

* Event End Date

23/04/2025 📅

* Select Time Zone

Washington, DC, USA (GMT-5) ▾

Welcome Text

Type your text here

0/150

Save & Next

Cancel

where all mandatory fields must be filled. After completing the required information, clicking the "Save & Next" button will save the data and proceed to the next step: Agenda Details.

If the Cancel button is clicked at any point, the user is redirected back to the Manage Events screen.

2. Add Agenda & View/ Upload Reference Documents:

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Customer Advisory Board

Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Events > Add Event

Add Event

Add Agenda

Template Name: Default Template | Event Type: Live

Monday, April 21, 2025 | 5:00 PM - 9:00 PM (Washington, DC, USA (GMT-5))

Skip Day

05:00 PM

07:00 PM

-

Welcome ...

07:00 PM

09:00 PM

-

Dinner

Add Agenda Item

Tuesday, April 22, 2025 (Washington, DC, USA (GMT-5))

Skip Day

00:00 AM

00:00 AM

-

Add Agenda Item

Wednesday, April 23, 2025 | 10:30 AM - 03:30 PM (Washington, DC, USA (GMT-5))

Skip Day

10:30 AM

11:30 AM

-

Introduction

11:30 AM

01:00 PM

-

Session Topic - 002

Add Agenda Item

View/Upload Reference Documents

Drag & drop files or [browse](#)

Uploaded Reference Documents (5)

Delete

Show 5 Rows

	Name	Type
<input type="checkbox"/>	Cab 01 - Instructions Guide for Event Lorem ipsum.pdf	.pdf
<input type="checkbox"/>	Event CB 002 - Lorem ipsum dollar sit amet.mp4	.mp4
<input type="checkbox"/>	Enc Sep 2025 - Contrary to popular belief, Lorem ipsum.xlsx	.xlsx
<input type="checkbox"/>	Default Enc Event Dec 2025 - Sed ut perspiciatis unde.mp3	.mp3
<input type="checkbox"/>	New Enc CB Event Jan 2026.docx	.docx

Showing 5 out of 5 Records

Page 1 of 1

Save & Next

Back

In the Agenda section, the "Exclude" checkbox has been renamed to "Skip Day", and each section now includes expand/collapse functionality.

Users can add, edit, or delete agenda items. Additionally, reference documents can be uploaded in various formats such as .mp4, .pdf, .xlsx, .mp3, and .docx.

These uploaded documents are displayed in the Upload Reference Documents Grid, which includes two columns: File Name and File Type/Extension.

Based on the file type, corresponding file names are shown next to the icons. A multi-select option is available for deleting uploaded documents.

To modify or view Basic Event Details, users can click the Back button. If the event is cancelled after completing only the first step, it will be saved under Draft Events. To move to the next step, the user must click Save & Next.

3. Add Travel Details:

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Customer Advisory Board

Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Events > Add Event

Add Event

Add Travel Detail Fields

Template Name: Default Template | Event Type: Live

Flight Details

Field Name

Inbound Flight

Field Type

Alphanumeric

Field Name

Outbound Flight

Field Type

Select Field Type

Field Name

Type Field Name...

Field Type

Select Field Type

+ Add Field

Accommodation

Field Name

Hotel Name

Field Type

Alphanumeric

Field Name

Reservation Number

Field Type

Numeric

Field Name

Check-in

Field Type

Numeric

Field Name

Check-out

Field Type

Numeric

Field Name

Check-out

Field Type

Numeric

Field Name

Type Field Name...

Field Type

Select Field Type

+ Add Field

Ground Transport Information

Arrival to Venue

Field Name

Booking Number

Field Type

Numeric

Field Name

Date/Time

Field Type

Date Picker

Field Name

Pick-up Location

Field Type

Alphanumeric

Field Name

Drop-off Location

Field Type

Alphanumeric

Field Name

Type Field Name...

Field Type

Select Field Type

+ Add Field

Departure from Venue

Field Name

Booking Number

Field Type

Numeric

Field Name

Date/Time

Field Type

Date Picker

Field Name

Pick-up Location

Field Type

Alphanumeric

Field Name

Drop-off Location

Field Type

Alphanumeric

Field Name

Type Field Name...


Field Type

Select Field Type

+ Add Field

Save & Next

Back



In the Travel Details section, users must fill in flight information such as Inbound and Outbound flight details. Additional fields can be added using the Add Field button, and inline Edit and Delete options are provided for updates.

The following step is Accommodation Details, where users provide information like Hotel Name, Reservation Number, Check-in, and Check-out dates. Additional fields can also be added here using the Add Field button, and inline edit/delete options are available.

Next is the Ground Transport Information section, which includes two sub-sections: **Arrival to Venue** and **Departure from Venue**. Here, users must fill in details such as Booking Number, Date, Pickup Location, and Drop-off Location. As before, Add Field, Edit, and Delete options are available.

Once all information is filled in, clicking **Save & Next** leads to the **Venue Details** section

4. Add Venue Details:

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Customer Advisory Board

Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Events > Add Event

Add Event

Add Venue Details

Template Name: Default Template | Event Type: Live

* Venue Name

The Ritz-Carlton, Half Moon Bay

Description

Type your text here


0/150

* Upload Venue Image

File name


Browse

Upload



* Venue Map Link

https://maps.app.goo.gl/VKpsNPc8zTL8w4MW6




Save & Next

Back

In the Venue Details Section Mandatory fields here include **Venue Name**, **Venue Image Upload**, and **Venue Map Link**.

The uploaded image and link are displayed below their respective input fields. To proceed to the **Contact Info** section, click **Save & Next**.



5. Contact Info Details:

The Contact Info screen remains unchanged from Phase 1, except for a new feature allowing users to edit the Organization Committee’s email by clicking the pencil icon.

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Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Events > Add Event

Add Event

Add Contact Info

Organizing Committee Email:

cab@encora.com

Select Event Coordinator:

Jessica Gamboa

1

in

Jessica Gamboa

Manager, Commercial Campaigns

Jessica.Gamboa@encora.com

Contact Number: +1 480 991 3635

2

in

Kirsten Torchalski

Director, Partnership Marketing

Kirsten.Torchalski@encora.com

Contact Number: +1 480 991 3635

Save Event

Back

After making changes, click the check mark to save. Users can also view LinkedIn profiles by clicking the LinkedIn icon on the event coordinator cards.

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Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Events > Add Event

Add Event

Add Contact Info

Organizing Committee Email:

cab@encora.com

Select Event Coordinator:

Jessica Gamboa

1

in

Jessica Gamboa

Manager, Commercial Campaigns

Jessica.Gamboa@encora.com

Contact Number: +1 480 991 3635

2

in

Kirsten Torchalski

Director, Partnership Marketing

Kirsten.Torchalski@encora.com

Contact Number: +1 480 991 3635

Save Event

Back

Finally, clicking the "Save Event" button triggers a confirmation popup stating:
"Event has been created successfully."

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Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Events > Add Event


Add Event

Add Contact Info

Organizing Committee Email:
cab@encora.com

Select Event Coordinator:
Jessica Gamboa

1



Jessica G

Manager, C

Jessica.Ga

Contact Nu

Event has been created successfully.

By clicking on below map attendees button, you can map attendees for newly created event "CAB June 2025 Summit"

Map Attendees

Save Event

Back

By clicking on below map attendees button, you can map attendees for newly created event. To add an attendee, click the "Manage Attendees" button located in the header.

Manage Attendees

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Customer Advisory Board

Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Attendees

Manage Attendees











Attendee List

Organization Filter All

Add Attendee

Delete

Show 05 Entries

First Name	Last Name	Designation	Organization	Action
<input type="radio"/> Kevin	Riley	CTO & SVP, Technology & Innovation	Avid Technology	 
<input type="radio"/> Anand	Birje	CEO	Encora	 
<input type="radio"/> Matt	Diamond	CIO	McAfee	 
<input type="radio"/> Manish	Jaiswal	Chief Product & Technology Officer	Concentric	 
<input type="radio"/> Rohit	Nichani	President Hitech, Retail & CPG and Energy & Utilities	Encora	 

Showing 5 out of 33 Entries

Page 1 of 7

<

1

2

...

7

>

In the Manage Attendees screen, When the user clicks the **Add Attendee** button, the Add Attendee form will open. At the top of the form, there is a **Select Attendee Type** dropdown with two options: **CAB Member** and **Encora Leader**.

If **CAB Member** is selected, additional fields such as **Organization Name** and **Upload Profile Photo** will be displayed.

The screenshot shows the 'Add Attendee' form in the 'Manage Attendees' section. The 'Select Attendee Type' dropdown is set to 'CAB Member'. The form includes fields for First Name, Last Name, Designation, Official Email Address, LinkedIn Profile URL, and Organization Name. There are also upload buttons for Profile Photo and Organization Logo, each with a 'Browse' button and a 'Preview' area. The form is titled 'Add Attendee' and has 'Submit' and 'Cancel' buttons at the bottom.

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Switch to Attendee

Dashboard Manage Attendees Manage Events

Admin Jessica Gamboa

Dashboard > Manage Attendees > Add Attendee

Add Attendee

* Select Attendee Type: CAB Member

* Organization Name:

* First Name:

* Last Name:

* Designation:

* Official Email Address:

LinkedIn Profile URL:

* Upload Profile Photo:

File Name Browse

Max File Size: 1 MB, Supported File Formats: jpg, png

Profile Photo Preview

Organization Logo

File Name Browse

Max File Size: 1 MB, Supported File Formats: jpg, png

Organization Logo Preview

Submit Cancel

If **Encora Leader** is selected, the additional field shown is **Organization Logo**.

The screenshot shows the 'Add Attendee' form in the 'Manage Attendees' section. The 'Select Attendee Type' dropdown is set to 'Encora Leader'. The form includes fields for First Name, Last Name, Designation, Official Email Address, LinkedIn Profile URL, and Organization Logo. There are also upload buttons for Profile Photo and Organization Logo, each with a 'Browse' button and a 'Preview' area. The form is titled 'Add Attendee' and has 'Submit' and 'Cancel' buttons at the bottom.

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Switch to Attendee

Dashboard Manage Attendees Manage Events

Admin Jessica Gamboa

Dashboard > Manage Attendees > Add Attendee

Add Attendee

* Select Attendee Type: Encora Leader

* First Name:

* Last Name:

* Designation:

* Official Email Address:

LinkedIn Profile URL:

* Upload Profile Photo:

File Name Browse

Max File Size: 1 MB, Supported File Formats: jpg, png

Profile Photo Preview

Organization Logo: encora

Submit Cancel

The remaining fields are the same for both options: **First Name**, **Last Name**, **Designation**, **Office Email Address**, **LinkedIn Profile URL**, and **Upload Profile Photo**.

View Attendee:

The Manage Attendees screen remains the same as in Phase 1, with one key update: in the Attendee List Grid, the Action column now includes a View icon, which allows you to view the attendee's profile details.

Clicking this icon redirects you to the Attendee Profile Details screen.

Attendee Profile Details:

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Customer Advisory Board

Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Attendees > Attendee Profile Details

Attendee Profile Details

Attendee Name: Kevin Riley

Designation: CTO and SVP of Technology & Innovation

Organization Name: Avid

Email ID: kevin.riley@avid.com

Linkedin ID:

https://www.linkedin.com/in/loremipsum/user-name001

Event List (8)

Show 05 Entries

Name	Type	Start Date	End Date	Status	Queries Asked
CAB - Lorem Ipsum is simply dummy text Event 001	Virtual	12-17-2024	12-19-2024	Completed	?
CAB - Contrary to popular belief, Lorem Ipsum is simply text. It has roots in a piece of classicalEvent 003	Virtual	01-05-2025	01-06-2025	Completed	?
CAB - Sed ut perspiciatis unde omnis iste natus Event 003	Live	03-10-2025	03-12-2025	Ongoing	?
CAB - vero eos et accusamus et iusto odio dignissimos Event 004	Virtual	06-17-2025	06-17-2025	Upcoming	?
CAB - Event 005	Live	09-21-2025	09-22-2025	Upcoming	?

Showing 5 out of 8 Entries

Page 1 of 2

On the Attendee Profile Details screen, the attendee's basic information is displayed above the event list grid.

This includes the attendee's name, designation, profile picture, logo, email, LinkedIn ID, and organization name.

In the Event List Grid, each event name is hyperlinked. Clicking on the name redirects you to the corresponding Event Details page.

Additionally, there's an option to view the list of questions for each event by clicking the question mark icon in the "Queries Asked" column.

Queries Asked:

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Customer Advisory Board

Switch to Attendee

Dashboard

Manage Attendees

Manage Events

Admin Jessica Gamboa

Dashboard > Manage Attendees > Attendee Profile Details

Attendee Profile Details

Event List (8)

Name
CAB - Lorem Ipsum
CAB - Contrary to popular belief, Lorem Ipsum is not simply random text. It has roots in a piece of classical Latin literature from 45 BC, making it over 2000 years old. Richard McClintock, a Latin professor?
CAB - Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam?
CAB - vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident similique sunt in culpa qui officia deserunt mollitia?
CAB - Event 005

Showing 5 out of 8 Entries

Page 1 of 2

Queries Asked (6)

Event Name: CAB - Lorem Ipsum is simply dummy text Event 001

1

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque aliquam viverra lacus. Curabitur in ante sit amet nisi porta semper sed vel justo. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas?

03-10-2025, 11:25 AM

2

Contrary to popular belief, Lorem Ipsum is not simply random text. It has roots in a piece of classical Latin literature from 45 BC, making it over 2000 years old. Richard McClintock, a Latin professor?

03-10-2025, 11:25 AM

3

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam?

03-10-2025, 11:25 AM

4

At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident similique sunt in culpa qui officia deserunt mollitia?

03-10-2025, 11:25 AM

Live

09-21-2025

09-22-2025

Upcoming

When the Queries Asked popup appears, it displays the event name along with a list of questions, each shown with its respective date and time.