

# 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.

The screenshot shows the Encora Attendee Dashboard. At the top, there's a navigation bar with the Encora logo, "Customer Advisory Board", "Switch to Admin", "Dashboard", and a profile picture for "Attendee Jessica Gamboa". Below the header, the dashboard has three main sections: "Upcoming Events" (4), "Ongoing Events" (1), and "Completed Events" (12). Under "Ongoing Events", there's a callout for "Encora CAB Summit March 2025" with details like "Event Type: Virtual", "Coordinator: Jessica Gamboa, Kirsten Torchalski", and "Date: March 18-19, 2025". A "View Event" button is also present. The "My Events" section allows switching between "Upcoming" (4) and "Completed" (12) events. The "Upcoming Event List" table includes columns for Name, Type, Start Date, End Date, Coordinator/s, and Reference Documents. It lists four events: "CAB - vero eos et accusamus et iusto odio dignissimos Event 004" (Live, 03-10-2025 to 03-12-2025, Coordinators: Jessica Gamboa, John Smith), "CAB - Contrary to popular belief, Lorem Ipsum is simply text. It has piece of classical Event 003" (Cancelled, Virtual, 04-21-2025 to 04-25-2025, Coordinator: John Anderson), "CAB - Lorem Ipsum is simply dummy text Event 001" (Virtual, 07-10-2025 to 07-12-2025, Coordinator: John Anderson), and "CAB 09 - vero eos et accusamus et iusto odio dignissimos Event 022" (Live, 08-22-2025 to 08-25-2025, Coordinator: Jessica Gamboa). The bottom of the page shows pagination: "Showing 4 of 4 Events", "Page 1 of 1", and navigation arrows.

### 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

[Dashboard](#) > Reference Documents

## Reference Documents

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

Reference Document List (5)

Show  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  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 2025! Access your travel details and event information here.

**ENCORA CUSTOMER ADVISORY BOARD**

**Event Detail**

**CUSTOM ADVISORY BOARD MEMBERS**

Paul Miller VP of Sales <b>APTIV</b>	Karen Riley Director of Engineering & Innovation <b>AVIATION</b>	Brian Kirkland Chief Insurance Officer <b>CHOICE</b>	Andy Holloman Head of Ops <b>CLOUD</b>
Michael Jelinek Global Product & Technology Officer <b>CONTANTINO</b>	Drew Neuman VP of Sales <b>DELTASOURCES</b>	Paul Stodel President, Premier Business Unit <b>HEDDLE</b>	Brian Sieber Head of Sales US <b>HISCOX</b>
Todd Elermann SVP of Engineering <b>IMAGINE INTELLIGENCE</b>	Nico Paché VP of Sales <b>KEYSIGHT</b>	Matt Diamond CIO <b>McAfee</b>	Thomas Harris Head of Innovation, Technology and Security <b>PHILIPS</b>
Juan Jose Piquardo Vice President, Latin America <b>Scotiabank</b>	Val Manchessky Head of Engineering <b>Uber Freight</b>	Kumar Ramasathan CEO <b>Velocity Global</b>	Brad Campani SVP Software Engineering <b>VERTEX</b>

**ENCORA LEADERS**

Anand Raja CEO Anand Raja, Inc. <b>encora</b>	Latif Mawlawi CIO & COO Latif Mawlawi, Inc. <b>encora</b>	Jonathon Kastner CTO Jonathon Kastner, Inc. <b>encora</b>	Stefan Niedzwiedz President of Product, Sales & Marketing Stefan Niedzwiedz, Inc. <b>encora</b>
Robert Martineau President, North America Robert Martineau, Inc. <b>encora</b>	Alvin Liang President, Business and Technology Alvin Liang, Inc. <b>encora</b>	Henrique Oliveira SVP, Finance, Model Henrique Oliveira, Inc. <b>encora</b>	Adriano Bludaru SVP, General Counsel Adriano Bludaru, Inc. <b>encora</b>
Rodrigo Vargas VP of E&LAM, Age Group Rodrigo Vargas, Inc. <b>encora</b>			

**AGENDA**

Date: March 18-19, 2025 | Location: The Ritz Carlton, Half Moon Bay

**18<sup>th</sup> March, 2025, Tuesday : 8:30 PM - 9:30 PM (PST)**

5:30 PM – 7:00 PM      Welcome Reception  
7:00 PM – 9:30 PM

**19<sup>th</sup> March, 2025, Wednesday : 7:30 AM - 5:30 PM (PST)**

7:00 AM – 8:00 AM      Breakfast  
8:00 AM – 9:00 AM      Welcome & Introduction  
9:00 AM – 10:00 AM      Overview of Encora CxO  
10:00 AM – 11:00 AM      Break  
11:00 AM – 12:00 PM      Scaling adoption of AI, Data, Cloud technologies, challenges & insights  
12:00 PM – 1:00 PM      Lunch  
1:00 PM – 2:00 PM      Maximizing Enterprise Value through Engineering Services Partnership  
2:00 PM – 3:00 PM      Session on 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**

Inbound Flight	FL 001	2024-09-17 16:00
Outbound Flight	FL 002	2024-09-18 16:00

**Accommodation**

Hotel Name	The Ritz Carlton, Half Moon Bay
Reservation Number	81198452
Check In	2024-09-17
Check Out	2024-09-18

**Ground Transport Information**

Arrived to Venue	Booking Number	1234567890
	Date / Time	2024-09-17 16:00
Flight/Arrival	Drop-off Location	1 La Costa Avenue, Millbrae, CA
	Drop-off Location	The Ritz Carlton, Half Moon Bay

**VENUE**

The Ritz Carlton, Half Moon Bay

With stunning Pacific Ocean views, The Ritz Carlton, Half Moon Bay offers a luxurious experience just 20 miles from San Francisco International Airport. This Forbes Five-Star resort is renowned for its breathtaking rooms, exceptional service and unique fine dining.

**CONTACT INFO**

**Event Coordinators (2)**

	Jessica Gambaro Manager, Customer Experience +204-123-0000
	Kristen Tronholzki Executive Partnership Marketing +1 800 999 3322

**Have Questions? Share Them in Advance**

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

**Submit**

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

The screenshot displays the Encora CAB Summit March 2025 event detail page. At the top, a welcome message reads: "Hi Kevin, Welcome to the Encora Customer Advisory Board Summit 2025! Access your travel details and event information here." Below this is a featured event venue image of "Encora CAB Summit March 2025" at "The Ritz-Carlton, Half Moon Bay". The page is divided into several sections:

- CUSTOMER ADVISORY BOARD MEMBERS:** A grid of 16 member profiles from various companies like APTIV, CHOICE, GoDaddy, and McAfee.
- ENCORA LEADERS:** A grid of 8 leader profiles from companies like encora, AT&T, and Vertex.
- AGENDA:** A detailed agenda for the 18th March 2025 meeting, including sessions like "Welcome Reception", "Keynote Address", and "Breakout Session: Maximizing Enterprise Value through Engineering Services Partnership".
- TRAVEL DETAILS - KEVIN RILEY:** An edit form for Kevin Riley's travel details, showing flight, ground transport, and accommodation information.
- VENUE:** Information about the venue, "The Ritz-Carlton, Half Moon Bay", located in Half Moon Bay, California.
- CONTACT INFO:** A section listing "Event Coordinators (2)" with their names and contact details.
- Have Questions? Share Them in Advance:** A section for users to share questions in advance.

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.

The screenshot displays the Encora Customer Advisory Board Summit 2025 event detail page. At the top, it says "Hi Jessica, Welcome to the Encora Customer Advisory Board Summit - 2025! Access your travel details and event information here." Below this, there are sections for "CUSTOMER ADVISORY BOARD MEMBERS" (a grid of logos and profiles for various companies like APTIV, CHOICE, GoDaddy, McAfee, etc.), "ENCORA LEADERS" (a grid of profiles for leaders like Arnaud Bille, Lain Weatherhead, Joshua Kanter, and others), and "AGENDA" (a detailed schedule for the March 18-19 event). The "TRAVEL DETAILS" section for Kevin Riley includes flight info (Inbound Flight FL-001 2024-09-17 10:00, Outbound Flight FL-002 2024-09-18 16:00), accommodation (The Ritz Carlton, Half Moon Bay), and ground transport (Arrival at Venue: 123456789, Booking Number: 123456789, Date / Time: 2024-09-17 10:00, Pick-up Location: 1 La Côte Avenue, Millbrae, CA, End of Excursion: The Ritz Carlton, Half Moon Bay). The "VENUE" section shows a photo of The Ritz Carlton, Half Moon Bay and a map of the area. The "CONTACT INFO" section lists two event coordinators: Jessica Gambrell (jessica.gambrell@encora.com) and Kristen Tschalicki (kristen.tschalicki@encora.com).

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.

The screenshot shows the Encora Admin Dashboard. At the top, there's a navigation bar with the Encora logo, 'Customer Advisory Board', a 'Switch to Attendee' button, and links for 'Dashboard', 'Manage Attendees', 'Manage Events', and a user profile for 'Admin Jessica Gamboa'. Below the header is a summary section with icons and counts: 'CAB Members 16', 'Encora Leaders 10', and 'Upcoming Events 3'. An 'Ongoing Event' card displays details for the 'Encora CAB Summit March 2025' event. The main area is titled 'Event List' with filters for 'Upcoming' (3), 'Completed' (4), and 'Draft' (5). The 'Upcoming Event List' grid shows three entries: 'CAB - Event 001' (Virtual, Ongoing), 'CAB - Event 002' (Virtual, Cancelled), and 'CAB - Event 003' (Live, 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:

Screenshot of the Manage Events section showing the "Ongoing/Upcoming" tab selected. The grid displays three events: CAB - Event 001 (Virtual, Ongoing), CAB - Event 002 (Virtual, Cancelled), and CAB - Event 003 (Live, Upcoming). Each event has a status badge, a thumbnail, and edit/cancel/delete icons.

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		

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:

Screenshot of the Manage Events section showing the "Completed" tab selected. The grid displays four completed events: CAB - Event Contrary to popular belief, Lorem 001 (Virtual, 09-25-2024 to 09-27-2024), CAB - Event Lorem Ipsum is simply dummy text printing 002 (Live, 12-15-2024 to 12-16-2024), 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), and CAB - Event Lorem Ipsum is simply dummy text printing 004 (Virtual, 03-02-2025 to 03-03-2025).

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

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:**

The screenshot shows the encora Customer Advisory Board interface. At the top, there's a navigation bar with the encora logo, 'Customer Advisory Board', and links for 'Switch to Attendee', 'Dashboard', 'Manage Attendees', 'Manage Events', and a user profile for 'Admin Jessica Gamboa'. Below the navigation bar, the page title is 'Manage Events' with a 'Add Event' button. The main content area has tabs for 'Ongoing/Upcoming' (3), 'Completed' (4), and 'Draft' (5), with the 'Draft' tab currently selected. The 'Draft Event List' table has columns for Name, Type, Event Date, Created by, Attendees, and Action. There are five rows in the table, each representing a draft event named 'CAB - Event 015' through 'CAB - Event 021', with details like Virtual/Live type, dates from 2025, and created by Jessica Gamboa or Kirsten Torchalski. A 'Delete' button is visible at the top right of the table. At the bottom, it says 'Showing 4 out of 4 Records' and includes a page navigation bar.

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

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:

The screenshot shows the encora Customer Advisory Board interface. At the top, there's a navigation bar with links for 'Switch to Attendee', 'Dashboard', 'Manage Attendees', 'Manage Events', and a user profile for 'Admin Jessica Gamboa'. Below the navigation is a breadcrumb trail 'Dashboard > Manage Events' and a button 'Add Event'. The main content area is titled 'Manage Events' and shows an 'Ongoing/Upcoming Event List' with three entries: 'CAB - Event 001' (Virtual), 'CAB - Event 002' (Virtual), and 'CAB - Event 003' (Live). A modal dialog is open in the center, titled 'Choose how you want to cancel the event?'. It contains two options: 'Cancel without Email Notification' (with a note: 'Use this option only if you plan to notify attendees separately.') and 'Cancel & Send Email Notification' (with a note: 'This will notify all added attendees about the cancellation.'). The background shows a table with columns 'Attendees' and 'Action'.

- **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.

The screenshot shows the encora Customer Advisory Board interface with a similar layout to the previous one. A modal dialog is centered, titled 'Final confirmation - cancel event permanently?'. It features two buttons: a red 'Confirm & Cancel' button and a blue 'Back' button. The background shows the same 'Manage Events' list and table as the previous screenshot.

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

The screenshot shows the encora Customer Advisory Board interface. At the top, there's a navigation bar with links for 'Dashboard', 'Manage Attendees', 'Manage Events', and a user profile for 'Admin Jessica Gamboa'. Below the navigation bar is a breadcrumb trail: 'Dashboard > Manage Events'. The main content area is titled 'Manage Events' and shows an 'Ongoing/Upcoming Event List'. There are three events listed: 'CAB - Event 001' (Virtual), 'CAB - Event 002' (Virtual), and 'CAB - Event 003' (Live). The third event is selected. A modal window is overlaid on the page, featuring a red calendar icon with a large red X and the text 'Event has been cancelled successfully.'.

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

# Attendee Mapping Screen

encora 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:  Search

<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

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**Mapped CAB Attendee List**

<input type="checkbox"/>	#	First Name	Last Name	Designation	Organization
<input type="checkbox"/>	1	Kevin	Riley	CTO & SVP, Technology & Innovation	Avid Technology
<input checked="" 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

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**Mapped Encora Attendee List**

<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

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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.

The screenshot shows the encora Customer Advisory Board interface. At the top, there's a navigation bar with the encora logo, 'Customer Advisory Board', and links for 'Switch to Attendee', 'Dashboard', 'Manage Attendees', 'Manage Events', and a user profile for 'Admin Jessica Gamboa'. Below the navigation bar, the URL 'Dashboard > Manage Events > Add Event' is visible. The main content area is titled 'Add Event' and contains a form for 'Basic Event Details'. The form includes fields for 'Event Title' (with placeholder 'Type Event Title here...'), 'Event Type' (dropdown menu showing 'Live Event'), 'Select Template' (dropdown menu showing 'Default Template'), 'Event Start Date' (set to '21/04/2025') and 'Event End Date' (set to '23/04/2025'), and 'Select Time Zone' (dropdown menu showing 'Washington, DC, USA (GMT-5)'). Below the form is a 'Welcome Text' section with a text input field ('Type your text here') and a character count indicator '0/150'. At the bottom are 'Save & Next' and 'Cancel' buttons.

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:

Screenshot of the encora Customer Advisory Board interface showing the "Add Event" process.

The top navigation bar includes: encora Customer Advisory Board, Switch to Attendee, Dashboard, Manage Attendees, Manage Events, Admin Jessica Gamboa, and a user profile icon.

The breadcrumb path: Dashboard > Manage Events > Add Event

The "Add Event" section has the following details:

- Add Agenda**: Template Name: Default Template | Event Type: Live
- Monday, April 21, 2025 | 5:00 PM - 9:00 PM (Washington, DC, USA (GMT-5))**
  - Agenda items: Welcome ... (05:00 PM - 07:00 PM) and Dinner (07:00 PM - 09:00 PM)
  - Action buttons: Skip Day, Edit, Delete, and a pencil icon.
- Tuesday, April 22, 2025 (Washington, DC, USA (GMT-5))**
  - Agenda item: (00:00 AM - 00:00 AM)
  - Action buttons: Skip Day, Edit, Delete, and a pencil icon.
- Wednesday, April 23, 2025 | 10:30 AM - 03:30 PM (Washington, DC, USA (GMT-5))**
  - Agenda items: Introduction (10:30 AM - 11:30 AM) and Session Topic - 002 (11:30 AM - 01:00 PM)
  - Action buttons: Skip Day, Edit, Delete, and a pencil icon.

**View/Upload Reference Documents**

Drag & drop files or [browse](#)

Uploaded Reference Documents (5)

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

Action buttons: Delete, Show 5 Rows, 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:

The screenshot shows the 'Add Travel Details' section of the enora Customer Advisory Board. It consists of three main sections: 'Flight Details', 'Accommodation', and 'Ground Transport Information'. Each section contains a list of fields with their names and types, along with edit and delete icons. A 'Save & Next' button is located at the bottom left, and a 'Back' button is at the bottom center.

**Flight Details**

Field Name	Field Type
Inbound Flight	Alphanumeric
Outbound Flight	Select Field Type
Type Field Name...	Select Field Type

**Accommodation**

Field Name	Field Type
Hotel Name	Alphanumeric
Reservation Number	Numeric
Check-in	Numeric
Check-out	Numeric
Type Field Name...	Select Field Type

**Ground Transport Information**

Arrival to Venue		Departure from Venue	
Field Name	Field Type	Field Name	Field Type
Booking Number	Numeric	Booking Number	Numeric
Date/Time	Date Picker	Date/Time	Date Picker
Pick-up Location	Alphanumeric	Pick-up Location	Alphanumeric
Drop-off Location	Alphanumeric	Drop-off Location	Alphanumeric
Type Field Name...	Select Field Type	Type Field Name...	Select Field Type

**Buttons**

- 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:

encora 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



\*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.

This screenshot shows the 'Add Event' page. At the top, there are navigation links: 'Dashboard', 'Customer Advisory Board', 'Switch to Attendee', 'Dashboard', 'Manage Attendees', 'Manage Events', and a user profile for 'Admin Jessica Gamboa'. Below the header, the page title is 'Add Event'. A sub-section titled 'Add Contact Info' contains a field for 'Organizing Committee Email' with the value 'cab@encora.com' and a pencil icon for editing. A section for 'Select Event Coordinator' shows a search bar with 'Jessica Gamboa' and two results cards. Card 1 for 'Jessica Gamboa' lists her role as 'Manager, Commercial Campaigns' and email as 'Jessica.Gamboa@encora.com'. Card 2 for 'Kirsten Torchalski' lists her role as 'Director, Partnership Marketing' and email as 'Kirsten.Torchalski@encora.com'. Both cards include a LinkedIn icon and a trash icon. At the bottom are 'Save Event' and 'Back' buttons.

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.

This screenshot shows the same 'Add Event' page after changes have been saved. The 'Organizing Committee Email' field now has a green checkmark icon. The 'Select Event Coordinator' section remains the same, displaying the two cards for Jessica Gamboa and Kirsten Torchalski. The 'Save Event' and 'Back' buttons are at the bottom.

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

Add Contact Info

Organizing Committee Email:  
cab@encora.com

Select Event Coordinator:  
Jessica Gamboa

1 Jessica G  
Manager, C  
\_Jessica.Ga  
Contact Nu

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

Attendee List

Organization Filter All Add Attendee Delete Show 05 Entries

First Name	Last Name	Designation	Organization	Action
Kevin	Riley	CTO & SVP, Technology & Innovation	Avid Technology	
Anand	Birje	CEO	Encora	
Matt	Diamond	CIO	McAfee	
Manish	Jaiswal	Chief Product & Technology Officer	Concentric	
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.

Screenshot of the 'Add Attendee' form for CAB Member:

The form includes the following fields:

- \* Select Attendee Type: CAB Member
- \* Organization Name: (text input field)
- \* First Name: (text input field)
- \* Last Name: (text input field)
- \* Designation: (text input field)
- \* Official Email Address: (text input field)
- LinkedIn Profile URL: (text input field)
- \* Upload Organization Logo:
  - File Name: (text input field)
  - Browse: (button)
  - Max File Size: 1 MB, Supported File Formats: jpg, png
  - Organization Logo Preview: (image placeholder)
- \* Upload Profile Photo:
  - File Name: (text input field)
  - Browse: (button)
  - Max File Size: 1 MB, Supported File Formats: jpg, png
  - Profile Photo Preview: (image placeholder)
- Submit: (button)
- Cancel: (button)

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

Screenshot of the 'Add Attendee' form for Encora Leader:

The form includes the following fields:

- \* Select Attendee Type: Encora Leader
- \* Last Name: (text input field)
- \* First Name: (text input field)
- \* Designation: (text input field)
- \* Official Email Address: (text input field)
- LinkedIn Profile URL: (text input field)
- \* Upload Profile Photo:
  - File Name: (text input field)
  - Browse: (button)
  - Max File Size: 1 MB, Supported File Formats: jpg, png
  - Profile Photo Preview: (image placeholder)
- Organization Logo: 
- Submit: (button)
- Cancel: (button)

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:

The screenshot shows the Attendee Profile Details page. At the top, there is a navigation bar with the encora logo, Customer Advisory Board, Switch to Attendee, Dashboard, Manage Attendees, Manage Events, and a user profile for Admin Jessica Gamboa. Below the navigation bar, the URL is shown as Dashboard > Manage Attendees > Attendee Profile Details. The page title is "Attendee Profile Details".

On the left, there is a sidebar with the encora logo and the text "Event List (8)". The main content area displays basic attendee information: Attendee Name: Kevin Riley, Designation: CTO and SVP of Technology & Innovation, Organization Name: Avid, Email ID: kevin.riley@avid.com, and LinkedIn ID: <https://www.linkedin.com/in/lorem ipsum/user-name001>. To the right of this information is a table titled "Event List (8)" showing eight events. The columns are Name, Type, Start Date, End Date, Status, and Queries Asked. The events listed are:

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	?

At the bottom, it says "Showing 5 out of 8 Entries" and "Page 1 of 2 < 1 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:

The screenshot shows the encora Customer Advisory Board (CAB) interface. At the top, there's a navigation bar with the encora logo, 'Customer Advisory Board', and links for 'Switch to Attendee', 'Dashboard', 'Manage Attendees', 'Manage Events', and a user profile for 'Admin Jessica Gamboa'. Below the navigation, a breadcrumb trail shows 'Dashboard > Manage Attendees > Attendee Profile Details'. The main content area is titled 'Attendee Profile Details' and features a large central window for 'Queries Asked (6)'. This window displays event name 'CAB - Lorem Ipsum is simply dummy text Event 001' and four numbered questions with their respective text and timestamps. To the right of this window is a sidebar with a list of 'Queries Asked' and a 'Show [05] Entries' button. At the bottom, there are tabs for 'Live', '09-21-2025', '09-22-2025', and 'Upcoming', along with a page navigation section.

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 similiique sunt in culpa qui officia deserunt mollitia?  
03-10-2025, 11:25 AM

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 similiique sunt in culpa qui officia deserunt mollitia?

CAB - Event 004

CAB - Event 005

Live      09-21-2025      09-22-2025      Upcoming

Show [05] Entries

Queries Asked

Page 1 of 2

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.