

# 平台操作指南（一）



基本设置

# 注册和登录

输入www.eventbank.cn，进入EventBank网站注册登录，开始发布您的活动吧！

已有组织者账  
户登陆入口



# 注册和登录

输入www.eventbank.cn，进入EventBank网站注册登录，开始发布您的活动吧！



# 机构设置

## ◆ 机构简介-填写组织机构的基本信息

EventBank

管理主页 客户关系 活动管理 邮件营销 财务收支 机构设置

ZH

机构概览 编辑机构简介

简介 编辑机构简介并上传最新的机构商标

社交媒体 链接社交媒体账号

团队成员 邀请您的同事加入EventBank建会易管理平台

职责角色和权限 设置其在机构中的角色和权限

档案 查阅公司档案

**机构信息**

名称: EventBank

关于组织者: EventBank is the first smart event management cloud platform. We offer trusted technology solutions to event organizers of all sizes, ranging from start-ups to multinational enterprises.

行业: 计算机软件

机构类型: 其他

**机构公开网页**

定制化URL: <http://www.eventbank.cn/org/> eventbank

**机构联系方式**

网站: <http://www.eventbank.com>

电子邮箱: contactus@eventbank.com

地址: Room 216, Guanghua SOHO, 22 Guanghua Lu Chaoyang District, Beijing 100020

邮编:

+86 010 8539 6215

国家: 中国

州 / 省:

城市: Beijing

公共联系人

姓氏: Fan

名字: 刘



# 机构设置

## ❖ 机构简介-添加媒体社交链接

EventBank

管理主页 客户关系 活动管理 部件营销 财务收支 机构设置

+ 添加社交媒体链接

社交媒体种类	社交媒体链接
Google+	<a href="https://plus.google.com/106277230408836409565/">https://plus.google.com/106277230408836409565/</a>
Facebook	<a href="https://www.facebook.com/eventbank">https://www.facebook.com/eventbank</a>
Twitter	<a href="https://twitter.com/EventBank_EB">https://twitter.com/EventBank_EB</a>
LinkedIn	<a href="https://www.linkedin.com/company/eventbank">https://www.linkedin.com/company/eventbank</a>
Instagram	<a href="http://instagram.com/eventbank">http://instagram.com/eventbank</a>
微博	<a href="http://weibo.com/u/3814784426">http://weibo.com/u/3814784426</a>

# 机构设置

## ◆添加“团队成员”

当点击添加邀请成员后，被邀请的成员会收到一封电子邮件，点击电子邮件中的链接，完成密码等信息的注册，即可成为“团队成员”。

The screenshot shows the 'EventBank' software interface for managing team members. The top navigation bar includes links for Management Home, Client Relations, Activity Management, Lead Generation, Financial Income, Organization Settings (highlighted in green), and a language switch to Chinese (ZH). A search bar on the right has a placeholder text '点此搜索 团队成员' (Search for Team Members) circled in red.

The left sidebar menu lists categories: Organization Overview, Team Members (selected), Roles and Permissions, and Locations. The 'Team Members' section contains a sub-menu for 'All Team Members' and a list of team members with their names, email addresses, and roles:

角色	姓名	邮箱	角色
SA	Smile Ameham	postmaster@amchamchina.org	组织成员
	Kristen Carusos	kristen@eventbank.com	营销人员
	Smile Chen	smile.chen@eventbank.com	管理员
	Wang Chlee	chlee.wang@eventbank.com	管理员
	Lido G	lido.ghali@eventbank.com	管理员
	Luna Kong	luna@eventbank.com	管理员
XL	Xiehang Li	xiehang.li@eventbank.com	管理员
AM	Amy Ma	949964420@qq.com	营销人员
AM	Amy Ma	www.wwww.wwww.wwww.wwww	营销人员

# 机构设置

## ❖ 职责角色和权限

自定义设置不同团队成员的角色和权限，即成员看到的内容也不同。

The screenshot shows the 'EventBank' application interface. On the left, there's a sidebar with navigation items: '机构概览', '团队成员', '职责角色和权限' (highlighted in blue), and '档案'. The main content area has a header with tabs: '管理主页', '客户关系', '活动管理', '邮件营销', '财务收支', and '机构设置' (highlighted in green). Below the header, there's a sub-menu for '职责角色': '管理员', '项目经理', '营销人员', '财务', '组织成员', 'New Role', and '添加职责角色'. A red circle highlights the '选定角色' (Select Role) button next to the '项目经理' item. The main panel contains a section titled '项目经理可以工作需要分配任务, 联系人以及会员给团队成员 职责 项目经 无法被移除' with a note '在这里可以设置组织中的用户可以访问并编辑哪些功能 改变之后系统会自动应用这些设置'. Below this is a table for managing permissions:

	查看	更新	创建	删除
机构设置	●			
团队成员	●			
权限管理	●	○	○	
团队成员	●	●	●	
机构概览	○	○		
关闭/打开会员管理功能	○	○		
▶ 客户关系	●	●	●	
▶ 邮件营销	●	○	○	
▶ 活动管理	○	○	○	
▶ 财务收支	○	○		

A red circle with an arrow points to the '更新' (Update) column of the first row, with the text '点击修改权限' (Click to modify permissions).

# 平台操作指南 (二)



客户关系管理

# 客户关系管理

## ◆客户关系主页

The screenshot shows the EventBank CRM homepage. The top navigation bar includes links for Management Home, Customer Relations (highlighted in green), Activity Management, Email Marketing, Financial Income and Expenditure, and Institution Settings. The status bar indicates the language is Chinese (ZH) and shows a warning icon.

**左侧菜单栏:**

- 控制面板 (查看所有联系人和潜在客户)
- 个人 (管理联系人、导入、导出和创建群组列表)
- 公司 (管理公司联系人信息、导入、导出、创建联系人列表)
- 自定义设置 (定制您的客户管理系统)
- 导入记录 (查看导入记录、错误报告和状态)
- 未激活联系人 (查看管理未激活联系人)

**中心统计区域:**

类别	数量	子类别
个人	1,708	1,692 联系人 16 潜在客户
公司	558	547 联系人 11 潜在客户

**搜索功能:** 输入姓名或公司名称查找联系人

**我的联系人:** 张川 (嫣然天使基金运营总监)

**近期添加的联系人:**

张川 嫣然天使基金运营总监	编辑
李全建	编辑

**近期开发的潜在客户:**

修东华 迪美公司	编辑
刘研 InfoQ	编辑

# 客户关系管理

## ◆客户关系主页

The screenshot displays the EventBank CRM application interface. The top navigation bar includes links for Management Home, Customer Relations (highlighted in green), Activity Management, Email Marketing, Financial Income/Expenditure, and Institution Settings. A control panel on the left lists various management functions such as Control Panel, Personal, Company, Custom Settings, Import History, and Unactivated Contacts. The main content area shows a contact profile for '尹亮' (Yin Liang) from Beijing Mother Service Association, with email yl@bjabn.com and phone +86 13810010009. Below the profile is a timeline of historical activities:

- 2015年12月21日: 线下会见: Had another training on membership on 17th Dec.
- 2015年12月10日:
  - 任务: Membership-Training (marked as completed)
  - 线下会见: Training with whole team by Bella
- 2015年11月24日: 尹亮出席了协会信息化与市场化发展高端论坛。
- 2015年11月23日:
  - 尹亮提交了参加协会信息化与市场化发展高端论坛活动的注册申请。
  - Figure Sun批准了您参与协会信息化与市场化发展高端论坛活动的申请。

# 客户关系管理

## ◆客户关系主页

The screenshot shows the EventBank CRM software interface. At the top, there is a navigation bar with tabs: 管理主页, 客户关系 (highlighted in green), 部件营销, 财务收支, and 机构设置. Below the navigation bar, there are several buttons: +添加备注, +添加任务, 编辑, 添加为潜在客户, and 删除. A red oval highlights the "+添加任务" button. The main area displays a contact record for "尹亮" (Yin Liang) from "北京母婴服务协会(主管)". The contact's email is "yl@bjabn.com" and their phone number is "+86 13810010069". On the left sidebar, there are menu items: 控制面板, 个人, 公司, 白定义设置, 导入记录, and 未激活联系人. The "任务" tab is selected. A modal window titled "添加任务" (Add Task) is open, showing fields for Name (团体培训), Task Type (线下会见), Assignee (Bella Wu), Due Date (2016-01-09), Due Time (晚上 6:00), and Description (Bella需要在1月9日下班之前完成对母婴协会的线下培训). At the bottom of the modal are "添加" (Add) and "取消" (Cancel) buttons. Below the modal, there is a message: "尹亮出席了协会信息化与市场化发展高端论坛." and a date: "2015年11月23日". Another message states: "尹亮提交了参加协会信息化与市场化发展高端论坛活动的注册申请." At the very bottom, there are links for App Store, Google play, customer service (support@eventbank.com), and copyright information: "Copyright © 2016 EventBank".

# 客户关系管理

## ◆添加联系人

The screenshot shows the EventBank CRM software interface. On the left is a sidebar with navigation links: Control Panel, Personal, Company, Custom Settings, Import History, and Unactivated Contacts. The main area has tabs for Management, Marketing, Financial, and Organization Settings. A red oval highlights the 'Management' tab. Below it are buttons for '+添加联系人' (Add Contact), '导入联系人' (Import Contact), and '导出联系人' (Export Contact). The '联系人' (Contact) tab is selected. A large red oval highlights the '点击添加' (Click to Add) button at the top center. The contact form fields include: 联络方式 (Contact Method) with '电子邮箱' (Email) and '(+86) 电话' (Phone); 姓氏\* (Last Name) and 名字\* (First Name); a dropdown for '为联系人指派一位团队成员' (Assign a team member to this contact) containing 'Bella Wu'; 职业背景 (Background) with '公司' (Company) and '职位' (Position); 行业 (Industry); 地址 (Address) with '地址' (Address), '国家' (Country), '州 / 省' (State / Province), '邮编' (Zip Code), and '城市' (City); and 组织自定栏目 (Custom Column). A red callout bubble points to the '指派人员' (Assignee) field.

# 客户关系管理

## ◆ 导入联系人

The screenshot shows the EventBank CRM interface. At the top, there is a navigation bar with links like '管理主页', '客户关系' (highlighted in green), '活动', '销售', '财务收支', and '机构设置'. Below the navigation bar, there are buttons for '+添加联系人', '导入联系人' (with a red callout bubble pointing to it), and '导出联系人'. On the left, there is a sidebar with various management options. A file selection dialog box is open in the center, showing a list of files. One file named '联系人' is selected and highlighted with a blue border. The file list includes:

名称	修改日期	类型
On Boarding Process	2015/12/18 11:32	PDF 文件
Onboarding%20Package	2015/12/21 11:58	PDF 文件
百度	2015/12/10 9:33	快捷方式
百度云管家	2015/12/31 11:14	快捷方式
报告-20150929	2015/12/8 10:59	Microso
联系人	2016/1/4 13:48	Microso

Below the file list, there is a '打开(O)' (Open) button. To the right of the file selection dialog, there is a contact import form with fields for '电话' (Phone), '名字' (Name), '职位' (Position), '行业' (Industry), '地址' (Address), '国家' (Country), '州 / 邮政区' (State / Zip), and '城市' (City). A red warning icon is visible near the phone number field.

# 客户关系管理

◆导入联系人-Excel表格模板 (姓和名分开， 去掉超链接)

	A	B	C	D	E	F	G	H	I	J
1	姓	名	电话	邮箱	公司	职位	地址			
2	吴	丽伟	18201536537	bella.wu@eventbank.com	捷会易	客户成功	北三环东路			
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
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24										
25										
26										
27										
28										
29										

# 客户关系管理

## ◆ 导入联系人

EventBank

管理主页 客户关系 活动管理 邮件营销 财务收支 机构设置 ZH

+ 添加联系人 导入联系人 导出联系人

请在以下视图内定义您表格内的区块。您需要完成必要的区块的定义后才能使用此功能。

选择系统与之对应的表头

必填信息:

姓 姓氏  
范例: 吴

名 名字  
范例: 丽伟

电话 电话号码  
范例: 18201530537

邮箱 电子邮箱  
范例: bella.wu@eventbank.com

公司 公司  
范例: 捷会易

职位 职位  
范例: 客户成功

地址 地址  
范例: 北三环东路

当您导入文档时，系统是以邮箱地址作为识别的。如果系统发现该联系人邮箱已存在，请做出如下选择：

- 忽略此联系人信息。系统将不会导入此联系人，稍后您可在导入报告中审阅全部此类联系人，并决定是否人工导入。
- 改写联系人信息。系统会替换该联系人的所有信息。

点击提交导入

提交 取消

# 客户关系管理

## ◆添加公司

The screenshot shows the EventBank CRM software interface. The top navigation bar includes links for Management Home, Customer Relations (highlighted with a green arrow), Activity Management, Email Marketing, Financial Income, and Institution Settings. The language is set to Chinese (ZH). On the left sidebar, there are links for Control Panel, Personal, Company, Custom Settings, Import History, and Unactivated Contacts. The main content area is titled 'Add Company'. It contains fields for Company Information (Company Name, Industry, Phone, Email), Company Website (Website URL), and Company Address (Address, Country, State/Province, City). At the bottom right are 'Add' and 'Cancel' buttons. Below the form, there are tabs for 'All Companies (558)' and 'New Company List', along with a search bar for names or company names. A footer navigation bar includes links for Name, Industry, Email, and Phone Number.

填写信息，  
点击添加完成

EventBank

管理主页 客户关系 活动管理 邮件营销 财务收支 机构设置 ZH

+ 添加公司

公司信息

公司名称： 行业

(+86) 电话 电子邮箱

公司网址

网站

公司地址

地址 国家

邮编 州 / 省

城市

添加 取消

所有公司 (558)

新公司列表 +

通过姓名或公司名称查找联系人

姓名 行业 电子邮箱 电话号码

# 平台操作指南（三）



活动创建与发布

# 活动创建与发布

## ❖ 活动设置

工具栏 > ★ EventBank答谢酒会 ▾ ZH ⚡

**活动设置**  
在进行下一步骤前请完成所有设置. [进入活动设置.](#)

活动标题	EventBank答谢酒会
开始日期	2016年01月01日 星期五 上午 6:00
结束日期	2016年01月01日 星期五 上午 10:00
活动摘要	无
副标题	无
活动类型	无
组织角色	主办方
行业	无
内部联系人	Bella Wu

**我的任务**  
目前没有任务指派给您  
所以快去任务计划里创建吧!

**活动截止时间**

- 今天
- 更新了活动设置 Bella Wu
- "EventBank答谢酒会" 创建了 Bella Wu 活动 1 活动管理 创建了 Bella Wu 活动

# 活动创建与发布

## ❖ 活动设置

The screenshot shows the 'Event Settings' page for an event titled 'EventBank答谢酒会'. The left sidebar has sections like 'Activity Control Panel', 'Activity Planner', and 'Activity Settings' (selected). The main area shows activity details, social media sharing options, participant limits, and contact information.

- 保存** (Save) button.
- 活动时间** (Activity Time):
  - 开始日期: 2016-01-01
  - 结束日期: 2016-01-01
  - 开始时间: 06:00
  - 结束时间: 10:00
- 社交媒体** (Social Media): Allows participants to share the event on various platforms.
  - LinkedIn
  - 微信
  - 微博A callout bubble says: **可以选择社交媒体渠道来分享您的活动** (You can choose social media channels to share your event).
- 选择社交媒体** (Select Social Media): A dropdown menu with options: Facebook, Google+, Twitter. A callout bubble says: **可以设置参会者上限** (You can set a participant limit).
- 设置参会者上限 (选填项)** (Optional Participant Limit): A text input field.
- 参会者购票须填写个人详细信息。 (在此定制您的注册表)** (Participants must fill in personal information. (Customize your registration form here))
- 需审批参会申请** (Requires approval for participation application) checkbox: A callout bubble says: **如果只有特定人员可以参会, 可以勾选此选项** (If only specific personnel can participate, you can check this option).
- 联系人信息** (Contact Information):
  - 选择内部联系人: Bella Wu

# 活动创建与发布

## ❖活动摘要

The screenshot shows the 'EventBank' software interface for creating and publishing events. The left sidebar contains a navigation menu with the following items:

- 活动控制面板 (Activity Control Panel)
- 活动策划者 (Activity Planner)
- 活动设置 (Activity Settings) - This item is expanded, showing:
  - 活动设置 (Activity Settings): Manage event name, date, internal contacts, etc.
  - 活动团队 (Activity Team): Invite team members to help plan the activity.
  - 活动内容 (Activity Content): Set location, participants, events, and schedule.
  - 摘要 (Summary):** View and edit event summary.
  - 演讲嘉宾 (Speakers): Manage speaker information.
  - 日程安排 (Schedule): Create tasks and categorize them.
  - 场地和联系人 (Venue and Contacts): Manage venue locations and related contacts.
  - 赞助商和合作伙伴 (Sponsors and Partners): Show host institution information.
  - 文档 (Documents): Provide download links for related documents.

The main workspace is titled 'EventBank首谢酒会'. It features a toolbar with a star icon, a save button, and language settings (ZH). The '活动内容' tab is selected. The '活动摘要' (Event Summary) section contains a rich text editor with bold, italic, and other styling options. A placeholder text reads: '请在此输入您的活动摘要。为了达到最佳搜索效果，我们建议您将摘要内容控制在400字以内。您可在活动发布栏中添加更多内容。' (Please enter your event summary. To achieve the best search results, we recommend controlling the summary content to within 400 characters. You can add more content in the publication bar.)

# 活动创建与发布

## ❖ 演讲嘉宾

The screenshot shows the EventBank software interface for creating and publishing events. On the left, there is a vertical toolbar with various options like 'Event Control Panel', 'Event Planner', and 'Event Content'. The main area is titled 'EventBank 谢谢酒会' and shows a form for adding a speaker. The form includes fields for 'Last Name', 'First Name', 'Position', and 'Company'. There is also a text area for 'Introduction' and a dropdown for 'Order' with the option 'Always at 1'. A large placeholder image for a photo is present. Two red callout bubbles provide instructions: one pointing to the photo placeholder with the text '点击小铅笔可以上传照片' (Click the pencil icon to upload a photo), and another pointing to the 'Order' dropdown with the text '可以给演讲嘉宾排序' (You can sort the speakers).

工具栏 > ★ EventBank 谢谢酒会 ZH 活动内容 多语言设置

+ 添加演讲嘉宾

活动控制面板 快速了解机构信息

活动策划者 协同任务与团队协作

活动设置

活动设置 编辑活动名称、日期、内部联系人等

活动团队 邀请您组织内的成员协助策划活动

活动内容 参会者、事件、地点，设置您的活动地点、演讲嘉宾和日程安排等

摘要 查看和修改活动摘要

演讲嘉宾 管理演讲嘉宾

日程安排 创建任务内容并将其分类

场地和联系人 配置活动举办地点和活动相关联系人

赞助商和合作伙伴 向参会者展示活动主办机构的信息

文档 在活动网站上提供可下载的相关文档

演讲嘉宾信息

姓氏 \*

名字

职位

公司

在此介绍您的活动演讲嘉宾

顺序  
总是排在1

添加 取消

点击小铅笔可以上传照片

可以给演讲嘉宾排序

# 活动创建与发布

## ◆添加日程

The screenshot displays the EventBank software interface for creating and publishing events. On the left, a sidebar lists various management sections: 活动控制面板 (Activity Control Panel), 活动策划者 (Activity Planner), 活动设置 (Activity Settings), 活动内容 (Activity Content), 摘要 (Summary), 演讲嘉宾 (Speakers), 日程安排 (Schedule), 场地和联系人 (Venue and Contacts), 赞助商和合作伙伴 (Sponsors and Partners), 文档 (Documents), and 活动发布 (Event Publishing). The main area shows a schedule for "第1天 (2015年11月24日)". A red oval highlights the "会议" (Meeting) option in the "选择一个议程类型以开始建立您的时间表" (Select a session type to start building your timeline) dropdown menu. Another red oval highlights the "下午 1:30 - 下午 2:00" time slot, which is labeled "可编辑或删除" (Editable or deletable). A third red oval highlights the text "活动在分为不同会场时点此设置" (When the event is divided into different venues, set it here), pointing to the "会议" option in the dropdown menu. The schedule details include:

- 开始时间: 下午 1:30 - 可编辑或删除
- 下午 1:30 - 下午 2:00: 注册和签到
- 下午 2:00 - 下午 2:15: 活动简介
- 下午 2:15 - 下午 2:45: 摘要演讲“与时俱进的中国协会的新角色”  
协会由政府化向市场化过渡是如何影响协会组织的运作方式...
- 下午 2:45 - 下午 3:45: 台上圆桌讨论：中国协会组织的现代化进程  
在现代社会，人们的工作方式和协会的组织结构发生了根本...
- 下午 3:45 - 下午 4:15: 暂定... 在线技术对协会组织和行业的影响

# 活动创建与发布

## ◆ 场地和联系人

活动控制面板 快速了解机构信息

活动策划者 指派任务与团队协作

活动设置 编辑活动名称、日期、内部联系人等

活动团队 邀请您组织内的成员协助策划活动

活动内容 参会者、事件、地点，设置您的活动地点、演讲嘉宾和日程安排等

摘要 查看和修改活动摘要

演讲嘉宾 管理演讲嘉宾

日程安排 创建任务内容并将其分类

场地和联系人 编辑活动举办地点和活动相关联系人

赞助商和合作伙伴 向参会者展示活动主办机构的信息

文档 在活动网站上提供可下载的相关文档

保存 活动内容 多语言设置

活动场地

场地名称: 机宾斯基饭店 Jade Ballroom C厅

地址: 亮马桥路 50号

会场所在城市: 北京

州 / 省:

国家: 中国

添加路线描述

附加活动地址信息: 地铁10号线 亮马桥站C出口 往东即到

点击上传文件: 点击这里上传文件

首次在协会易平台使用此地址，保存以便以后使用。

联系人信息

联系方式: 杨扬

系统可以自动地图定位

# 活动创建与发布

## ❖ 赞助商和合作伙伴

The screenshot shows the 'EventBank' software interface for managing event details. On the left, a sidebar lists various sections: 工具栏 (Tools Bar), 活动控制面板 (Activity Control Panel), 活动策划者 (Activity Planner), 活动设置 (Activity Settings), 活动设置 (Activity Settings), 活动团队 (Activity Team), 活动内容 (Activity Content), 摘要 (Summary), 演讲嘉宾 (Speakers), 日程安排 (Schedule), 场地和联系人 (Venue and Contact), 赞助商和合作伙伴 (Sponsors and Partners), and 文档 (Documents). The 'Sponsors and Partners' section is currently selected.

The main content area displays the 'Sponsors and Partners' page. It includes:

- 组织者 (Organizer):** EventBank
- 场地赞助和媒体支持 (Venue Sponsorship and Media Support):** 北京荷莎中心有限公司, 宾斯基, 中国日报
- 支持单位 (Supporting Units):** 中国美国商会, 中国互联网协会, 中国国际贸易促进委员会, 中国商务广告协会, 国际旅游精英协会, 中国国际交流促进会, 中国机电产品流通协会, 中国中小企业国际合作协会, 国际慢食协会, 中国环境保护产业协会, 北京糖尿病防治协会

Two red callout bubbles highlight specific features:

- A bubble above the organizer section points to the '+ 添加新建群组' (Add New Group) button with the text '添加合作伙伴类别' (Add Partner Category).
- A bubble above the supporting units section points to the '+ 组织' (Organization) button with the text '添加组织' (Add Organization).

# 活动创建与发布

## ❖ 上传会议资料

The screenshot shows the EventBank software interface. On the left is a vertical sidebar with a blue header containing icons for '工具栏' (Tools), '活动控制面板' (Activity Control Panel), '活动策划者' (Activity Planner), '活动设置' (Activity Settings), '活动设置' (Activity Details), '活动团队' (Activity Team), '活动内容' (Activity Content), '摘要' (Summary), '演讲嘉宾' (Speakers), '日程安排' (Schedule), '场地和联系人' (Venue and Contacts), '赞助商和合作伙伴' (Sponsors and Partners), and '文档' (Documents). The main area has a light gray header with a red oval highlighting the text '上传附件供参会者在线浏览或下载' (Upload attachments for visitors to browse online or download) next to a green button labeled '上传共享文件' (Upload Shared File). Below this is a table with columns '文件名' (File Name), '作者' (Author), and '上次修改' (Last Modified). A message at the bottom states '本次活动没有可共享的文件。' (This activity does not have any sharable files.)

# 活动创建与发布

## ❖ 活动发布——注册设置

The screenshot shows the 'Registration Settings' section of the EventBank platform. On the left sidebar, 'Registration Settings' is selected under 'Activity Release'. The main area displays a form for customizing registration flows. A red circle highlights the '必填项' (Required) checkbox for the 'Email' field. Another red circle highlights the '显示项' (Visible Item) label above the '选择默认填写项' (Select Default Filling Item) dropdown, which lists fields like '电话' (Phone), '公司' (Company), '职位' (Position), etc. A third red circle highlights the '隐藏项' (Hidden Item) label above the '自定义新的填写项' (Customize New Filling Item) section, which includes fields like '国家' (Country), '州 / 首都' (State/Capital), '邮编' (Zip Code), and '城市' (City). A fourth red circle highlights the '自定义项' (Custom Item) label next to the '内容' (Content) field.

自定义注册流程，设置问题了解参会者的喜好。选出您感兴趣的版块并排序。

如勾选则为注册必填项

这是必填项

显示项

隐藏项

自定义项

保存

# 活动创建与发布

## ❖ 活动发布——付款设置

The screenshot shows the 'Payment Settings' section of the EventBank platform. On the left, a sidebar lists various configuration options. The main area displays payment methods and their configuration.

**人民币支付渠道:** 支持所有主流线上付款渠道 (Supported by all mainstream online payment channels)

**美元及港币支付渠道:** 提示: 如果您的活动为免费活动, 您则不需要创建门票。访客将根据系统默认设置完成注册。

**付款方式和规则:**

- 允许在线付款
- 允许银行转账付款

也可以选择银行转账

**组织者退款政策:** 如果此活动包含付费门票, 您可以在这里输入退款政策。

**交易手续费设置 (信用卡和网关服务费)**

选择交易手续费支付方式: 费用包含在票价中

**发票信息 (只对人民币有效):**

- 允许参会者申请发票

收集发票需求

# 活动创建与发布

- ❖ 活动发布——票务设置(如果活动免费则不需要设置票务)

The screenshot shows the 'Ticketing' setup page within the EventBank platform. The left sidebar contains navigation links such as 'Ticket Control Panel', 'Event Planning', 'Event Settings', 'Event Release', 'Registration Settings', 'Ticket Types', 'Payment Settings', 'Services', 'Discount Coupons', 'Event URLs', 'Participants Management', and 'Event Financials'. The main area is titled 'Create Ticket' and includes fields for 'Ticket Name' (highlighted with a red border), 'Remaining Quantity', 'Ticket Description', and a checkbox for 'Display this ticket on the event public page'. Below this is a section for 'Initial Price' with a note: 'You can add other price options after creating the ticket.' It features dropdowns for 'Currency' (set to 'Renminbi') and 'Price', and a dropdown for 'Payment Method' (set to 'Purchase before the event'). At the bottom right are 'Add' and 'Cancel' buttons.

# 活动创建与发布

- ❖ 活动发布——票务设置(如果活动免费则不需要设置票务)

The screenshot shows the 'Ticketing' setup page within the EventBank platform. The left sidebar contains navigation links such as 'Activity Control Panel', 'Activity Planning', 'Activity Settings', 'Activity Release', 'Registration Settings', 'Ticket Category', 'Payment Settings', 'Services', 'Discount Coupons', 'Activity URL', 'Participant Management', and 'Activity Financials'. The main area is titled 'New Ticket' and includes fields for 'Ticket Name' (highlighted with a red border), 'Remaining Quantity', 'Ticket Description', and a checkbox for 'Display this ticket on the activity public page'. Below this is a section for 'Initial Price' with dropdown menus for 'Currency' (set to 'Renminbi') and 'Price', and a dropdown for 'Payment Method' (set to 'Purchase before the event'). At the bottom right are 'Add' and 'Cancel' buttons.

# 活动创建与发布

## ❖ 活动发布——)

The screenshot shows the EventBank platform's activity management interface. On the left, a sidebar lists various activity-related modules: 活动控制面板 (Activity Control Panel), 活动策划者 (Activity Planner), 活动设置 (Activity Settings), 活动发布 (Activity Release), 注册设置 (Registration Settings), 注册列表 (Registration List), 付款设置 (Payment Settings), 票务 (Ticketing), 优惠券 (Coupon), 活动网址 (Activity URL), 参会者管理 (Participant Management), and 活动财务收支 (Activity Financial Income and Expenditure). The "优惠券" (Coupon) module is currently selected and highlighted in blue.

The main content area displays a table titled "优惠券列表" (Coupon List) with columns: 优惠券名称 (Coupon Name), 截止日期 (Expiration Date), 号码 (Number), and 折扣 (Discount). A message at the top of the table says "没有发现任何记录" (No records found).

A modal window titled "添加优惠券" (Add Coupon) is open in the center. It contains fields for "优惠券名称" (Coupon Name) with placeholder "优惠券名称", "截止日期" (Expiration Date) set to "2015-11-24", "号码" (Number) with placeholder "YHK0ZSQW", and "折扣百分比" (Discount Percentage) set to "50%". A green "保存" (Save) button is located at the bottom right of the modal.

A red oval highlights the "添加优惠券" (Add Coupon) button in the top right corner of the main interface, with the text "可以添加优惠券" (Can add coupons) overlaid.

# 活动创建与发布

## ◆ 活动发布——模板选择

工具栏 > Highlight 协会信息化与市场化发展高端论坛 ▾ ZH ⚠️

### 活动模板

选择一个默认模板会让您在之后新建活动的时候跳过这一步

<b>Espresso</b> <span>设置为默认</span>	<b>Caramel Macchiato</b> <span>设置为默认</span>	<b>Iced Latte</b> <span>设置为默认</span>
		
<a href="#">预览</a> <a href="#">选择</a>	<a href="#">预览</a> <a href="#">使用中</a>	<a href="#">预览</a> <a href="#">选择</a>
这种直达主题式的模板适用于所有活动，是EventBank捷会易的推荐首选。		
<b>Noisette</b> <span>设置为默认</span>	<b>Americano</b> <span>默认</span>	
		
<a href="#">预览</a> <a href="#">选择</a>	<a href="#">预览</a> <a href="#">使用中</a>	
用现代化的模板展现您的活动，这种简洁且功能化的设计正如您的企业一样始终处在行业前沿。		

可预览模板效果

# 活动创建与发布

## ◆ 活动发布——定制化设计

The screenshot displays the EventBank software interface. On the left, a vertical toolbar lists various features: 活动控制面板 (Activity Control Panel), 活动策划者 (Activity Planner), 活动设置 (Activity Settings), 活动发布 (Activity Release), 注册设置 (Registration Settings), 活动网址 (Activity Website), 选取模板 (Select Template), 走制化设计 (Customization Design), 活动页面 (Activity Page), 参会者管理 (Participant Management), and 活动财务收支 (Activity Financial Income and Expenditure). The main workspace shows a preview of an event website titled "Networking Event". A red oval highlights the "主题色" (Theme Color) button, with the text "可以自定义主题色" (Can be customized to define theme color). Another red oval highlights the "背景图" (Background Image) button, with the text "可以更改背景图" (Can change background image). Below the preview, it says "最大10MB, 最小宽度600像素" (Maximum 10MB, Minimum width 600 pixels). To the right of the preview, three devices (laptop, tablet, and smartphone) show the "Networking Event" website displayed on their screens.

# 活动创建与发布

## ◆ 活动发布——页面编辑

工具栏 > Highlight 协会信息化与市场化发展高端论坛 ▾ ZH ⚠ ⓘ

活动控制面板 快速了解机构信息

活动策划师 指派任务与团队协作

① 活动设置

② 活动发布

③ 注册设置 定制化的注册体验

④ 活动网址 设置活动网址并发布活动

选取模板 为您的活动网站选取模板

定制化设计 根据您喜欢的颜色和品牌规范，调整已选模板

活动页面 添加、展示、隐藏和编辑网站页面

⑤ 参会者管理

⑥ 活动财务收支

预览 取消发布

点击下列选项可添加至内容

IT 指头

单栏

双栏

活动摘要

演讲嘉宾 (W)

合作伙伴 (W)

革，实现这一目标所面临的困难接踵而至。庆幸的是，现代化信息技术工具的出现可以有效地帮助协会组织克服种种困难。在此次高端论坛上，我们将邀请行业内专家通过将理论与实践经验相结合与大家一起探讨这一话题，分享如何应用“互联网+”和从线上到线下推广为组织创造价值增加收益，即包括如何提升会员互动参与度、提升续约率以及加强组织相关运营管理等。

以下是演讲嘉宾快照页面预览

SPEAKERS

The meeting, the teacher is from all over the world industry renowned experts, professors, and experienced practitioners, have a good teaching quality, and the authority of the social status , professors, and experienced practitioners, have a good teaching quality.

Eddy Chen John Smith Eddy Chen John Smith

Eddy Chen John Smith

添加单栏效果

上传图片 嵌入文字

添加双栏效果

上传图片 上传图片

# 活动创建与发布

## ❖ 活动页面生成

PC端活动页面



活动详情

EventBank 携手最具实力的协会领导与行业化发展精英论坛，致力于打造最专业的行业与公众沟通技术平台，为两会和企业本身提供强大支持。此次论坛将通过行业与公关联的专题，是每一个行业的智慧结晶，涵盖中国行业发展的未来，同时对一些行业发展的趋势进行分析。本次活动，将由行业顶尖人才共同探讨，以期能帮助行业与公关联的专题行业带来价值，提升整个行业的智慧结晶，涵盖中国行业发展的未来，同时对一些行业发展的趋势进行分析。本次活动，将由行业顶尖人才共同探讨，以期能帮助行业与公关联的专题行业带来价值，提升整个行业的智慧结晶，涵盖中国行业发展的未来，同时对一些行业发展的趋势进行分析。本次活动，将由行业顶尖人才共同探讨，以期能帮助行业与公关联的专题行业带来价值，提升整个行业的智慧结晶，涵盖中国行业发展的未来，同时对一些行业发展的趋势进行分析。



手机端活动页面



# 活动创建与发布

## ❖ 活动分享

The screenshot shows a mobile web page for the "2016 MBA深圳咨询会" (2016 MBA Shenzhen Consulting Conference). At the top, there is a navigation bar with links for "活动日程" (Event Schedule), "演讲嘉宾" (Speakers), and "关于北大国家发展研究院BiMBA" (About Peking University National Development Research Institute BiMBA). On the right side of the header is a red button labeled "我要报名" (I Want to Register).

In the center of the page, there is a large red button with the text "分享到微信！" (Share to WeChat!). Above this button, a callout bubble contains the text: "点击左上角微信图标，将活动分享到微信" (Click the WeChat icon in the top-left corner to share the activity to WeChat). To the right of the red button is the BiMBA logo.

Below the red button is a QR code with a blue arrow pointing to it, and the text "通过扫描上面的二维码来分享此活动到微信" (Scan the QR code above to share this activity to WeChat).

At the bottom of the page, there is a green banner with the text "北大国家发展研究院MBA申请圆桌分享会" (Peking University National Development Research Institute MBA Application Round Table Share会) and a brown banner with the text "2016 MBA深圳咨询会" (2016 MBA Shenzhen Consulting Conference).

# 平台操作指南（四）



营销推广

# 营销推广

## ❖邮件营销-针对某个活动的营销邮件

The screenshot shows the EventBank platform interface. On the left, there is a sidebar with various activity management options. The main area displays a 'Highlight' section for an event titled 'EventBank Tech Talk - Reactive Microservices'. Below this, a button labeled '+添加营销邮件' (Add Marketing Email) is highlighted with a blue arrow. A modal window titled '添加营销邮件' (Add Marketing Email) is open, showing two types of marketing emails:

- 邀请类营销邮件** (Invitation Marketing Email): This type is associated with a checkmark icon and is described as being bound to a specific event and containing participation options.
- 一般活动营销邮件** (General Activity Marketing Email): This type is associated with a calendar icon and is described as being bound to a general activity.

Both sections have red callout bubbles pointing to them. The first bubble says '带有是否参加活动的选择键' (Contains a participation selection switch). The second bubble says '不带选择键, 直接报名' (No selection switch, direct registration).

# 营销推广

## ❖邮件营销-针对某个活动的营销邮件

The screenshot shows the EventBank Marketing Platform interface. On the left, a sidebar menu lists categories: 活动控制面板, 活动策划者, 活动设置, 活动发布, 活动推广 (selected), 活动邮件营销, 邀请人列表, 参会者管理, and 活动财务收支. The main area is titled "EventBank Tech Talk - Reactive Microservices". It shows two steps: 01 设置 (selected) and 02 布局和内容设置. The "Marketing Email Settings" section includes fields for Subject (EventBank Tech Talk - Reactive Microservices), Sender (EventBank Marketing Team (marketing@eventbank.com)), and Recipient (bella.wu@eventbank.com). A red box highlights the "Recipient" field with the label "回复邮件至". Below this, a note says "需要添加更多的认证发件地址, 请在邮件信息设置中操作". The "Contact List" section shows a search bar with "可搜索个人联系人" and a "Search Contact" button. A contact entry for "Association (277 联系人)" is listed, with a "Select Receiver" button below it. At the bottom, there are download links for iPhone App Store and Google play, and a support email address: support@eventbank.com. The footer includes copyright information: Copyright © 2018 EventBank, 隐私政策, and 使用条款.

# 营销推广

## ❖邮件营销-针对某个活动的营销邮件-带有选择键

The screenshot shows the EventBank software interface for creating marketing emails. On the left, a sidebar lists navigation items: 活动控制面板, 活动策划者, 活动设置, 活动发布, 活动推广 (selected), 活动邮件营销, 邀请人列表, 参会者管理, and 活动财务收支. The main area is a rich-text editor titled '保存' (Save) with a toolbar above it. A sidebar on the left of the editor says '拖拽以下的选项到右侧来开始创建您的营销邮件' (Drag the following options to the right to start creating your marketing email). It lists several options: 称呼 (Greeting), 活动摘要 (Event Summary), 邀请 (Invitation), 演讲嘉宾 (Speaker), 合作伙伴 (Partner), 文章 (Article), 抬头 (Header), 单栏 (Single Column), 双栏 (Two Column), 三栏 (Three Column), and 分隔符 (Separator). The main content area contains the following text:

EventBank诚挚邀请您参加以下活动：

Reactive microservices is the new buzzword in tech industry. This session is devoted to microservices architecture and how they can communicate with each other using different communication protocols.

References:

<https://www.typesafe.com/activator/template/reactive-microservices>  
<http://www.mammatustech.com/reactive-microservices>  
<http://martinfowler.com/articles/microservices.html>

A section titled 'Speakers' displays a photo of Nasir Rafiq and his bio: 'Nasir Rafiq, Senior Platform Developer at EventBak'. At the bottom, there are three buttons: '我将参会' (I will attend) in green, '我可能参会' (I may attend) in grey, and '我不将参会' (I will not attend) in grey.

# 营销推广

## ❖邮件营销-针对某个活动的营销邮件-不带选择键

The screenshot shows the EventBank software interface. The left sidebar has a blue header "工具栏" (Tools) and a list of menu items: ① 活动控制面板 (Activity Control Panel), ② 活动策划者 (Activity Planner), ③ 活动设置 (Activity Settings), ④ 活动发布 (Activity Release), ⑤ 活动推广 (Activity Promotion), ⑥ 活动邮件营销 (Activity Email Marketing), ⑦ 邀请人列表 (Guest List), ⑧ 参会者管理 (Participant Management), and ⑨ 活动财务收支 (Activity Financial Management). The "活动推广" item is currently selected.

The main workspace is titled "活动管理" (Activity Management) and contains a "保存" (Save) button. A toolbar with various icons is visible above the content area. The content area includes a section titled "EventBank诚挚邀请您参加以下活动：" (EventBank sincerely invites you to participate in the following activities) with a "称呼" (Name) field and a "活动摘要" (Activity Summary) field. Below this is a detailed description of an event: "Reactive microservices is the new buzzword in tech industry. This session is devoted to microservices architecture and how they can communicate with each other using different communication protocols." It also lists "References:" with links to external websites: <https://www.typesafe.com/activator/template/reactive-microservices>, <http://www.mammatustech.com/reactive-microservices>, and <http://martinfowler.com/articles/microservices.html>.

Below the description is a "Speakers" section featuring a circular profile picture of Nasir Rafiq and his title "Senior Platform Developer at EventBank". At the bottom of the page is a red "注册" (Register) button.

# 营销推广

## ❖邮件营销-不针对某个活动的一般营销邮件

The screenshot shows the EventBank software interface for managing marketing emails. The left sidebar has a blue header "EventBank" and a list of options: Control Panel (selected), Marketing (selected), Drafts (selected), Predefined (selected), Sent (selected), Templates (selected), Subscriptions (selected), and Senders (selected). The main menu at the top includes Management Home, Customer Relations, Activity Management, Marketing (highlighted in green), Financial Income, and Institution Settings. Language is set to Chinese (ZH). The central area shows two tabs: "01 Configuration" and "02 Layout and Content Configuration". The "Marketing Email Configuration" section contains fields for "Email Subject" (北大国家发展研究院) and "Reply-to Email Address" (bella.wu@eventbank.com). A callout bubble points to the "Email Subject" field with the text "点此可设置指定发送人" (Click here to set the specified sender). Another callout bubble points to the "Reply-to Email Address" field with the text "回复至的邮件地址" (Email address to reply to). A third callout bubble points to a dropdown menu titled "选择接收者" (Select Recipient) which lists categories like "会员成员" (Member), "活跃会员" (Active Member), "过期会员" (Expired Member), etc., and a total count of "全部联系人 (37 Contacts)". A fourth callout bubble points to a search bar with the text "也可以发给单个联系人" (Also can be sent to individual contacts).

# 营销推广

## ❖邮件营销-不针对某个活动的一般营销邮件-邮件设定

The screenshot shows the 'Marketing Email' setup page in the EventBank system. The top navigation bar includes links for Management Home, Customer Relations, Activity Management, Marketing Email (highlighted in green), Member Management, Financial Income, and Institution Settings. A language switch to Chinese (ZH) is also present.

The main content area is divided into two steps: '01 Configuration' and '02 Layout and Content Configuration'. Step 1 is currently active.

**Marketing Email Configuration**

**Point to set the designated sender:** (指向设置指定发送人)

**Reply-to email address:** (回复至的邮件地址)

**Select recipient:** (选择接收者)

**Also can be sent to individual contacts:** (也可以发给单个联系人)

The configuration screen includes fields for 'Email Subject' (Email Subject) and 'Email Address' (Email Address). A dropdown menu titled 'Select Recipient' (Select Recipient) lists various contact categories and a search bar for individual contacts.

# 营销推广

## ❖邮件营销-不针对某个活动的一般营销邮件-选择模板

Smile Angel Foundation

管理主页 客户关系 活动管理 邮件营销 会员管理 财务收支 机构设置 ZH

控制面板 查看所有营销邮件概况

邮件营销 创建和管理营销邮件

正在编辑的 创建营销邮件

已预定的 编辑已预定的营销邮件

已发送的 查看已发送营销邮件的统计数据

营销邮件模板 通过预定的模板和颜色和节省时间和精力

订阅服务 编辑联系人可订阅的服务列表

发送者设定 为营销邮件设定不同的发送者身份

保存

选择一个页面布局或者您可以自己设计一个页面布局

纯文本 简介: 简约型分布 <a href="#">选择</a>	头尾 简介: 包含头和尾的自定义布局 <a href="#">已选择</a>	1/3左侧栏 简介: 左侧栏简约布局 <a href="#">选择</a>	1/3右侧栏 简介: 右侧栏简约布局 <a href="#">选择</a>

或者通过先创建您的模板来为您之后的邮件保存时间

[保存继续下一步](#)

# 营销推广

## ❖邮件营销-不针对某个活动的一般营销邮件-邮件页面设置

管理主页 客户关系 活动管理 邮件营销 会员管理 财务收支 机构设置 ZH ▲ 🔍

01 设置 02 页面设计设置 03 自定义布局 04 内容

控制面板 查看所有营销邮件概况  
邮件营销 创建和管理营销邮件  
撰稿中的 创建营销邮件  
已预设的 编辑已预设的营销邮件  
已发送的 查看已发送营销邮件的统计数据  
营销邮件模板 通过预设的模板和颜色节省时间和精力  
订阅服务 编辑联系人可订阅的服务列表  
发送者设置 为营销邮件设置不同的发送者身份

标题颜色  
标题背景颜色  
文章标题颜色  
文本颜色  
链接颜色  
背景颜色  
高亮颜色



Title Block

Collaboratively administrate empowered markets via plug-and-play networks. Dynamically procrastinate B2C users after installed base benefits. Dramatically visualize customer directed convergence without revolutionary ROI.

Early American Trade with China



Efficiently unleash cross-media information without cross-media value. Quickly maximize timely deliverables for real-time schemas. Dramatically maintain clicks-and-mortar solutions without functional solutions. Objectively innovate empowered manufactured products.

# 营销推广

## ❖邮件营销-不针对某个活动的一般营销邮件-邮件页面设置

The screenshot shows the EventBank marketing email editor. On the left, a sidebar menu includes '控制面板' (Control Panel), '邮件营销' (Marketing Email) (selected), '已预设的' (Predefined), '已发送的' (Sent), '营销邮件模板' (Marketing Email Templates), '订阅服务' (Subscription Services), and '发送者设定' (Sender Settings). The main area has a toolbar with '保存' (Save), '单栏插入图片' (Single Column Insert Image), '单栏插入文字' (Single Column Insert Text), '发送预览' (Preview), '预约时间' (Schedule Time), and '发送' (Send). A central preview window shows a blue-themed marketing email with the subject 'EventBank Release Notes'. The preview includes a logo, text blocks, and a signature line. A sidebar on the right lists layout options: '称呼' (Greeting), '文章' (Article), '活动' (Activity), '按钮' (Button), '抬头' (Header), '单栏' (Single Column) (selected), '双栏' (Two Columns), '三栏' (Three Columns), and '分隔符' (Separator). A red arrow points from the '单栏' option in the sidebar to the '单栏' button in the preview's toolbar. Another red arrow points from the '单栏' button in the preview's toolbar to the text 'Dear <First Name> <Last Name>,'.

# 营销推广

## ❖邮件营销-预览效果

发件人: EventBank<no-reply@eventbank.com>

收件人: BellaWu<bella.wu@eventbank.com>

时间: 2016年1月7日 (周四) 11:47

大小: 19 KB



Dear Bella Wu,

### Another week, another release!

Or actually a big amount of releases. Anyway, we worked hard, played hard and deployed some great stuff this week.

The items below might be written a bit technical, but you might find the feature you have always been waiting for!

#### [Organizer v3.4.1 Release notes](#)

- Notifications shows on main screen
  - Shows and supports 6 notifications types
  - Imports EventBus lib that communicates during different modules

# 平台操作指南（五）



会员管理

# 会员管理

## ❖会员-设置

中国美国商会

管理主页 客户关系 活动管理 邮件营销 会员管理 财务收支 机构设置

浏览模式： 活动内容 多语言设置

① 控制面板  
查看所有会员的概述

② 会员申请  
会员申请管理

③ 会员管理  
管理活跃会员和已到期会员

④ 续约会员  
管理会员续约

⑤ 财务收支  
查看与会员的转账记录

⑥ 设置  
控制设置、会员类型、申请表格和导入

    设置  
    管理会员内容、申请表格、支付选项和续约选项

    会员类型  
    创建活跃会员类型

    申请表格  
    设置表格收集所有需要的信息

    导入记录  
    查看导入记录、错误报告和状态

保存

内容资料 公共联系人 付款选项 续约选项

以下会员制度将会显示在组织机构公共页面上。推介会员制度和会员权益将是您招募更多新会员的绝佳机会。

会员制度介绍

B I H M W

**AmCham China Memberships**

AmCham China offers two basic membership types: One for companies and another for individuals who are ineligible for corporate membership. The requirements for each kind of membership are shown below.

[Click here](#) for details of AmCham China membership benefits.

保存

App Store Google play

客户服务请联系 support@eventbank.com

隐私政策 使用条款 Powered By EventBank

# 会员管理

## ◆会员-设置

中国美国商会

管理主页 客户关系 活动管理 邮件营销 **会员管理** 财务收支 机构设置

浏览模式： 活动内容 多语言设置

控制面板 查看所有会员的概述

会员申请 会员申请管理

会员管理 管理活跃会员和已到期会员

续约会员 管理会员续期

财务收支 查看与会员的转账记录

设置 控制设置、会员类型、申请表格和导入

设置 管理会员内容、申请表格、支付选项和续约选项

会员类型 创建活跃会员类型

申请表格 设置表格收集所有需要的信息

导入记录 查看导入记录、错误报告和状态

保存

会员制度联系人  
名字: Membership  
姓氏: Department

电子邮箱: membership@amchamchina.org

+86 10-8519 - 0885

以下设定的支付选项将应用到所有创建的会员

选择支付时可使用的货币种类

美元 ×  
人民币 ×  
请选择次要币种

会员资格即将过期通知  
在该会员资格过期前设定发送提醒邮件的时间  
会员资格即将过期通知: 60天

会员资格已过期通知  
在该会员资格过期后设定发送提醒邮件的时间  
会员资格已过期通知: 30天

选择付款类型

允许在线付款  
 允许现金付款  
 允许银行转账付款

转账记录说明: RMB bank transfer  
账户名称: 中国美国商会

保存

# 会员管理

## ◆会员-设置会员类型

The screenshot shows the 'EventBank' membership management interface. On the left, there's a sidebar with various navigation options. The '会员管理' (Membership Management) option is selected. The main content area has a header with tabs: '管理主页' (Management Home), '客户关系' (Customer Relations), '活动管理' (Activity Management), '邮件营销' (Email Marketing), '会员管理' (Membership Management), '财务收支' (Financial Income and Expenditure), and '机构设置' (Organization Settings). The '会员管理' tab is highlighted with a green underline. Below the header are two buttons: '+ 添加个人会员' (Add Individual Member) and '+ 添加公司会员' (Add Company Member). Two blue arrows point down to the '创建会员种类' (Create Membership Type) section. This section includes fields for '您的会员资格的名称' (Name of your membership qualification), '选取会员资格有效期' (Select membership qualification validity period), '会员内部昵称' (Internal nickname for members), and a large text area for '在此填写关于您的会员资格的介绍，及会员可享有的福利' (Fill in the introduction about your membership qualification and the benefits members can enjoy). At the bottom of this section are two checkboxes: '申请加入此会员类型的会员需要经过审核' (Applicants for this membership type need to be reviewed) and '在组织者网站显示此种会员类型' (Display this membership type on the organizer's website). Below this is a '会员价格' (Membership Price) section with notes about payment methods and currency settings. At the very bottom right is a green '创建' (Create) button.

中国美国商会

控制面板  
查看所有会员的概述

会员申请  
会员申请管理

会员管理  
管理活跃会员和已到期会员

续约会员  
管理会员续约

财务收支  
查看与会员的转账记录

设置  
控制设置、会员类型、申请表格和导入

设置  
管理会员内容、申请表格、支付选项和续约选项

会员类型  
创建活跃会员类型

申请表格  
设置表格收集所有需要的信息

导入记录  
查看导入记录、错误报告和状态

管理主页 客户关系 活动管理 邮件营销 **会员管理** 财务收支 机构设置

+ 添加个人会员 + 添加公司会员

浏览

创建会员种类

您的会员资格的名称：

选取会员资格有效期：

会员内部昵称

在此填写关于您的会员资格的介绍，及会员可享有的福利

申请加入此会员类型的会员需要经过审核  在组织者网站显示此种会员类型

会员价格

在**会员设置**页面，您可以设置付款方式及付款币种等更多选项。当会费选项设置为空白时，申请人的会费将会被默认为免费

价格（美元）

价格（人民币）

创建

# 会员管理

## ◆会员-申请表格设置-个人会员

The screenshot shows the 'EventBank' member management interface. The left sidebar has a dark blue background with white text, listing various management sections: Control Panel, Member Application, Member Management, Renewal Members, Financial Receipts, Settings, Member Types, Application Forms, and Import Records. The 'Application Forms' section is currently selected and highlighted in grey.

The main content area has a light blue header bar with tabs: Management Home, Client Relations, Activity Management, Email Marketing, Member Management (which is highlighted in green), Financial Receipts, and Organization Settings. There are also buttons for Save, Browse Mode, Activity Content, and Multi-Language Settings.

A yellow warning message at the top states: "⚠ 您的浏览器默认语言与该组织的默认语言不同，其默认语言是中文。点击此处进行翻译。" (Your browser's default language is different from the organization's default language, which is Chinese. Click here to translate.)

The central part of the screen is titled "Application Form (Member Details)" and "Application Form (Organization Details)". It contains a section for customizing the registration process: "Customize registration flow, set questions to understand participants' preferences. Select the modules you are interested in and sort them." Below this, there is a "Create New Module" section with "Header" and "Footers" fields, and a "Select Default Fields" section listing fields like Phone, Company, Position, Industry, Address, Country, State / Province, and Zip Code, each with a remove icon (trash can).

On the right side, there are several input fields and dropdown menus for personal information: Prefix, Chinese Name, Phone (+86), Cell Phone (+86), Birthday, Citizenship, Home State, Job Level, Job Functionality, Position, and Company. Some fields have validation markers like asterisks (\*) or question marks (?) and checkboxes for required fields.

# 会员管理-现有会员导入

## ◆ 会员-申请表格设置-企业会员

The screenshot shows the AmCham China EventBank application interface. The left sidebar navigation includes:

- 中国美国商会
- 控制面板
- 会员申请
- 会员管理
- 续约会员
- 财务收支
- 设置
- 会员类型
- 申请表格
- 导入记录

The main content area has tabs at the top: 管理主页, 客户关系, 活动管理, 邮件营销, 会员管理 (highlighted in green), 财务收支, 机构设置. Below these are buttons for 保存 (Save) and 浏览模式: 活动内容 (Browsing Mode: Activity Content) and 多语言设置 (Multi-language Settings). A note says: “您的浏览器默认语言与该组织的默认语言不同，其默认语言是中文。点击此处进行翻译。” (Your browser's default language is different from the organization's default language, which is Chinese. Click here to translate.)

The central part of the screen displays two tabs: “申请表 (会员详情)” (Application Form (Member Details)) and “申请表 (机构详情)” (Application Form (Organization Details)). The “申请表 (会员详情)” tab is active. It contains sections for “创建新的版块” (Create New Sections), “选择默认填写项” (Select Default Fill Options), and “Company Contact Information”. The “Company Contact Information” section includes fields for Company Name (Chinese) and English, and checkboxes for “这是必填项” (This is a required field).

Company Contact Information	
公司名称 *	Company Name (Chinese)
(+86) 电话 *	(+86) Fax
<input checked="" type="checkbox"/> 这是必填项	<input type="checkbox"/> 这是必填项
电子邮件	网站
<input type="checkbox"/> 这是必填项	<input type="checkbox"/> 这是必填项

At the bottom, a note states: “(To be used only for AmCham China communications, not for publication or distribution unless authorized)”. The footer includes the EventBank logo, a Confidential - Do Not Disclose notice, and the website www.eventbank.cn.

# 会员管理-现有会员导入

## ❖会员-导入（原有会员）

The screenshot shows the EventBank membership management interface. On the left, there's a sidebar with various menu items like Control Panel, Member Application, Member Management, and Import Record. The 'Member Management' tab is active, highlighted in green. In the center, there's a large blue button labeled 'Import Member'. Above this button, there's a section titled 'Import Your Member Data' with a blue icon of a person with three lines for arms and legs. Below the button, there's a note about downloading member templates and two download links: 'Company Member Import Template' and 'Individual Member Import Template'. To the right of the main area, there's another section titled 'Import Your Member List' with a similar blue icon. It includes a download link for an 'Excel Import Template' and a button to 'Upload Member List File'. A large arrow points from the 'Import Member' button towards the 'Import Your Member List' section.

中国美国商会

管理主页 客户关系 活动管理 邮件营销 会员管理 财务收支 机构设置 ZH

控制面板  
查看所有会员的概述

会员申请  
会员申请管理

会员管理  
管理活跃会员和已到期会员

续约会员  
管理会员续约

财务收支  
查看与会员的转账记录

设置  
控制设置、会员类型、申请表格和导入

设置  
管理会员内容、申请表格、支付选项和续约选项

会员类型  
创建活跃会员类型

申请表格  
设置表格收集所有需要的信息

导入记录  
查看导入记录、错误报告和状态

导入会员

为了更平滑迁移您的数据，请下载以下的会员模板

公司会员导入模板  
个人会员导入模板

导入会员

选择想导入的会员类型

会员类型 \*

确定 取消

导入您的会员数据

导入您的会员列表

为了更好的迁移您的数据，请下载以下模板并通过点击下面的按钮上传数据。

下载excel导入模板

上传会员列表文件

# 会员管理-现有会员导入

## ◆会员-导入（原有会员）

将表头一一对应

01 导入说明 02 选择会员抬头 03 导入报告

请在以下视窗内定义您表格内的区块。您需要完成必要的区块的定义后才能继续导入。

必填信息:	开始日期
会员开始日期	会员开始日期
结束日期	会员结束日期
名字	联系人名字
姓氏	联系人姓氏
电子邮箱	联系人邮箱

范例:	范例:
01-08-16	01-08-16
02-08-16	
小二	
吴	
bella.wu@eventbank.com	
18201536537	
EB	
CS	
小二	

会员开始日期  
范例：01-08-16

会员结束日期  
范例：02-08-16

联系人名字  
范例：小二

联系人姓氏  
范例：吴

联系人邮箱  
范例：bella.wu@eventbank.com

联系人电话  
范例：18201536537

联系人公司  
范例：EB

联系人职位  
范例：CS

名字  
范例：小二

管理主页 客户关系 活动管理 邮件营销 会员管理 财务收支 机构设置 ZH

- 控制面板 查看所有会员的概述
- 会员申请 会员申请管理
- 会员管理 管理活跃会员和已到期会员
- 续约会员 管理会员续约
- 财务收支 查看与会员的转账记录
- 设置 控制设置、会员类型、申请表格和导入  
    设置 管理会员内容、申请表格、支付选项和续约选项
- 会员类型 创建活跃会员类型
- 申请表格 设置表格收集所有需要的信息
- 导入记录 查看导入记录、错误报告和状态

# 会员管理-现有会员导入

## ◆会员-导入（原有会员）

- ① 控制面板  
查看所有会员的概述
- ② 会员申请  
会员申请管理
- ③ 会员管理  
管理活跃会员和已到期会员
- ④ 约约会员  
管理会员预约
- ⑤ 财务收支  
查看与会员的转账记录
- ⑥ 设置  
控制设置、会员类型、申请表格和导入  
  - 设置  
管理会员内容、申请表格、支付选项和  
续约选项
  - 会员类型  
创建活跃会员类型
  - 申请表格  
设置表格收集所有需要的信息
- ⑦ 导入记录  
查看导入记录、错误报告和状态

01 导入说明    02 选择会员抬头    03 导入报告

**会员测试.xls** 准备就绪

日期: 今天下午 3:27      类型: 个人A类会员  
上传者: Bella Wu      label\_membershipAmount: 1  
状态: 导入

**已证实的会员**

② 个人A类会员 #180	吴小二	eb
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激活 取消

# 会员管理-新会员申请

## ◆会员-添加会员申请（新会员）

The screenshot shows the 'EventBank' membership management interface. On the left, there's a sidebar with various navigation options like Control Panel, Member Applications, Pending Review, Pending Payment, etc. The main area has tabs for Management Home, Customer Relations, Activity Management, Email Marketing, Membership Management (which is highlighted in green), Financial Income, and Institution Settings. Below the tabs are two buttons: '+ Add Member Application' and 'Export Application Form'. A large blue callout box points to the 'Member Type' dropdown, which shows 'B Personal A-class Member' and 'Personal Member'. To the right of the dropdown is a table header with columns: 姓名 (Name), 会员类型 (Member Type), 申请时间 (Application Time), and a settings icon. Below the table, a message says 'Currently, there are no new member applications requiring approval.' A second blue callout box points to the 'Please fill in your member details' section, which contains fields for Surname, Name, Email, Position, Company, and Phone Number (+86). A 'Create' button is at the bottom right of this section. At the very bottom, there are links for the App Store and Google Play, and contact information: 'Customer service contact support@eventbank.com'.

管理主页 客户关系 活动管理 邮件营销 **会员管理** 财务收支 机构设置

ZH

+ 添加会员申请 导出申请表

会员类型：

B  
个人A类会员  
个人会员

姓名 会员类型 申请时间

目前没有新增需批准的会员申请。

请选择 取消

请填写您的会员详情

姓氏 \* 名字 \*

电子邮件 \*

职位 公司

(+86) 电话

创建

App Store Google play

客户服务请联系 support@eventbank.com

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# 会员管理-新会员申请

◆会员-受理通知（新会员）-如果此会员类型设置的是需要被审核，则会收到以下邮件

会籍申请审批中 ★

c  
发给 Bella Wu 2016-01-13 16:40 隐私

发件人: C<no-reply@eventbank.com>  
收件人: Bella Wu<bella.wu@eventbank.com>  
时间: 2016年1月13日 (周三) 16:40  
大小: 19 KB



尊敬的Bella Wu，  
感谢您提交申请成为C会员。我们正在审核并会尽快给您回复。审核一经通过，您会收到另一封邮件确认并告知会费的付款方式。

**会员申请详情**

会员申请标识	184
会员申请名称	Bella Wu
会员类型	个人会员
费用	¥ 0.10
申请日期	2016-01-13

如果您有任何疑问请通过邮件[bella.wu@eventbank.com](mailto:bella.wu@eventbank.com)或致电+86 18201536537转会员部联系。

# 会员管理-新会员申请

## ❖会员-批准或拒绝（新会员）

机构可选择批准或拒绝

申请账户名	公司名称	会员姓名	会员类型	申请时间
184	EventBank	Bella Wu	个人会员	2018-06-12 10:00:00

+ 添加会员申请 导出申请表

控制面板 查看所有会员的概述

会员申请 会员申请管理

待审核 同意或拒绝申请

待支付 添加付款信息和备注

未通过审核 查看被拒绝的申请

会员管理 管理活跃会员和已到期会员

续约会员 管理会员续约

财务收支 查看与会员的转账记录

设置 控制设置、会员类型、申请表格和导入

App Store Google play

客户服务请联系 support@eventbank.com

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# 会员管理-新会员申请

## ◆会员-申请-会员通过审核及支付通知（付费会员）

发件人: C<no-reply@eventbank.com>  
收件人: Bella Wu<bella.wu@eventbank.com>  
时间: 2016年1月13日 (周三) 13:53  
大小: 21 KB



尊敬的Bella Wu，

恭喜！您在C的会员申请已经通过了审核，参照下面的付款信息完成支付流程：

如果您选择在线支付，请点击[这里](#)。

付款完成后，您将收到确认电子邮件。

### 会员申请详情

会员申请标识	183
会员申请名称	Bella Wu
会员类型	<a href="#">个人A类会员</a>
费用	¥ 0.10
申请日期	2016-01-13

# 会员管理-新会员申请

## ◆会员-申请-会员支付页面（新会员）

01 申请表格详情

02 付款详情

03 完成订单

请查看您的申请详情和付款状态

个人A类会员

时间长度

价格

6个月

¥0.10

请填写购买者的信息.

电子邮箱:  
bella.wu@eventbank.com

+86 18201536537

姓氏:  
Wu

名字:  
Bella

公司:  
EventBank

职位:  
Customer Success

选择支付方式

用  
银联卡支付

用  
支付宝支付

用  
财付通支付



# 会员管理-新会员申请

## ◆会员-申请-添加付款信息（新会员）

The screenshot shows the EventBank member management interface. The left sidebar has a dark blue background with various menu items. The main content area has a white background with a light gray header bar. The header bar includes links for Management Home, Customer Relations, Activity Management, Email Marketing, Member Management (which is highlighted in green), Financial Income and Expenditure, and Institution Settings. There are also language (ZH), notification, and search icons.

The main content area displays a table of new member applications. The columns are: Application Account Number, Company Name, Member Name, Member Type, and Application Time. One row is shown with the following data:

申请账户名	公司名称	会员姓名	会员类型	申请时间
183	EventBank	Bella Wu	个人A类会员	今天下午 1:48

Below the table, there are several buttons: 'View Application Details', 'Member Switch', 'Reject', '+ Add Payment Information' (which is highlighted in red), 'Personnel Allocation', and '+ Add Remarks'. A large blue arrow points from the text '当收到会员的付款时，点击添加付款' (When receiving payment from a member, click to add payment) up towards the '+ Add Payment Information' button.

Text: 当收到会员的付款时，点击添加付款

Table Data:

申请账户名	公司名称	会员姓名	会员类型	申请时间
183	EventBank	Bella Wu	个人A类会员	今天下午 1:48

Buttons below the table:  
查看申请详情    会员切换    拒绝   + 添加付款信息   人员分配   + 添加备注

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# 会员管理-新会员申请

## ◆会员-成功成为会员通知

欢迎加入C ★

发给 吴小二 2016-01-13 15:38 隐私信息

发件人: C<no-reply@eventbank.com>  
收件人: 吴小二<bella.wu@eventbank.com>  
时间: 2016年1月13日 (周三) 15:38  
大小: 15 KB



尊敬的吴小二，

恭喜您。作为C的会员，您可以获得独家的活动信息以及优惠的会员价格。  
您首先要访问我们的网站，登录至会员专区尊享会员特权。在会员区里您可以注册活动、更新您的公司信息、管理您的会员、订阅杂志和访问会员目录。

我们坚信您会发现您与C建立的关系会让您受益匪浅。希望您愿意把我们推荐给您身边的朋友以及同事。

如果您有任何意见、问题或者疑虑，请致电到+86 18201536537与我们取得联系或者写邮件至[bella\\_21@126.com](mailto:bella_21@126.com)。

再一次恭喜您参与我们。感谢您的支持！  
期待看到您参加我们所举办的活动。

C

# 会员管理-续费

- ◆会员-续费-系统会根据您的设置在会员到期之前发送续费邮件

尊敬的Bella Wu,

这是来自C的问候! 请允许我通知您, 您的会员资格将于2016-02-08过期。希望您已经通过会员资格获得了很多有价值的收获, 同时我们也希望您能够通过成为我们的会员获得更多的价值。

如果您希望对会员资格进行续费, 最快捷的方式就是点击下面的按钮。

## 会员续费详单

会员续费标识	45
会员姓名	WuBella
会籍类别	测试
会费	¥ 0.10
会籍到期日	2016-02-08

会员点击完成续费流程

会员续费

# 平台操作指南（六）



APP