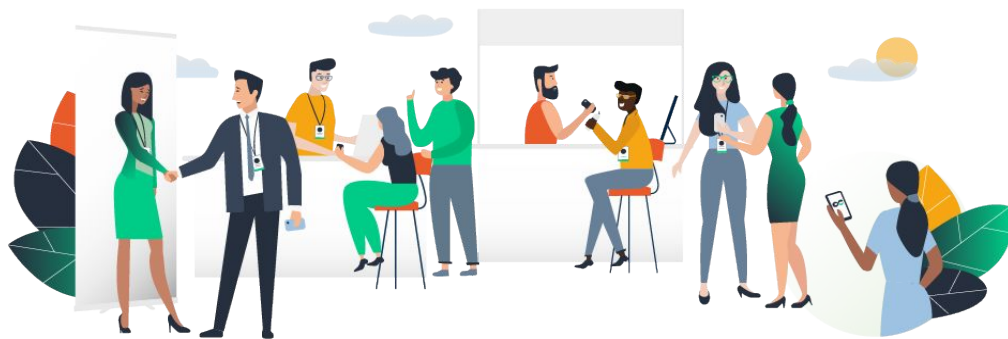


Financial Inclusion Week

How-to Guide



Welcome to Financial Inclusion Week 2021

We will be using a web-based event platform, Swapcard, to host this year's event. This will allow Financial Inclusion Week participants to access events from one platform and engage with fellow participants throughout the course of the week.

As a community-driven event, Financial Inclusion Week relies on your active participation! We request your help promoting the event and encouraging people to register. We invite you to make use of our [FIW Media Kit](#), to assist with promotions.

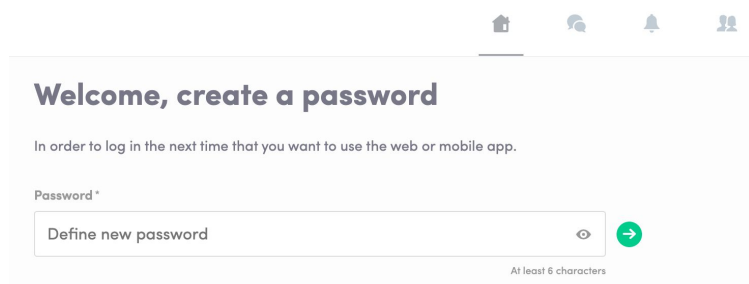
[Registration is now open](#) and registered participants will be notified when the event platform goes live before the event.

We hope you enjoy the event! Please reach out to us at center@accion.org should you have any questions.

**LOG IN AND
EDIT YOUR PROFILE**

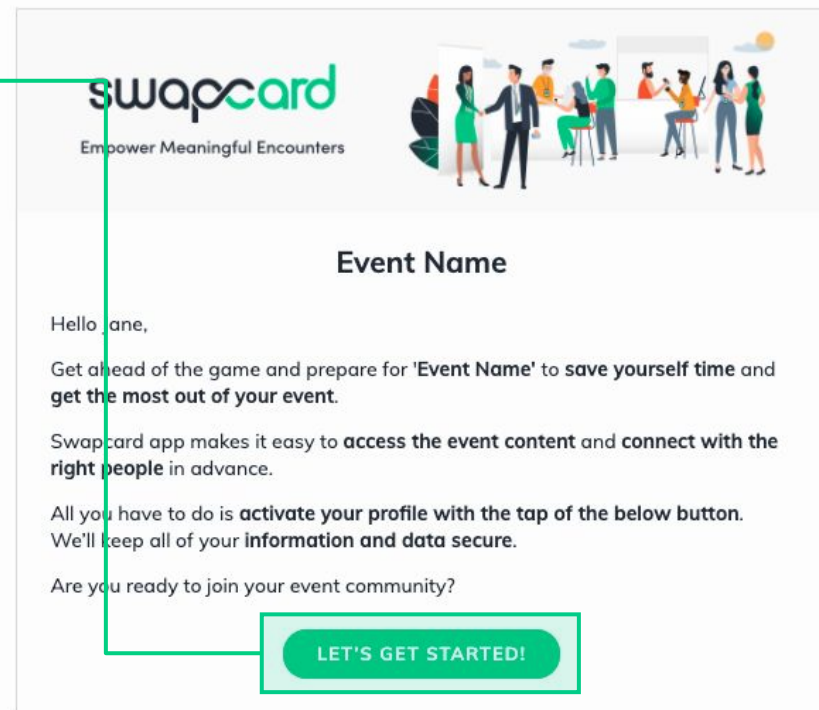
Logging in for the first time

Once the event platform is live (about one week before the event), you will receive an email redirecting you to a login page. It will lead you to your account and you will be requested to create a password.



The screenshot shows the Swapcard login interface. At the top, there are four icons: a house, a speech bubble, a bell, and two people. Below these is the heading 'Welcome, create a password'. A subtext reads: 'In order to log in the next time that you want to use the web or mobile app.' There is a 'Password *' label above a text input field containing 'Define new password'. To the right of the input field is an eye icon and a green arrow icon. Below the input field, it says 'At least 6 characters'.

You can also access the event from your phone by downloading the Swapcard app ([iOS](#)/[Android](#))

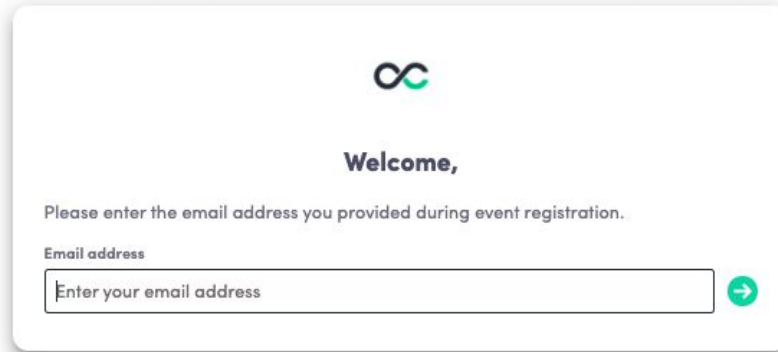


The screenshot shows an email template from Swapcard. The header features the Swapcard logo with the tagline 'Empower Meaningful Encounters' and an illustration of a group of people. The main content area has the heading 'Event Name'. The text reads: 'Hello Jane, Get ahead of the game and prepare for 'Event Name' to **save yourself time and get the most out of your event.** Swapcard app makes it easy to **access the event content** and **connect with the right people** in advance. All you have to do is **activate your profile with the tap of the below button.** We'll keep all of your **information and data secure.** Are you ready to join your event community?' At the bottom, there is a green button with the text 'LET'S GET STARTED!'. A green line connects this button to the 'Define new password' input field in the previous screenshot.

Notes: If you don't see this email in your mailbox, please check your spam.

Logging in every time after

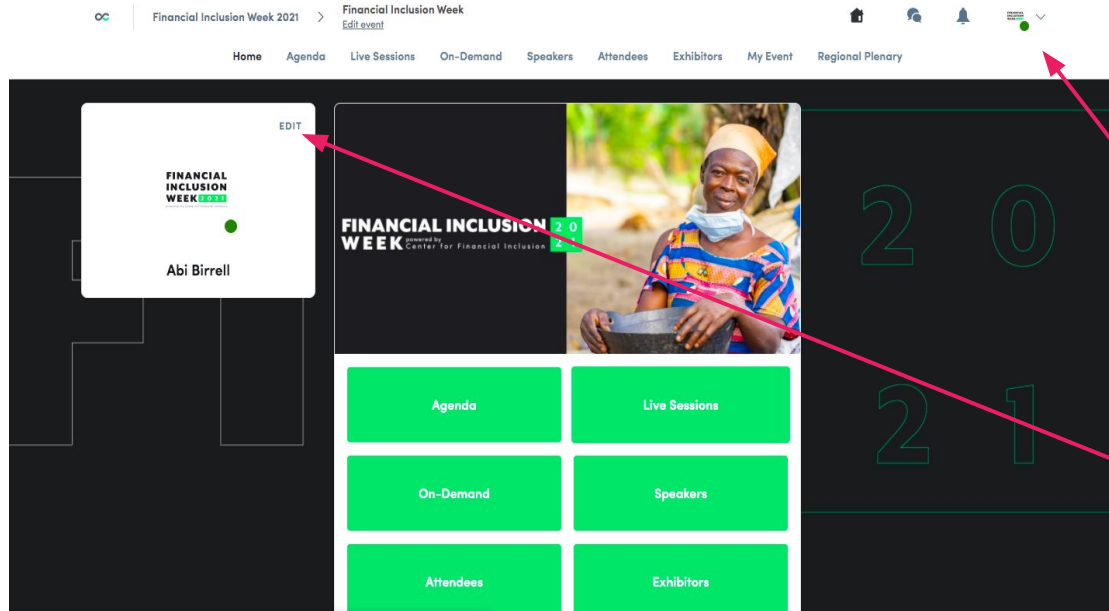
Access your account by going to login.swapcard.com
Enter the email you used to register and then enter your password.
Click the arrow to connect.



The image shows a login form for Swapcard. At the top is the Swapcard logo, an infinity symbol with a green dot. Below it is the text "Welcome,". Then, a prompt: "Please enter the email address you provided during event registration." Below that is the label "Email address". There is a text input field with the placeholder text "Enter your email address". To the right of the input field is a green circular button with a white right-pointing arrow.

Note: If you have forgotten your password after entering your email, click on **send me a magic link**.
You'll receive an email to reset your password. If you need help, please contact support [here](#).

How to edit your profile (1/2)



There are two ways to
access your profile:

1

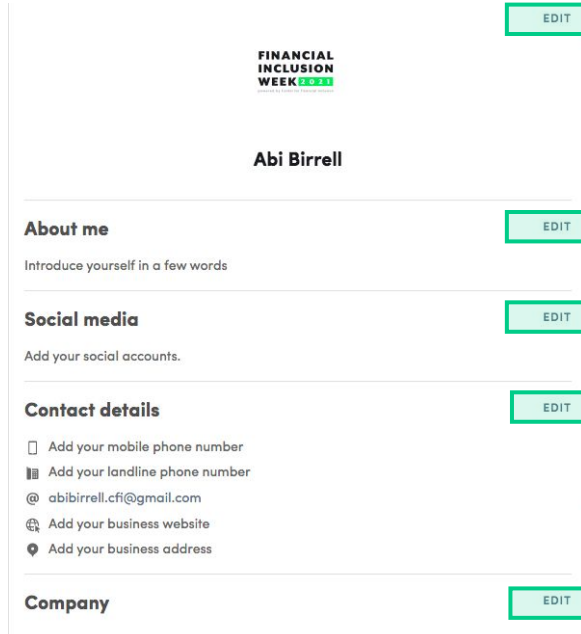
From the drop-down on the
upper-right corner of your
screen, click **My profile**.

2

On the left side of your screen
next to your photo, click **Edit**.

You'll be redirected to your profile
where you can edit your information.

How to edit your profile (2/2)



The screenshot shows a user profile for 'Abi Birrell'. At the top, there is a header section with a logo for 'FINANCIAL INCLUSION WEEK 2021' and an 'EDIT' button. Below this is the 'About me' section with a placeholder text 'Introduce yourself in a few words' and an 'EDIT' button. The 'Social media' section has a placeholder 'Add your social accounts.' and an 'EDIT' button. The 'Contact details' section lists fields for mobile phone number, landline phone number, email (pre-filled with 'abibirrell.cfi@gmail.com'), business website, and business address, with an 'EDIT' button. The 'Company' section at the bottom has an 'EDIT' button.

FINANCIAL INCLUSION WEEK 2021

Abi Birrell

About me EDIT

Introduce yourself in a few words

Social media EDIT

Add your social accounts.

Contact details EDIT

- ☎ Add your mobile phone number
- ☎ Add your landline phone number
- @ abibirrell.cfi@gmail.com
- 🌐 Add your business website
- 📍 Add your business address

Company EDIT

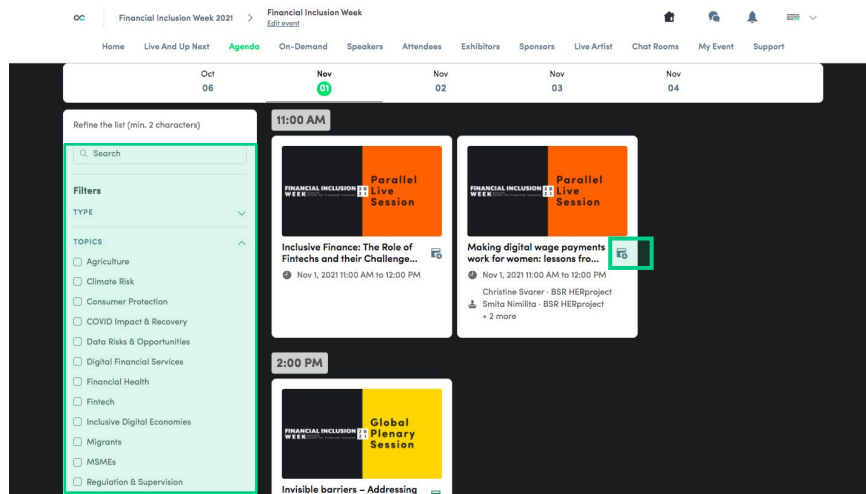
To edit your profile, click **Edit** or **Add** next to the information section you want to edit.

Here is the information you can edit:

- Personal information
- Skills
- Biography
- Social Media
- Contact details
- Company

How to Access FIW Content

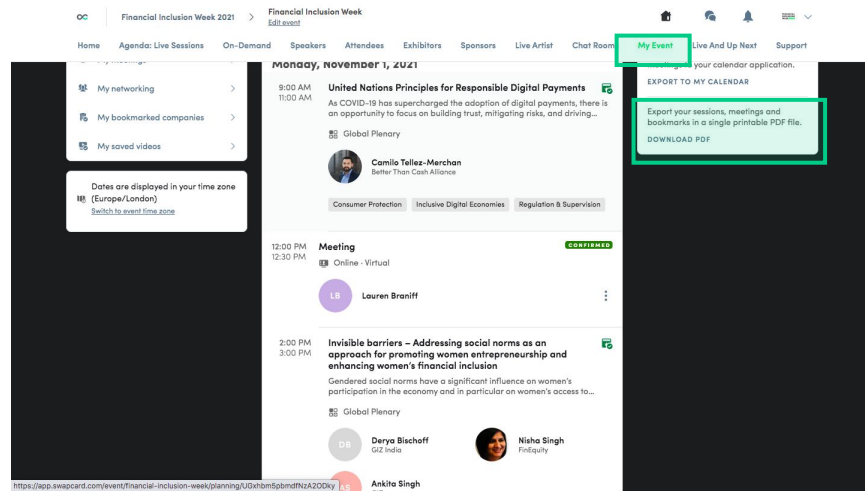
Manage Your Event Schedule



The **My Event** tab allows you to see your own schedule and bookmarked content.

You can **export your schedule** by clicking “Export to my calendar” or “Download PDF.” Note that exporting to calendar will create a .ics calendar invite, which will add your schedule to your computer’s default calendar. If needed, you can find guidance online to set up your preferred calendar to open the .ics file.

Browse the agenda and on-demand content using the **search** bar and **filters** located on the left side of the screen. The **bookmark icon** will save on-demand sessions to your personal agenda and the **add to calendar** button will save live sessions in your event calendar.



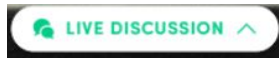
How to Interact During a Session

Using the **Live discussion**, you can **Chat** with other attendees, ask **Questions** to the speakers, and answer **Polls** created by the organizers or speakers.

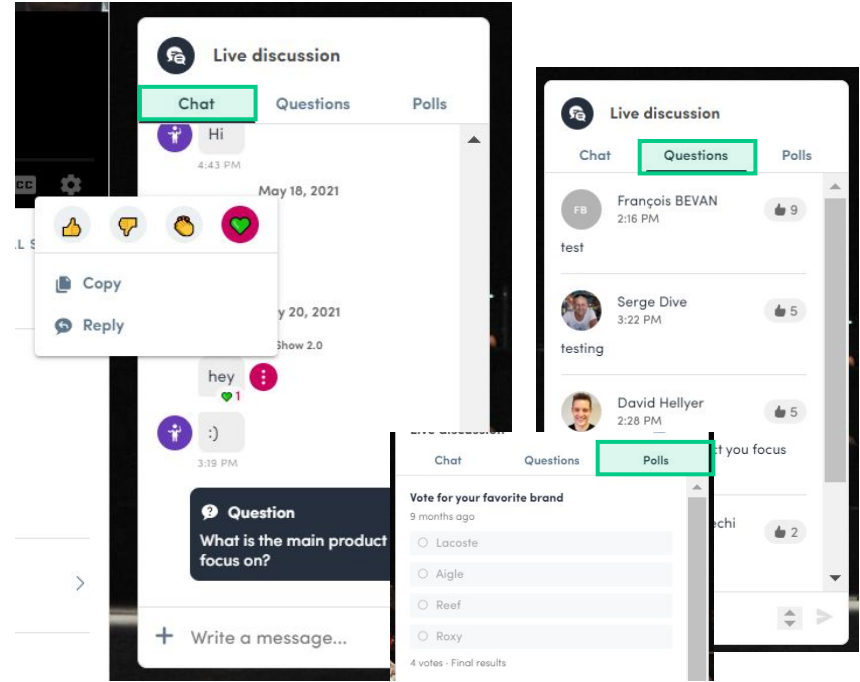
You can react and reply to other people's messages.

Questions will be sorted by upvotes where the most liked questions will rise to the top.

The live discussion should open when sessions are ongoing. If you do not see it, click on the bubble on the bottom right to open it.



If you need to delete your message, click on the three dots next to your message.

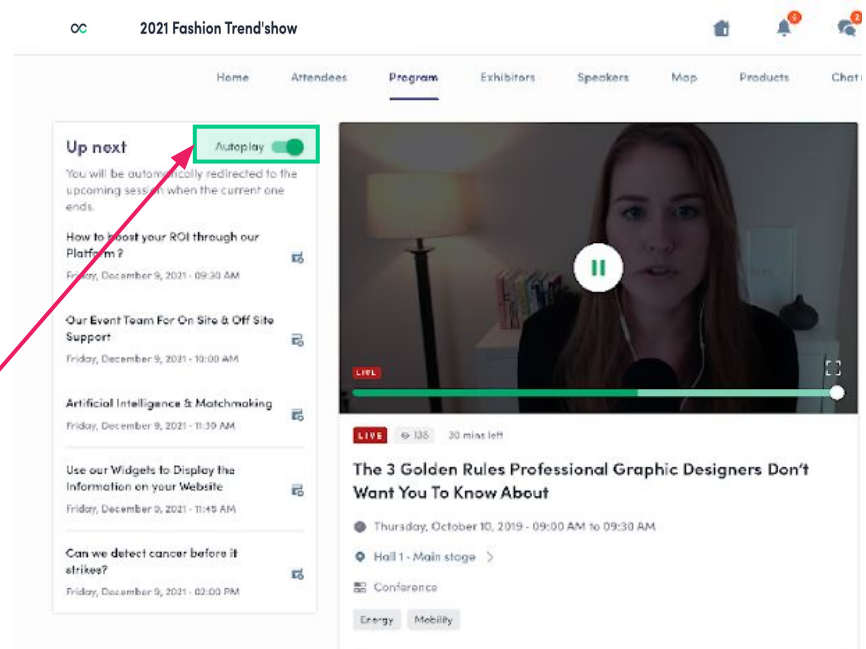


What is Auto-Follow?

The auto-follow feature is activated by default when you click on a “Live” schedule button.

This feature allows a seamless experience when watching sessions and will take you from one session to the next every time a session is completed.

To deactivate it, simply **toggle Autoplay off** on the upper left side of your screen.



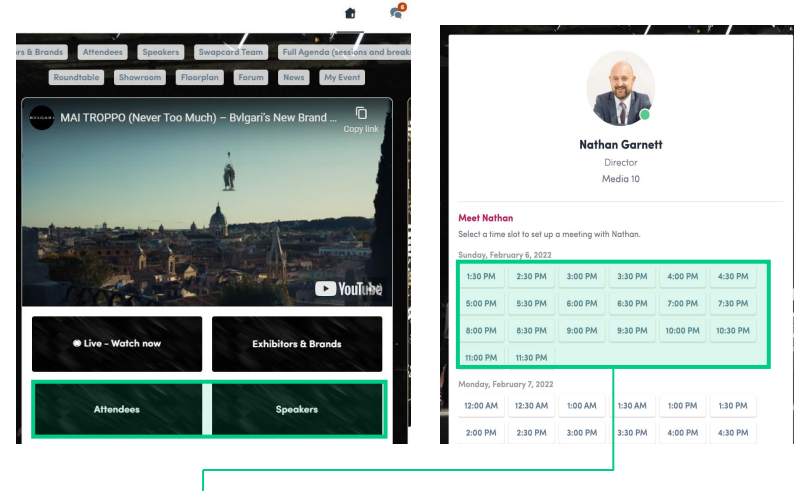
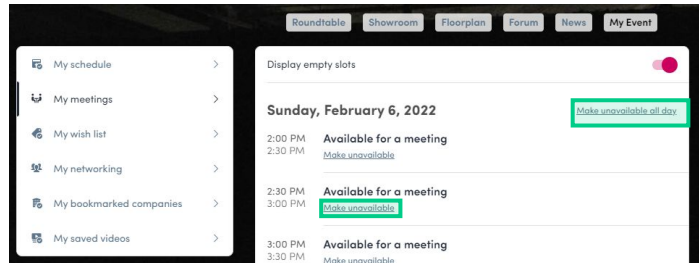
Note: The auto-follow is never active if you arrive on the session page without clicking a live button or tab.

How to Connect and Network with FIW Attendees

Networking

From either the home page or the top navigation bar, you can access the **Speaker** and **Attendee** lists.

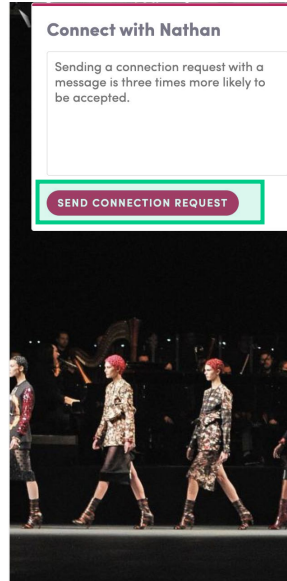
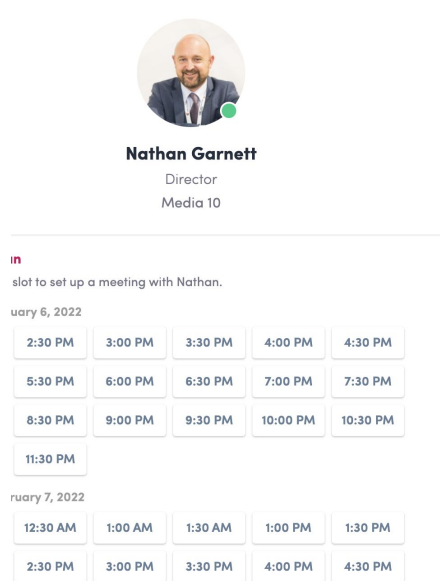
Here you can search and find people to connect with. You can chat, have video calls, and book virtual meetings.



If you see **time slots** appearing on people's profiles, these are the times they are available for you to book meetings with them. Slots disappear once booked.

You can manage your own **availability for meetings** by going to the **"My meetings"** tab in **"My Event"**. Making yourself unavailable all day or at specific times will remove meeting slots.

How to Send a Connection Request



To send a connection request, go to an individual's profile (via the list of participants, speakers or a company profile) and click the **Send connection request** button.

Tip: Add a note to your connection request to introduce yourself and explain the reason for your request.

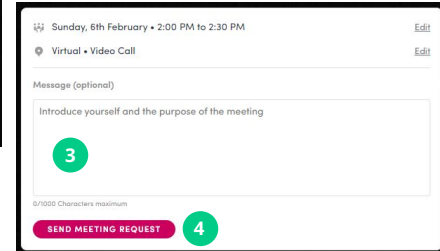
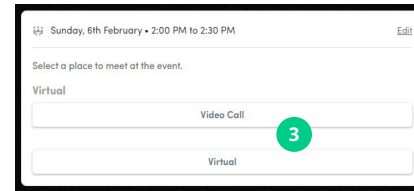
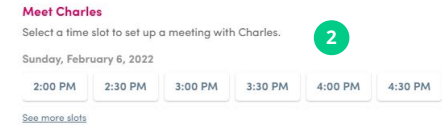
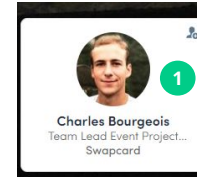
You will be able to find a full list of your connections by going to **"My Event"** and then **"My Networking"**



Note: Accepting a meeting will automatically make the person who requested the meeting one of your connections with access to your complete profile.

How to Request a Meeting

- 1 Access an individual's profile (i.e.: from the Attendees button)
- 2 Click on one of the suggested meeting slots.
For more slots click "see more slots"
- 3 Select a time slot and choose "virtual" as your location.
Include a note to the person you would like to meet.
- 4 Once done, click **Send meeting request**



- Note:** For this event, you can only meet online, so please choose "virtual" for location.

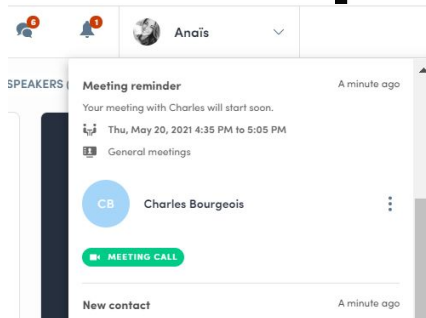
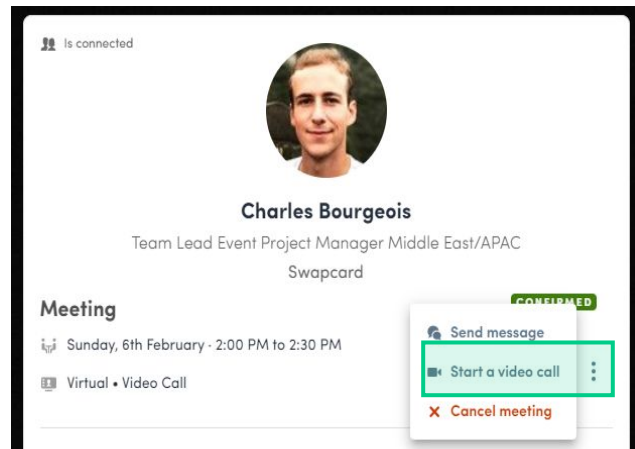
How to Have a Virtual Meeting

5 minutes before a virtual meeting you will receive a reminder email from which you can click to access the meeting.

If you are already on the platform you can start the meeting by going to the profile of the person you have a meeting with, and click the "**Meeting call**" button.

This will launch the video call. This button is only available if the meeting is confirmed.

i Note: You can also access a meeting directly from the meeting notification.



**Thank you for taking the
time to review these guidelines. We are excited to
have you participate in this year's Financial
Inclusion Week.**

If you have any questions, please feel free to contact
center@accion.org