

# Manual for setting up your profile

Version June 2017

**CLICK: Become A Member**

This guide will help you set up your account at the Swiss Finance + Technology Association. The manual covers all steps necessary for an

1. Individual Membership
2. Partner Membership
3. Corporate / Start-Up Membership

	Individual	Partners	Corporate / Start-Ups
Create a profile	Yes	Yes	Yes
Visit the Directory and see profiles	Yes	Yes	Yes
View Deals	Yes	Yes	Yes
Add events to our events' page		Yes	Yes
Add offers to our deals' page		Yes	Yes

## Getting Started – general

**Step1:** Scroll down + add your details:

Account name	<input type="text" value="Full name or company name"/>
Contact name	<input type="text" value="Full name"/>
Position	<input type="text"/>
Address	<input type="text"/>
	<input type="text" value="City, state/province, postal code"/>
Email	<input type="text" value="Required"/>
Phone	<input type="text"/>
Website	<input type="text"/>

**Step2:** Select Relevant Package + click “Join now!”

Corporate Packages  
The Corporate Package fees vary from 5,000 to 50,000 CHF. Please note, only individual people may register as members, but each Corporate Package includes a minimum number of Individual Memberships. Thank you!

Startup Package  
The Startup Package fee is 500 CHF each year. Please note, only individual people may register as members. Each Startup Package includes two Individual Memberships and additional benefits in line with the "Bronze" Corporate Package. Thank you!

Individual Membership  
The membership fee is 100 CHF. Please note, only individual people may register as members. We offer packages for startups, companies, and partners. Also, please select only one label which best describes your member category (e.g. investor, entrepreneur, financial pro, etc.). Thank you

Partners Package  
The Partners Package is free, but only available to relevant and active partners of the Association. We encourage new partners to sign up and our team will reply swiftly. Please note, only individual people may register as members. Each Partner Package includes listing and access for contacts from your organisation listed under the main profile. Thank you!

**Optional:** Set Privacy Setting

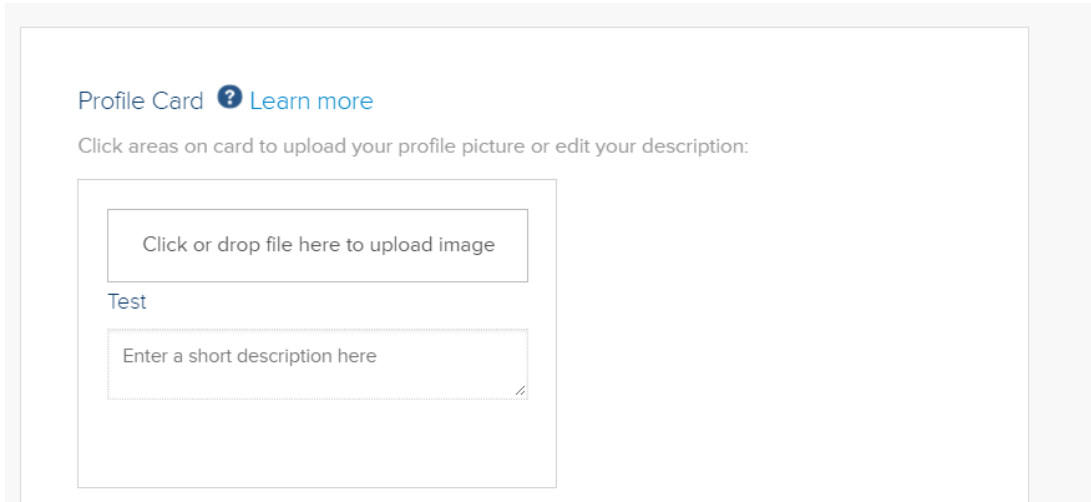
Account Profile Contacts

Do not show street address in profile

Do not show phone number

### Step3: Add a visual

- Individual members: please add a profile picture
- Partners and Corporate / Start-Ups: please add your logo



Profile Card [? Learn more](#)

Click areas on card to upload your profile picture or edit your description:

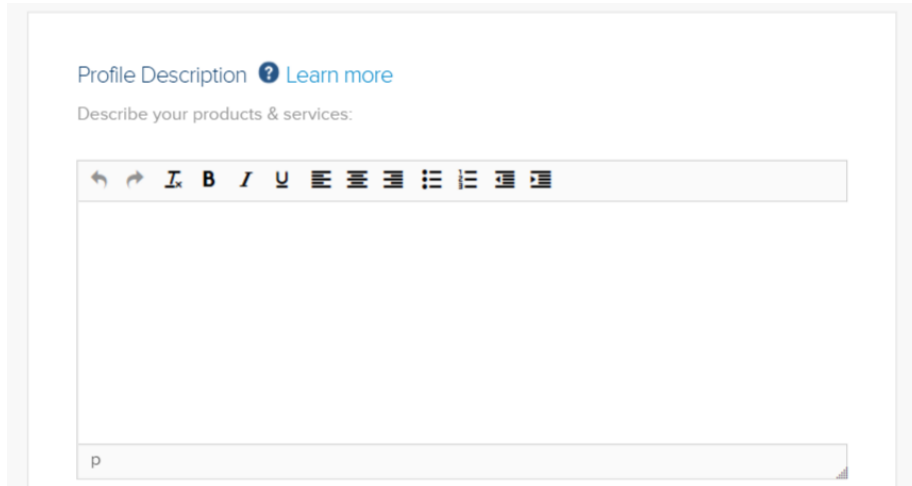
Click or drop file here to upload image

Test

Enter a short description here


### Step4: Add your description

- Individual members: please describe yourself and your background
- Partners and Corporate / Start-Ups: please add your company description



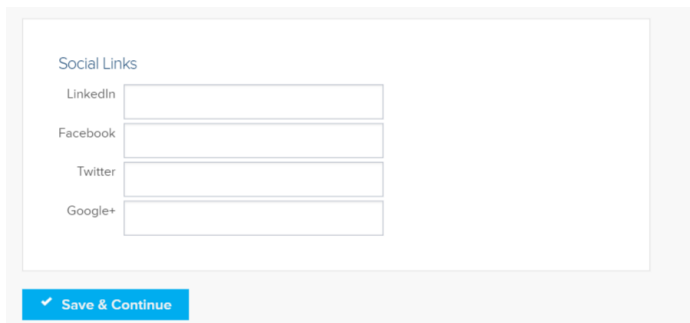
Profile Description [? Learn more](#)

Describe your products & services:

← → *I* **B** / U 

p

### Step5: Add Social Media + Save. This helps us to communicate to you properly



Social Links

LinkedIn

Facebook

Twitter

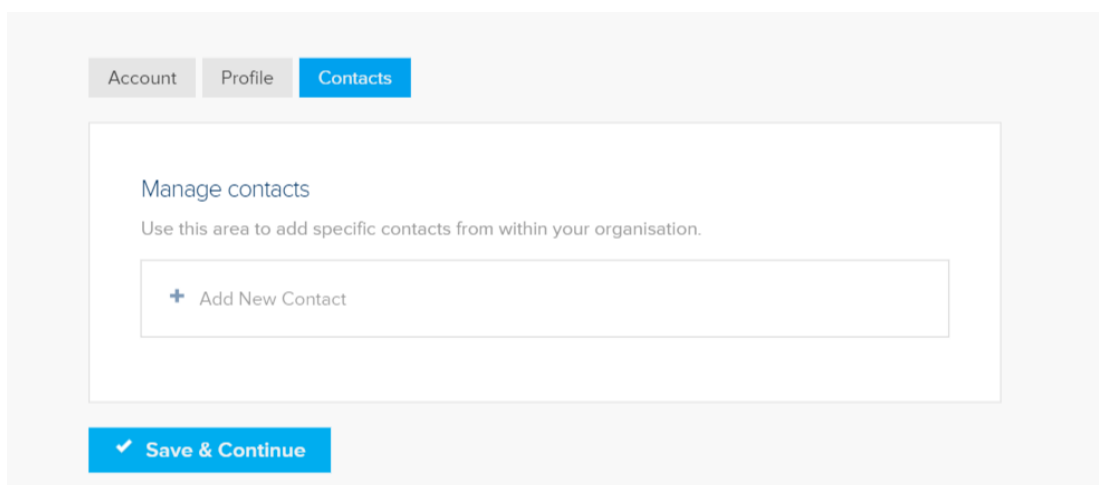
Google+

Save & Continue

## Getting Started – general Partners and Corporate / Start-Ups

*This is only available for Partners and Corporate / Start-Ups*

**Step6:** Add the contacts you want to share under your account



Account Profile **Contacts**

Manage contacts

Use this area to add specific contacts from within your organisation.

Save & Continue

This is all you need to set-up your account.

## Membership Tip

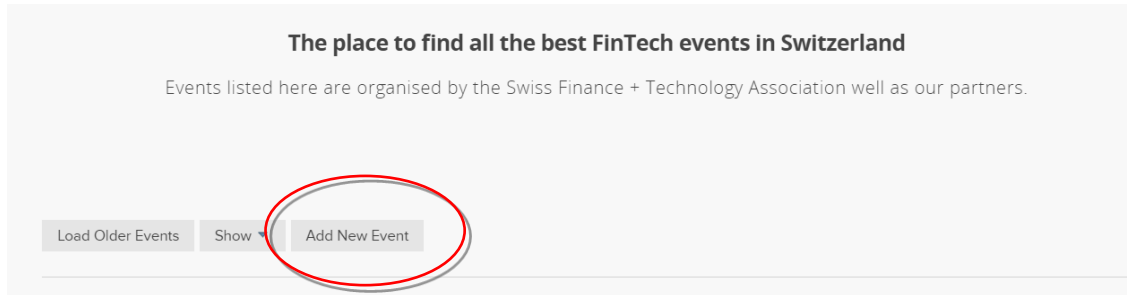
With these 5 steps you can get the most from our network:

1. Use the membership works on a regular basis and keep it up to date.
2. Read our articles, join our LinkedIn discussions and come to our events.
3. Make sure you use our twitter (@finnovation) handle and post your activity with us.
4. Become a volunteer and contribute through content.
5. Become a subject matter expert and lead the discussion with our working groups.

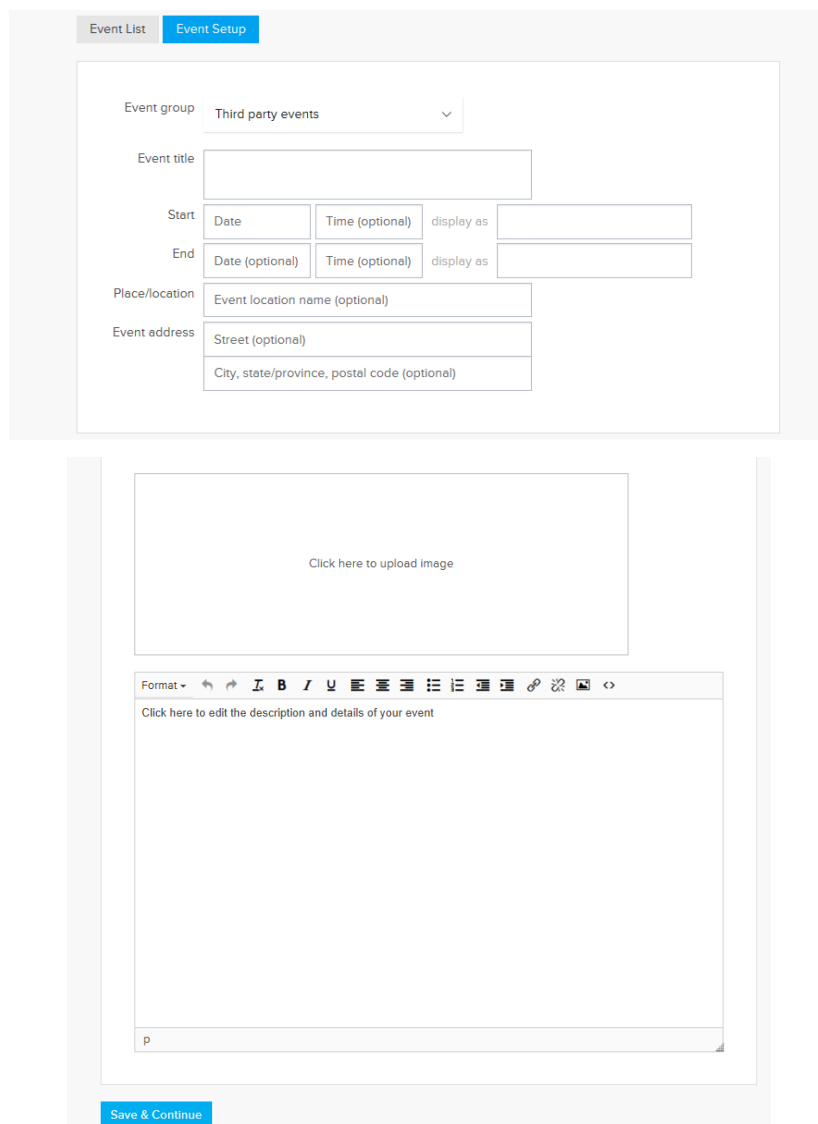
## Setting up Events

*This is only available for Partners and Corporate / Start-Ups. All members can view the deals.*

EVENTS: [Link](#) + click on “Add New Event”



Step1: Fill in your details



Event List Event Setup

Event group: Third party events

Event title: [Text input]

Start: Date [Text input] Time (optional) [Text input] display as [Text input]

End: Date (optional) [Text input] Time (optional) [Text input] display as [Text input]

Place/location: Event location name (optional) [Text input]

Event address: Street (optional) [Text input]  
City, state/province, postal code (optional) [Text input]

Click here to upload image

Format [Dropdown] [Undo] [Redo] [Bold] [Italic] [Text color] [Background color] [List] [Link] [Image] [Code]

Click here to edit the description and details of your event

p

Save & Continue

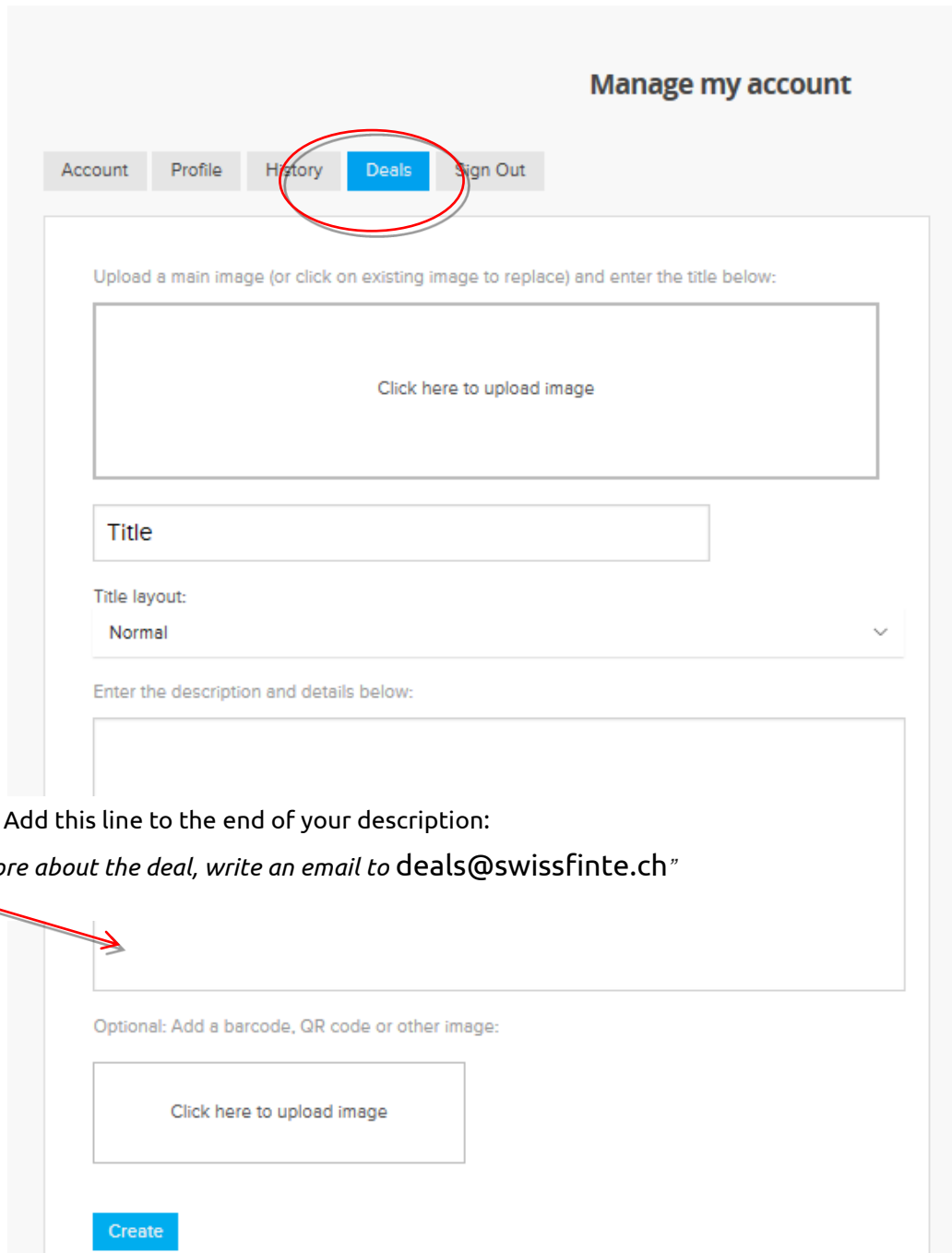
Save event to publish on our event website.

## Creating Deals (for Partners and Companies)

*This is only available for Partners and Corporate / Start-Ups. All members can view the deals.*

Provide value to your profile, and generate leads, with member deals for the community!

**Step1:** Under "[manage my account](#)" Fill in your details



The screenshot shows the 'Manage my account' interface. At the top right, the title 'Manage my account' is displayed. Below it is a navigation bar with tabs: 'Account', 'Profile', 'History', 'Deals', and 'Sign Out'. The 'Deals' tab is highlighted in blue and circled in red. The main content area contains the following elements:

- Instruction: 'Upload a main image (or click on existing image to replace) and enter the title below:'
- Image upload area: A large rectangular box with the text 'Click here to upload image' centered inside.
- Title input: A text box labeled 'Title'.
- Title layout: A dropdown menu labeled 'Title layout:' with 'Normal' selected and a downward arrow.
- Description input: A large text area with the instruction 'Enter the description and details below:' above it.
- Optional image upload: A section labeled 'Optional: Add a barcode, QR code or other image:' with a smaller 'Click here to upload image' box below it.
- Create button: A blue button labeled 'Create' at the bottom left of the form area.

**Important** - Add this line to the end of your description:

*"To learn more about the deal, write an email to [deals@swissfinte.ch](mailto:deals@swissfinte.ch)"*



Save. Once confirmed it will appear on our Deals section under membership works.