AI for Finance

SEPTEMBER 10, 2020

YOUR PARTNER DIGITAL BOOTH

Functions of your partner booth

- Reach your digital booth and personal profile
- Fulfill your company information
- Add your team members
- Fulfill the tasks given by the organizing team
- Get support to lead you in your digital booth
- Manage your reduction codes
- Organize online appointments
- Your messages
- Manage your leads

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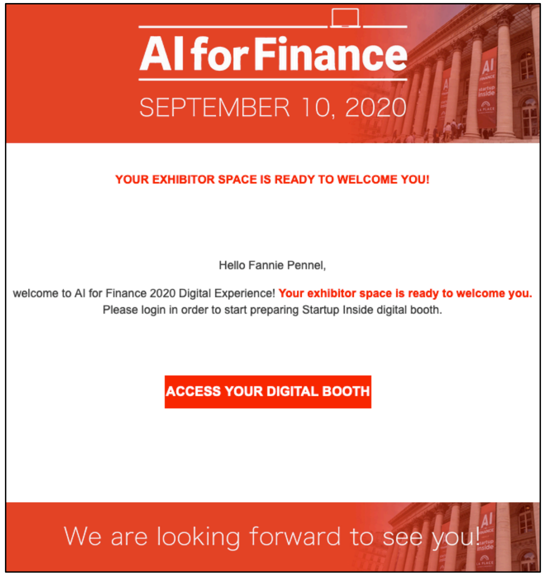
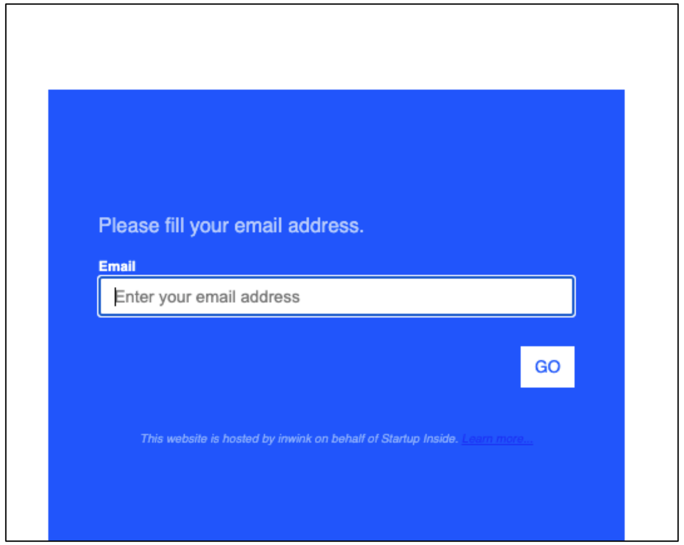
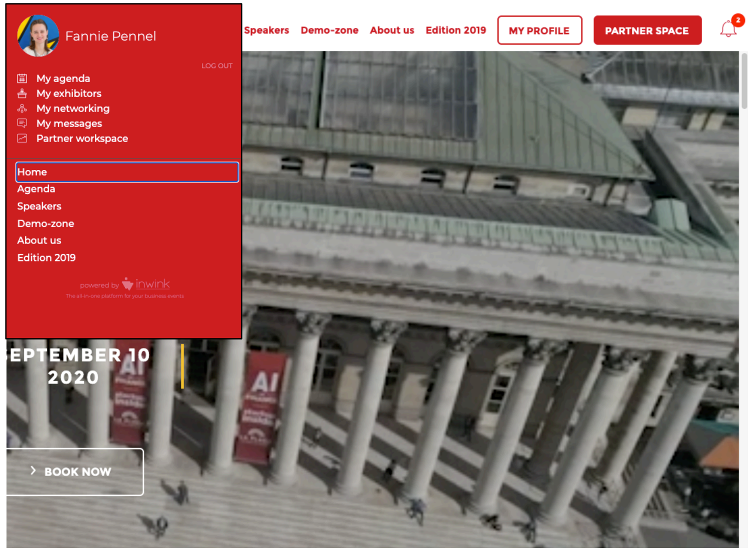
Reach your digital booth and personal profile







Receive your invitation mail

The administrator of your team will receive a personnal email to access to his/her personnal profile. This profile is linked to the partner digital booth.

Login to your personnal profile

Follow the link and log in to AI for Finance digital platform.

Choose a password, we recommand you to save it in your browser.

Discover your personnal space

On the top right of your page you have access to both your partner space and your personnal profile.

You also have access to these informations through the burger menu on your left, easier on smartphones.

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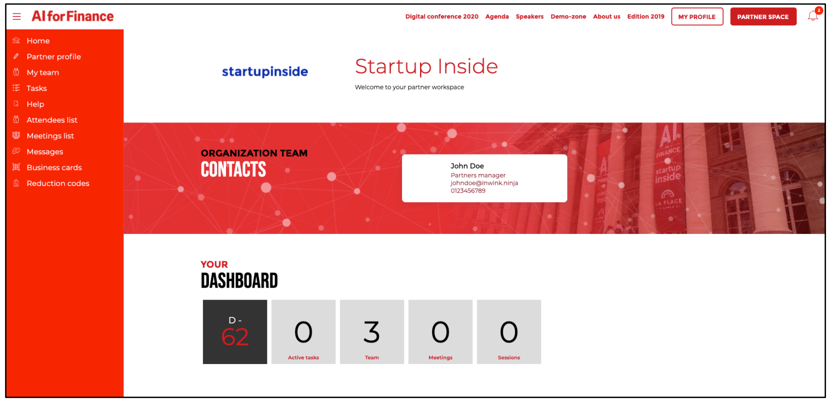
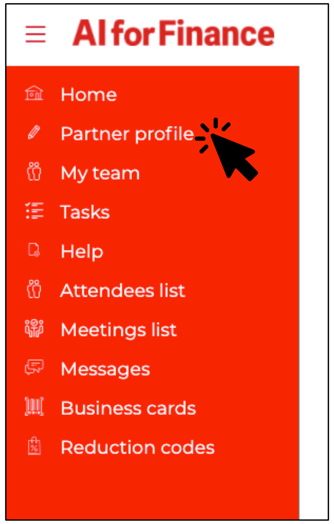
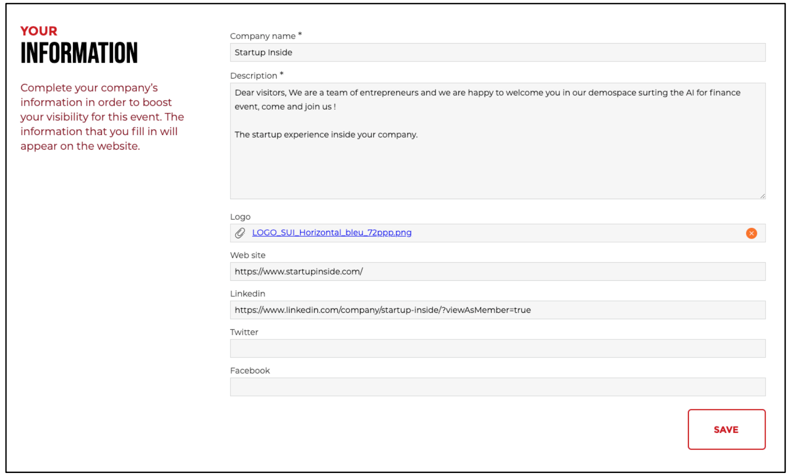
Fulfill your company information







Reach your partner booth

You reach automatically your Home page where you can read the main contact and your dashboard.

Click on « Partner profile »

To reach your main information.

Fulfill with your information

This is the place to personnalize your booth by adding the global information about your company.

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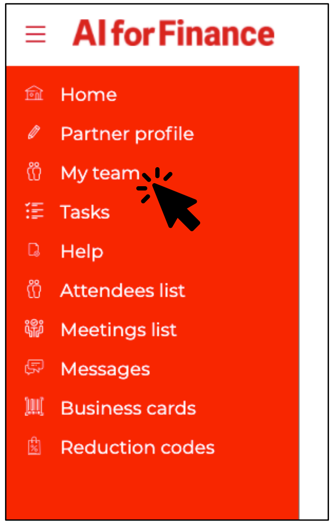
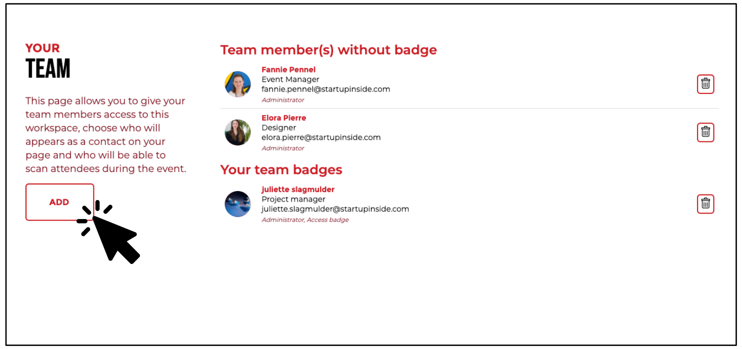
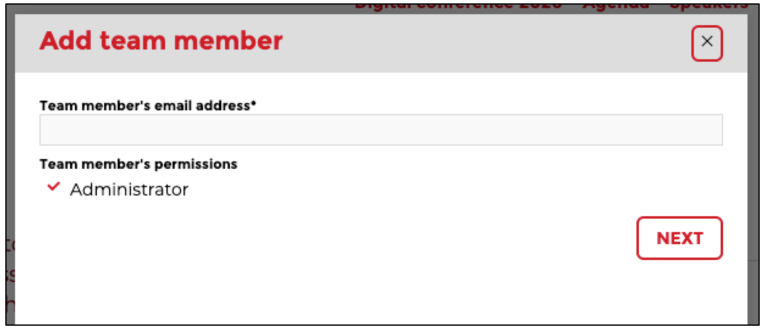
Add your team members







Click on « My team »

To reach the page with your team dashboard.

Overview on your team

You have here an overview of your team members and their status.

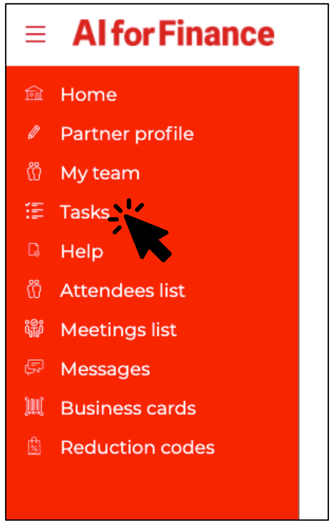
Click on « Add » in order to add new team members.

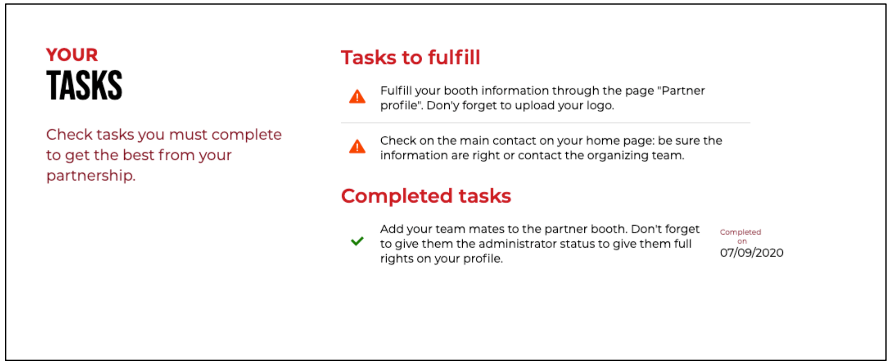
Add new members

Enter the email adress of your team mates et chose « administrator » to garantee the access to the full fonctionnalities of your partner profile.

Your team mates will soon receive an email and access hi/her profile the same way than yourself.

Fulfill the tasks given by the organizing team





Click on « Tasks»

To reach the page with your tasks* list.

*These tasks are given to you to help you in the configuration of your partner profile. You might receive new tasks until the event.

Overview on your tasks

Check the tasks to fulfill and the tasks already completed. Every members of the team can complete and thick a task.

Validate the task when complete

Click on the task and click on « validate ». The task goes automatically in « completed tasks ».

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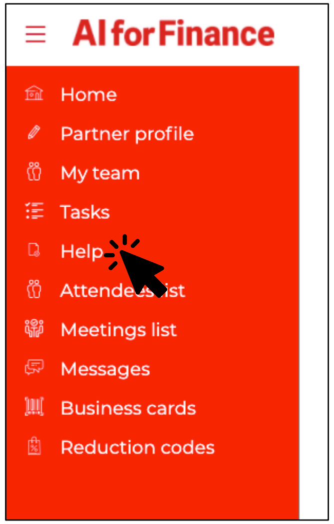
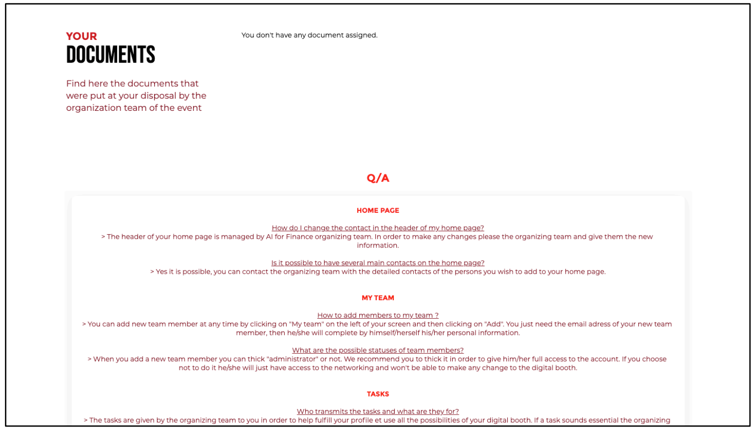
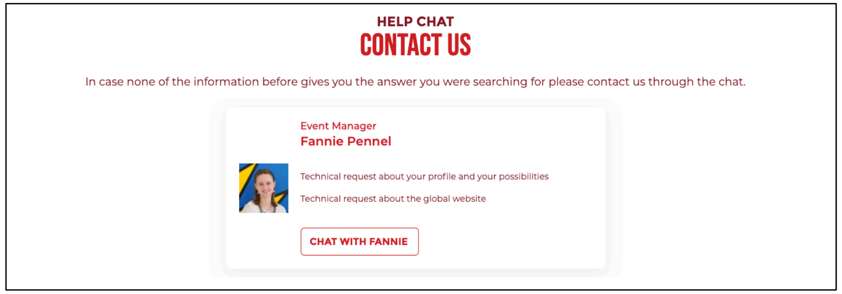
Get support







Click on « Help»

To reach the support page.

What help you can get

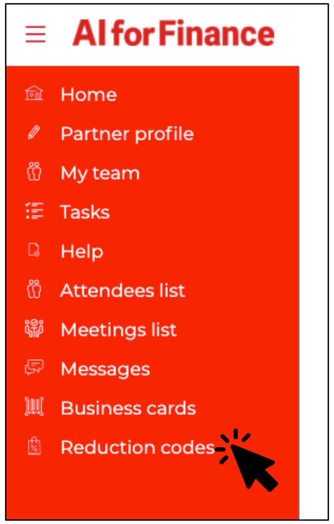
On this page you will find the tutorials documents such as this one to give you a detailed process to use your profile.

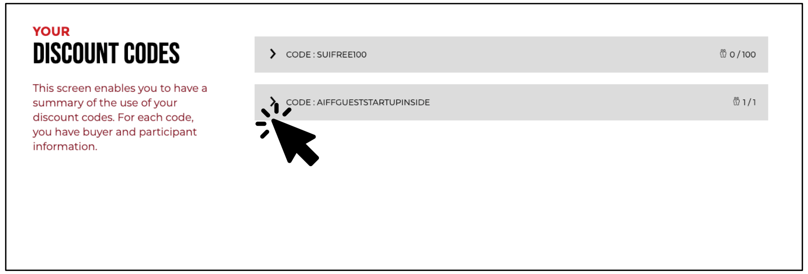
You will also find a Q/A.

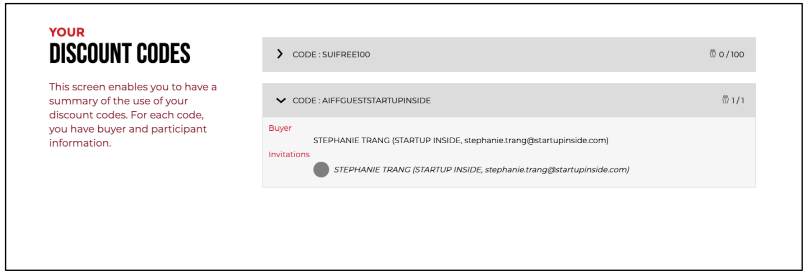
Chat with organizing team

In case none of these gives you the answer you were searching for you will be able to contact the organizing team at the bottom of the « Help » page.

Manage your Reduction codes







Click on « Reduction codes»

To reach the promotional codes page.

Summary of your codes

On this page you will find the complete list of your codes.

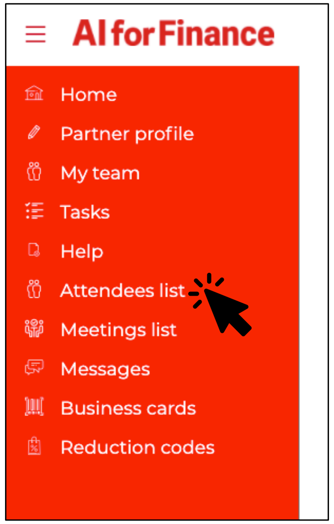
Click on each of them to have more details.

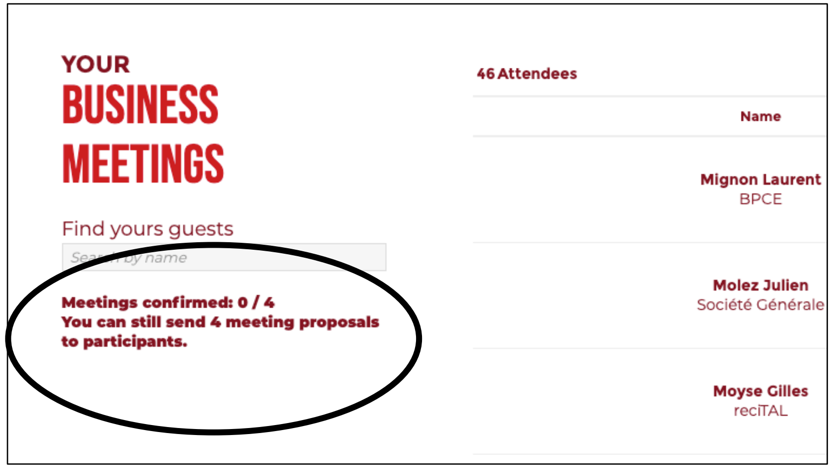
Details of each of your code

Follow here how your codes are used:

- How many of them were used
- Who used them

Organize online appointments





Click on « Attendees list »

To reach the attendees list page.

See who is attending

You have access here to the list of attendees allowing networking. You can search a specific attendee or scroll the list.

See the number of meetings you have

Check here the number of business meetings you can organize. If you need more or if you have a problem, please contact the support.

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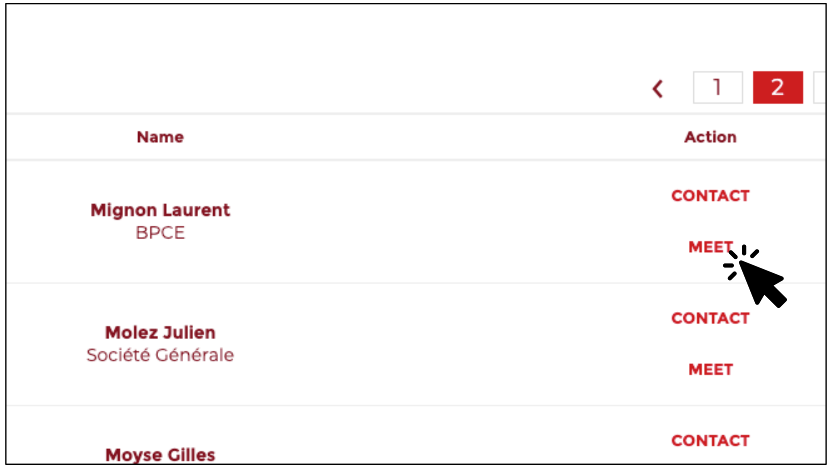
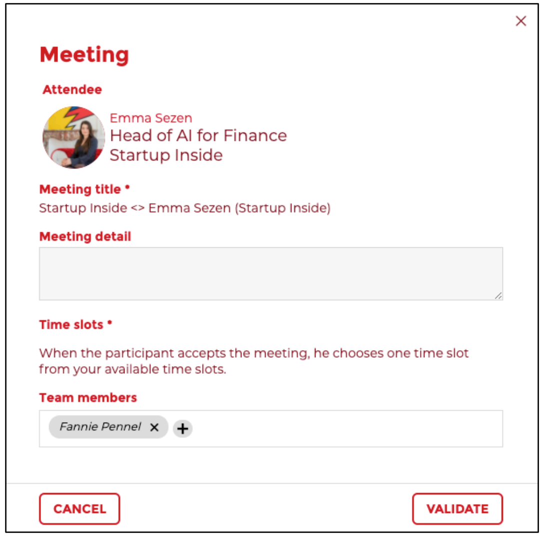
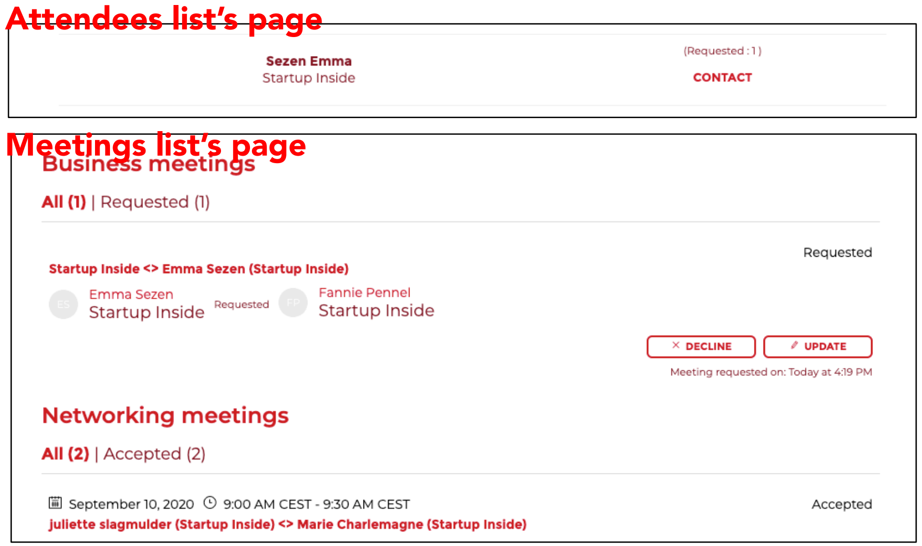
Organize online appointments







Organize a meeting

Click on « meet » to propose a meeting slot to an attendee.

More precisions

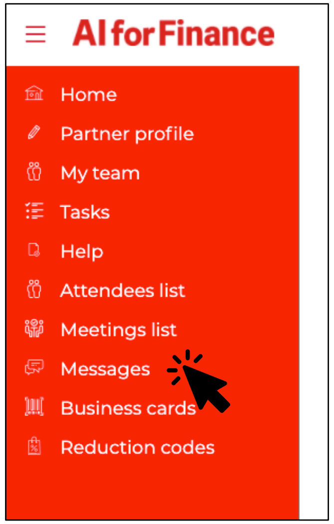
A pop-up window is opening. You can send a message to the attendee, you can choose who from your team will attend the meeting with this person.

Then it is up to the participant to confirm your demande and to chose among your time slots available which one he/she prefers.

Wait for the validation

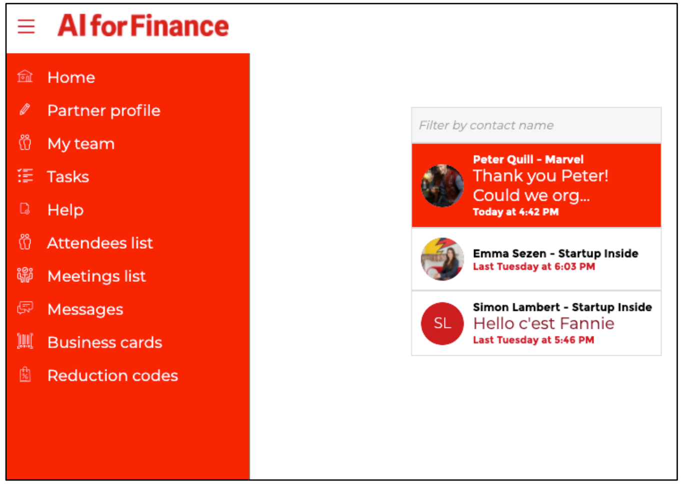
You can see your requests pending on both the attendees list and your meeting list.

Your messages



Click on « Messages «

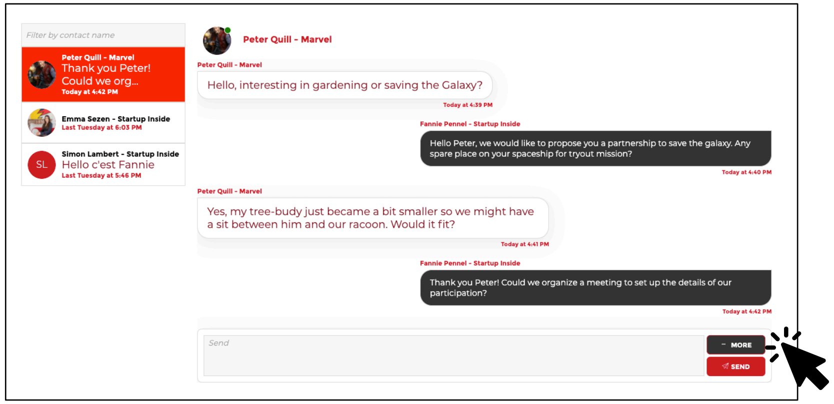
To reach your messages.



All your messages

Here you can see all the discussions between your digital booth and the attendees.

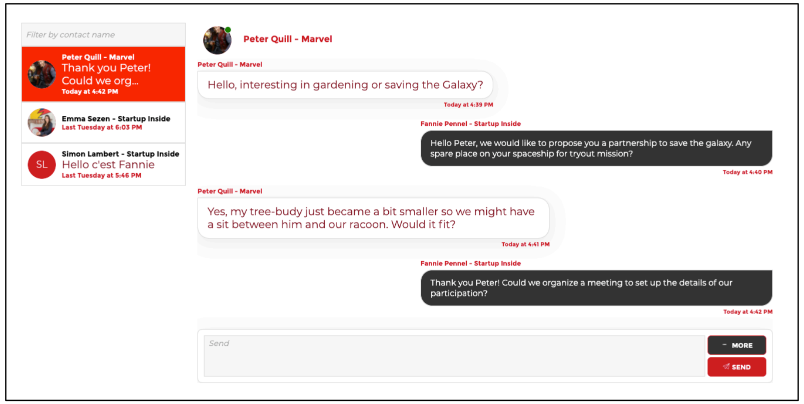
Every member of your team can take part to the discussions.

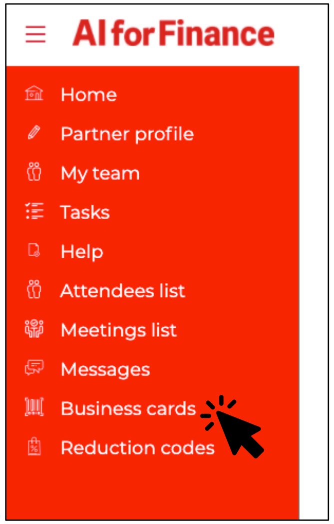


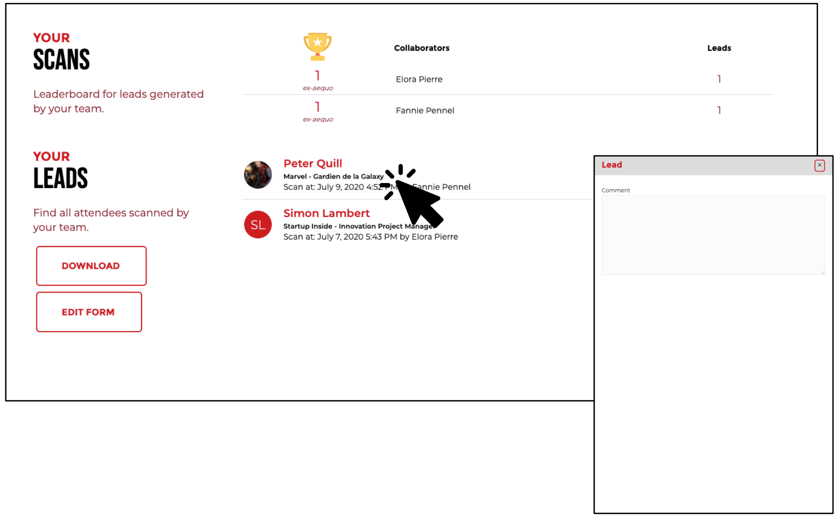
Details of a message

By clicking on « more » you have more actions you can do to interract with the attendees.

Manage your leads







Share contacts with an attendee

When talking to an attendee you can ask for his/her business card.

The information will go automatically in your « business cards » page.

See all your business cards

Click to « business cards « to see all your leads.

Your leads

On this page find all your leads. By clicking on one of them you can add comments.

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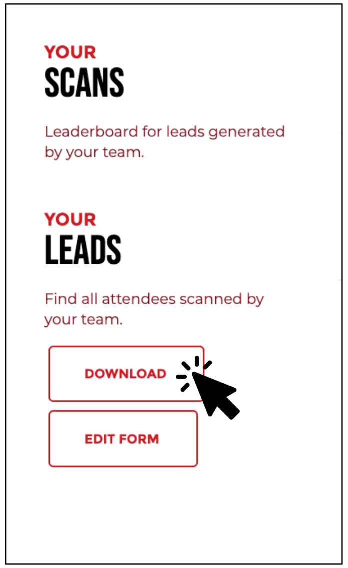
SEQU INTRO

Manage your leads



Your team's score

You can find here how many number of leads did each member of your team collect.

Download your leads

Click here to download an excel files with all the leads collected by your team.

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