User's Manual

SME Finance Virtual Marketplace

https://smeff-marketplace.globallinker.com/

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1. Marketplace Objective

The SME Finance Virtual Marketplace was created in response to the SME Finance Forum members as a way to provide them with more opportunities to connect with each other and network. The SME Finance Marketplace is an online match-making platform that allows members and other guest institutions to regularly and virtually network and explore collaboration among themselves, i.e. financial institutions, fintech, and investors, thanks to the gracious support and contribution from GlobalLinker, one of the founding members of the SME Finance Forum.

2. How does the Marketplace operate?

As a member of the SME Finance Forum, you are welcome to create your individual profile, update your institution profile, and create listings of services and products your institution would like to showcase in the marketplace. The platform will host profiles guests' institutions as well. Users of the platform will also be able to request meetings thru the platform, and participate in marketplace sessions or events, organized monthly ad hoc by the SME Finance Forum, with presentations from member institutions.

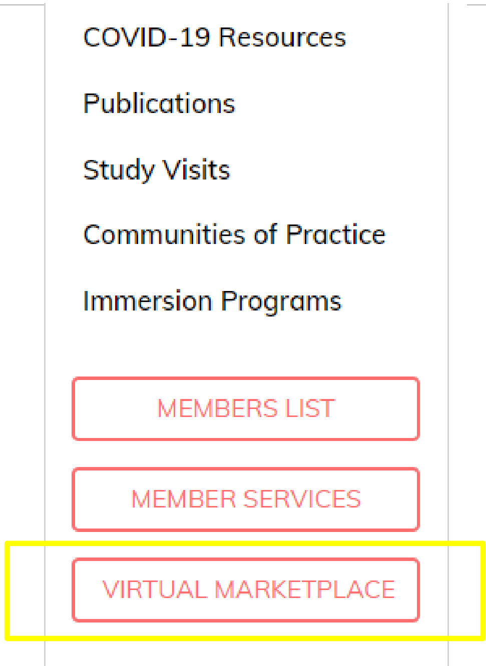
3. Marketplace Access

To log into the Marketplace, you must access the following URL from a personal computer or a mobile device (tablet or smartphone):

https://smeff-marketplace.globallinker.com/

The marketplace is intended for use of SME Finance Forum members, and industry partners. SME practitioners' non-members will create a user account by invitation only.

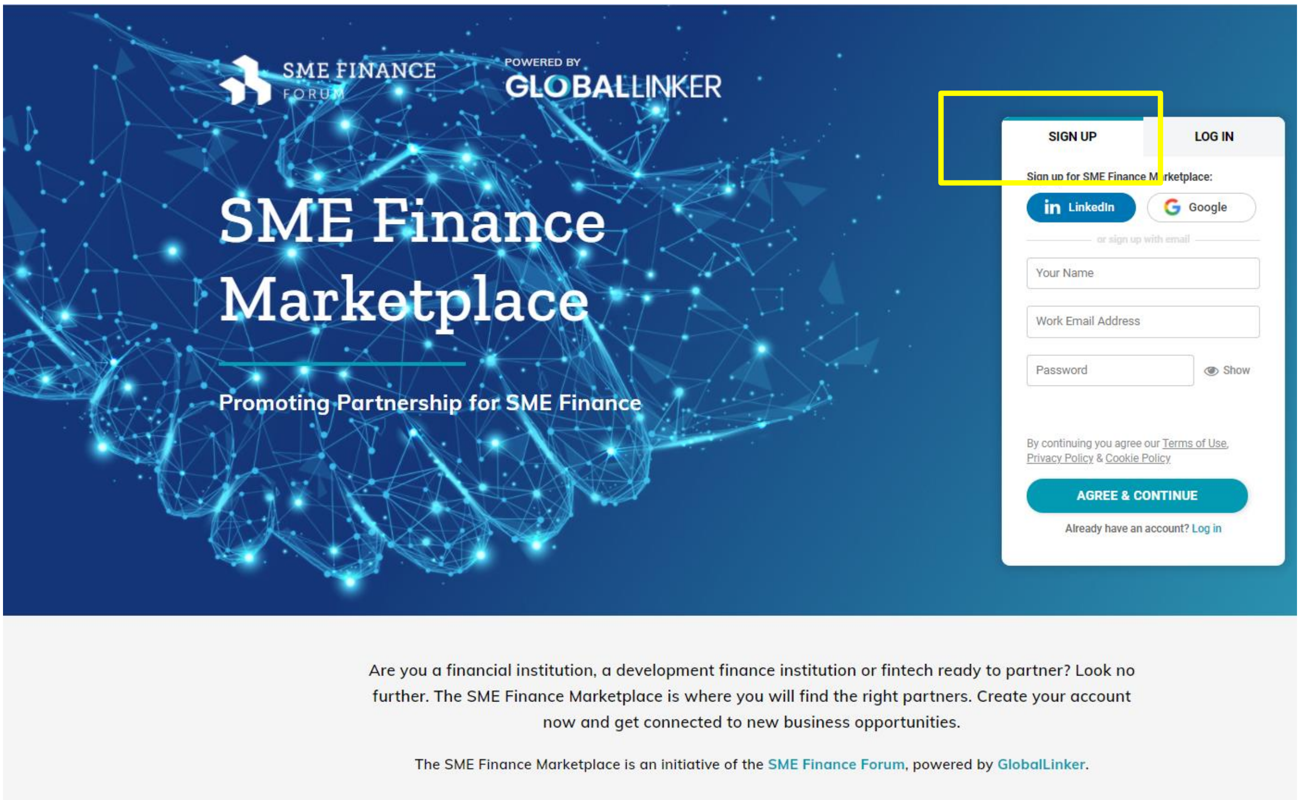
Also, if you are a member of the SME Finance Forum, you can access directly through the button on the SME Finance Forum Member Portal:



You need to be logged in to Member Portal to see this option. Log into the Member Portal with your email address here> [Member login | SME Finance Forum]

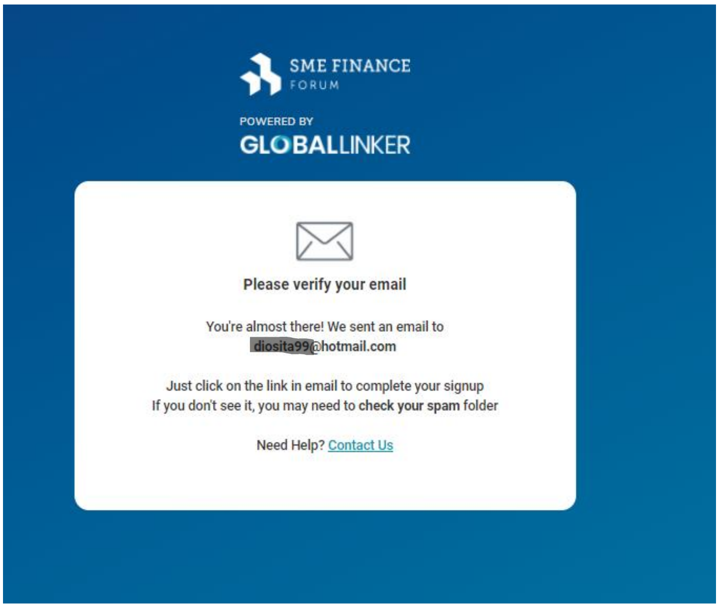
4. Sign up

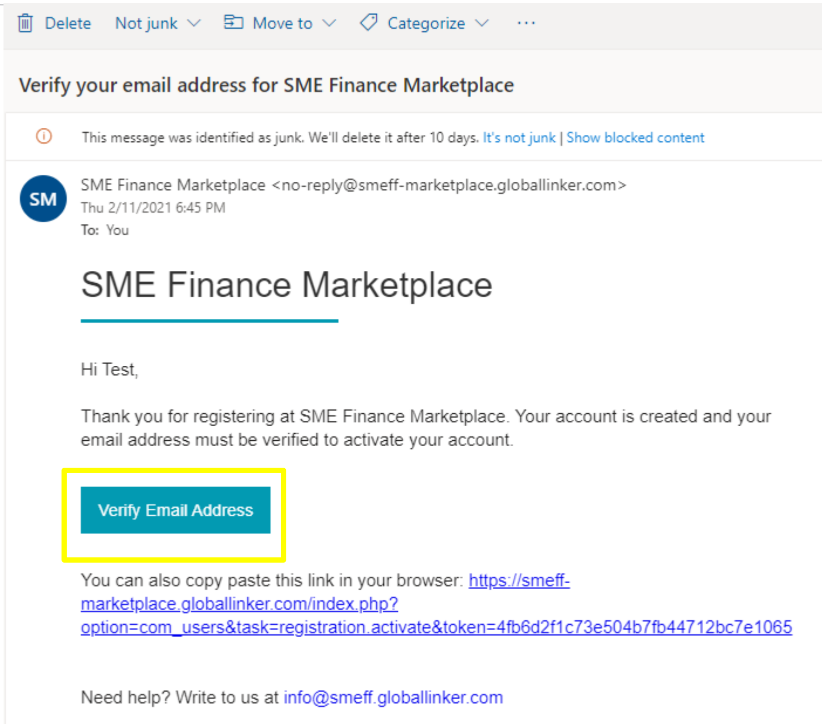
If you don't have an account on the SMEFF Marketplace, you are able to create one on the registration page (sign up), using an email and creating a password



Once done, you will see the following screen =>

You will receive a confirmation email in your inbox within a couple of seconds:

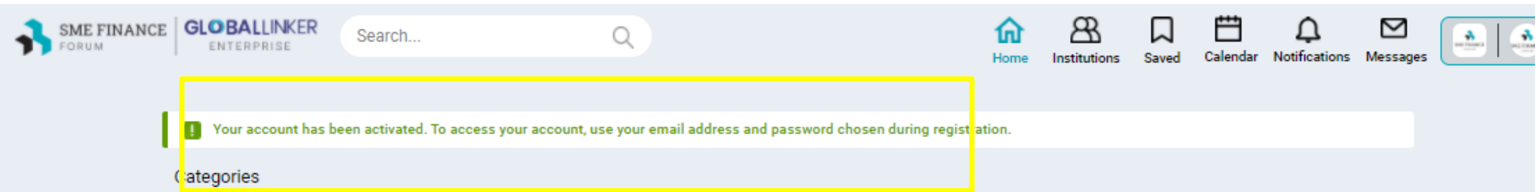




Please click on the button: "Verify Email Address", to confirm your registration.

Note: If you don't receive it immediately, please check on your Spam, Junk or Other folder.

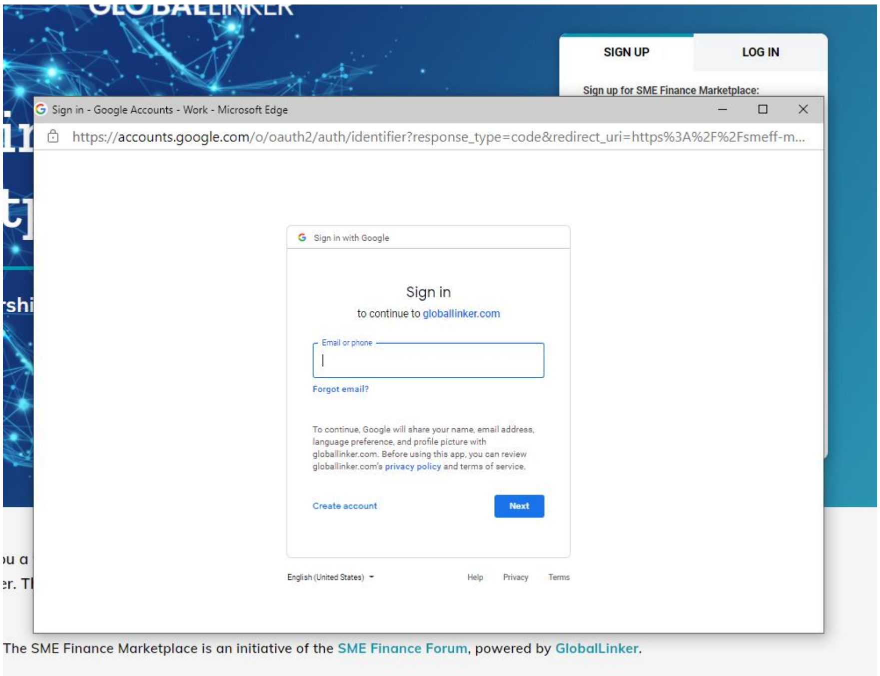
You will be redirect to the marketplace landing page to see the following message: "Your account has been activated…."



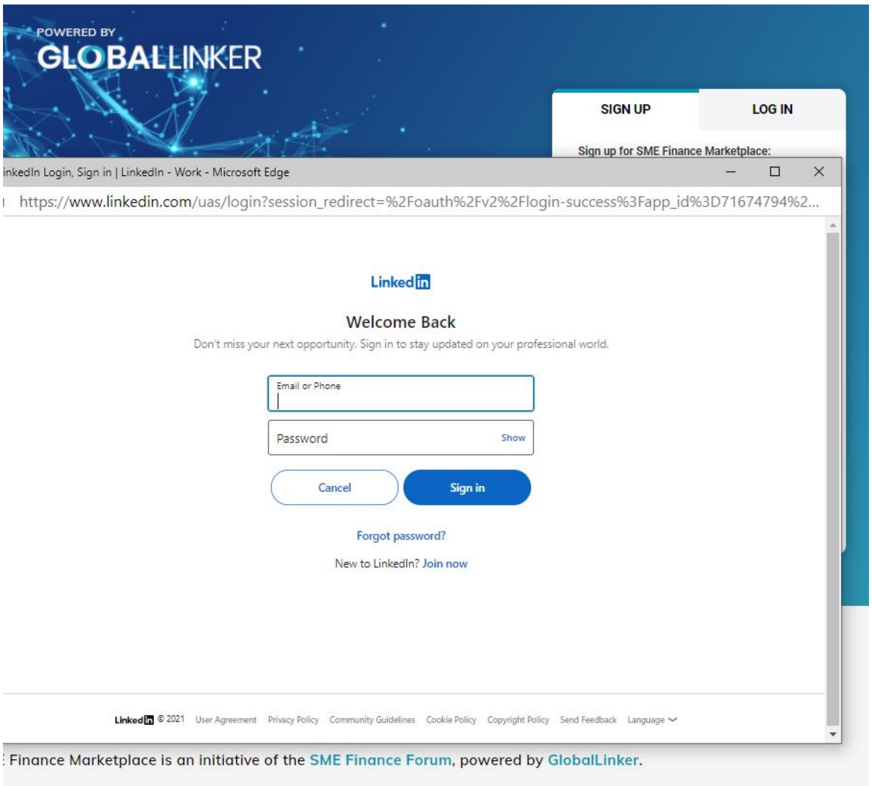
4.1. Login

Once registered, you must introduce your credentials: User id (your email address) and your password on the **login screen (tab)**

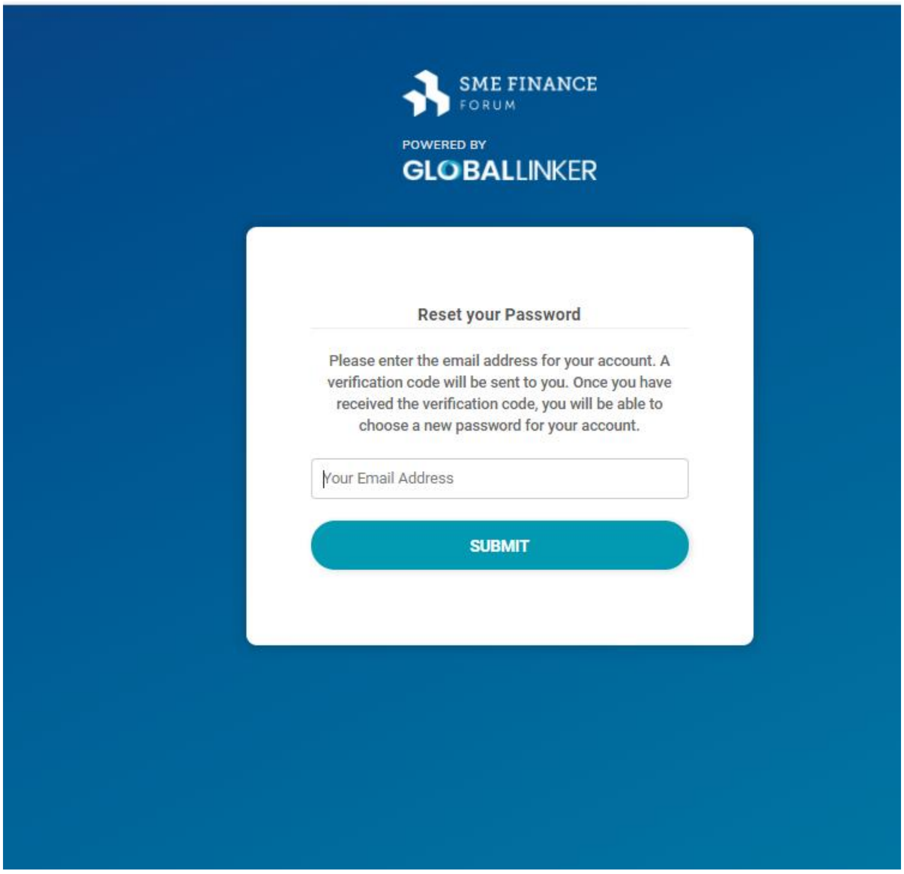
Also, you will be able to login with your Google Account credentials:



Or your LinkedIn Account credentials:

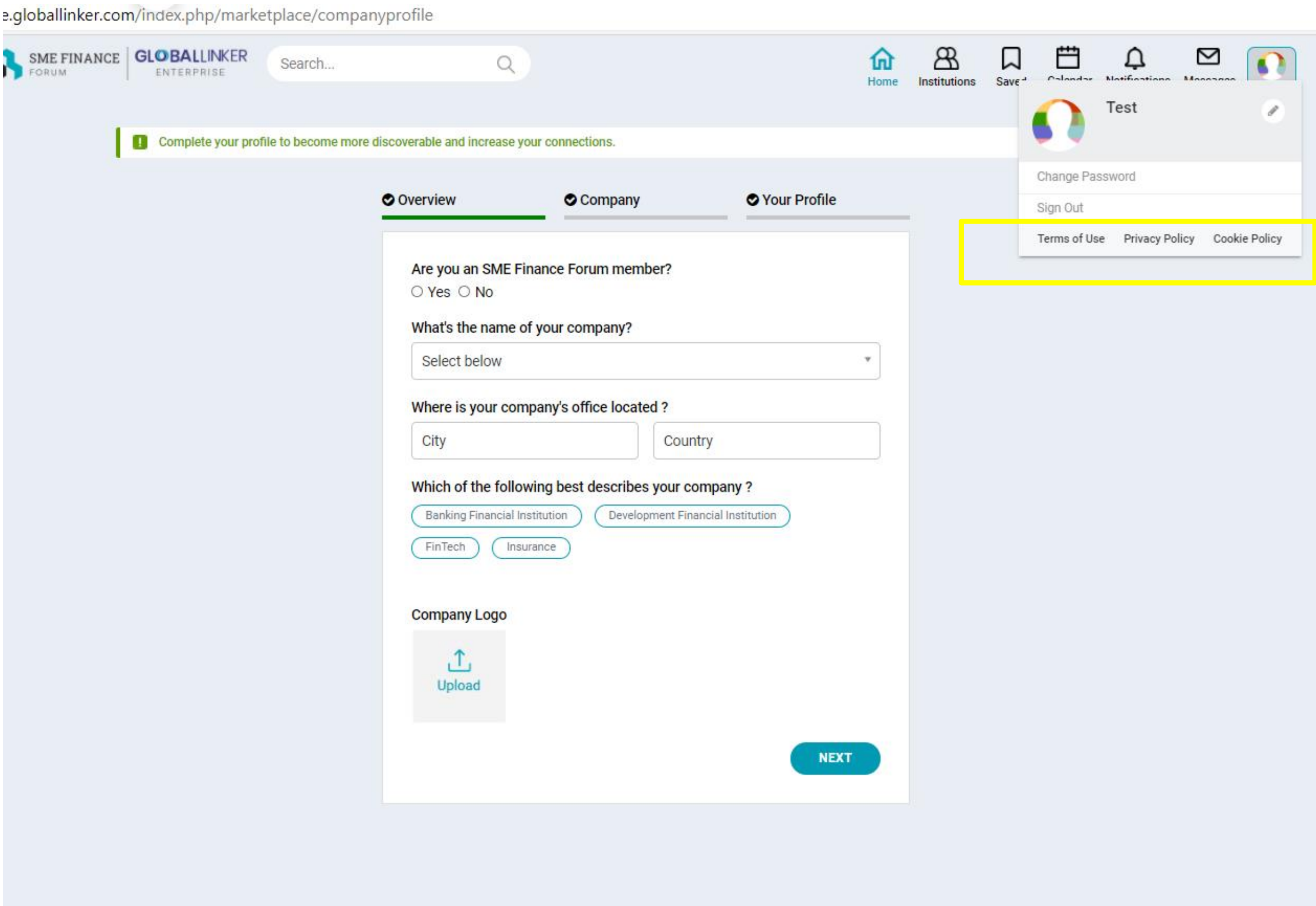


If you don't remember your password, you can request a new password using the "Forgot Password" screen, introducing your email address used at registration:



4.2. Data Privacy, Terms and Conditions, and Policy

Clicking on your profile on the top right menu, you will see three links: "Terms of Use", "Privacy Policy", and "Cookie Policy". By registering to the marketplace, you will also accept the terms and policies. Kindly click on any of them to know more.



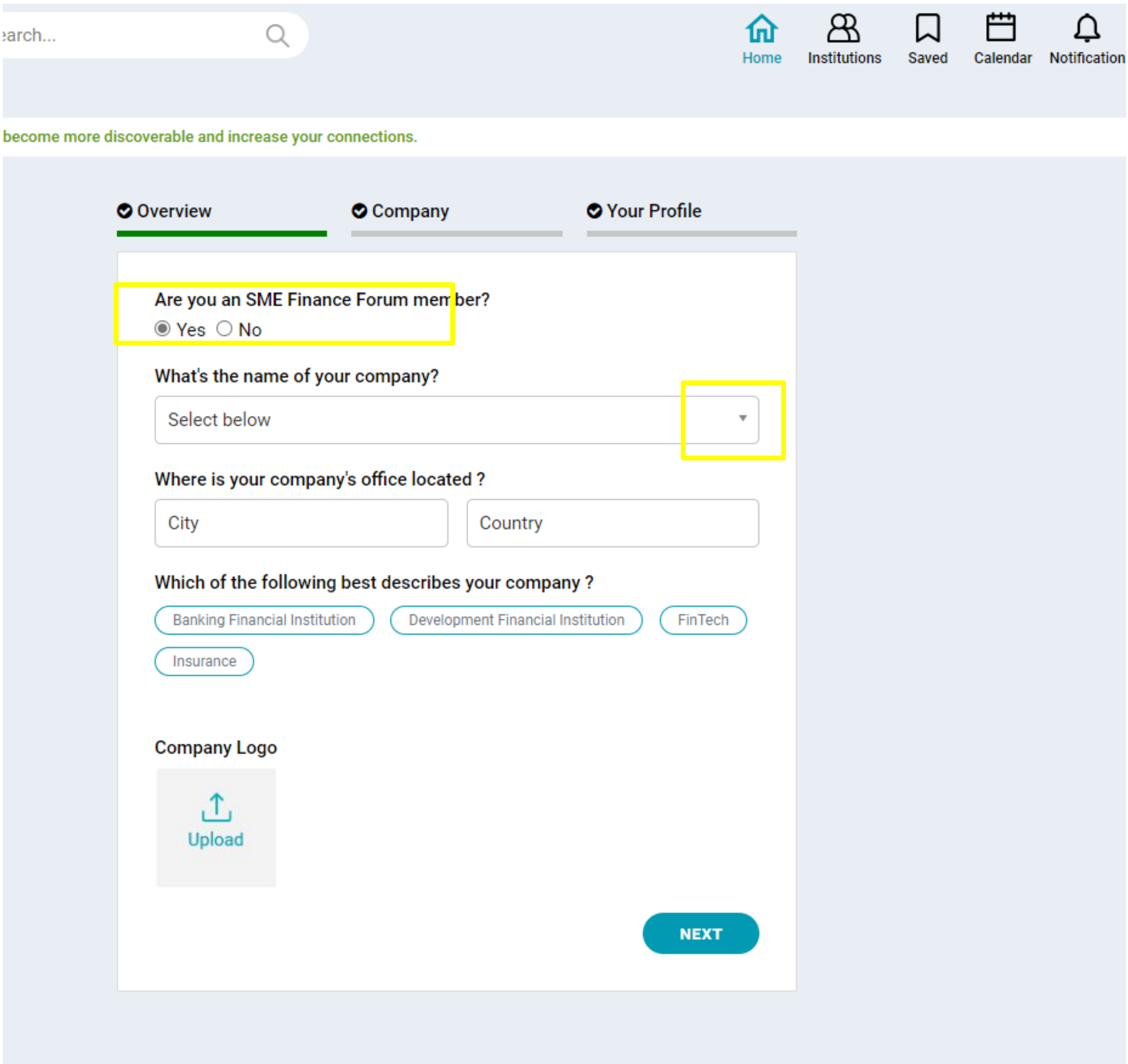
5. How to create your institution/company profile

1. The first step is to **create or select** your company profile, if it is already created.

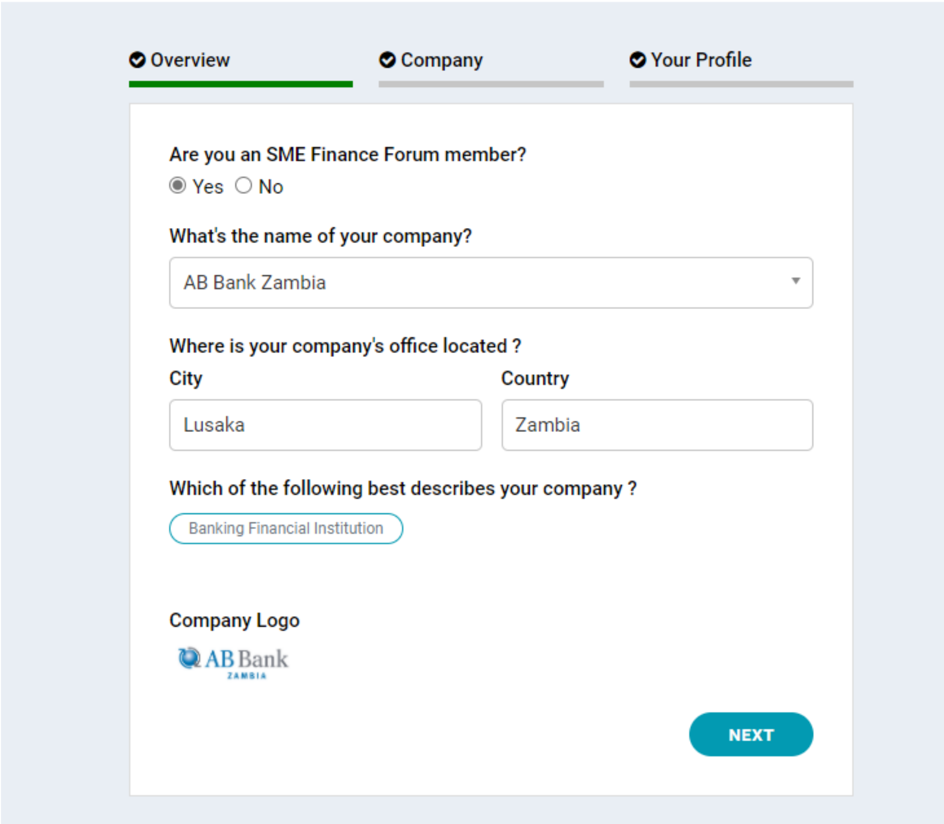
2. If your institution is a SME Finance Forum member, choose from the list on the drop-down menu "Select below)

   To check if your institution is a member, please click here:

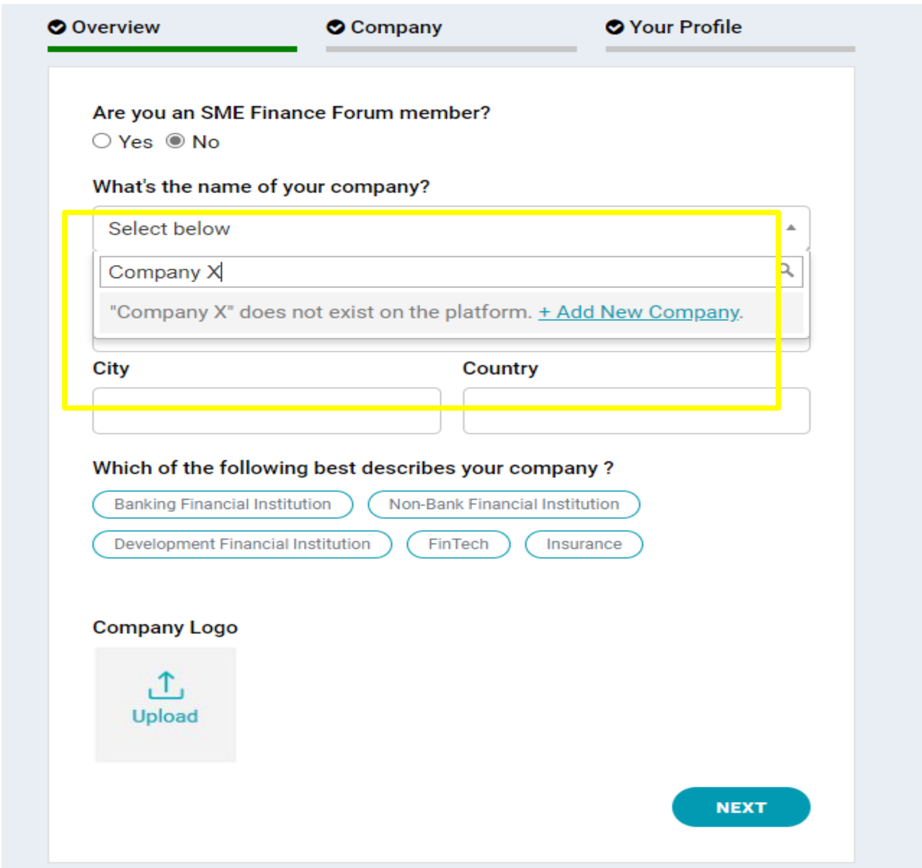
   https://www.smefinanceforum.org/members/member-list#!list



3. If the company is already created, all the fields will be pre-populated, like in the example below, then press the **NEXT** button. If fields are empty, please complete them as thoroughly as you can.



4. If the company hasn't been created, type the name of the company on the box, and click on +Add New Company, in the following screen:



5. Complete the profile adding, the location, city, and country of the company's headquarters.

6. Select the type of institutions from the options:
    a. Bank (Banking Financial Institution)
    b. NBFI (Non-Bank Financial Institution)
    c. DFI (Development Financial Institution)
    d. FinTech
    e. Insurance
    f. Other

7. Upload your company logo. Then press the **NEXT** button.

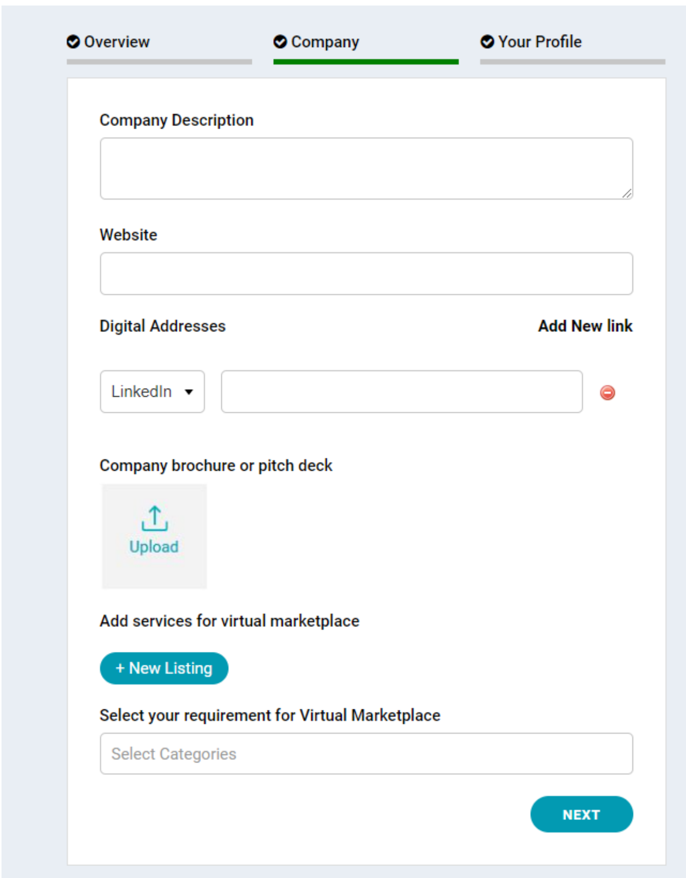
NEXT STEP

8. Complete the company description with a brief paragraph stating what your company does.

9. Add your website URL and your social media addresses.

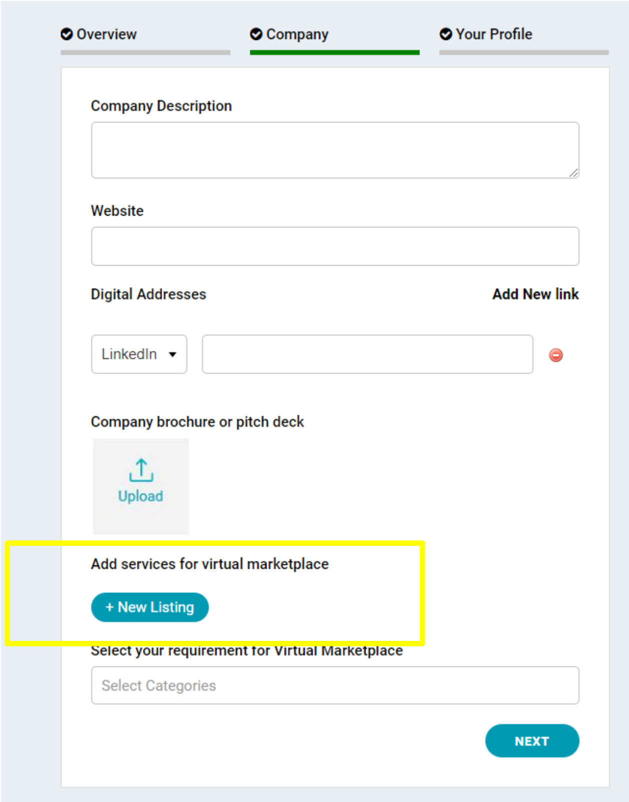
10. Upload a brochure (in PDF Format)

(see image next page)

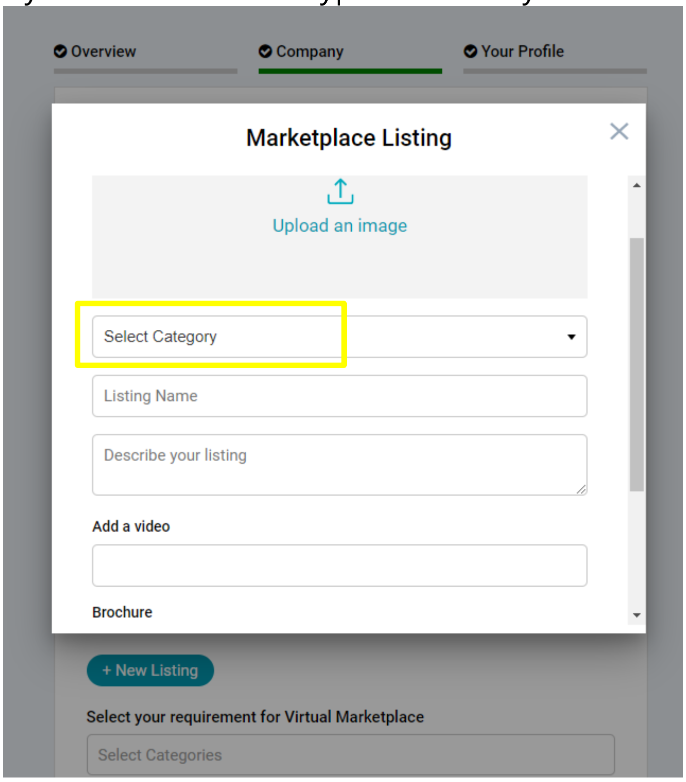


6. How to create a service or product from your company's offering

11. Click on "Add services for virtual marketplace", clicking on "+New Listing"



12. Complete the following steps as indicated in the screen below, selecting the category that best suits the type of service you want to offer.

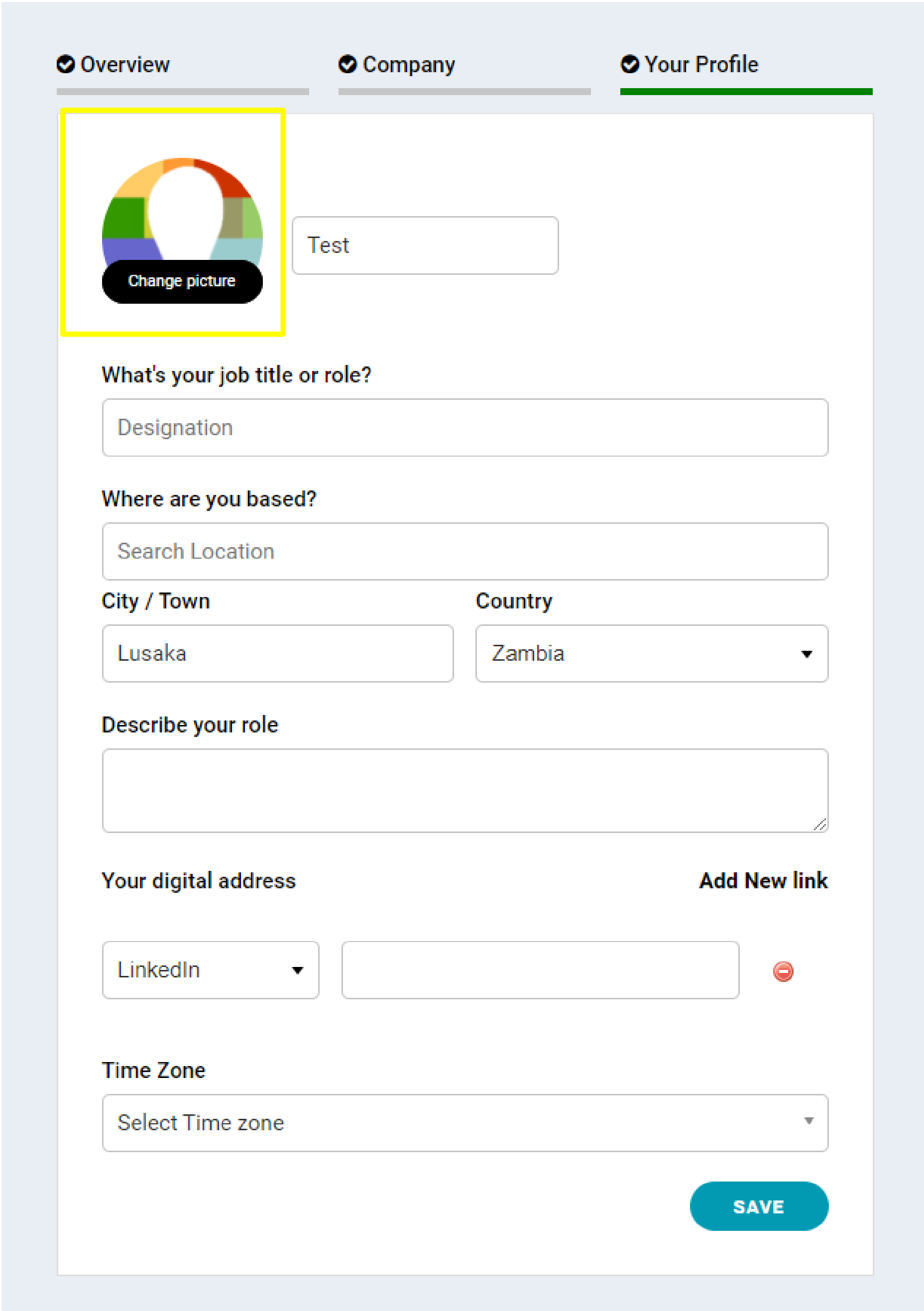


13. Once finished, continue to the next screen, clicking on the **NEXT** button.

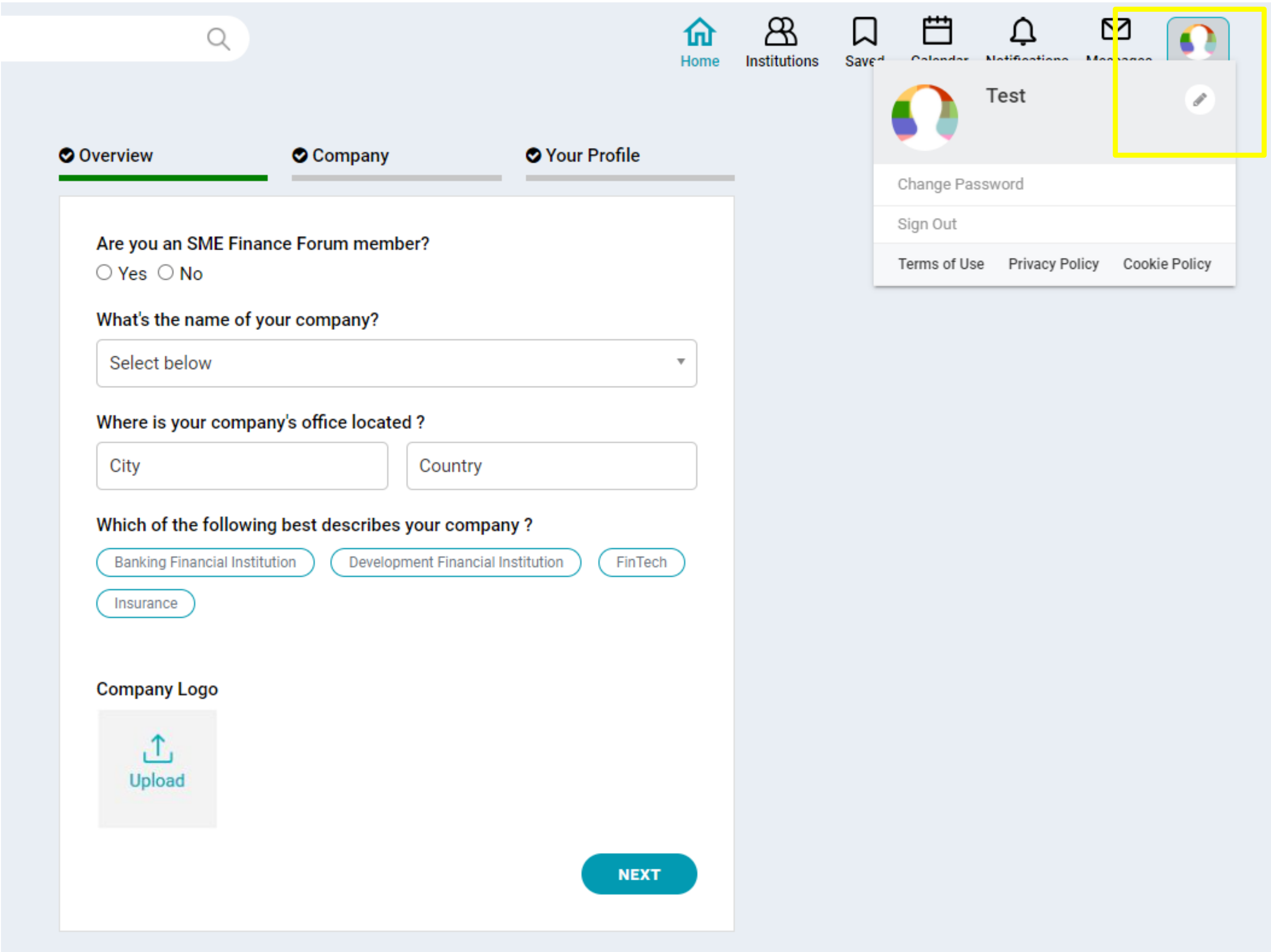
7. How to create your personal profile

14. Complete the information as shown in the image below.

15. To upload a picture, please hover the mouse on the head image, and a message to Change the picture will appear as shown below:



16. You may be able to change the information later, clicking on your profile picture, on the pencil as shown in the picture:

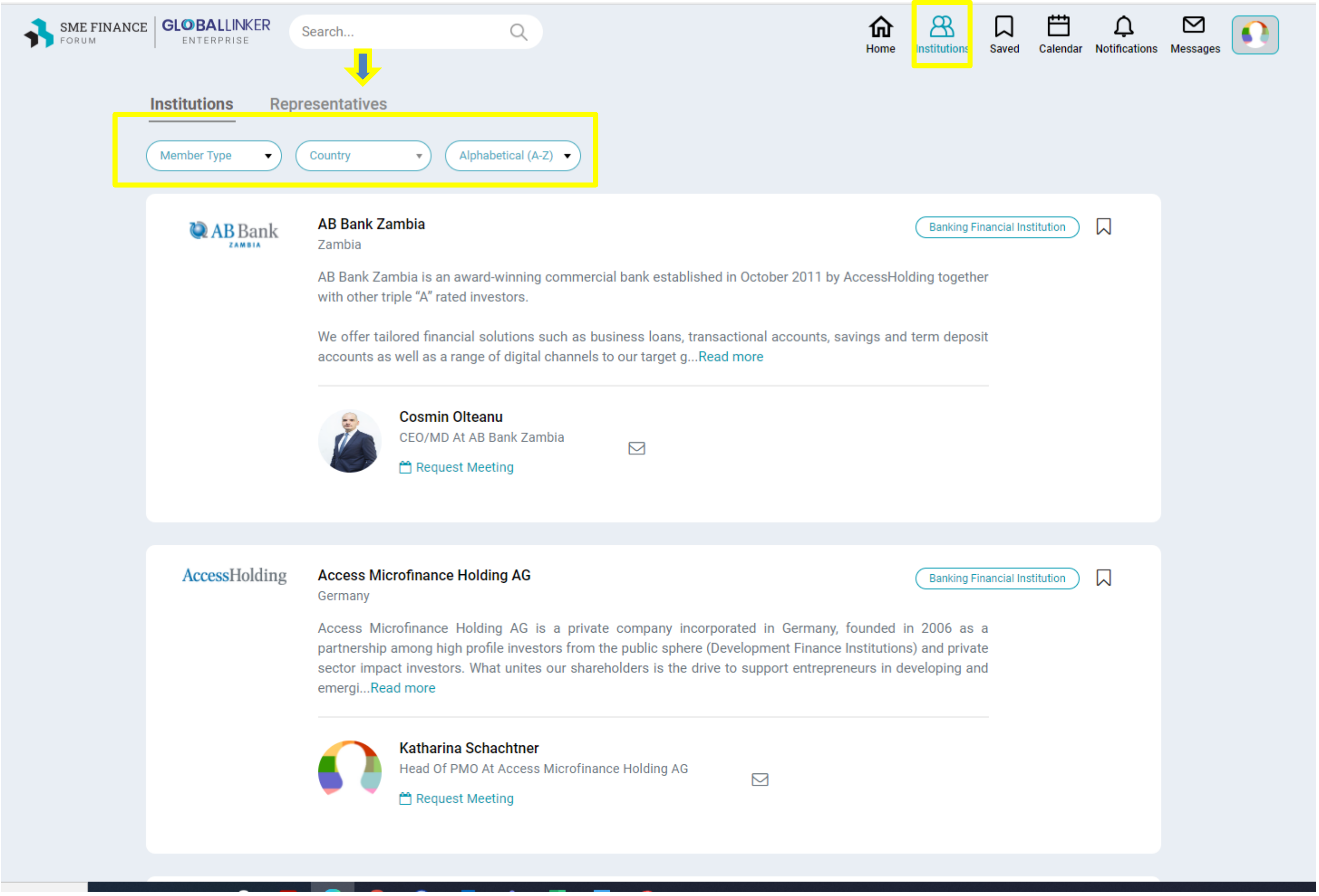

Home
Institutions
Test
Change Password
Sign Out
Terms of Use
Privacy Policy
Cookie Policy
Overview
Company
Your Profile
Are you an SME Finance Forum member?
Yes
No
What's the name of your company?
Select below
Where is your company's office located ?
City
Country
Which of the following best describes your company ?
Banking Financial Institution
Development Financial Institution
FinTech
Insurance
Company Logo
Upload
NEXT

8. How to find institutions, representatives, and offerings(listings)

17. Click on the top right menu, on "Institutions" icon. The list of registered institutions will come up in alphabetical order. A search can be done by type of member, country or search by recent on the top left menu.

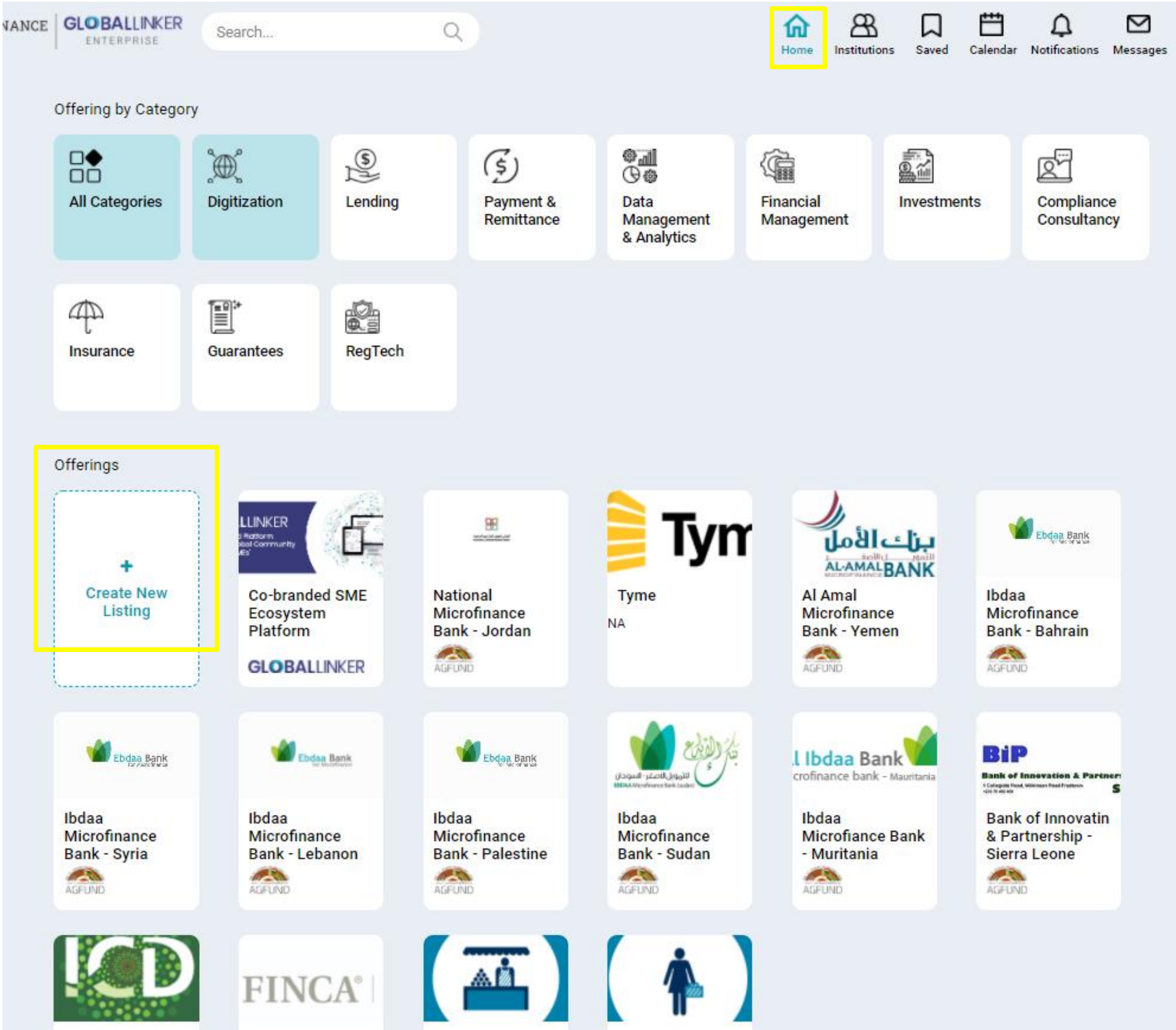
18. Click on "Representatives" tab to search for a person.

19. Click on the search field on the top left corner to search by keyword.



20. Click on the "Home" icon to see all the offerings/listings. Listings are organized by categories. Click on any category tile to see the specific offerings in that category. (See next page).

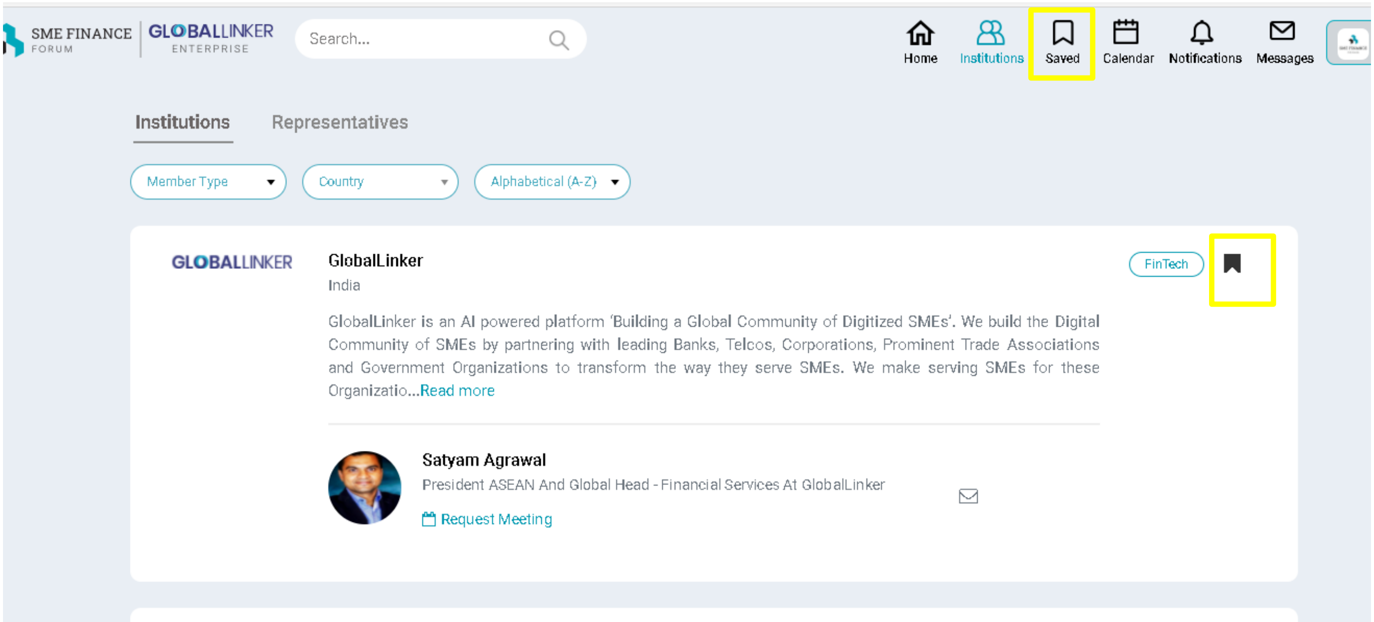
21. To create a new offering from your company while on this page, click on the tile "+Create New Listing" on the left side.



9. How to save institutions, representatives, and offerings (listings) to your profile

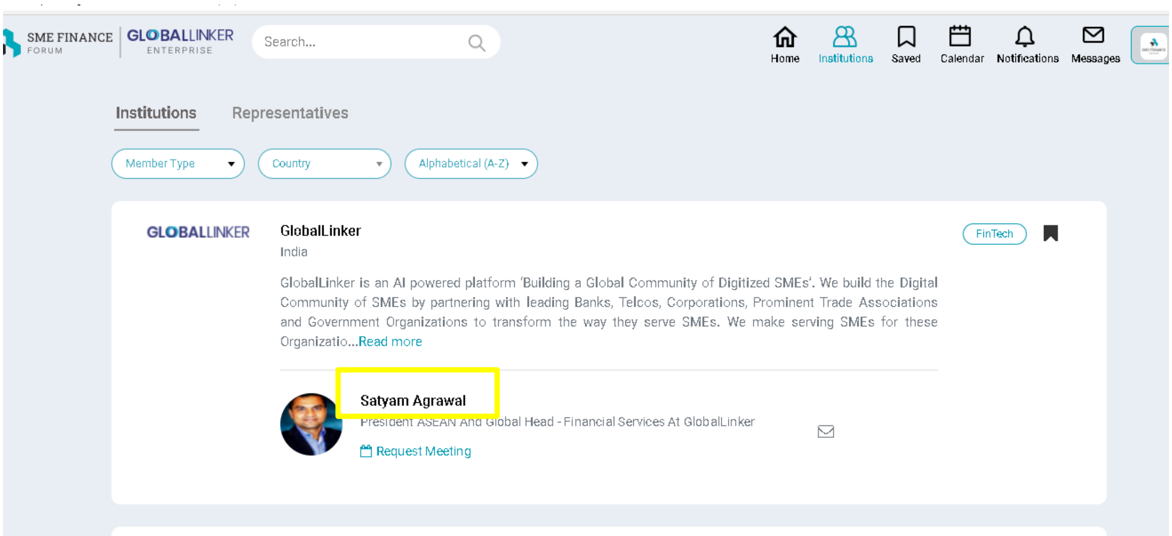
22. Click on the top right corner on the ribbon icon to save an institution, representative or listing.

23. Click on the top right menu, on "Saved" to see the saved profiles.

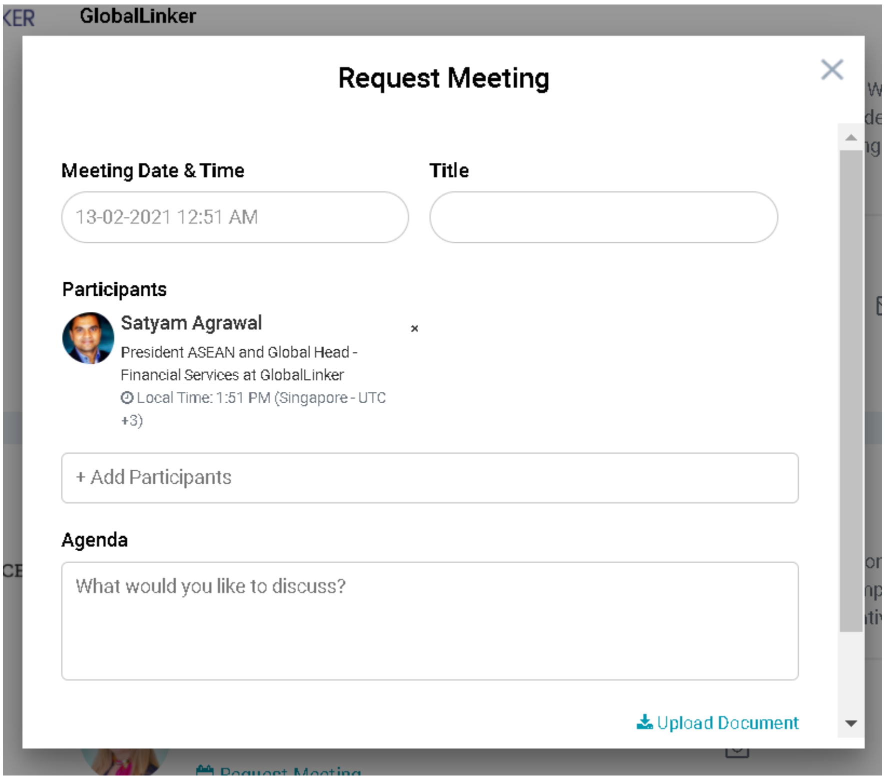


10. How to request a meeting

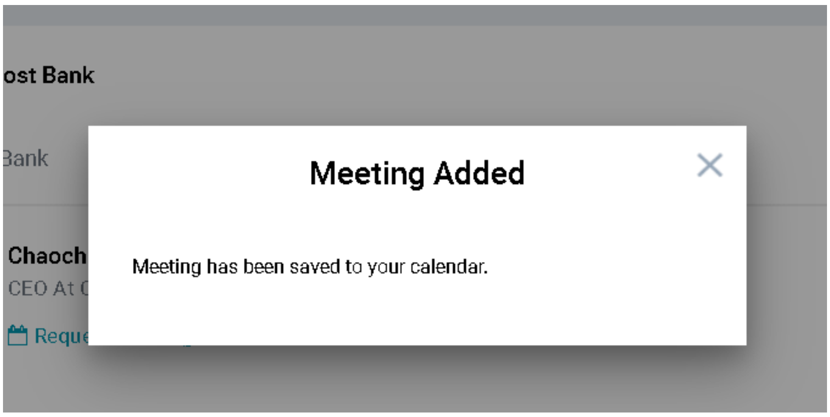
24. There are two ways to request a meeting. Go to the company profile, and on the contact associated with the company, click on "Request a Meeting".



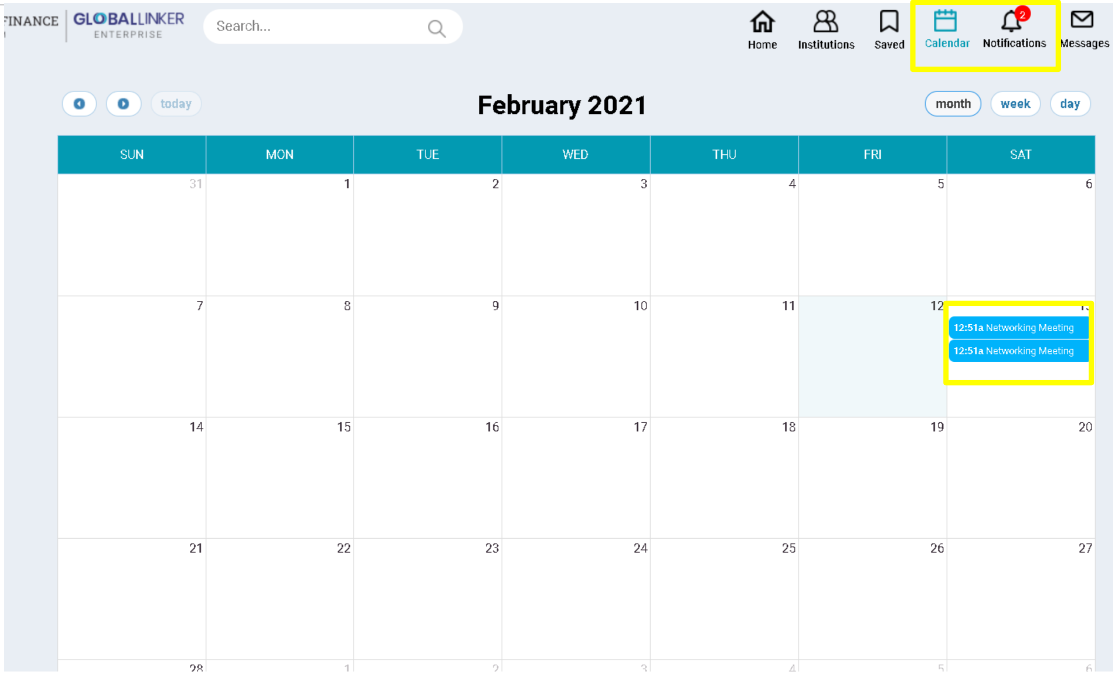
25. A popup window will open. Please complete the fields selecting date and time and the reason of the meeting on the title field. More participants already registered to the platform can be added in "+Add participants" field. As part of the meeting invitation a document can be uploaded and the link to meeting using the videoconferencing tool of your choice. Then, click on button "Request Meeting."

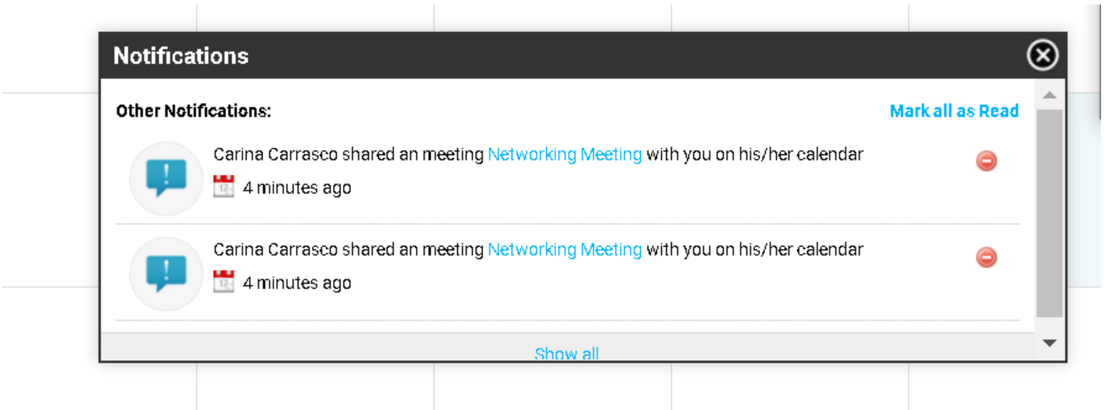


26. Once you requested a meeting, a pop-up window will show that the meeting was added to your calendar.

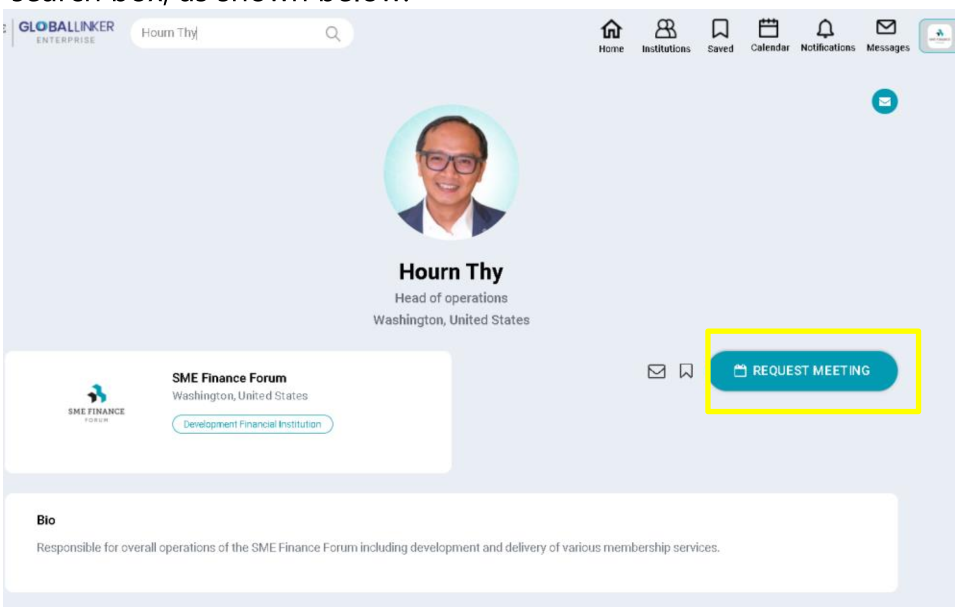


27. On your calendar. you will see the meeting requested, as shown in the next image. The meeting request will appear on the "Notifications" icon as well.

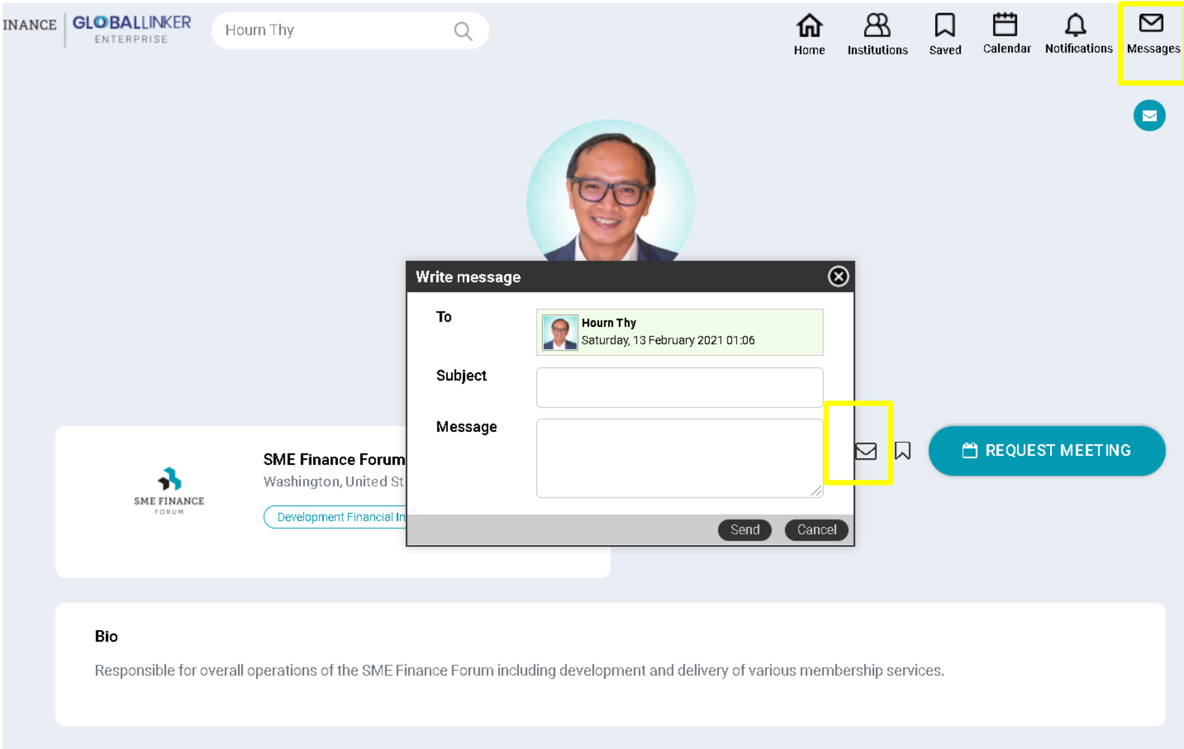




28. The second option is to search with the name of the person on the search box, as shown below.



29. A representative can be contacted by sending a message on his/her profile by clicking on the message icon below. A popup window will open to send a message. Messages received will appear on the top right menu.



For any questions or problems, please contact us at
smefinanceforum@ifc.org