

**.MONEY**  
**20/20**  
AN ASCENTIAL COMPANY

**MONEY 20/20**  
**CONNECT**  
**STEP-BY-STEP**  
**GUIDE**



# **MONEY20/20** **CONNECT**

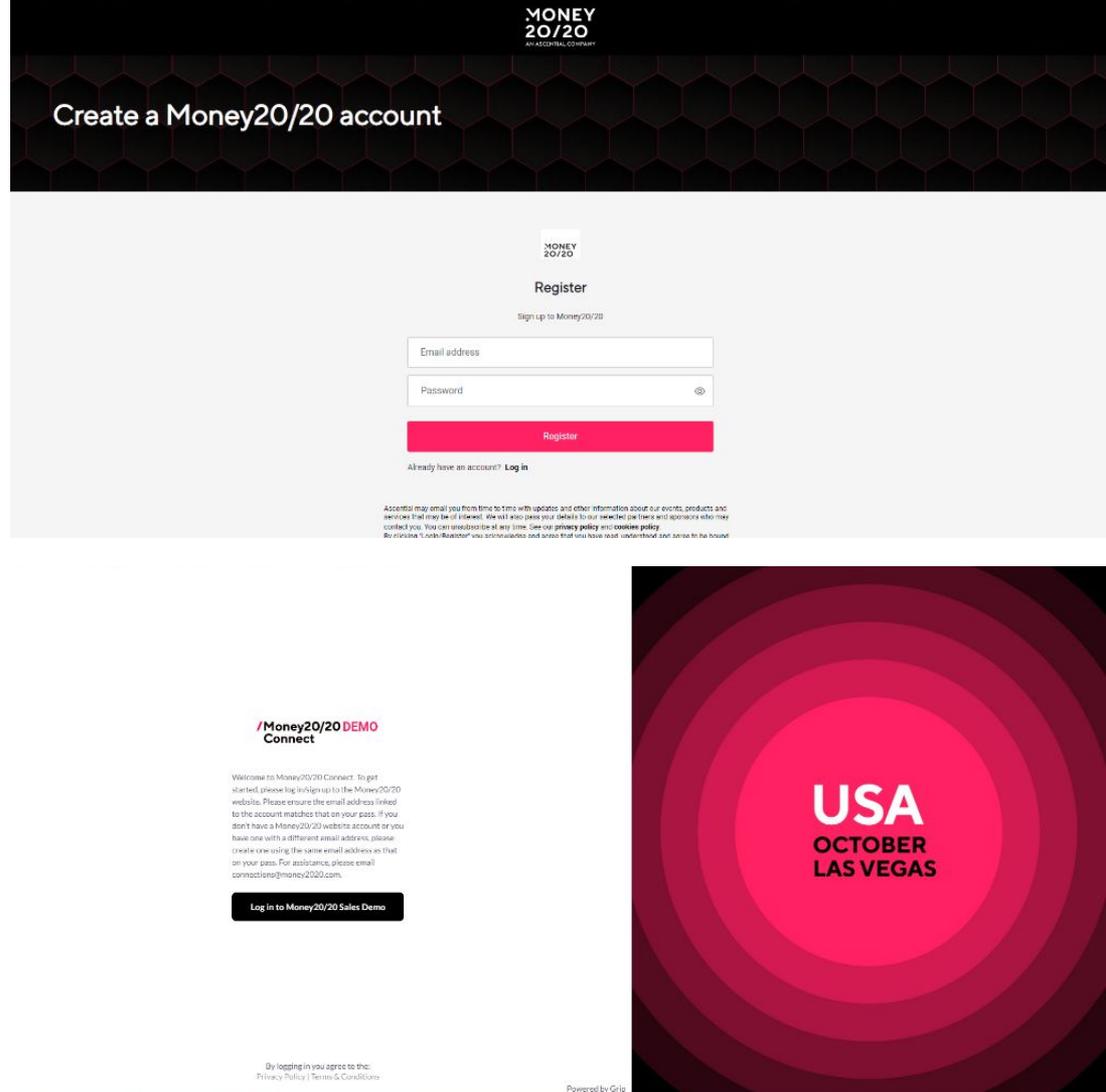
## **STEP-BY-STEP GUIDE**

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# 1. GETTING STARTED

To log in to the Money20/20 Connect Platform you will need to register your account via the “account” section on the Money20/20 USA website which can be found in the top right hand corner. These credentials which will grant you access to Money20/20 Connect.

Please ensure that the email used to sign up to the Money20/20 Connect Platform via the Money20/20 website account is the same as the one used to register your pass. This is likely to be your work email address but you can check with whoever registered your pass to make sure.



## 2. PROFILE SETUP

Once logged in you will be prompted to confirm the visibility of your contact details. This will allow you to make your details private or visible for connections to see. You can always adjust this in “Edit Profile” later if you change your mind.

You can make changes to your profile in the Update Profile tab such as Company name, adding a bio or changing your job role. Please make sure that networking is enabled to benefit from our networking features. Without this turned on you won't be able to see the attendee list, message or schedule meetings. Remember to select submit at the end of the page to save changes and allow some time for these changes to reflect.

### Edit your profile

#### Manage your photo:



For security purposes and to ensure you can move easily around the venue, please make sure you upload a recent photo. This should be a passport style photo of only yourself in front of a blank background. The photo needs to be a minimum of 480x600 pixels in size.

 [UPLOAD A NEW PHOTO](#)

#### Manage your visibility in the app:

You are currently visible in the delegate list and can network - uncheck the following box and save to hide yourself

Networking Enabled (Meetings, delegate list and messages)

**Top Tip:** Networking needs to be enabled to benefit from our other networking features. Without this turned on you won't be able to see the attendee list, message or schedule meetings and other attendees won't be able to see you.

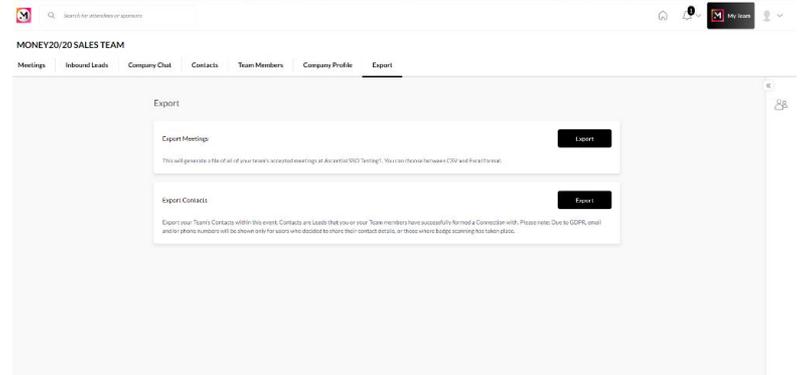
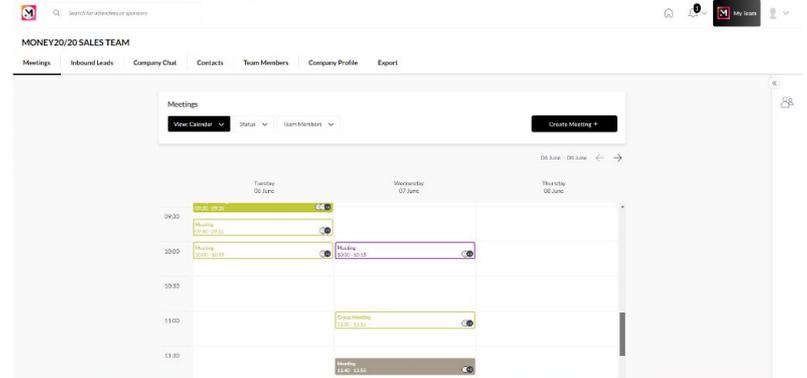
### 3. MY TEAM (SPONSORS ONLY)

“My Team” is a very helpful and important function for you and your colleagues. We advise you to set this up right after checking your personal profile.

To set up your team click on “My Team” in the top right hand corner. The first member of your team to set up the “My Team” Function and will become the admin however this can be changed at a later time by clicking the “team members” tab. If you are not the first you may come across a prompt to request to join a team.

The team's area will give you oversight over your colleagues' and also download lead data of any formed connections (however you will need to be an admin to do so).

It also allows you to respond to messages sent to your company and browse the connection you have all made. It is paramount you do this before Money20/20 takes place so you can start making those valuable connections as soon as you step on site!



**Top Tip:** You have to be an admin to download lead notes however you can have multiple admins to help out if this fails to the responsibility of more than one person.

## 4. EXPLORE ATTENDEE AND SPONSOR LIST

Via the sidebar you will be able to access the full attendee list. Filter via job title, region, sector and more to find the people you want to meet with.

You can also navigate the speaker and sponsor list in similar fashion.

**Top Tip:** Use the search bar at the top to search attendees or sponsors by name. There is also filter included in the results page.

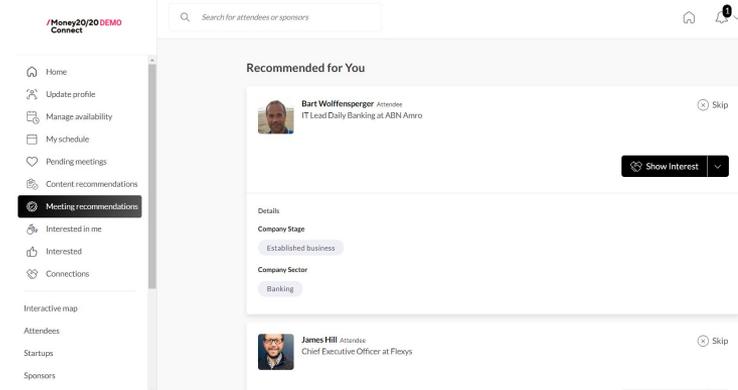
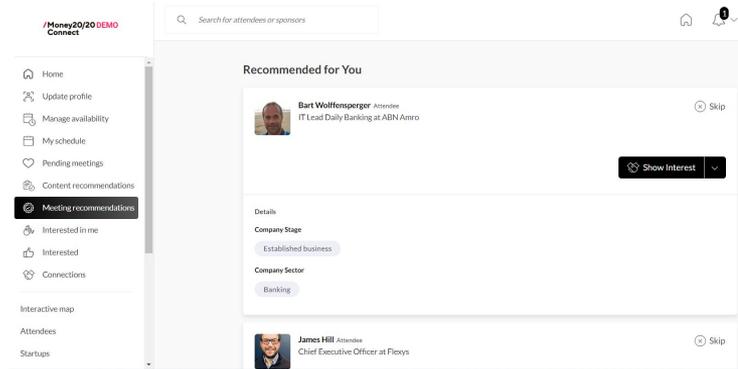
The image displays two screenshots of the Money20/20 Connect interface. The top screenshot shows the 'Sponsors' section, with a search bar at the top and a sidebar on the left. The main content area displays a grid of sponsor cards for 'adyen', 'amdocs', 'Ascenda', and 'Au10ix'. A red arrow points from the 'Sponsors' option in the sidebar to the main content area. The bottom screenshot shows the 'Attendees' section, with a search bar at the top and a sidebar on the left. The main content area displays a list of attendee cards for 'Amir Aftab' and 'Amir Ibrahim'. A red arrow points from the 'Attendees' option in the sidebar to the main content area. Both screenshots include a sidebar with navigation options such as 'Manage availability', 'My schedule', 'Pending meetings', 'Content recommendations', 'Meeting recommendations', 'Interested in me', 'Interested', 'Connections', 'Attendees', 'Startups', 'Speakers', 'Agenda', and 'Questions!'. The 'Attendees' section also includes filters for 'Sort: Name', 'Company Name', 'Status', 'Area of Interest', and 'Company Sector'.

## 5. SHOW INTEREST OR SKIP PROFILES

In order to get the most out of the connections platform, we need to know who you do and don't want to connect and meet with.

Show Interest to those you wish to connect and meet with. Skip Profiles of those who are not the type of attendees you wish to meet with.

This information added with your pre-set preferences, will be used to match you for meetings. There is no guarantee that the attendees you show interest to will be the ones you meet with, but their profile information will feed into the AI and be used to ensure you meet with a similar type of attendee.



**Top tip:** The more you use the recommendations function the more the AI improves its suggestions. You can also show interest and message Sponsors.

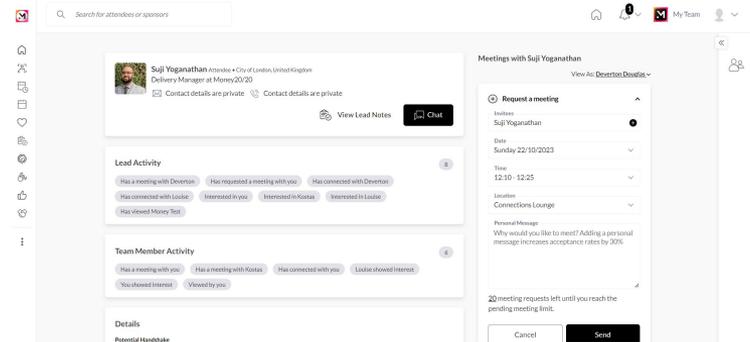
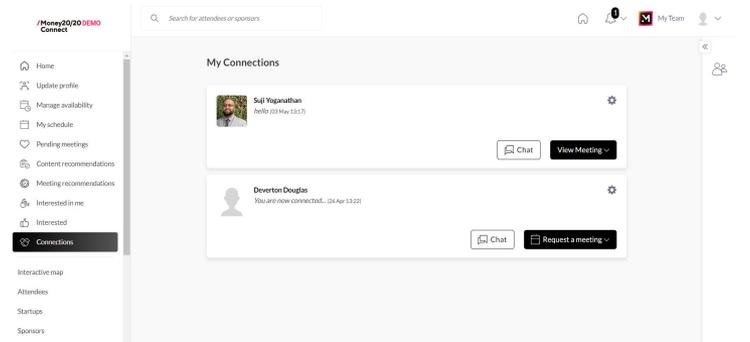
## 6. ARRANGING MEETINGS WITH CONNECTIONS

“My Connections” is where your connections will show once either you or your newfound connections has accepted a request.

You can click on “My Connections” for a more in depth breakdown and arrange meetings with new connections to further conversations

You can select a meeting location at your stand or in the connections lounge which is our dedicated networking area. A table number will be supplied when both parties have accepted.

You can add multiple attendees to the meeting by clicking the “+” symbol next to the initial attendee.



**Top Tip:** When requesting a meeting, it is advised that you become a connection first. Also it doesn't hurt to send a welcoming “personal message” with the meeting request. This increases your chance of a connection being made.

## 6A. SCORE LEADS AND ADD NOTES TO THEIR PROFILE

Add lead notes to newly formed connections and avoid forgetting vital information. This can be accessed any time you select “View Lead Notes” on a connections profile.

You can also score leads from 1 to 5 to aid your organisation of connections post event.

Sponsors of Money20/20 will be able to download information on contacts and meeting which will be accompanied by lead notes and lead scores.

You can also mention a team member within the lead notes and detail how they played a part in forming a connection or highlight who needs to manage this relationship during or post event.

The image displays two screenshots of a lead profile interface. The top screenshot shows a lead named Suji Yoganathan with a lead score of 5/5. The 'Notes' section contains the text 'Priority to reconnect post show'. Below the notes, there are three activity entries from 'Deverton Douglas' dated 'Apr 20, 2023', each stating 'Changed the lead score from 1 to 5'. The bottom screenshot shows the same lead profile with a lead score of 5/5. The 'Notes' section contains the text '@Kostas Zachoudanis had a great meeting with prospect on Wednesday@'. Below the notes, there are three activity entries from 'Deverton Douglas' dated 'Apr 20, 2023', each stating 'Changed the lead score from 1 to 5'. The interface includes a search bar at the top, a 'Show Interest' button, a 'Chat' button, and a 'Skip' button. The lead's name and role are displayed at the top, and the 'Notes' section has a 'Save' button.

## 7. EVENT AGENDA

The event agenda holds all the content sessions giving you a breakdown of days, times and information about each session including speakers, themes and stage location. You can use the filters to sort out the location or interest.

If something piques your interest you can select to add it to **"My Schedule"** which will slot in to your personal calendar.

You can also select an event to get further information and context on the session as well as similar session suggestions.

**Top Tip:** Make sure to check out the **Fringe Event Agenda** so you don't miss out on the sponsor led events on the show floor!

Money20/20 DEMO Connect

Search for attendees or sponsors

My Team

### Event Agenda

Dates Tracks Stage Tags Search

Tuesday 06 Jul

09:30 - 10:35

Money20/20

Fusion Stage

Test Sp Speaker

Added to schedule Rate Session

10:00 - 10:10

Money20/20 Welcome Recommended

10:00 - 10:15

Digital Currency: The Bridge To Faster, Cheaper Payments Recommended

The Horizon Stage, powered by Mastercard Unexpected finance

Added to schedule Rate Session

10:10 - 10:20

Startup Pitch: Ballerine

The Close Up Stage Thinking differently

Added to Schedule

test sponsor 12 Speaker

Session Sponsor Money Beach Club

## 8. MANAGE YOUR SCHEDULE

Within your profile you will be able to manage your availability. If there are any times you are not able to attend a meeting please block these out.

This will ensure that meetings are booked for only when you are available.

Go to “My Schedule”. In this section you will be able to keep track of the meetings that you have arranged or have been arranged for you.

You will receive an email notification when your meetings are ready to review

You will also be able to see any content sessions or show floor events you added to your schedule here so you can plan your day accordingly.

You can also sync your personal schedule to your email provider so you can organise your day within your work set up also. Please advise that the sync time vary from provider to provider.

The screenshot displays the 'My Schedule' section of the Money20/20 DEMO Connect application. On the left is a navigation sidebar with options like Home, Update profile, Manage availability, My schedule (selected), Pending meetings, Content recommendations, Meeting recommendations, Interested in me, Interested, Connections, Interactive map, Attendees, Startups, and Sponsors. The main content area shows a search bar and a 'My Schedule' card. The card has a 'Sync to my calendar' dropdown menu open, listing Google, Outlook, and Yahoo. Below this, a meeting for Tuesday 24 October is shown, with a 'Pending' status and a 'Sync to my calendar' button. The meeting details include the time 11:55 - 12:10, location 'Connections Lounge', and participants Suji Yoganathan and Deverton Douglas. Action buttons for 'Decline', 'Reschedule', 'Message Organizer', and 'Accept' are visible at the bottom of the meeting card. A red arrow points to the 'Sync to my calendar' button in the meeting card.

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**WE ALSO HAVE A HELPFUL, IN  
DEPTH DEMO VIDEO [LINKED HERE](#)**

**IF YOU EXPERIENCE ANY  
DIFFICULTIES WITH MONEY20/20  
CONNECT PLEASE CONTACT  
[CONNECTIONS@MONEY2020.COM](mailto:CONNECTIONS@MONEY2020.COM)  
FOR FURTHER ASSISTANCE**

