CFA Society Hong Kong

30 YEARS ANNIVERSARY

CFA Society Hong Kong Mobile App for Members - Easy Guide

August 2022

How to Download and Start

- Search by keyword "**CFA Society Hong Kong**" on either:

Available on the App Store

iOS App Store

GET IT ON Google Play

Android Google Play

- Install the app (size: around 9.5MB)
- Ensure you are an active user on our website: https://cfasocietyhongkong.org/
  - ☑ You have signed into your member's account previously
  - ☑ You have set the 2FA configuration after Wednesday 10 August (our last website security update)
- You are now ready to start explore the app!

1. Login

Ensure you have signed into your member's account at Society website for the first time.

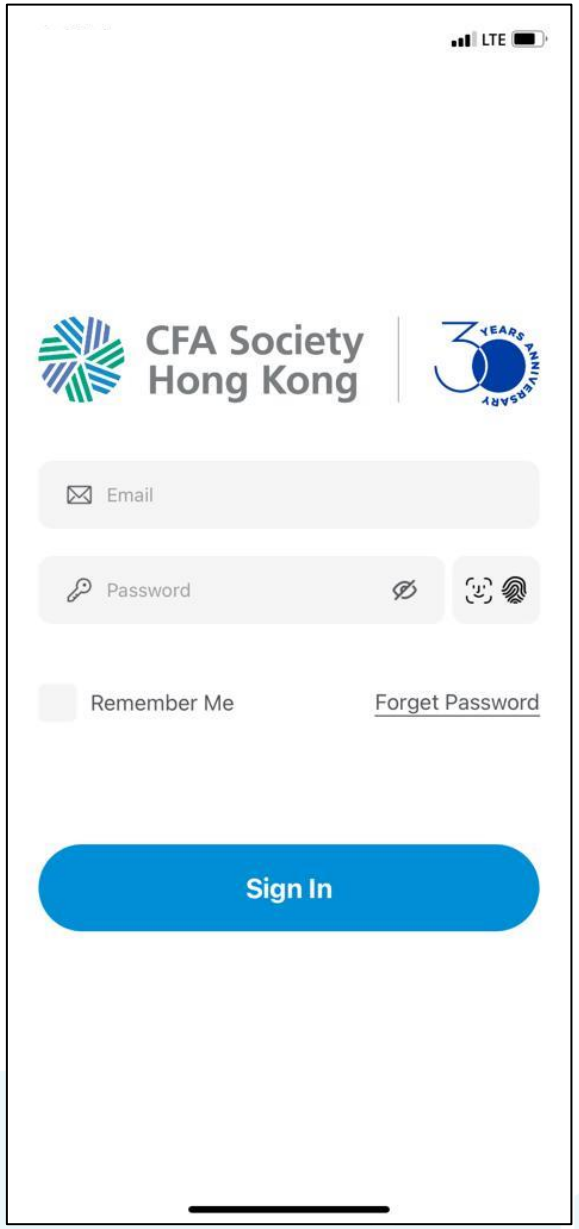
- Email: *Primary address of your membership account**

  * For CFA Institute Member, it is the email address with your CFA Institute account.

  For Associate Member / Student Associate, it is the email address used for your associate member / student associate application.

- Password: *Same password as on website*

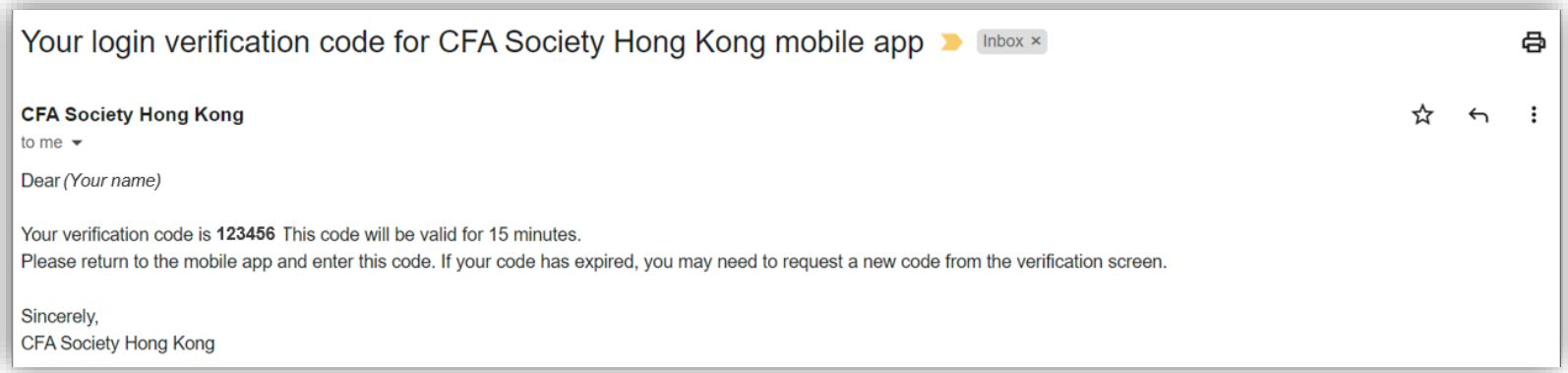
- Check "Remember Me" to instruct the app to remember your login credential. This can save time from entering the details next time.
- "Forget password" – you will be redirected to reset password on website



1. Login (cont'd)

- After entering correct email and password, a 2FA code will be sent to your inbox.

  Please check your inbox. The 2FA code is a 6-digit code.

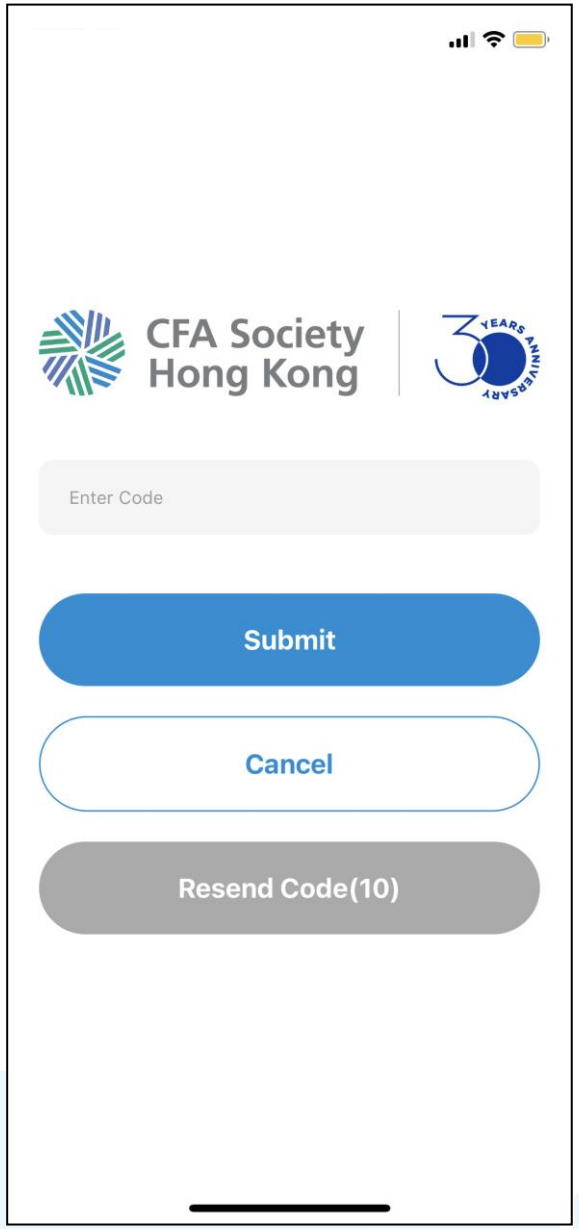

Your login verification code for CFA Society Hong Kong mobile app Inbox ×

CFA Society Hong Kong
to me

Dear *(Your name)*

Your verification code is **123456** This code will be valid for 15 minutes.
Please return to the mobile app and enter this code. If your code has expired, you may need to request a new code from the verification screen.

Sincerely,
CFA Society Hong Kong



- If you cannot receive the code, kindly also look for the email in the junk/spam folder.
- If you still cannot receive one, you may also click "Resend Code" after 60 seconds.

2. Basic features

- Pop-up message(s) after login for important news from the Society
  - Click on the image to view the details, by redirecting to a webpage
  - Swipe left/right to go to next/previous message
  - Click the "X" on right top corner to close the pop-up message(s) after viewing

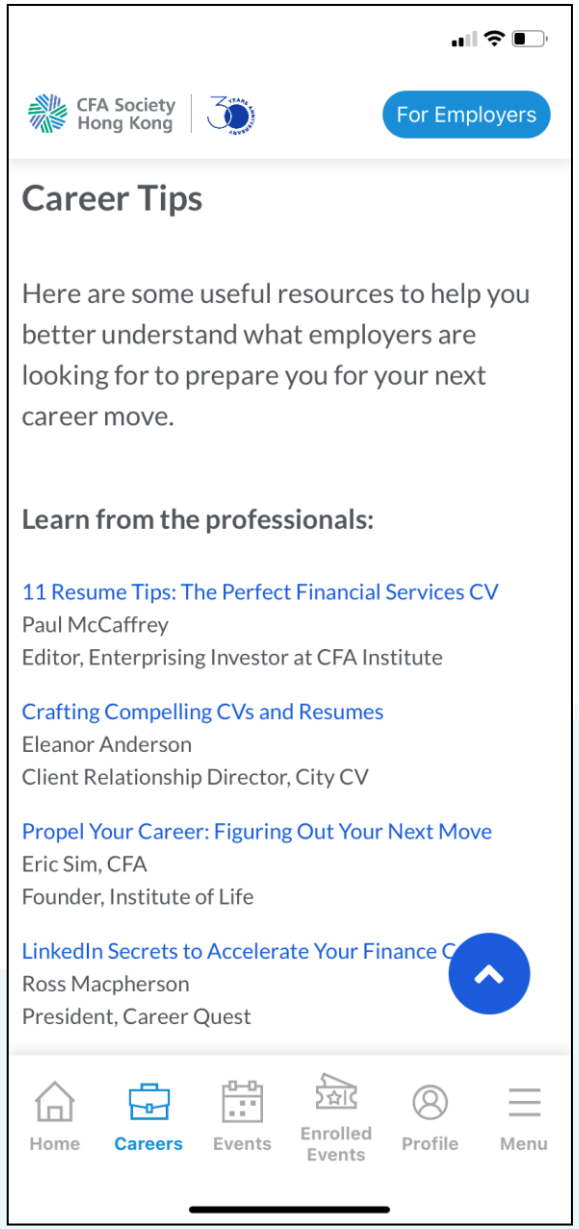
2. Basic features (cont'd)

- Click bell icon on **Home** tab's right top corner to view the pop-up message(s) again
- Click upward white arrow on blue circle to go back to the top

3. Careers

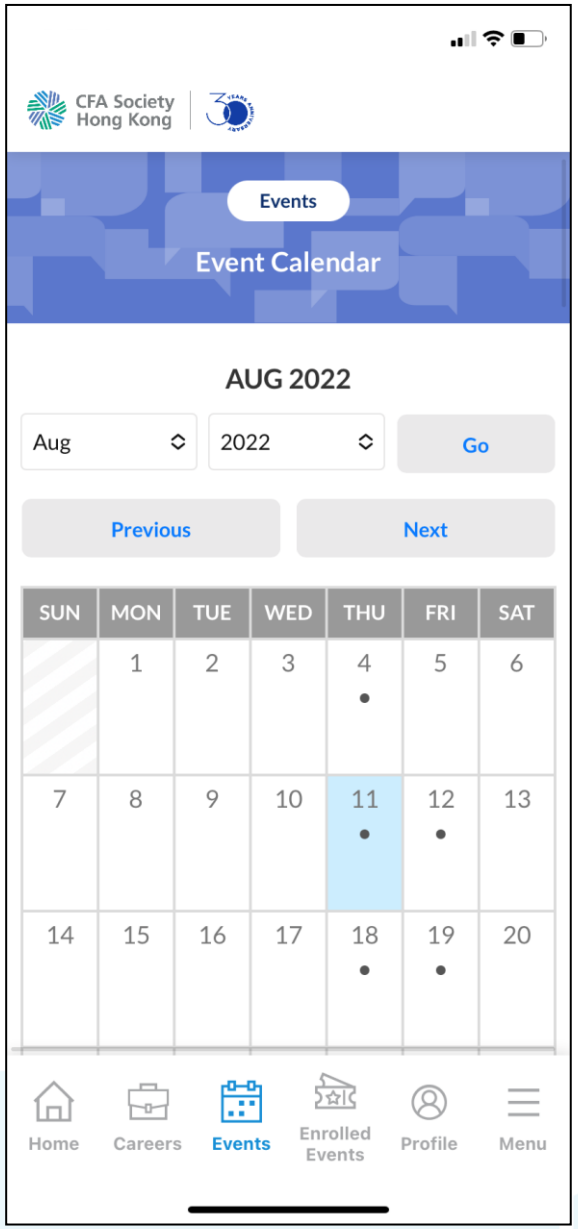
- Click on **Careers** tab, you would land on "For Job Seekers" page
- Switch between "For Employers" and "For Job Seekers" by clicking the blue button on top right corner

For Employers / For Job Seekers



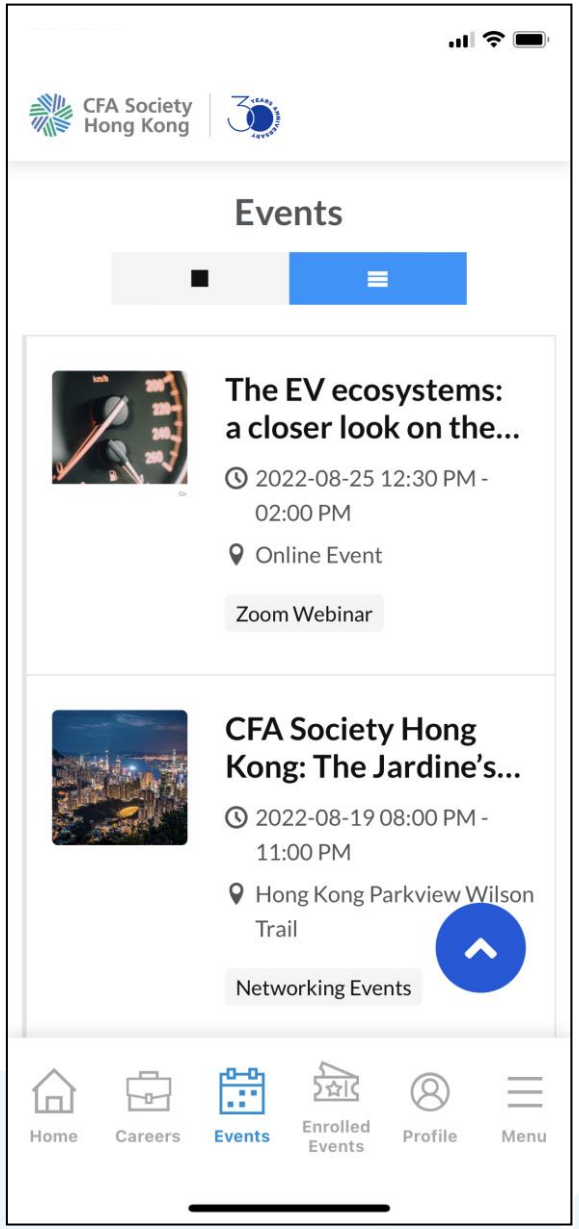
4. Event Enrolment

- Click on **Events** tab
- An event calendar would show. You can search the events by:
  - Month and Year
  - Keywords
  - Location
  - Date Range
  - Category
  - Event type



4. Event Enrolment (cont'd)

- The enrolment steps are same as currently on website:
  - Click on the event you are interested
  - Event details will be displayed
  - Choose the ticket you prefer and proceed checkout
  - Fill in the details to complete the enrolment
- After successful enrolment, you would see the event added to **Enrolled Events 〉 Upcoming**
- You will also receive a confirmation email of the registration.



5. Enrolment record

- Click on **Enrolled Events** tab
  - **Upcoming** - Enrolled future events
  - **History** - Enrolled past events with attendance status, and CPT certificate if applicable
- Attendance status in different coloured labels will be shown on each enrolled event, accordingly to the actual attendance. Attendance status include:

  Registered

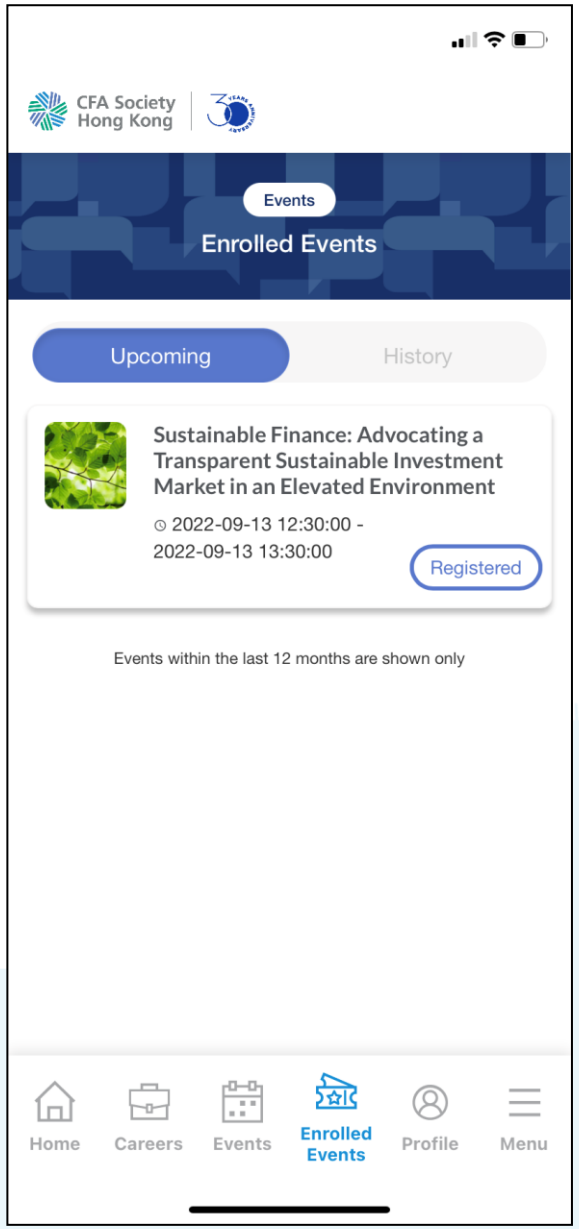
  Attended

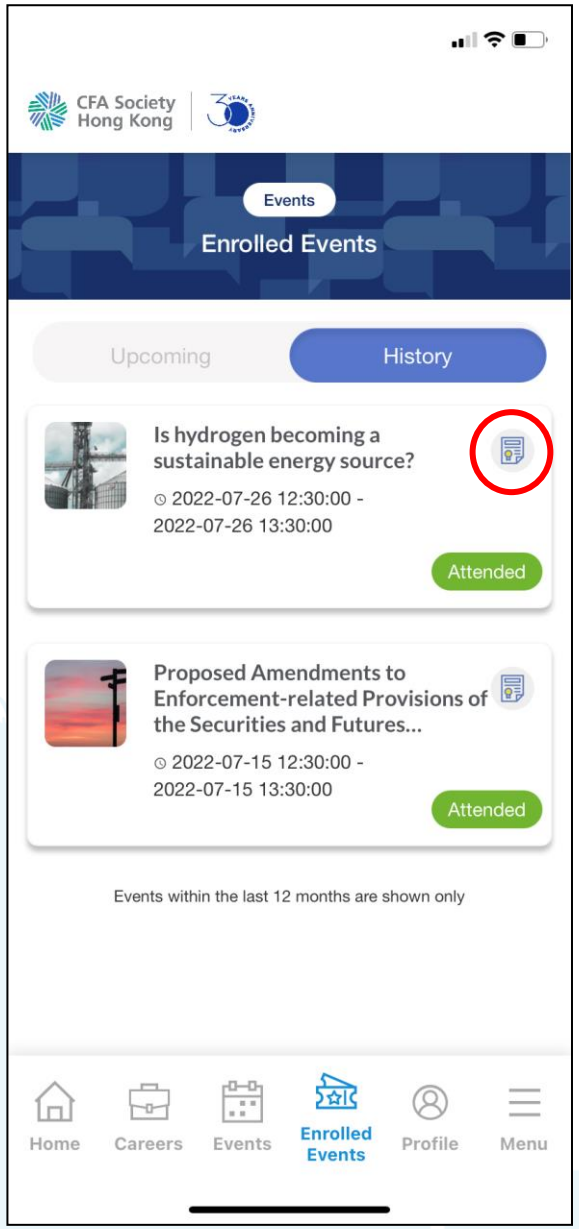
  Not Applicable

  No Show

  Cancelled

  Event Cancelled
- A cert button (red circled) will be available to click and download the CPT certificate for that event, if applicable.

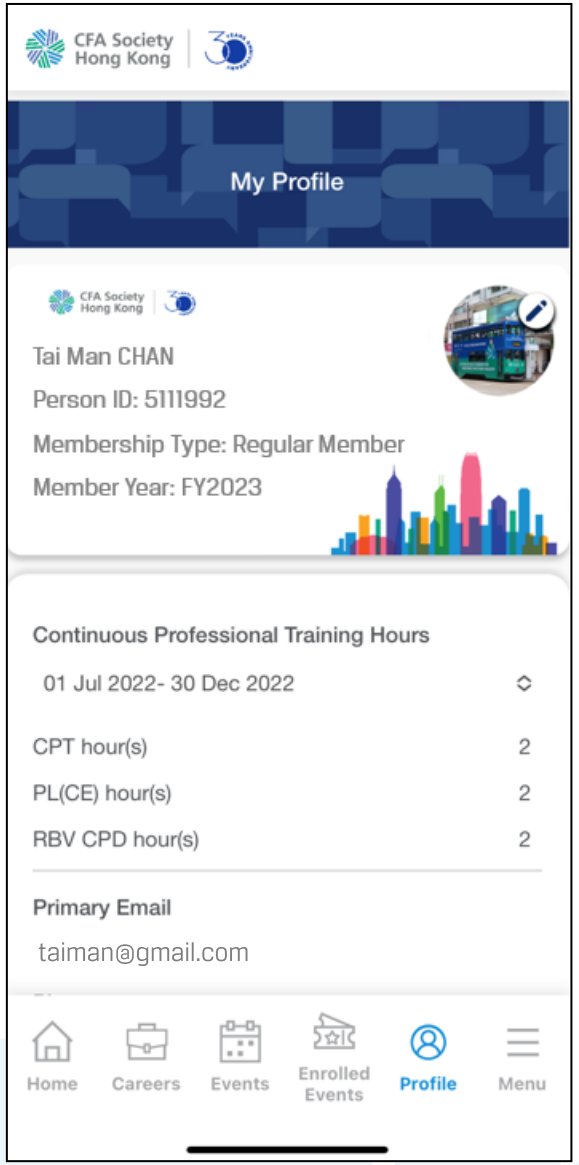




6. Profile + e-membership card

- You can find your e-membership card on **Profile** tab, including key information.
- You can tailor the card by adding a photo:
  - Click the pen icon to add a photo from your album.
  - Click the disk icon to save the photo.
  - Pop-up message "Upload success".
  - Your new profile pic is ready on your e-membership card!

- Your CPT hours summary will be shown by period.



6. Profile + e-membership card (cont'd)

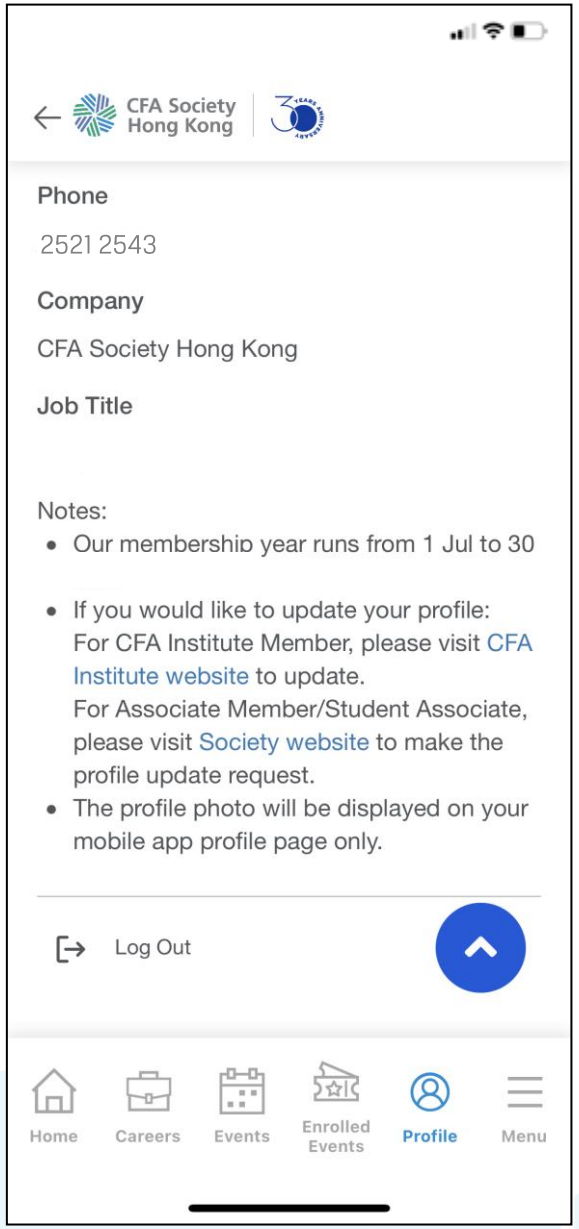
- If you find your information is not updated,

  [For **CFA Institute Member**]

  - Please visit CFA Institute website at https://www.cfainstitute.org/ to update the details.

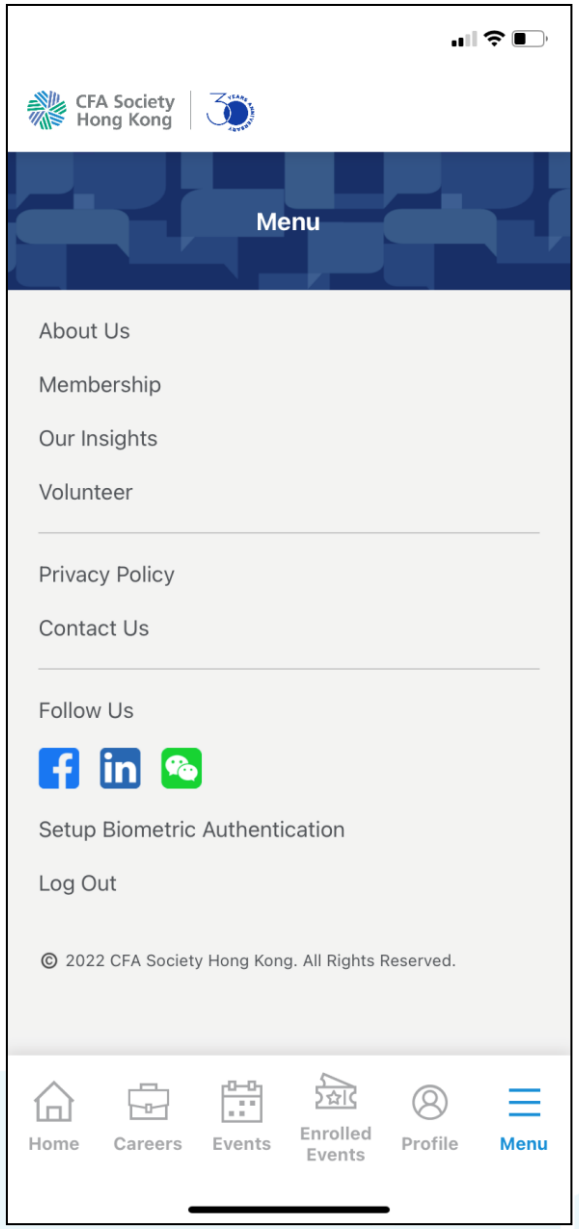
  [For **Associate Member / Student Associate**]

  - Please visit Society website at https://www.cfasocietyhongkong.org/update-my-profile/ to update your profile.
- Your latest information will be refreshed after 1-2 days on Profile tab.
- You can sign out your account on this tab as well, by clicking " [→ Log Out".



7. Menu of Other Information Sections

- You can find more information by extending the Menu
  - About us
  - Membership
  - Our Insights
  - Volunteer
  - Privacy Policy
  - Contact Us
- You can also click to check out our social media platforms:
  - Facebook
  - LinkedIn
  - WeChat (ID: CFA Society HK)
- You can sign out your account on this tab as well, by clicking "Log Out".



For enquiry on mobile app, please contact us at

events@cfasocietyhongkong.org

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