

Self-Serve Journeys – Esign on Net (EON) deck

Date: February 2024 v4.0



Overview of vision, objectives and benefits

Our Vision

“Digitize all the servicing requests to enhance customer experience & increase usage of the internet banking platform”

5 Key Pillars:



Challenge

Processing of Servicing Requests is **not standardised across regions**. Client experience varies in terms of channel, documentation and requirements resulting in a poor customer experience:

- Process not supported by internet banking platform – Strategic channel
- Need to print, post , visit branch or use telephone
- Slow response increasing risk (new card sent to wrong address) & inconsistent SLAs
- Lack of self-serve capability

Solution

This proposition aims to **build on our self-service capability** on our **Digital** platforms to digitise all the customer servicing requests from the point of **request creation** (user interface) through to the **core banking systems**, including **customer notification** post completion. This will be achieved by creating a global, dynamic solution through a library of modular assets / components to maximize re-usability across platforms.

Potential Benefits

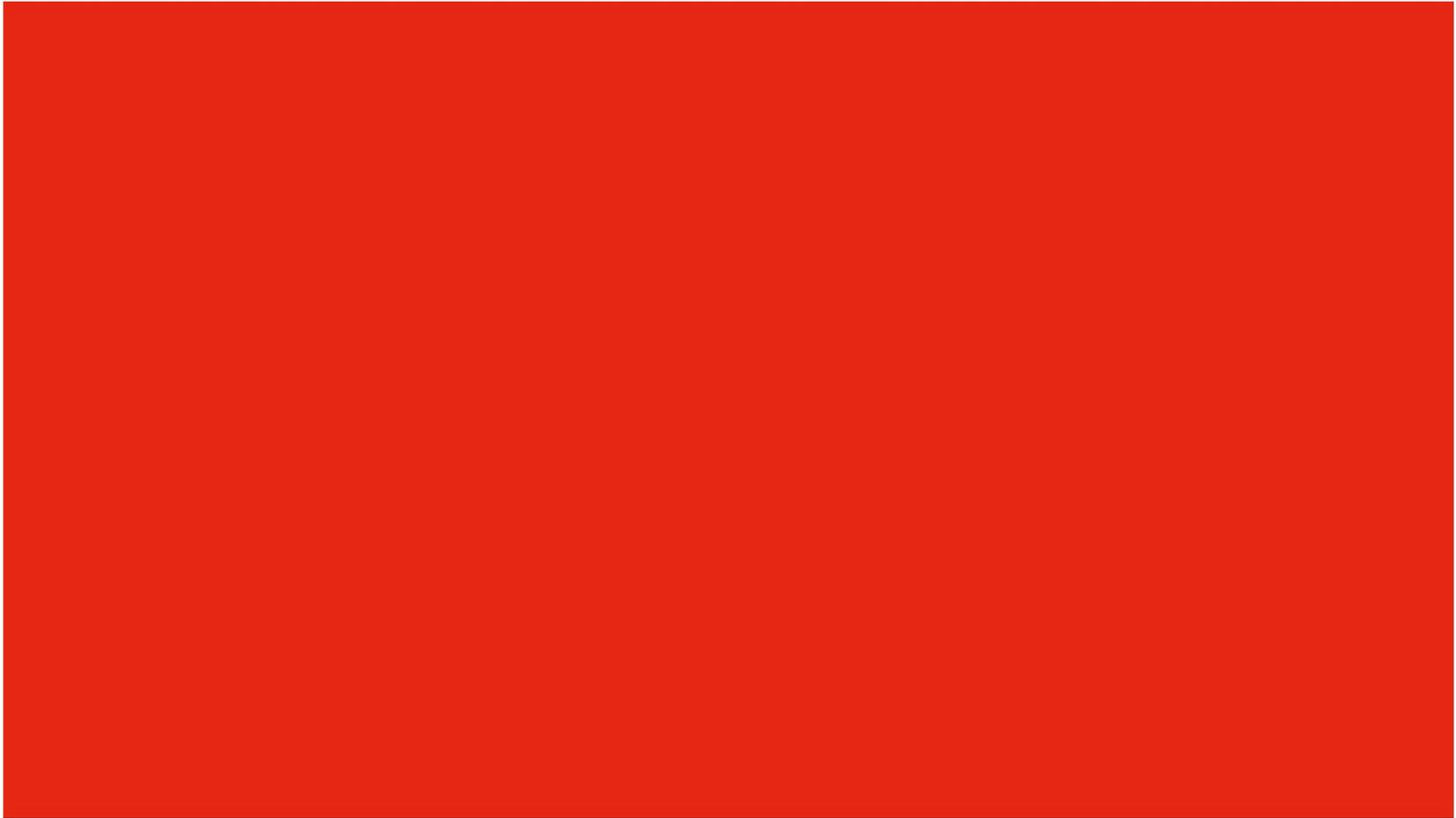
- **Customer Experience:** Increased customer self-service with an omni-channel experience, leading to better stickiness / less attrition
- **E2E Capacity Uplift:** Reduced contact to RMs for simple tasks and queries; Elimination of scanning requirements in middle office; Reduced workload for operations
- **Cost Saves:** Elimination of paper and associated costs (printing, scanning, posting) ; Reduced cost of re-work resulting from human error
- **Efficient Processes:** Faster turnaround time for request completion and less chasers / complaints from customers

List of Self-Serve Journeys available on HSBCnet

List of Self-Service Journeys	
Change of company contact details -DSR	Change How you Receive Statements
Request Balance Certificate - DSR	Change of Contact Callback
Request Banker's Certificate or reference - DSR	Cheque Deposit Certificate
Request Statement History - DSR	Cheque Paid Certificate
Manage Email Statements - DSR	Closure Proceeds Letter
Order Cheque Book - DSR	Debit or Credit Letter
Account Closure Letter	Overdraft Interest Statement
Authorized dealer code	Solvency Letter Request
Authorized Signatory Certificate	Term Deposit Interest Certificate
Cashier order payable clearances certificate	Term Deposit Details

EON Video

- Click in red box below then click  to play EON video



- EON Customer Journey – HSBCnet screens



DEMO – HSBCnet user (Requestor) logs in to HSBCnet and selects the request type from the menu

HSBCnet user Logs In and selects Self-service and support menu item - then clicks on the required service using HSBCnet 'Mega menu'

The screenshot displays the HSBCnet 'Mega menu' interface. The top navigation bar includes 'Menu', 'Account information', 'Create payment or transfer', 'Reports and files download', 'File upload', 'Quick start guide', and 'Tasks' (with a notification badge for 7 tasks). The main menu is organized into three columns:

- Column 1:** Accounts, Liquidity and investments, Payments and transfers, Receivables, User and account management, Net Plus, **Self-service and support** (highlighted with a red bar).
- Column 2:** Manage cheques, Payment support, Manage accounts, Manage company, Manage HSBCnet profile, **Request certificates** (highlighted with a red bar), Security and fraud protection, Support and feedback, Request inbox.
- Column 3:** Request banker's certificate or reference letter, Request balance certificate, Term deposit interest certificate, Term deposit details, Cheque paid certificate, Cheque deposit certificate, Cashier order payable clearances certificate, Authorised signatory certificate, Solvency certificate, Authorised dealer code, Overdraft interest statement, Debit or credit confirmation letter.

A 'Need help?' button is visible on the right side of the menu. The bottom of the screen shows the text 'India HBAP (INR - INDIAN Rupee)'.

DEMO – Requestor can also access the request via the Message Centre ‘create request’ option – but would need to know the correct category & request type

OR HSBCnet user can select the request type from the HSBCnet message centre using ‘create request’

Message Centre | HSBCnet

www2.secure.hsbcnet.com/uims/portal/HSBCnet/Landing.jsessionid=0000lfo1_EX3Wsu91VUwXlReJlfu30V0SwmW#/message-centre/creation

HSBC

English

Adam Golicki
Last login: 18 Nov 21 17:06 GMT

Log off

Menu

User management

Quick start guide

Create request

Tasks 12

Create request

1. Enter details

2. Review and submit

* Indicates required field

Category*

Please select

Request type*

Please select

Continue

Need help?

Online security

HSBC Global

Customer support

Live Share

Terms & Conditions of use

Privacy and data protection statement

HSBCnet condition of national language use

沪ICP备15029387号

沪公网安备31011502007001号

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DEMO – HSBCnet user Requestor selects the company or account for which the request is to be raised – This is just an example of Authorised dealer code request

HSBCnet user selects the category, request type, Country and Company name from the HSBCnet dropdown

Menu Account information Create p...ransfer Reports ...ownload File upload Quick start guide Authoris...er code

Create request

1. Enter signatories 2. Review signatories 3. Enter request details and sign

* Indicates required field

Category*	Company details
Request type*	Authorised dealer code
Location and institution*	India - HK and Shanghai Banking Corp Ltd
Company name and number*	TEST ACCOUNT 1 INHSBC

[Read more about how to create a request using the 'authorisation via esign' permission](#)

DEMO – Requestor enters their own details

In the requestor's details section, ensure that your email address and mobile numbers are accurate. You can edit them if necessary

HSBC

English Last logon: 23 Feb 24 12:59 GMT Jayesh Jethwa

Menu Account information Create p...ransfer Reports ...ownload File upload Quick start guide Authoris...er code

Requestor's details

Name Ja [redacted]

Email* [redacted]@hsbc.co.in Edit 

 Notifications related to the request will be sent to this email address.

Mobile number* Country / territory code Number

+91 [dropdown] [redacted]z67 Edit 

 Please make sure the mobile number is correct.

What you'll need for this request

Documents required for this request

No documents are required for this request type.

DEMO – Things to keep in mind before continuing.....

HSBC🔔?English ▾Last logon: 23 Feb 24 12:59 GMT⚙️ Jayesh Jethwa ▾Log off

☰ Menu Account ...rmation Create p...ransfer Reports ...ownload File upload Quick start guide Authoris...er code ☰³ Tasks

Alert me when the status changes* ? Yes No

By ticking this box, you confirm that you're authorised by the profile owner and any relevant account holder to:

- submit and (if you're the approver) approve the above requests;
- agree to terms and conditions or provide confirmations on their behalf (where the above requests require it)

You also confirm that all information provided is true and correct.

Continue

DEMO – Requestor then adds signatories

Any signatories you add must be authorised as per the company BR to approve this request. An email will be sent to the signatories along with a one-time passcode on their mobile phone so they can review & consent to the request.

Who should I add as signatories for this request?

Enter required company signatories in-line with the bank account mandate signing rules. Please check as the rules often require more than one signatory.

Note: Both the requestor and all signatories must be registered with Aadhar to enable them to sign this request.

Add signatories

 Any signatories you add must be duly authorised by the company to approve this request

An email will be sent to the signatories, as well as a one-time passcode on their mobile phone so they can review and sign the request. Once all signatories have signed the request, we'll process it. You don't need to enter your own details again if you are also a duly authorised signatory for the company.

No signatories added.

[+ Add signatories](#) 

DEMO – Requestor enters signatory details

HSBCnet user adds signatory name, email & mobile phone details for all required signatories *(in line with BR)*

Message Centre | HSBCnet

www2.secure.hsbcnet.com/uims/portal/HSBCnet/Landing;jsessionid=0000fo1_EX3Wsu91VUwXIRelJfu30V0SwmW#/message-centre/creation

English Adam Golicki Last logon: 18 Nov 21 17:06 GMT Log off

Menu User management Quick start guide Create request Tasks

Signatory 1

Name*	First name	Last name	✕
	<input type="text" value="John"/>	<input type="text" value="Doe"/>	
Email*	<input type="text" value="adam@golicki.com"/>		
Confirm email*	<input type="text" value="adam@golicki.com"/>		
Mobile number*	Country / Territory code	Number	
	<input type="text" value="+44 United Kingdom"/>	<input type="text" value="7123456789"/>	

i Please make sure the mobile number is correct.

+ Add signatories ?

Need help?

Continue

DEMO – Adding additional signatories as required in line with the BR

HSBCnet user confirms that signatories listed are authorised to approve the relevant service request selected

The screenshot shows the HSBCnet user interface. The browser address bar displays the URL: www2.secure.hsbcnet.com/uims/portal/HSBCnet/Landing?sessionId=0000lfo1_EX3Wsu91VUwXIRellfu30V05wmW#/message-centre/creation. The page header includes the HSBC logo, a navigation menu with 'User management', 'Quick start guide', and 'Create request', and a user profile for Adam Golicki with a 'Log off' button. The main content area contains a form for adding signatories. The form fields are: Name* (First name: John, Last name: Doe), Email* (adam@golicki.com), Confirm email* (adam@golicki.com), and Mobile number* (Country / Territory code: +44 United Kingdom, Number: 7123456789). A note below the mobile number field states: 'Please make sure the mobile number is correct.' Below the form is a '+ Add signatories' button and a checkbox with the text: 'By ticking this box, I confirm that the signatories listed above are authorised to approve change requests.' A 'Continue' button is located at the bottom right of the form. A 'Need help?' button is visible on the right side of the page.

DEMO – Requestor reviews the details entered -

The screenshot shows a web browser window with the URL `www2.secure.hsbcnet.com/uims/portal/HSBCnet/Landing;jsessionid=0000fo1_EX3Wsu91VUwXIREJlfu30V0SwmW#/message-centre/creation`. The page is titled "Create request" and features a progress bar with three steps: "1. Enter signatories", "2. Review signatories" (the current step), and "3. Enter request details and sign".

The main content area is divided into two sections:

- Company details:**

Category	Company details
Request type	Change company name
Location and institution	Great Britain - HSBC UK Bank PLC
Company name	E-Trade Live Environment
Company number	1059210924
- Requestor's details:**

Name	Adam Golicki
Email	adam.golicki@hsbc.com <small>• Notifications related to the request will be sent to this email address.</small>
Mobile number	+44 7785324050 <small>• Please make sure the mobile number is correct.</small>

At the bottom of the form, there are two buttons: "Edit" and "Continue". A vertical "Need help?" button is located on the right side of the page.

DEMO – And then confirms that details are correct, and signatories are authorised to approve the request type

Message Centre | HSBCnet

www2.secure.hsbcnet.com/uims/portal/HSBCnet/Landing?sessionId=0000fo1_EX3Wsu91VUwXIREJlfu30V0SwwW#/message-centre/creation

HSBC English Adam Golicki Last logon: 18 Nov 21 17:06 GMT Log off

Menu User management Quick start guide **Create request** Tasks

Mobile number +44 7785324050
Please make sure the mobile number is correct.

Add signatories

i Any signatories you add must be authorised by the company mandate to approve requests.
An email will be sent to the signatories along with a one-time passcode on their mobile phone so they can review and consent to the request. Once all the signatories have approved the request, we'll process it. You don't need to enter your details again even if you are a signatory on the company mandate.

Signatory 1

Name	John Doe
Email	adam@golicki.com
Mobile number	+44 7123456789 Please make sure the mobile number is correct.

I confirm that the signatories listed above are authorised to approve change requests.

Edit Continue

Online security HSBC Global Customer support Live Share

Need help?

DEMO – Once you have submitted a request, an email will be sent to the relevant signatories and accept Adobe Terms and conditions - This is just an example of Authorised dealer code request

The screenshot shows the HSBC user interface for creating a request. At the top, the HSBC logo is on the left, and user information (Jayesh Jethwa) and a 'Log off' button are on the right. A navigation menu includes 'Menu', 'Account information', 'Create p...ransfer', 'Reports ...ownload', 'File upload', 'Quick start guide', and 'Authoris...er code' (which is underlined). A 'Tasks' button with a notification badge is also present. Below the navigation is a 'Create request' section with a three-step progress bar: '1. Enter signatories', '2. Review signatories', and '3. Enter request details and sign'. An information icon (i) is followed by the text: 'Once you've submitted a request, an email will be sent to the relevant signatories.' A 'Cancel request' button is located to the right. The main content area displays the title 'Authorised dealer code', the sender 'From: HSBC Operations', and the instruction 'Please review and complete this agreement.' A large grey rectangular area is visible at the bottom of the page.

DEMO – The Requestor accepts Adobe T&Cs to enable form to be editable

Requestor must accept Adobe T&Cs to enable form to be edited - clicking both tick boxes to proceed

To continue, you must click and review the link to the consumer disclosure below.

I have read and agree to the Adobe [Terms of Use](#). See our [Privacy Policy](#) for details on our privacy practices.

I agree to the [Consumer Disclosure](#).

Accept

Or [Decline to sign](#) | [Delegate signing to another](#)

DEMO – The Requestor then completes the eForm –
This is just an example of Authorised signatory certificate request

The form for the request type selected by you will appear on the next screen. Mandatory fields need to be completed along with attachments where required. The form has its own navigation to guide you through .

The screenshot shows the HSBC online banking interface. At the top, there is a navigation bar with the HSBC logo, a menu icon, and several menu items: 'Account information', 'Create p...ransfer', 'Reports ...ownload', 'File upload', 'Quick start guide', and 'Authoris...ificate' (which is highlighted). To the right of the menu, there are icons for notifications, help, and language (English), along with the user's name 'Jayesh Jethwa' and a 'Log off' button. Below the navigation bar, there is a progress indicator with three steps: '1. Enter signatories', '2. Review signatories', and '3. Enter request details and sign'. An information icon and a 'Cancel request' button are also visible. The main content area is titled 'Authorised signatory certificate' and features the HSBC logo and the title 'Authorised signatory certificate'. Below the title, there is a paragraph of text explaining the form's purpose. Two input fields are visible: 'Customer Name' and 'Date (dd/mm/yyyy)', both marked with a red asterisk to indicate they are mandatory. The 'Customer Name' field is highlighted in yellow. At the bottom, a section titled 'Section 1 - Account Applicability' is partially visible.

DEMO – Uploads any required supporting documents and complete the remaining details as asked on this page

Requestor then completes the Service Request form, answering all mandatory Qs and uploading any required documents

HSBC

English Last logon: 23 Feb 24 12:59 GMT Jayesh Jethwa Log off

Menu Account information Create p...ransfer Reports ...ownload File upload Quick start guide Authoris...ificate Tasks

1. Enter signatories 2. Review signatories 3. Enter request details and sign

Once you've submitted a request, an email will be sent to the relevant signatories. Cancel request

Options Authorised signatory certificate Next required field 10

Section 1 - Account Applicability

Please specify the account(s) to which the below request(s) is/are applicable:

Account number(s) (xxx-xxxxxx-xxx)

Next

*	-	*	-	*
	-		-	
	-		-	
	-		-	
	-		-	

If you are wanting to effect for more than five (5) accounts. Please upload an excel with matching columns using the upload documents field below

Click to Attach File Here

DEMO – Requestor is asked to sign the request to confirm all details have been correctly entered

Requestor then has to sign the request...

HSBC

English Last logon: 23 Feb 24 12:59 GMT Jayesh Jethwa Log off

Menu Account information Create p...ransfer Reports ...ownload File upload Quick start guide Authoris...ificate Tasks

Once you've submitted a request, an email will be sent to the relevant signatories. Cancel request

Options Authorised signatory certificate Next required field 10

Section 2 - Signing and Authorisation

This section must be signed by the Requestor and Authorised Signatories as applicable (in accordance with signing arrangement)

I confirm that all the information provided above is correct

Requestor Signature

Click here to sign

Is the requestor also an authorised signatory? Yes No

Where the requestor is also indicated as an Authorised Signatory in accordance with signing arrangement, the requestor's signature is provided in their capacity as both requestor and an Authorised Signatory. There is no need to sign again in the signature box as an authorised signatory.

DEMO – Select the Click to sign button to complete & submit the form. The button will appear on the bottom of the form once all mandatory fields have been completed.

Change company name

Authorized signatory 1	Authorized signatory 2
Name	Name
Date	Date

Disclaimer :

I confirm that all information provided above is accurate.

Internal Use

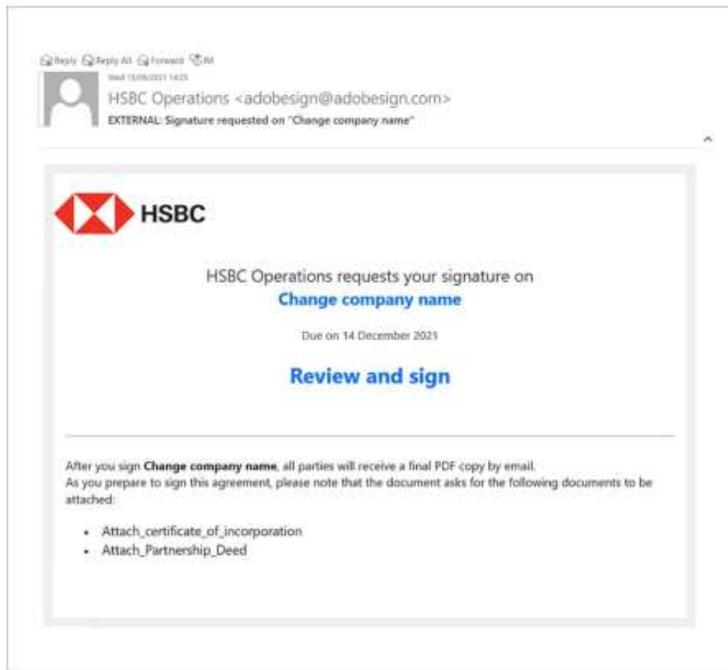
CIN	<input type="text"/>	Customer Account Number	<input type="text"/>
Customer Account Sontcode	<input type="text"/>	Customer Company Name	<input type="text"/>

By signing, I agree to both this agreement and the [Consumer Disclosure](#). My use of Adobe Sign is governed by the [Adobe Terms of Use](#).

[Click to Sign](#)

DEMO – If you have added additional authorisers, they will receive an email from HSBC Operations (adobesign@adobesign.com) requesting them to review and sign the instruction.

Tip – Authorised signatories should be advised to expect these emails and requested to check their email spam folder in case your company’s security settings filter these emails.



Once all the authorisers have electronically signed the instruction. HSBC will process it. The bank will contact you. If there are any issues or additional information is required.

Note – Reminder emails are sent by the Bank when:
- As a requestor, you have initiated a request but not completed the form or
- As a signatory, if you have not yet signed the request.

DEMO – Authorised signatories to click on Review and Sign link to complete the request. Once click on this link, the authorised signatories will have to click on **send code** to get a verification code and submit the request.

Note – Code will be delivered to the number mentioned in the below screen, which is put in by the inputter/user who initiated the request.



This document requires phone verification

Please confirm your identity by entering a verification code sent to the following phone number: +XX XXXXXX2267.

If this is not your phone number, please contact [HSBC Operations](#).

Verification Options

- Voice Call
- Text Message

After clicking the 'Send Code' button, you will receive a phone call or text message with a verification code that you must enter to view the document.

Standard text messages and voice rates apply.

[Send Code](#)



This document requires phone verification

Please confirm your identity by entering a verification code sent to the following phone number: +XX XXXXXX2267.

If this is not your phone number, please contact [HSBC Operations](#).

Code

[Continue](#)

[Return to verification options](#)

DEMO – The authorised signatories to accepts Adobe T&Cs to enable form

Term Deposit interest certificate

From: HSBC Operations

Please review and complete this agreement.



I have read and agree to the Adobe [Terms of Use](#). See our [Privacy Policy](#) for details on our privacy practices.

I agree to the [Consumer Disclosure](#).

Or [Decline to sign](#)

Accept

DEMO – Authorised signatories is asked to sign the request to confirm all details have been correctly entered, enter name and designation and submit the request

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Acrobat Sign

Term Deposit interest certificate



Term Deposit Interest Certificate

In this form, the customer whose details are set out in this section may be referred to as the “Customer”, “you” and “your” (in the context of questions posed by or instructions or explanatory notes from HSBC), or “we” (in the context of responses to HSBC or instructions to HSBC).

Customer Name
Digital Test Profile

Date (dd/mm/yyyy)
01/03/2024

Section 1 - Certificate Details

Certificate Period Length



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Acrobat Sign

Term Deposit interest certificate

Requestor Designation
Senior Digital Manager

Authorised Signature 1

*
✕ Click to sign digitally.

Name

*

Designation

*

Authorised Signature 2

Authorised Signature 3

Name

Designation

Authorised Signature 4

Start

DEMO – Click on “Click to Sign” to complete the request and accept Terms and Conditions and complete the Aadhar based authentication

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Term Deposit interest certificate

Digitally signed by Jayesh Jethwa
Date: 2024-03-04 14:16:00+05:30

Jayesh Jethwa

Name

Jayesh Jethwa

Designation

Digital Manager

Authorised Signature 2

Name

Designation

Authorised Signature 4

Name

Name

By signing, I agree to the terms of this agreement and to do business electronically with HSBC.

Click to Sign

DEMO – Click on “Click to Sign” to complete the request and accept Terms and Conditions and complete the Aadhar based authentication

The screenshot shows a web interface on the left and a modal dialog box on the right. The left sidebar contains the text "Powered by Adobe Acrobat Sign" at the top, followed by the name "Jayesh" and several fields: "Name" with the value "Jayesh Jethwa", "Designation" with "Digital Manager", "Authorised Signatory", and another "Name" field. The modal dialog box is titled "Terms and Conditions" and contains a single checkbox that is checked, followed by a paragraph of text. At the bottom of the dialog are two buttons: "Cancel" and "Accept".

Powered by
Adobe
Acrobat Sign

Jayesh

Name
Jayesh Jethwa

Designation
Digital Manager

Authorised Signatory

Name

Terms and Conditions

services and consent to providing my Aadhaar Number and One Time Pin (OTP) data for Aadhaar-based authentication under the Aadhaar (Targeted Delivery of Financial and Other Subsidies, Benefits and Services) Act, 2016 and the regulations framed thereunder, to the NSDL for the purposes of availing of the Aadhaar eSign Service offered by Adobe India. I understand that the OTP I provide to the NSDL for authentication must be used only for authenticating my identity through the Aadhaar e-Sign system, for obtaining my e-KYC through Aadhaar e-KYC service and for the issuance of Digital Signature Certificate (DSC) for this specific transaction only, and no other purposes. With regard to the personal data that Adobe will process in order to deliver the e-Sign Service, I understand and consent to the processing of my personal data, which shall be in accordance with [Adobe's Privacy Policy](#) and as stated in the [Adobe electronic signature services privacy page](#), together "Policy". I understand that, for the purposes of the Aadhaar e-Sign Service offered by Adobe India, all reference to Adobe Ireland in the Policy will be deemed to mean Adobe Systems India Private Limited. I understand that, in addition to the information set in the Policy, Adobe India will also collect (a) last 4 digits of my Aadhaar number; (b) State where I reside; and (c) my PIN code ("eSign Data"). Adobe has implemented security practices and standards and has a comprehensive documented information security programme and information security policies that contain managerial, technical, operational and physical security control measures as required under the Information Technology Act, 2000 to protect eSign Data and will comply with all laws as may be applicable to Adobe India, for the performance of its obligations under the Aadhaar eSign Service Terms.

Cancel Accept

DEMO – Click on “Click to Sign” to complete the request and accept Terms and Conditions and complete the Aadhar based authentication



Adobe Systems India Private Limited has requested to digitally sign the document
Transaction ID: a3da224ba54141910c0e9b231a70ba dated 2024-02-04 14:20:49.771

Please click on the checkbox and enter Aadhaar/Virtual ID

I hereby authorize Protean eGov Technologies Limited (formerly NSDL e-Governance Infrastructure Limited) to –

1. Use my Aadhaar / Virtual ID details (as applicable) eSign of documents requested using Adobe Sign solution for/with Adobe Systems India Private Limited and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose.
2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) eSign of documents requested using Adobe Sign solution for/with Adobe Systems India Private Limited.

VID/Aadhaar: 

 NSDL e-Gov is now 

[Click Here](#) to generate Virtual ID. [Download Instructions](#) to generate Virtual ID in lieu of Aadhaar.

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Please do not press "Submit" button once again or the "Refresh" or "Back" buttons.

DEMO – Once completed it will show that you have finished signing

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You're all set

You finished signing "Term Deposit interest certificate".

We will email the final agreement to all parties. You can also [download a copy](#) of what you just signed.

DEMO – Once signing is completed, requestor and authorised signatories will receive an email, confirming that the request has been submitted with form details.

EXTERNAL: Completed: 'Term Deposit interest certificate'

AA Adobe Acrobat Sign on behalf of HSBC <adobesign@adobesign.com>
To Jayesh JETHWA

If there are problems with how this message is displayed, click here to view it in a web browser.

PDF Term deposit interest certificate (IN) - signed.pdf
477 KB



EXTERNAL: Completed: 'Term Deposit interest certificate'

AA Adobe Acrobat Sign on behalf of HSBC <adobesign@adobesign.com>
To Jayesh JETHWA

If there are problems with how this message is displayed, click here to view it in a web browser.

PDF Term deposit interest certificate (IN) - signed.pdf
477 KB



- **EON Customer Journey - HSBCnet entitlements screens**

- **EON – Before you begin**

- Your system administrator must grant other system administrator permission to the Message center- company service request feature and to the companies that they are allowed to make changes to.
- - To use the E-signature feature, you must be granted Authorisation via esign process permission for each company on the Message Centre- company service requests page
- - If Authorisation via esign process permission is granted for an account, you will automatically be granted permission to enquire and create company service requests.
- If your company chooses Sole message control, this permission allows the submitted changes to be processed without further approvals. If not each request/message must be authorised by another permitted user before it is processed.

DEMO – HSBCnet user or SA User wants to amend User EON entitlements

HSBCnet SA User clicks User management and then selects the required profile and selects View permissions

The screenshot shows the HSBCnet User Management interface. At the top, there is a navigation bar with the HSBC logo, a menu icon, and several menu items: 'User management' (highlighted), 'Account management', 'Message Centre', and 'Create request'. On the right side of the navigation bar, there is a user profile for 'Christopher Cardno' with the last login time '09 Feb 22 11:08 GMT' and a 'Log off' button. Below the navigation bar, there is a 'Users' section with three buttons: '+ Manage user groups', 'Signature groups and limits', and '+ New user invitation'. A 'Filter' dropdown is located above the user list. The user list table has columns for 'Tasks', 'Name', 'Username', 'Location', 'Company name', 'User type', and 'Status'. The user 'Cardno, Christopher' is highlighted in a light blue row. Below the table, there are buttons for 'Delete', 'Suspend', 'Reactivate', 'View permissions' (circled in blue), and 'View user details'. A 'Need help?' button is visible on the right side of the interface.

Tasks	Name	Username	Location	Company name	User type	Status
	ADAMIDIS, ILIAS	43489068_GB_SA	United Kingdom	HSBC Bank PLC	System Admin	Active
	AGGARWAL, DIVYA	43641638_gb_sa	United Kingdom	HSBC	System Admin	Active
	ALIMI, Ayisat	43788205_GB_SA	United Kingdom	HSBC Bank	System Admin	Active
	Begum, Tyab	43920667_in_sa2	India	HSBC EDPI	System Admin	Active
	Biondino, Daniel	45027332_GB_SA1	United Kingdom	HSBC	System Admin	Active
	Caò, Vicki	43227173_CN_EU	China	HSDC	End User	Active
	Cardno, Christopher	43985682_GB_SA	United Kingdom	HSBC	System Admin	Active

DEMO – HSBCnet user selects the permission they wish to edit

HSBCnet user selects Self-service and support tab and then selects Message centre – company service requests and then Edit permissions

The screenshot displays the HSBCnet user management interface. The user profile for Adam Golicki is shown, with the 'Permissions' tab selected. The 'Self-service and support' category is highlighted in the left-hand menu, and the 'Message centre - company service requests' sub-tab is active. A table lists various company-level permissions with columns for Enquire, Create, Authorise, Sole message control, and View accounts. The 'Edit permissions' button is circled in blue.

Companies	Enquire	Create	Authorise	Sole message control	Authorisation via mandate process	View accounts
Canada HBCA						
CAHKBC270012710	✓	✓	✗	✗	—	🔒
BIB TEST OTP SOLE						
CAHKBC270012729	✓	✓	✗	✗	—	🔒
BIB TEST SOLE						
United Kingdom HBEU						
1000006666	✓	✓	✓	✓	—	🔒
Global Liquidity Solutions						
1008134528	✓	✓	✓	✓	—	🔒
BUSINESS HEXAGON TEST						
1009141050	✓	✓	✓	✓	—	🔒
NRFB BIB Test Three						
1022753243	✓	✓	✓	✓	—	🔒
Business Hexagon Test						
1065624514	✓	✓	✓	✓	—	🔒
Mark Irwin - Internal...						
1152833197	✓	✓	✓	✓	—	🔒
1152833197						
1914549597	✓	✓	✓	✓	—	🔒
1914549597						
United Kingdom HRRR						

DEMO – HSBCnet user accesses Company Service Requests

HSBCnet user selects all companies or individual companies' button and then ticks Authorisation via esign process for required companies

The screenshot displays the HSBCnet user interface. The top navigation bar includes the HSBC logo, user profile (Jayesh Jethwa), and a 'Log off' button. The main navigation menu lists various services, with 'Message centre - company service requests' highlighted. The main content area shows the 'Message centre - company service requests' page, which includes a search bar, a 'Configure by' section (set to 'Individual companies'), and a table of company service requests. The table has columns for 'Companies', 'Enquire', 'Create', 'Authorise', 'Authorisation via esign', and 'View accounts'. The 'Authorisation via esign' column is highlighted in yellow. Below the table, there are two buttons: 'Copy this user's permissions' and 'Edit permissions'.

Message centre - company service requests Key ⓘ

Configure by: Individual companies All companies

Company level

Filter

Companies	Enquire	Create	Authorise	Authorisation via esign	View accounts
Canada HBCA					
CAHKBC270012729	×	×	×	×	📄
BIB TEST SOLE	×	×	×	×	📄
India HBAP					
INHBC019782333	✓	✓	✓	✓	📄
PCM TEST ACCOUNT 1	✓	✓	✓	✓	📄

[Copy this user's permissions](#) [Edit permissions](#)

DEMO – HSBCnet user ticks EON entitlement (1/2)

This requests the Authorisation via esign, Enquire & Create entitlements to that user

The screenshot shows the HSBCnet user interface. The top header includes the HSBC logo, user name 'Jayesh Jethwa', and 'Log off' button. The navigation menu on the left lists various services, with 'Self-service and support' expanded to show 'Message centre - company ser...' and 'Message centre - other request t...'. The main content area is titled 'Message centre - company service requests' and contains an 'Important notes' section with a list of bullet points. Below this is a 'Configure by:' section with radio buttons for 'Individual companies' (selected) and 'All companies'. The 'Company level' section includes a 'Filter' dropdown and a table of entitlements.

Companies	Enquire	Create	Authorise	Authorisation via esign	View accounts
Select column	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

DEMO – HSBCnet user ticks EON entitlement (2/2)

This requests the Authorisation via esign, Enquire & Create entitlements to that user

The screenshot shows the HSBCnet user interface. The top navigation bar includes the HSBC logo, a notification bell, a help icon, a language dropdown set to 'English', the last login time '23 Feb 24 12:59 GMT', the user name 'Jayesh Jethwa', and a 'Log off' button. Below this is a secondary menu with options: 'Menu', 'Account information', 'Create payment or transfer', 'Reports and files download', 'File upload', 'Quick start guide', and 'Tasks' (with a red notification badge '3').

The main content area is titled 'Configure by:' and has two radio buttons: 'Individual companies' (selected) and 'All companies'. Below this is a 'Company level' section with a 'Filter' dropdown, 'Select all', 'Clear all', and 'Guide' (with an info icon) links.

The main table displays entitlements for various companies. The columns are: 'Companies', 'Enquire', 'Create', 'Authorise', 'Authorisation via esign', and 'View accounts'. The 'Create' column is highlighted in yellow. The 'Authorisation via esign' column also has a yellow highlight in the 'Select column' row.

Companies	Enquire	Create	Authorise	Authorisation via esign	View accounts
Select column	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Canada HBCA					
CAHBC [redacted]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BIB TEST SOLE					
India HBAP					
INHBC [redacted]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PCM TEST ACCOUNT 1					

Countries where DSR/EON is live

Region	Markets	DSR	EON
EUR	Belgium	No	Yes
EUR	Bermuda	No	Yes
EUR	Czech	No	Yes
EUR	France	No	Yes
EUR	Ireland	No	Yes
EUR	Israel	No	Yes
EUR	Italy	No	Yes
EUR	Luxembourg	No	Yes
EUR	Malta	No	Yes
EUR	Netherlands	No	Yes
EUR	Poland	No	Yes
EUR	Spain	No	Yes
EUR	Switzerland	No	Yes
EUR	UK (RFB)	Yes	Yes
EUR	UK (NRFB)	Yes	Yes
NAM	Canada	Yes	Yes

Region	Markets	DSR	EON
NAM	Mexico	No	No
NAM	US	No	No
ASP	Australia	No	No
ASP	China	Yes	No
ASP	India	Yes	Yes
ASP	Japan	No	No
ASP	Hong Kong (AMH)	Yes	Yes
ASP	HK HASE	Yes	No
ASP	Indonesia	No	No
ASP	Malaysia	Yes	No
ASP	New Zealand	No	No
ASP	Philippines	No	No
ASP	Singapore	Yes	Yes
MENAT	Egypt	Yes	No
MENAT	Oman	No	No
MENAT	Saudi Arabia	No	No
MENAT	UAE	No	No