

HSBCnet User Guide

Adding a new user

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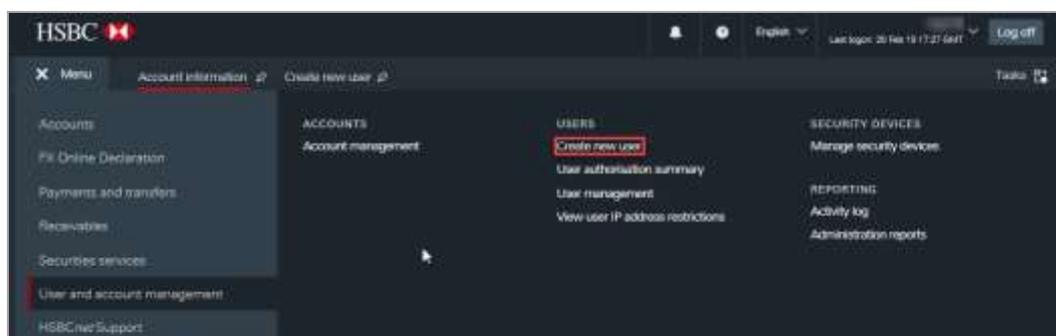
Adding a new user

As a System Administrator, use the Simplified New User Creation procedure to partially register new End Users or System Administrators first, thereafter allowing them to complete the rest of the registration and activate their HSBCnet access.

To register a new User with this Simplified New User Creation, complete the following steps:

1. Log on to HSBCnet and access the User Management service under the User and Account Management tab.
2. Select the Create new user link to proceed.

Create New User link



Authenticate yourself using your Security Device by following the on-screen instructions.

The Create New User page appears. To speed up the registration process, you are only required to complete the mandatory fields marked with an asterisk (*). The new user will be asked to confirm the information you've entered and supply additional information.

Step 1: Enter new user's details

Step 1. Enter new user's details: Complete the mandatory fields in each of the following sections in this step:

Personal details

Contact details

User details, and

Log on (method)

In the User details section, select Yes in the Auto-entitle user field to create an auto-entitled user.

If the user being created is an Authorizer – For that user please capture the company followed by AUTH . Foreg Company Name – AUTH (XYZ – AUTH)

Personal details

< **Create new user**

1. Enter new user's details

2. Review and confirm

*Required information

Personal details

Title*

Full legal first name*

Full legal middle name

Full legal last name*

Contact details

Email address

Work email address*

Confirm work email address*

Mobile phone number i Please enter a mobile number if the user is going to log on using a mobile device.

Country/Territory code*

Mobile phone number*

Work phone number

Country/Territory code

Work phone number

Contact details

User details

New User's details

User details

Customer ID

User type* ?

Auto-entitle user* ?

Temporary username* ?

Company name

Preferred language

Note: In the Log on section, mobile number is mandatory if mobile device is selected as for log on.

Log on section – example

Refer to the section on Logon scenarios in this guide for detailed information about completing this section.

New User Details Tab – Fields

Field name	Description
Personal details	
Title, Full legal first name, Full legal middle name, Full legal last name	Title, full first, middle and last names.
Contact details	

E-mail address at work	<p>Email address at work. When confirming the e-mail in the next field you are not allowed to copy and paste the e-mail. You must type it in.</p> <p>Activation code and the Temporary Username are sent to this address.</p>
Mobile phone number	<p>Please enter a mobile number if the user is going to log on using a mobile device. Country/territory code and phone number. Note: in certain markets like Hong Kong, providing a mobile number is mandatory to issue access codes to the user.</p>
Work telephone number	Country/territory code and phone number at work
User details	
Customer ID	This field is auto-populated
User Type	System Administrators have administration rights.
Field name	Description
	<p>These users are able to set up and maintain the access rights of other users. Considerable care should therefore be employed in assigning System Administrator status to a user.</p> <p>End users do not have administration rights.</p> <p>These users are not permitted to set up or maintain the access rights of other users. Most users will normally be in this category.</p>

Auto-entitle user	Auto entitlements will grant the user access to all accounts and services for HSBCnet. When a user is granted auto entitlements, you will lose the ability to grant or remove individual account or service access. You will be able to turn on or off auto entitlements anytime by selecting Yes or No from the drop-down options.
Temporary Username	The temporary username is auto-generated by the system and pre-populated in this field. The new user is still allowed to change the temporary username if they desire to do so during the initial log on. Note: For customers with Mexico profile, changing the temporary username is mandatory.
Company name	Enter the name of the company this user is an employee of and if they are an authorizer capture AUTH after the company name to complete the whitelisting steps for a payment authorizer
Preferred language	The chosen language in which all HSBCnet pages will appear. At present, you can choose one of 21 available languages from the drop-down list.
Log on	
Full access	<p>Mobile Device: Allows users to set up their mobile devices and log on using a security device code generated on their mobile device. You may also choose the Security Device option to use your mobile device.</p> <p>Note: If you choose the mobile device as the user's logon option, the mobile number becomes a mandatory field.</p>
	Security Device: Allows users to log on with a one-time password generated on their Security Device.

Review and confirm. In this step you are able to review the information entered in the previous step and confirm user creation.

7. a. If your company follows Sole Administrative Control, an email is sent to the New User containing the temporary username and instructions to log on.
- b. If your company follows Dual Administrative Control, the status of this instruction is User Creation-Pending approval. Another System Administrator with approve rights must log on and first authorise the User creation followed by authorising the permissions just granted.
8. Once the user creation is completed, the user will automatically be granted entitlements to whitelisted services as per customer's assigned services and account.

Note :-choose the user from the Task menu>Authorise>User to complete the authorization for a dual administrative control

