

Initial setup

A. Change User's Signature Group

Step 1

The screenshot shows a web application interface with a left-hand navigation menu and a main content area. The navigation menu includes: Accounts, Pay bills, AutoPay, Transfers, Rates enquiry, Services, Statements / Advices, Access and Security (highlighted in red), Activity Log, Create New User, View / Change / Delete User (in red), Account Control, Setup and Change, Authorisation, Contact centre, Trade Services, and Log off. The main content area features a grey header with a red envelope icon and the text 'No new messages', and a 'Print | Tiếng Việt' link. Below this is a 'Review user' section with the instruction 'To view user details, click on user account'. A table with a grey header 'User name' contains one row with a red 'XXXXXXXXXX' placeholder, which is circled in blue. A 'Help' link is visible on the right side of the table.

- ▶ Go to **Access and Security > Manage User**.
- ▶ Click on the User name you wish to set up

Initial setup

Step 2

A. Change User's Signature Group

Signature Group	
Signature group selected	Input and enquiry only
Daily Limit	Daily limit< VND >
Transfers within portfolio	1,000,000,000
Transfers outside portfolio to designated beneficiary	1,000,000,000
Transfers outside portfolio to non-designated beneficiary	1,000,000,000
Bill payments	1,000,000,000
autoPay	1,000
<input type="button" value="Change"/> <input type="button" value="View Another User"/>	

- ▶ The 'User details' page appears. Scroll down to the bottom of the page, the signature group will be displayed as "Input and enquiry only".
- ▶ Click **Change** to amend these details.

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A. Change User's Signature Group

Step 3

Account Name	Account Number	CCY
Select the accounts you want the new user to access (The following is the list of accounts that you have access to)		
<input checked="" type="checkbox"/> CURRENT ACCOUNT	001-123456-001	VND

Services	
Select the services you want the new user to have access to (The following is the list of services that you have access to)	
<input checked="" type="checkbox"/> Account enquiry	<input checked="" type="checkbox"/> Activity log - this user's activities
<input checked="" type="checkbox"/> autoPay	<input checked="" type="checkbox"/> Bill payment
<input checked="" type="checkbox"/> Stop cheque	<input checked="" type="checkbox"/> Transfer
<input checked="" type="checkbox"/> Activity log - all users' activities	<input checked="" type="checkbox"/> Order cheque book
<input checked="" type="checkbox"/> Create priority payment with beneficiary list	<input checked="" type="checkbox"/> Term deposit

- ▶ Next, scroll down to the bottom, tick to assign accounts and services for the primary user. Click **'Proceed'**.

Initial setup

A. Change User's Signature Group

Step 4

User change [Help](#)

Signature Group

Select one of the following.

Signature	A	B	Input and enquiry only
	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Daily Limit Daily limit < VND >

Enter daily limit for each transaction type.

Transfers within portfolio	<input type="text" value="1,000,000,000"/>
Transfers outside portfolio to designated beneficiary	<input type="text" value="1,000,000,000"/>
Transfers outside portfolio to non-designated beneficiary	<input type="text" value="1,000,000,000"/>
Bill payments	<input type="text" value="1,000,000,000"/>
autoPay	<input type="text" value="1,000"/>

- ▶ The 'User change' page appears. Select the signature group relevant to your user. You have no transactional capabilities if 'Input and enquiry only' option is selected.
- ▶ Input the desired **daily limits** for the chosen services. All limits must be 0 if 'Input and enquiry' option selected.

Initial setup

A. Change User's Signature Group

Step 4

Daily Limit	Daily limit < VND >
Enter daily limit for each transaction type.	
Transfers within portfolio	<input type="text" value="1,000,000,000"/>
Transfers outside portfolio to designated beneficiary	<input type="text" value="1,000,000,000"/>
Transfers outside portfolio to non-designated beneficiary	<input type="text" value="1,000,000,000"/>
Bill payments	<input type="text" value="1,000,000,000"/>
autoPay	<input type="text" value="1,000"/>

- ▶ How to set up the daily limit:
 - ▶ The daily limit of primary user is auto-filled with the limit registered in IB application form.
 - ▶ Increase primary user daily limit is not allowed.
 - ▶ If signature group is “A” or “B”, at least one transaction limit must be higher than 0.
 - ▶ If signature group is “Input and enquiry only”, all transaction limits must be set at 0.
- ▶ Click “Proceed” to move on.

Initial setup

Step 5

A. Change User's Signature Group

Signature Group	
Signature group selected	A
Daily Limit	Daily limit< VND >
Transfers within portfolio	1,000,000,000
Transfers outside portfolio to designated beneficiary	1,000,000,000
Transfers outside portfolio to non-designated beneficiary	1,000,000,000
Bill payments	1,000,000,000
autoPay	1,000
<input type="button" value="Confirm"/> <input type="button" value="Change"/> <input type="button" value="Cancel"/>	

► Review all the information. Click 'Confirm' to proceed.


Initial setup

Step 5

A. Change User's Signature Group

Please enter your security code from the security token

Enter security code:



The image shows a black HSBC security token with a small LCD screen displaying a 6-digit security code. A red arrow points from the text 'security code' to the screen. The token has 'HSBC' printed on it.

- ▶ Key in the 6-digit security code generated by the Security Device. Click Confirm.

Initial setup

A. Change User's Signature Group

Step 5

✉ [No new messages](#)

[Print](#) | [Tiếng Việt](#)

User change - Acknowledgement

[Help](#)

Identification

EBN: VNHSBC0010180351

Full Name: SIM TEST COMP3 PU1

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

Date of Birth:

- ▶ The User change – Acknowledgement page is displayed.
- ▶ If the company has dual administrative control, please ask the other Primary User to approve the pending authorization instruction to effect the changes.

Initial setup

B. Set up account control limits

Step 1

Accounts [Print](#) | [Tiếng Việt](#)

Pay bills

AutoPay

Transfers

Rates enquiry

Services

Statements / Advices

Access and Security

▶ Activity Log

▶ Create New User

▶ View / Change / Delete User

Account Control Setup and Change

Authorisation

Contact centre

Trade Services

Log off

Account control

To view details, click on the Account name.

Account Name	Account Number	CCY	Account Control Assigned
CURRENT ACCOUNT	001-123456-001	VND	No

[Help](#)

- ▶ Go to **Access and Security >Account Control**.
- ▶ Initially, the 'Account Control Assigned' to Primary User(s) status will be displayed as 'No'. Click on the **Account Name** you wish to set up.

Initial setup

B. Set up account control limits

Step 2

Accounts Print | Tiếng Việt

Pay bills

AutoPay

Transfers

Rates enquiry

Services

Statements / Advices

Access and Security

- ▶ Activity Log
- ▶ Create New User
- ▶ View / Change / Delete User

Account Control Setup and Change

Authorisation

Contact centre

Trade Services

Log off

[No new messages](#)

Account control Setup / Change

Authorised signatures are listed in the two Signature Groups - A and B. A double signature indicates dual authorisation requirements on a transaction for amounts up to the specified. A single signatures indicates a sole authorisation requirement on a transaction for amounts up to the limit specified.

[Help](#)

Account : CURRENT ACCOUNTS, 001-003094-001, VND

Existing Users	Signature Group
XXXXXXXXXX	A

All Transaction Amount up to (VND)	Signature Required	Transfers and Term Deposit Amount up to (VND) - if different
<input type="text" value="1,000"/>	A	<input type="text" value="1,000"/>
<input type="text" value="1,000"/>	B	<input type="text" value="1,000"/>

Same Account Control to apply for all accounts of the same type?

- ▶ Input the desired daily limits (should not be greater than company's limits)
 - ▶ The left column are limits for all types of transactions
 - ▶ The right column are limits for linked account transfer and open new time deposit only (if leave blank, they will be the same as the left column)
- ▶ Click **Proceed** to continue.

Initial setup

B. Set up account control limits

Step 2

All Transaction Amount up to (VND)	Signature Required	Transfers and Term Deposit Amount up to (VND) - if different
<input type="text"/>	A	<input type="text"/>
<input type="text"/>	B	<input type="text"/>
<input type="text"/>	AB	<input type="text"/>
<input type="text"/>	AA	<input type="text"/>
<input type="text"/>	BB	<input type="text"/>

Same Account Control to apply for all accounts of the same type?

No

- ▶ How to set up the account control limits:
 - ▶ Limit for A must be equal to or less than AB, AA (if any)
 - ▶ Limit for B must be equal to or less than AB, BB (if any)
 - ▶ All limits have to be less than Company combined limit (Total transaction limit)
 - ▶ Limits in the left column is for all transaction
 - ▶ If you want to set a different limit for linked account transfer and time deposit, input the desired limit in the right column. If blank, these limits are copied from the left column.
- ▶ Click “Proceed” to continue

Initial setup

B. Set up account control limits

Step 3

Accounts ✉ [No new messages](#) [Print](#) [Tiếng Việt](#)

Pay bills

AutoPay

Transfers

Rates enquiry

Services | [Help](#)

Statements / Advices

Access and Security

- Activity Log
- Create New User
- View / Change / Delete User

Account Control Setup and Change

Authorisation

Contact centre

Log off

Account control

To view details, click on the Account name.

Account : CURRENT ACCOUNTS, 001-123456-001, VND

Existing Users	Signature Group
XXXXXXXXXXXXXXXXXX	A

All Transaction Amount up to (VND)	Signature Required	Transfers and Term Deposit Amount up to (VND) - if different
10,000,000	A	10,000,000
10,000,000	B	10,000,000

Same Account Control to apply for all accounts of the same type? No

► Click **'Confirm'**.


Initial setup

B. Set up account control limits

Step 4

Please enter your security code from the security token

Enter security code:



The image shows a black, oval-shaped HSBC security token with a small LCD screen displaying a 6-digit security code. An orange arrow points from the text 'security code' to the screen. The HSBC logo is visible on the top left of the device.

Confirm Cancel

- ▶ Key in the 6-digit security code generated by the Security Device.
- ▶ Click 'Confirm' to complete.

Initial setup

B. Set up account control limits

Step 4

Account control Setup / Change - Acknowledgement

| [Help](#)

Account : FLEXIBLE DEPOSIT, 001-018035-041, VND

Existing Users	Signature Group
ANHSU1	B
SIM TEST COMP3 PU1	A
SIM TEST COMP3 PU2	A

All Transaction Amount up to (VND)	Signature Required	Transfers and Term Deposit Amount up to (VND) - if different
10	A	10
20	B	20
30	AB	30

- ▶ The Account control Setup/ Change – Acknowledgement page is displayed.
- ▶ If the company has dual administrative control, please ask the other Primary User to approve the pending authorization instruction to effect the setup.