



FAQ on HSBC Smart Solution

About HSBC Smart Solution

1. **What is HSBC Smart Solution?**

The HSBC Smart Solution helps you to connect your business apps with HSBC for easy automation and financial management. Simply log on using your Business Internet Banking profile. You can access tools to help you streamline your processes, giving you better control of your company while enabling you to focus on growing your business.

2. **Is it safe to connect my apps with HSBC?**

Yes. The portal has been built to include advanced security and data protection features, to make sure you're protected 24/7.

3. **How much does it cost?**

You can use the platform for free. We will let you know if this changes. However, you may still need to pay for any services provided by your other business apps.

4. **What software do I need to use the portal?**

You don't need any special software to use the platform. The service is available for internet-enabled PC and Mac computers.

To ensure secure and smooth access to our services, if your web browser is Internet Explorer 10 or an earlier version, we recommend that you:

- use the latest version of Google Chrome for an optimal viewing experience; or
- update your web browser to the latest version of Microsoft Edge, Internet Explorer, Firefox or Safari.

5. **The error message 'No eligible accounts found' was displayed when I tried to access the service. What should I do?**

The error message is displayed because your profile is not linked to any accounts that are eligible for this service. Please log on using another Business Internet Banking profile that allows you to view at least one current or savings account (not including Passbook savings accounts, accounts with no transactions in the last 60 days and accounts in currencies other than HKD, USD, CNY, EUR, GBP, JPY, AUD, CAD, CHF, NZD, SGD and THB).

6. **Where can I find the Payment Reconciliation, Dashboard and Product Centre?**

Simply log on using your Business Internet Banking profile. You can then find Payment Reconciliation (under 'Toolbox'), the Dashboard and the Product Centre in the top menu.

About Payment Reconciliation

1. How do I set up the Payment Reconciliation workflow?

Simply log on to the portal, go to 'Toolbox' and click on 'Payment Reconciliation'. You can then find a step-by-step user guide.

2. How do I input sales orders for Payment Reconciliation?

Simply log on to the portal, go to 'Toolbox' and click on 'Payment Reconciliation'. You can then find a step-by-step user guide.

3. During Step 2.1 and 3.1 of Payment Reconciliation setup, nothing happens after 'Continue' button is clicked. What should I do?

After the 'Continue' button is clicked, a pop-up window will open to direct you to Google. However, if your browser has been set to block pop-up windows, it will not open. We recommend you check the pop-up settings on your browser.

Please refer to your internet browser service provider to learn how to allow pop-ups.

4. Why can't I find my Google Sheet when setting up Payment Reconciliation?

If you do not see your Google Sheet when setting up Payment Reconciliation, please refer to our step-by-step guide to import the spreadsheet again, then click 'Refresh'. Please do not upload an Excel file directly to your Google Drive.

5. What should I do if 'Failed to draft payment request email' appears in the status column?

(1) Your mailbox may be full.

Please check the Gmail storage available for your connected Google account.

(2) Your Google account may be disconnected from Gmail. To reconnect it, please follow the steps below:

1. Go to 'Toolbox'.
2. Click on the 'Configuration' button for the tool.
3. In Step 3.1, 'Connect with Gmail', give permission for the tool to connect with your Google account.
4. Complete and save the tool configuration. Your Google account and tool will now become active again.

After checking the above, follow the steps below to rectify the failed order records:

1. Copy the order details and paste them as a new row, below the last executed record in the same Google Spreadsheet.
2. Assign a new and unique order number to the order record.
3. The system will execute the new order record automatically.

6. **What should I do if 'Failed to draft payment confirmation email' appears in the status column?**

When this happens, your payment has been collected successfully but the payment confirmation email could not be drafted in your Gmail. Please do not insert a new order record in the same Google Spreadsheet.

Instead, check your account balance to verify that you have received the payment. Please contact your customer directly to confirm receipt.

7. **What should I do if 'Duplicated transaction detected' appears in the status column?**

When this message appears, an order record with the same order number has already been processed.

Please assign a new and unique order number to the order record in the same Google Sheet within seven days of the order date. Remember to follow the formatting guidelines in the spreadsheet template when you create a new order number. The system will process the new order record automatically.

8. **What should I do if 'Invalid input in order details' appears in the status column?**

Our system checks the formatting of the data in your Worksheet (e.g., the order number, order date, email address, currency and amount). To ensure that the system can map and process the order details, please download the spreadsheet template and follow the formatting guidelines.

In the same row as the 'invalid input' record in the same Google Sheet, please enter the order details again in the correct format within seven days of the order date. The system will process the new order record details automatically.

To correct an invalid record more than seven days from the order date, please assign a new and unique order number to the order record, then copy the order details and paste them into a new row below the last executed record in the same Google Sheet. The system will then process the new order record automatically.

9. **Why didn't the system process the existing sales order records in my Google Sheet after I set up Payment Reconciliation successfully?**

Our system ignores any existing record on your spreadsheet. Please add new sales orders and their details to your spreadsheet after setting up Payment Reconciliation.

10. **What should I do if 'Invalid merchant ID' appears in the status column?**

To correct the merchant ID, please follow the steps below:

1. Go to 'Toolbox'.
2. Click on the 'Configuration' button for the tool.
3. In Step 1.1 'Collect with HSBC Business Collect', check the merchant ID and amend it if necessary.
4. Complete and save the tool configuration.
5. Check in 'Toolbox' and Apps management to make sure the status of your Google account and tool is active.

11. What should I do if some error messages appear in 'Toolbox' or in the Activity log?

(1) Your Google account may be disconnected from Google Sheets or Gmail. To reconnect it, please follow the steps below:

1. Go to 'Toolbox'.
2. Click on the 'Configuration' button for the tool.
3. In Step 2.1 'Connect with Google Sheets', and Step 3.1 'Connect with Gmail', give permission for the tool to connect with your Google account.
4. Complete and save the tool configuration. Your Google account and tool will now become active again.

(2) Your Google Spreadsheet might have been deleted from your Google account.

To restore the deleted Google Spreadsheet, please retrieve it from the recycle bin on your Google Drive. Then go to 'Toolbox' and click on 'tool details' to reactivate the tool.

Alternatively, you can add a new tool using the deleted spreadsheet.

(3) Your Google Worksheet might have been removed from your Google account.

To replace the Google Sheet, please copy and paste it into the same workbook, using the same name as the sheet that was removed.

Alternatively, you can add a new tool using the deleted worksheet.

(4) Your Merchant ID may be invalid. Please follow the steps below:

1. Go to 'Toolbox'.
2. Click the 'Configuration' button for the tool.
3. In Step 1, 'Collect with HSBC Business Collect', check the merchant ID and amend it if necessary.
4. Complete and save the tool configuration.

(5) FPS Business Collect Service may be temporarily unavailable.

We apologise for any inconvenience that this may cause. Please try again later.

12. Do I subject to any requirement from Google when connecting my Google account in toolbox set up?

You have to give permission for the Gear to connect with your Google account in step 3.1 'Connect with Gmail'. The HSBC Smart Solution use of information received from Gmail APIs will adhere to [Google's Limited Use Requirements](#).

About ERP

1. **How do I connect Microsoft Dynamics 365 Business Central to HSBC Smart Solution?**

Log on to HSBC Smart Solution, go to 'ERP' and click 'Get Started'. You can then follow the on-screen instructions to connect Microsoft Dynamics 365 Business Central to HSBC Smart Solution.

2. **Do I need to pay to connect Microsoft Dynamics 365 Business Central to HSBC Smart Solution?**

Connecting Microsoft Dynamics 365 Business Central to HSBC Smart Solution is currently free of charge.

3. **Do I need to reconnect to Microsoft Dynamics 365 Business Central every time I log on to HSBC Smart Solution?**

You only need to connect Microsoft Dynamics 365 Business Central to HSBC Smart Solution once. Once the connection is completed, the related data for the company you connected will appear on the 'ERP' page on HSBC Smart Solution.

4. **I selected 'WhatsApp' to share some sales invoice or payment journal details, but nothing happens on the page. What should I do?**

Your browser might have been set to block pop-up windows. Try checking the pop-up settings on your browser.

5. **I have tried to share some sales invoice or payment journal details by email, but nothing happens on the page. What should I do?**

Please check that you have opened and logged on to your email application.