

HSBC Smart Solution

Making your business journey easier and smarter –
an innovative platform that connects multiple
business applications to automate your workflow



Together we thrive

What is HSBC Smart Solution?

If you are looking to reach your next business milestone faster, look no further. HSBC Smart Solution is a cloud-based portal that aggregates third party business apps and the HSBC digital banking portal. With this first-to-market solution offered by HSBC, you can streamline operation processes, and manage your finances and business health both seamlessly and holistically.

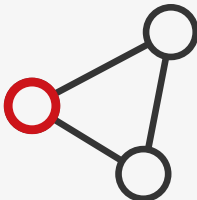
It is open to all Hong Kong HSBC Business Internet Banking users – you can now focus on growing your business story while we take care of the rest.

Why HSBC Smart Solution?



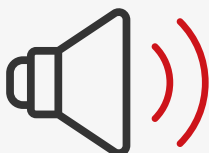
Simpler and smarter operation

Save time on routine tasks with automated workflow



Better connected

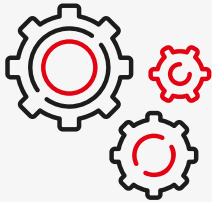
Get business and financial data in real time by integrating both HSBC business accounts and your business apps



Better informed

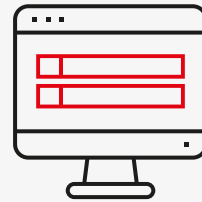
Visualise cash flow and financial information, and receive timely updated information

How can HSBC Smart Solution assist your business?



Toolbox

Link business data from multiple apps to one single platform to automate business processes



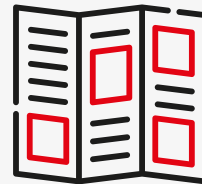
Enterprise Resource Planning Solution (ERP)

Integrate your Microsoft Dynamics 365 Business Central account to check all transaction details and payment due dates in one place



Dashboard

View your bank account data analysed and visualised in graphs and charts



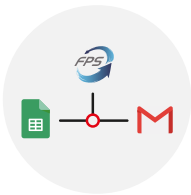
Product Centre

View a comprehensive range of products and offers that suit your business needs



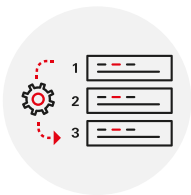
Toolbox

Toolbox is the place that holds different business applications including Google Sheets, HSBC Business Collect and Gmail. You can now automate multiple processes, all in one single platform.



Integrate data

View and manage your data on one single platform by connecting your business data from both HSBC and external apps, with just a few simple steps



Get data synchronised

Automate and streamline your daily business operations to enhance efficiency and service quality



View reconciled records

Get synchronised financial record and transaction history in real time, so you can quickly notice discrepancies and take action faster

Steps to automate your payment reconciliation

You can simplify your payment reconciliation process from the moment you receive an order, to bookkeeping after collecting payment. Scan the QR code to watch the demo video:





Enterprise Resource Planning Solution (ERP)

Gain a clearer view of your business transactions with different parties, all in one single interface. Here you can connect your HSBC business account with Microsoft Dynamics 365 Business Central, so you can integrate core business functions like accounting, sales, logistics and HR to gain better efficiency over your business operations.



View your key transaction details at a glance

Combine your business transaction data from Microsoft Dynamics 365 Business Central and HSBC business account



Stay informed with timely reminders

Manage your cashflow better, without missing a due date for payments or sales invoices



Download record and share

Generate emails with pre-populated transaction details from financial records, and share the information with your team and your vendors for easier follow-up

Scan the QR code to see how ERP can help you manage your account payables and receivables:





Dashboard

Now you can view all your key banking data clearly in graphs and charts, including historical trends and the current position of your accounts and transactions, so you can stay on the same page with your financial status, and react to plot twists and turns faster.



No extra setup is needed

Once you've logged on with your HSBC Business Internet Banking username and password, you'll be able to view all the recent data for your current and savings accounts visualised in graphs and charts



Visualised data

Using a wide range of analysis tools, the Dashboard helps you visualise your day-to-day account movement, transaction patterns, balance breakdown and other data with graphs and charts, giving you a better picture of your financial status



Interactive analysis

Search, filter and sort your banking data to view it in ways that meet your needs, allowing you to monitor overall performance and detailed activities with just a few clicks

Scan the QR code to see how Dashboard can help you oversee your business:





Product Centre

Discover banking and business solutions from HSBC and our partners that best suit your business needs.



View and try out new products

Gain access to a comprehensive range of recommended business products to support your business growth



Special offers at a glance

Make the most of the great deals offered by us and our partners, some are exclusive to HSBC customers; You can even pick a category to search for specific offers

Scan the QR code to see how you can discover business products and offers:



**Learn more and start a brand new chapter of running business now:
business.hsbc.com.hk/en-gb/smart-solution**

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