Hang Seng Business e-Banking User Guide
Investment Services Reminders and e-Alert Setup

Steps for Setting up Investment Services Reminders and e-Alert in Business e-Banking

About Investment Services Reminders and e-Alert

To access investment-related functions, you must provide your latest contact information and set up Investment Services e-Alert to receive SMS and e-mail notifications on login activities and trade alerts.

1. Update Contact Information
Whether you are the Primary or Secondary User, please first provide a valid e-mail address and mobile phone number via web version of Hang Seng Business e-Banking through your desktop or mobile browser.

You can refer to Section A for details, or skip this step if already completed.

2. Complete Investment Services e-Alert Setup
If you are the Primary User, after updating contact information, please ensure your Investment Services e-Alert has been set up properly (i.e. to enable both SMS and e-mail delivery methods) in Hang Seng Business e-Banking.

You can refer to Section B.

*Note:
After you submitted the e-Alert setup instruction, it will typically take effect on the next business day. You can still start using the investment-related functions during this period, but you will not receive reminders or e-Alert by e-mail or SMS.

Before your e-Alert instruction takes effect, if you need to check the status after you placed an order, please go to Order Status in the Business Mobile App or Notifications in the web version of Business e-Banking.

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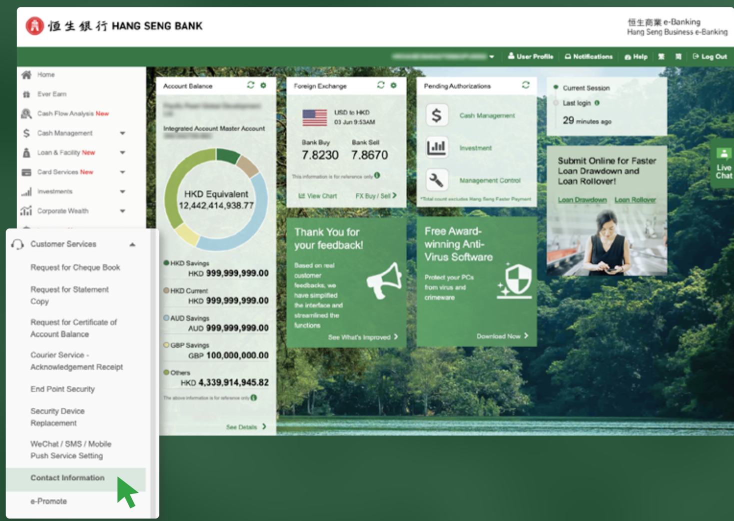
Section A: Provide Your Contact Information

STEP 1 Open the Page

Click **Customer Services** > **Contact information** on the side menu after logging in to Business e-Banking.

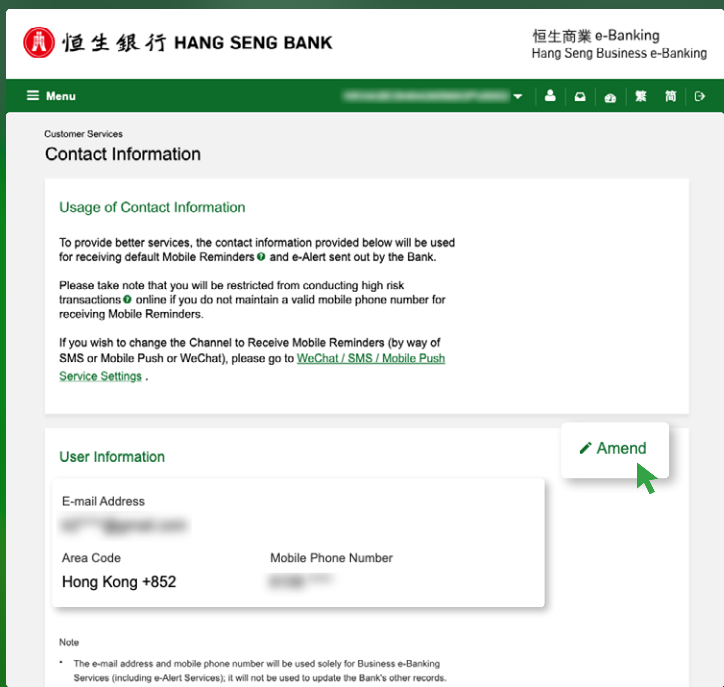


STEP 2 Review and Update the Information

Review your e-mail address and mobile phone number under **User Information**, and click **Amend** to make any necessary updates.

If the fields are empty, please enter your latest contact details.

After you update your information, you will receive Mobile Reminders when you access an investment-related function page.



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Section B: Complete Investment Services e-Alert Setup

Important Reminder

Investment Service e-Alert (covering both SMS and e-mail delivery methods) is automatically enabled when an investment account is activated or a new Primary User is created. Please check whether there is any existing Investment Service e-Alert record in place before selecting your action (to set up or to amend).

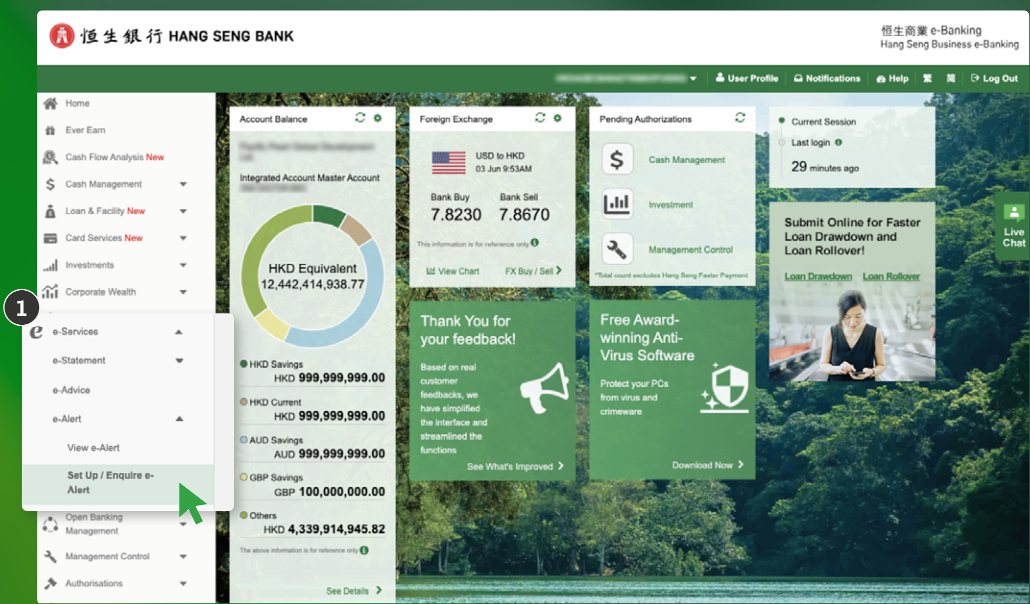
STEP 1

Open the Page

1. From the side menu on the left, navigate to e-Services > e-Alert > Set Up / Enquire e-Alert.

2. Select your action:

   - To set up new Investment Services e-Alert, proceed to Step 2A.
   - To amend your existing Investment Services e-Alert, proceed to Step 2B.



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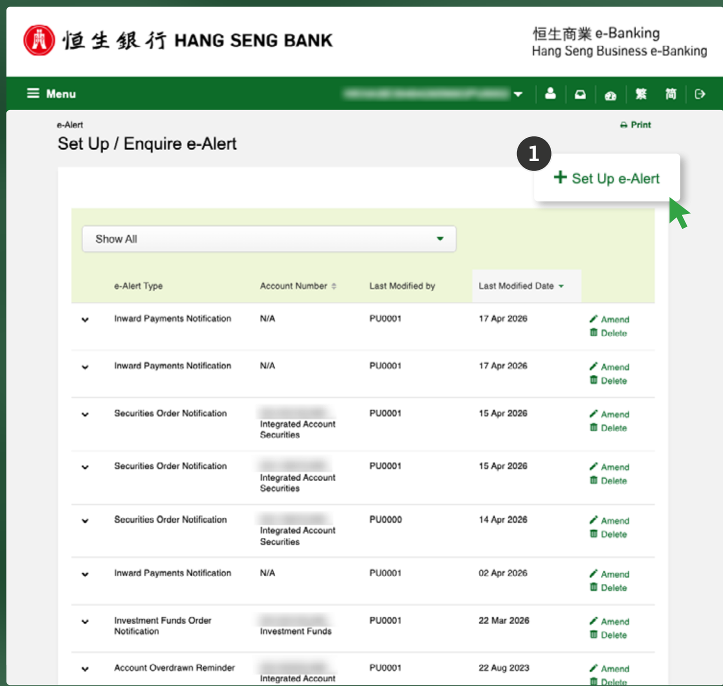
Section B: Complete Investment Services e-Alert Setup

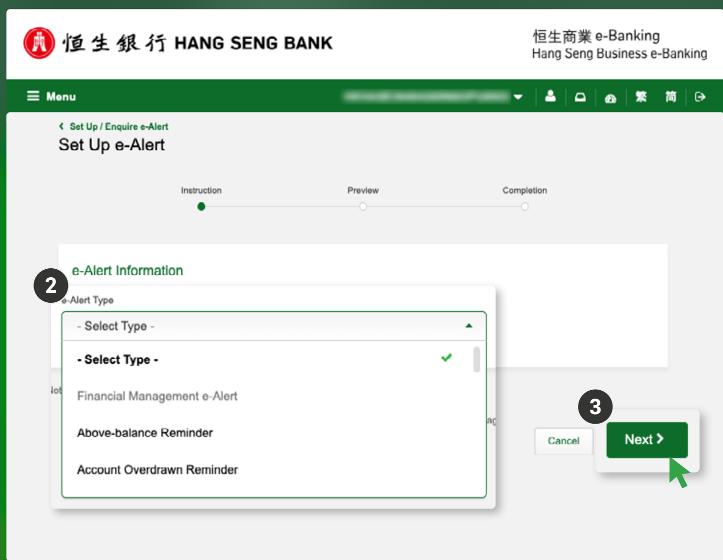
STEP 2A Set Up New Investment Services e-Alert

1. Click **+ Set Up e-Alert**.

2. Under **e-Alert Type**, select your preferred **Investment Services e-Alert type** (i.e. Investment Funds Order Notification and/or Securities Order Notification).

3. Click **Next** to proceed.





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Section B: Complete Investment Services e-Alert Setup

STEP 2A

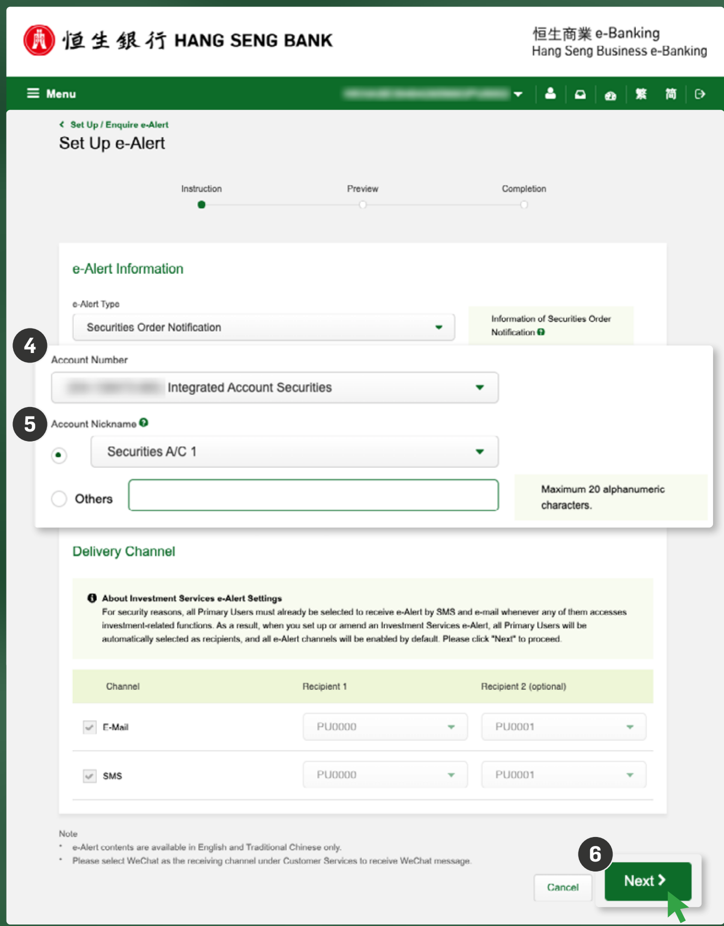
Set Up New Investment Services e-Alert

4. Choose your **Account Number**.

5. Select an **Account Nickname** or select **Other** to customise a new name.

6. Click **Next** to proceed.

*Note:
For security reasons, all Primary Users must already be selected to receive e-Alert by SMS and e-mail. Therefore, all Primary Users are automatically selected as recipients, and all e-Alert channels are enabled by default.



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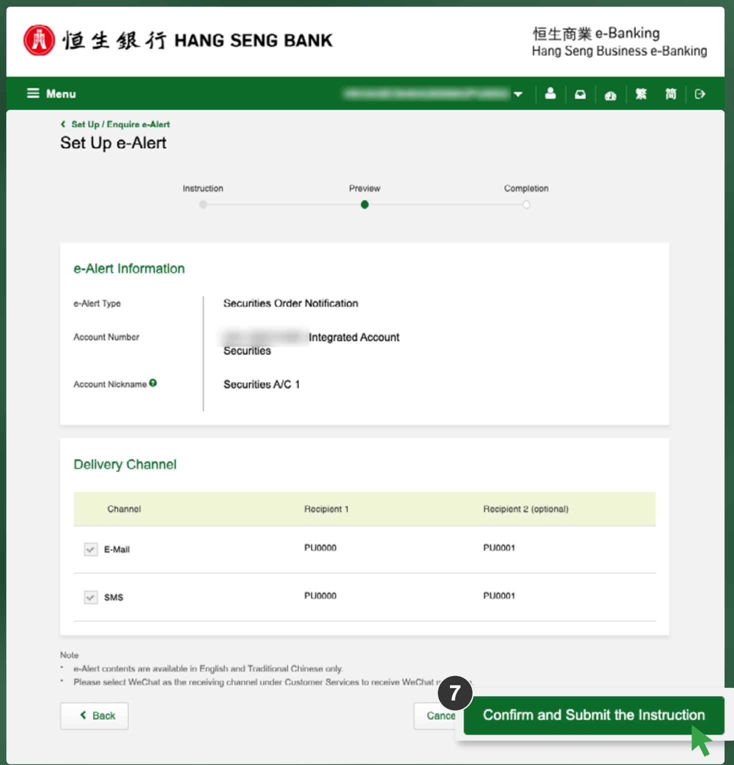
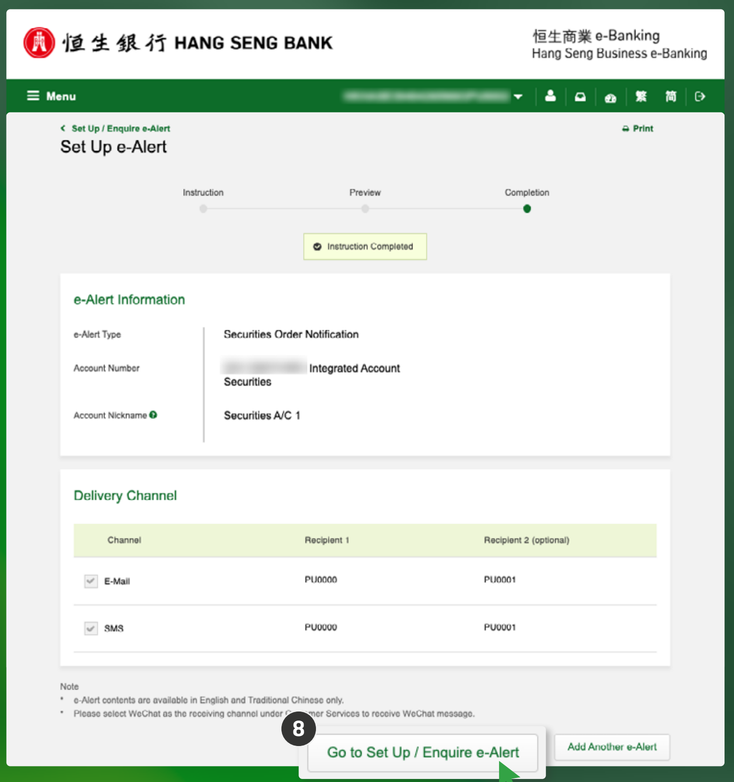
STEP 2A Set Up New Investment Services e-Alert

7 Review and click **Confirm and Submit the Instruction**.

8 The setup is completed. You can click **Go to Set Up / Enquire e-Alert** to view your e-Alert records.

*Note:
If there is duplicated e-Alert setup, you will receive duplicated notification for an activity. Therefore, please ensure only **ONE** e-Alert is active for each Investment Service notification type (i.e. Investment Funds Order Notification and/or Securities Order Notification) under each Investment Account.





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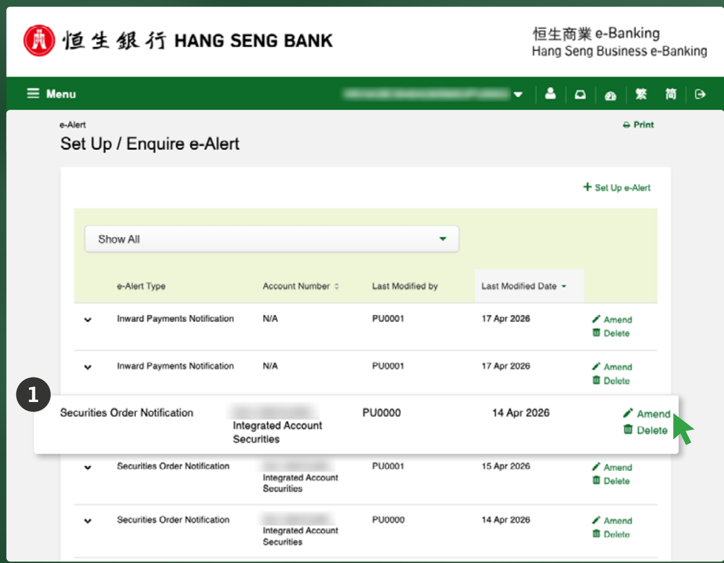
Section B: Complete Investment Services e-Alert Setup

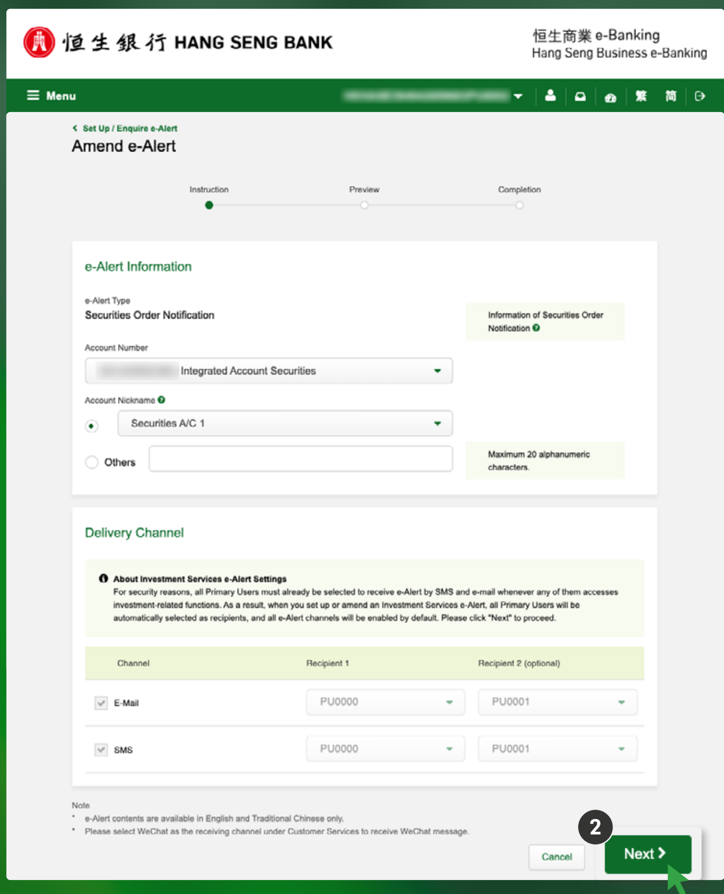
STEP 2B Amend Existing Investment Services e-Alert

For security reasons, all Primary Users should be selected to receive Investment Services e-Alert by **both SMS and e-mail**. Therefore, you will need to amend your existing e-Alert instruction to enable all delivery channels if you have not done so.

1. Click **Amend** on an existing Investment Services e-Alert record.

2. All e-Alert channels are selected by default. Click **Next** to proceed.





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STEP 2B Amend Existing Investment Services e-Alert

3 Review and click **Confirm and Submit the Instruction**.

4 The setup is completed. You can click **Go to Set Up / Enquire e-Alert** to view your e-Alert records.

*Note:
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