



How program
administrators
can use HSBC
CentreSuite Mobile

How to:

[1. Sign in and register](#)

[2. Manage teams](#)

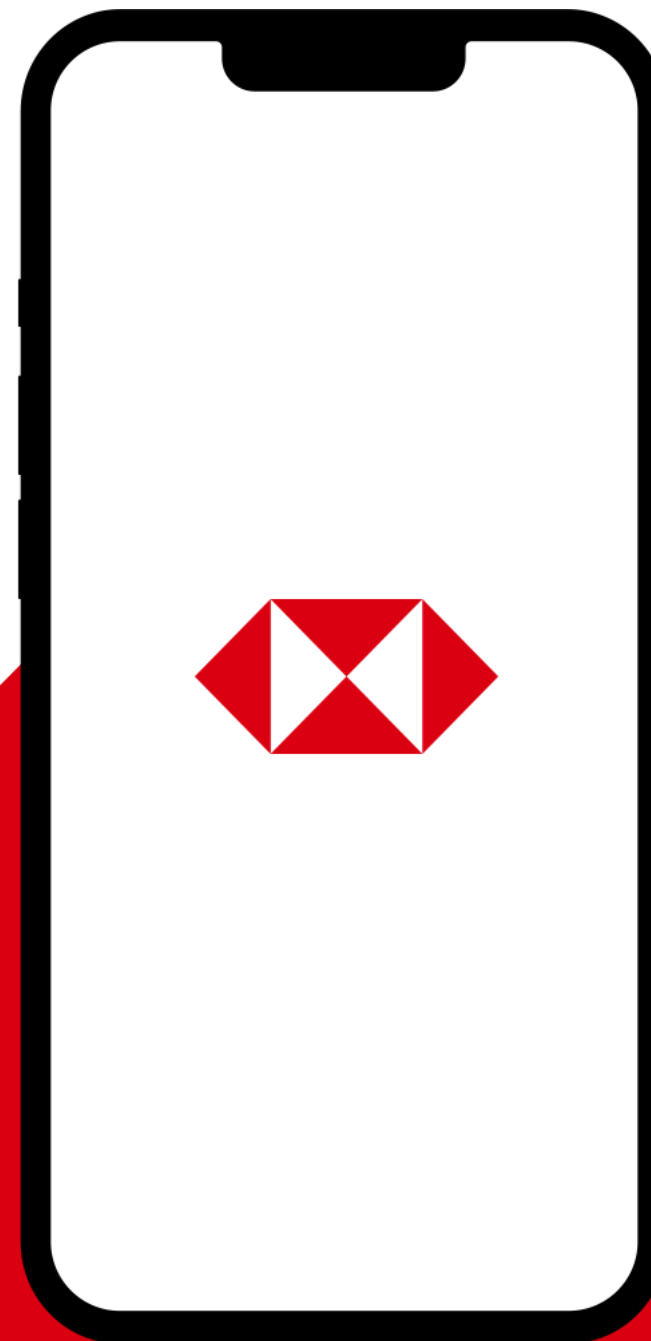
- [Manage spend controls](#)

- [View account](#)

- [View transactions
and statements](#)

[3. Manage payments](#)

[4. Reset passwords
and unlock accounts](#)



How to:

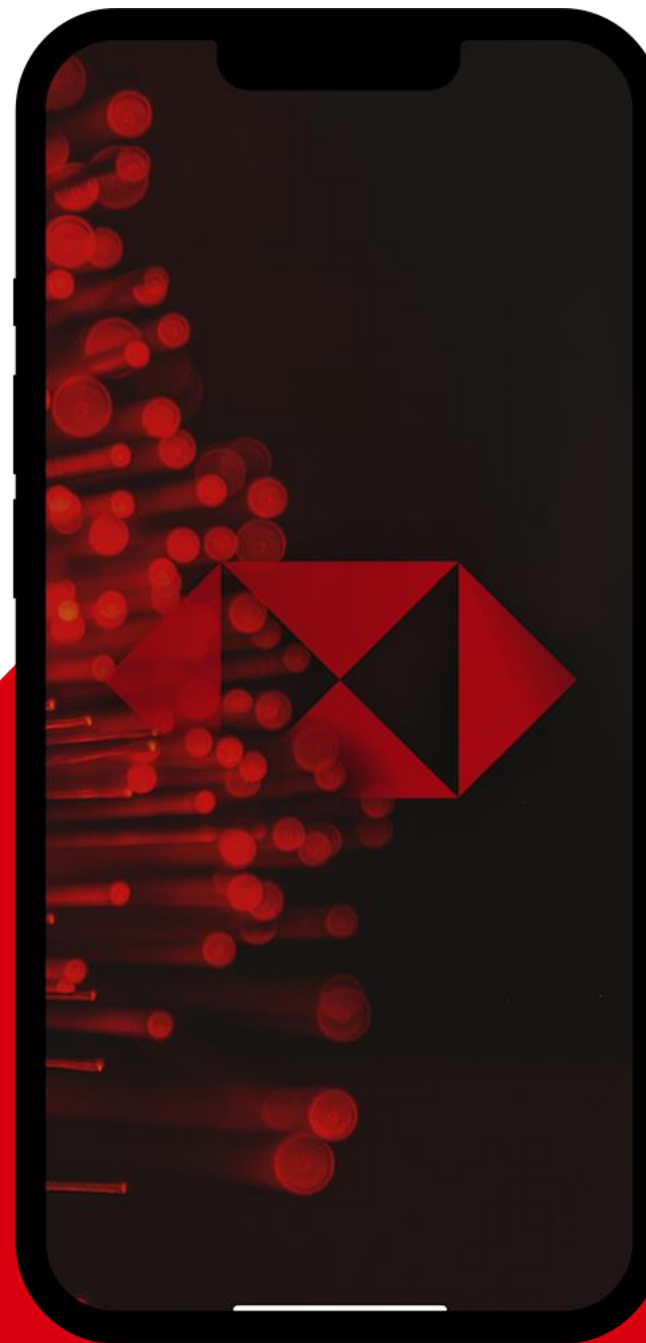
1. Sign in and register

2. Manage teams

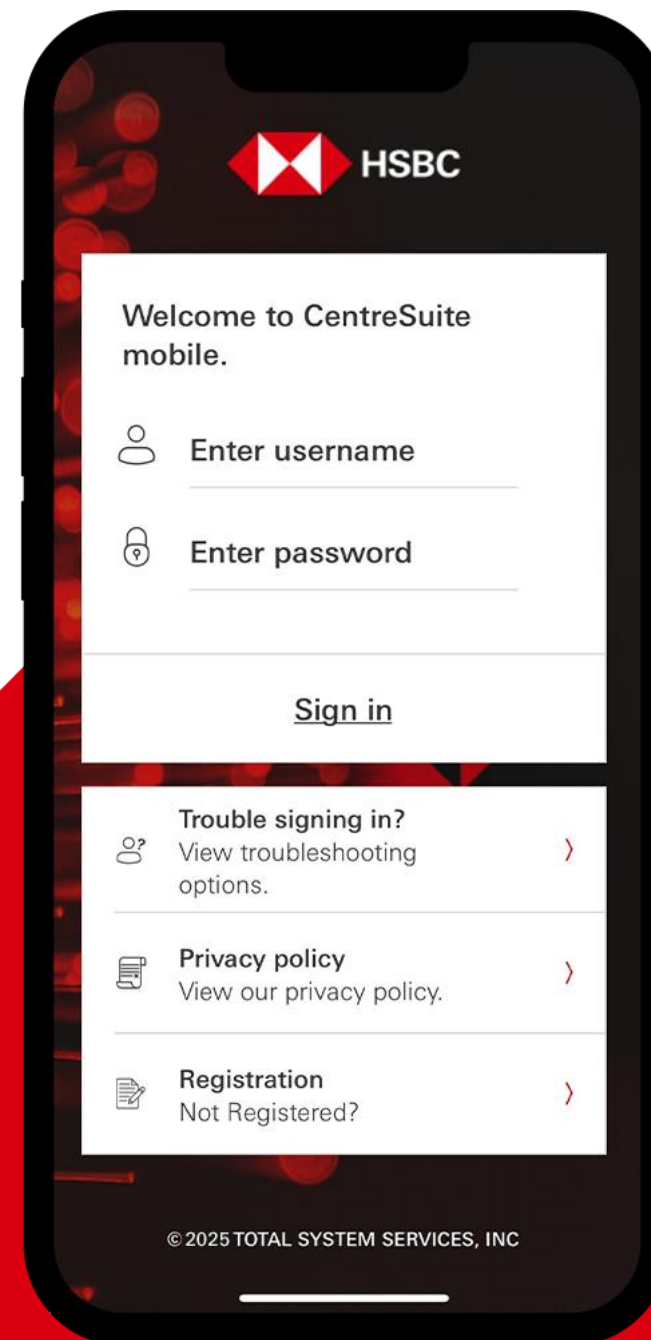
- Manage spend controls
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3. Manage payments

4. Reset passwords and unlock accounts

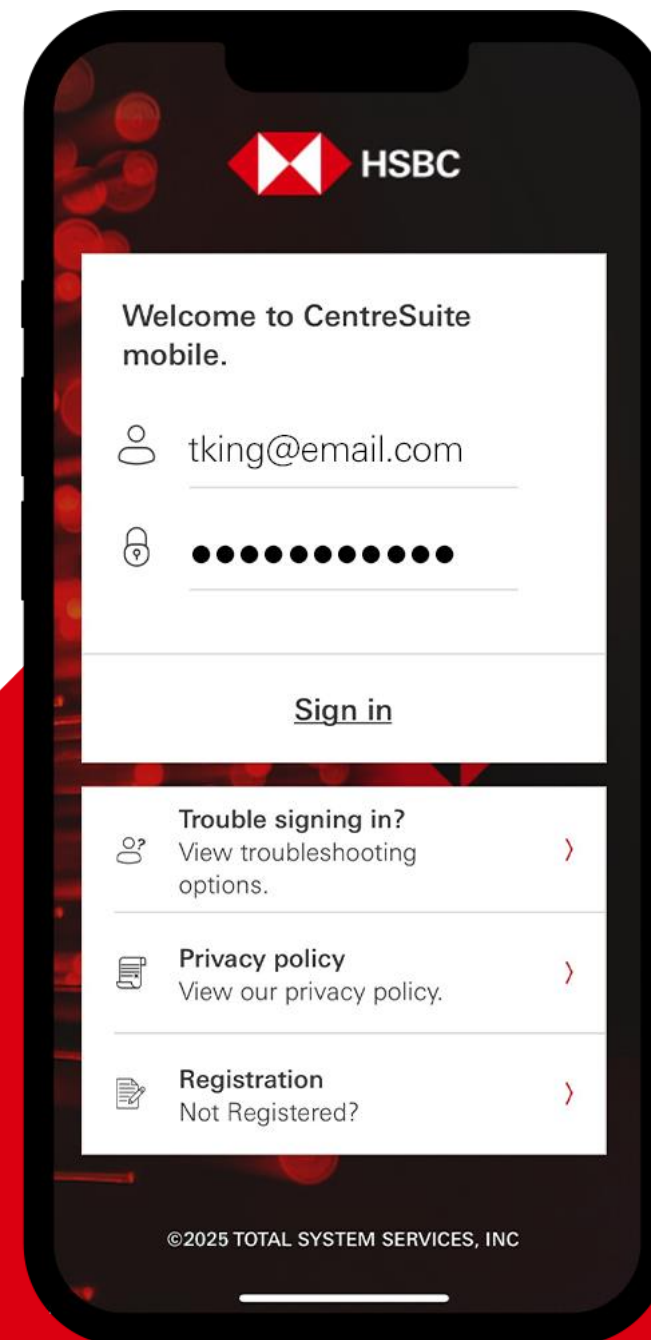


Open the HSBC CentreSuite
Mobile app on your phone.



Open the HSBC CentreSuite
Mobile app on your phone.

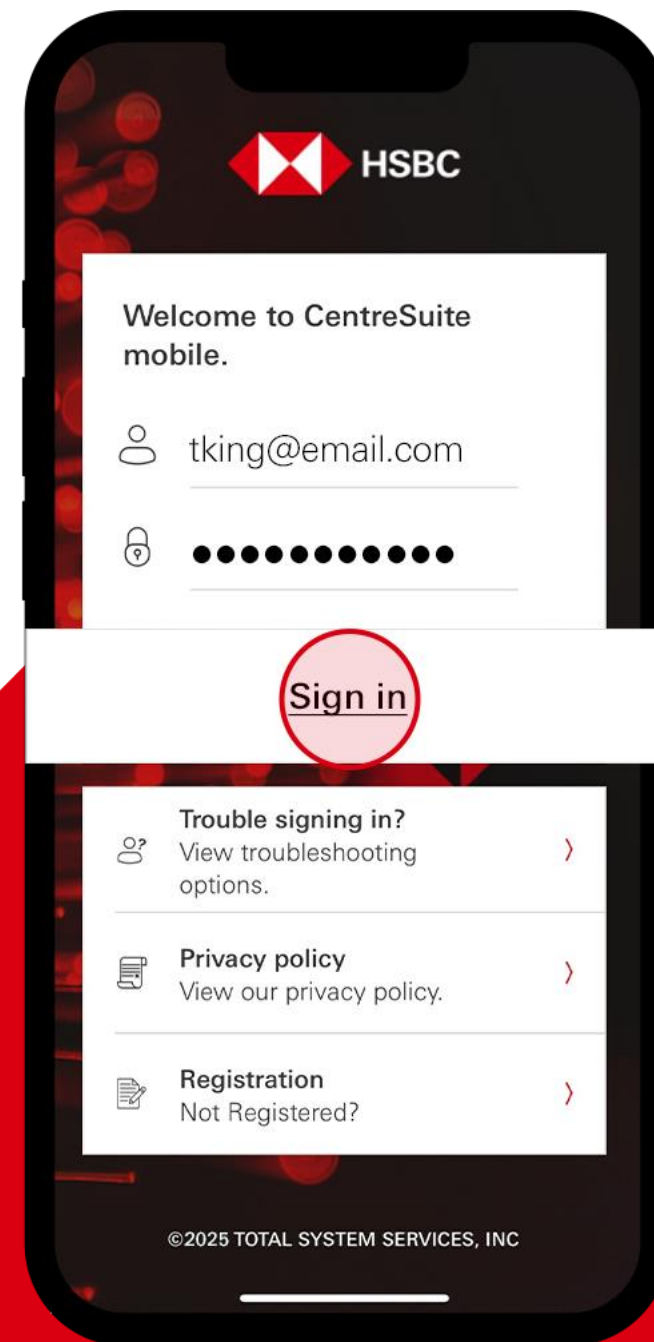
Enter your CentreSuite
username and password.



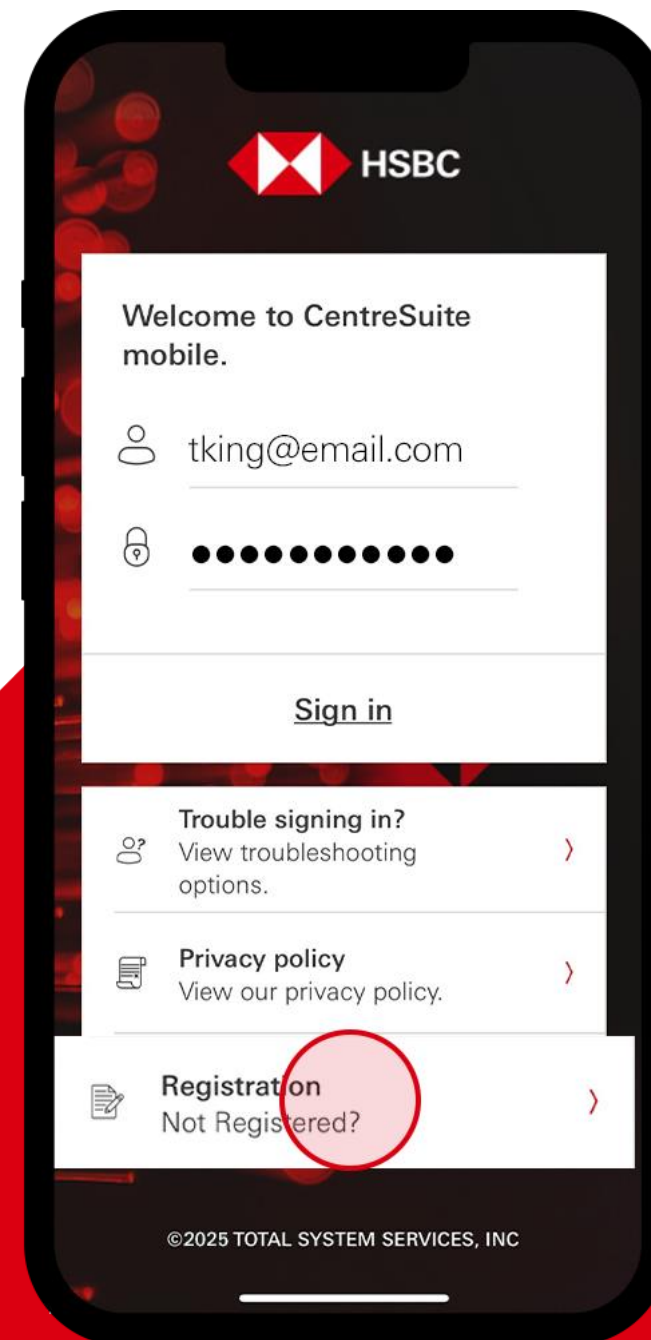
Open the HSBC CentreSuite
Mobile app on your phone.

Enter your CentreSuite
username and password.

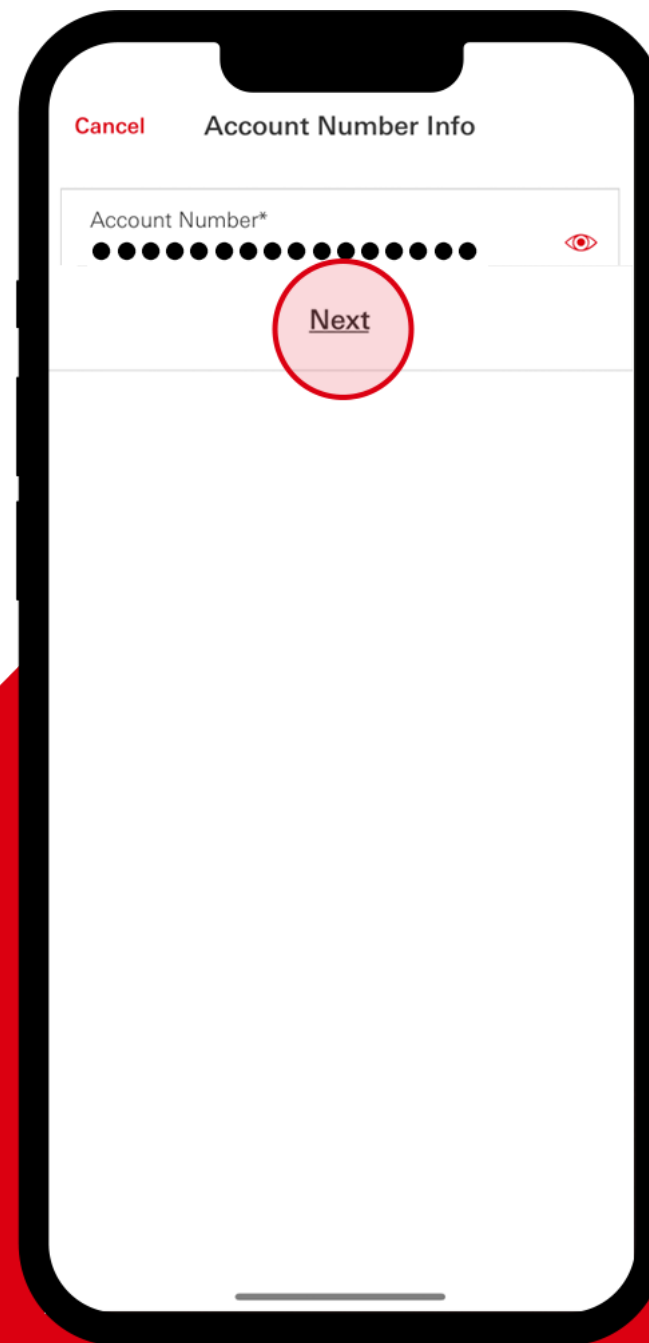
Tap “Sign in.”



If you haven't registered for CentreSuite, select "Registration."



Enter full 16-digit
corporate account number
and select “Next.”



Enter all required details
and select “Next.”

Username must contain
at least one capital letter
and a number.

Passwords must contain
at least one capital letter,
a number, and a special
character.

A screenshot of a mobile application interface for creating a profile. The screen is titled "Create Profile" with a "Cancel" button in the top left. A progress indicator shows "1 / 3" with a red circle around the first step, and "Step 1" is displayed in the top right. The main heading is "Create a user ID and password". Below this, there are several input fields: "Your Email Address*" with the placeholder "Enter Your Email Address", "Confirm Your Email Address*" with the placeholder "Re-enter Your Email Address", "Mobile phone" with a red chevron icon to its right and the text "Add mobile phone" below it, "First Name*" with the placeholder "Enter First Name", "Last Name*" with the placeholder "Enter Last Name", "Create a Username*" with the placeholder "Enter a Username", "Create a Password*" with the placeholder "Enter a Password", "Confirm Your Password*" with the placeholder "Re-enter Password", and "Your Password Hint*" with the placeholder "Enter a Password Hint". At the bottom, there is a large red circular button with the word "Next" in white text.

Enter additional required details to continue with setup:

1. Name on the corporate card program.
2. Postal/Zip Code.
3. Credit limit assigned to your corporate card program.

Once entered, select "Save."

Authentication questions required for registration are subject to change.

A smartphone screen displaying the HSBC mobile app's registration process. At the top, there's a 'Cancel' button and the title 'Register an Account'. Below the title is a progress indicator showing '2 / 3' and 'Step 2'. The main heading is 'Register an existing account'. The form contains four fields: 'Account Number' with the value '...4343', 'Name On Account*' with the placeholder 'Enter Name On Account', 'Postal/Zip Code*' with the placeholder 'Postal/Zip Code', and 'Corporate Credit Limit*' with the value '\$0.00'. At the bottom of the form is a red circular button with the text 'Save'.

Confirm if your account details are correct.

Then select “Continue.”

If you have multiple corporate card accounts, you may contact the Bank to link them to a single CentreSuite login ID.

A smartphone screen displaying the "Account Registered" confirmation screen. At the top, it says "Account Registered". Below this, there is a progress indicator "3 / 3" inside a red circle, and "Step 3" to its right. The screen is divided into sections for "Account information". The first section contains "Email Address" with the value "tking@email.com". The second section contains "Full Name" with the value "Todd King". The third section contains "Username" with the value "tking@email.com". The fourth section contains "Registered Account Number" with the value "...4343". At the bottom, there are two buttons: "Continue" (highlighted with a red circle) and "Back to Sign In".

Account Registered

3 / 3 Step 3

Account information

Email Address
tking@email.com

Full Name
Todd King

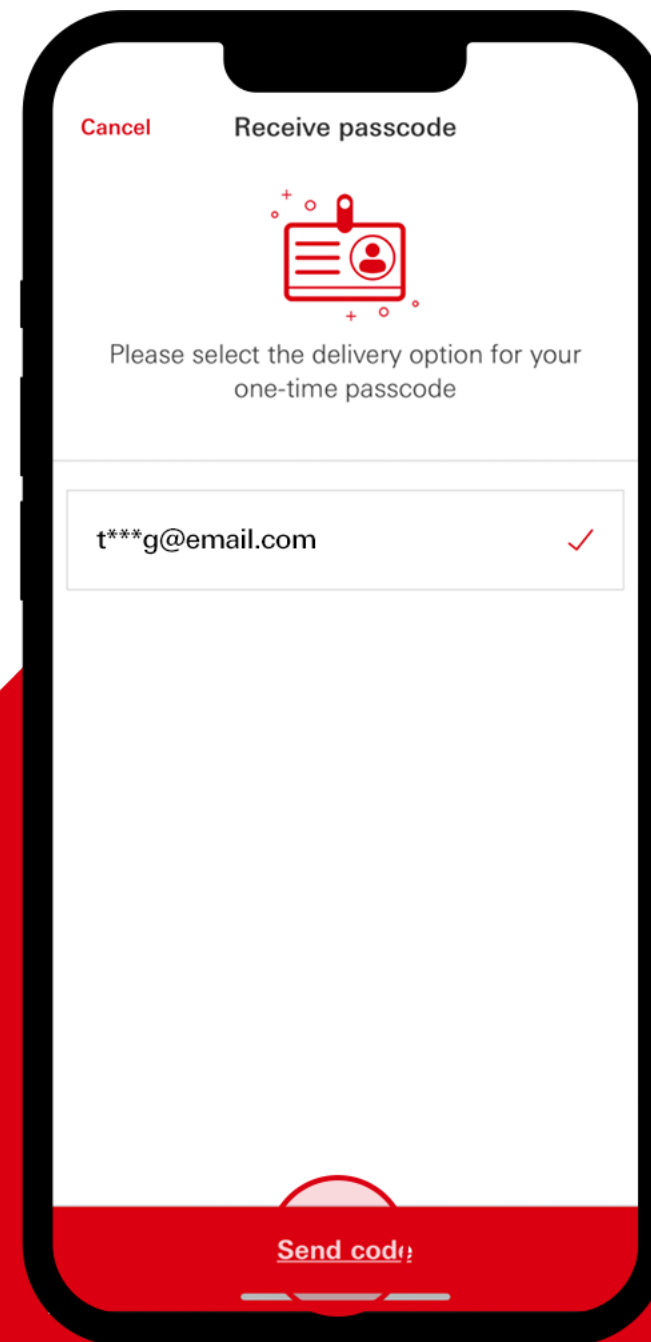
Username
tking@email.com

Registered Account Number
...4343

Continue

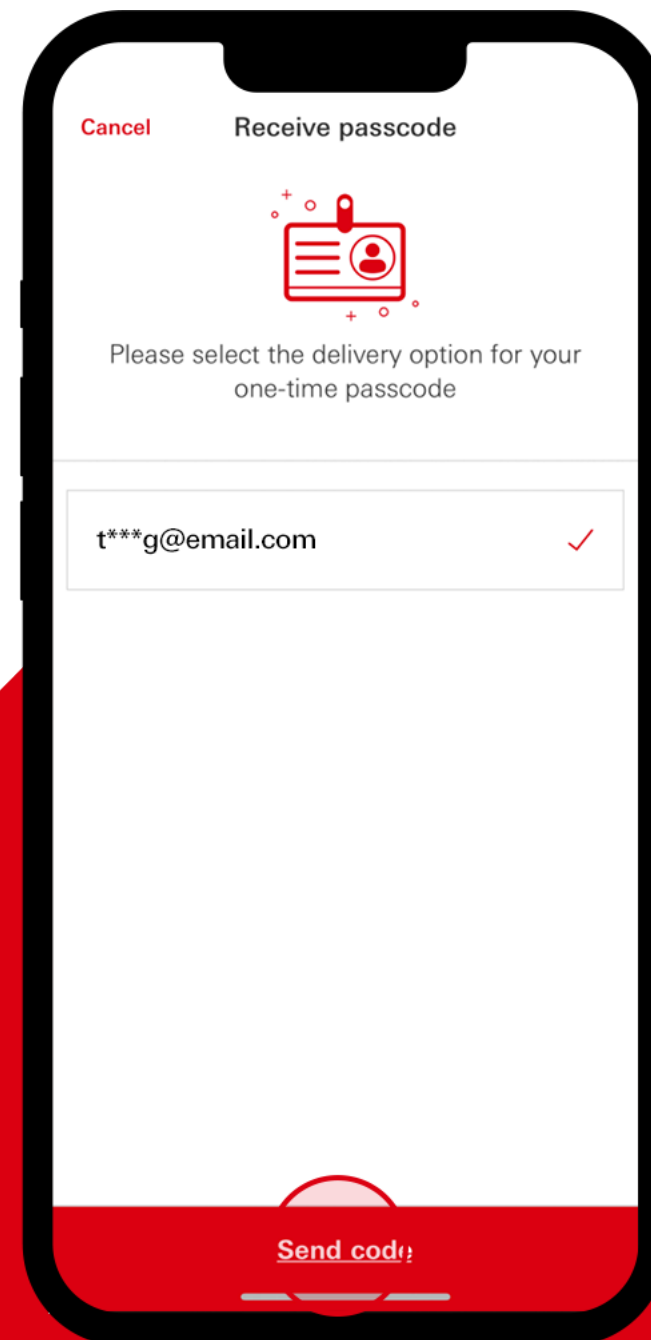
Back to Sign In

Once “Continue” is selected, your email address will be presented for the OTP (one-time passcode) to be sent so you can log in. Select “Send code.”



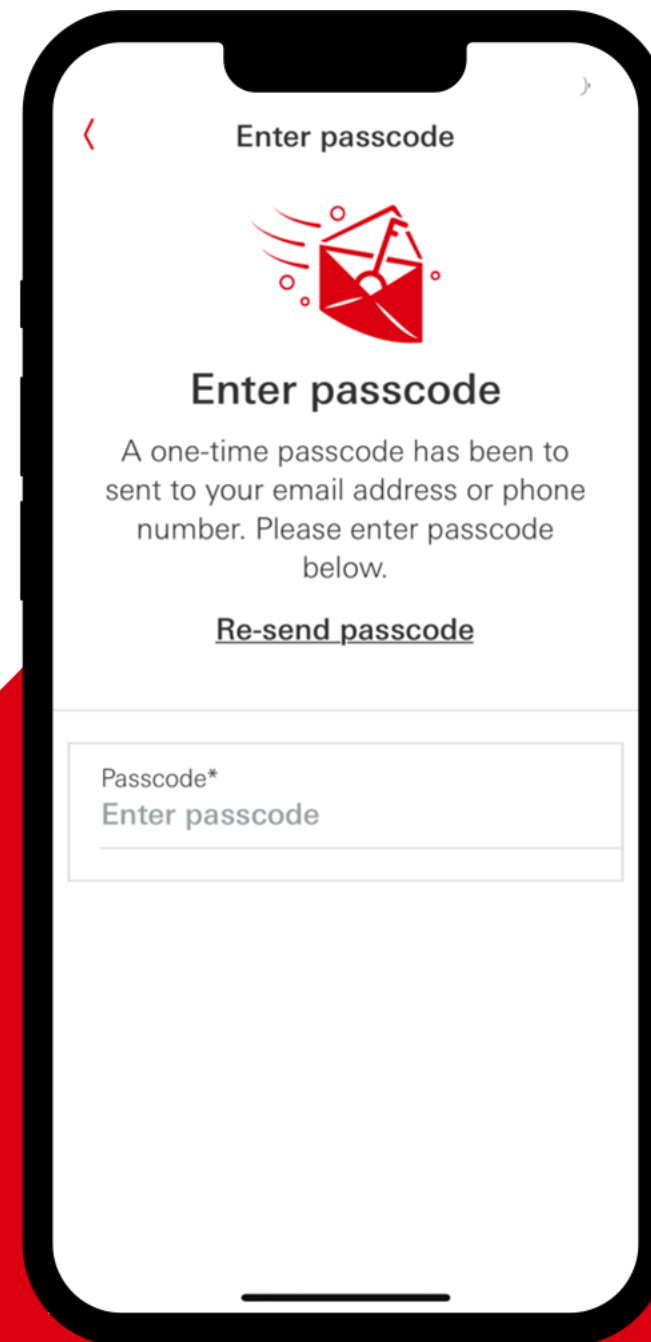
Check your email for the
one-time passcode.

A new screen will be presented
for you to enter the code.

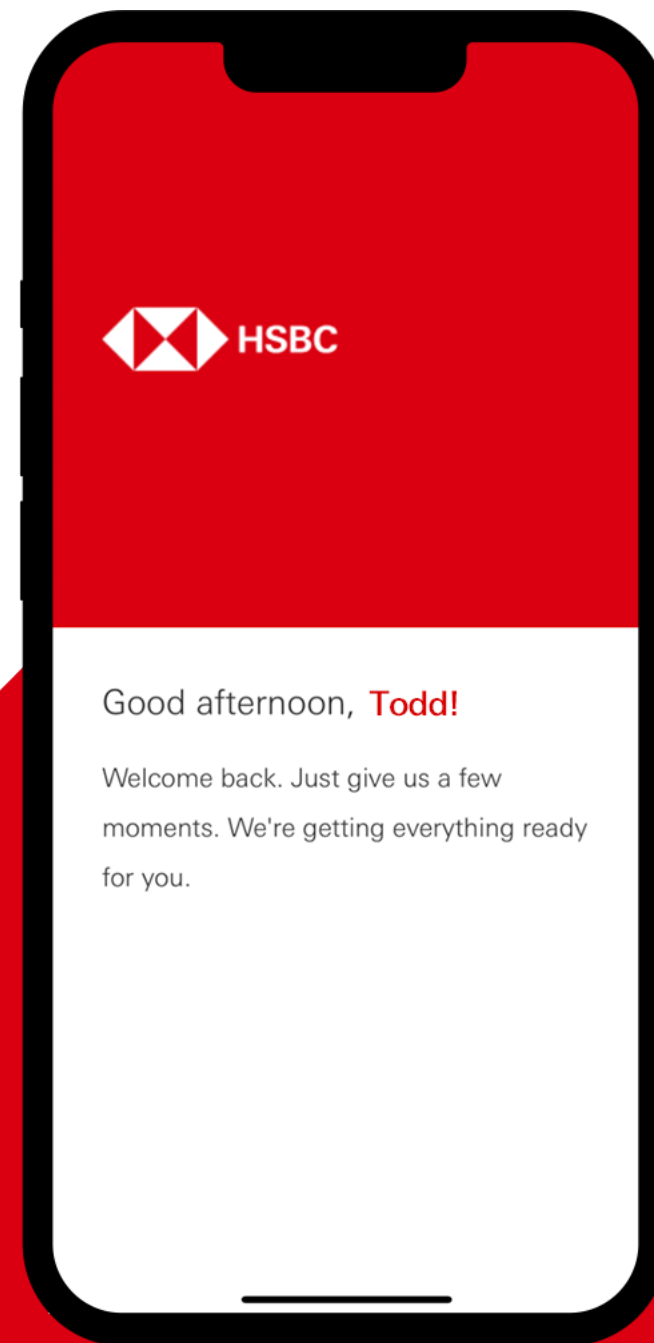


Enter the one-time passcode
from your email.

When the last digit is entered,
you will automatically be taken
to the welcome screen.

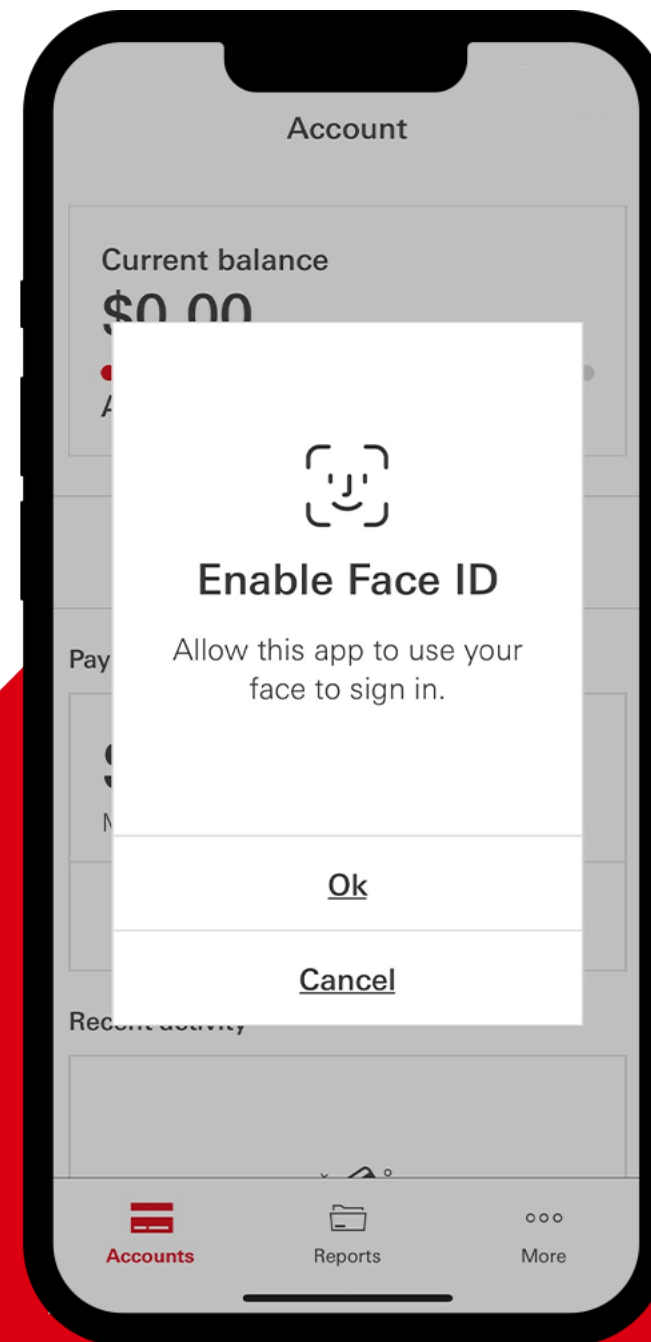


Once the code is accepted,
CentreSuite will present you
with a welcome message.



You will then be asked if you would like to set up Face ID or Touch ID, depending on your device.

After you make your selection, you'll be able to start using the CentreSuite Mobile app.



How to:

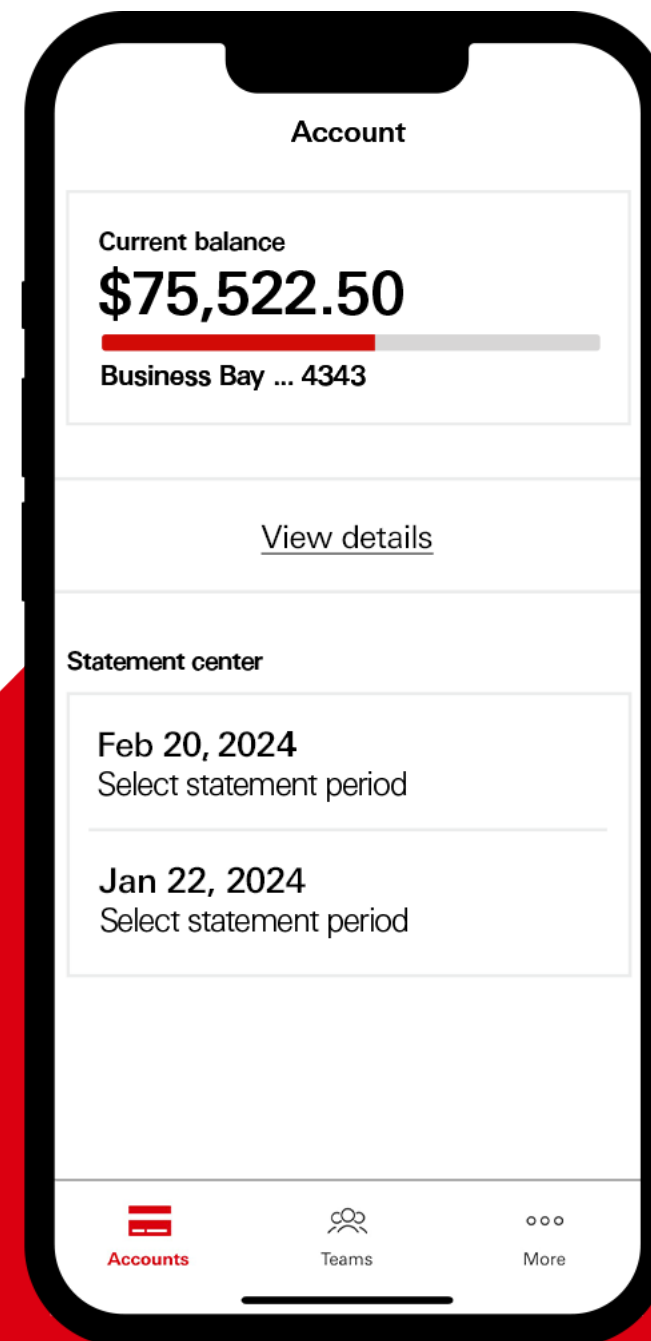
1. Sign in and register

2. Manage teams

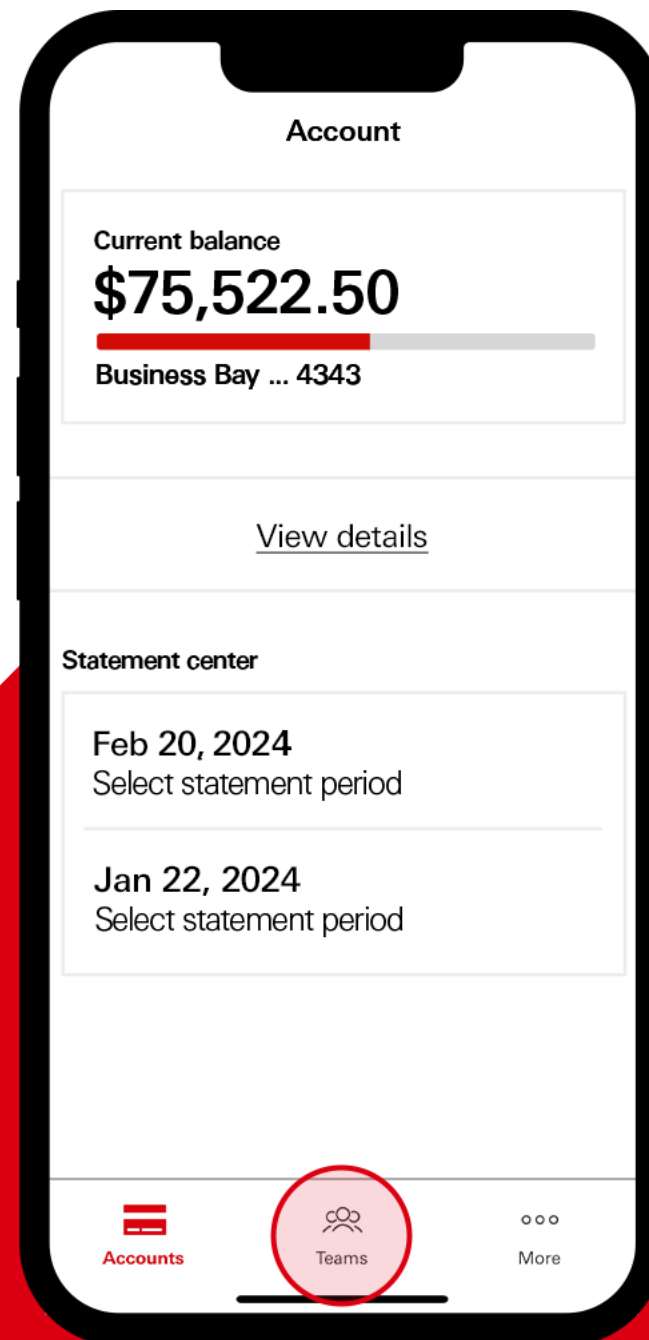
- Manage spend controls
- View account
- View transactions and statements

3. Manage payments

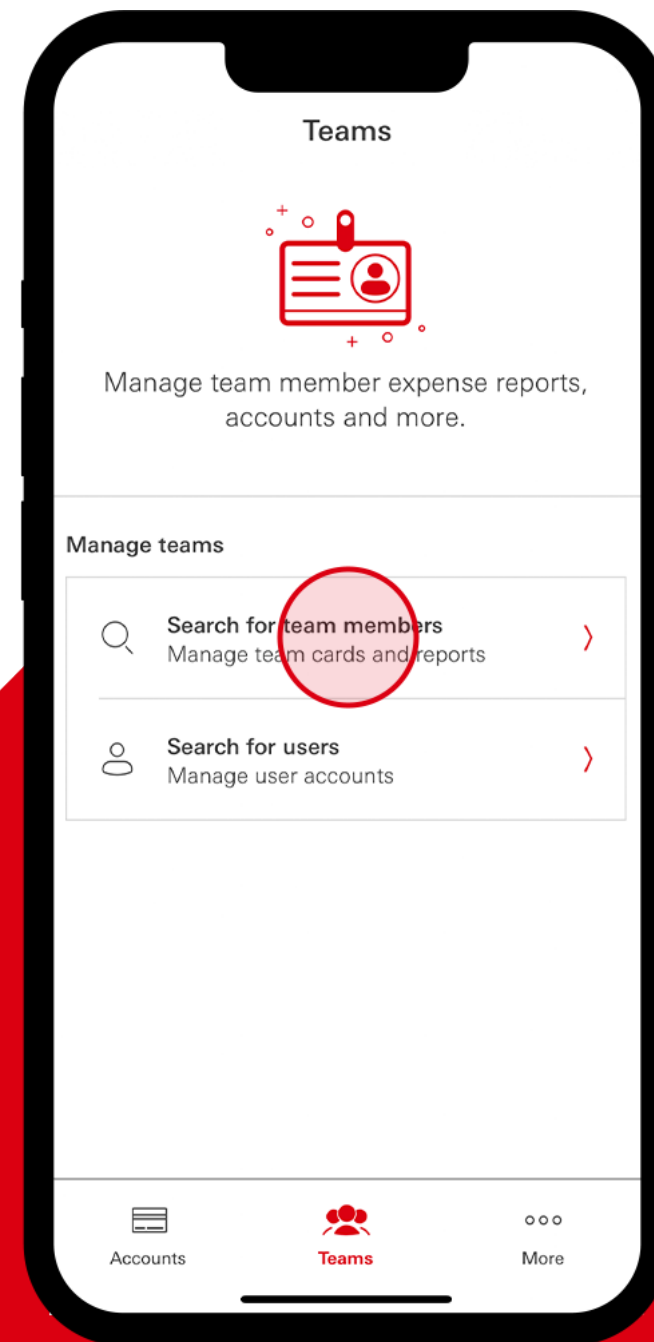
4. Reset passwords and unlock accounts



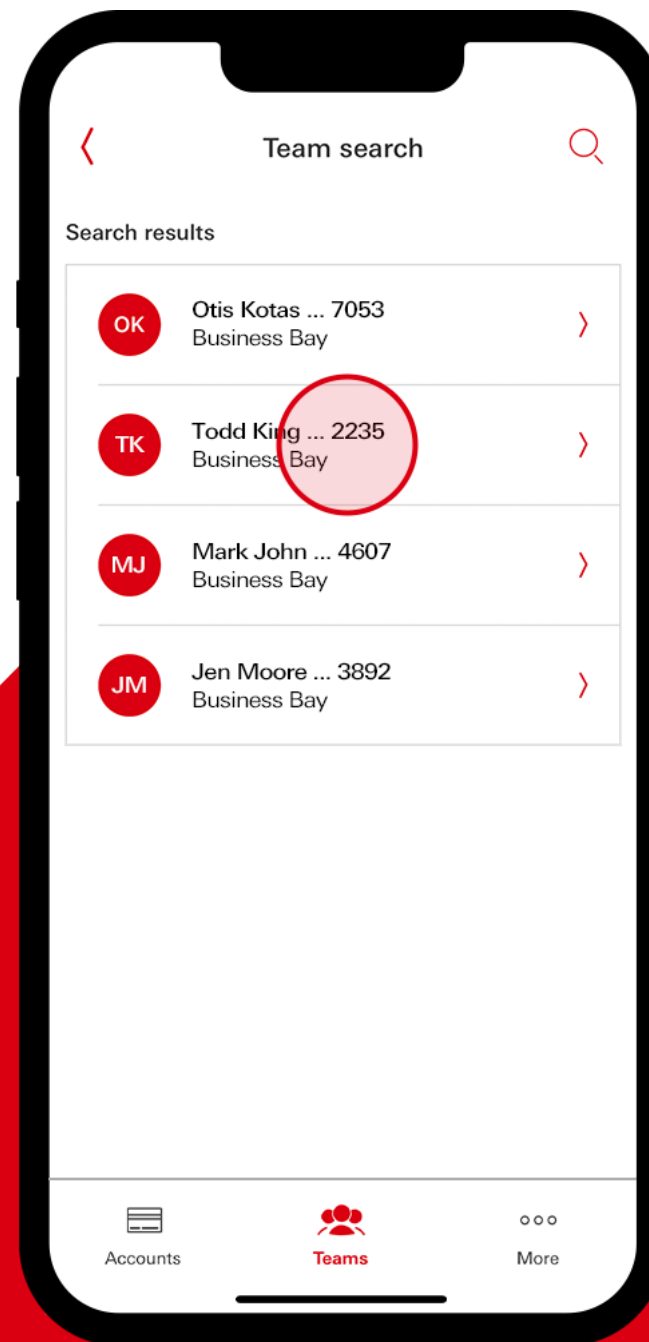
Select the Teams tab at
the bottom of the screen.



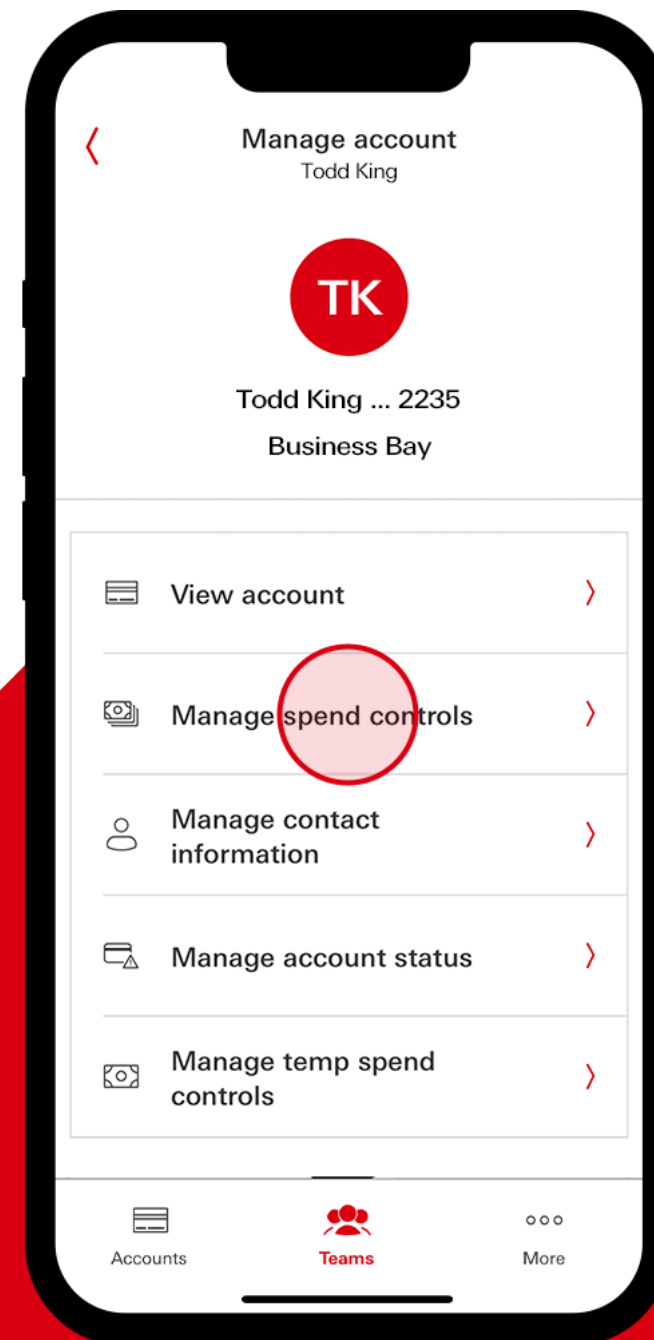
Select the Teams tab at the bottom of the screen.
Select “Search for team members.”



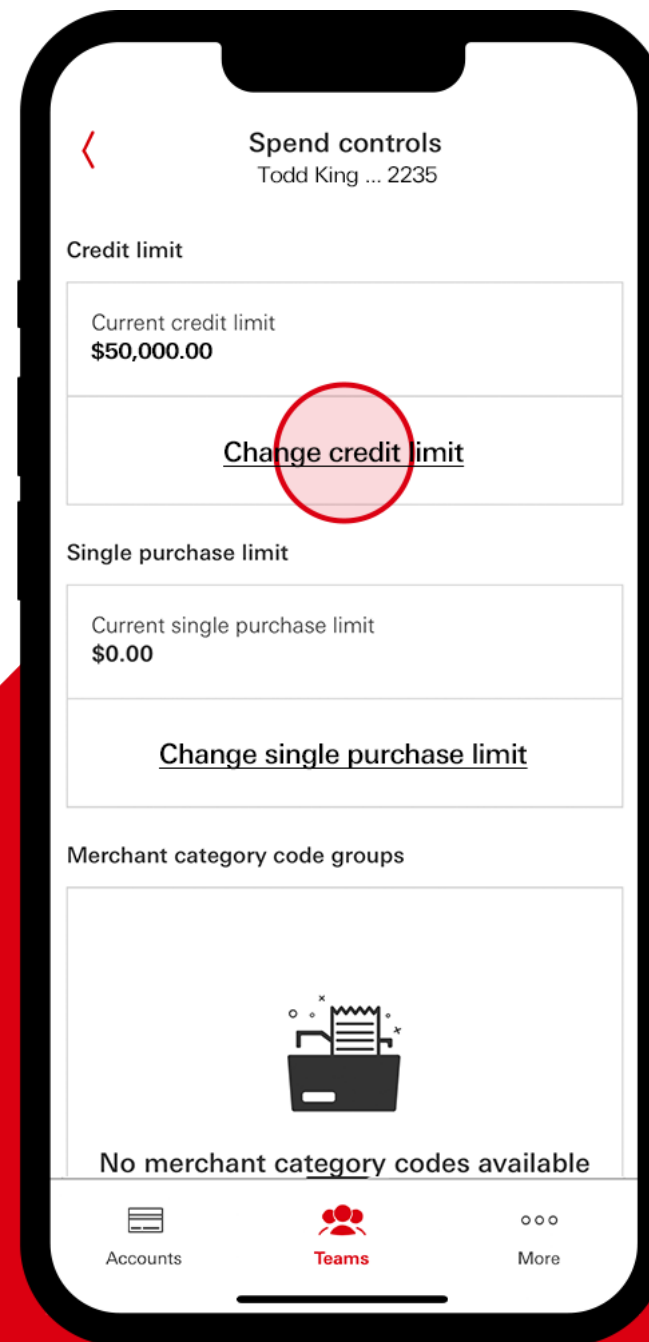
Choose a member of your team
you'd like to view.



Choose a member of your team
you'd like to view.
Select "Manage spend controls."

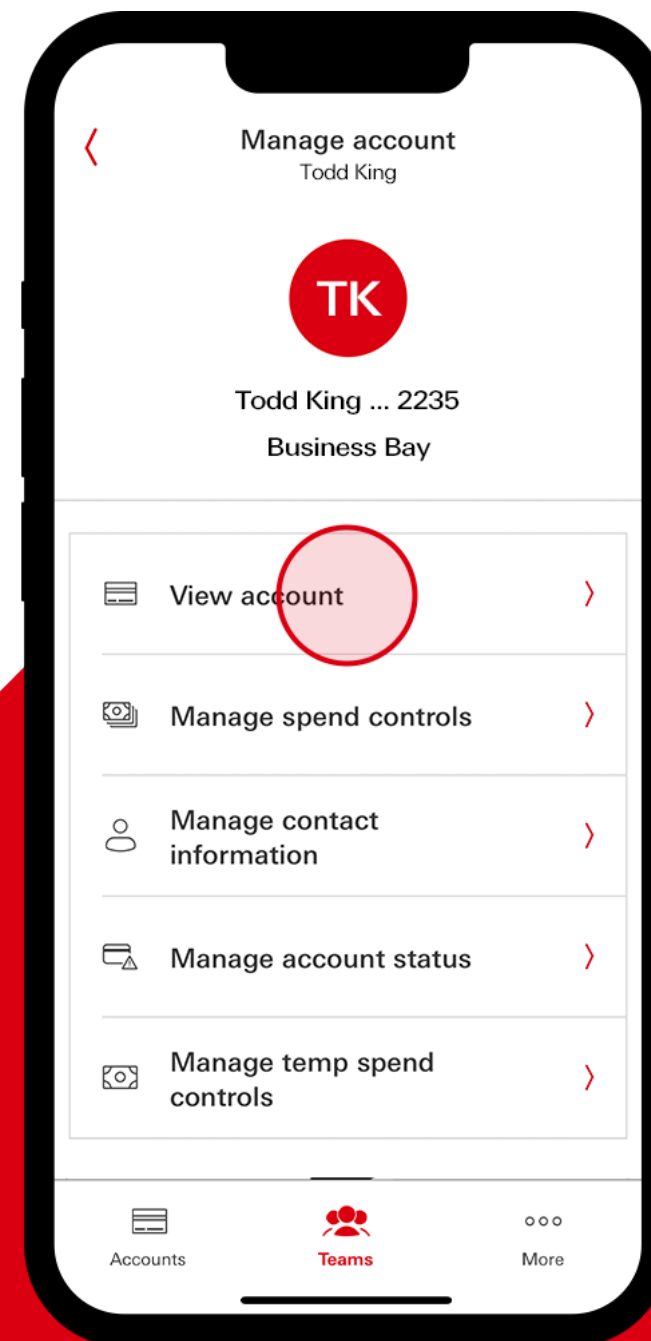


From here you can either change their credit limit or their single-purchase limit.

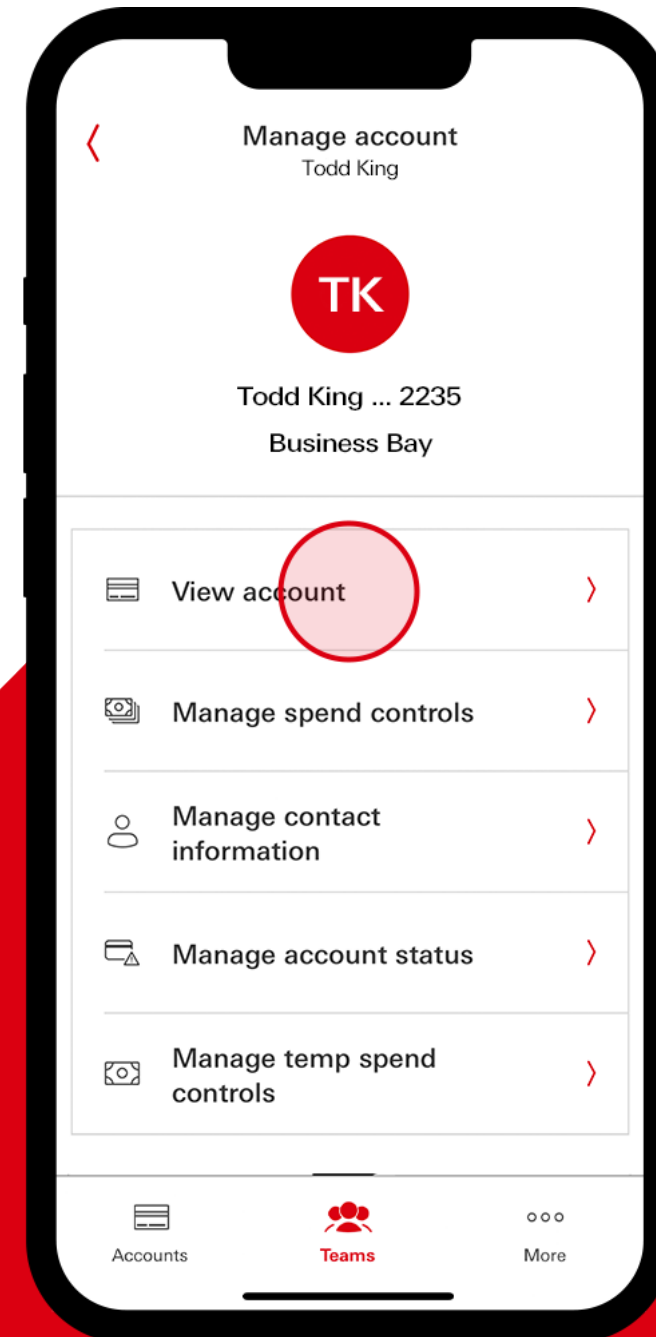


How to:

1. Sign in and register
2. Manage teams
 - Manage spend controls
 - **View account**
 - View transactions and statements
3. Manage payments
4. Reset passwords and unlock accounts

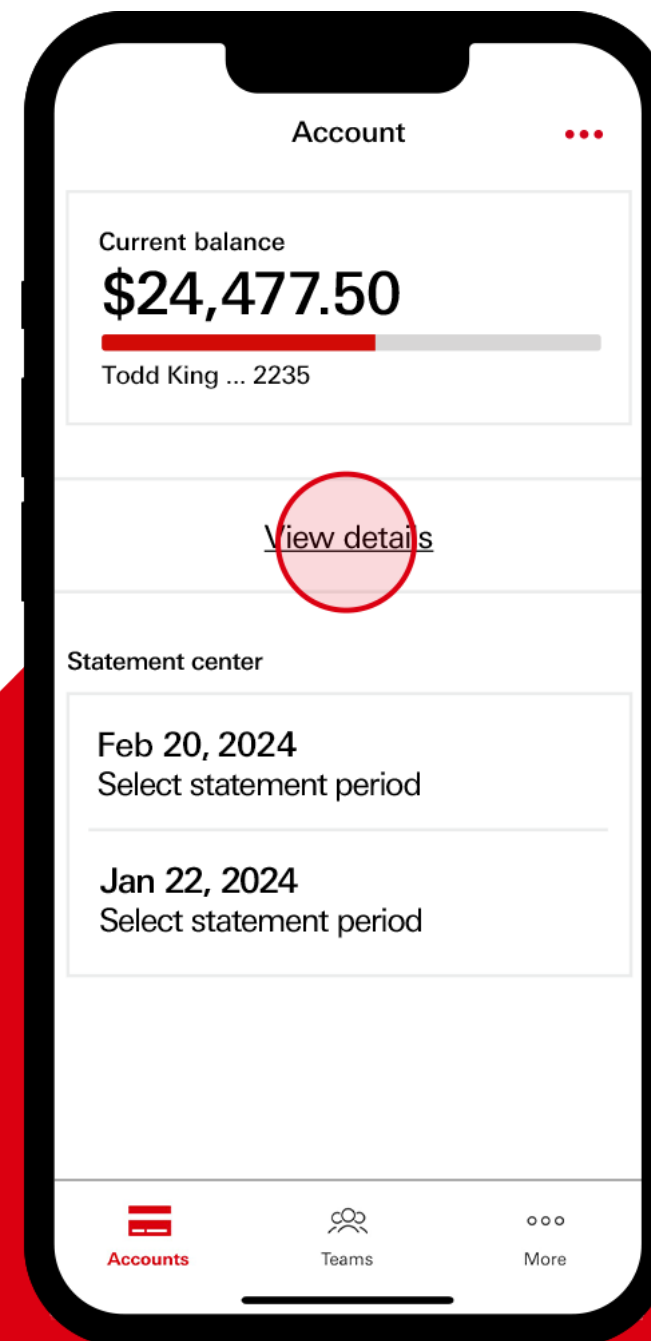


Select “View account.”



Select “View account.”

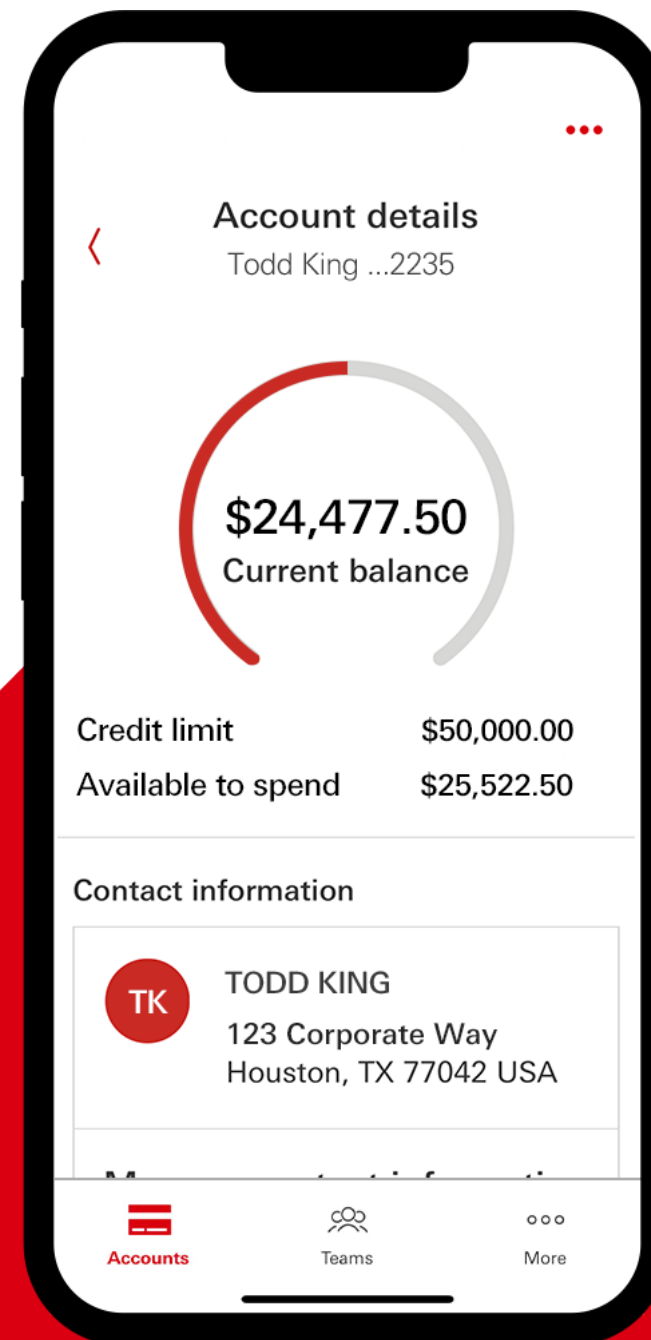
From the Accounts tab,
select “View details.”



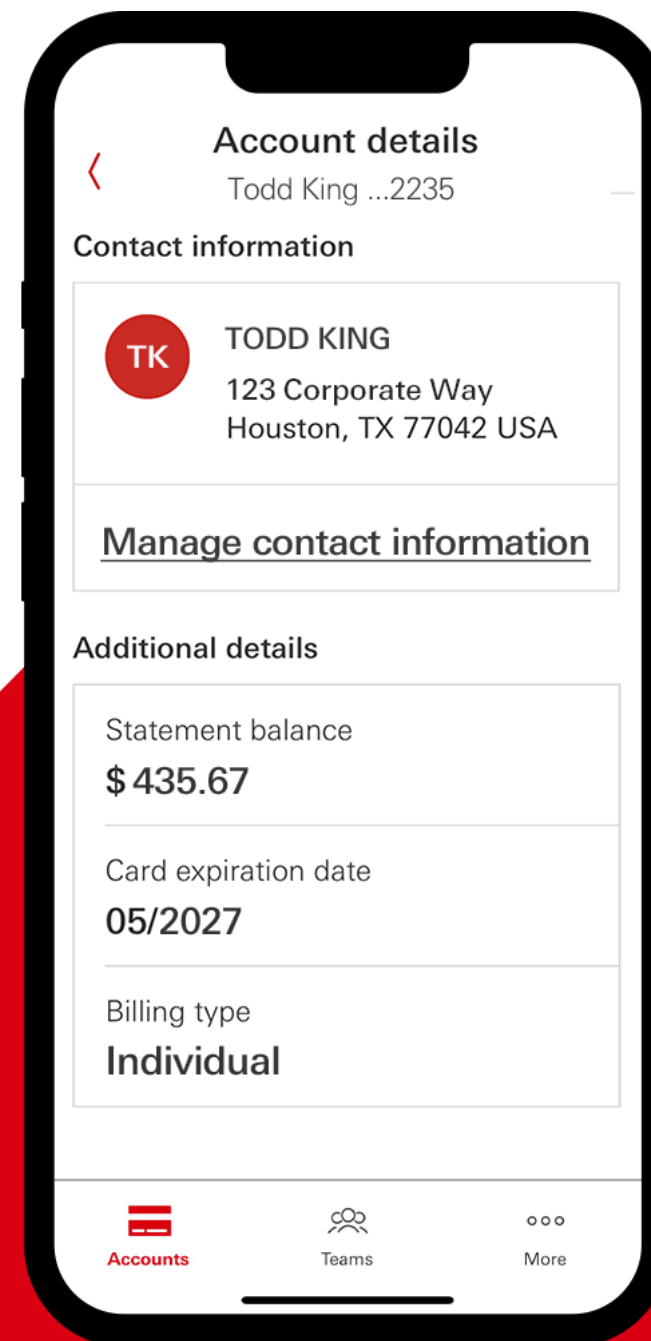
Select “View account.”

From the Accounts tab,
select “View details.”

View current balance,
credit limit, and contact
information.

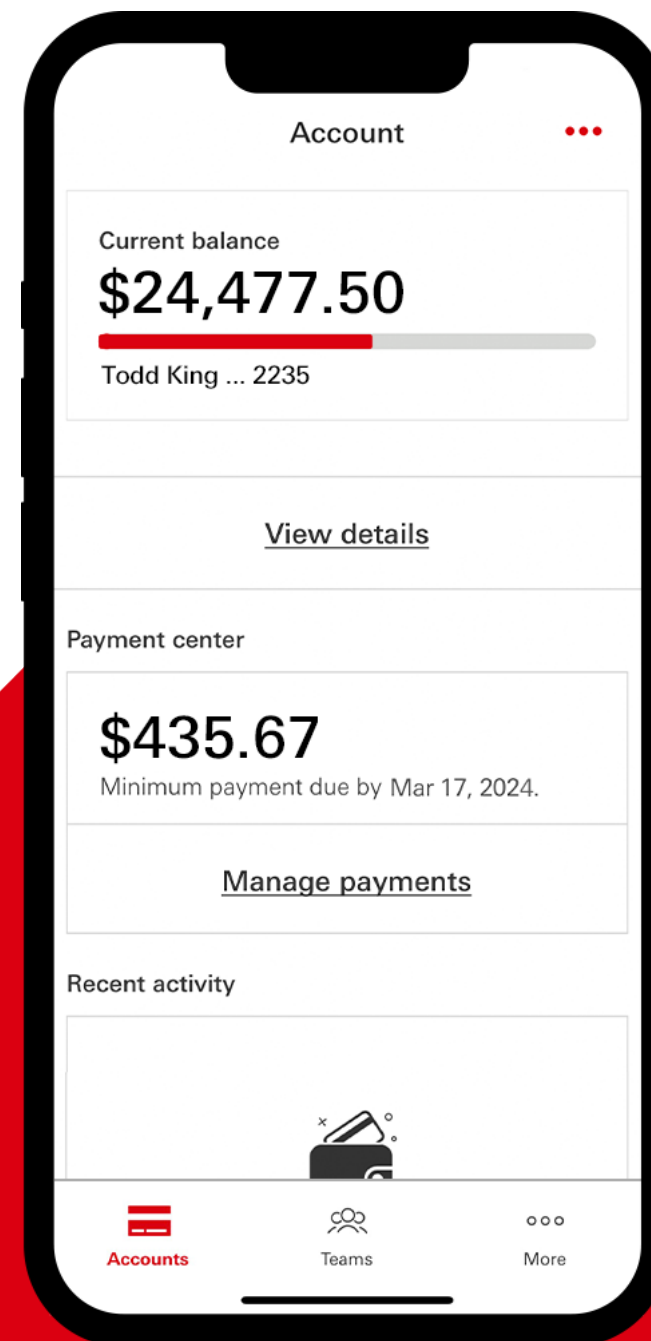


Scroll down to view
additional details.



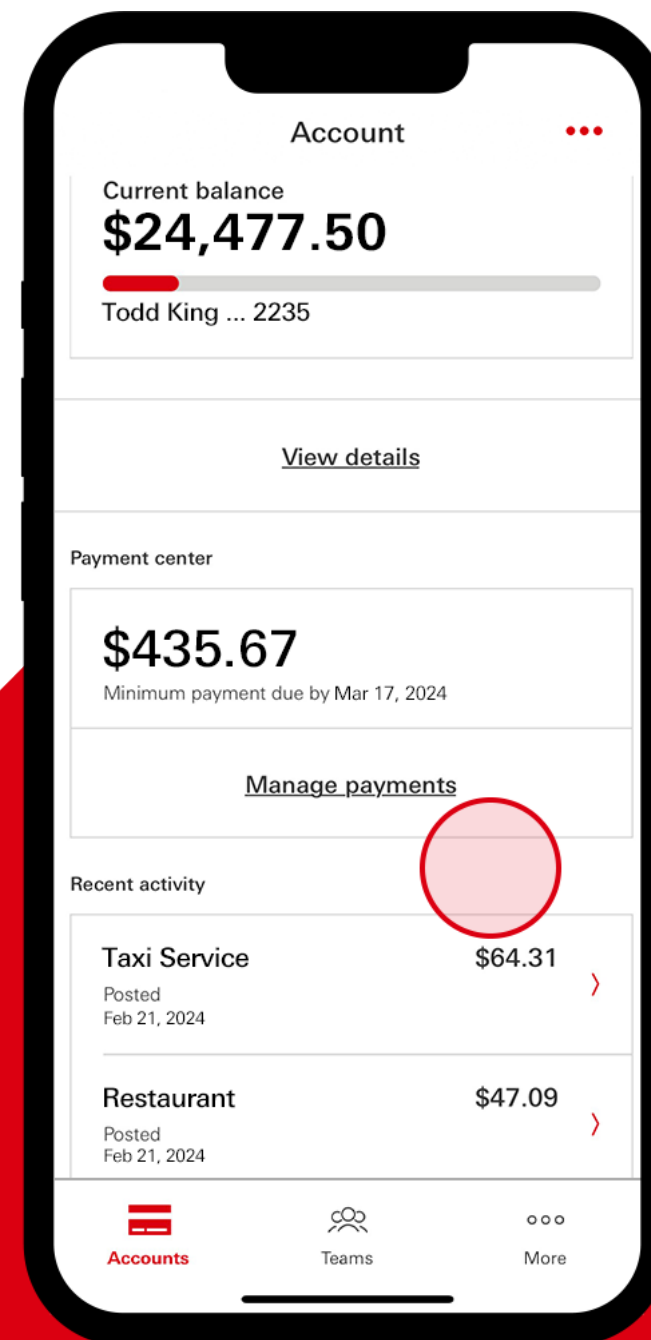
How to:

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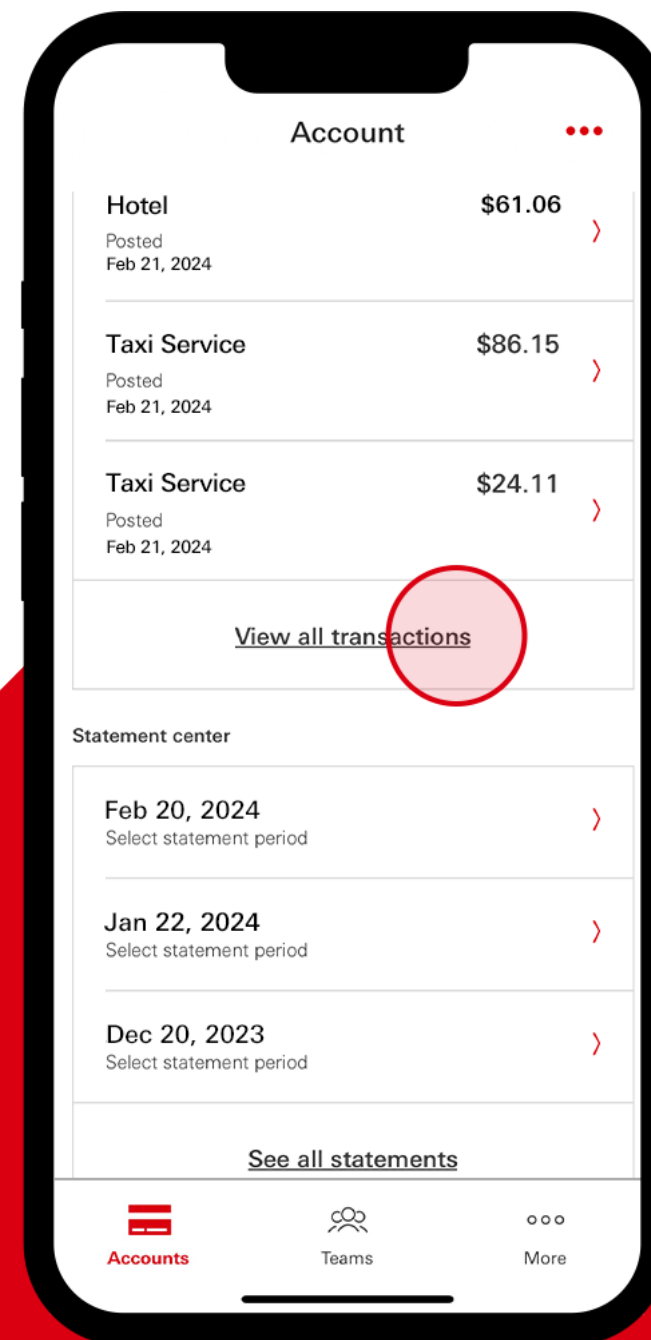
View transactions

From the Accounts tab, scroll down to view all transactions.



View transactions

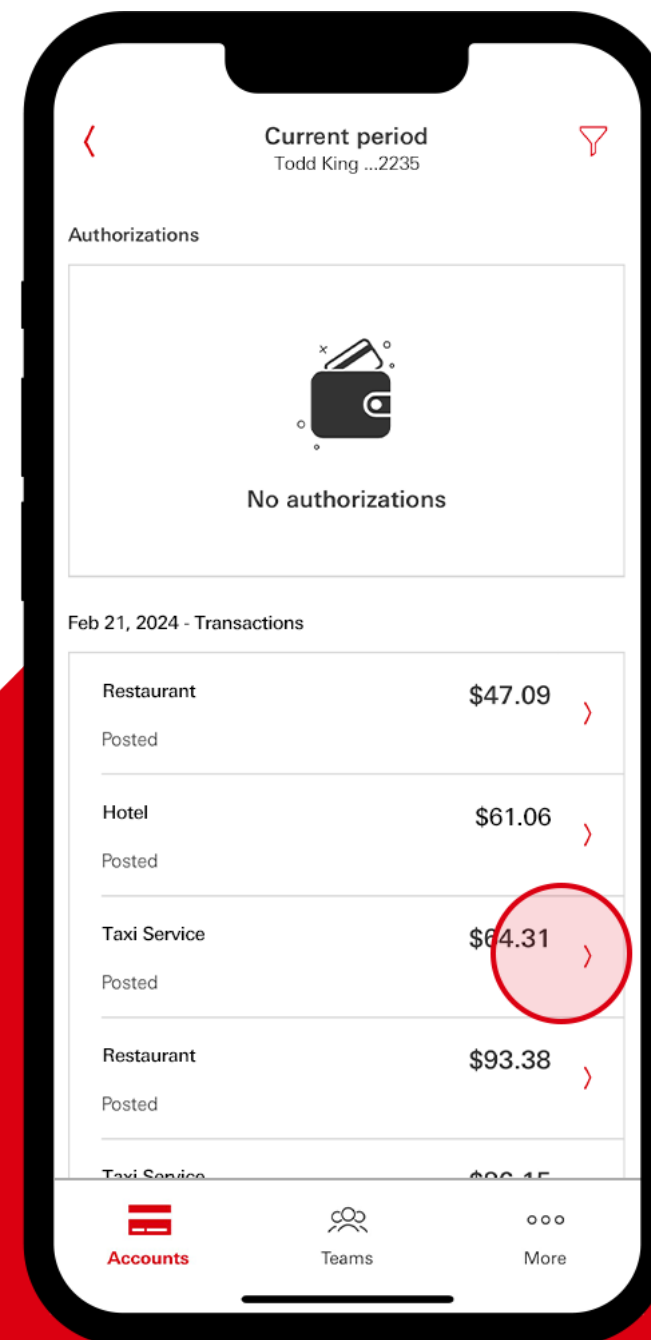
From the Accounts tab, scroll down to view all transactions.
Select “View all transactions.”



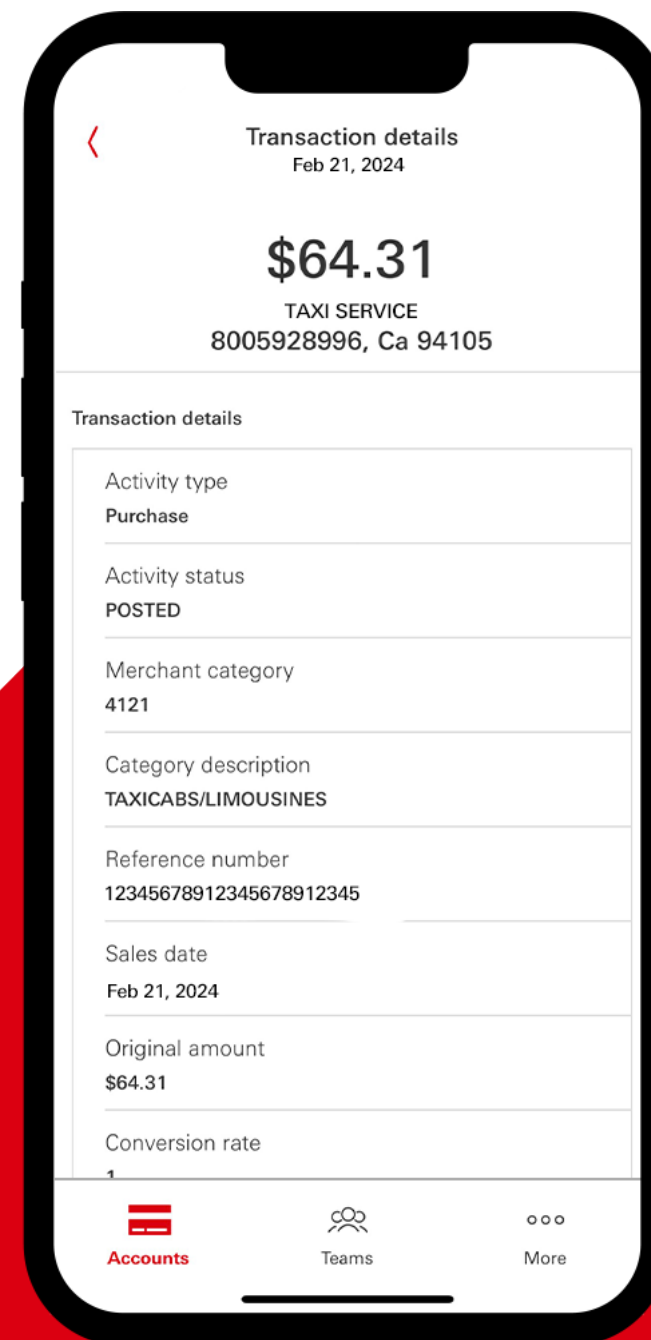
View transactions

From the Accounts tab, scroll down to view all transactions.

Tap the transaction that you want to view.



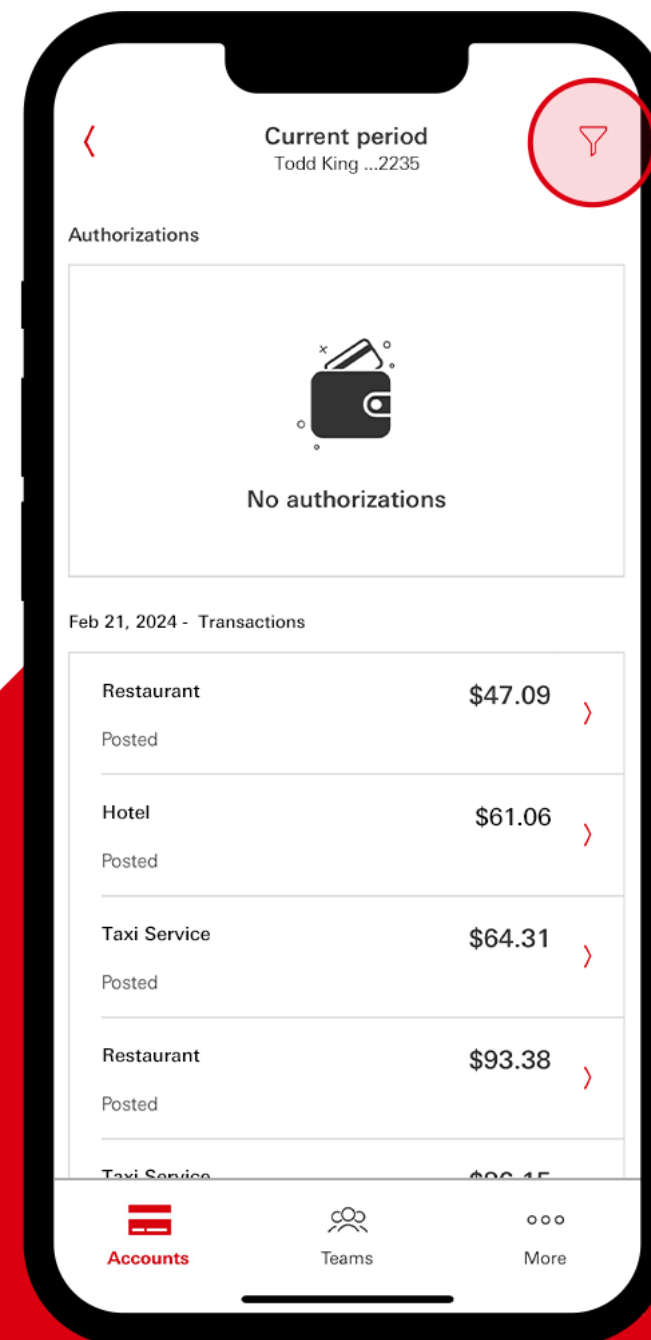
Your transaction is now
ready to view.



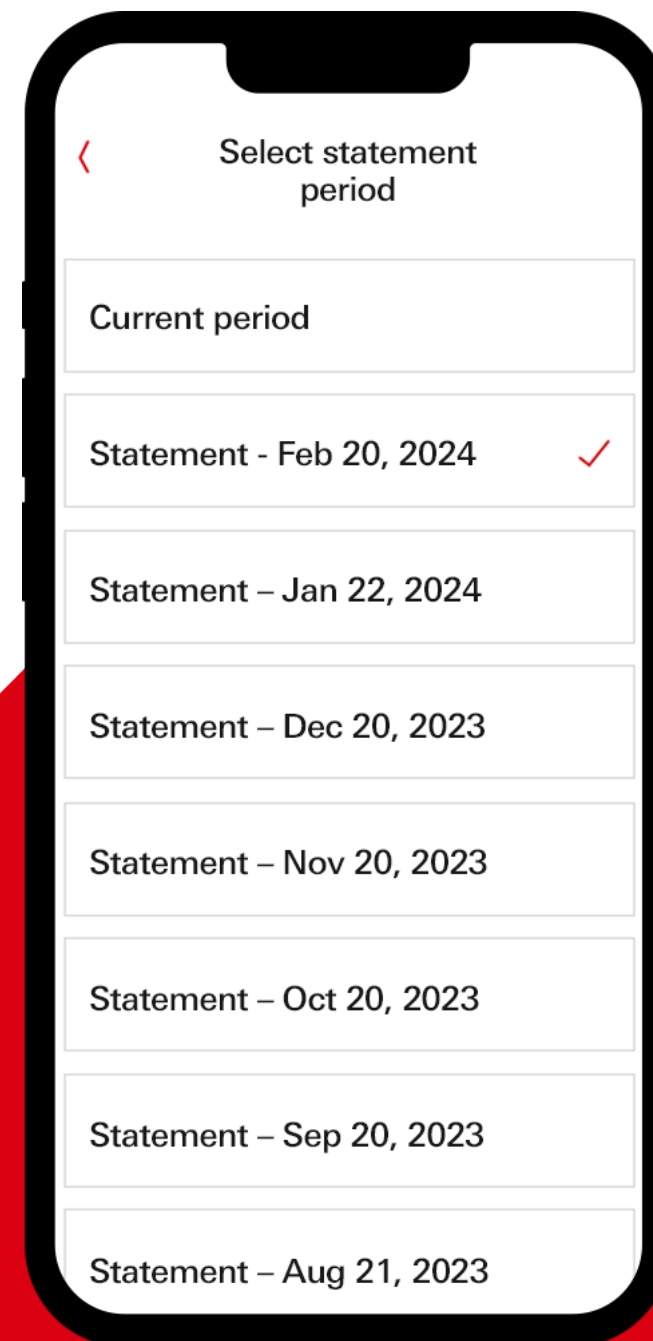
HSBC CentreSuite Guide

How to: View transactions and statements

You can also tap on the filter in the upper right to view transactions from a prior statement period.

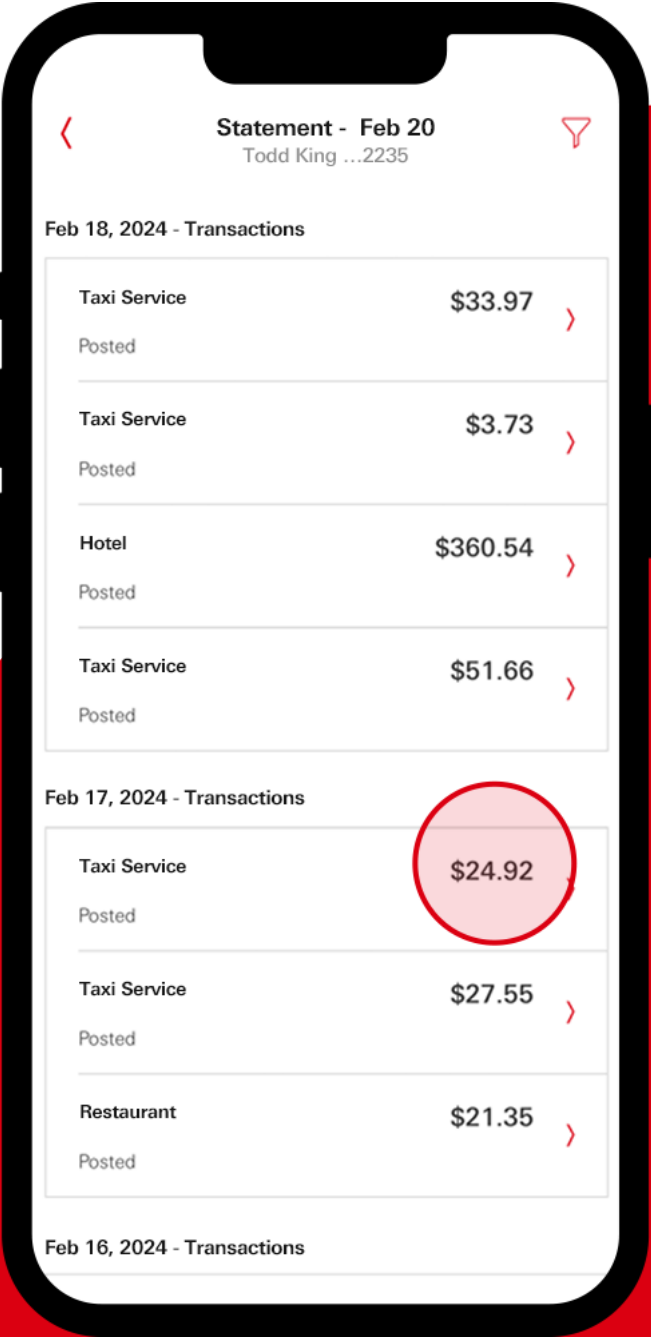


Select from the list of statements to view prior period transactions.



Select from the list of statements to view prior period transactions.

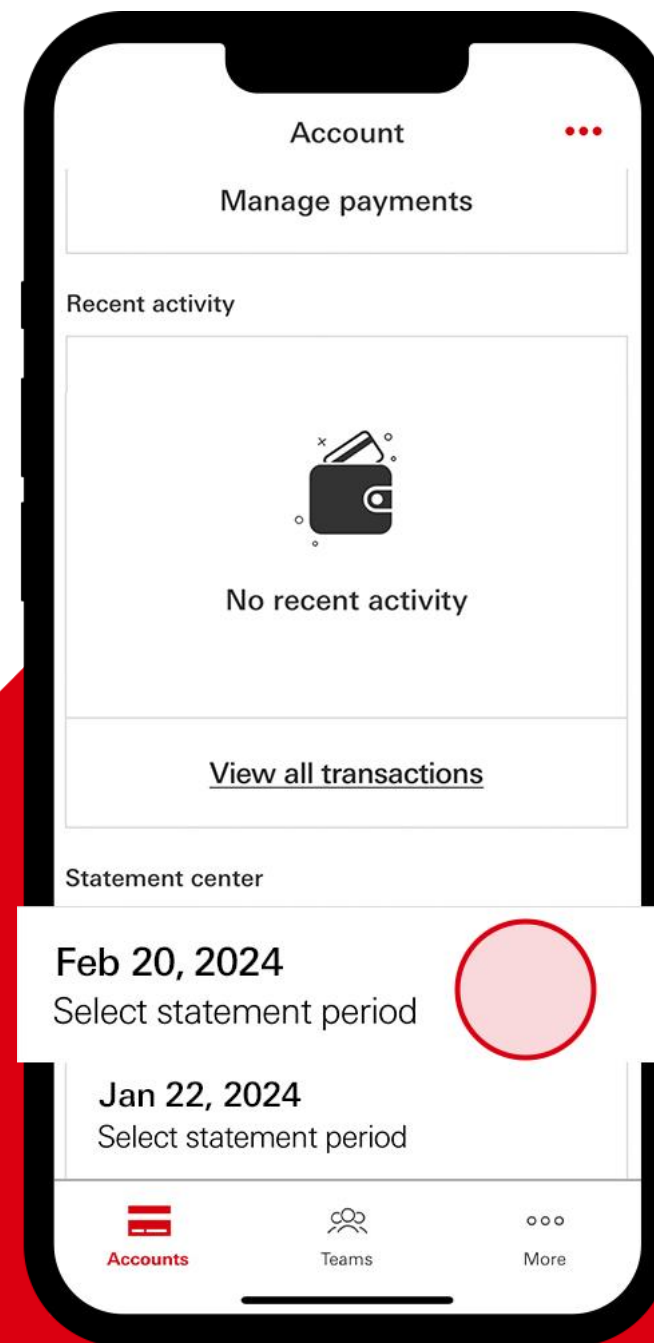
Tap the transaction that you want to view.



View statements

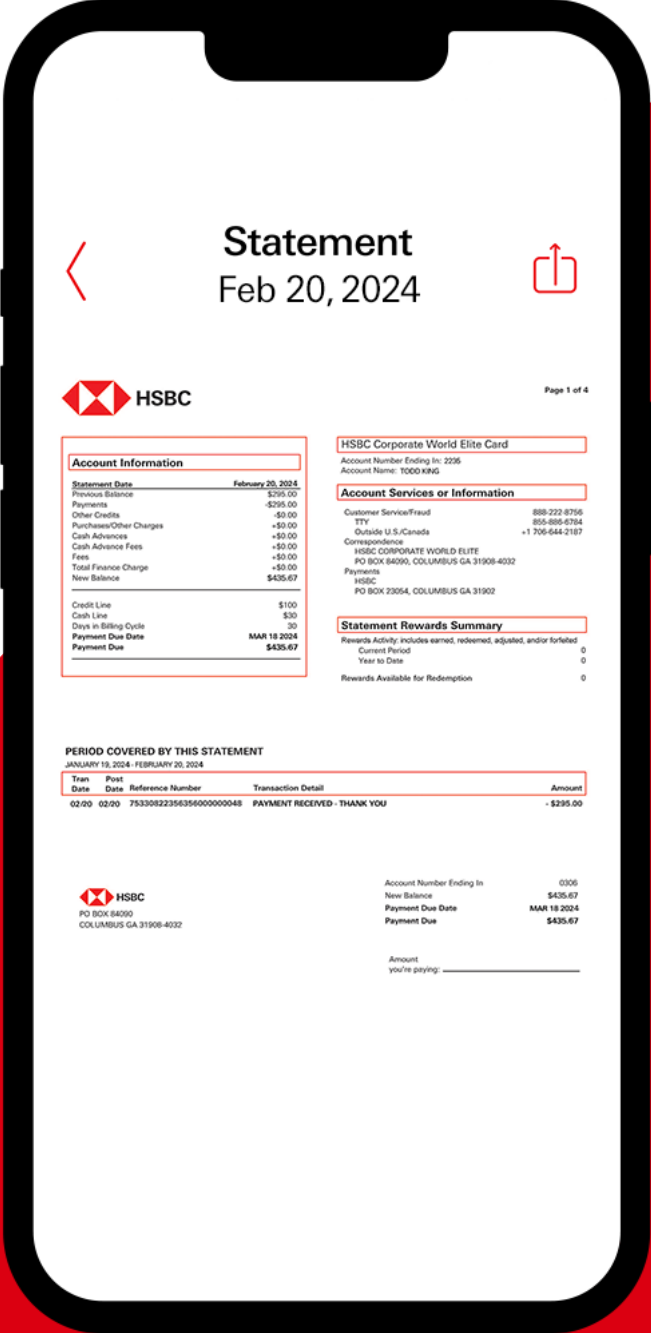
From the Accounts tab,
scroll down to the
“Statement center” section.

Tap the statement you’d
like to view.



View statements

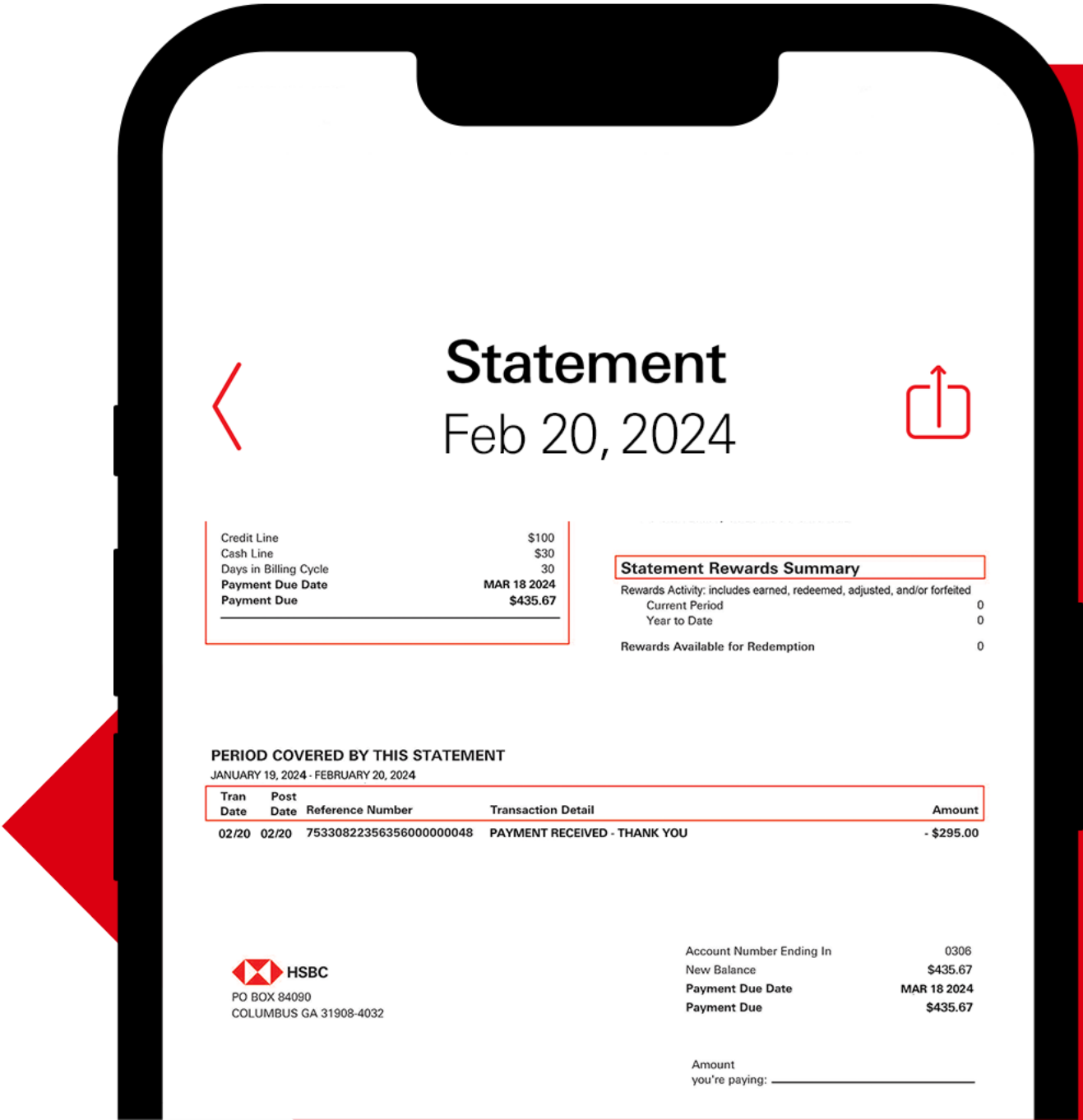
Your statement is now ready to view.



View statements

Your statement is now ready to view.

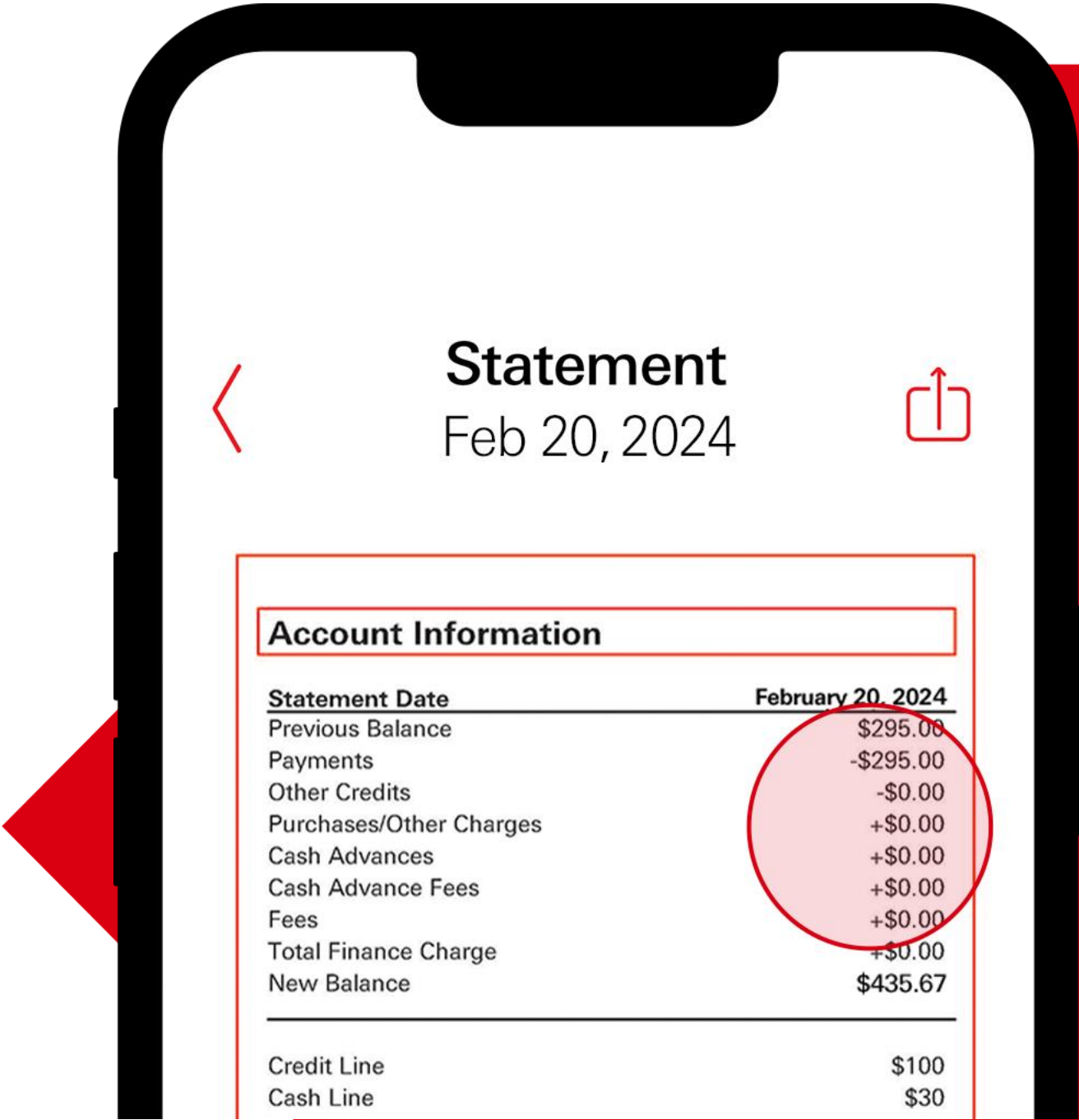
Pinch to zoom or scroll to view more, if needed.



View statements

Your statement is now ready to view.

Pinch to zoom or scroll to view more, if needed.



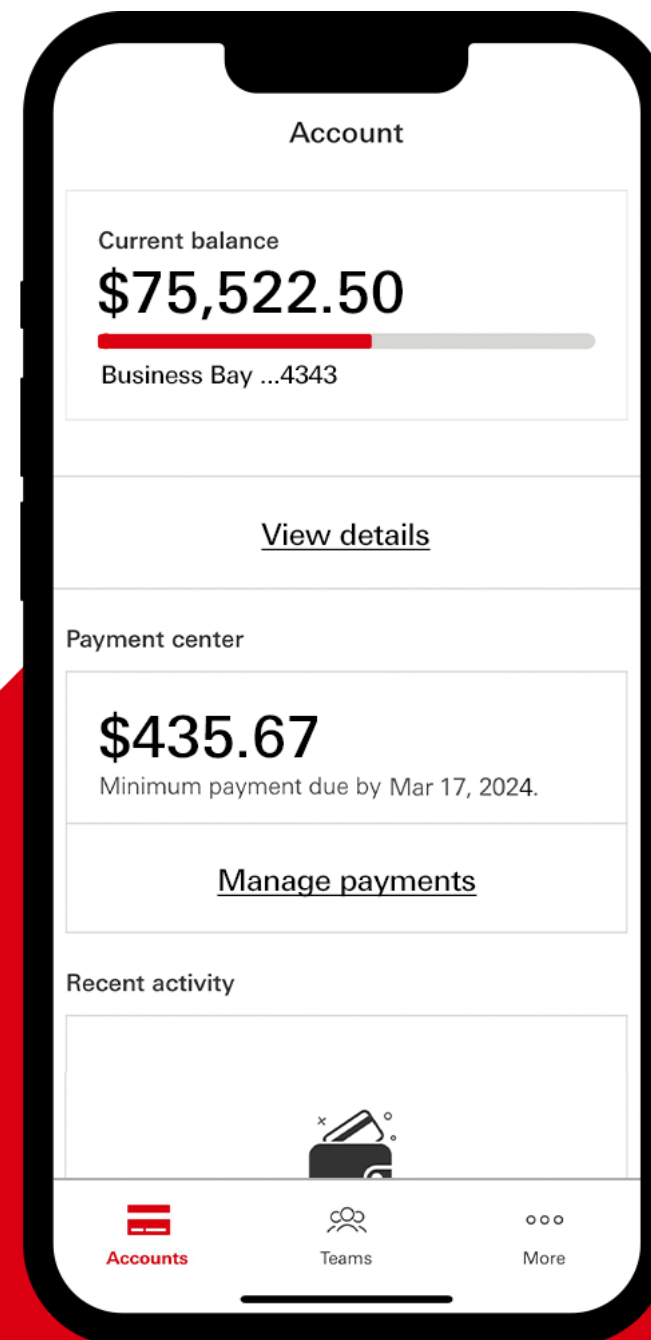
View statements

To save or share your statement, tap the icon in the top-right corner.



How to:

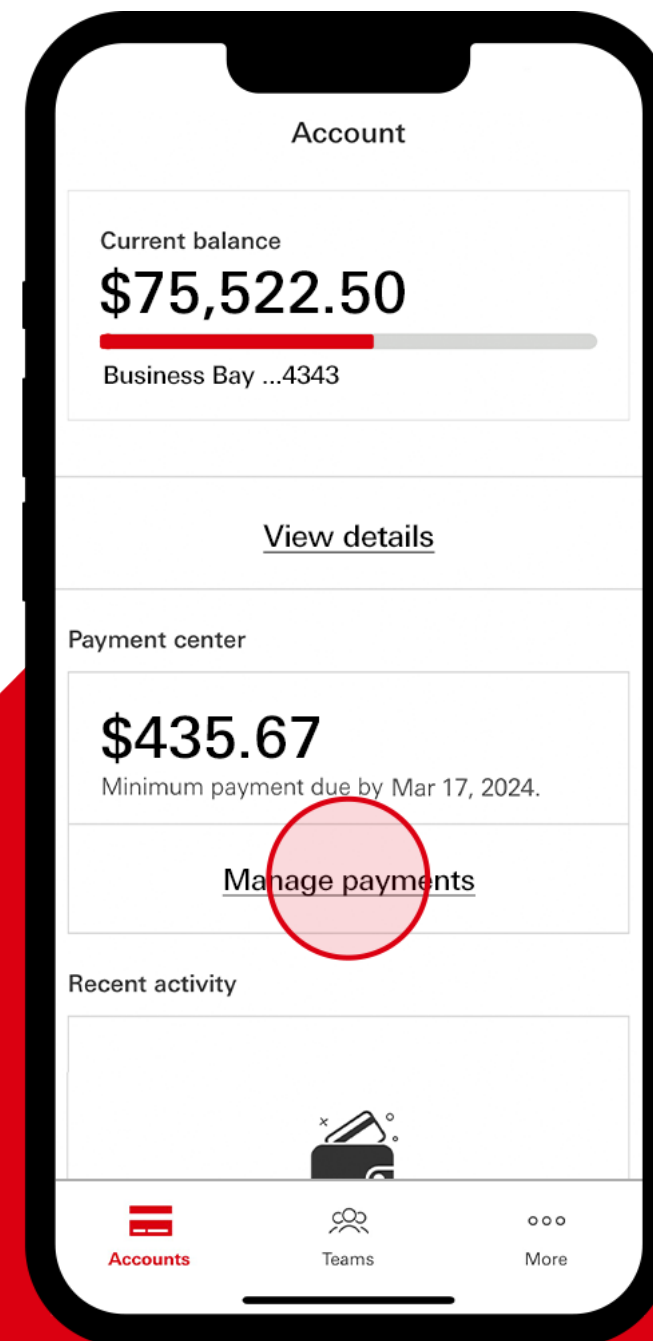
1. Sign in and register
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Set up account for payment

From the Accounts tab, select
“Manage payments.”

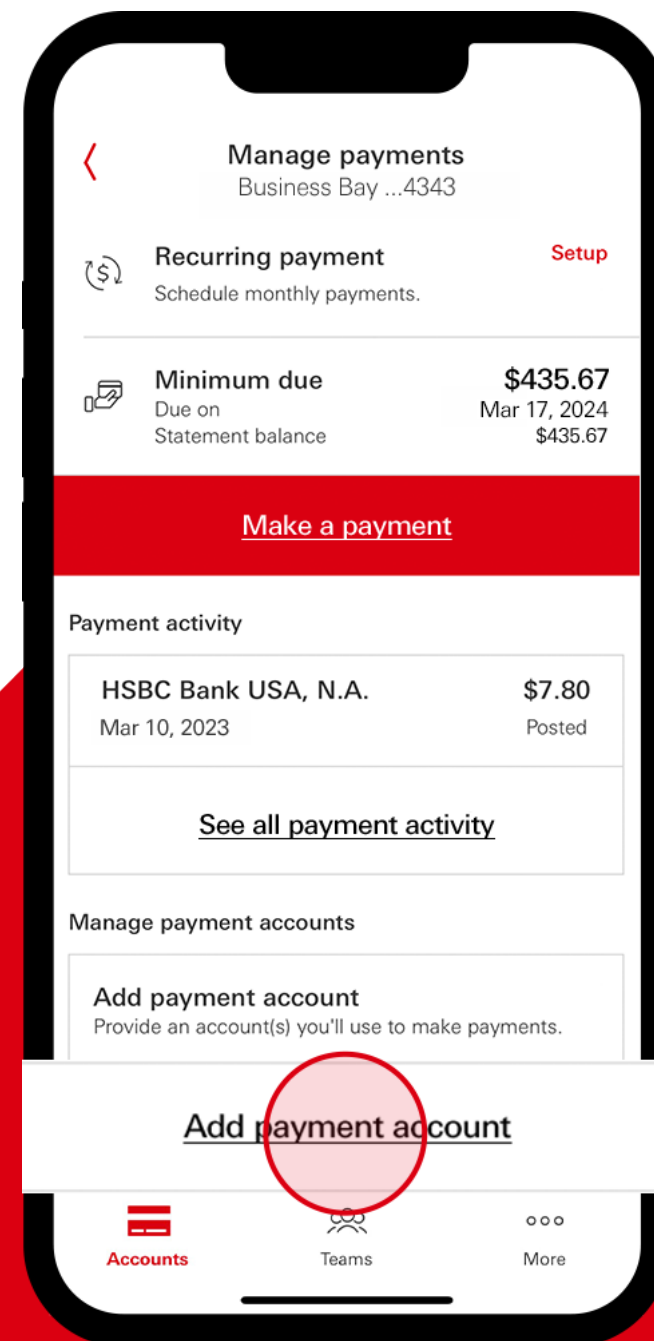
For Individual Pay programs, you may initiate payments on behalf of your team members by first selecting the cardholder name from the Teams tab, then proceeding to the Manage payments feature.



Set up account for payment

From the Accounts tab, select
“Manage payments.”

Select “Add payment account.”



Set up account for payment

Choose “Select account type”
and fill in the account fields.

Funding account must be a deposit account.

A smartphone screen displaying the 'Add account' setup screen. At the top, there is a 'Cancel' button on the left and the title 'Add account' on the right. Below the title is a red piggy bank icon with a dollar sign and a plus sign. Underneath the icon is the text 'Create a new payment account.' The screen is divided into several sections. The first section is 'Bank country*' with the value 'United States'. The second section is 'Account type*' with a dropdown menu showing 'Select Account type'. The third section is 'Business account*' with two buttons: 'Yes' (highlighted in red) and 'No'. The fourth section is 'Account number*' with the placeholder text 'Enter account number'. The fifth section is 'Routing number*' with the placeholder text 'Enter routing number'. At the bottom of the screen, there are two options: 'CHECKING' and 'SAVINGS'. The background of the slide features a large red arrow pointing from the left towards the smartphone screen.

Set up account for payment

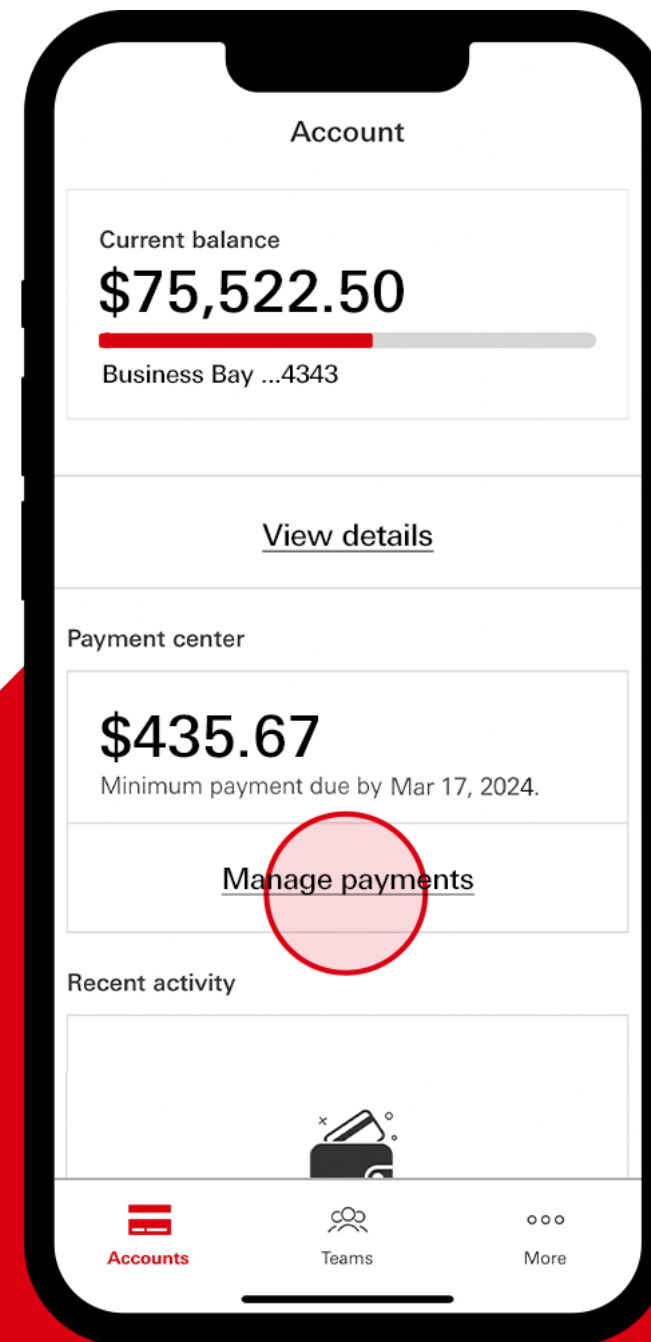
Choose “Select account type”
and fill in the account fields.

Tap “Done” when
you’re finished.

A smartphone screen displaying the 'Add account' form in the HSBC app. The form has a white background with a black border. At the top, there are two buttons: 'Cancel' in red and 'Add account' in black. Below these are several input fields, each with a label and a placeholder text. The fields are: 'Account number*' with placeholder 'Enter account number', 'Routing number*' with placeholder 'Enter routing number', 'Account nickname*' with placeholder 'Enter account nickname', 'Account holder name*' with placeholder 'Enter account holder name', 'Address line 1*' with placeholder 'Enter address line 1', 'Address line 2' with placeholder 'Enter address line 2 (optional)', 'City*' with placeholder 'Enter city', 'State/Province*' with a dropdown arrow and placeholder 'Select State/Province', and 'Postal code*' with placeholder 'Enter postal code'. At the bottom right of the form, there is a red button labeled 'Done' which is circled in red. The bottom of the screen shows the app's navigation bar with three icons: 'Accounts' (a red bar icon), 'Teams' (a group of people icon), and 'More' (three dots icon). The 'Accounts' icon is highlighted in red.

Making a payment

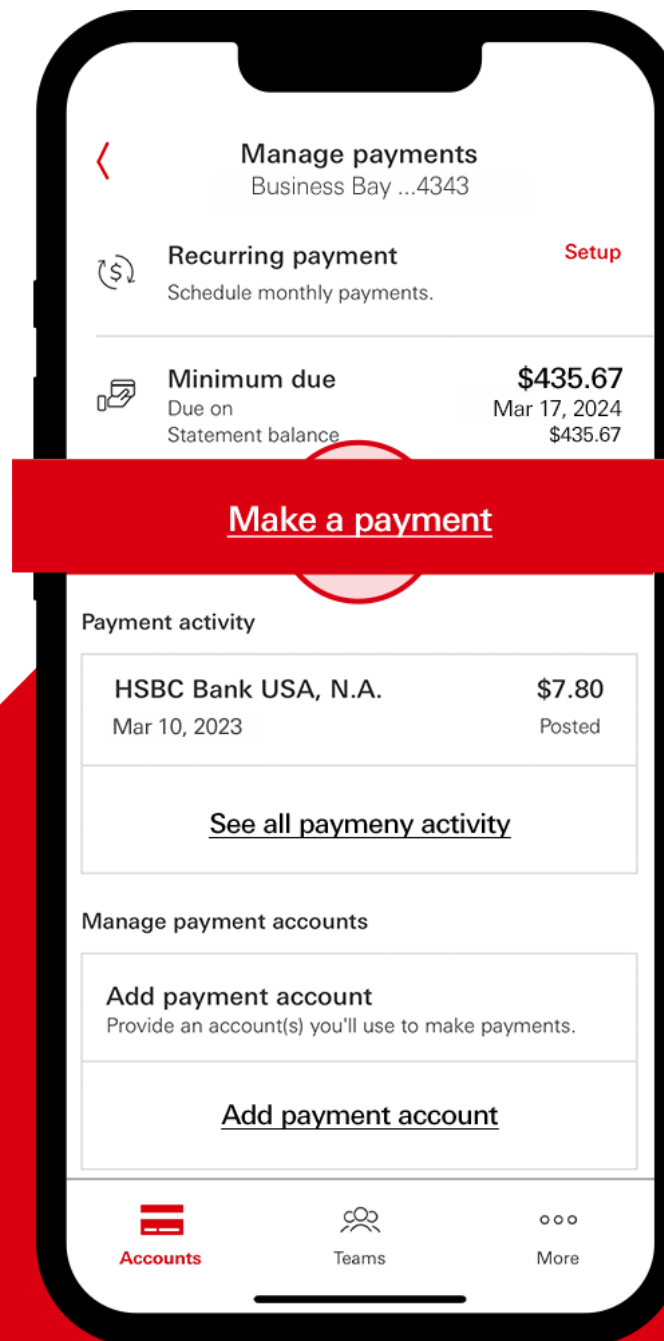
From the Accounts tab, select
“Manage payments.”



Making a payment

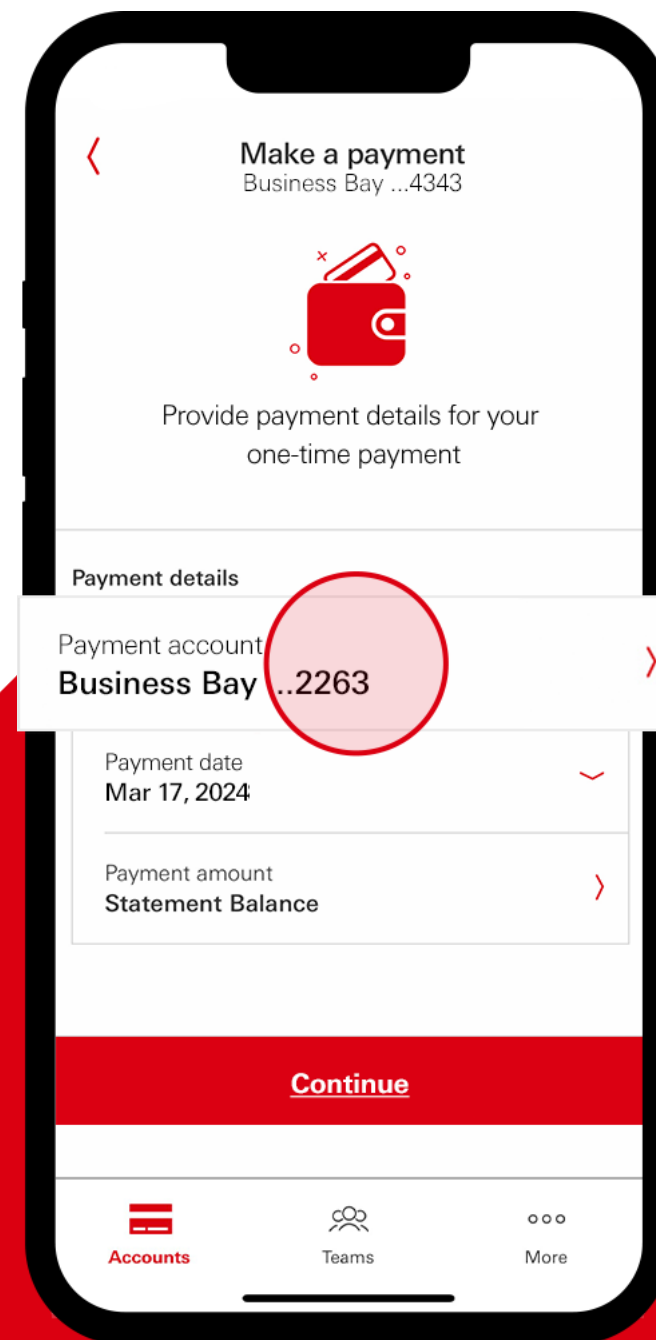
From the Accounts tab, select
“Manage payments.”

Select “Make a payment.”



Making a payment

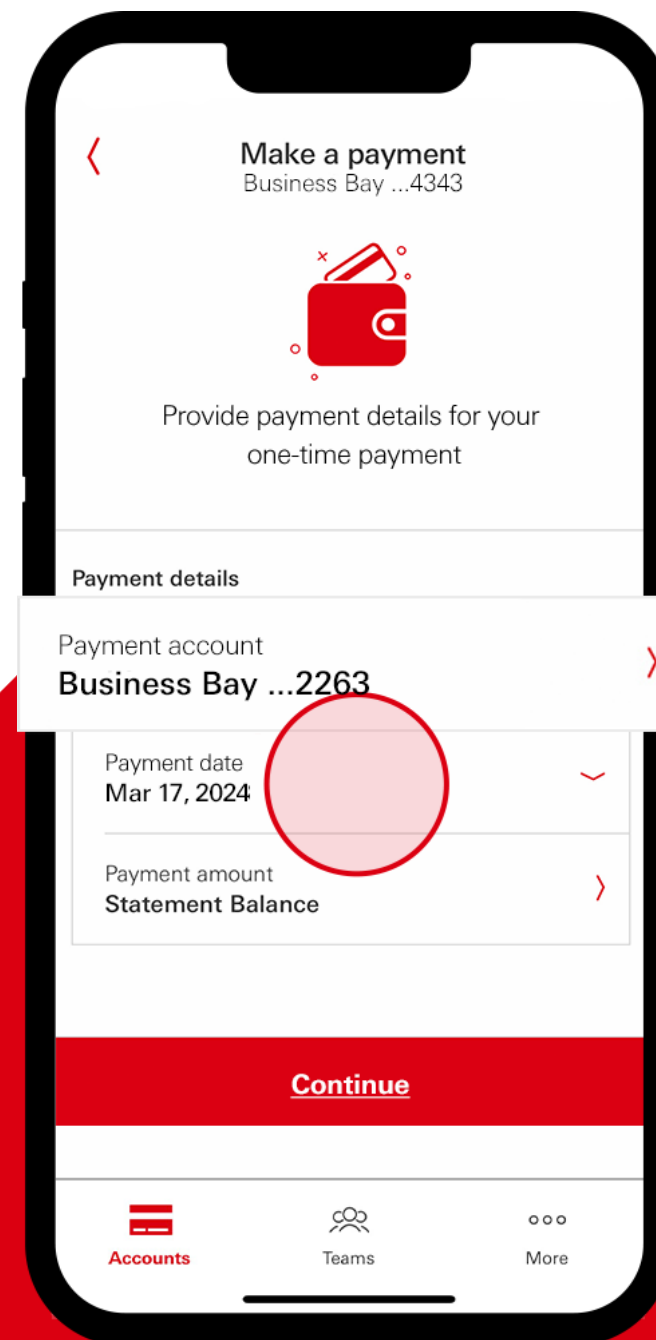
Select the account you would like to use for payment.



Making a payment

Select the account you would like to use for payment.

Select the payment date.

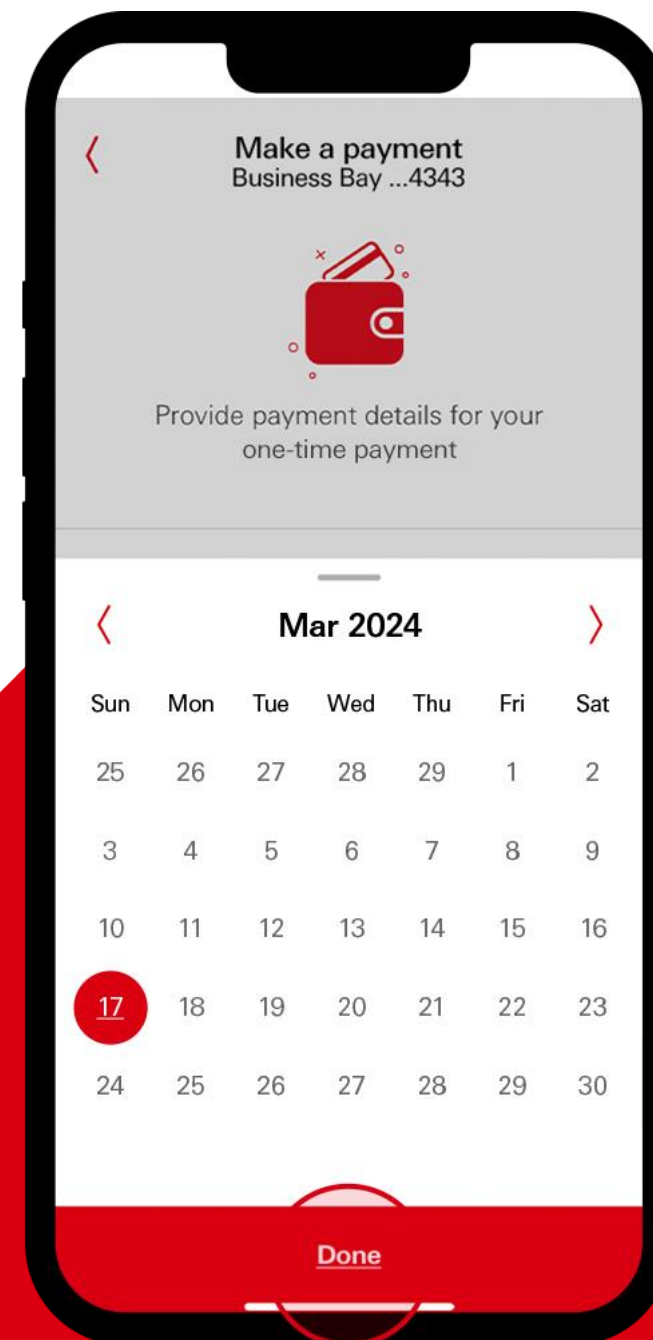


Making a payment

Select the account you would like to use for payment.

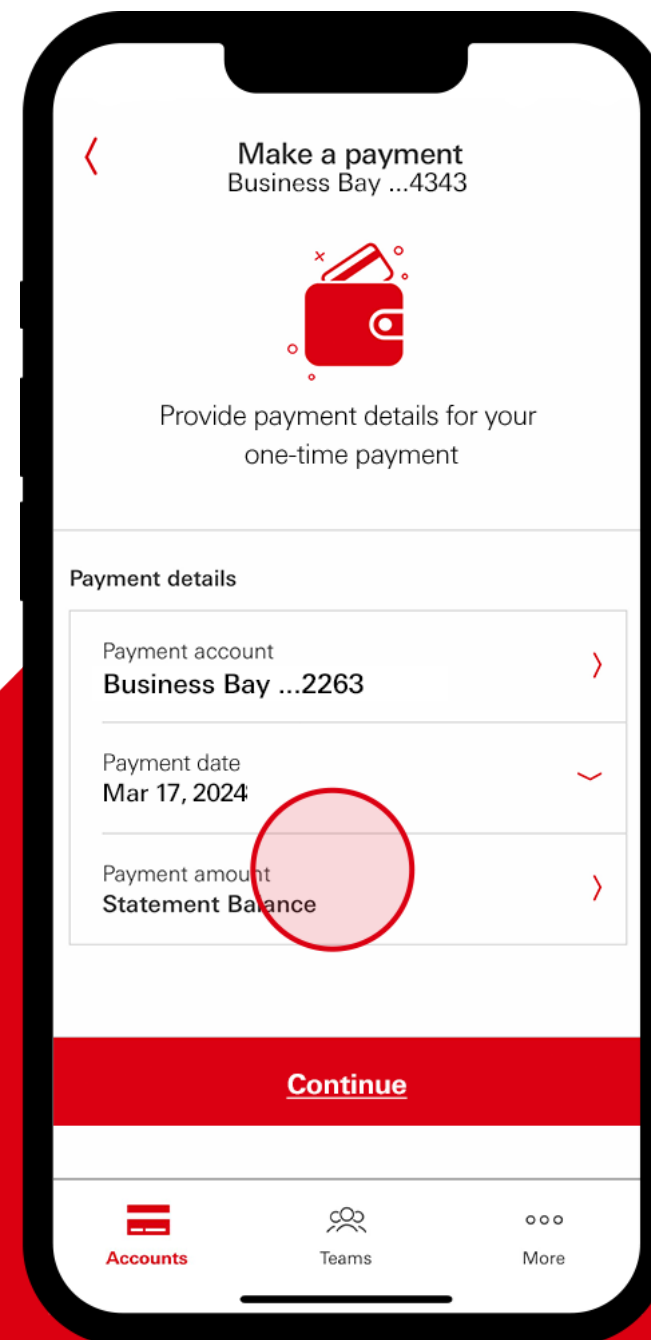
Select the payment date.

Select “Done.”



Making a payment

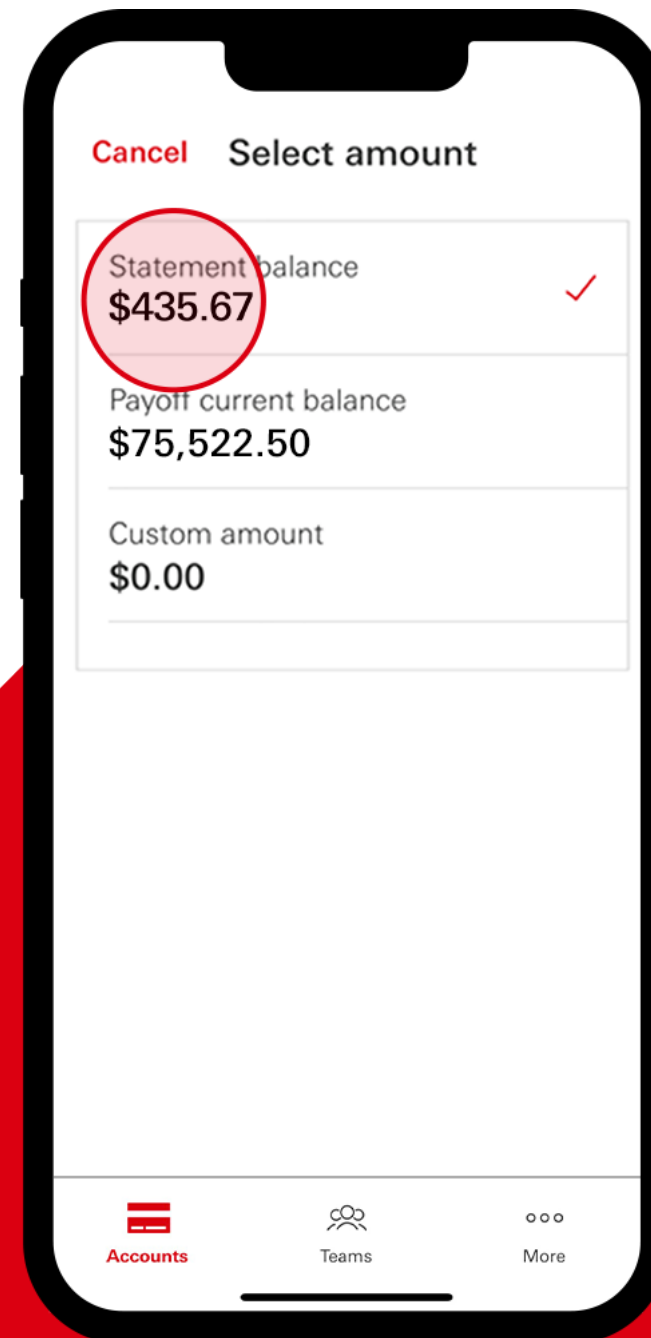
Select the payment amount.



Making a payment

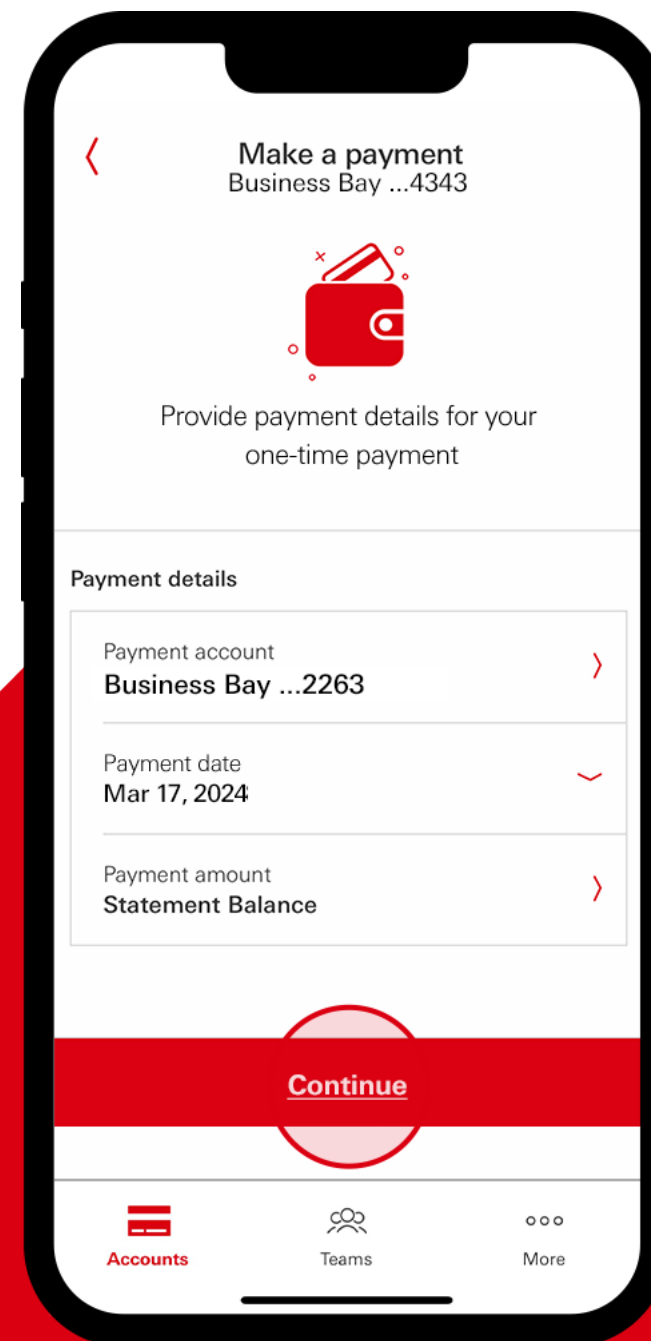
Select the payment amount.

Select the amount or add a custom amount.



Making a payment

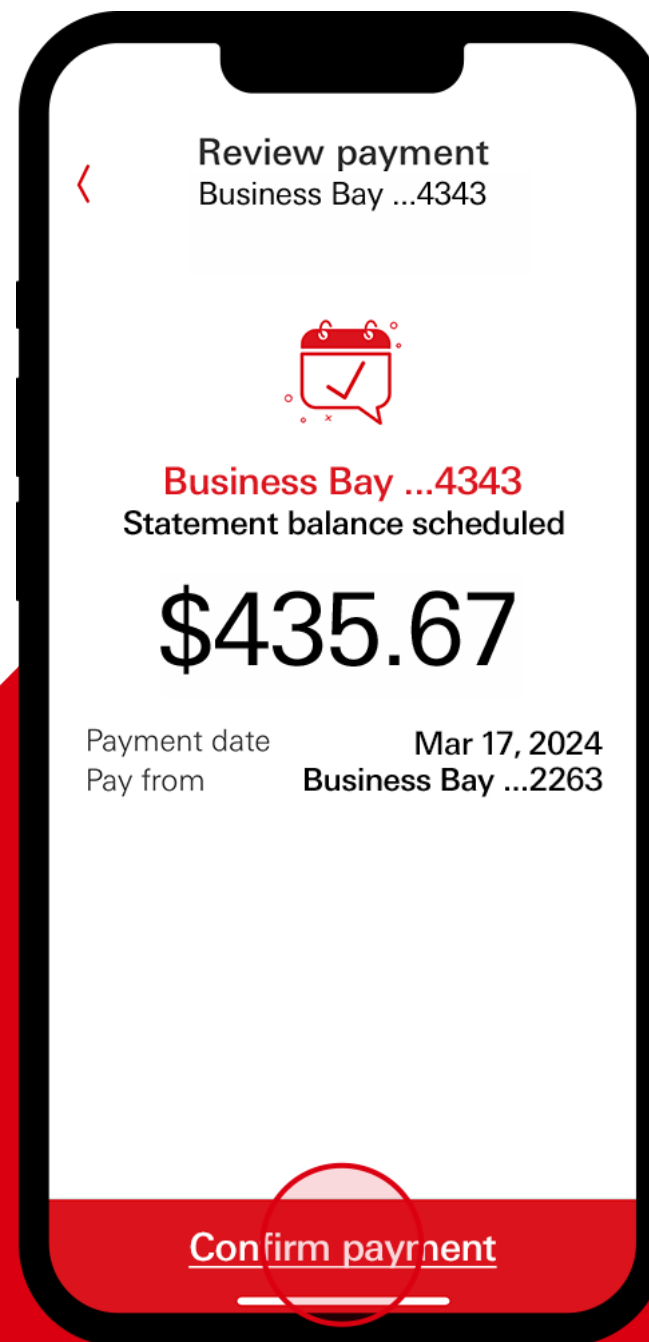
Once you've set up your payment details, select "Continue."



Making a payment

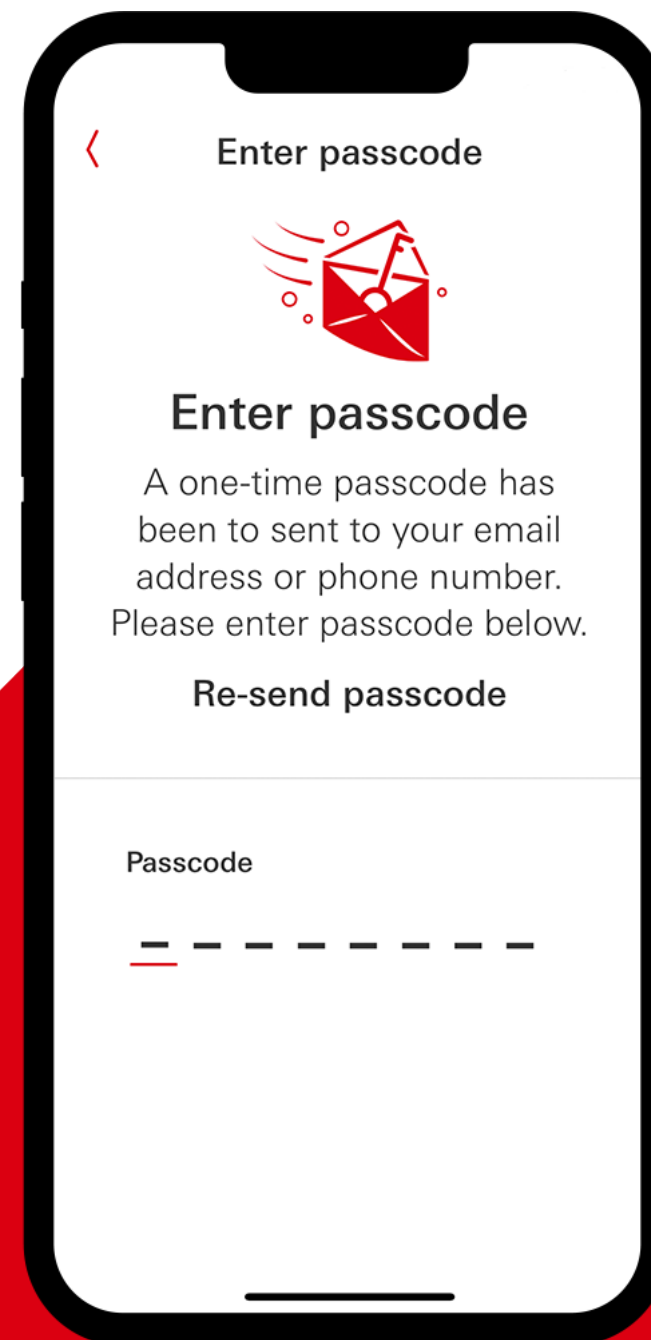
Once you've set up your payment details, select "Continue."

Check that the information is correct, then select "Confirm payment."



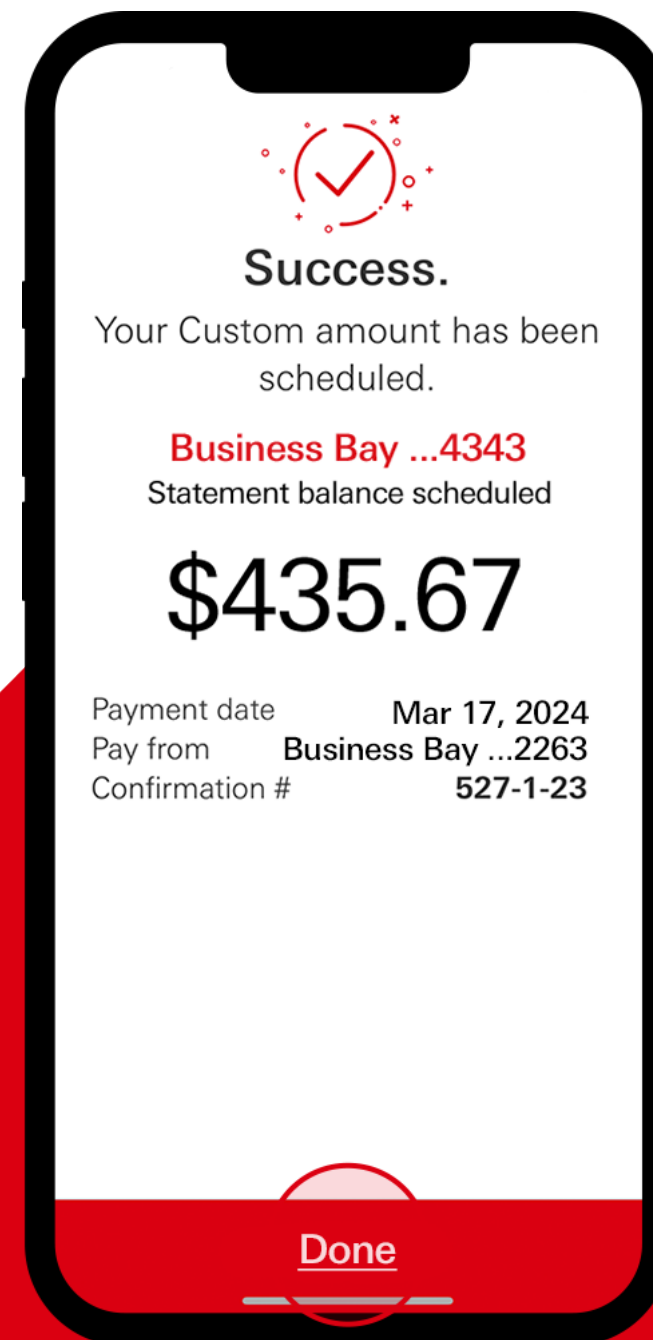
Making a payment

Enter the one-time passcode sent to your email address or phone number



Making a payment

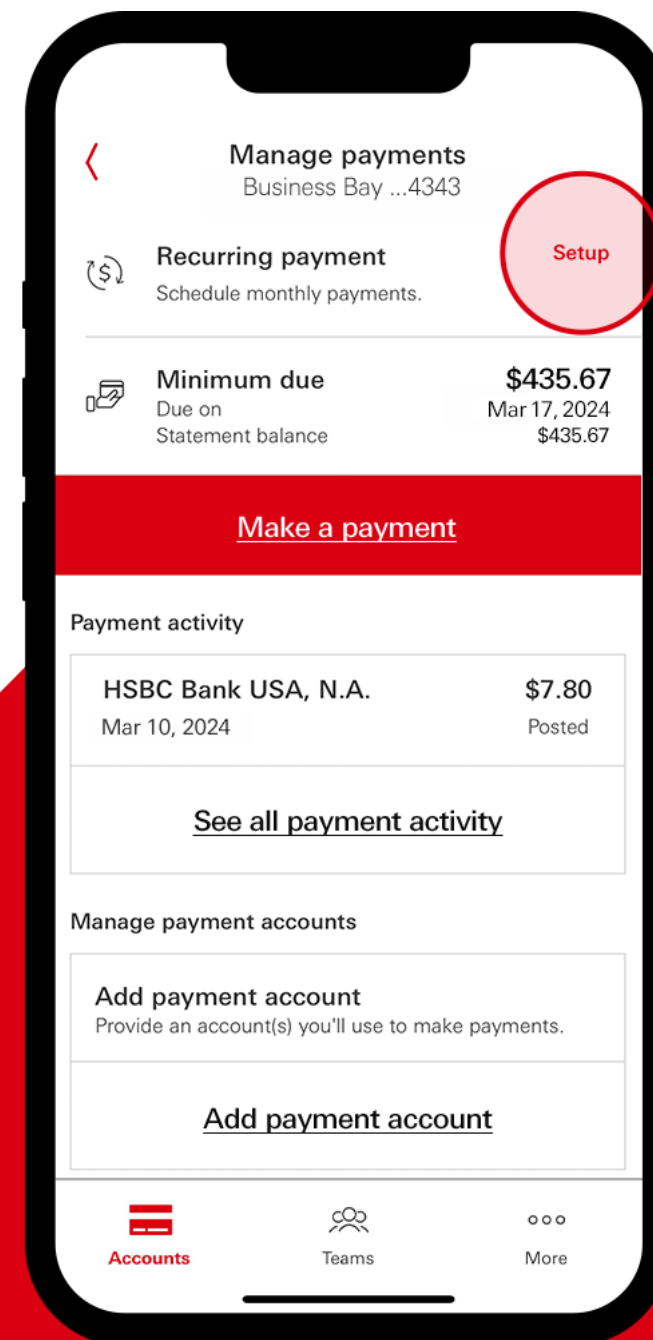
Select “Done” when complete.



Set up recurring payments

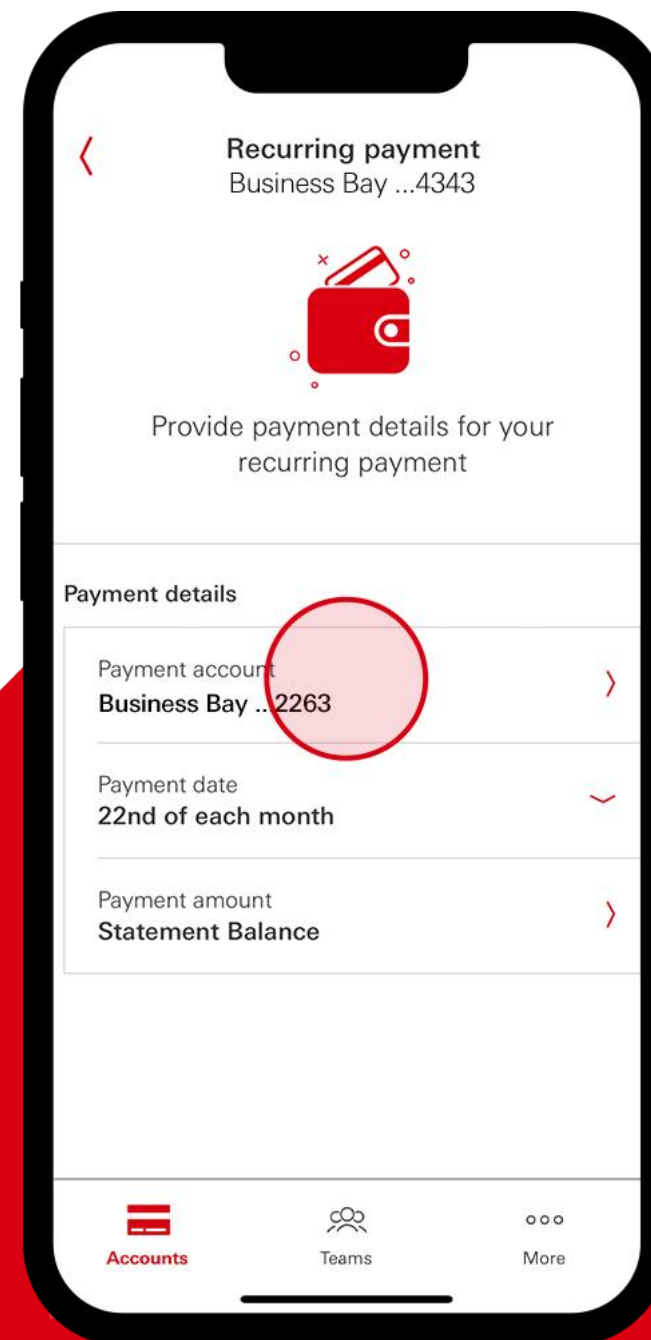
From the Accounts tab, select
“Manage payments.”

Select
“Recurring payment – Setup.”



Set up recurring payments

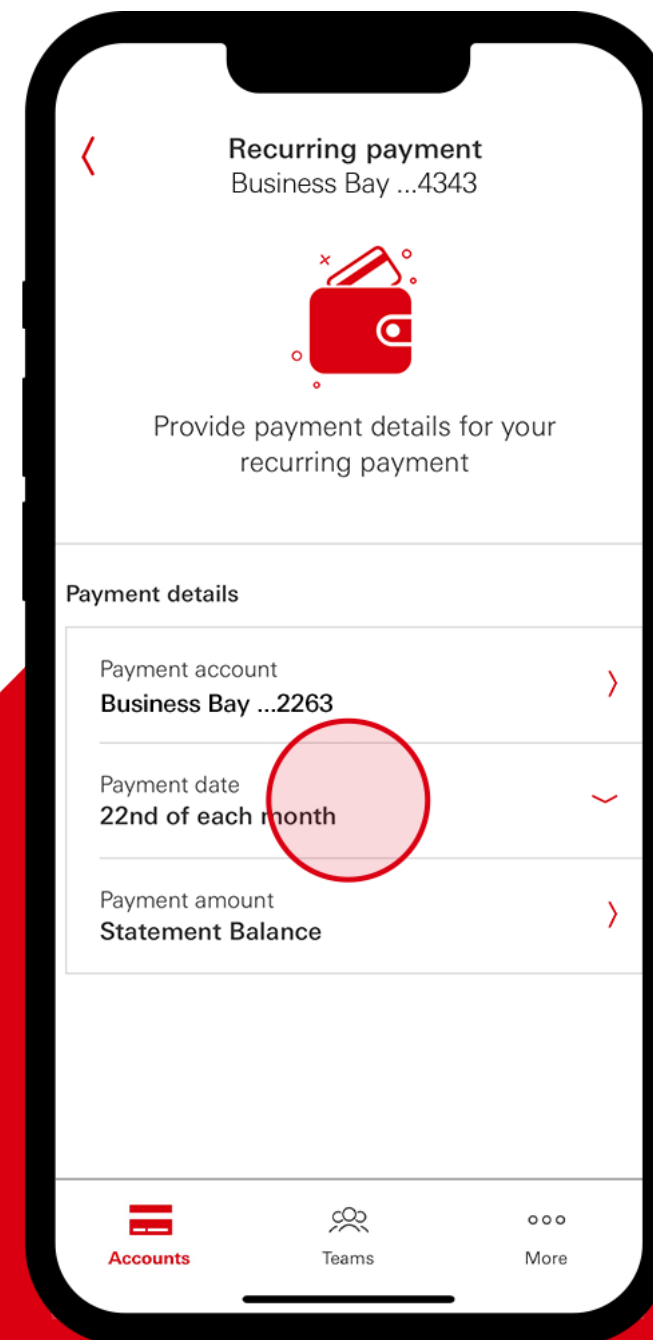
From the Accounts tab, select
“Manage payments.”



Set up recurring payments

Select the account you would like to use for payment.

Select the payment date.

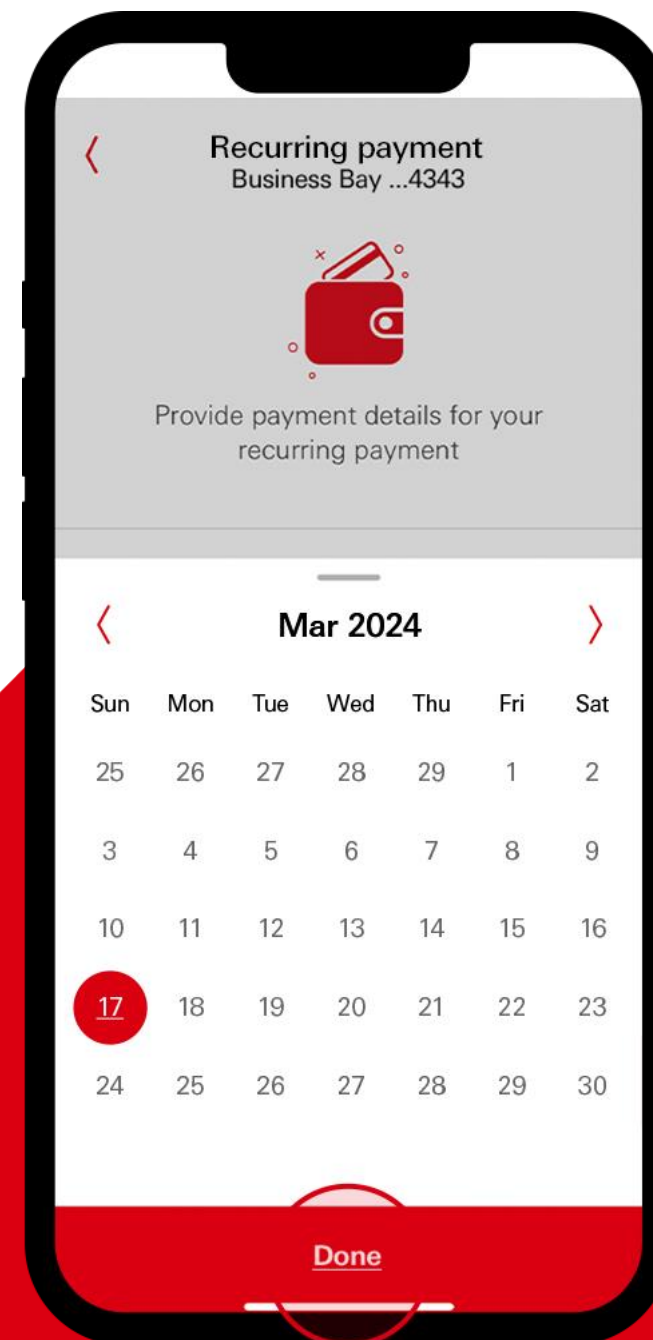


Set up recurring payments

Select the account you would like to use for payment.

Select the payment date.

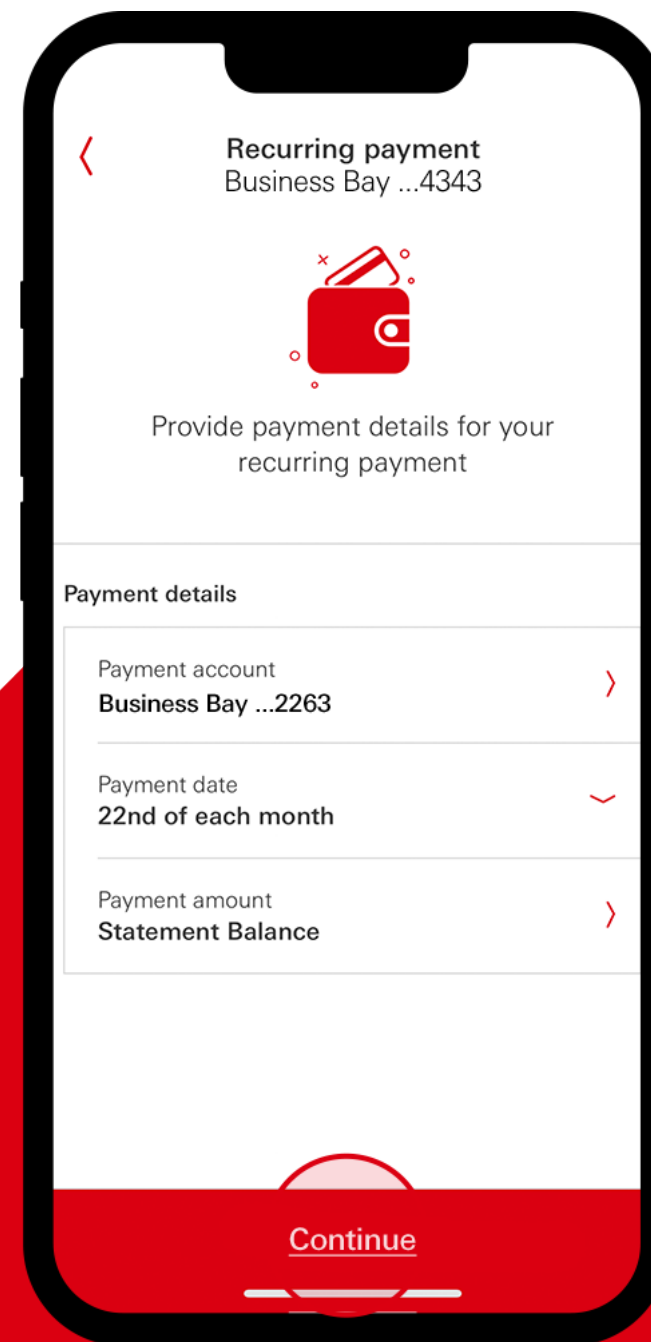
Select “Done.”



Set up recurring payments

The recurring payment you've chosen will automatically pay your statement balance on the due date you've selected.

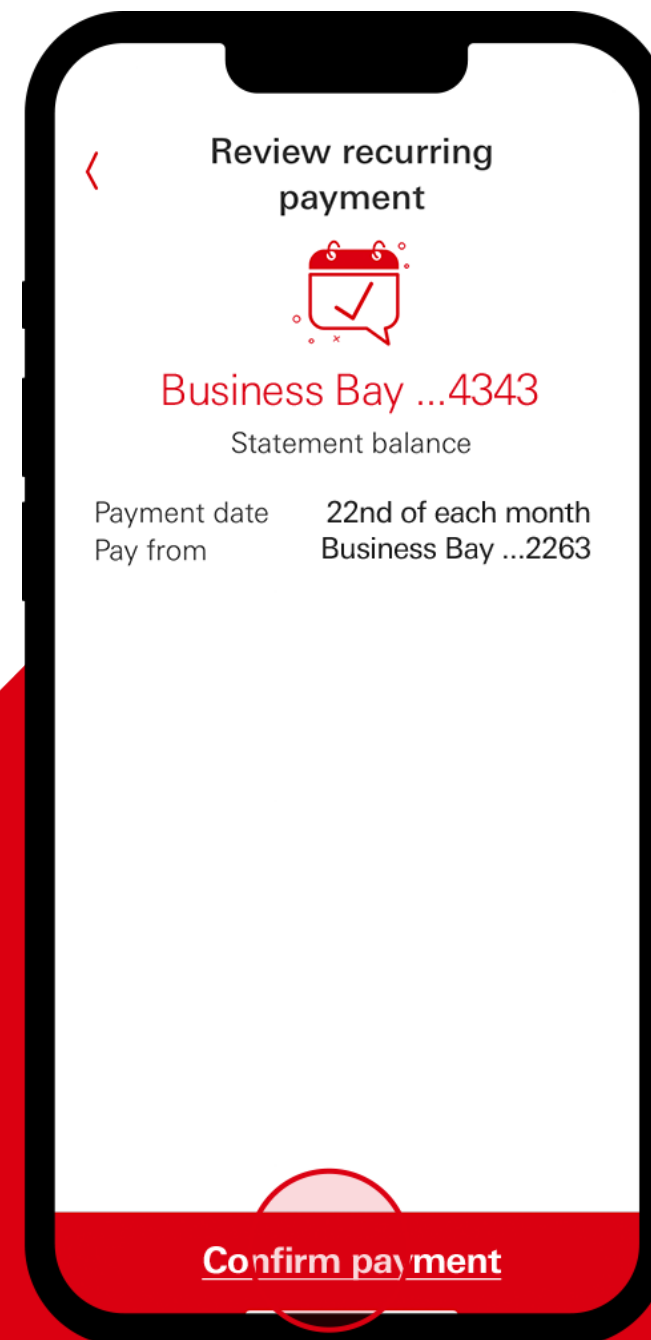
Select "Continue."



Set up recurring payments

Review your information.

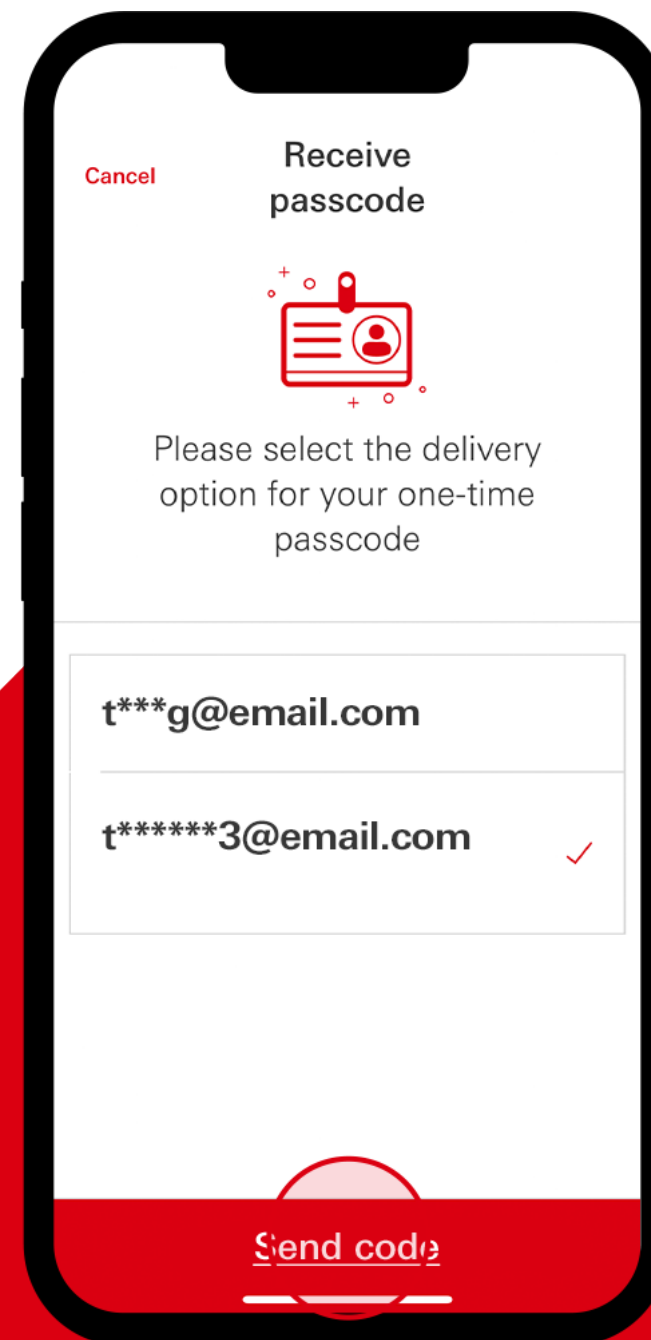
Select “Confirm payment.”



Set up recurring payments

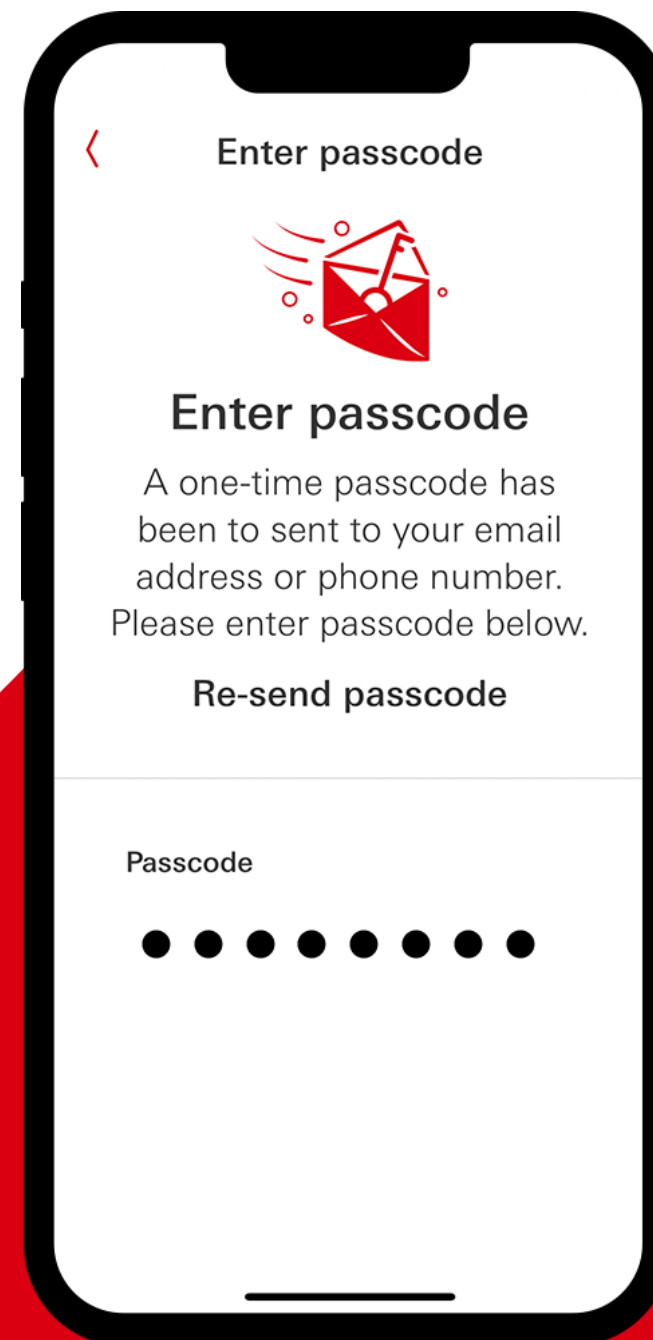
Select the delivery option for your one-time passcode.

Select "Send code."



Set up recurring payments

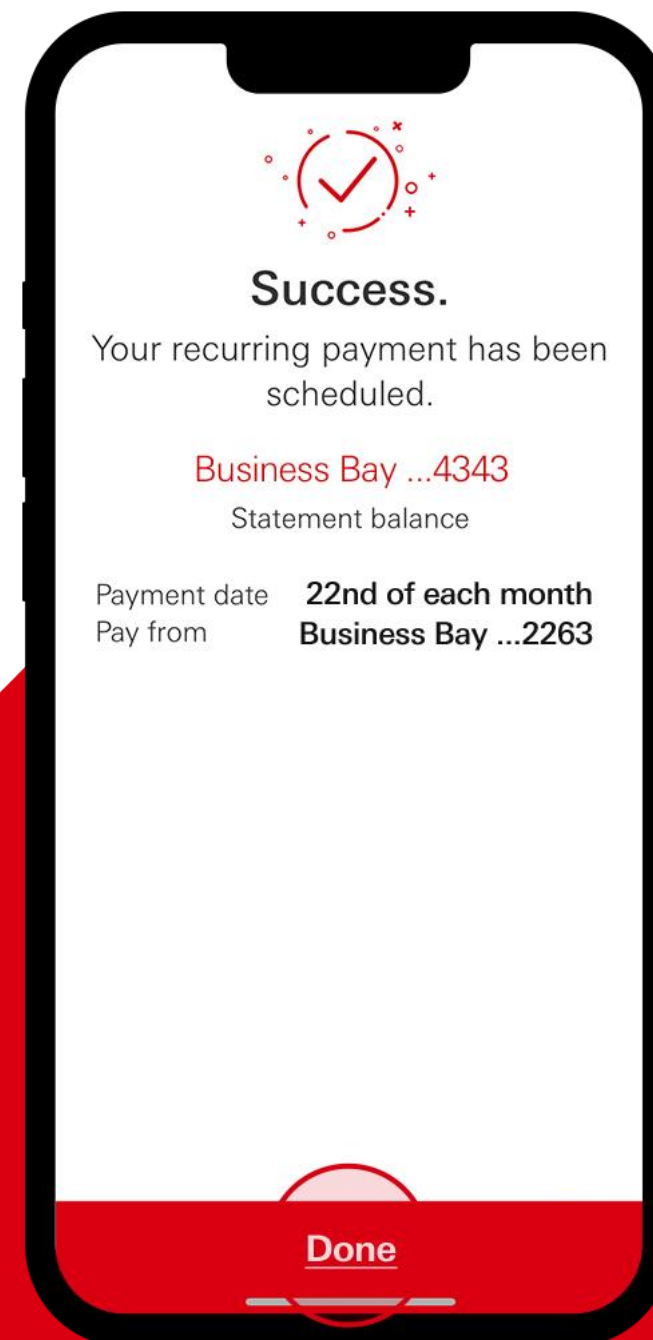
Enter your one-time passcode.



Set up recurring payments

Enter your one-time passcode.

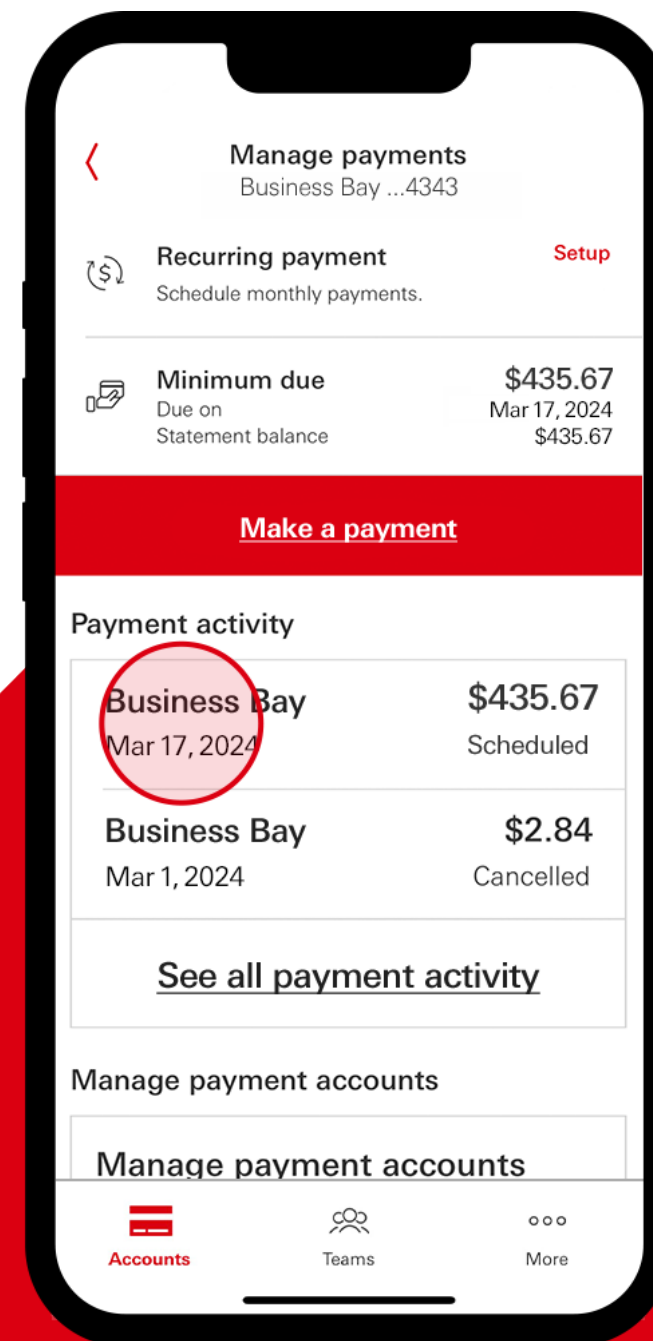
Select “Done” when complete.



Cancel a payment

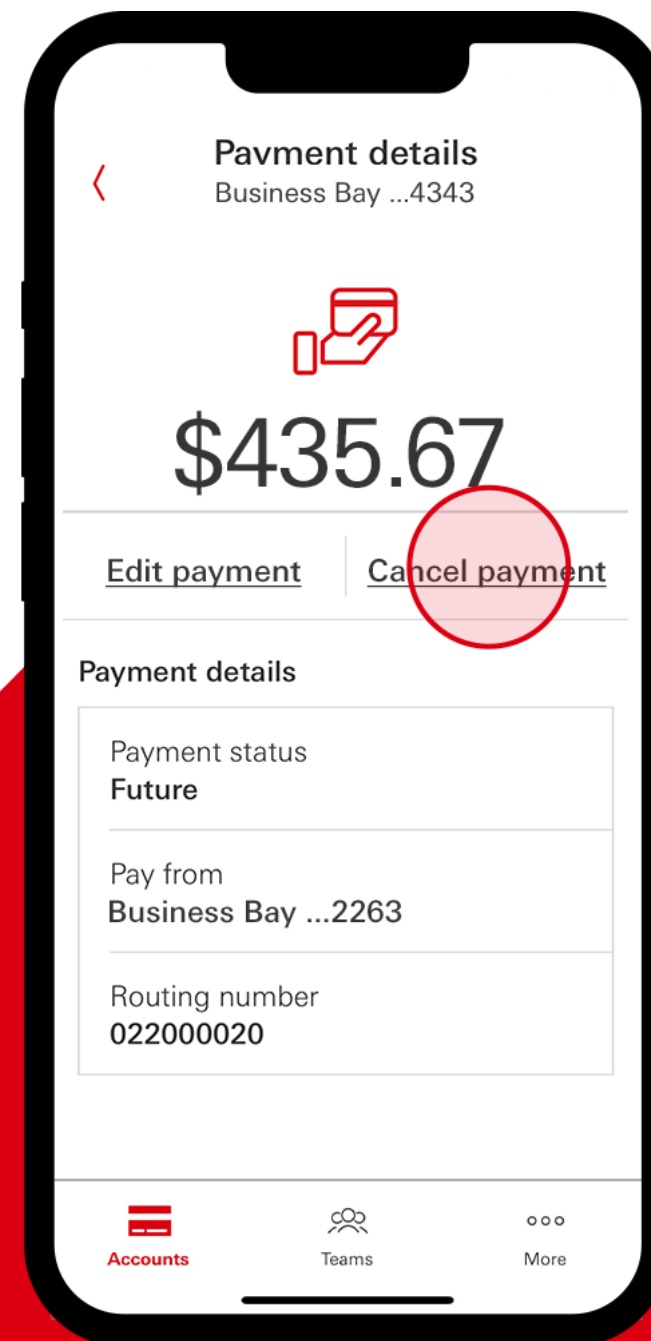
From the Accounts tab,
select “Manage payments.”

Select the payment you
would like to cancel.



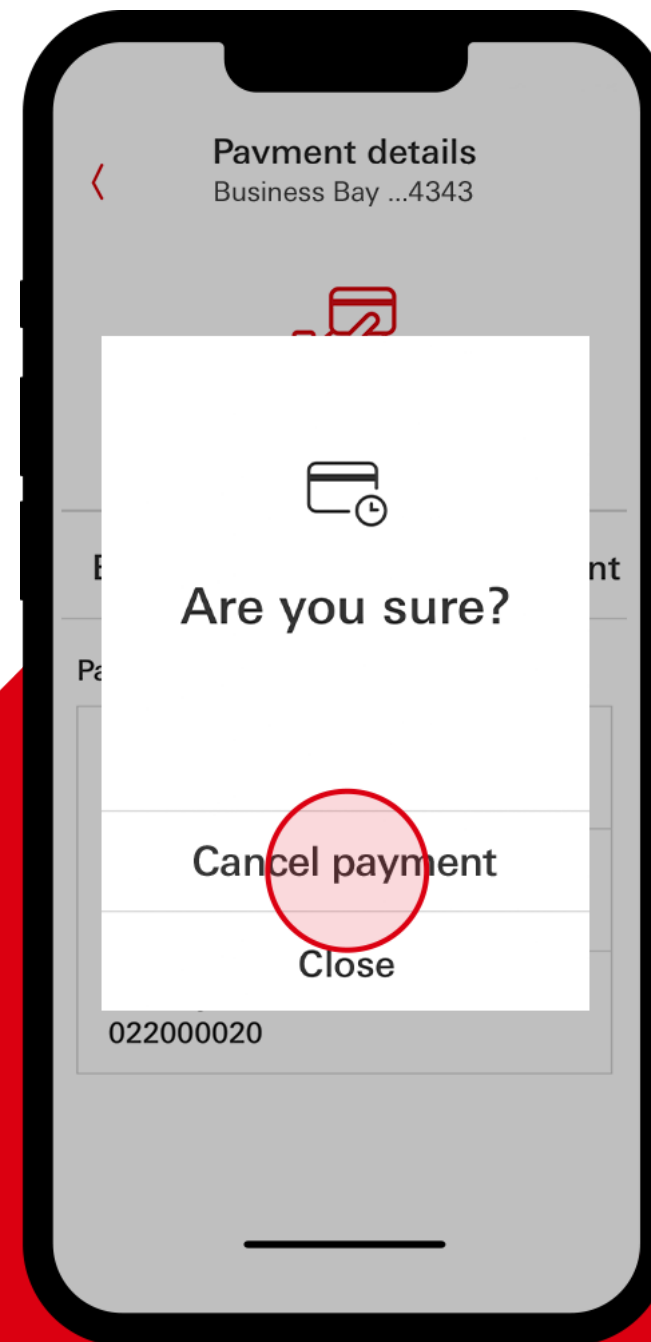
Cancel a payment

Select “Cancel payment.”



Cancel a payment

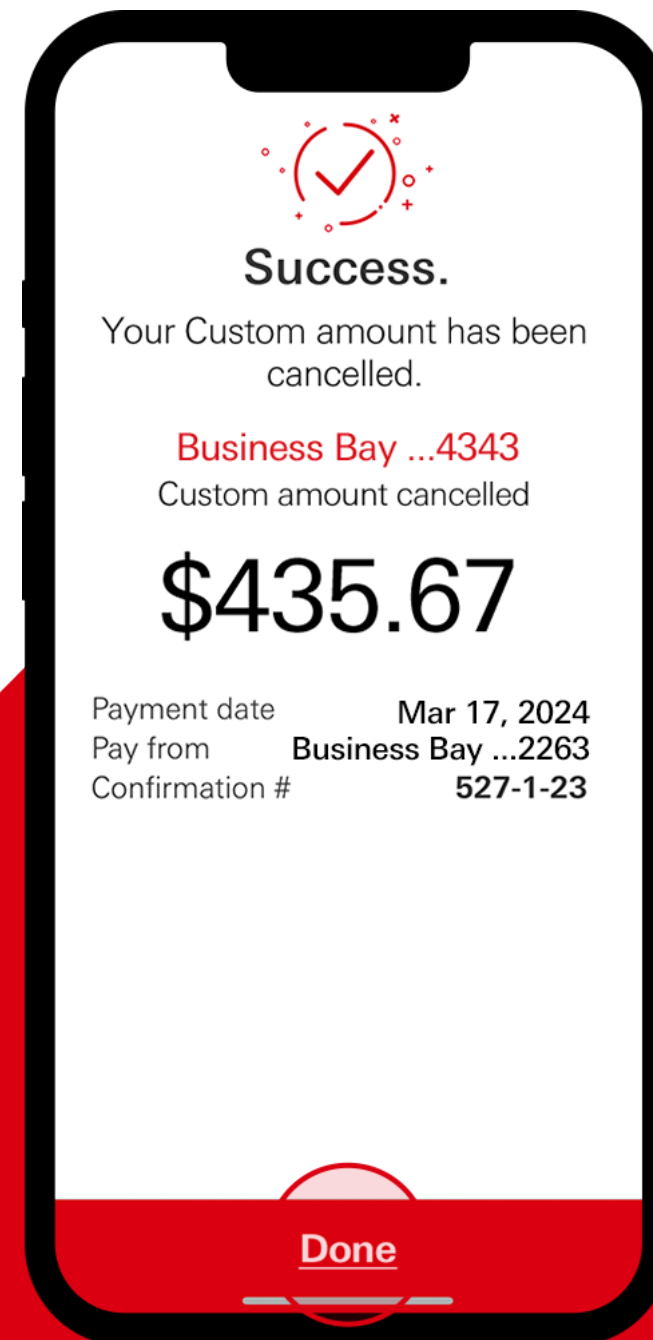
Select “Cancel payment”
or close the tab.



Cancel a payment

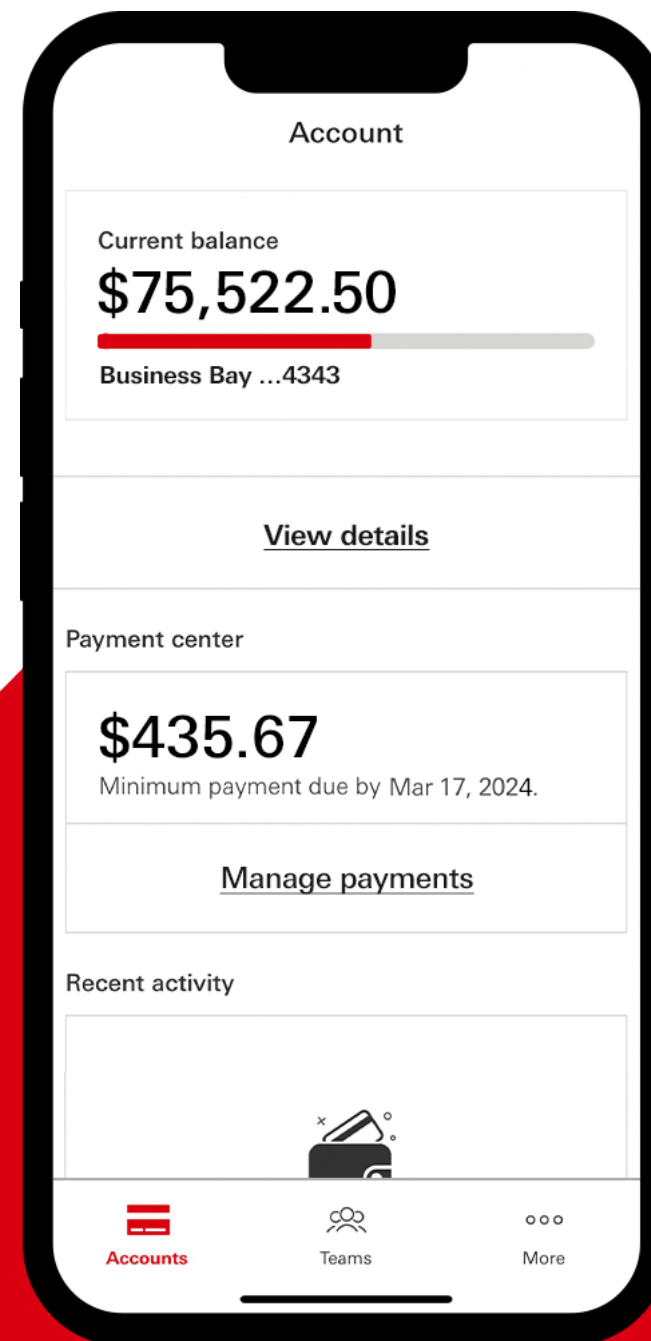
Select “Cancel payment”
or close the tab.

Select “Done” when finished.



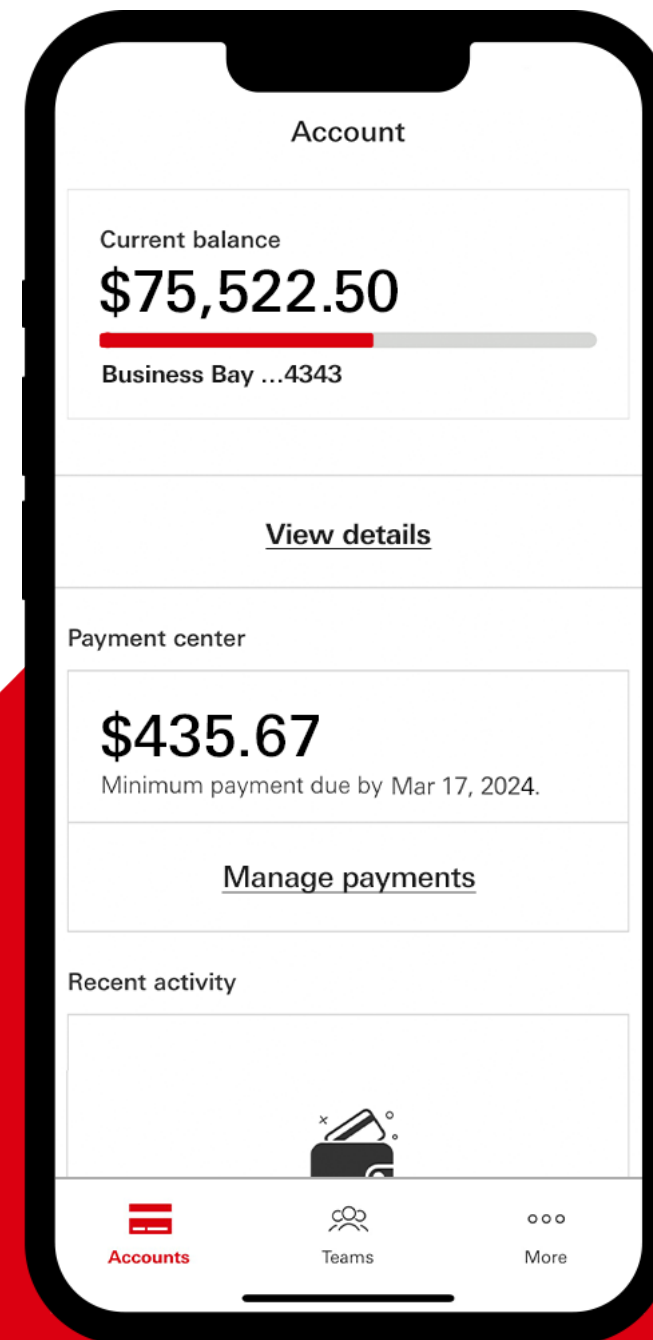
How to:

1. Sign in and register
2. Manage teams
 - Manage spend controls
 - View account
 - View transactions and statements
3. Manage payments
4. **Reset passwords and unlock accounts**



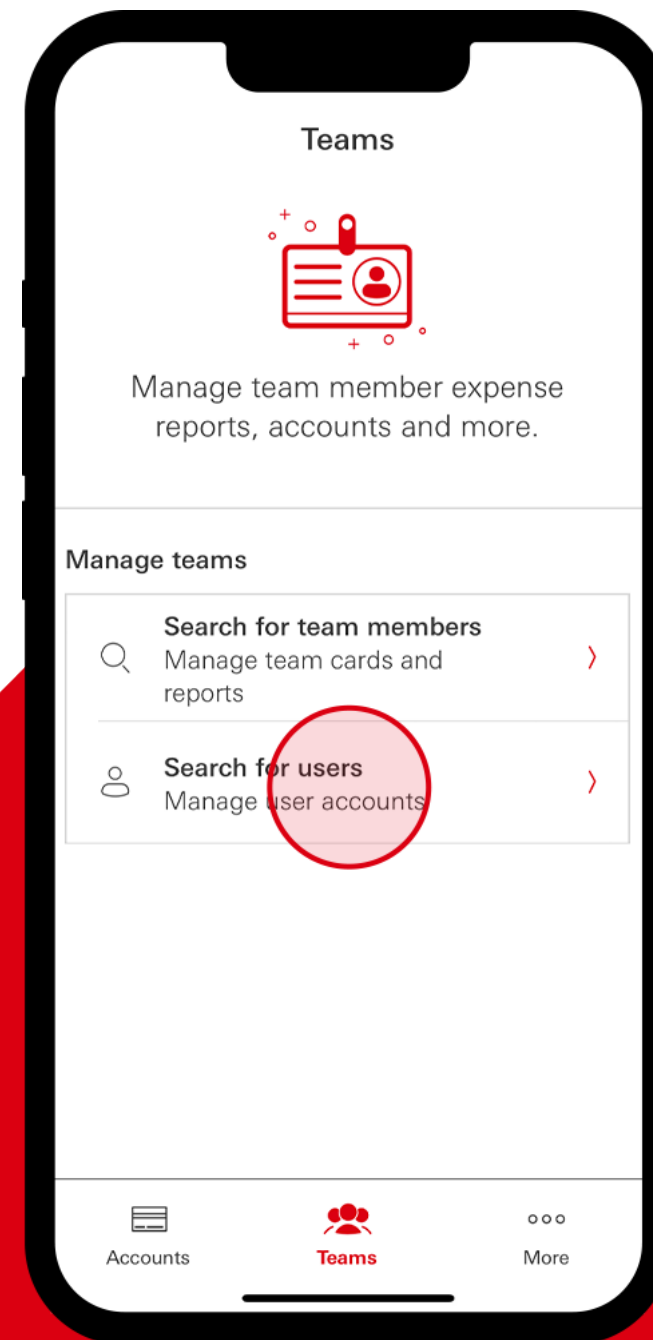
Select the Teams tab at the bottom of the screen.

Cardholder self-registration resets must be performed within the desktop version of the tool under the Manage Accounts module.



Select the Teams tab at the bottom of the screen.

Select “Search for users.”



Select the Teams tab at the bottom of the screen.

Select “Search for users.”

Enter search criteria and select “Search.”

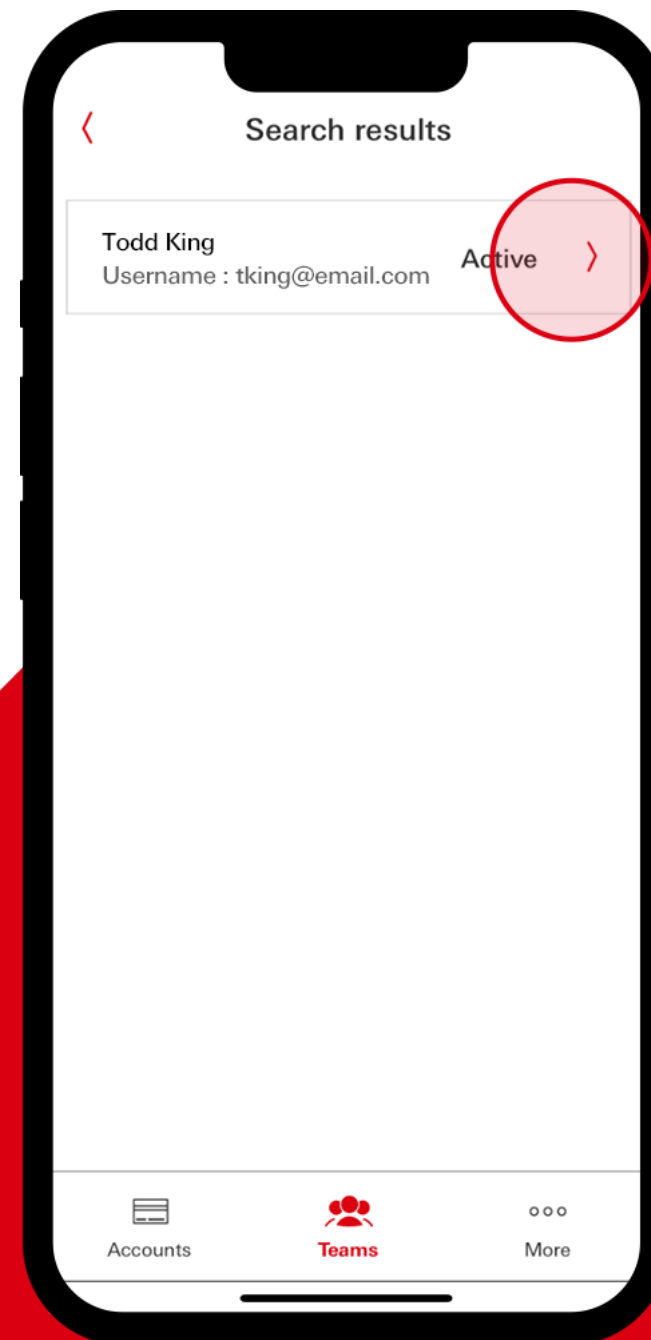
A screenshot of a mobile application interface for user search. The screen is titled "User search" with a "Cancel" button in the top left. Below the title is a "Search criteria" section containing several input fields: "Username" with a placeholder "Enter username", "First name" with the value "Todd", "Last name" with the value "King", "Email address" with a placeholder "Enter email address", "Unit name" with a placeholder "Enter unit name", and "Unit number" with a placeholder "Enter unit number". A red circle highlights the "First name" and "Last name" fields. At the bottom of the search criteria section is a "Search" button. The bottom of the screen features a navigation bar with three icons: "Accounts", "Teams" (which is highlighted in red), and "More".

Select the Teams tab at the bottom of the screen.

Select "Search for users."

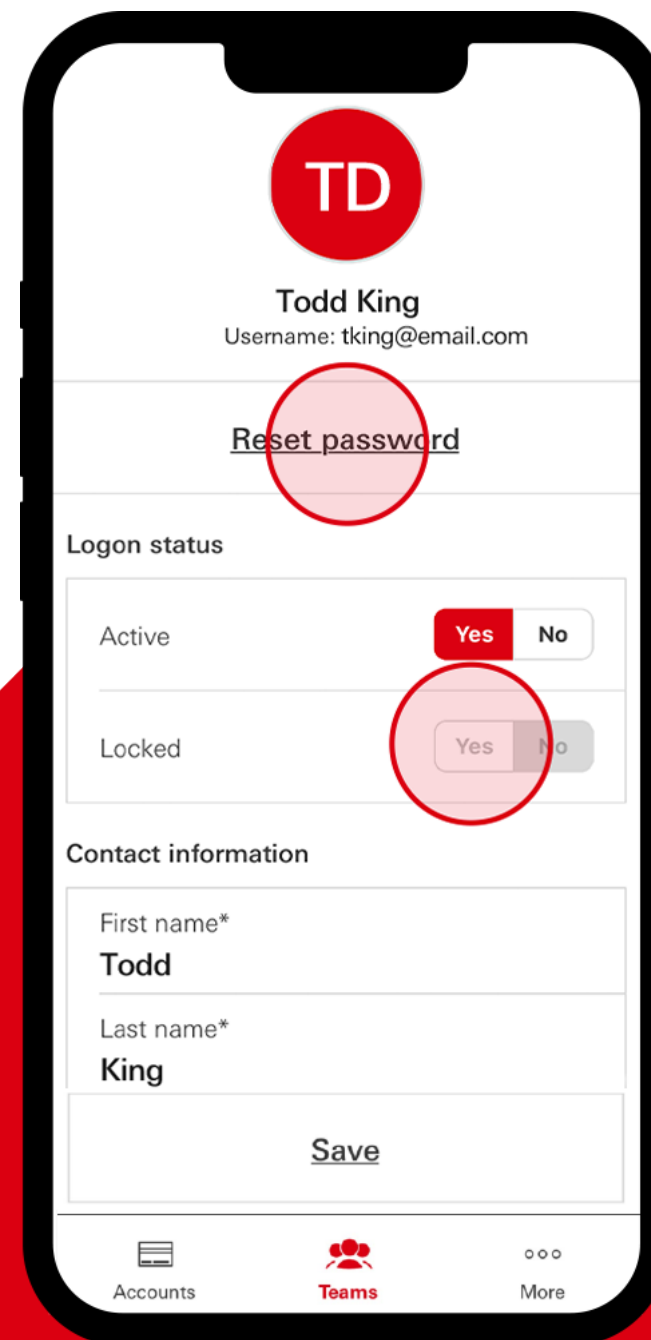
Enter search criteria and select "Search."

Choose user from the search results.



From here you can either reset the user's password or unlock the account.

Tap "Save" when you are finished.



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