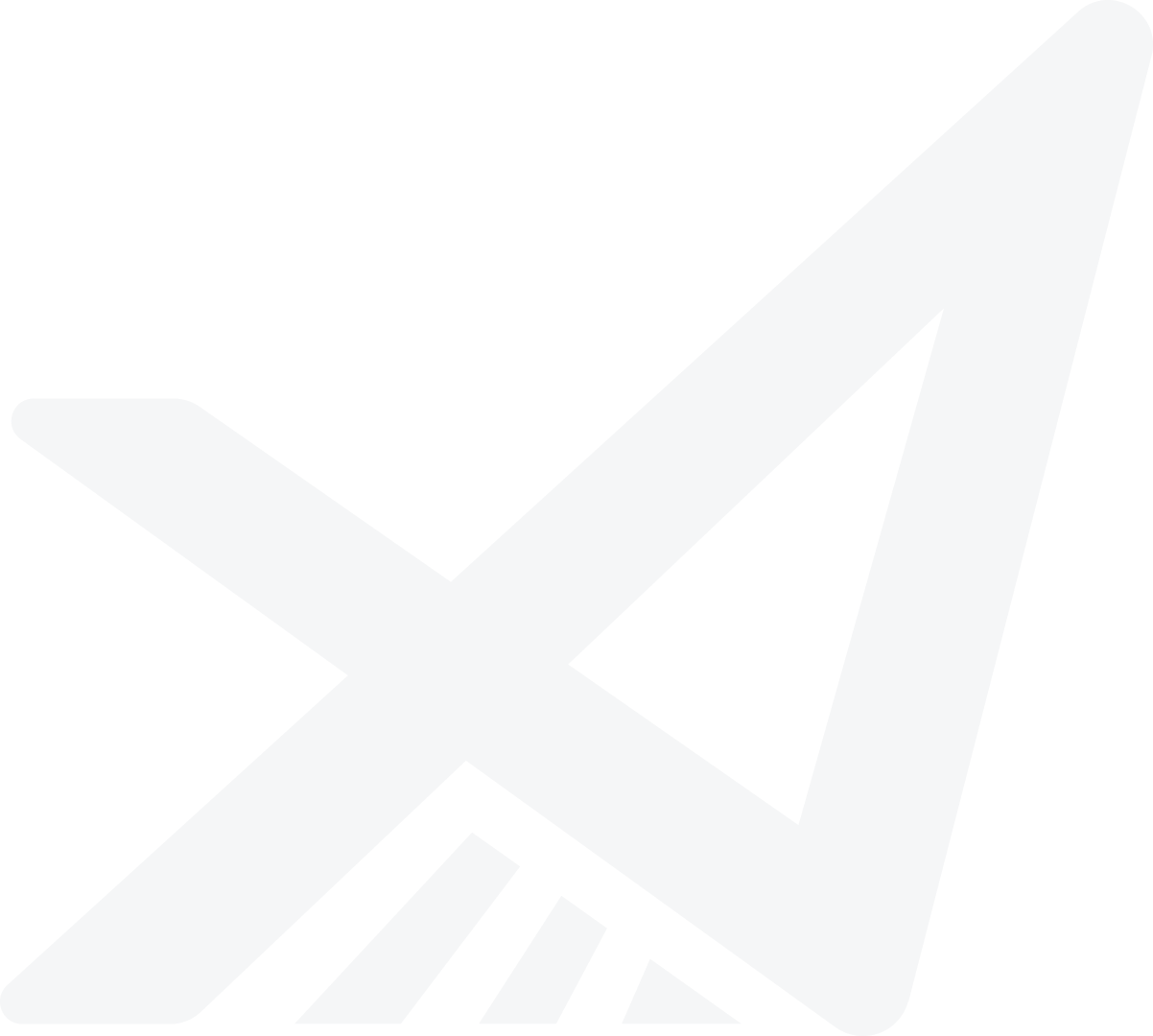


HSBC Requirements Q&A



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# Version tracking

|  |  |  |  |
| --- | --- | --- | --- |
| Author | Date | Version | changelog |
| Nicolas Berthet | 30.10.2019 | 1.0 | Document created |
| Michael Hoang | 30.10.2019 | 1.1 | Document updated |

# Purpose

This document summarizes the answers to questions raised during the meeting with HSBC team on October 21, as well as the conference call on October 29.

# HSBC Requirements

## Look and feel

* HSBC branded  
  *Yes, we currently support color themes and logo customization to reflect the HSBC identity*
* Look of the app icon  
  *Yes, this is customizable*
* Look of the graphic page & inner page icons etc.  
  *We do support logo & theming as mentioned above*
* Look of the chat window  
  *We do support logo & theming as mentioned above*
* Labels fine tuning (text)  
  *No, this cannot be customized, however, you can suggest edits/improvements through our feedback channels for us to consider in official releases*
* Loading screen  
  *Yes, the loading screen / animation can be customized*

## User Settings

* Change password for Staff
  + Staff password – password expiry/ reset and remember my password

*When SSO is not integrated, yes, passwords are managed by the LeapXpert platform.  
However, we expect HSBC to use SSO and in this case, passwords are managed out of the platform*

* Name visibility i.e. Name@HSBC  
  *Yes, this is supported. The display name is customizable*
* Finger print or face id for logon  
  *Yes, this feature is part of an upcoming release*
* What are we allowing for user to customize (what is standard, what is optional)
  + Default AD HR data for username and profile pic
  + Upload profile pic or use what’s in AD

*Yes, the RM details can be retrieved from HSBC AD and leveraged in our platform*

## Message Functionality

* Language as default, what languages are supported ?  
  *For messaging, any language can be used, all our UI/tools/analytics support international character sets  
  For the UI, we do support internationalization, and already support English, Chinese, Japanese & French. Additional language support is on our roadmap*
* Upper limit of characters in a message (if any)  
  *Our platform supports up to 2000 characters per message, but, due to other platforms limitations, messages may be segmented when sent out, for example, Line supports only 500 characters per message. Please refer to the technical specification matrix for more details.*
* Block audio/video call function (what can be blocked)  
  *Yes, this is supported, we can disable the audio/video call function on the tenant level, in your case, it could be disabled for a department/business unit*
* Upper limit of parties for a multiparty chat (is there one ?)  
  *Yes, we support up to 200 participants in a group chat*
* Mini app or native app? (Determine what works best for each Business Area)  
  *The integration can be different per client*
* Preview documents/ files before send (Y/N)  
  *Yes, this is supported*
* ‘Read message’ feature available ? i.e. double ticks  
  *This is on our roadmap, some platforms may not support it, please refer to the technical specification matrix for more details.*

## Message Admin (by users)

* Search Function on Chats ?  
  *Yes, this is supported*
* Rearrange chats, reorder chats (Prioritisation possible ?)  
  *Future plan, but this feature is not part of our current roadmap*
* Delete chats/ exit chats for group chats  
  *There is no plan to support data deletion, archiving chats is on our roadmap*
* Flag chats (Y/N)  
  *Future plan, but this feature is not part of our current roadmap*
* Archive chats (Y/N)  
  *This is on our roadmap*
* Disable ‘Session Expired’ in chats  
  *This is a restriction on some platforms, we are working to remove this limitation wherever possible (no longer happening on WhatsApp)*
* Participant Status notification (if someone leave/add to a chat, can we know?)  
  *This is on our roadmap*
* Share/ forward articles/ files to other chats/ channels (Y/N)  
  *This is on our roadmap*

## Notifications

* Message notification (including external view; internal view of the notification; the appear bar and bubble icon) 4 different views of notifications  
  *In push notifications, content is currently hidden for privacy/security reasons, the content can be displayed if configured on the tenant level*
* Enhance/Customise notifications section
* Allow notifications for offline messages (Y/N)  
  *Yes, this is already supported*

## Client Side

* Authentication process (are we comfortable with standard 2-factor authentication?)  
  *Yes, MFA is already supported*
* Frequency of authentication (gap between previous)  
  *Yes, this will be released within this quarter & configurable per tenant*
* Client password (clarify if we need client to create a password ? – prefer not to)  
  *For users using the LeapXpert client directly, this is necessary  
  For users using WhatsApp, Wechat or other integrations, it is not necessary*
* Client View (How can we distinguish between different HSBC staff contacting the same client)  
  *All messages are prefixed by the AM/RM name, which can be customized. If full-fledged multi-chat support is required, we would suggest to use the Wechat mini-app*
* Disclaimer page - wording  
  *Yes, this is customizable*

## Data Management

* Frequency of download chat log to our archive system.  
  *The frequency is customizable*
* Data retention on LeapXpert side (will LeapXpert keep a copy for data or not)  
  *In the case of HSBC, you will have your own “in house” deployment of the LeapXpert platform, LeapXpert (company) won’t have access to that platform, on top of which, all data in databases are encrypted using the encryption keys managed by HSBC.  
    
  LeapXpert collects anonymized usage data in order to improve the platform and user experience, while this usage data collection is a recommended opt-in, it can be disabled.*

## Admin Portal

* Ability to Extract user list for HR data reconciliation – frequency ?  
  *Yes, this is supported through APIs, and, in the case of SSO/AD integration, the deactivation of a user will be reflected automatically.*
* Business Hierarchy – Entity / Line of Business / Business Areas / Teams ?  
  *This is on our roadmap*
* User Rights (Super Users / Normal users)  
  *Yes, this is supported.  
  LeapXpert has the notion of administrators and account managers.  
  Additionally, finer grained permission management is also on our roadmap.*
* Reports / MI – some initial ideas around reports / regular MI – is there a standard suite ?  
  *Yes, we do provide reporting.  
  The data is also available through APIs for external processing / collection.  
  Additional reporting is on our roadmap*
* Billing Mechanism – how to break down Business Area billing.  
  *Yes, our platform is multi-tenant, and usage data is available for each tenant*

## Others

* + Possible to Add ‘How To’ section in Menu? (For Staff)  
    *Future plan, but this feature is not part of our current roadmap*  
    *We currently provide supporting material for different types of users (administrators, account managers).*