

BEA Corporate Online

Administrative Transaction: Manage Beneficiaries

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The Bank of East Asia, Limited

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1. Manage Beneficiaries – (BEA (HK)/BEA China/Local/Overseas)



How to get there

The Authorised Person(s) (“AP”) can add or delete designated beneficiary for easier fund transfer setup and to enjoy higher daily transaction limit.

a. Menu > Transfers> Set Up > Manage Beneficiaries > Create

The screenshot shows the BEA Corporate Online interface with the following steps highlighted:

- 1.1**: The main menu icon (three horizontal lines) is highlighted in red.
- 1.2**: The 'Transfers' option in the left-hand menu is highlighted in red.
- 1.3**: The 'Set Up' option under the 'Transfers' menu is highlighted in red.
- 1.4**: The 'Manage Beneficiaries' option under the 'Set Up' menu is highlighted in red.
- 1.5**: The 'Create' button in the 'Manage Beneficiaries' section is highlighted in red.

The interface displays 'Pending Approvals (0)' and a table with columns: Date, Transaction Name, Company Name, Initiated By, Reference No, and Status. The table is currently empty, showing 'No data to display.'

b. Quick Search> Manage Beneficiaries

The screenshot shows the BEA Corporate Online interface with the following steps highlighted:

- The search bar at the top is used to search for 'Manage Beneficiaries'.
- The search results dropdown shows 'Set Up - Manage Beneficiaries' as the selected option, highlighted in red.

The interface displays 'Pending Approvals (0)' and a table with columns: Date, Transaction Name, Company Name, Initiated By, Reference No, and Status. The table is currently empty, showing 'No data to display.'

c. Quick Link > Manage Beneficiaries

Quick Links

User Management

User Accounts and Services Access

e-Statement & e-Advice User Registration Overview

Daily Transaction Limit Maintenance

Manage Beneficiaries

Step
01

Initiate

1. Enter the beneficiary's name and/or upload the beneficiary's photo.
2. Select the Transfer Type as BEA (HK), BEA (China), Local, or Overseas.
3. Select/enter the beneficiary's information.*
4. Click on "Add" to continue.

* The Template ID and Template Name must be unique.

(The below step uses adding a BEA(HK) account as an example)

Add Beneficiary

Bank Account

Account Number

Company Name

Template ID (Used for 'Manage Beneficiaries' Only)

Beneficiary Photo

Upload Photo

Max file size - 1000 KB
File format - .JPG and .PNG

Transfer Type

BEA (HK)

Local

Overseas

BEA (China)

Beneficiary Account Number

Get Beneficiary Account Name

Beneficiary Account Type

Please select A/C Type ▼

Template Name

Phone Banking Beneficiary

Notes:

1. Registration of a new beneficiary will be effective on the next calendar day.
2. Deletion of a registered beneficiary will be effective immediately.
3. Add/Deletion of Beneficiary service hour:
Mon to Sun
00:00 - 18:00

Add

Cancel

Back

Step
02 Verify

1. Verify the beneficiary details.
2. Click on “Confirm” to continue.
3. Click on “Back” to edit previous details.
4. Click on “Cancel” to return to the dashboard.

Add Beneficiary

Review
You initiated a request for Add Beneficiary - Internal Transfers. Please review the details before you proceed.

Account Number
015

Company Name
.

Template ID (Used for 'Manage Beneficiaries' Only)
testing123

Transfer Type

Beneficiary Account Number
015

Beneficiary Account Name
Y***

Beneficiary Account Type
Statement Savings

Template Name
testing123

Phone Banking Beneficiary
No

Notes:

1. Registration of a new beneficiary will be effective on the next calendar day.

2. Deletion of a registered beneficiary will be effective immediately.

3. Add/Deletion of Beneficiary service hour:
Mon to Sun
00:00 - 18:00

Confirm
Cancel
Back

Step
03 Successful Submission

1. Transaction Reference Number will display upon successful submission of the request.
2. The Approve / Reject flow is required to complete the request. For details, please refer to the Approval Workflow guide.

Add Beneficiary

✔ **Confirmation**
Your Add Beneficiary - Internal Transfers request has been sent for approval.

Transaction Reference Number

Status
Pending Approval

Account Number

Company Name

Template ID (Used for 'Manage Beneficiaries' Only)
testing123

Transfer Type
Internal

Beneficiary Account Number

Beneficiary Account Name

Beneficiary Account Type
Current

Template Name
testing123

Phone Banking Beneficiary
No

Notes:

1. Registration of a new beneficiary will be effective on the next calendar day.
2. Deletion of a registered beneficiary will be effective immediately.
3. Add/Deletion of Beneficiary service hour:
Mon to Sat
00:00 - 18:00

What's Next?

 [Go to Dashboard](#)