

hylobiz

RECEIVABLES

PAYABLES

DIGITAL LEDGER

AUTOMATED REMINDERS

AUTOMATED RECONCILIATIONS

STOCK HOUSE

BANKING MARKETPLACE

API MARKETPLACE

hylobiz

BUSINESS BANKING REDEFINED



RECEIVABLES



Send invoices on the go

Create or Upload invoices and send them instantly by WhatsApp, SMS, Email



Link your Accounting Platform

Connect hylobiz with your accounting platform for a complete seamless and automated experience.



Itemise your Invoice

You can add items in your invoice and let your customers know what they are paying for.



Customers can pay using any online payment method

Your customers can pay you using Credit / Debit Card, Net Banking and UPI.



Track Payments Easily

Mange your transactions, reconciliations and settlements



Customized Checkout UI

Get customized checkout User Interface with your logo.



Customizable Transactional Charges

You may keep the transactional charges or choose to pass them to your customers.

Hylobiz Receivables help you digitizing your collection process. You get the power to send your invoices or pro forma to your customers with a secured payment links giving multiple payment methods to your customers to make digital payments.

Connect your Accounting Platform with Hylobiz or just upload your invoice file to kick start your digital collections with a simple two-step process.

Alternatively, create and email professional invoices so that your customers, wherever they are, can pay you faster.

FEATURES

- Collect Single Payment
 - Send Collect Link through SMS, WhatsApp or Email
- Collect Bulk Payments through File Upload
 - Send Collect Links through SMS, WhatsApp or Email
- Create Invoice
 - Attach Secure Link
 - Add Additional Notes
 - Auto update Stock House
 - Save as Draft
 - Save and Send
- Create Pro Forma Invoice
 - Attach Secure Link
 - Save as Draft
 - Save and Send
 - Manually Convert to Invoice
 - Auto convert to Invoice if your Customer has paid online
- Send One Click Payment Reminders through WhatsApp, SMS and Email
- Cancel Transaction
- View Transaction History
- Collect offline payments for a perfect reconciliation

VM-HYLOBZ

Hi XYZ,
You have got a payment request of ₹ 1,000.00 for Ref-TESTJUNE072020 from ABC Enterprises.
Kindly make online payment using the secure hylobiz link - <https://hylo.biz/neobank/Pay/2317986505> on or before Jun 15, 2020

Pay To
ABC Enterprises
₹ 1,000.00

LOGO

CARDS

NETBANKING

UPI

PAY NOW

RECEIVABLES





AED





PAYABLES



Pay your Vendors

Simplify the process of paying your vendors and business partners on time.



Reimburse Employee Expenses

Reimburse all your employee expenses at the same time.



Works Even on Bank Holidays

Process payments with payouts easily, even on weekends and bank holidays!



2 Factor Authentication

Keeps the strong control in your hand. Requires your authorization before the funds are dispensed.



Track Payments Easily

Manage your transactions, reconciliations and settlements

Hylobiz automates payouts fully via APIs AND offers a much simpler alternative to uploading files on a bank portal.

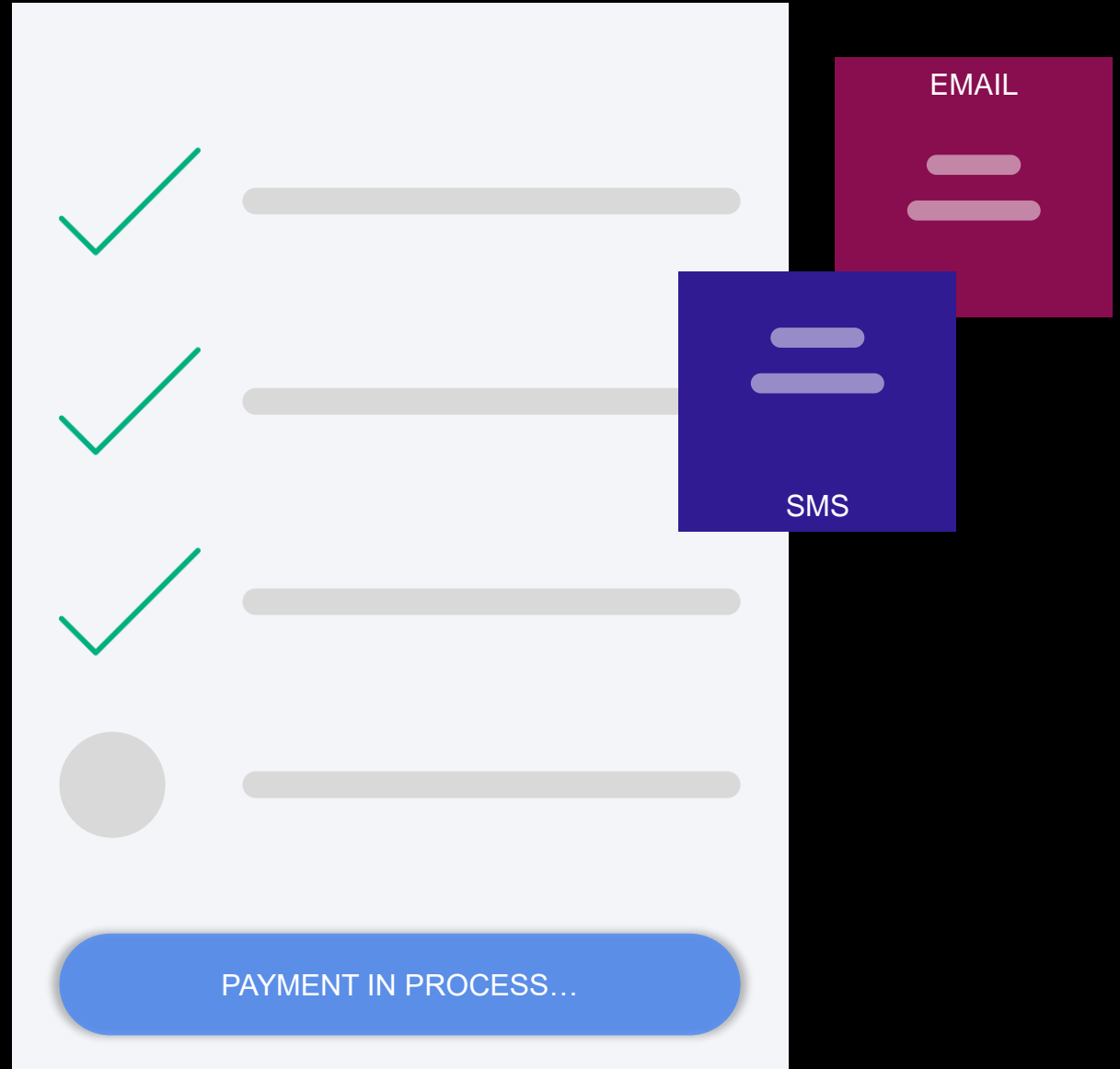
Unlike banks, where you can only make a transaction and then manually update the reference numbers in your accounting platforms, Hylobiz helps you automate this process .

You can quickly link your beneficiaries and conduct transactions even on bank holidays.

Lastly, all of this can be automated and built into your product or internal systems using our powerful APIs.

FEATURES

- Make Payment
 - Add beneficiary and make payments using your Net Banking, Cards or UPI.
- View your business health through powerful Transaction Dashboard
- View Transaction History
- Collect offline payments for a perfect reconciliation





DIGITAL
LEDGER



Manage your Contacts

Your contacts are automatically picked up at the time of your transactions, alternatively, you can add them manually too.



Configure your Terms

You can configure different terms of business at each contact level.



Powerful Dashboard

Dashboards at each contact level helps you keeping a tap on overdue and upcoming transactions.



Record all Business Details

You can save critical business details like Bank Account, PAN Number, GST Number securely and take off the worry of maintaining a physical diary.



Online Access

Your contacts can access the ledger from anywhere, anytime and any device round the clock.



Create your Distribution Network

You can create your own distribution network. All your distributors can perform transactions through one common platform.

Hylobiz helps you creating a powerful network of Digital Ledger between you and your contacts. This helps bringing absolute business transparency.

The ledger setup starts automatically as soon as you initiate your first transaction. You can also switch on the setting to automatically share the ledger with your contacts. All historical transactions are visible and can be served as a statement of proof to collect the money through secured collection links.

You can also create your own distribution network by selecting the type of your contact as a Distributor. This helps you to get the Purchase Orders and Invoice process digitized through the same platform.

FEATURES

- Add Contact
 - Add a Single Contact
 - Add Multiple Contacts through File Upload
- Maintain Business Details of the Contact like Address, PAN Number, GST Number, Bank Account Details etc.
- View business dashboards at each contact level with Overdue and Upcoming Transactions.
- View detailed Ledger covering all the debits and credits
- Share Digital Ledger along with Invoices.
- Add a Contact as a Distributor to create your distribution network. Contacts marked as distributors can create and send Purchase Orders directly on Hylobiz. All Purchase Orders can be converted into Digital Invoices with option of adding secure payment links.

Digital Ledger

From

To

search

Particulars	Credit	Debit



Automated
REMINDERS



Configure Rules

You can set your own rules and frequency of reminders for all customers or at each contact level.



Configure your SMS

You can configure the SMS text basis on your business requirement.



Configure your Email

You can configure the SMS text basis on your business requirement..

Get rid of telephonic calls, WhatsApp messaging, SMSing and emailing for your payments. Hylobiz gives you a powerful way to set your own rules for sending reminders and ensures to nudge your customers with overdue payments through SMS, Email and WhatsApp.

You can also define your own SMS and Email templates apart from choosing rules for each customer.

Hylobiz helps you save hours of manual chasing which you can focus on generating additional revenue.

FEATURES

- Customize Templates for each contact
- Powerful Rule Engine helps you define at what stage of transaction you want to send a reminder, frequency and duration of reminders.
- Configure the SMS Template of your choice. The pre-populated placeholders help your template to fetch relevant information which is picked up from your transactional data.
- Configure the Email Template of your choice. The pre-populated placeholders help your template to fetch relevant information which is picked up from your transactional data

The screenshot displays a configuration interface for reminders. At the top, there are two grey rectangular input fields. Below them, the text "When do you want to send?" is followed by a dropdown menu currently showing "After Due Date". Underneath the dropdown, there are two input fields: the first contains the number "3" and is followed by the text "day(s) After Due Date and On every", and the second contains the number "5" and is followed by "day(s)". To the right of these fields are two overlapping menu cards: a purple one labeled "SMS" and a red one labeled "EMAIL", both featuring a hamburger menu icon. At the bottom, there is a section titled "SMS Template" with a blue "Insert Placeholder" button. The template text reads: "Reminder! Hi, your payment to ABC is due on {{.DueDate}}.Amt-{{.DueAmount}}. Ignore if paid."

An illustration featuring a large laptop screen as the central focus. The screen displays a software interface with a blue header, a sidebar menu on the left, and a main content area containing a grid of data cards. Three stylized human figures are positioned around the screen: a woman in a pink dress on the left, and two men in suits (one blue, one green) on the right who are holding a large blue document or card together. The background is dark with abstract, colorful shapes in shades of blue, teal, and orange. The text 'Automated RECONCILIATION' is located in the bottom right corner.

Automated
RECONCILIATION



Real Time Status Update

The transaction status gets updated as soon as the payment is done.



Unique Payment Identity Number

Each transaction gets a Unique Payment Identity Number to help you map with your own transaction reference numbers



Captures Payment Mode

The process captures each mode of payment used to finish the transaction. It helps you reconciling back from any other third-party platform.



Track Transaction Status

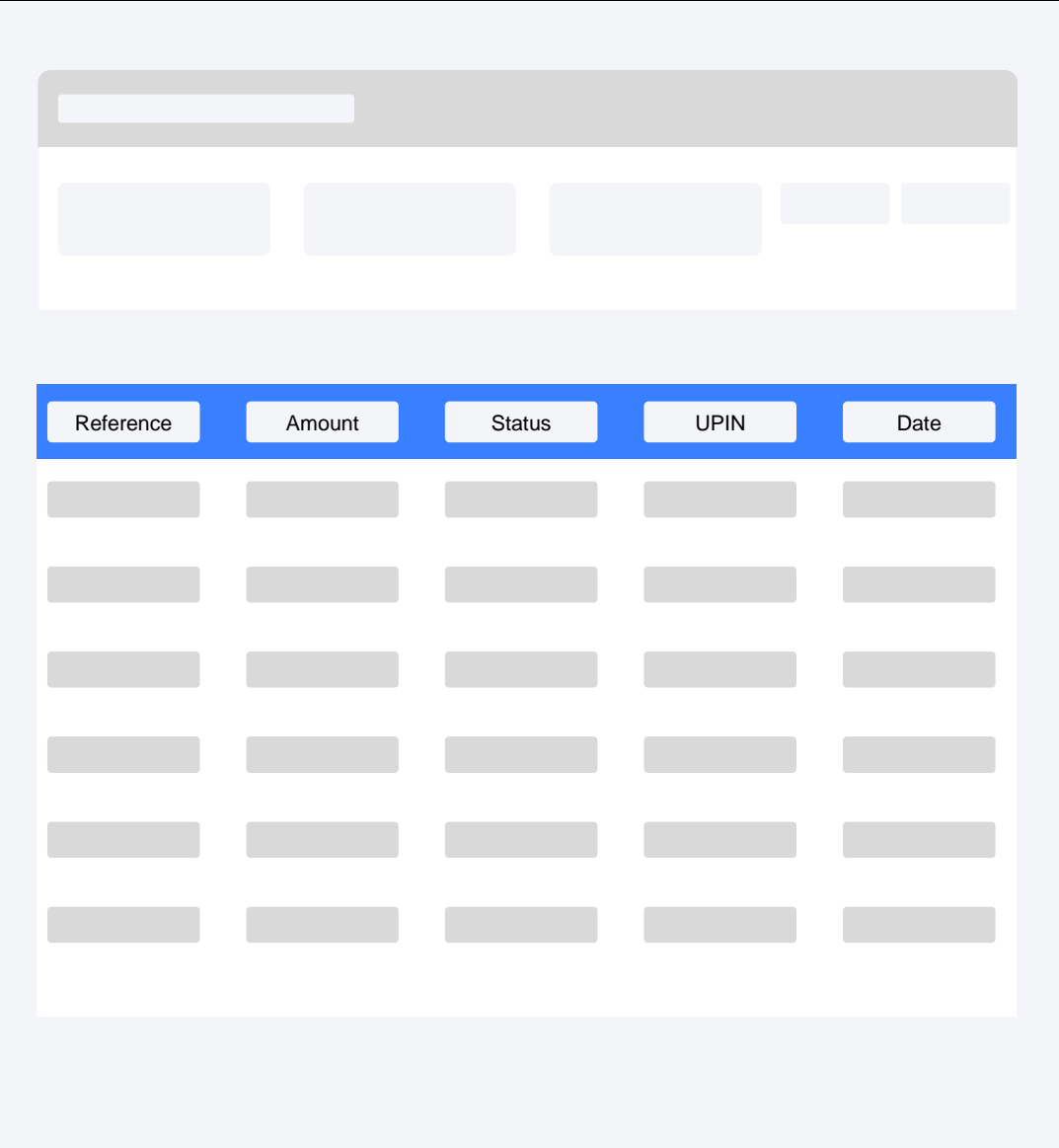
All the transactions' status are updated in real-time to help you track the progress end-to-end.

Hylobiz helps you with automated reconciliations of your banking transactions. All your receivables and payables are consolidated and updated in a single report with a Unique Payment Identity Number. Each of your Transaction Reference is mapped to this Unique Payment Identity Number.

No matters if your payments are done in parts or full, the platform takes care of managing the audit trail of the transaction. The Reconciliation Report is accessible from anywhere, anytime. Any payment mode is recorded to ensure a transparent tracker and closure.

FEATURES

- Multiple filters available to apply dedicated transaction search.
- Detailed report at each transaction level.
- Option available to download the report in XLS format.
- API available to get the status for the digital transactions.





STOCK HOUSE



Business Dashboards

The business dashboards help you to keep track of your stocks which are running low or has expired.



Supports Service based Businesses

If you are a Service based business, then also you can list your services to keep track of your rates and generate invoices instantly.



Avail your Stock to your distribution network

Your distribution network on Hylobiz can directly raise Purchase Orders for any item in your Stock House, provided that the items are set for Public mode.



Auto Update Stock Status

The Stock House updates the Status Automatically as soon as an Invoice is paid by your Customers. Thus helps giving you a much strong control.

The Stock House is a very innovative inventory management solution which helps you to keep track of your stocks smartly. While you see the status through regular dashboards, the solution helps you to even list your items in Public and Private Modes.

If any item in the Stock House is Public and you have created your distribution network on Hylobiz then your distributors can access your stock house to raise a Purchase Order. This helps you keeping control of your pricings even at a secondary sales level.

The Stock House solution can be used both by inventory and non-inventory led businesses. The non-inventory led businesses like consultants can add their Services in place of physical goods.



**BUSINESS
SETTINGS**



Enable Digital Ledger

Allow your contacts to access their Digital Ledger maintained with your business



Enable WhatsApp Notifications

Allows you to receive WhatsApp Notifications



Set Taxes, Discounts and Other Charges

View, add and edit tax, discount and other charges that you may want to pre-configure.



Edit User Information

Edit your personal information appears on transactions, emails, SMS etc.



Connect with 3rd Party Application

Connect your accounting/billing/ERP applications



Configure File Formats

Configure the File Format for your Bulk File Upload



Create Team

View, Add and Edit your Team

You can manage rest of your background processes from Business Settings section. You can edit your business information, change your Sign In password, create your team, configure taxes etc.

AVAILABLE ON



hylobiz

CONNECTED BANKING | NEOBANKING

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