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Policy Issuance Engine (PIE)

FAQs

(Version 1.2)

Date: 11th April'22

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We have consolidated common problem areas for ease of our PIE User's, where user can understand the problem and they will be able to coordinate with exact team directly.This will reduce resolution turnaround time on most of their common problems.

1. Whatif I'm Unable to login / Unauthorized access in to PIE

Sign in to Policy Issuance Engine

All fields are mandatory.

Username

Username

Please Enter Username.

Password

Password

Please Enter Password.

Login

Unauthorized Access.

Forgot Password ?

Answer:
A. If you are getting above error message, Please follow the below steps –

2. Please click on 'Forgot Password?' Option provided on Login Page.
3. Enter User name, Security Question and Answer.
4. Click on Submit.
5. You will receive a Password email on your registered email id.
6. Please login with revised Password.

B. You can also use 'Reset Password' option provided in GC to reset your Password. After successful password reset, login in PIE with new Password.

C. If your user id was created in GC today then it will be active in PIE on next day. Hence, in case of new User id, user needs to try login into PIE application on next day.

D. If problem still persist, please send your mail to PIE.SUPPORT@HDFCERGO.COMby mentioning your User ID and error screenshot.

2. What if I get 'Invalid match for Business Location' message?
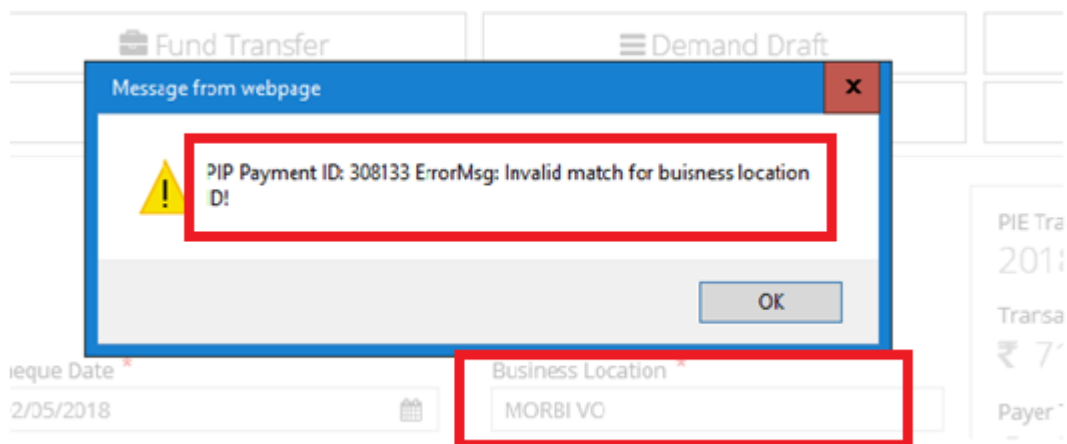
Answer:

A. If you are getting above error message, Please follow the below steps –

1. Please check Business Location seen on Payment Page.
2. Raise a ticket with GC support for mapping of Business location against your User id. Here, you need to provide GC Intermediary Code, User ID and Business Location while raising your request with GC team.

3. To raise a ticket with GC support –

   - Internal HDFC ERGO users can raise a ticket through 'Manage Engine Service Desk' to do so please click on below URL –

   http://10.62.211.26:8000/

   - Internet User's (outside HDFC ERGO domain) / dealers can send mail to below email id directly.

   gcprod@hdfcergo.com

   (Please Note – Internal User's/ domain user (e.g. ...@hdfcergo.com) cannot use above mail id for ticket logging.)

3. Getting message 'Channel details not found, please contact system administrator'

Answer:

A. If you are getting above error message, Please follow the below steps –

1. Please send mail to ChannelSetup@hdfcergo.com by mentioning
   - your GC Intermediary Code,
   - Name of Product to map particular channel / product against your GC Intermediary Code.

B. If problem still persist post confirmation from channel setup team, please send your mail to PIE.SUPPORT@HDFCERGO.COM along with confirmation mail from Channel setup team and revised error screenshot.

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4. How can I check reasons for account lock

Answer:

A. If youare getting error message as "You are not authorized to tag payment as your account is locked", it means your account is locked, Please follow the below steps –

1. If account is locked, you will get to know the reason behind locking at the time of Payment tagging.
2. Alternately, you can click on '**Create Payment**' option on Home Page, then proceed to '**+Add Payment**' option and system will show the Inward Pendency which cause locking of user account.
   Below screenshot FYR –
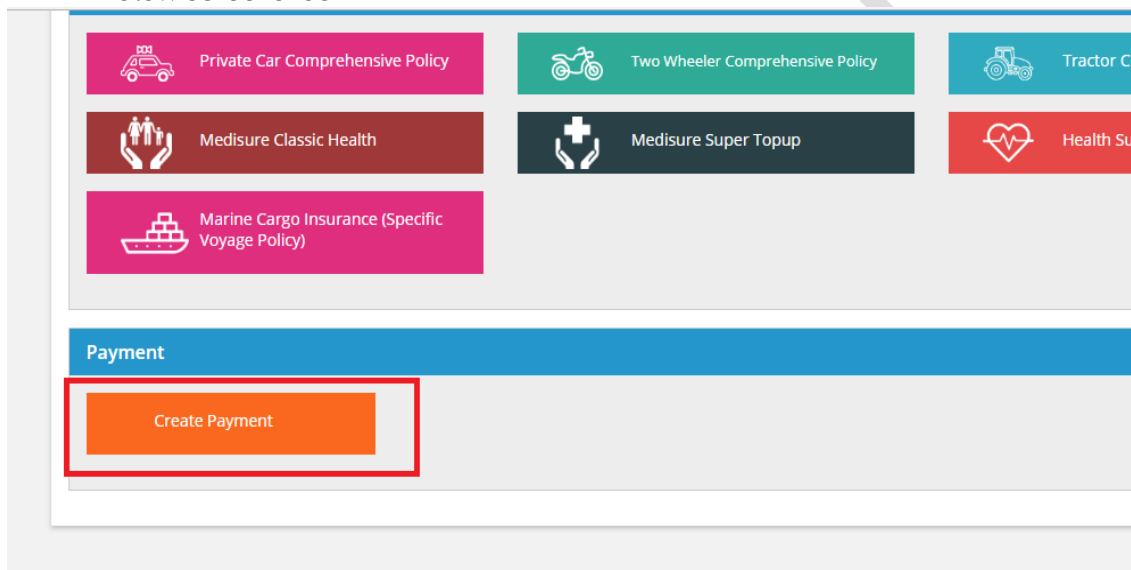
Account Locked - With Following Pendencies

Customer/Payer	Document Number	Document Date	Type	Status	Amount
ASHISH H KESHARI	2857201077330601000	11/05/2018 00:00:00	Renewal Business	Document Pending	8090
ASHISH KUMAR KESHARI	2857201079881001000	11/05/2018 00:00:00	Renewal Business	Document Pending	15058
ASHISH CHANGED NAME	1004622649	09/05/2018 00:00:00	C	Payment Pending	21004
ASHISH CHANGED NAME	1004622664	21/05/2018 00:00:00	C	Payment Pending	36219
NIVIDA PATIL	1004622677	12/05/2018 00:00:00	C	Payment Pending	10583

3. After knowing the pendency reason, you need to Inward the pending **document / Payment** though BOSG, post completion of pending document or payment Inward in Helios, your account will get unlocked after 2 HRS.

5. What if I get 'Your Credit limit has crossed the due Date and Amount is not replenished yet' message?'

Answer:

A. If you are getting above error message, Please follow the below steps –

1. Please click on 'Outstanding Policies' on Home Page.
2. Please check Outstanding Report and create Batch against pending policies for more than **5 day's** ageing.

3. If Batch ID is already created in PIE, but status is still showing as 'Submitted', then kindly inward the Batch in Helios.
4. If Batch is already Inwarded in Helios and status still showing as 'Submitted', kindly coordinate with Helios Support team.

To raise your request with Helios Team –
Please use below link.

http://servecentral

5. If Batch status is 'Submitted By Helios' in PIE, and amount is not replenished then send mail to PIE.SUPPORT@HDFCERGO.COM

6. I am a sales user. Can I create payment for Intermediary/Customer?'
Answer:
A. You can create payment for Imd/Customer. Create Payment for IMD –
   1. Please click on '**Create Payment**' option on Home Page.
   2. Select the IMD under your channel.
   3. Click on add payment.

B. Create Payment for Customer –
   1. Please click on '**Create Payment**' option on Home Page.
   2. Select the IMD under your channel.
   3. Enter Customer Name/Code and click on search icon.
   4. It will list all customer under selected IMD.
   5. Click on add payment

7. What if I get 'Validity date expired'message?
Answer:
C. If you are getting above error message, Please follow the below steps –

   1. Provide GC Code, PIE Login User ID to GC Support team asking them to extend validity of your Intermediary Code.
   2. To raise a ticket with GC support –
      - Internal users can raise a ticket through 'Manage Engine Service Desk' to do so please click on below URL –

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http://10.62.211.26:8000/

- External Users (outside HDFC ERGO domain) / dealers can send mail to below email id directly.

gcprod@hdfcergo.com

Please Note – Internal users / domain user (e.g. ...@hdfcergo.com) Please do not use above mail id for ticket logging.)

B. Post confirmation from GC team,you can check the same in PIE. If problem still persist post confirmation from GC team, please send mail to PIE.SUPPORT@HDFCERGO.COM along with confirmation mail and error screenshot.

8. I am a Banca (B2) user, howcan I get access of PIE application?
Answer:

1. To know your role in GC, Please login to GC and check your role in top right. This role should be either SALES or INTERMEDIARY for your valid access in PIE.
2. If your role is 'SALES_ENQUERY', Please raise a ticket with GC team to change it to 'SALES'.

3. To raise a ticket with GC support –

- Internal users can raise a ticket through 'Manage Engine Service Desk' to do so please click on below URL –

http://10.62.211.26:8000/

- External users (outside HDFC ERGO domain) / dealers can send mail to below email id directly.

gcprod@hdfcergo.com

Please Note – Internal users/ domain user (e.g. ...@hdfcergo.com) Please do not use above mail id for ticket logging.)

3. After changing role in GC, User needs to check all Intermediaries are mapped with Correct PSM Code against which User ID has been created. In case of mismatch in User ID's PSM Code & Intermediary's PSM Code, you need to contact ChannelSetup@hdfcergo.com to correct the same.
4. Post confirming above Two Points, you need to send mail to PIE.SUPPORT@HDFCERGO.COM to get access to PIE application.
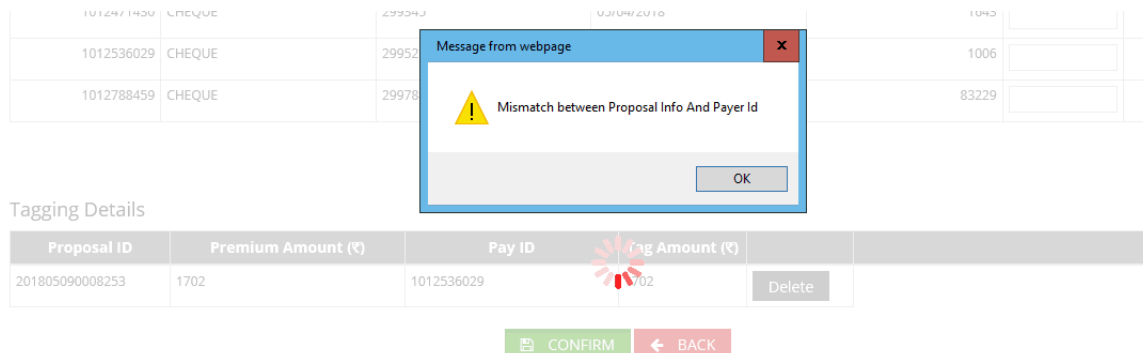
9. Who can Login into PIE application?
Answer:
A. User's belongs to 'Intermediary' Role in GC and having valid User id in GC can login into PIE application with same Login Credentials as that of GC.

B. Also, users with 'Sales' Role in GCcan also get access of PIE application. For this, User id should be created in GC against correct Primary Sales Manager's (PSM) Code.

10. What do I do if I get 'Mismatch between Proposal Info and Payer ID'?

Answer:
1. Please check Proposal Intermediary Code & Payment ID Intermediary codes (Payer's ID) in GC. In case of mismatch in Intermediary code you will not be able to tag such proposal through PIE.
2. If both, Proposal Intermediary Code & PID payer ID are same and problem still persist, you can send mail to PIE.SUPPORT@HDFCERGO.COM along with Proposal Number, Payment ID, Intermediary Code, error screenshot and one more screenshot showing both Proposal & PID are belongs to same Intermediary.

11. How can I add New Financier / Bank or Vehicle details or any Master details in PIE?
Answer:
1. If you want to add any Master record in PIE application, Please confirm that same record is already available / updated on GC. If record is not available in GC, you need to contact Priceupdate@hdfcergo.com to get it updated.
2. Once, record will be updated in GC, same will reflect in PIE on next day.

12. How to update Payment Mode in PIE?
Answer:
1. If you are not getting desired Payment mode on Payment Page, you need to send mail to PaymentId@hdfcergo.com with below mentioned details –
   i. User ID
   ii. GC IMD Code
   iii. Business Location

   Once confirmed from Payment Id team this will be available in PIE.

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13. I cannot see my intermediary while creating policy, what should I do?
Answer:
1. You need to check and confirm that all Intermediaries are correctly mapped with same PSM Code against which User id is created.
2. In case of any mismatch between PSM Code of User ID and PSM Code of Intermediary, Please coordinate with Channel setup team (ChannelSetup@hdfcergo.com) and get the mapping done against correct PSM Code.
3. Post confirming above Two Points, if you are not able to find intermediary then send mail to PIE.SUPPORT@HDFCERGO.COM.

14. I clicked on Proposal link on dashboard page but I am getting 'Access Denied' message.
Answer:
1. Above problem occurs, if your existing payment is not acknowledged and still you try to tag same proposal with another payment mode.
2. In this scenario, you need to send mail to PIE.SUPPORT@HDFCERGO.COM along with PIE User ID, Proposal Number and error screenshot.

15. What if I get 'GC Authentication failed' message?
Answer:
1. Above problem occurs, when user password is incorrect/ has expired.
2. In case of above error, you need to reset your Password in PIE by Forgot Password or Reset Password options and try again after successful change of Password activity.
3. If problem still persist after Forgot/Reset Password activity, you need login into GC application to know the reason of failure, if you are able to login in GC application, you will be able to login in PIE too.
4. If problem still persist, Kindly contact PIE.SUPPORT@HDFCERGO.COM.

16. What If I get 'Invalid User' message?
Answer:
1. This problem occurs if User Role is not valid for accessing PIE application.
2. Only 'Intermediary' & 'Sales' users can be allowed to generate policies in PIE. Hence, you need to login with correct user id having valid User role in GC.

17. What If I get 'Unable to retrieve proposal pdf bytes from clickpss service' message?
Answer:
1. This problem occurs when there is unexpected delay in downloading Policy PDF due to poor internet connectivity or any network problems.
2. If you will get above error message, you need to send mail to PIE.SUPPORT@HDFCERGO.COM along with Policy Number, PIE User ID and error screenshot.

18. What If I get 'Invalid BreakIn ID - Error in BreakIn Id verification Service' message.
   Answer:
   1. This problem occurs whenincorrect valueis entered in either of below fields –
      - i.   Incorrect Break ID Number
      - ii. Registration Number Mismatch
      - iii. Registration Date
      - iv. Inspection Date

   2. You need to check Break-in status as it should be 'Recommended'.
   3. Post verification of all above details, if problem still persist, Kindly send mail to Support.breakin@hdfcergo.com / Breakin.Support@hdfcergo.com by mentioning **Break ID.**

19. What if you get 'Invalid Proposal No' message?
   Answer:
   1. This problem occurs whenProposal isexpired / is inactivein GC. To know the status of proposal, you need to contact GC Support team.

20. I am getting 'Conversion from string "" to type 'Date' is not valid' while tagging my payment, what should I do?
   Answer:
   1. This problem occurs when Proposal has expired / is inactive in GC.
   2. You need to send request to GC Support team for activation of proposal Number.
   3. Post confirmation from GC Support team, you will be able to proceed further for Policy issuance in PIE.

21. What If I get 'Error in Proposal Creation.Given Reference No is not valid for this current operation' message?
   Answer:
   1. This problem occurs when Proposal has expired / is inactive in GC. To know the status of proposal, you need to contact GC Support team.

22. What If I get 'Payment no. already exists!' message?
   Answer:
   1. This problem occurs when you try to enter similar payment detail (like cheque Number, cheque date, Bank Name & cheque Amount) is already available in PIE.
   2. In this case, you need to verify existing Payment details and try to use the same.
   3. You can also proceed further by submitting new payment details.
   4. If problem still persist, Please send mail to PIE.SUPPORT@HDFCERGO.COM along with PIE User ID, above payment details & Error screenshot.

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23. What If I get 'Error in Proposal Creation.Proposal date should be between Channel start date and end date' message?

Answer:

pie.hdfcergo.com says

Error In Proposal Creation. Excep 148 At. and - 201808010029174 - ORA-20202: ERROR --ORA-20201: Error in Validating channel and Intermediary details:0,Errormessage:Proposal date should be between Channel start date and end dateExcep proc_after_uw_pop_ac_data. Message - ORA-20202: ERROR --ORA-20202: ERROR --ORA-01403: no data found .Audit Log Transaction ID - 100000102847217.

OK

1. This problem occurs when deal has expired for selected IMD.
2. Please send mail to ChannelSetup@hdfcergo.com by mentioning
   - your GC Intermediary Code,
   - Name of Product to map particular channel / product against your GC Intermediary Code asking to extend deal date.

24. I am trying to create Quote/Proposal but getting error as 'An error has occurred while consuming this service. Please contact your administrator for more information. Error ID:' what should I do?

Answer:

1. This problem occurs when there is a delay in response due to poor Internet connection, or any network problem.
2. Kindly log out and retry.
3. If issue persists, then you need to send mail to PIE.SUPPORT@HDFCERGO.COM along with PIE User ID and error screenshot.

25. I am trying to save Proposal but getting error as 'Error In Proposal Creation. Excep 148 At. and - 20xxxxxxxxxxxx - ORA-20202: ERROR --ORA-20203: Please enter GSTIN;GSTIN to SEZ unit holder is compulsory as per GST Law.'

Answer:

1. This problem occurs when GSTN field is blank on proposal page.
2. You need to check and verify the correct details on Proposal page.
3. Please problem still persist, send mail to PIE.SUPPORT@HDFCERGO.COM along with PIE User ID and error screenshot.

26. What if I get 'Payment ID should be CONFIRMED and having minimum balance of Rs. 100 Error in Deposit Transfer procedure' message?

Answer:

1. This problem occurs when Payment ID is not in confirmed state and user tries to tag policy against such Payment id.
2. In this case, user need to do the needful in order to get PID status in confirmed state in GC.

3. You can also coordinate with Payment ID team, to know the status of Payment id.
4. Once PID is confirmed, user will be able to issue policies in PIE

27. What if I get 'BreakIn Generation Error - Breakinxxxxxxx within 8 days inspection validity' message?

Answer:

1. This problem occurs when there is delay in completing Inspection process.
2. Validity of Break-in ID is 8 days once created, hence, your break-in process should be complete within 8 days.
3. To solve this, you need to create new Break-in id in respective system.

28. What if I get error like 'Error in Proposal Creation. Error in User Entry – Referral Code is Blank. Please enter the referral code'?

Answer:

1. This message come's when your Intermediary is belongs to 'RETAIL DIRECT' or 'DIRECT HEALTH GROUP' vertical, hence system will not allow you to proceed further without Referral code.
2. In this case, you will not be able to proceed further through PIE.
3. Hence, you would require the Intermediary which is not belongs to above vertical to book your business through PIE.

29. What if I get 'Error in CD Tagging: Error while calling CD Tagging procedure. Exception: Not a Valid Proposal for Tagging –20xxxxxxxxxxxxxz' message?

Answer:

1. This problem occurs whenproposal in Cancelled or made Inactive in GC.
2. Hence, you need to raise this request with GC Support team by mentioning your proposal number.

30. What if I get 'Error in CD Tagging: Error while calling CD Tagging procedure. Exception: Not enough balance For Proposal no…' message?

Answer:

1. This problem occurs when there is no balance left in your CD account.
2. Please coordinate with Payment Id team (PaymentId@hdfcergo.com) and get the balance updated against the intermediary code.

31. How to get 'Additional Premium' field in PIE? Or How to enter Cover Note Premium in PIE?

Answer:

1. We have made provision of 'Additional Premium' field, where PIE user can enter the Cover Note premium in this field. Later, system will auto adjust the loading / discount in proposal to match the premium amount you have entered in 'Additional Premium' field in PIE.
2. To avail his facility, your Intermediary should belongto Flexi in GC and for that you need with contact Motor UW to set your Intermediary codeunder Flexi Category.

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32. I am trying to calculate premium but keep getting message as 'Please enter valid Additional Premium Amount', What should I do?

Answer:

1. You will get this message, when your Intermediary belongs to Flexi category, and field 'Additional Premium' is blank at the time of calculating Premium. Hence, to solve this you need to enter the Premium amount in 'Additional Premium' field to proceed further.

33. What is 'VB64 Validation'?

Answer:

VB 64 validation comes when you Payment date is beyond your Policy start date, so make sure Payment date is on or before of Policy Start Date.

34. What if I get 'BreakIn Generation Error - Vehicle already pending for inspection' message?

Answer:

1. This problem occurs whenever your vehicle is not inspected and still you are trying to proceed ahead.
2. To solve this, you need to complete the Inspection process.
3. To know the breakin status, you can send mail to Support.breakin@hdfcergo.com / Breakin.Support@hdfcergo.com

35. What if I get 'Please Select The Type_ Of_Calculation For Short Period proposal' message?

Answer:

1. To solve this problem, you need to re-verify the Risk Start Date & Risk End date. Also, in case of Rollover or Renewal case, you need to check Previous Policy End Date.
2. If problem still persist, post verifying correctness of all above fields, please send mail to PIE.SUPPORT@HDFCERGO.COM along with PIE User ID and error screenshot.

36. What to do if GC id gets locked?

Answer:

1. Check POS Outstanding Report (Available with AOSMs and in Sales Portal) for any inward pendency.
2. Whether any POS case has been inwarded as NON-POS:- Re-mapping will be required - Please contact Banking Ops. @ Banking.Finance@hdfcergo.com
3. Payment already available in GC but fetch option not used in Helios. :- Re-mapping will be required - Please contact Banking Ops.
4. POS id gets locked due to pendency'sof any payments / policies irrespective of being POS or NON-POS for that intermediary id.
5. After corrections/inward/payment creation, it requires 2 hours for

systems (GC and Helios) to get synched and unlock the ids.

6. Please contact Helios Support with following details:-

   a. POS Outsanding Report - Checked - Y/N
   b. List of Policies & Payments shown as pending in POSOutstanding Report and already inwarded.
   c. Re-mapping scenario checked - Y/N

   Please use below link to raise your request with Helios Team –
   http://servecentral

37. Can I Cancel Proposal generated through PIE application?
Answer:

1. In PIE, you will not be able to cancel any proposal. For Cancellation, you need to coordinate with GC team or our Cancellation team.

38. Can I do endorsement through PIE application?
Answer:

1. In the current version of PIE, you will not be able to do any Endorsement. You will need to coordinate with our Endorsement team along with Policy Number and Endorsement details.

39. Can I make change to Proposal created on PIE application?
Answer:

1. Once proposal is successfully generate in PIE, you will not be allowed to make any changes in same.
2. You may re-create another proposal in case of any change required in existing proposal.

40. Can I delete the Batch ID created in PIE?
Answer:

1. You can Delete the Batch id only if your Batch id is in Drafted state.(i.e. you have Saved the Batch but not yet Submitted in PIE.
2. Once you Submit the Batch id in PIE. You will not be able to Delete this Batch.

41. Can I edit the payment details in Batch which is already created?
Answer:

1. Yes, you can edit the Payment details like Instrument Number, Instrument Date & Bank Name while your Batch id is in Drafted or Submitted state. Once batch status changes to SBH (Submitted By Helios), you will not be allowed to make any changes in Batch id.

42.How to solve 'Payment deducted but Policy Not generated' problem?
   Answer:
   1. In this type of Problem, Please send mail to PIE.SUPPORT@HDFCERGO.COM along with Proposal Number, Mode of Payment, PIE User ID and error screenshot.

43.What to do if Customer does not receives the Consent Letter?
   Answer:
   1. You need to recheck Customer email id is correctly inserted in PIE.
   2. If email id is correct, you can resend consent letter from PIE.
   3. Please ask customer to check email in his SPAM and Promotions folders too.
   2. If still customer not received the Consent letter, Please send mail to PIE.SUPPORT@HDFCERGO.COM along with Proposal Number, Mode of Payment, PIE User ID and error screenshot.

44.How "Consent by OTP" functionality works?
   Answer:
   1. You need to generate the proposal in PIE.
   2. On Check-Out page, click on "Send Consent By OTP" Button.

   3. Call Customer and take OTP from Customer which is sent on his mobile/Email.Please enter OTP &click on Validate Button.

   4. Once OTP is entered, Customer consent will get accepted.

45. What are the different PIE/Helios status inNSTP flow and how to determine current Proposal Status?

Answer:

1. When agent creates the proposal on PIE and declares the PED as informed by the customer, below is the status set

duct de⇕	Product Description⇕	Premium Amount (₹) ⇕	Service Tax/GST (₹)⇕	Total Premium (₹)⇕	Policy Start Date ⇕	Policy End Date⇕	Expiry Date⇕	Current Status⇕	Break No⇕
2864	Medisure Classic Individual Policy	4481	807	5288	23/08/2018	22/08/2019	01/12/2018	PPC/PED APPROVAL PENDING	
2864	Medisure Classic Individual Policy	4481	807	5288	23/08/2018	22/08/2019	01/12/2018	PROPOSAL GENERATED	
2825	HEALTH SURAKSHA FAMILY POLICY	7452	1341	8793	23/08/2018	22/08/2019	01/12/2018	PAYMENT CREATED IN GC	

2. When customer makes the payment of premium intimated at the time of proposal

	Premium Amount (₹) ⇕	Service Tax/GST (₹)⇕	Total Premium (₹)⇕	Policy Start Date ⇕	Policy End Date⇕	Expiry Date⇕	Current Status⇕	Break Ref No⇕	HCS Status⇕	Payment Id⇕
	4481	807	5288	23/08/2018	22/08/2019	01/12/2018	PAYMENT CREATED IN GC			1004629151
	4481	807	5288	23/08/2018	22/08/2019	01/12/2018	PROPOSAL GENERATED			
	7452	1341	8793	23/08/2018	22/08/2019	01/12/2018	PAYMENT CREATED IN GC			1004629138
	7221	1300	8521	23/08/2018	22/08/2019	01/12/2018	PPC/PED APPROVAL PENDING			1004629141

3. DC allocation completed; Pending for approval at underwriter - moves to HCS bucket (status update in HCS Status column as per the decision given by the UW).Possible values marked on right with arrow.

	Premium Amount (₹) ⇕	Service Tax/GST (₹)⇕	Total Premium (₹)⇕	Policy Start Date ⇕	Policy End Date⇕	Expiry Date⇕	Current Status⇕	Break Ref No⇕	HCS Status⇕	Payment Id⇕
	4481	807	5288	23/08/2018	22/08/2019	01/12/2018	PPC/PED APPROVAL PENDING FROM UNDERWRITER			1004629151
	4481	807	5288	23/08/2018	22/08/2019	01/12/2018	PROPOSAL GENERATED			
	7452	1341	8793	23/08/2018	22/08/2019	01/12/2018	PAYMENT CREATED IN GC			1004629138

Possible values:
- Proposal Accepted With Risk
- Proposal Pending Payment From PIE
- Proposal Additional Information Updated
- Proposal PPC Progress
- Proposal Completed Without Scaning
- Proposal Duplicate Lead
- Proposal Completed Scaning
- Proposal Case Assigned to UW
- Proposal NO MATRIX DEFINED
- PPC in Progress
- Proposal Park for UW Review
- Proposal AddInfo Required
- PROPOSAL_VERIFICATION_PENDING_NON_MEDICO
- Proposal Additional Information Required
- Proposal failed scanning from I3
- Proposal Accepted
- Proposal Rejected
- Proposal PEN UW Decision

4. When underwriter accepts proposal with Loading

	Premium Amount (₹) ⇕	Service Tax/GST (₹)⇕	Total Premium (₹)⇕	Policy Start Date ⇕	Policy End Date⇕	Expiry Date⇕	Current Status⇕	Break Ref No⇕	HCS Status⇕	Payment Id⇕
	4929	887	5816	23/08/2018	22/08/2019	01/12/2018	PAYMENT CREATED IN GC REVISED			1004629151
	4481	807	5288	23/08/2018	22/08/2019	01/12/2018	PROPOSAL GENERATED			
	7452	1341	8793	23/08/2018	22/08/2019	01/12/2018	PAYMENT CREATED IN GC			1004629138

5. After loading customer goes for acceptance of revised premium

⊛ View Detail ⊞ Audit Trail ⊘ Clone ⇄ Convert To Proposal ⊞ Quote Compare ✉ Send Quote Email ⊡ Download Quote PDF ⊡ Download Proposal PDF ♣ Process ECN Policy

	Premium Amount (₹) ⇕	Service Tax/GST (₹)⇕	Total Premium (₹)⇕	Policy Start Date ⇕	Policy End Date⇕	Expiry Date⇕	Current Status⇕	Break Ref No⇕	HCS Status⇕	Payment Id⇕
	4929	887	5816	23/08/2018	22/08/2019	01/12/2018	PAYMENT CREATED IN GC REVISED CONSENT PENDDING			1004629151
	4481	807	5288	23/08/2018	22/08/2019	01/12/2018	PROPOSAL GENERATED			
	7452	1341	8793	23/08/2018	22/08/2019	01/12/2018	PAYMENT CREATED IN GC			1004629138

6. When Customer accepts the revised premium but not made payment yet

⊛ View Detail ⊞ Audit Trail ⊘ Clone ⇄ Convert To Proposal ⊞ Quote Compare ✉ Send Quote Email ⊡ Download Quote PDF ⊡ Download Proposal PDF ♣ Process ECN Policy

	Premium Amount (₹) ⇕	Service Tax/GST (₹)⇕	Total Premium (₹)⇕	Policy Start Date ⇕	Policy End Date⇕	Expiry Date⇕	Current Status⇕	Break Ref No⇕	HCS Status⇕	Payment Id⇕
	4929	887	5816	23/08/2018	22/08/2019	01/12/2018	PAYMENT CREATED IN GC REVISED CONSENT ACCEPTED			1004629151
	4481	807	5288	23/08/2018	22/08/2019	01/12/2018	PROPOSAL GENERATED			
	7452	1341	8793	23/08/2018	22/08/2019	01/12/2018	PAYMENT CREATED IN GC			1004629138

7. Post payment, this will visible only if the payment is done online but confirmation is pending from bank (usually gets resolved in 1-2 hrs), else policy will be created.

⊛ View Detail ⊞ Audit Trail ⊘ Clone ⇄ Convert To Proposal ⊞ Quote Compare ✉ Send Quote Email ⊡ Download Quote PDF ⊡ Download Proposal PDF ♣ Process ECN Policy

	Premium Amount (₹) ⇕	Service Tax/GST (₹)⇕	Total Premium (₹)⇕	Policy Start Date ⇕	Policy End Date⇕	Expiry Date⇕	Current Status⇕	Break Ref No⇕	HCS Status⇕	Payment Id⇕
	4929	887	5816	23/08/2018	22/08/2019	01/12/2018	Awaiting Payment Creation in GC			1004629151
	4481	807	5288	23/08/2018	22/08/2019	01/12/2018	PROPOSAL GENERATED			
	7452	1341	8793	23/08/2018	22/08/2019	01/12/2018	PAYMENT CREATED IN GC			1004629138

46. What to do if Customer has given Single cheque for multiple Policies

Answer:

You can create Payment through either of below modes -

A. Customer Payment

B. Intermediary Payment

A. Customer Payment

8. This Payment Mode can be used, when more than 1 policies need to issue for same Customer.
9. Create the first proposal as normal PIE flow.
10. On Payment page, make sure your Payer Type is selected as '**Customer**'
    Now select the required payment mode and enter the 'Total Amount' in '**Transaction Amount**' field on Payment page.
    Total amount should be inclusive of all Proposals you need to issue against same Customer.

    (e.g. Customer wants to opt for Health Suraksha (HSP) and Medisure Super Top Up (MST) policies, having premium 5000/- & 3000/- respectively, and given a single cheque of 8000/-, then you need to enter **Proposal Amount** as 8000/- and proceed further.
11. Click on '**Save**' button and complete the first transaction.
3. Now, Create 2nd Proposal with Search Customer functionality (Make sure customer id is same as 1st Proposal)
4. On Payment Screen use '**Skip**'option, System will display available PID's with balance amount(Please refer to below sample screenshot's)
5. Use the Available Balance from Payment ID and Tag your Second Proposal to generate Policy. Likewise, you follow the same for rest of customer proposals.

Screen 1

Screen 2

Screen 3

B. Intermediary Payment

1. Select '**Create Payment**' Option available on Homepage.
2. Then Click on '**Add Payment**'Button
3. Select Payment mode and enter payment details accordingly. System will generate GC Payment id against each of your transaction.
4. After Successful creation of Payment id's, start Creating your Proposal as per normal process in PIE
5. On Payment page,use **Skip** option and you will find the list of all Payment ids's created against your Intermediary along with Available Balance.
6. Now, select the Proposal & User the Amount from payment id's to issue the Policy.

47. How can I tag new payment Id if my old payment id gets cancelled in NSTP?
Answer:
1. Go to Payment screen
2. Click on Skip button
3. You can see old Payment.
4. Click on **Delete**.
5. Use new PID &Confirm, Policy will auto create.

| 1004624173 | 96512045 | | 04/06/2018 | | 589394 | | Use |

Tagging Details

Proposal ID	Premium Amount (₹)	Pay ID	Tag Amount (₹)	Action
201807040000328	1791	1004624173	1791	Delete

CONFIRM   ← BACK

48. What to do if Customer given multiple cheque for singlePolicy?
Answer:
1. You need to Create Proposal, and note down the Customer ID/Name
2. Create multiple payment id for the same Customer using "Create Payment" screen. Payer type to be selected as Customer.
3. In payment screen, use **Skip** option and then you can use multiple PID and tag policy.
4. Instead of creating payment under customer, You can also create multiple cheque under logged in IMD and use them in **Skip** option.

49. What if Payment is done but policy is not created?
Answer:
1. If the payment tagged with the proposal is in cancelled state then policy will not be issued, so kindly check status of payment before raising concern to pie team.
2. Policy will not create if your account is locked. So please check account lock status.
3. If date of payment is greater than policy start date, then policy will not be created.(vb 64 validation)
4. In case of NSTP, if there are two different payer's i.e one is Intermediary and other is customer, then also policy will not be created.

50. What if I get error like 'Error in Proposal Creation. Error in User Entry – Referral Code is Blank. Please enter the referral code'?
Answer:
1. This message come's when your Intermediary is belongs to 'RETAIL DIRECT' vertical, hence system will not allow you to proceed further without Referral code.
2. In this case, you will not be able to proceed further through PIE..

3. Hence, you would require the Intermediary which is not belongs to above vertical to book your business through PIE.

51. What to doincase user experiencesany unexpected errornot listed in this document?

Answer:

1. Please send mail to PIE.SUPPORT@HDFCERGO.COM by mentioning your User ID, Quote ID (if available), Proposal ID (if available)& Error Screenshot.
2. You need to Make Sure that, your ticket has been correctly assigned to PIE Support Desk by typing above email id manually.
3. You will receive an acknowledgement response within 2 HRS.
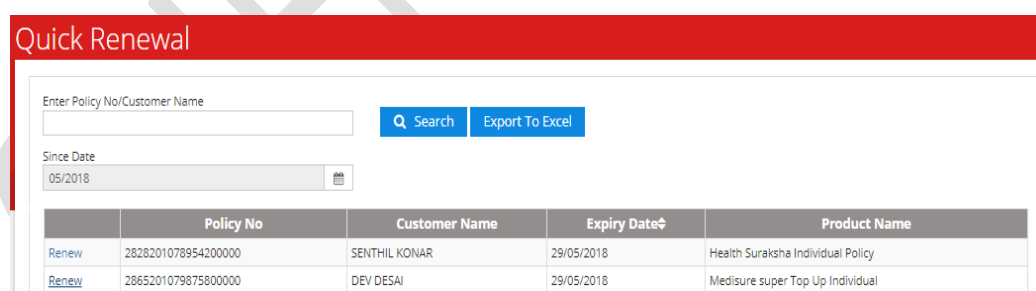
52. How does functionality of Quick Renewal works?

Answer:

On Home page, You can find Quick Health Renewal option.
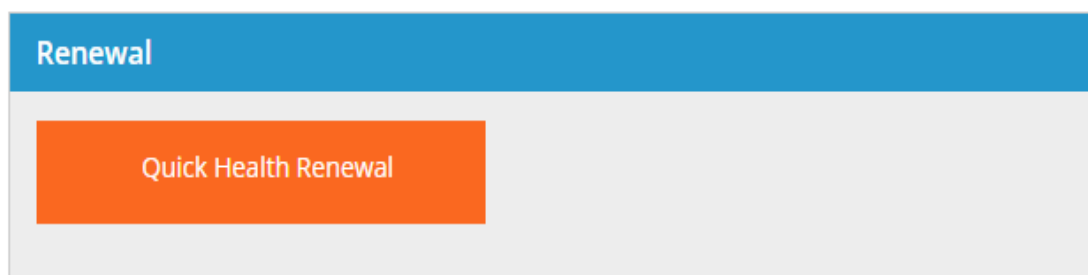
a. Go to Quick Renewal, Select your policy to Renew and Click "Renew". You can also search by Policy No/Customer Name

b. On click of "Renew" it will open policy details page, verify it.

Quick Renewal

Quote Number	Customer Name	Previous Policy Number
HSR0518000017842	SENTHIL KONAR	2828201078954200000
Net Premium	**GST**	**Total Premium**
4968	894	5862

Proceed to generate policy | ← Back

c. Post verification, Click on "Proceed to generate Policy"

Quick Renewal

✔ Success

Proposal No - 201805180000241 is created successfully.

Return To Dashboard | Proceed to Checkout

d. Once Proposal is generated, Click on "Proceed to Checkout"

53. How Voice Enabled Data entry works ?
Answer:

a. On/Off button has been provided with Mic 🎤 symbol on Top Right corner of home screen which can be used to start Speech to text feature.
b. Once its turned on, system will automatically recognize fields and display mic symbol for all applicable fields
c. On click of mic, text field would automatically display message as "Speak Now" and start recognizing your voice till you stop speaking and convert it into text. (Sample below)
d. In case if any delay in speaking, system would automatically stop recognizing after 3 sec's. You may restart speech to text by clicking mic button for respective fields.

Manufacturer Name ^

| Speak now | 🎤 |

Compatibility
Laptops / Desktops / Mobiles / Tables having Mic enabled (Except Apple products)
Browser - Google Chrome.

54. Marine: How much backdating is allowed in MSV PIE?
Answer:

We do not allow backdating in MSV PIE. You can future date the proposal/policy for 7 days.

55. Marine: What are the commodities available on MSV PIE?
Answer:

Commodities available on MSV PIE are –

- Cotton, Man-Made Fiber, Silk, Synthetic Fiber, Wool, Yarn
- Rice, Grain, Pulses, Dal
- Cocoa Products, Confectionary (Biscuits, Candies), Instant Coffee, Tea, Seasoning Spice, Fruit Juices
- Non-Refrigerated Pharma Products
- Ore - Copper, Iron, Manganese; Concentrate - Copper, Zinc, Lead (Non-bulk)
- Office Automation, Electronic calculators, Computer systems, Electrical Equipment, White Goods
- Kitchen Appliances, Cosmetic, Bags, Dolls, Toys and other similar products
- Metal Auto Parts
- Containers
- Spare Parts – Metal
- New Machinery
- Readymade Garments
- Non Hazardous Chemical
- Fabrics
- PVC Sheets/granules
- Stainless Steel & items made of steel
- Shoes other Leather products

Any other commodity will be mapped on a case to case basis by the Central

56. Marine: Can I apply for loading or discounting in my proposal?

Answer:

Yes, loading is allowed. Discounting is not allowed as the minimum Premium is INR 500+ GST and rate is as low as 0.04% for both Inland and EXIM transits.

57. Marine: In case I need to issue policy with a customised Terms and condition for a specific Intermediary, what should I do?

Answer:

In case you want to issue a MSV with customised Terms and Conditions which is beyond the system capacity, you may refer the case to your Sales Manager and the Policy will be generated/ processed through an Underwriter.

58. Marine: Can I see my balance Sum Insured in my Marine Open/ Sales Turover policy?
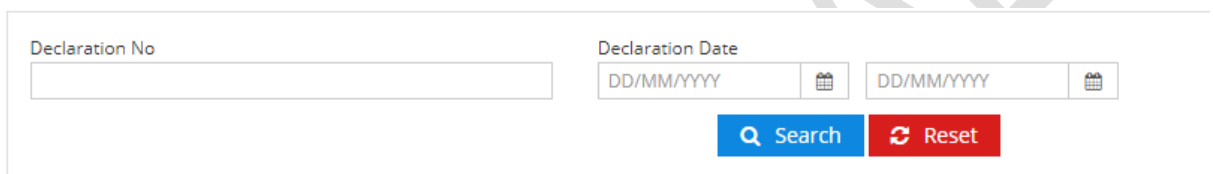
Answer:

Yes, you can see the **Total Sum Insured** and **Balance Sum Insured** on the Policy page

59. Marine: What are the options available on the declaration page?
Answer:

Options available on the declaration page are **download certificate in PDF** form- either submitted or drafted certificate. **View certificate** in case the certificate/ declaration has been submitted. **Edit** in case the certificate/ declaration has been drafted and Clone certificate to generate a similar information certificate at a click.

You can also search the declaration using the **declaration num**ber or **declaration date**.

 Download Certificate View Declaration Edit Declaration Clone

60. Marine: Can I edit my declaration?
Answer:

You can edit the information as many times as you want by generating the draft version. As soon as you have finalized a certificate you will not be allowed to change any information in that.

Please note: In case you need to do some changes in the finalized certificate you may contact your Sales manager.

61. Marine: Can I send the certificate directly on my email ID?
Answer:

Yes, you may send the certificate on any number of email IDs separated by commas.

62. Marine: Will my Balance be deducted if I save a declaration in Draft mode?
Answer:

No, Sum Insured will only be deducted in case the declaration / certificate is finalized.

63. Marine: Whom to contact in case of cancellation and refund of certificates?
Answer:

You may contact your Sales Manager.

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64. Marine: Whom to contact in case of enhancement in the Sum Insured?
Answer:

You should enhance/ increase your Sum Insured when the Balance Sum Insured gets reduced to 25% of the Sum Insured for the uninterrupted certificate issuance. For enhancement in the Sum Insured, you may contact your Sales Manager.

65. Marine: Where can I see my statement of account?
Answer:

You can view your Statement of Account or Utilization report under the Open Policy by clicking on the Download Utilization Report Excel on the policy page.

66. What are the modes of payment available?
Answer:

Cheque, Cash, DD, IVR, Funds Transfer, RTGS, NEFT, Credit Limit (for agents only) and Payment gateway is also there. You can either make the payment or send the payment link to the customer.

67. What is the Dashboard link on the home page used for?
Answer:

You can search the Quote using the Quote number or Quote Creation Date. You can also search your policy using the Policy number, customer name, status or Product name etc.

68. Can I edit my proposal?
Answer:

You can edit the quote/ proposal before making the payment. Once the payment is made and the policy is generated no changes are allowed. You can edit/ download the Quote PDF at the checkout page.

69. Can I send the policy directly to the client?
Answer:

Yes, you may send the policy on any number of email IDs separated by commas.

70. What are the documents required to be submitted to HDFC ERGO office?
Answer:

You have to submit the policy copy and cheque / DD in case the payment is made through these modes within 5 days of policy issuance through PIE. In case the payment is made online / NEFT, only policy copy is required to be submitted. If the documents are not submitted within 5 days, the ID gets locked automatically by the system.

71. PIE is running slow, what should I do?PIE is running slow, what should I do?
Answer:

Slowness is majorly due to slow network on your machine/mobile, Please check the internet speed via website https://fast.com/en/.
If the speed on your network is above 1 mbps and still you are facing slowness in PIE, please send mail to PIE.SUPPORT@HDFCERGO.COMwith screen shot of what activity within PIE is slow

72. What is Two Factor Authentication (2FA) in PIE?
Answer :

To increase customer data security in PIE, OTP verification is introduced as part of the two-factor authentication during LOGIN.

Customer needs to update the User registration page with your email ID & mobile number as a onetime activity followed by the OTP login. The OTP login session will be valid for a 2 hrs threshold limit.

If you get logged off, you can login multiple times within 2 hrs of the first login without updating OTP. After the 2 hr time limit you will need to login once again by submitting the OTP received on email id and mobile number.

Note:

1. Two factor Authentication steps are applicable for registered users only.
2. In case of new user registration/ password reset or any issue write to Partner Support team
3. This is applicable for all Advisors𝜈 & Partners
4. Click on forgot password on Sign in to PIE page if you have not logged in to PIE in 30 days

73. What are the steps for Two Factor Authentication (2FA) in PIE?
Answer:

Steps to follow :

1. Go to pie.hdfcergo.com
2. Sign in with user ID & password

Sign in to Policy Issuance Engine

All fields are mandatory.

Username

INDOSTAR-3

Password

•••••••

Login

Forgot Password? | FAQ | New User Activation | Premium Calculator

3. Update email ID and mobile number (as a onetime activity)

User Registration

All fields are mandatory.

Username*

INDOSTAR-3

Email id*

aaxxxx@hdfcergo.com

Mobile No.*

97xxxx06

Submit   Cancel

4. Validate with OTP (valid for 2 mins) and Click Verify and Proceed

Enter OTP here

We have sent you a One Time Password on registered email id: aaxxxx@hdfcergo.com and mobile 97xxxx06

| 1 | 5 | 1 | 3 | 8 | 2 |

Time Remaining 103 Seconds

Didn't get OTP? Resend OTP

Verify & Proceed   Cancel

74. How to update Email ID/ Contact number registered in 2FA?
Answer :

Steps to follow :

1. Sign in with user ID & password

Sign in to Policy Issuance Engine

All fields are mandatory.

Username

INDOSTAR-3   ✕

Password

•••••••   ✕

Login

Forgot Password? | FAQ | New User Activation | Premium Calculator

2. Enter OTP, received on contact no. /email updated during previous login. Click on **reset registration** details tab in case of change in email ID/contact number

Enter OTP here

We have sent you a One Time Password on registered email id: aaxxxx@hdfcergo.com and mobile 97xxxx06

5	9	1	5	2	9

Time Remaining 103 Seconds
Didn't get OTP? Resend OTP

Verify & Proceed   Cancel   Reset Registration Details

3. Update new email ID /contact number and submit details in case of change

75. What incase User experience unexpected error and resolution not received in 2 Hrs.

Answer:

Ticket number needs to be shared with SaumitraTatkarevia email or call.
Email: Saumitra.Tatkare@hdfcergo.com
Contact: 7666539862

76. What incase User experience unexpected error and resolution not received in 5 Hrs.

Answer:

Ticket number needs to be shared with Vishal A. via email or call.
Email: Vishal.Anand1@hdfcergo.com
Contact: 8291072928

77. What incase User experience unexpected error and resolution not received in 8 Hrs.

Answer:

Ticket number needs to be shared with Prashant Hire via email or call.
Email: Prashant.Hire@hdfcergo.com
Contact: 8879333770

78. What incase User experience unexpected error and resolution not received in 1 working day.

Answer:

Ticket number needs to be shared with Subramanian Iyer via email and along with complete details reverted by above mention matrix