

Policy Issuance Engine (PIE)

FAQs

(Version 1.0)

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CONFIDENTIAL

1. What are steps for User ID creation/Login Process?

Steps to follow

- Step 1.

User will received 3 Mails as below Subject

- Genisys - User Credentials
- Genisys - User Id Details
- User Activation Code

- Step 2.

Every mail will have below link, which needs to be open from internet explorer <https://hegc.hdfcergo.com/Configurator>

Below screen will open on click of link



- Step 3.

Click on link “Click Here To Login“

Below Screen will open on click of it.



- Step 4.

Enter User Id from Email subject “Genisys - User Id Details”

Enter Password from Email “Genisys - User Credentials”

Click on Login Button then system will show below screen



- Step 5.

Activate button will be displayed on screen



- Step 6.

On Click of Activate User Link system will display below screen.

Then enter the same credentials entered in previous screen.

Enter the activation code which is received from email “User Activation Code”

Then click Save Button

Activate User

| Activate User | |
|-------------------------|---|
| UserID * | <input type="text"/> |
| Password * | <input type="password"/> |
| Activation Code * | <input type="text"/> |
| | <input type="button" value="Save"/> <input type="button" value="Clear"/> <input type="button" value="Close"/> |
| * Fields are mandatory. | |

- Step 7.

On click of Save Button, system will display below screen to Change your password. Old Password for 1st time users will be from mail subjected "Genisys - User Credentials."

| Change Password | |
|-------------------------|--|
| Old Password * | <input type="password"/> |
| New Password * | <input type="password"/> |
| Confirm New Password * | <input type="password"/> |
| Validity Period * | <input type="text" value="90"/> |
| Select a Question * | <input type="text" value="Select"/> ▼ |
| Answer * | <input type="text"/> |
| | <input type="button" value="Save"/> <input type="button" value="Close"/> |
| * Fields are mandatory. | |

- Step 8.

On successful saving you will be able to login from below given link to GC. Post activation date, System will take one day to activate same in PIE. Note- To have access in PIE, user should be created in GC (ACTIVE) and should have appropriate role configured.

2. Whatif I cannot login / Unauthorized access in to PIE application?

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 -

1. Please click on 'Forgot Password?' Option provided on Login Page.
 2. Enter User name, Security Question and Answer.
 3. Click on Submit.
 4. You will receive a Password email on your registered email id.
 5. 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.COM by mentioning your User ID and error screenshot.

3. Who can Login into PIE application?

Answer:

- A. User's belongs to 'Intermediary' category 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' category can also get access of PIE application. For this, User id should be created against correct Primary Sales Manager's (PSM) Code.

4. 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 Advisors & Partners
4. Click on forgot password on Sign in to PIE page if you have not logged in to PIE in 30 days

5. 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

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*

Email id*

Mobile No.*

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](#)

6. 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

User Registration

All fields are mandatory.

Username*
INDOSTAR-3

Email id*
aaxxxx@hdfcergo.com

Mobile No.*
97xxxx06

Submit **Cancel**