FAQs

General Features :

1. What is CBX?
   It is corporate online banking platform for HDFC Bank customers.
2. Why do I need CBX?
   CBX is the latest product in terms of architectural offering the most convenient and easy to navigate platforms. It has several new features viz Omni technology, Contextual action, Self Auth, Multilevel authentication etc.
3. How / from where user can login in CBX?
   Go to HDFC Bank website (www.hdfcbank.com -> Wholesale -> New Internet Banking for Corporates)
4. What technology it uses for safety?
   It uses the second factor authentication for each user.
5. On which platform it is based on?
   It is based on Canvas technology, which means rapidly assemble omni channel solutions that dramatically enhance role-based efficiency.
6. Is mobile version available of CBX?
   Yes, it is available.
7. How many options will user get in mobile version?
   All necessary options will be available there in mobile version to process transaction.
8. How can I change my password, if forgot?
   Users need to click on "Forgot Password" and new password will be sent on registered mail ID. Using this as old password, user can change with new password.
9. How is the password constructed (Password policy)?
   Password will be alphanumeric without any special character.
10. Is it necessary to have special / numeric character in password?
    Yes, it is alphanumeric, but no special character allowed.
11. Is it possible to personalize the dashboard?
    Yes, user can personalise the dashboard as per his choice.
12. How many accounts can be added in a domain?
    There is no limitation of number of accounts that can be added in domain.
13. What is burger menu?
    Burger menu offers all set of options available for user.
14. How quick fire is useful feature for user?
    It is useful to initiate a transaction and to view / generate A/c statement.
15. What is use of quick links?
    User can initiate various activities / transactions using quick links. In other words, it's a shortcut to an activity for which user has.
16. Can I save my transactions as draft?
    Yes, it can be saved.
17. What are the 2nd level authentication options available?
    i.   Hard Token - OTP based Vasco token.
    ii. Soft Token - OTP comes to an app.
    iii. Digital certificate
18. Is alternate II level authentication available? If yes, can it be set as default?
    Yes, user can opt for multiple second factor authentication and use them alternatively. One of the factors may be set as default.
19. How long a login session will remain active for an idle user?
    15 minutes.
20. Will CBX support to upload monthly / quarterly stock statement for setting up drawing power?
    Yes, user can upload stock statement if he opts for the necessary entitlement at the time of on boarding to CBX.
21. Will user be able to check past transactions, processed on ENet (FC@C / MVC) on CBX.
    Yes, it is as per bank purging policy.
22. Will user be logged out from CBX if used Trade on Net or any other application apart from CBX.
    No, user will remain logged in till the session is live.

Account Services :

1. Can a user generate consolidated account statement for all A/c's mapped to his domain?
   Yes, it can be generated as consolidated account statement for multiple accounts.
2. How will user mark the stop payment?
   Path is Dashboard -> View -> Stop Cheque
3. Is it possible to mark multiple stop payment?
   Yes, user can mark A) Single - Only one cheque B) In series up to 100 C) Multiple - 6 in one go. Path is Dashboard -> View -> Stop Cheque
4. How can a user place request for cheque book?
   Path is Dashboard -> View -> Order Cheque Book
5. How many cheques book a user can request for in one go?
   At a time, user can request for only one cheque book.
6. What does it mean by "Manage Alias"?
   It is short name given to account title.
7. Will UTR # be part of narration in account statement for the transactions processed thru CBX?
   Yes, it will be there as narration in account statement.
8. What are maximum days / months for which user can generate A/c statement?
   User can generate six months statement, month wise. However latest 4,000 records will be shown at max.
9. Is it possible to enquire about cheque status issued to account?
   Yes, User can inquire about the cheque paid / unpaid for mapped to his account.
10. Can I register for GST using CBX portal?
    Yes, request can be placed using CBX portal.

Payments :

1. How can a user initiate the payment (Onscreen / Upload)?
   User can initiate payment through unified payment widget which has single/multiple & upload facility.
2. What is Business product and payment product?
   Business product means the purpose of payment i.e., Vendor / Salary / Tax / Reimbursement, where in payment product is transaction type i.e., NEFT / RTGS / Funds Transfer / IMPS / Cheque / DD.
3. What does it mean by contextual action?
   This is very useful function through which user can initiate all other types of transactions when he is in different page. Ex - Transaction can be initiated or A/c statement can be generated while viewing the A/c balance.
4. What is unified payment?
   Customer can initiate Single / Multiple / Bulk Upload and Statutory payments via same Widget.
5. Is it possible to make statutory payments via CBX?
   Yes.
6. Can a user make multiple transfer?
   Yes, User can make multiple transfer and 40 transactions can be processed in one go.
7. Is it possible to process a future dated transaction? If yes, what is the date range?
   Yes, User can make future dated transaction.
8. Is it possible to save beneficiary list to whom frequent payments are made?
   Yes, User can save beneficiary list and can take printout of same, if required.
9. What does it mean by template and how it is beneficial for user?
   When the transaction is of repetitive in nature. It can be saved with necessary particulars &can be invoked as and when needed. In such cases, user need not to capture all details further.
10. How many templates can a user save?
    It can be unlimited.
11. What size of file (to be uploaded) CBX supports?
    It is of 2 MB.
12. What all type of file format CBX supports?
    Any type of file format can be configured in CBX.
13. How expiry date is better than grace period?
    It is computed based on transaction initiation date.
14. What is Park and Unpark functions?
    If user wants to hold any transaction in his queue, it can be parked for a while.
15. Is it possible to restrict payment rights user wise / role based?
    Yes, it can be defined as per customer request. What is grid function & how it is helpful for user?
    It is a function through which user can design his viewing experience as per his own preference.
16. Is it possible to authorise a self-transaction?
    Yes, if customer has obtained the self-authorise facility.

Beneficiaries :

1. How many accounts can be added in single bene code?
   3 A/c's for each beneficiary for A2A / eCMS & 3 A/c's for each beneficiary for RTGS / NEFT / IMPS
2. How many beneficiaries can a user add?
   There is no restriction on number of beneficiaries that can be added on domain.
3. Can a beneficiary be restricted with day / transaction limit?
   Yes, it is possible.
4. Can the beneficiary daily / transaction limit be maintained by the user from their end.
   Yes.
5. How many beneficiaries can a user add?
   There is no restriction on number of beneficiaries that can be added on domain.
6. How many users (Levels of authorisation) can be made?
   At a time, 50 user levels can be accommodated.
7. It is possible to authorise all pending transactions in one go.
   Yes, user can authorise all pending transaction by selecting all in one go.
8. Will CBX support all types of virtual account for payment?
   Yes, it supports all virtual / eCMS accounts.
9. Will user get any alert for the transactions processed at inputter / authoriser level?
   Yes, it can be defined at user level.
10. What does it mean by FLA / TLA?
    User can opt for either FLA (File level authorisation) or TLA (Transaction level authorisation).
11. Is it possible to customise transaction advises?
    Yes, it can be as per customer requirement.
12. Is it possible to send transaction advises to beneficiary.
    Transaction advice can be triggered to email ID which is mapped at the time of beneficiary addition or being mentioned in payment file.
13. How many email / phones no # can be added in a transaction (Bene registration)?
    Total 7 phone numbers / 7 email ID's can be captured while registering a beneficiary.
14. Is it possible to add beneficiary on real time basis and make remittance immediately?
    Yes, user can add beneficiary on ad hoc basis and make remittance.
15. Can I upload beneficiary file?
    Yes, user can upload beneficiary file.