

Web-Wallet Help Manual for Insurance Marketing Firm

Following are the steps to make the payment towards the online training by Web-Wallet Payment for Insurance Marketing Firm

Step 01: Insurance Marketing Firm must have login id and password of Insurance Institute of India website to use web-Wallet facility (www.insuranceinstituteofindia.com)

Step 02: If company profile is not created, then go to following link to create your company profile. [if you have already have id and password, please ignore this step]
<https://www.insuranceinstituteofindia.com/web/guest/to-create-company-profile.jsessionid=73C6144249395634644BC1753795962A>

Step 03: Sign in using id and password-> www.insuranceinstituteofindia.com

Step 04: Using following link, (IRDAI Examinations menu-> Web-Wallet->Create web-wallet or enter UTR No of web-wallet) , first create web-wallet account.
<https://www.insuranceinstituteofindia.com/web/guest/web-wallet-home-page>

Step 05: Then go to web-wallet calculator. You have to enter advance amount, the system will calculate as per follows: Regarding TDS amount, you to make the payment to income tax towards following TDS amount and has to share TDS certificate with us.

By using webwallet, you can save billdesk charges which are deducted if payment done by online mode (Debit Card/ Credit Card / Internet Banking). In this case, you have to make the payment to Income Tax Department towards TDS and submit the TDS certificate to us quarterly.

Advance Amount (Base Amount)	100000
add CGST - 9%	9000
add SGST - 9%	9000
less TDS - 10%	10000
NET Amount	108000

If you have finalized the amount, please save the entry. As soon as you save this entry, it will become **fund request date** and make the payment i.e. **NET amount** by NEFT to us.

To enter the UTR No, please go to “Create webwallet or enter UTR No of webwallet”. The system will ask you the fund request date (on which date you have saved above entry). The system will show the fund request transaction details. By selecting the check box, you can enter UTR No of your NEFT payment which is done by you.

As soon as you will enter UTR No at your end , your payment details will be updated at our end. The maker and checker will check the amount which received at our bank account and UTR No and payment details which is entered by you and approve the same. As soon as super checker approve the amount, you can use base amount.

Step 06 : Utilization of amount : The system will charge Rs. 750/- per candidate towards training now as we have charged GST in the beginning itself.

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Step 07: By using “IRDAI Examinations-> Insurance Marketing Firm-> Bulk file Upload”, Please upload the .xls file. The file contains only URN no. You can enter URN from A1 position. You need not to enter heading.

Step 08: By using “IRDAI Examinations-> Insurance Marketing Firm-> URN Uploaded but payment pending”-> after selecting the upload URN date, the system will show you all the URNs. Select URNs (status will be ‘**To be verified**’) , click on “Verification with IRDAI” -> for all the URNs – the status will change to ‘Verified’ -> After selecting URNs-Verified, you can click on “Make payment” button. The system will ask you “TDS” , you can select “No”.

The system will again show following two options to make the payment. You can select “Webwallet”

- Online payment Webwallet

In the last screen, the system will ask you

- Mobile based online training Internet Based Online Training

1) Mobile App Online Training (Mobile+Web - Online/offline based training)

By using mobile app, candidate can download mobile App E-Learning on the computer system or on Mobile or on both for which internet connection is required.

The candidate can complete the training in online mode for which internet connection is required. The candidate can access the training using the training link <https://iiiindia.org.in>

-----White Listing for Mobile App Online Training -----

App URL - <https://iiiindia.org.in> needs to be white listed. Along with it following URLs need to be also white listed

cdn.firebase.com

firebaseio.com

Above two website serves the library which is used for real time data and chat service.

cdn.rawgit.com

This serves an open source library to support Google's Material Design.

www.youtube.com (not mandatory - users can go through reading material and assessment)

This serves video content

Offline mode Training-> As soon as mobile app is downloaded on computer system or on mobile or on both, candidate can complete the training in offline mode also for which internet connection is not required.

After completing the training offline to update the training hours they have to come in online mode for which internet connection is required. As soon as the training is completed on PC/Laptop or on mobile in offline mode, the system can update training hours which are completed by the candidate either on PC/Laptop and on Mobile App.

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Insurance Marketing Firm will get the dashboard so that they can review live training hours status report.

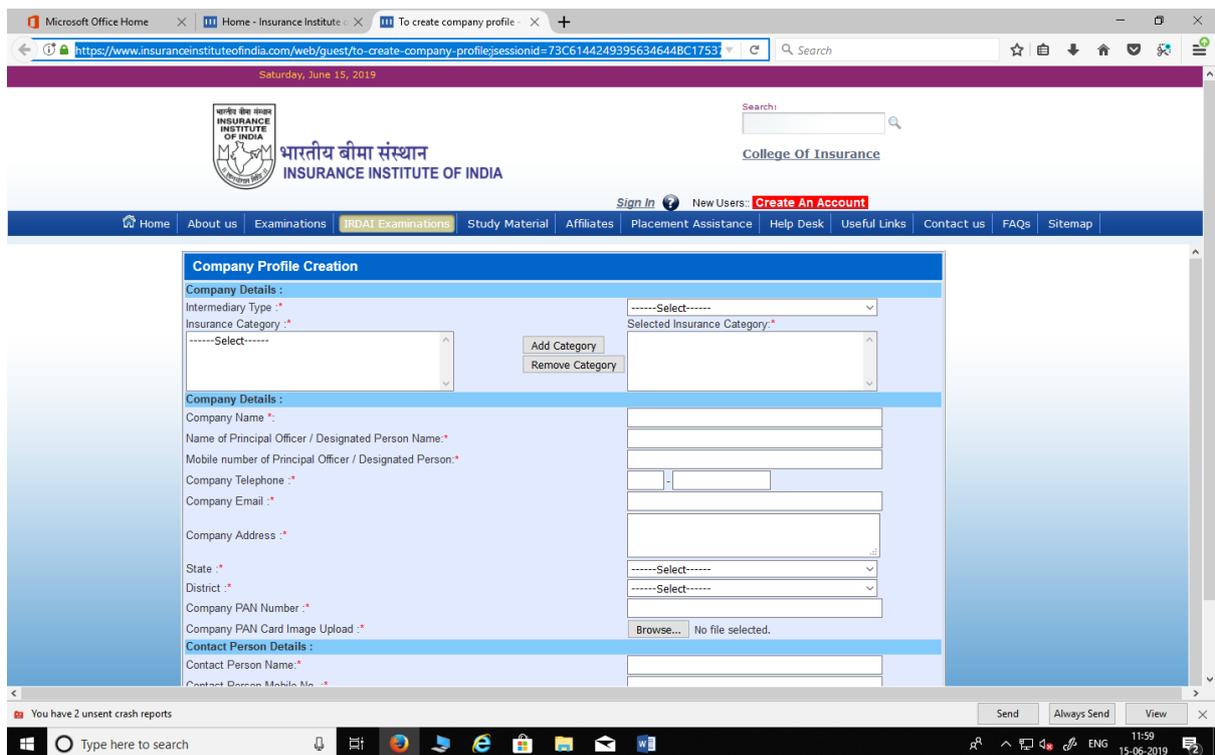
- 2) **Internet Based Online Training** : The candidate can complete the training in online mode for which internet connection is required. The candidate can access the training using the training link <https://iii.learningmate.com/iii/>

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To get ID and Password of www.insuranceinstituteofindia.com

You can create company profile using following link to get ID and Password of www.insuranceinstituteofindia.com.

<https://www.insuranceinstituteofindia.com/web/guest/to-create-company-profile;jsessionid=73C6144249395634644BC1753795962A>



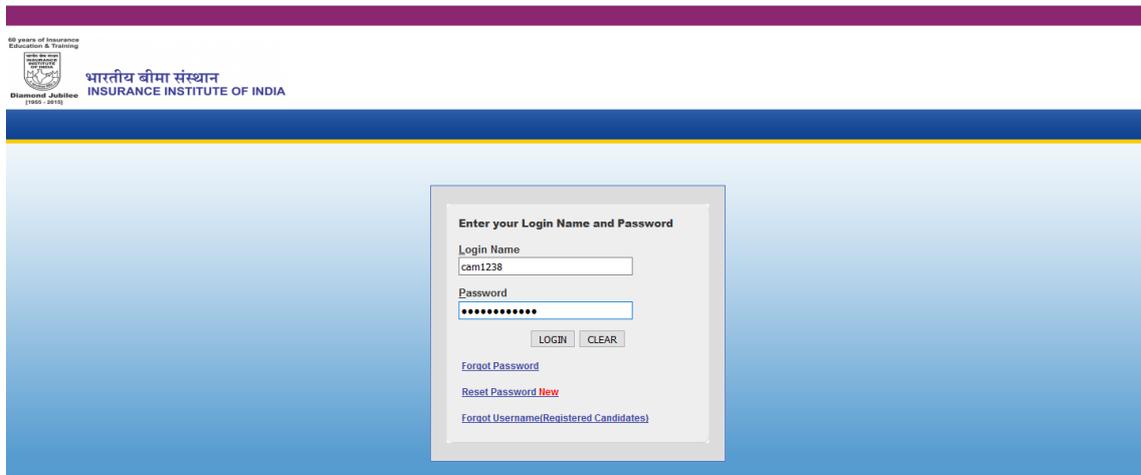
Please visit to insuranceinstituteofindia.com

Please click on "Sign In"

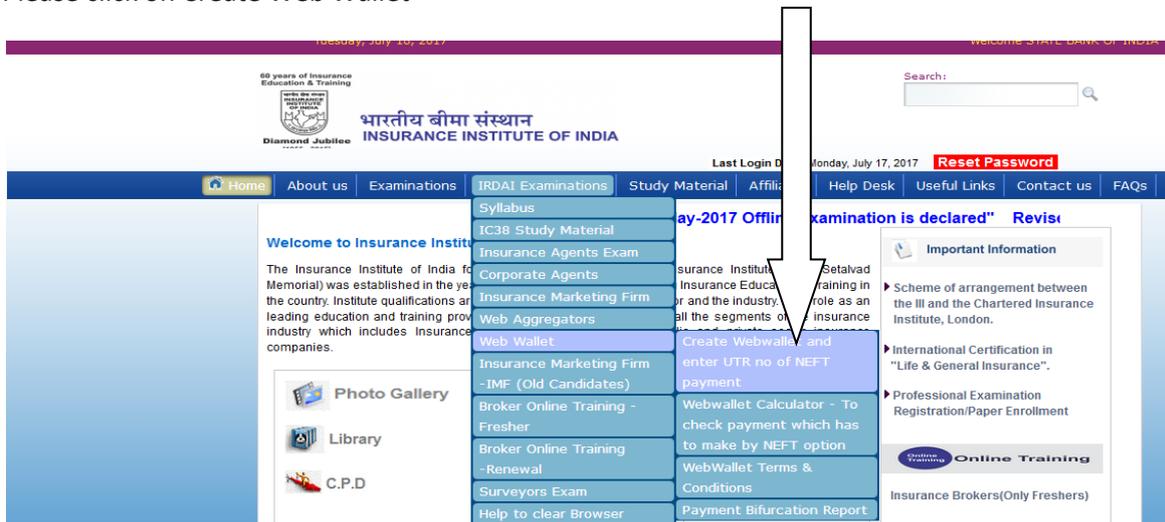


Web-Wallet Help Manual for Insurance Marketing Firm

Please enter your Insurance Marketing Firm Login details of www.insuranceinstituteofindia.com portal.



Please click on Create Web Wallet

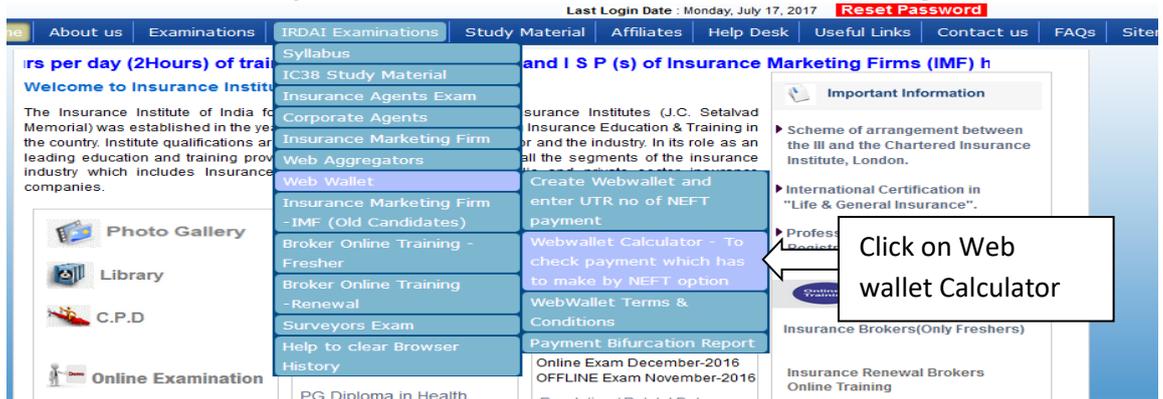


Following Screen will appeared and click on **Yes**

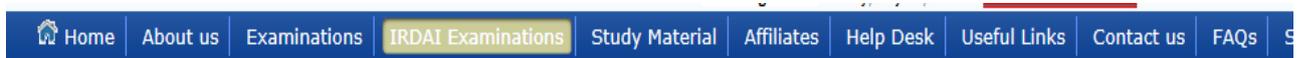


Then go to Web Wallet Calculator. The system will calculate NET amount which you have to pay to us by NEFT. The minimum amount to be transferred in the Web Wallet Account is Rs.30,000/-.

Web-Wallet Help Manual for Insurance Marketing Firm



After Enter **Advance Amount** then click on **Calculate Deposit Amount** to check exactly what is **NET amount you have to pay to us**.



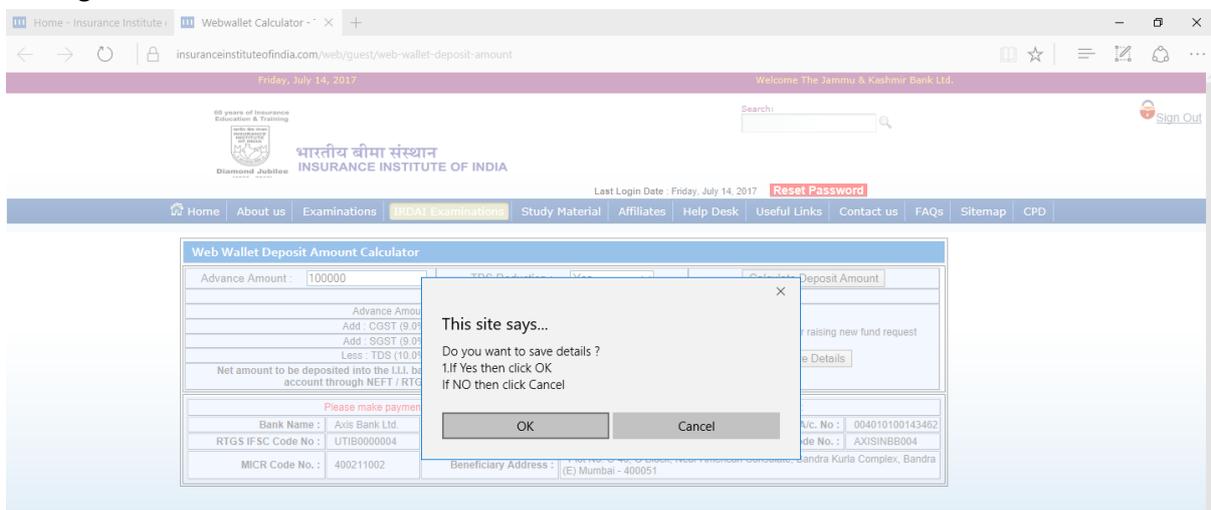
Web Wallet Deposit Amount Calculator

Advance Amount :	<input type="text" value="100000"/>	TDS Deduction :	<input type="text" value="Yes"/>	Calculate Deposit Amount
Advance Amount	100000	Add : CGST (9.0%)	9000	Save calculations for raising new fund request Save Details
Add : SGST (9.0%)	9000	Less : TDS (10.0%)	10000	
Net amount to be deposited into the I.I.I. bank account through NEFT / RTGS		108000.00		
Please make payments through NEFT/RTGS into III Bank Account. Following are the account details :				
Bank Name :	Axis Bank Ltd.	Beneficiary Name :	Insurance Institute of India	Beneficiary A/c. No. :
RTGS IFSC Code No. :	UTIB0000004	Branch Address :	Sir P M Road, Fort, Mumbai - 400001	SWIFT Code No. :
MICR Code No. :	400211002	Beneficiary Address :	Plot No. 1, C.P.D. Complex, Bandra Kuria Complex, Bandra	

This is the Net Amount which you have to pay by NEFT

As soon as you click on **Save details** button, this entry date is your **fund request date**

If you have finalized the amount, then click on **Save Details** button. Screen will show you following message.



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To enter the UTR No of NEFT payment done by you, Go to IRDAI Examinations—Web Wallet—“Create Web wallet/enter UTR no of NEFT payment”

Corporate Profile Creation - X +

insuranceinstituteofindia.com/web/guest/corporate-profile-creation1

Friday, August 04, 2017

Welcome STATE BANK OF INDIA

69 years of Insurance Education & Training

भारतीय बीमा संस्थान
INSURANCE INSTITUTE OF INDIA

69 years of Insurance Education & Training

Search:

Last Login Date : Friday, August 4, 2017 [Reset Password](#)

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Syllabus

Corporate Age Group

IC38 Study Material

Corporate Details:

Insurance Agents Exam

Corporate Agents

Corporate Name *

Insurance Marketing Firm

Corporate Telephone

Web Aggregators

Corporate Email *

Web Wallet

Create Webwallet or enter UTR no of NEFT payment

Corporate Address:

Insurance Marketing Firm

IMF (Old Candidates)

Contact Person Details

Broker Online Training - Fresher

Contact Person *

Broker Online Training - Renewal

Contact Person Mobile

WebWallet Terms & Conditions

Contact Person Telephone

Surveyors Exam

Contact Person Email

Help to clear Browser History

Payment Bifurcation Report

Submit

To Enter UTR No

Select the date – fund request date on which date you have saved this entry by using the option named “Web-Wallet Calculator”.

e.g. In below case fund request date is 14-07-2017 and click on **Search**

Home - Insurance Institute | Webwallet Calculator - To c | Create Webwallet and enter | Create Webwallet and enter | Create Webwallet and e

insuranceinstituteofindia.com/web/guest/web-wallet-home-page

Friday, July 14, 2017

Welcome The Jammu & Kashmir Bank Ltd.

69 years of Insurance Education & Training

भारतीय बीमा संस्थान
INSURANCE INSTITUTE OF INDIA

69 years of Insurance Education & Training

Search:

Sign Out

Last Login Date : Friday, July 14, 2017 [Reset Password](#)

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Web Wallet

Your Current Balance : 0

Please search the previous amount calculations :

Date: From : 14-07-2017 To : 14-07-2017 [Search](#)

Screen shows as follows:-

Last Login Date : Friday, July 14, 2017 [Reset Password](#)

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Web Wallet

Your Current Balance : 0

Do you want to raise new fund request ? Yes

Please search the previous amount calculations :

Date: From : 14-07-2017 To : 14-07-2017 [Search](#)

Select	Sr.No.	Fund Id	Base Amount	Service Tax	SwachBharat Tax	Krishikalyan Tax	TDS Amount	Deposit amount
<input checked="" type="checkbox"/>	1	21146	100000	0	0	0	10000	108000

[Proceed](#)

Kindly select particular record and click on **Proceed**. Fill all the details and click on **Submit**

Web-Wallet Help Manual for Insurance Marketing Firm

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Web Wallet Fund Request Form

Type :	NEFT
Transaction Date :	07-07-2017
Advance Amount :	100000
Deposit Amount :	108000
Name of Bank Through amount deposited :	Jammu and Kashmir Be
UTR No./Transaction No.:	JAKA070717017940
<input type="checkbox"/> I hereby declare that all the details entered are correct.	
<input type="button" value="submit"/>	

As soon as you click on submit button, it will show following screen.

Last Login Date: Friday, July 14, 2017 [Reset Password](#)

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Web Wallet

Your Current Balance : 0

Do you want to raise new fund request?

Pending Requests:

Sr.No.	Fund Id	Base Amount	Service Tax	Swachbharat Tax	Krishikalyan Tax	TDS	Deposit Amount	Request Raised Date	Transaction Date	UTR No.	Bank Name	Status	Action
1	21146	100000	0	0	0	10000	108000	14-07-2017	07-07-2017	JAKA070717017940	Jammu and Kashmir Bank	Pending with Maker	<input type="button" value="Update"/> <input type="button" value="Delete"/>

Fund request raised successfully !!!

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Please refer exact steps to make the registration for online training

1) Bulk File Upload-> To upload the file in .xls format.

The screenshot shows the website's navigation menu with 'Web Wallet' selected. The dropdown menu includes 'Bulk File Upload'. A callout box states: 'To upload the file (.xls) format in which only URNS will be there in the first column.'

2) Please copy URNs in first column and save the file with .xls extension (Excel 97-2003 Workbook)

The screenshot shows an Excel spreadsheet with a list of URNs in column A. A 'Save As' dialog box is open, showing the file name 'URNS_20' and the save type 'Excel 97-2003 Workbook'.

3) The system will ask the file of URNs (.xls extension) which you want to upload.

The screenshot shows the 'Corporate Agent Corporate Wise URN Upload' form. The 'File' field contains 'URNS_20.xls'.

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4) The system will show you following screen.

If You select **TDS – Yes**, in this case TDS amount (10% of training fees) will be deducted from the gross amount. In this case, you have to pay the TDS amount to the Income Tax Authority and have to send the TDS certificate to us”

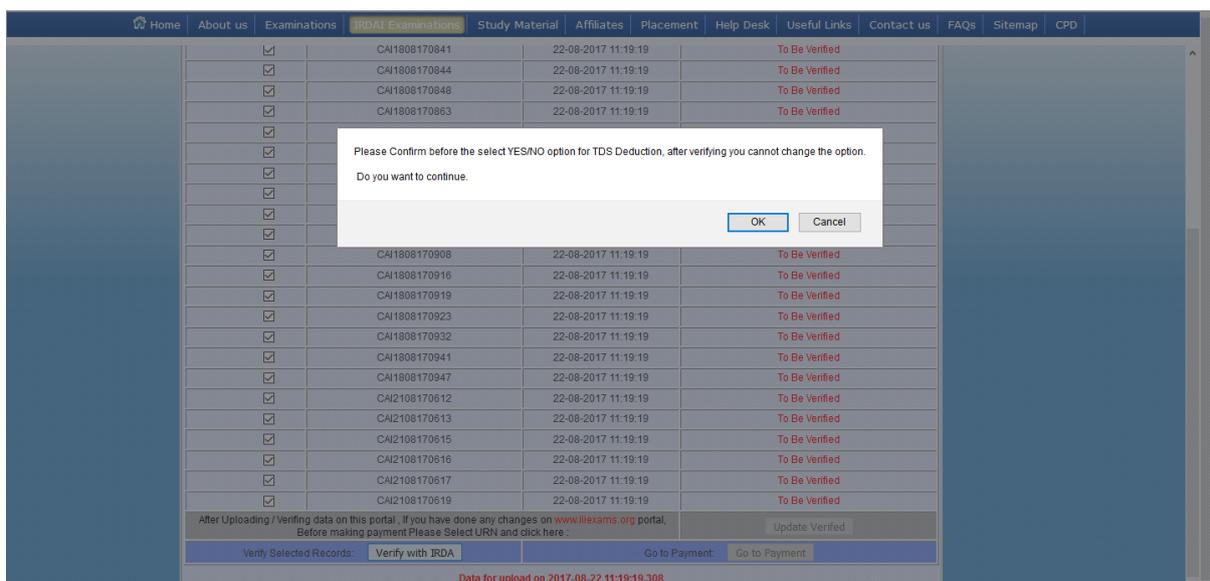
If You select **TDS – No**, in this case TDS amount (10% of training fees) will be not be deducted from the gross amount.



The screenshot shows the 'Corporate Agent Corporate Wise URN Uploaded Details' page. At the top, there is a navigation menu with options like Home, About us, Examinations, IRDAI Examinations, Study Material, Affiliates, Placement, Help Desk, Useful Links, Contact us, FAQs, Sitemap, and CPD. Below the navigation, there is a search bar and a 'Reset Password' button. The main content area displays a table with columns for 'Select All', 'TDS Deduction', 'URN', 'Uploaded Date', and 'Status'. The 'TDS Deduction' dropdown is set to 'No'. A warning message is displayed: 'Once you select TDS Yes/No cannot change afterwards.'

Select All	TDS Deduction	URN	Uploaded Date	Status
<input checked="" type="checkbox"/>	No	CAI1808170794	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	Yes	CAI1808170807	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	No	CAI1808170834	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	Yes	CAI1808170841	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	No	CAI1808170844	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	Yes	CAI1808170848	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	No	CAI1808170863	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	Yes	CAI1808170870	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	No	CAI1808170878	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	Yes	CAI1808170880	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	No	CAI1808170889	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	Yes	CAI1808170900	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	No	CAI1808170903	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	Yes	CAI1808170908	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	No	CAI1808170916	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	Yes	CAI1808170919	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	No	CAI1808170923	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	Yes	CAI1808170932	22-08-2017 11:19:19	To Be Verified

If you have selected “Yes” for “TDS” and proceed further. After that you can not change the option TDS to “No”. Therefore please select TDS – Yes/No option carefully.



The screenshot shows a confirmation dialog box overlaid on the table. The dialog box contains the text: 'Please Confirm before the select YES/NO option for TDS Deduction, after verifying you cannot change the option. Do you want to continue.' with 'OK' and 'Cancel' buttons. The background table is partially visible, showing URN details for CAI1808170841, CAI1808170844, CAI1808170848, and CAI1808170863.

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The screenshot shows a table with columns for URN, Date, and Status. The status for all entries is 'To Be Verified'. A callout box with the text 'Click on "Verify with IRDA"' points to a button labeled 'Verify with IRDA' at the bottom of the table. Below the table, there is a message: 'After Uploading / Verifying data on this portal, If you have done any changes on www.iitexams.org portal, Before making payment Please Select URN and click here.' and a 'Verify with IRDA' button. At the bottom, it says 'Data for upload on 2017-08-22 11:19:19.308'.

After verification, the system will show you following screen.

The screenshot shows the 'Corporate Agent Corporate Wise URN Uploaded Details' screen. It has a search filter with 'From Date' and 'To Date' both set to '22-08-2017'. The 'Status' dropdown is set to 'To Be Verified'. A 'Search' button is present. Below the search area, a message reads: 'No Uploaded URN Details Found Between 2017-08-22 00:00:00.0and 2017-08-22 23:59:59.0'.

Please select "To Do Payment" Filter as follows:

The screenshot shows the same 'Corporate Agent Corporate Wise URN Uploaded Details' screen. The 'Status' dropdown menu is open, and 'To Do Payment' is selected. The dropdown menu includes options: 'To Be Verified', 'ALL', 'To Do Payment', 'Payment Not Completed', 'No Data Found', 'Duplicate Entry', 'Payment Done', 'Tried Through Single Payment - Payment Not Done', and 'Tried Through Single Payment - Payment Done'. The message below the search area now reads: 'No Uploaded URN Details Fou 59.0'.

Web-Wallet Help Manual for Insurance Marketing Firm

The screen will appear as per follows:

Corporate Agent Corporate Wise URN Uploaded Details

From Date*: 22-08-2017 To Date*: 22-08-2017 [Reset Dates](#)

URN: Status: * To Do Payment [Search](#)

Select All <input checked="" type="checkbox"/>	URN	Uploaded Date	Status
<input checked="" type="checkbox"/>	CA1808170794	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170807	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170834	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170841	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170844	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170848	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170863	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170870	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170878	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170880	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170889	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170900	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170903	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170908	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170916	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170919	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170923	22-08-2017 11:19:19	To Do Payment

Corporate Agent Corporate Wise URN Uploaded Details

From Date*: 22-08-2017 To Date*: 22-08-2017 [Reset Dates](#)

URN: Status: * To Do Payment [Search](#)

Select All <input checked="" type="checkbox"/>	URN	Uploaded Date	Status
<input checked="" type="checkbox"/>	CA1808170844	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170848	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170863	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170870	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170878	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170880	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170889	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170900	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170903	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170908	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170916	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170919	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170923	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170932	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170941	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA1808170947	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA2108170612	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA2108170613	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA2108170615	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA2108170616	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA2108170617	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA2108170619	22-08-2017 11:19:19	To Do Payment

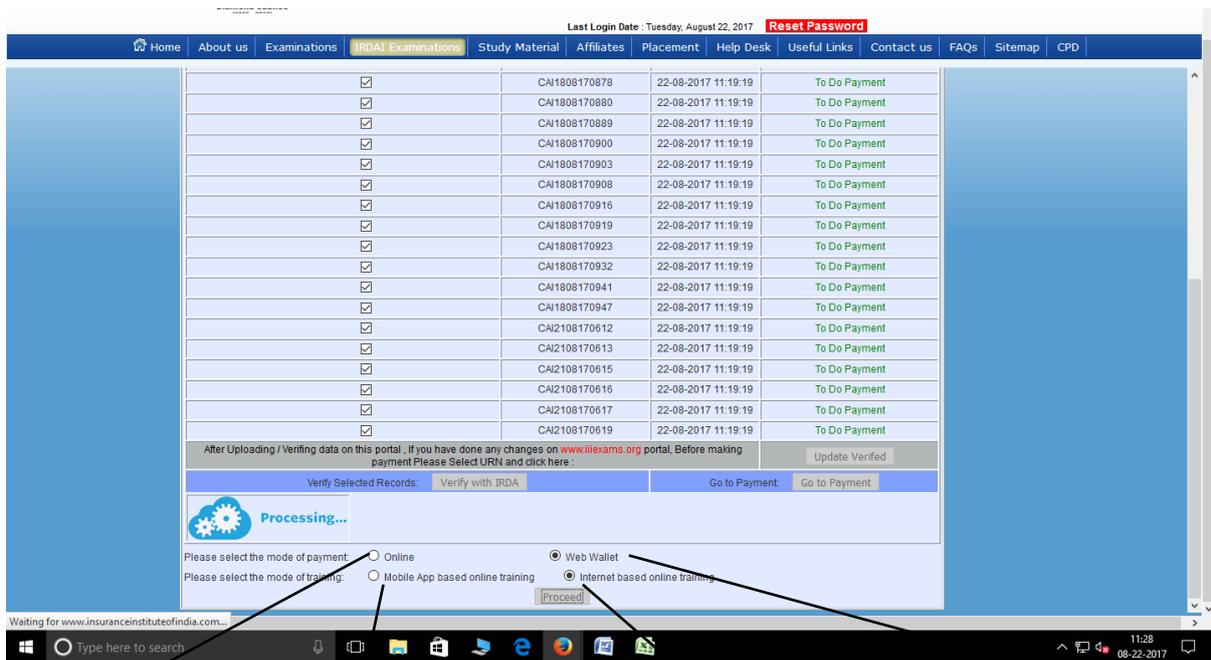
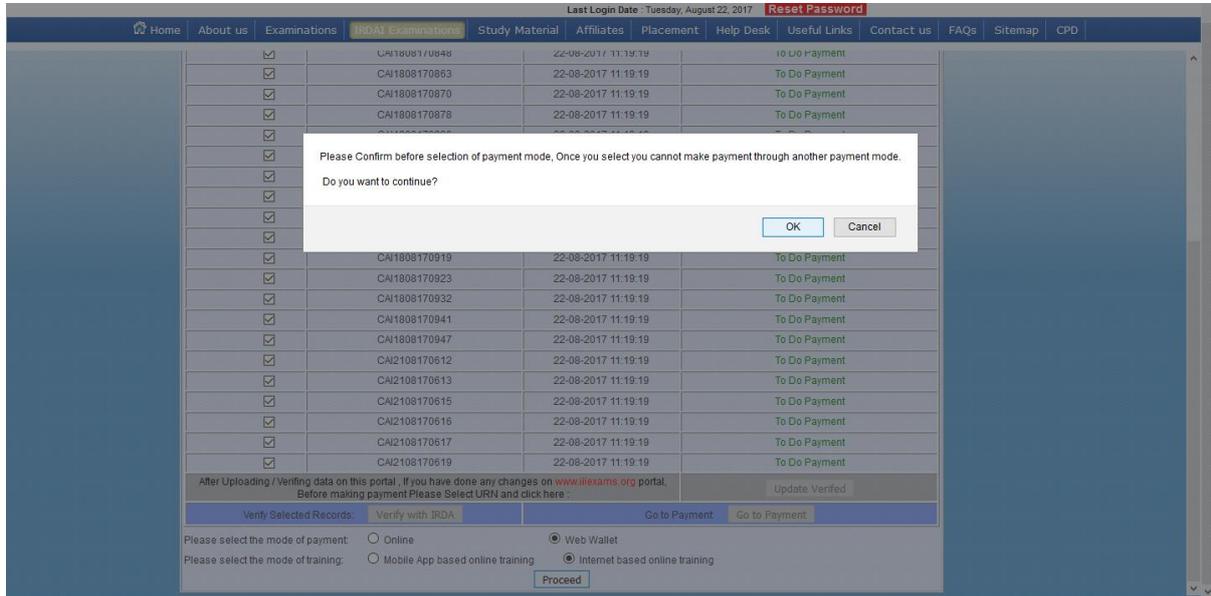
After Uploading / Verifying data on this portal. If you have done any changes on www.iiaexams.org portal, Before making payment Please Select URN and click here: [Update Verified](#)

Verify Selected Records: [Verify with IRDA](#) [Go to Payment](#) [Go to Payment](#)

Please click on "Go to Payment"

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Please note that if you select online and proceed further, you can not change payment to “Webwallet”for the current transaction. If you select Webwallet and proceed further, you can change payment mode to “Online” for the current transaction.



You can use Online option if you want to make the payment using “Debit Card/Credit Card/ Internet Banking”

(Mobile App+ Web) Based Online Training, You will get dashboard to see the current status of training of all the candidates.

Existing Learning Mate System (Internet Based Online Training)

If you want to make the payment by Web-Wallet

Web-Wallet Help Manual for Insurance Marketing Firm

The screenshot shows a web browser window displaying the Insurance Institute of India website. The page title is "Corporate Wise Payment Confirmation For Web Wallet". The form contains the following information:

Date : 22/08/2017	Order No : 97114001
Candidate Name	*Axis Bank Ltd*
Email	sakharam.kode@axisbank.com
Mobile	9821458542
Payment Details	
Corporate Id	1227
No Of Candidates	26
Grand Total	19500

I have read and understood the Help Manual available on website.
I agree that decision of I.I in all the matters will be final and binding upon me.

Please Confirm

Yes No

Below are the details for white listing process. In case a bank asks you details please forward the below write up.