

## 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](http://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/corporate-profile-creation1> )

**Step 03:** Sign in using id and password-> [www.insuranceinstituteofindia.com](http://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.**

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

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](https://cdn.firebase.com)

[firebaseio.com](https://firebaseio.com)

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

[cdn.rawgit.com](https://cdn.rawgit.com)

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

[www.youtube.com](https://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.

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

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- 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/>

# Web-Wallet Help Manual for Insurance Marketing Firm

To get ID and Password of [www.insuranceinstituteofindia.com](http://www.insuranceinstituteofindia.com)

You can create company profile using following link to get ID and Password of [www.insuranceinstituteofindia.com](http://www.insuranceinstituteofindia.com). Your company should come automatically so that you can enter your company details. But your company name does not show automatically, please mail us on [reg.exams@iii.org.in](mailto:reg.exams@iii.org.in).

<https://www.insuranceinstituteofindia.com/web/guest/corporate-profile-creation1>

The screenshot shows a web browser window with the URL <https://www.insuranceinstituteofindia.com/web/guest/corporate-profile-creation1>. The page title is "Corporate Agent Corporate Profile Creation". The form is divided into two main sections: "Corporate Details" and "Contact Person Details".

**Corporate Details:**

- Corporate Name \*
- Corporate Telephone \*
- Corporate Email \*
- Corporate Address :

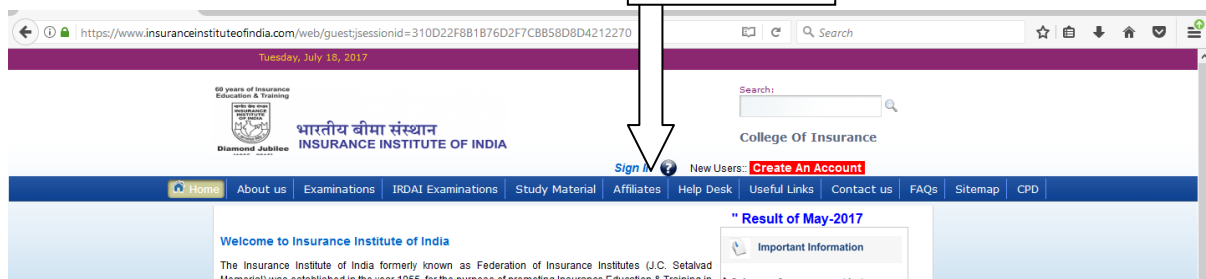
**Contact Person Details:**

- Contact Person \*
- Contact Person Mobile No. \*
- Contact Person Telephone :
- Contact Person Email \*

A "Submit" button is located at the bottom right of the form.

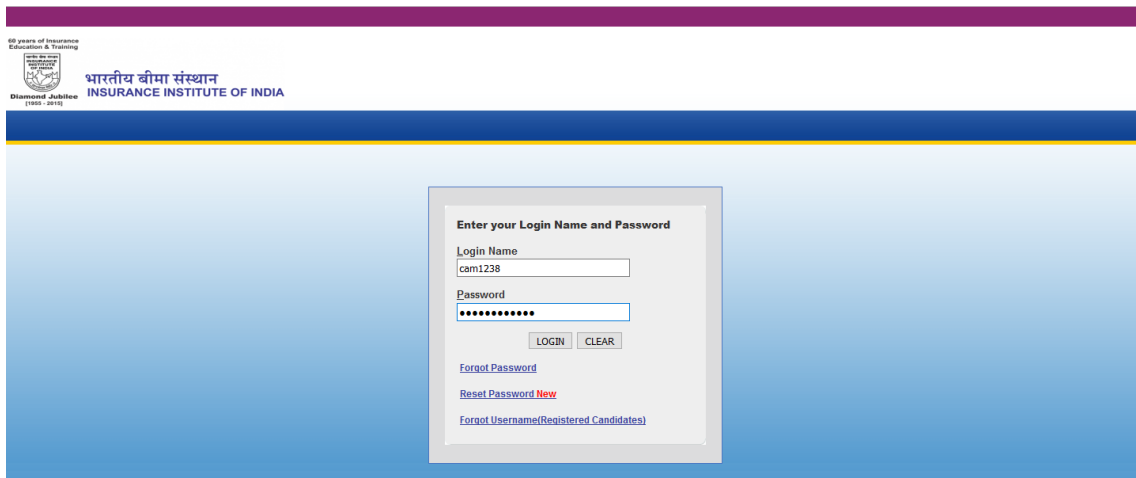
Please visit to [insuranceinstituteofindia.com](http://insuranceinstituteofindia.com)

Please click on "Sign In"

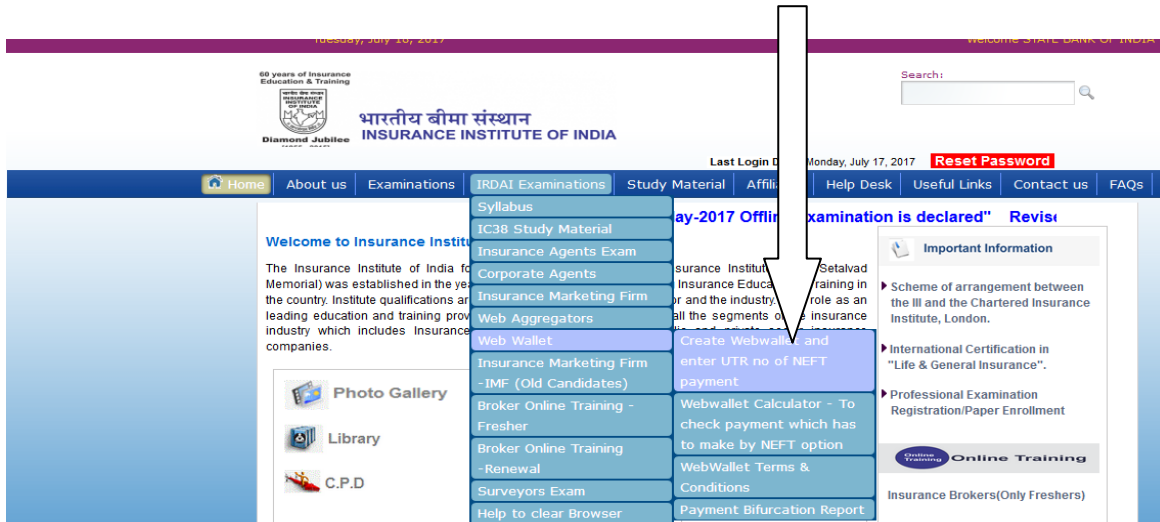


# Web-Wallet Help Manual for Insurance Marketing Firm

Please enter your Insurance Marketing Firm Login details of [www.insuranceinstituteofindia.com](http://www.insuranceinstituteofindia.com) portal.



Please click on Create Web Wallet



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

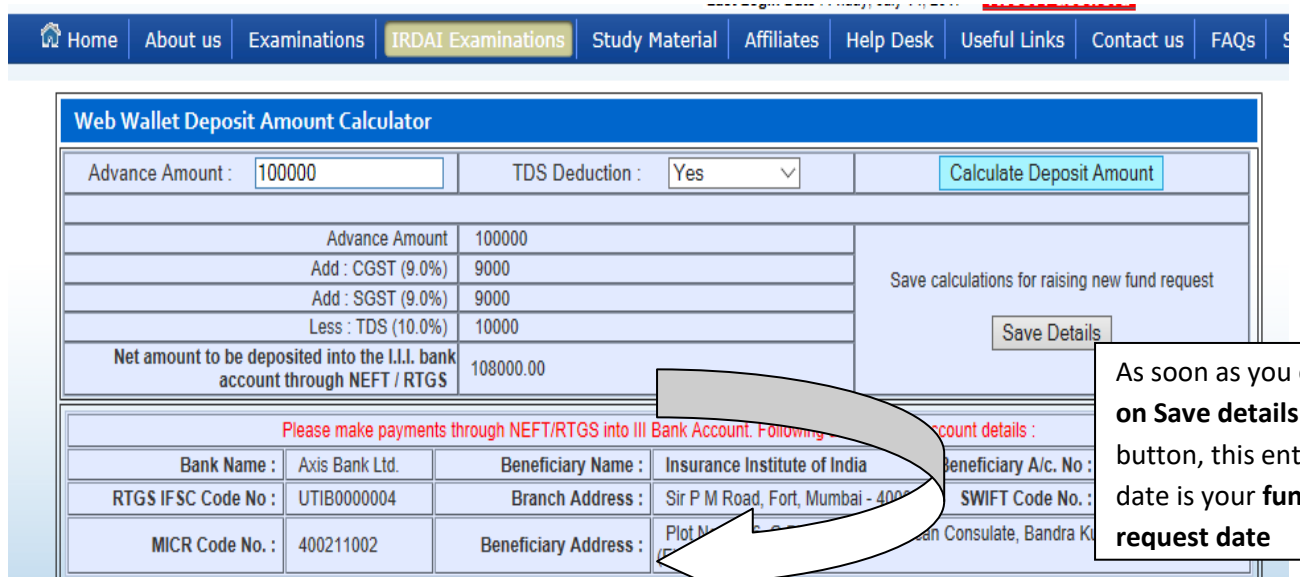


Then go to Web Wallet Calculator. The system will calculate NET amount which you have to pay to us by NEFT. The minimum amount to be transferred in the Web Wallet Account is Rs.50,000/-.

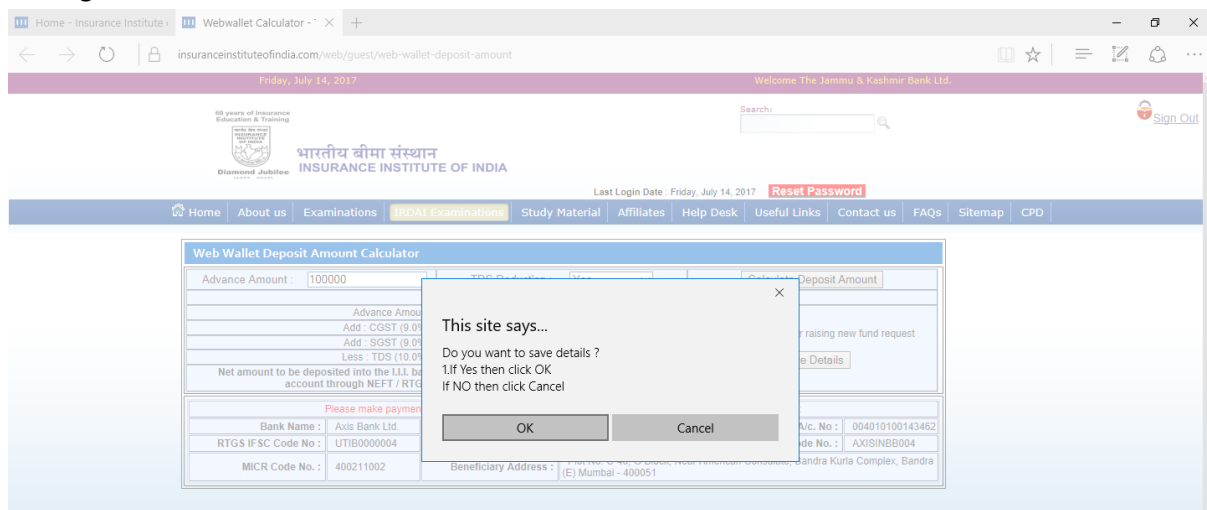
# Web-Wallet Help Manual for Insurance Marketing Firm



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



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”

The screenshot shows the 'Corporate Profile Creation' page. The 'Web Wallet' menu is expanded, and the option 'Create Webwallet or enter UTR no of NEFT payment' is highlighted. A callout box with an arrow points to this option, containing the text '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**

The screenshot shows the 'Web Wallet Calculator' page. The 'Date' field is set to '14-07-2017' and the 'Search' button is visible.

Screen shows as follows:-

The screenshot shows the 'Web Wallet' page with a table of fund request records. The first record is selected, and the 'Proceed' button is visible.

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	100000

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

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

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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 Bc
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"/>

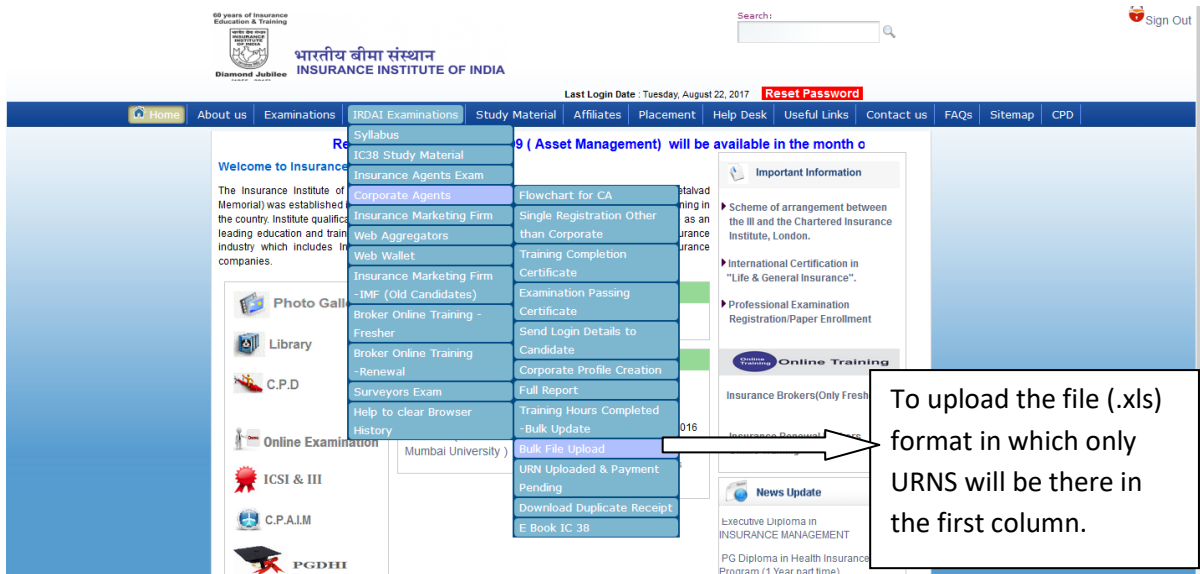
Fund request raised successfully !!!



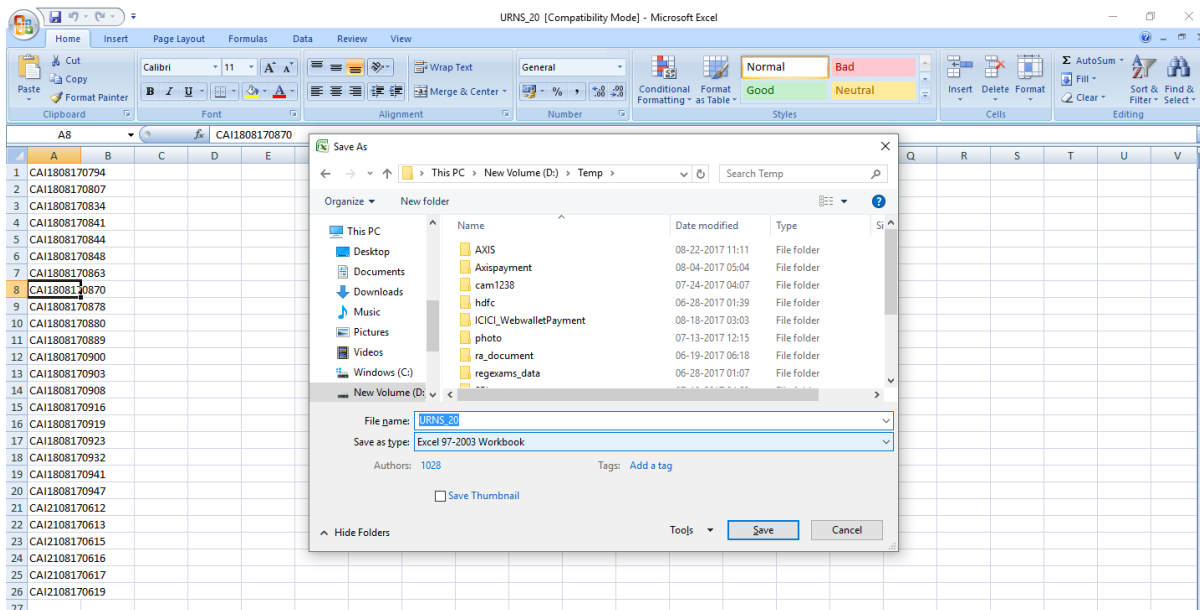
# Web-Wallet Help Manual for Insurance Marketing Firm

Please refer exact steps to make the registration for online training

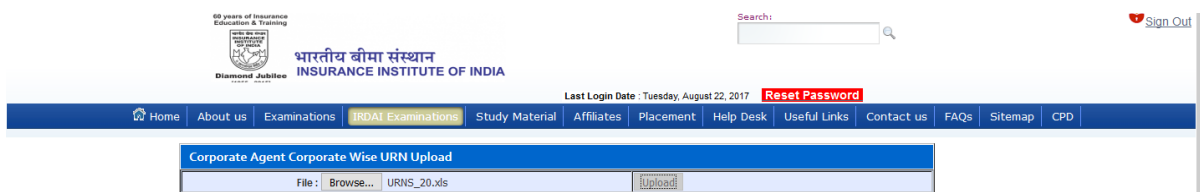
- 1) Bulk File Upload-> To upload the file in .xls format.



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



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



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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 search bar and a 'Reset Password' button. Below the search bar, there are fields for 'From Date' (22-08-2017) and 'To Date' (22-08-2017), and a 'Reset Dates' button. A 'URN' field and a 'Status' dropdown (set to 'To Be Verified') are also present. A 'Search' button is located below these fields. The 'TDS Deduction' dropdown is set to 'No'. A warning message states: 'Once you select TDS [No] cannot change afterwards.' Below this, there is a table with columns: 'Select All', 'Yes', 'URN', 'Uploaded Date', and 'Status'. The table contains 18 rows of data, all with 'To Be Verified' status.

Select All	Yes	URN	Uploaded Date	Status
<input checked="" type="checkbox"/>	No	08170794	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170807	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170834	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170841	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170844	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170848	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170863	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170870	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170878	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170880	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170889	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170900	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170903	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170908	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170916	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170919	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170923	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170932	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 the same URN table as above, but with a confirmation dialog box overlaid. 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.' There are 'OK' and 'Cancel' buttons at the bottom of the dialog box.

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The screenshot shows the 'IRDAI Examinations' section of the website. A table lists various URNs (e.g., CAI1808170841, CAI1808170844) with their respective dates and statuses, all marked as 'To Be Verified'. At the bottom of the table, there are buttons for 'Verify with IRDA' and 'Go to Payment'. A callout box with a white background and black border points to the 'Verify with IRDA' button, containing the text: 'Click on "Verify with IRDA"'. Below the table, a message reads: '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 features a search form with 'From Date' and 'To Date' both set to '22-08-2017'. The 'Status' dropdown menu is open and set to 'To Be Verified'. A 'Search' button is located below the form. A red message at the bottom of the screen states: '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:

This screenshot is similar to the previous one, but the 'Status' dropdown menu is open and 'To Do Payment' is selected. The dropdown menu lists several options: '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 'To Do Payment' option is highlighted in blue. The red message at the bottom of the screen now reads: 'No Uploaded URN Details Found 59.0'.

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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:  [Search](#)

Select All	URN	Uploaded Date	Status
<input checked="" type="checkbox"/>	CAI1808170794	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170807	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170834	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170841	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170844	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170848	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170863	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170870	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170878	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170880	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170889	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170900	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170903	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170908	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170916	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170919	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170923	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:  [Search](#)

Select All	URN	Uploaded Date	Status
<input checked="" type="checkbox"/>	CAI1808170844	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170844	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170848	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170863	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170870	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170878	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170880	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170889	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170900	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170903	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170908	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170916	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170919	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170923	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170932	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170941	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI1808170947	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI2108170612	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI2108170613	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI2108170615	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI2108170616	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI2108170617	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CAI2108170619	22-08-2017 11:19:19	To Do Payment

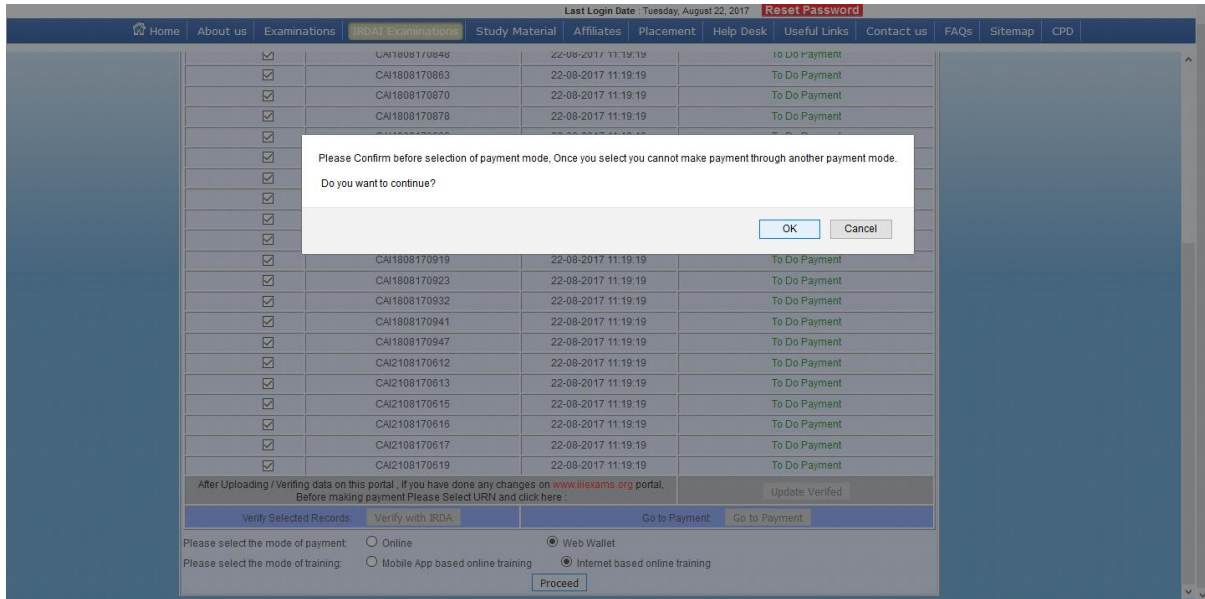
After Uploading / Verifying data on this portal. If you have done any changes on [www.iitexams.org](http://www.iitexams.org) portal, Before making payment Please Select URN and click here. [Update Verified](#)

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 data:

Corporate Wise Payment Confirmation For Web Wallet	
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

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