

## Online Payment Help Manual for Web Aggregators

**Following are the steps to make the payment towards the online training by Online Payment for Web Aggregator**

**Step 01:** Web Aggregator 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:** By using “IRDAI Examinations-> Web Aggregator-> 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 05:** By using “IRDAI Examinations-> Web Aggregator-> 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.

**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.

Web Aggregator 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.

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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 the 'Corporate Agent Corporate Profile Creation' form. It is divided into two main sections: 'Corporate Details' and 'Contact Person Details'. Each section contains several input fields for text and a 'Submit' button at the bottom.

Corporate Details :	
Corporate Name :*	<input type="text"/>
Corporate Telephone :*	<input type="text"/>
Corporate Email :*	<input type="text"/>
Corporate Address :	<input type="text"/>
Contact Person Details :	
Contact Person :*	<input type="text"/>
Contact Person Mobile No. :*	<input type="text"/>
Contact Person Telephone :	<input type="text"/>
Contact Person Email :*	<input type="text"/>
<input type="button" value="Submit"/>	

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



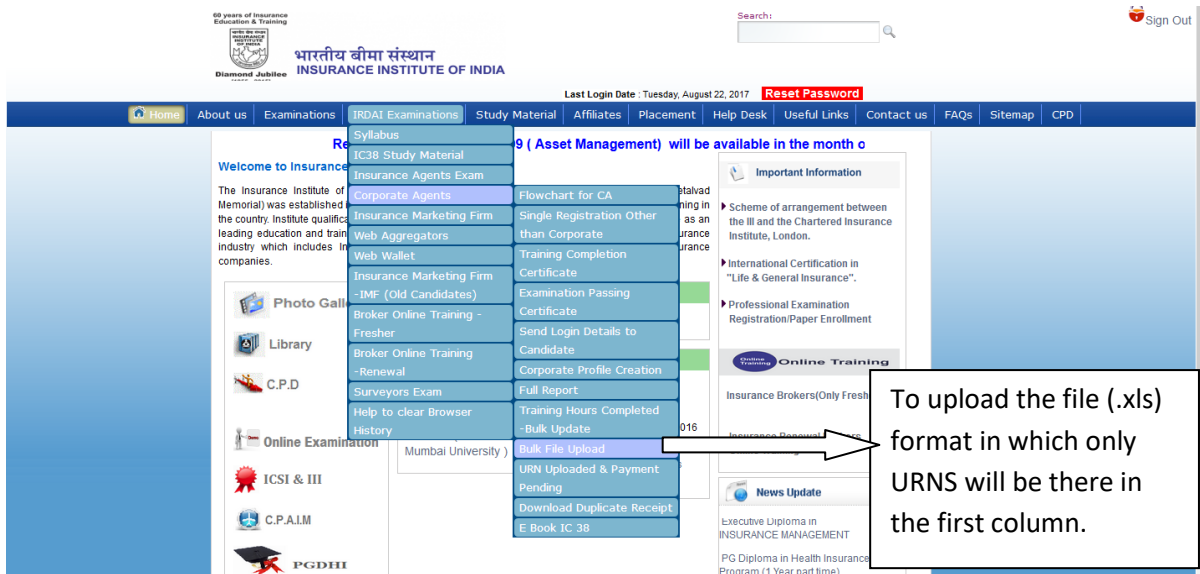
Please enter your Web Aggregator Login details of [www.insuranceinstituteofindia.com](http://www.insuranceinstituteofindia.com) portal.

The screenshot shows the login form titled 'Enter your Login Name and Password'. It contains two input fields: 'Login Name' with the value 'cam1238' and 'Password' with masked characters. Below the fields are 'LOGIN' and 'CLEAR' buttons. There are also links for 'Forgot Password', 'Reset Password New', and 'Forgot Username(Registered Candidates)'.

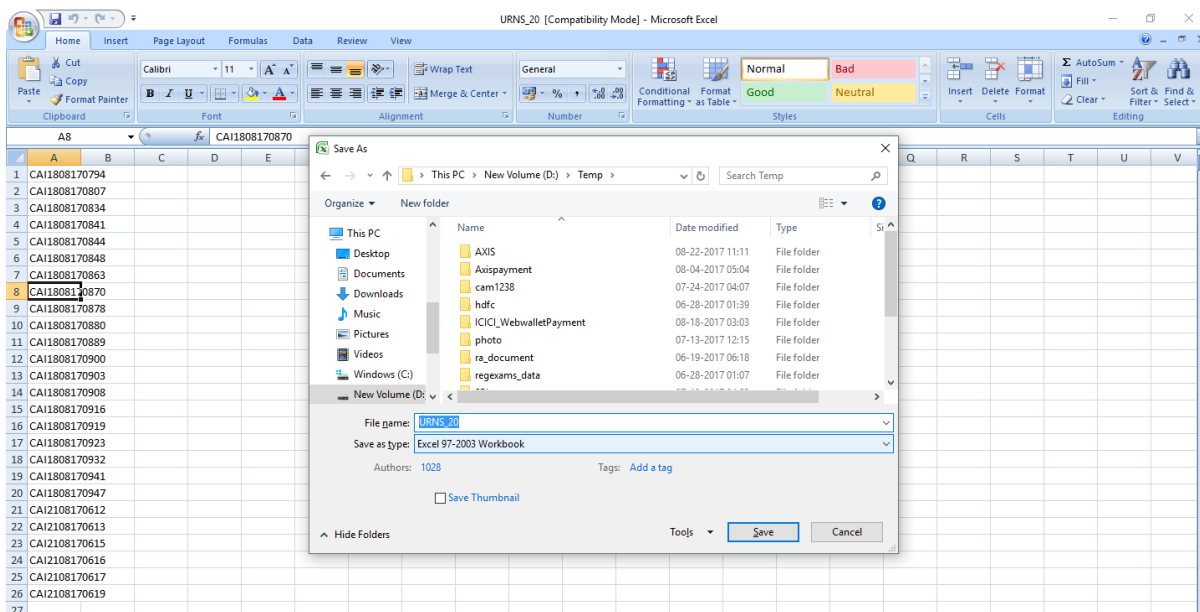
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Please refer exact steps to make the registration for online training

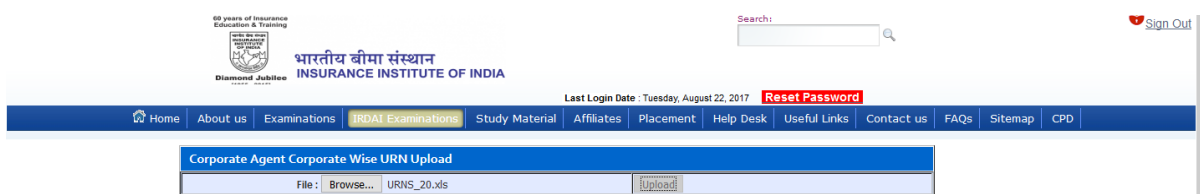
- 1) Bulk File Upload-> To upload the file in .xls format.



- 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 filter for 'TDS Deduction' with options 'Yes' and 'No'. Below the filter is a table with columns: 'Select All', 'URN', 'Uploaded Date', and 'Status'. The table contains 18 rows of data, all with a status of 'To Be Verified'.

Select All	URN	Uploaded Date	Status
<input checked="" type="checkbox"/>	08170794	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170807	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170834	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170841	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170844	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170848	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170863	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170870	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170878	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170880	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170889	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170900	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170903	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170908	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170916	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170919	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	CAI1808170923	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	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 the same 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.' with 'OK' and 'Cancel' buttons.

At the bottom of the page, there is a footer with the text: 'Data for upload on 2017-08-22 11:19:19.308'.

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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'. Below the table, there are buttons for 'Verify with IRDA' and 'Go to Payment'. A callout box with the text 'Click on "Verify with IRDA"' points to the 'Verify with IRDA' button.

URN	Date	Status
CAI1808170841	22-08-2017 11:19:19	To Be Verified
CAI1808170844	22-08-2017 11:19:19	To Be Verified
CAI1808170848	22-08-2017 11:19:19	To Be Verified
CAI1808170863	22-08-2017 11:19:19	To Be Verified
CAI1808170870	22-08-2017 11:19:19	To Be Verified
CAI1808170878	22-08-2017 11:19:19	To Be Verified
CAI1808170880	22-08-2017 11:19:19	To Be Verified
CAI1808170889	22-08-2017 11:19:19	To Be Verified
CAI1808170900	22-08-2017 11:19:19	To Be Verified
CAI1808170903	22-08-2017 11:19:19	To Be Verified
CAI1808170908	22-08-2017 11:19:19	To Be Verified
CAI1808170916	22-08-2017 11:19:19	To Be Verified
CAI1808170919	22-08-2017 11:19:19	To Be Verified
CAI1808170923	22-08-2017 11:19:19	To Be Verified
CAI1808170932	22-08-2017 11:19:19	To Be Verified
CAI1808170941	22-08-2017 11:19:19	To Be Verified
CAI1808170947	22-08-2017 11:19:19	To Be Verified
CAI2108170612	22-08-2017 11:19:19	To Be Verified
CAI2108170613	22-08-2017 11:19:19	To Be Verified
CAI2108170615	22-08-2017 11:19:19	To Be Verified
CAI2108170616	22-08-2017 11:19:19	To Be Verified
CAI2108170617	22-08-2017 11:19:19	To Be Verified
CAI2108170619	22-08-2017 11:19:19	To Be Verified

After verification, the system will show you following screen.

The screenshot shows the 'Corporate Agent Corporate Wise URN Uploaded Details' screen. The 'Status' dropdown menu is set to 'To Be Verified'. Below the search area, a message reads: 'No Uploaded URN Details Found Between 2017-08-22 00:00:00.0 and 2017-08-22 23:59:59.0'.

Please select "To Do Payment" Filter as follows:

The screenshot shows the 'Corporate Agent Corporate Wise URN Uploaded Details' screen with the 'Status' dropdown menu open. The 'To Do Payment' option is selected. The message below the search area now reads: 'No Uploaded URN Details Found 59.0'.

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The screen will appear as per follows:

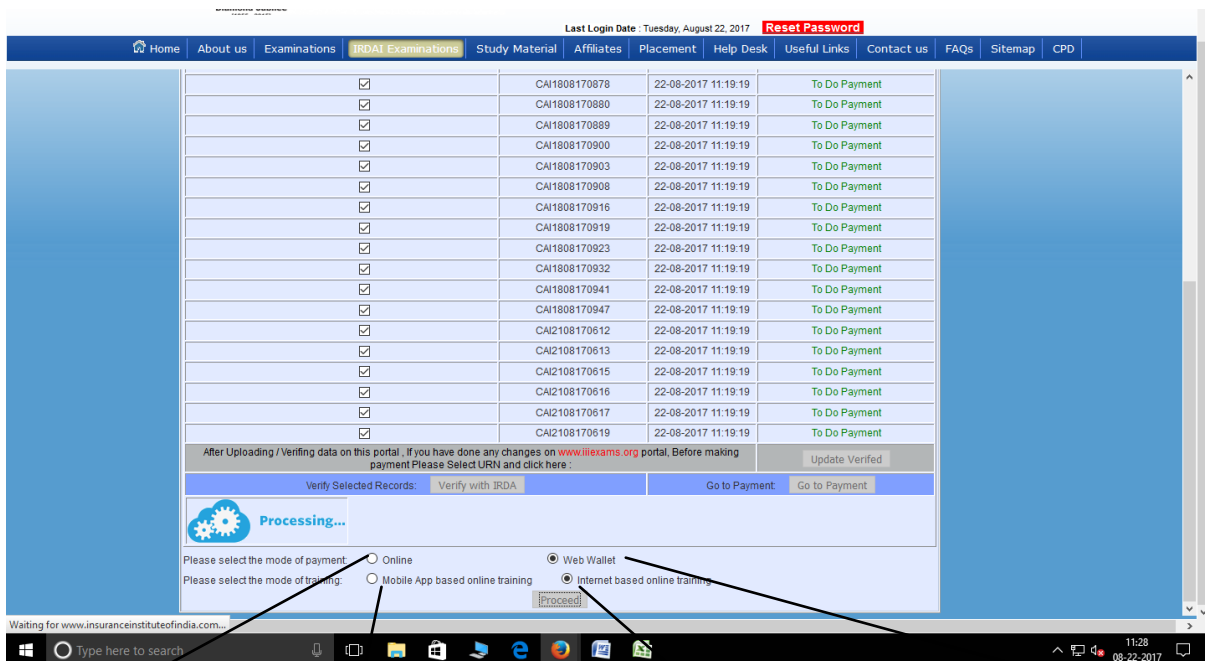
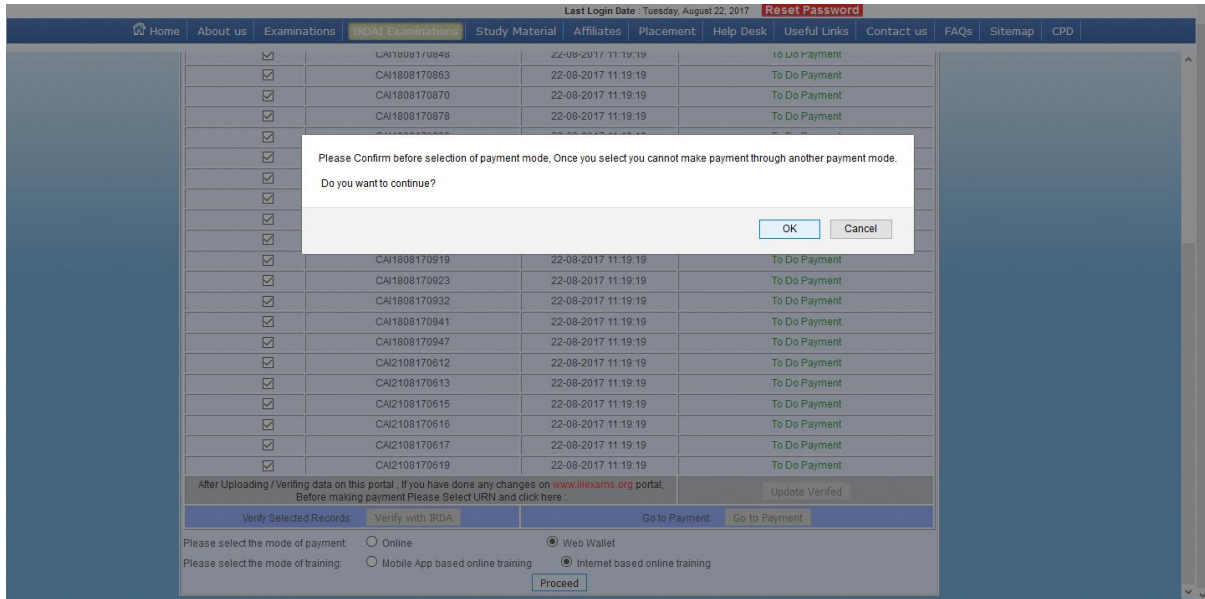
The screenshot shows the 'Corporate Agent Corporate Wise URN Uploaded Details' page. At the top, there is a search bar and a 'Sign Out' button. Below the navigation menu, the page title is 'Corporate Agent Corporate Wise URN Uploaded Details'. There are filters for 'From Date' (22-08-2017) and 'To Date' (22-08-2017), and a 'Status' dropdown set to 'To Do Payment'. A 'Search' button is present. The main table has the following data:

Select All	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

This screenshot is similar to the one above but shows more rows in the table. At the bottom of the table, there is a message: 'After Uploading / Verifying data on this portal, if you have done any changes on www.iilexams.org portal, Before making payment Please Select URN and click here:'. Below this message, there are buttons for 'Update Verified', 'Verify Selected Records', 'Verify with IRDA', and 'Go to Payment'. A callout box with an arrow points to the 'Go to Payment' button, containing the text: 'Please click on "Go to Payment"'. The 'Go to Payment' button is highlighted in blue.

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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

# Online Payment Help Manual for Web Aggregators

The screenshot displays the Insurance Institute of India website interface. At the top, there is a navigation menu with links for Home, About us, Examinations, IRDAI Examinations, Study Material, Affiliates, Placement, Help Desk, Useful Links, Contact us, FAQs, Sitemap, and CPD. The main content area features a blue header for the 'Corporate Wise Payment Confirmation For Web Wallet' form. The form contains the following information:

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 II in all the matters will be final and binding upon me.

Please Confirm

The bottom of the screenshot shows the Windows taskbar with the search bar and system tray, indicating the time as 11:28 on 08-22-2017.