

Online Payment Help Manual for Insurance Marketing Firm

Following are the steps to make the payment towards the online training by Online 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=7B324A040C633409C114ED8A533B0C28>

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

Step 04: By using “IRDAI Examinations-> Corporate Agent-> 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-> Corporate Agent-> 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.

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.

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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=7B324A040C633409C114ED8A533B0C28>

Please click on "Sign In"

Please visit to insuranceinstituteofindia.com

<https://www.insuranceinstituteofindia.com/web/guest/to-create-company-profile;jsessionid=7B324A040C633409C114ED8A533B0C28>

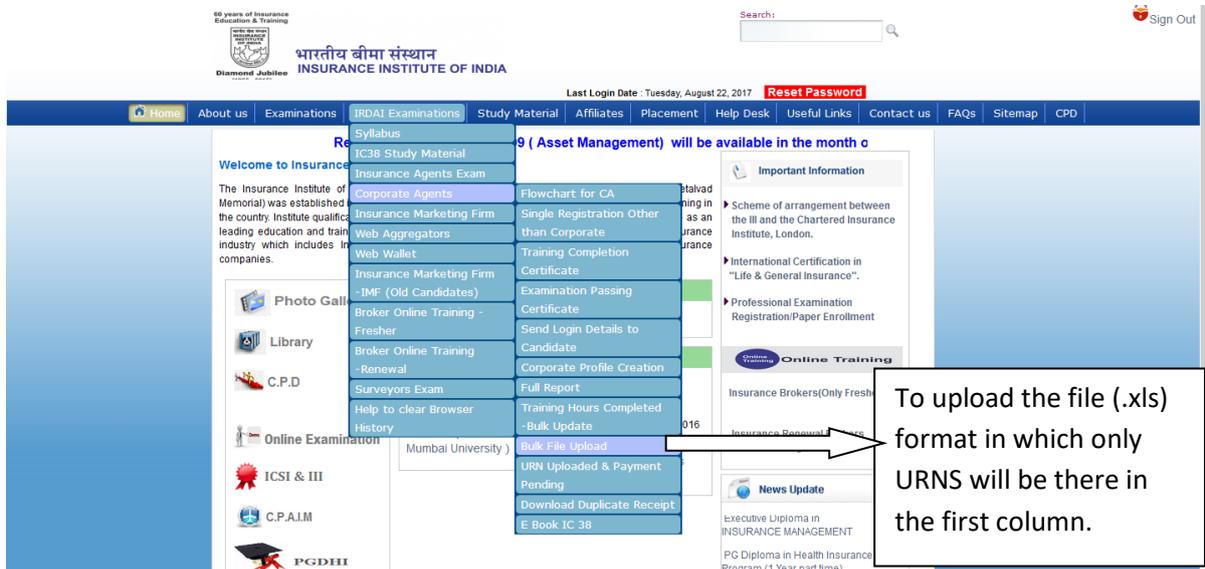


Please enter your Insurance Marketing FirmLogin details of www.insuranceinstuteofindia.com portal.

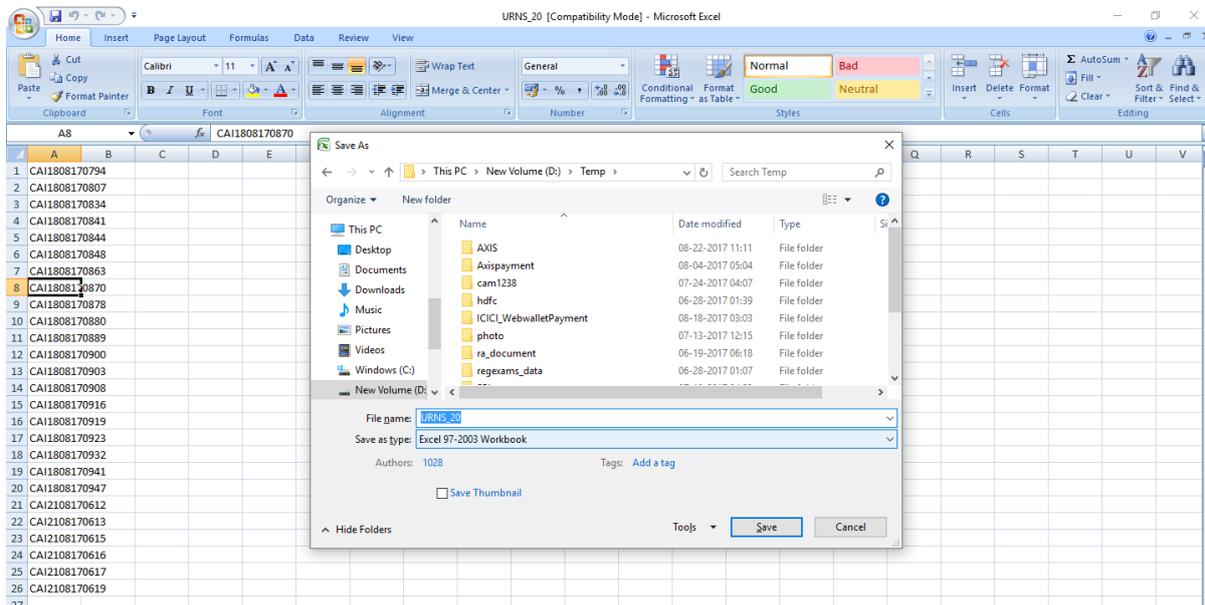
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Please refer exact steps to make the registration for online training

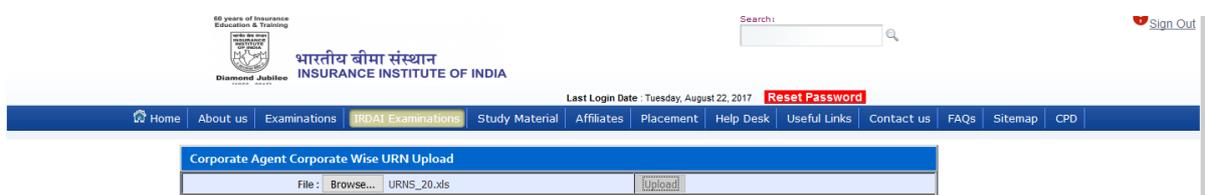
1) Bulk File Upload-> To upload the file in .xls format.



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. The 'TDS Deduction' dropdown is set to 'No'. The table below shows the following data:

Select All	Yes	URN	Uploaded Date	Status
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08170794	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170807	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170834	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170841	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170844	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170848	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170863	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170870	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170878	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170880	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170889	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170900	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170903	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170908	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170916	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170919	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170923	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<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 a confirmation dialog box with the following text:

Please Confirm before the select YES/NO option for TDS Deduction, after verifying you cannot change the option.
Do you want to continue.

Buttons: OK, Cancel

Below the dialog box, the table continues with the following data:

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170908	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170916	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170919	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170923	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170932	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170941	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI1808170947	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI2108170912	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI2108170913	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI2108170915	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI2108170916	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI2108170917	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAI2108170919	22-08-2017 11:19:19	To Be Verified

At the bottom, there are buttons for 'Verify Selected Records', 'Verify with IRDA', and 'Go to Payment'. A footer note reads: 'Data for upload on 2017-08-22 11:19:19.308'.

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The screenshot shows the 'IRDAI Examinations' section of the website. A table lists various URNs with their upload dates and statuses. A callout box with an arrow points to the 'Verify with IRDA' button at the bottom of the table.

URN	Upload 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

Buttons at the bottom: Verify with IRDA, Go to Payment, Update Verified.

Data for upload on 2017-08-22 11:19:19.308

Click on "Verify with IRDA"

After verification, the system will show you following screen.

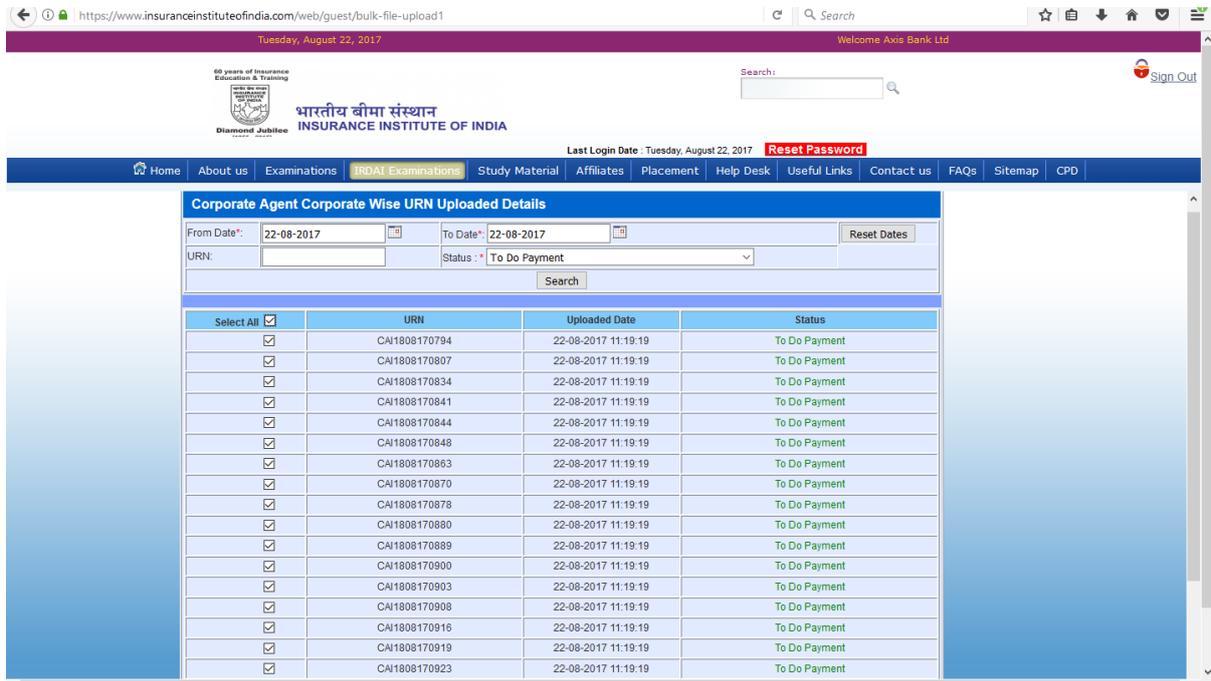
The screenshot shows the 'Corporate Agent Corporate Wise URN Uploaded Details' page. The 'Status' dropdown menu is set to 'To Be Verified'. The search results area is empty, displaying the message: 'No Uploaded URN Details Found Between 2017-08-22 00:00:00.0 and 2017-08-22 23:59:59.0'.

Please select "To Do Payment" Filter as follows:

The screenshot shows the same 'Corporate Agent Corporate Wise URN Uploaded Details' page, but the 'Status' dropdown menu is now open and 'To Do Payment' is selected. The search results area remains empty with the same message: 'No Uploaded URN Details Found Between 2017-08-22 00:00:00.0 and 2017-08-22 23:59:59.0'.

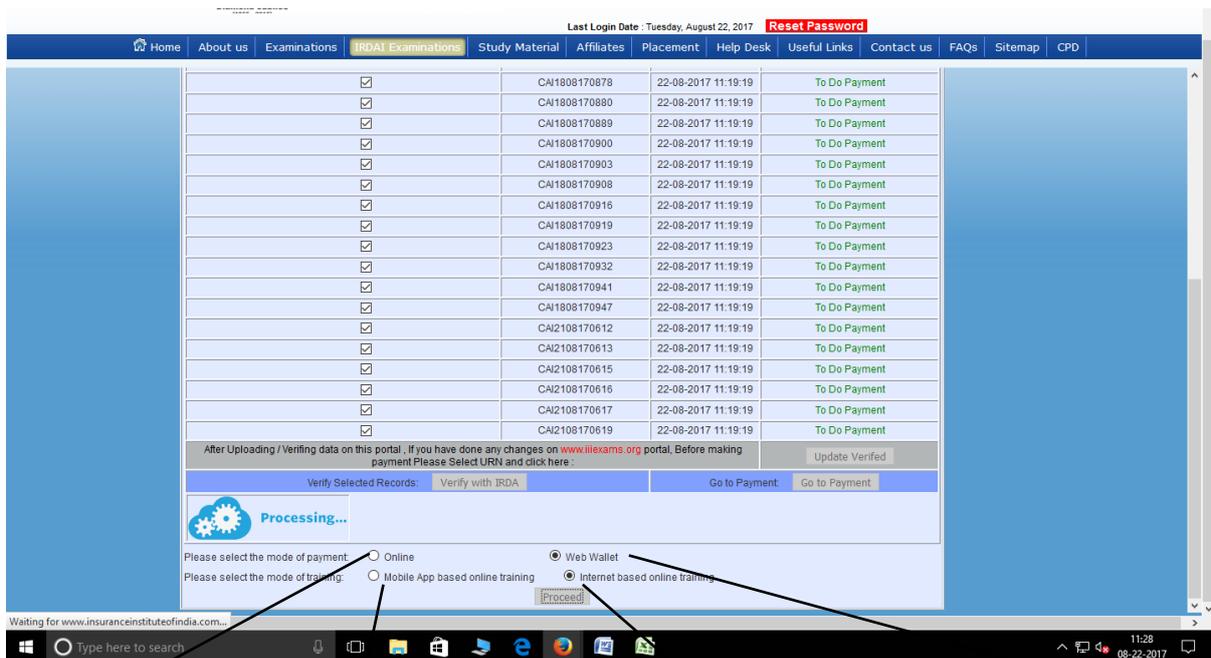
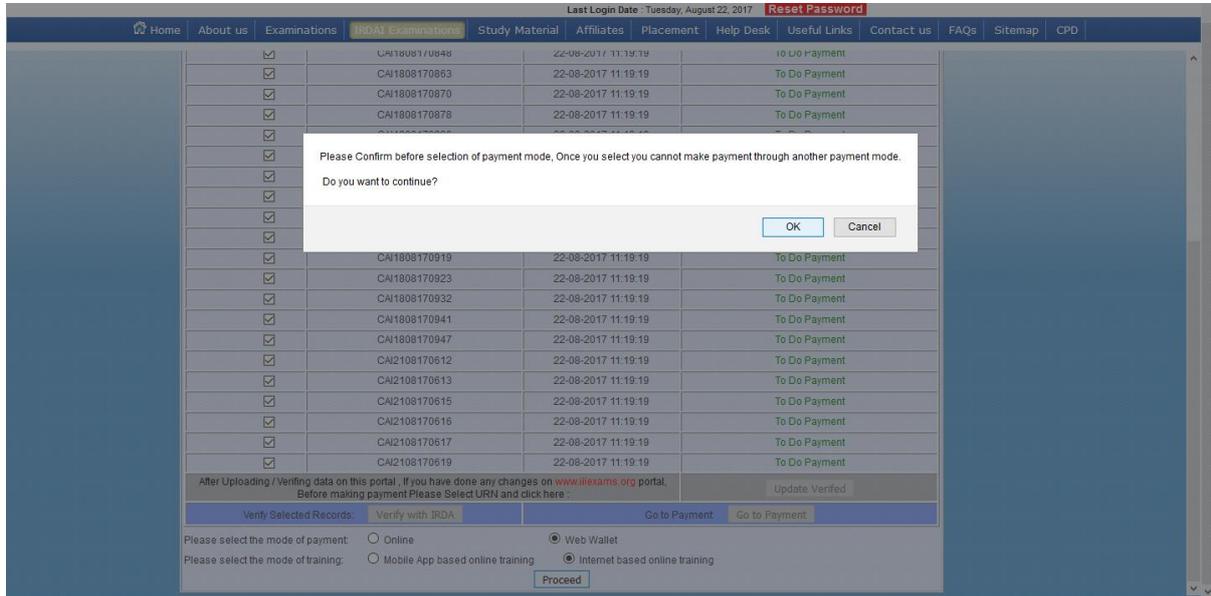
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The screen will appear as per follows:



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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

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The screenshot shows a web browser window with the URL <https://www.insuranceinstituteofindia.com/web/guest/bulk-file-upload1>. The page header includes the Insurance Institute of India logo and name in Hindi and English, along with a navigation menu. The main content area displays a 'Corporate Wise Payment Confirmation For Web Wallet' form.

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