

Online Payment Help Manual for Corporate Agent

Following are the steps to make the payment towards the online training by Online Payment for Corporate Agent

Step 01: Corporate Agent 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/corporate-profile-creation1>)

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.

Corporate Agent 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 . 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.

<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 entry, followed by 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



Please enter your Corporate Agent Login details of www.insuranceinstituteofindia.com portal.

The screenshot shows the 'Enter your Login Name and Password' form. It has a light blue background and a white form box. The form contains the following fields and buttons:

- Login Name:**
- Password:**
- Buttons:** LOGIN, CLEAR
- Links:**
 - [Forgot Password](#)
 - [Reset Password New](#)
 - [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.

The screenshot shows the Insurance Institute of India website. The 'Corporate Agents' menu is expanded, and the 'Bulk File Upload' option is highlighted. A callout box with an arrow pointing to this option contains the text: "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 a Microsoft Excel spreadsheet with a list of URNs in the first column (A1 to A27). A 'Save As' dialog box is open, showing the file name 'URNs.xls' and the save type 'Excel 97-2003 Workbook'. The dialog box is positioned over the spreadsheet, and the 'Save' button is visible.

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

The screenshot shows the Insurance Institute of India website. The 'Corporate Agent Corporate Wise URN Upload' form is displayed. The 'File' field contains the text 'URNs_20.xls' and the 'Upload' button is visible.

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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 Dates' button. Below that, there are fields for 'From Date' (22-08-2017) and 'To Date' (22-08-2017). 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 menu is open, showing options for 'Yes' and 'No'. A warning message states: "Once you select TDS [Yes/No] cannot change afterwards." Below this, a table lists the uploaded URNs and their statuses.

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"/>	CA1808170807	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170834	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170841	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170844	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170848	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170863	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170870	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170878	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170880	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170889	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170900	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170903	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170908	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170916	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170919	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CA1808170923	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<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 'Corporate Agent Corporate Wise URN Uploaded Details' page, but with a confirmation dialog box overlaid. The dialog box contains 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." There are 'OK' and 'Cancel' buttons at the bottom of the dialog.

Below the dialog box, the table of URNs is visible, showing the same data as in the previous screenshot. 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' form. The 'From Date' and 'To Date' are both set to '22-08-2017'. The 'Status' is set to 'To Be Verified'. A search button is present. Below the form, a message 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:

The screenshot shows the 'Corporate Agent Corporate Wise URN Uploaded Details' form with the 'Status' dropdown menu open. The dropdown menu is expanded, showing 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 'To Do Payment' option is highlighted in blue.

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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' link. 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

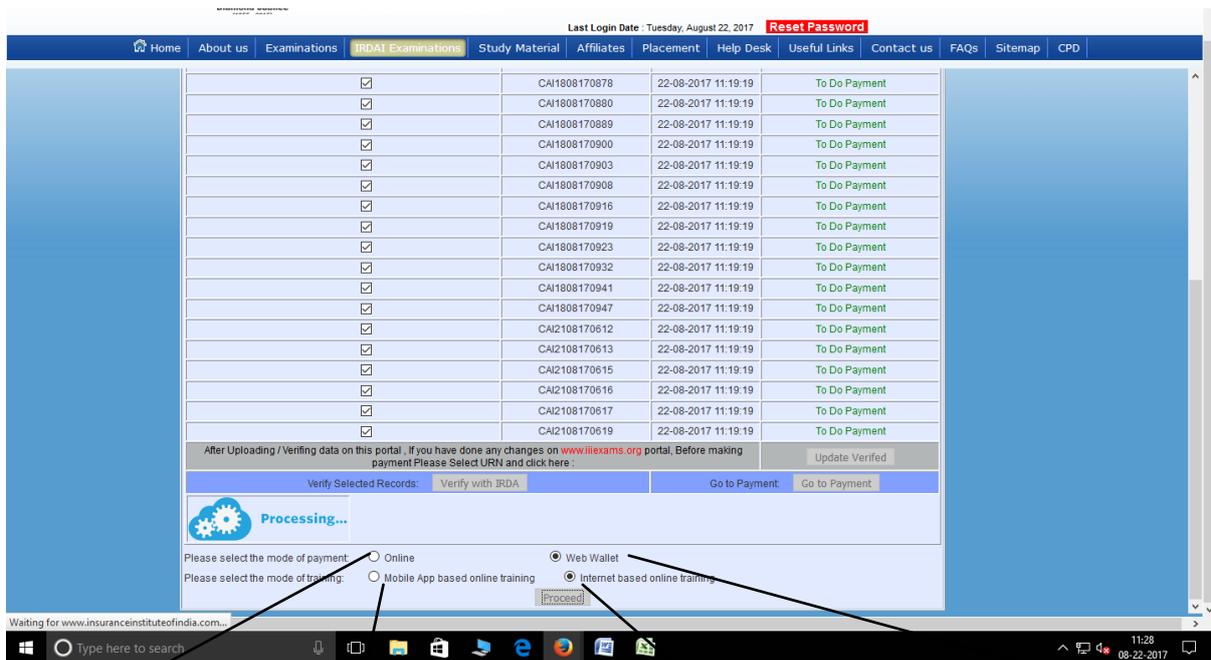
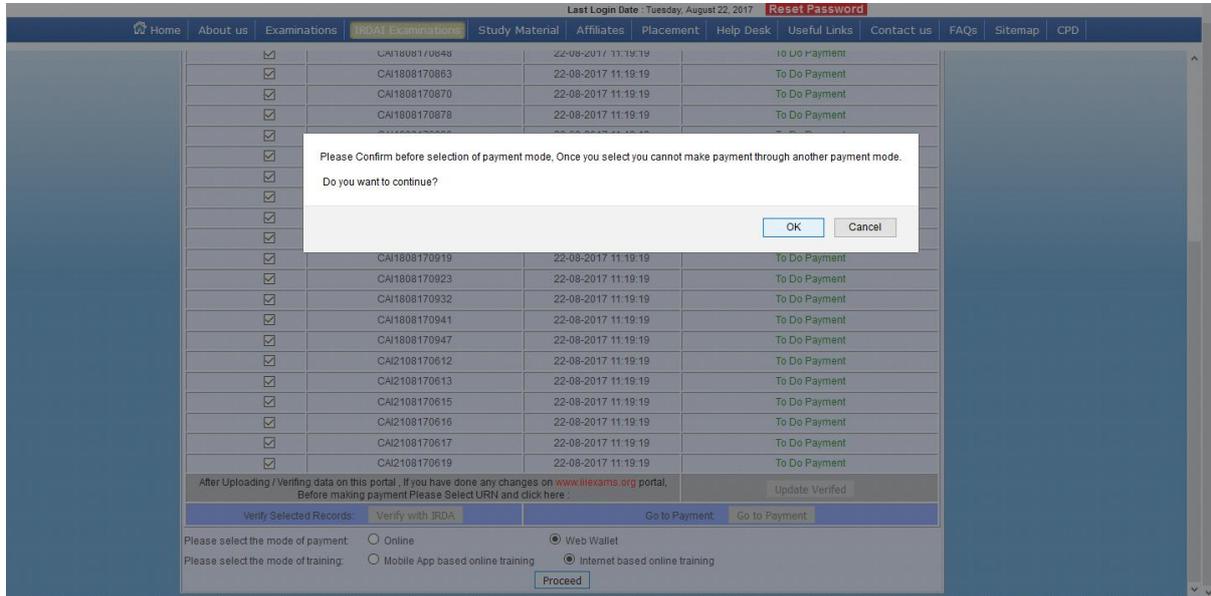
The screenshot shows the same page as above, but with a 'Go to Payment' button highlighted by an arrow. The table data is as follows:

Select All	URN	Uploaded Date	Status
<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
<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"/>	CA12108170612	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA12108170613	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA12108170615	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA12108170616	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA12108170617	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA12108170619	22-08-2017 11:19:19	To Do Payment

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'. An arrow points to the 'Go to Payment' button with 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

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Home - Insurance Institute of India | Bulk File Upload - Insurance Institute of India

https://www.insuranceinstituteofindia.com/web/guest/bulk-file-upload1

भारतीय बीमा संस्थान
INSURANCE INSTITUTE OF INDIA

Last Login Date : Tuesday, August 22, 2017 [Reset Password](#)

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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

Yes | No

Type here to search | 11:28 | 08-22-2017