Web-Wallet Help Manual for Corporate Agent/Web Aggregator/ Insurance Marketing Firm/Insurance Brokers (Authorised Verifier)

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

Step 01: Company 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.

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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.

Step 07: 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 08: 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. 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

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mobile in offline mode, the system can update training hours which are completed by the candidate either on PC/Laptop and on Mobile App.

Company 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
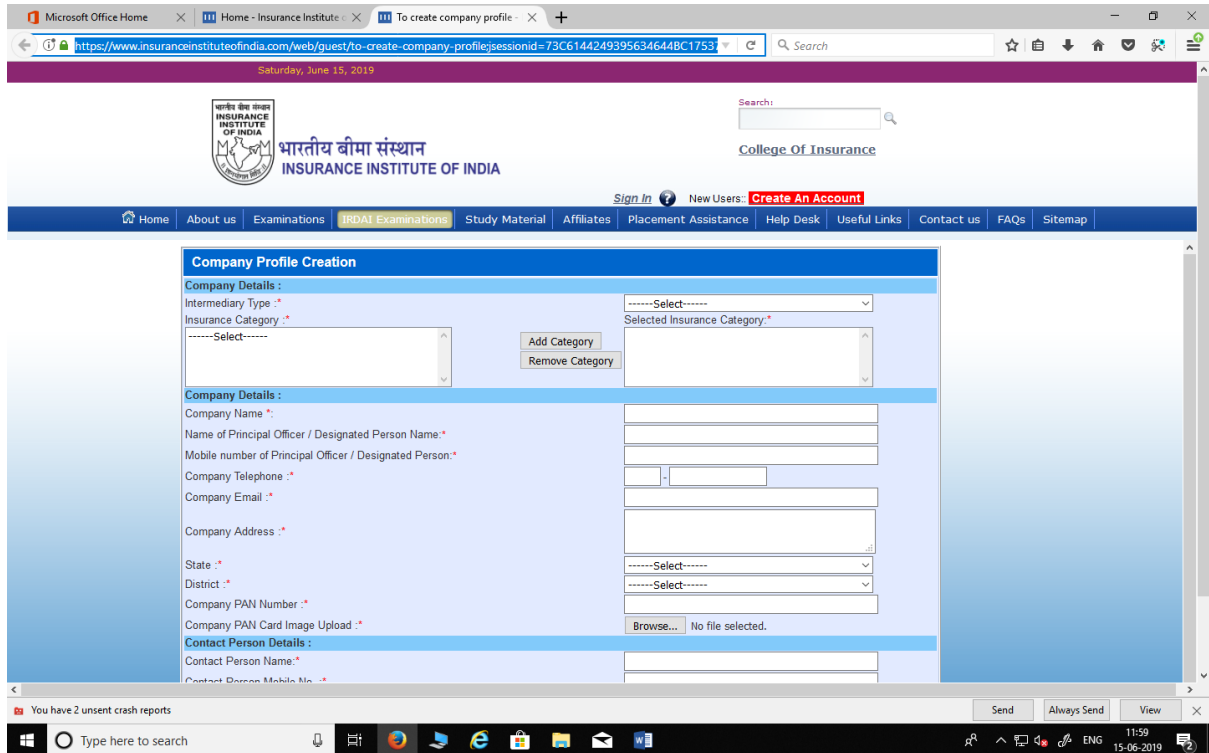
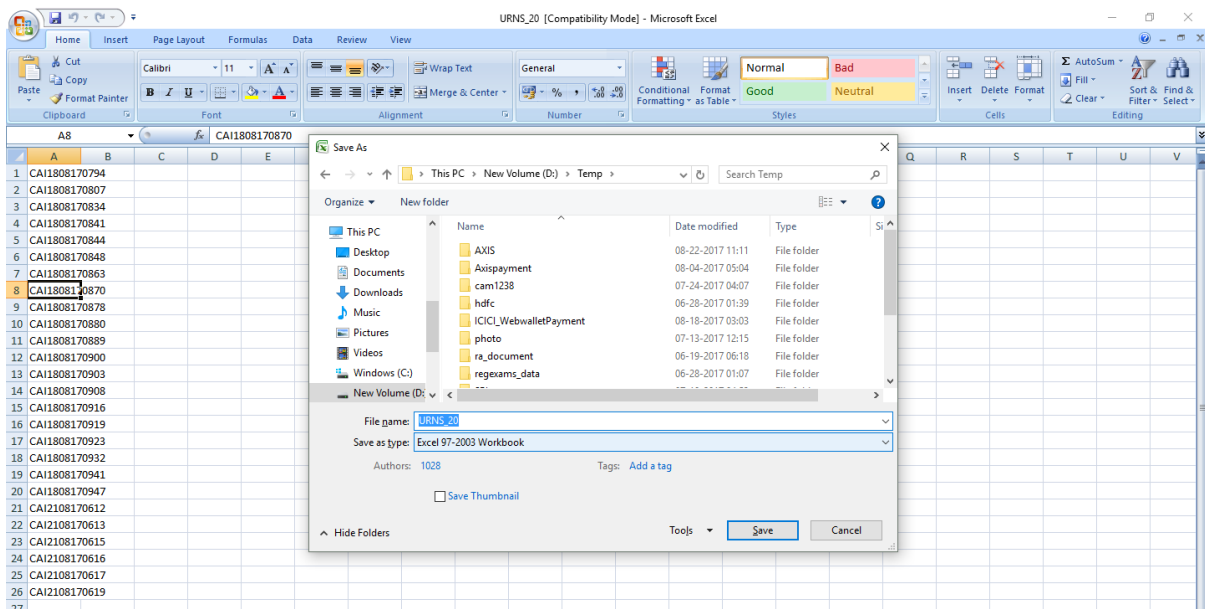Please visit to insuranceinstituteofindia.com

Please click on "Sign In"

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Please enter your **Company**Login details of www.insuranceinstuteofindia.com portal.
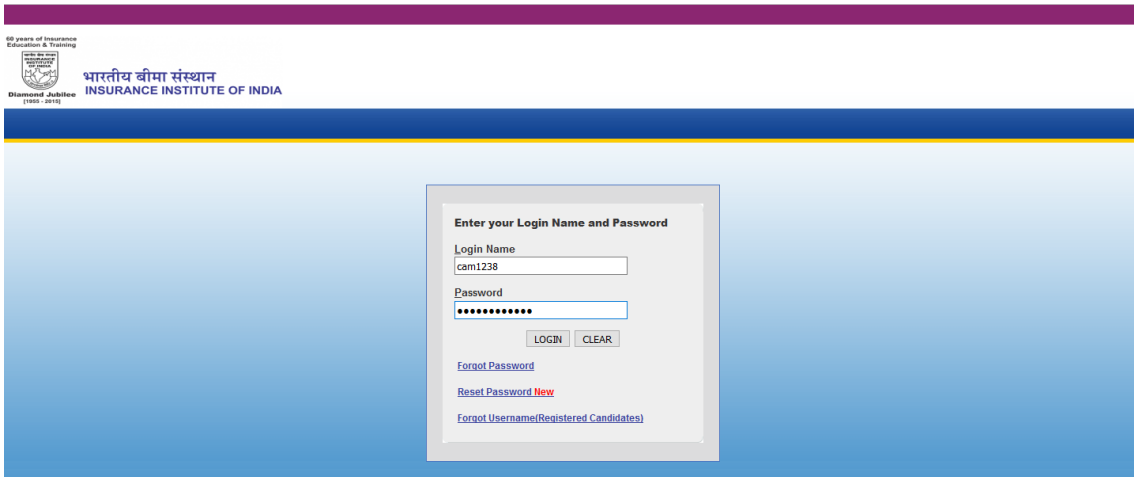
Please click on Create Web Wallet
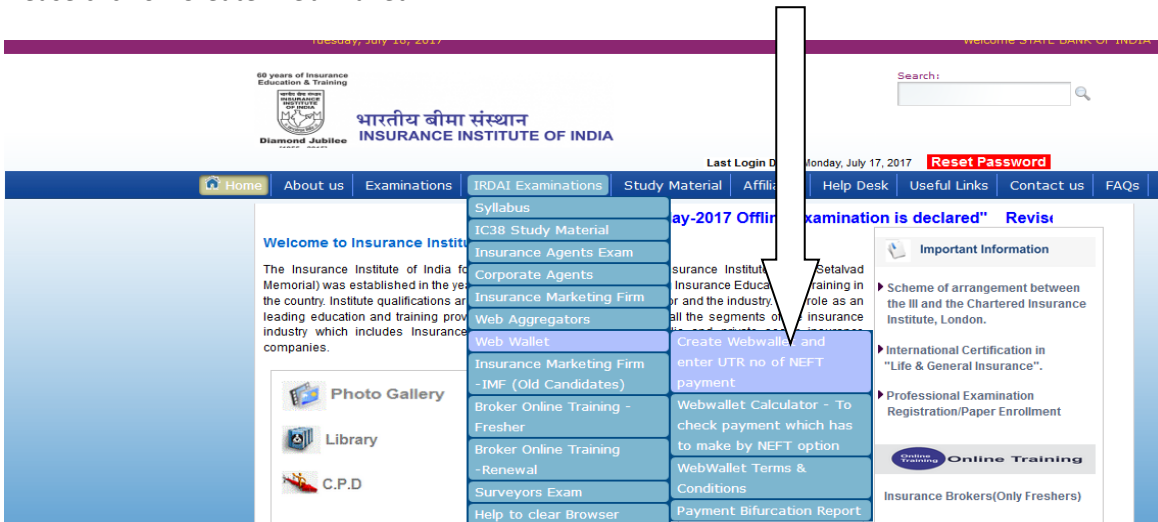
Following Screen will appeared and click on *Yes*

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/-.

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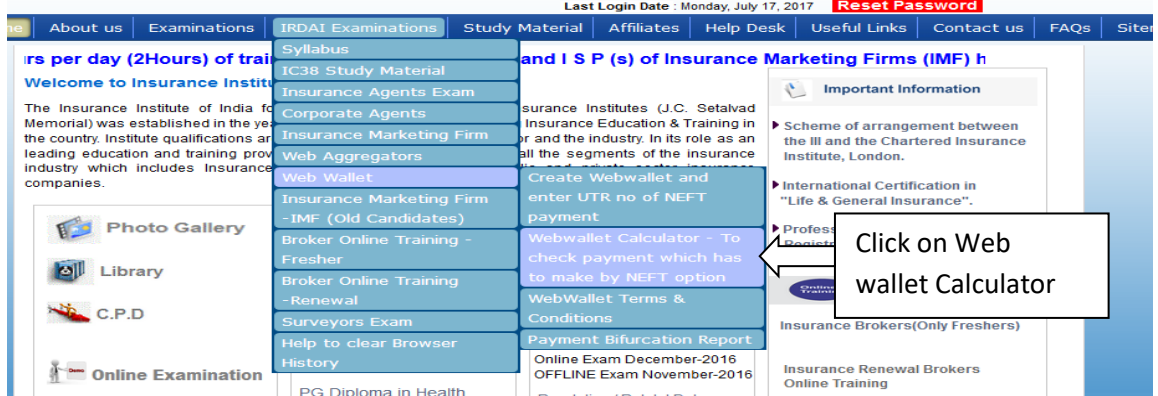
After Enter *Advance Amount* then click on *Calculate Deposit Amount to check exactly what is NET amount you have to pay to us.*

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

This is the Net Amount which you have to pay by NEFT
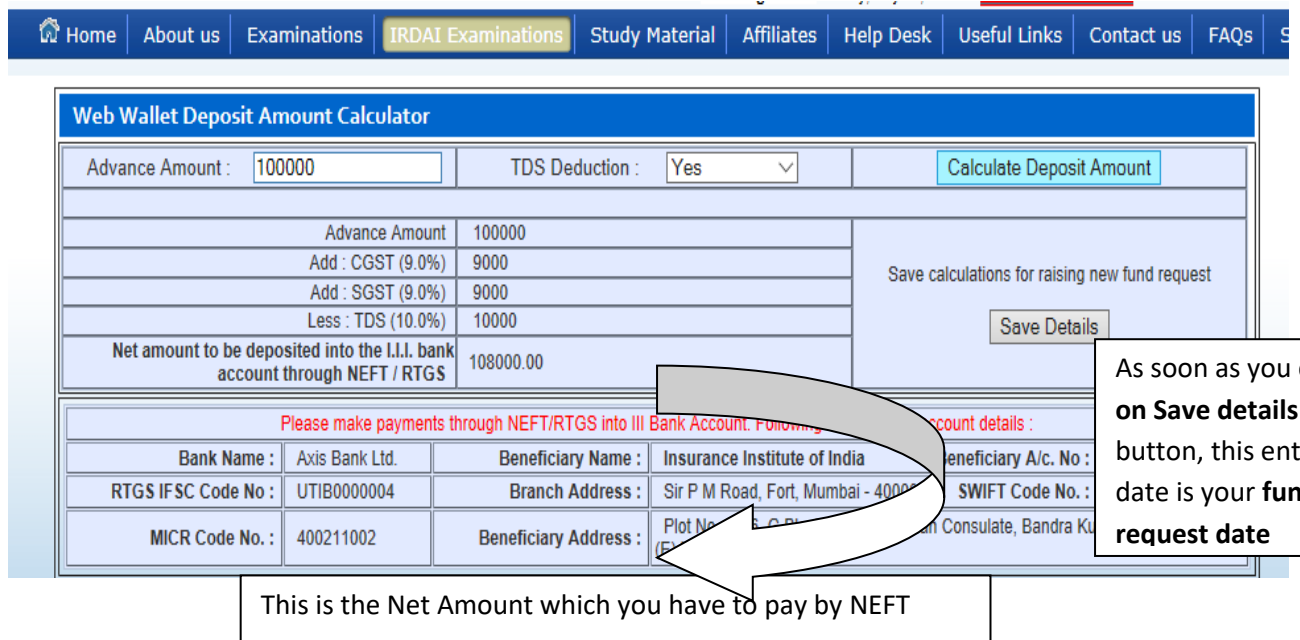
If you have finalized the amount, then click on *Save Details* button*. Screen will show you following message.
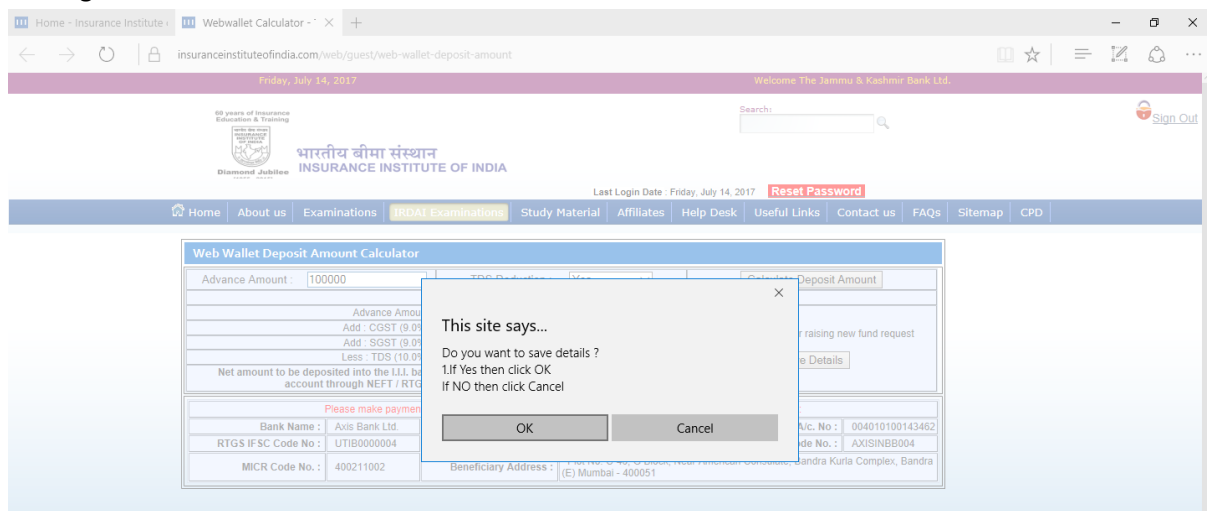
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To enter the UTR No of NEFT payment done by you, Go to IRDAI Examinations—Web Wallet—"Create Web wallet/**enter UTR no of NEFT payment**"

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*

Screen shows as follows:-

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

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

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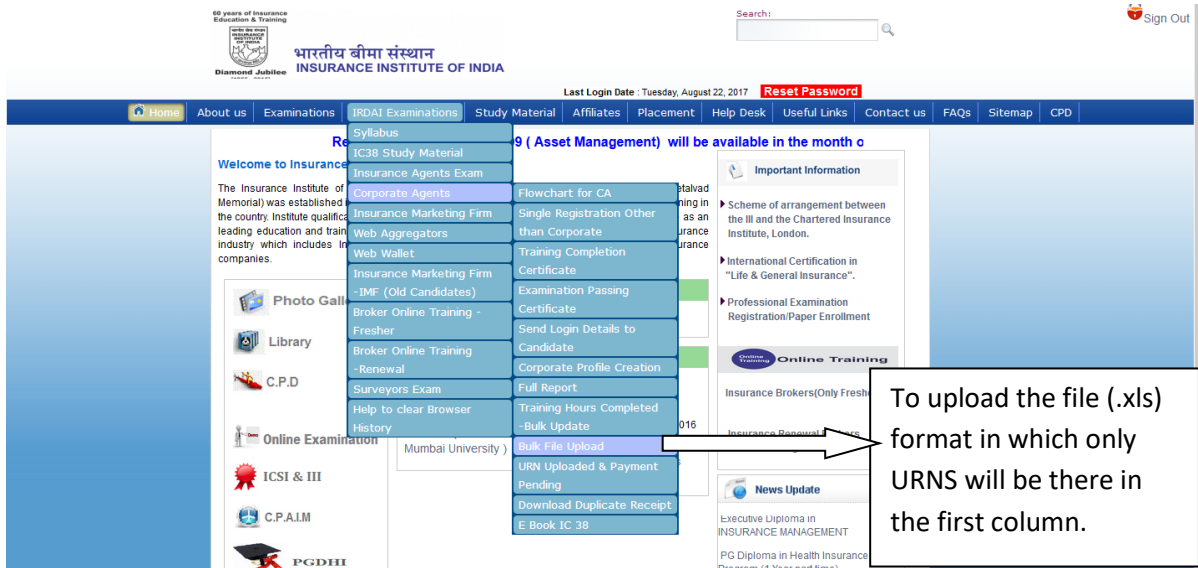
2) Please copy URNs in first column and save the file with .xls extension (Excel 97-2003 Workbook)

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.

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.

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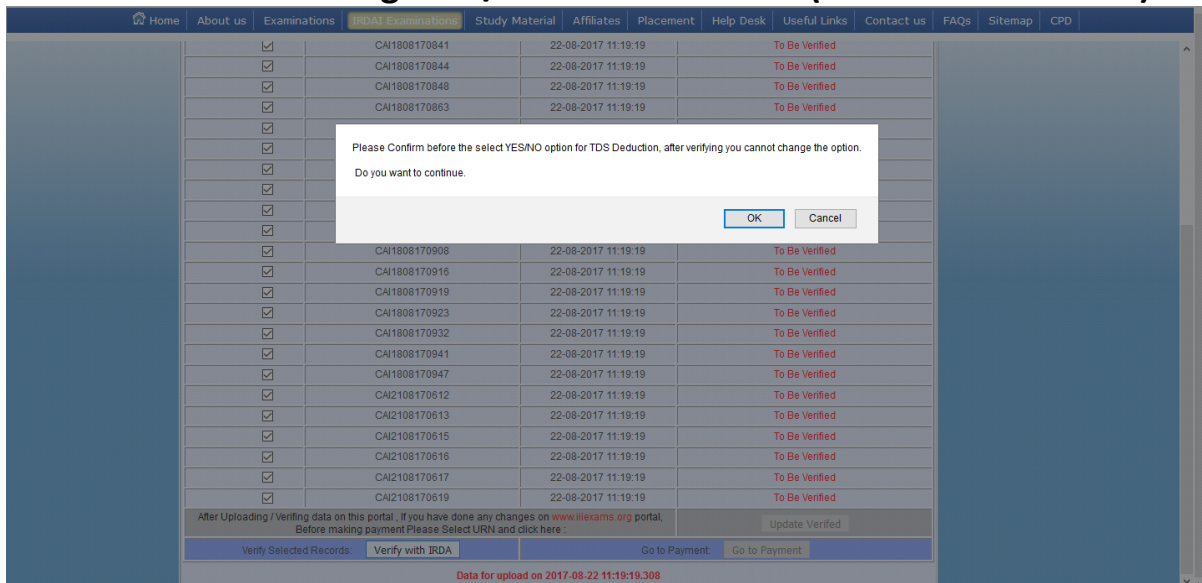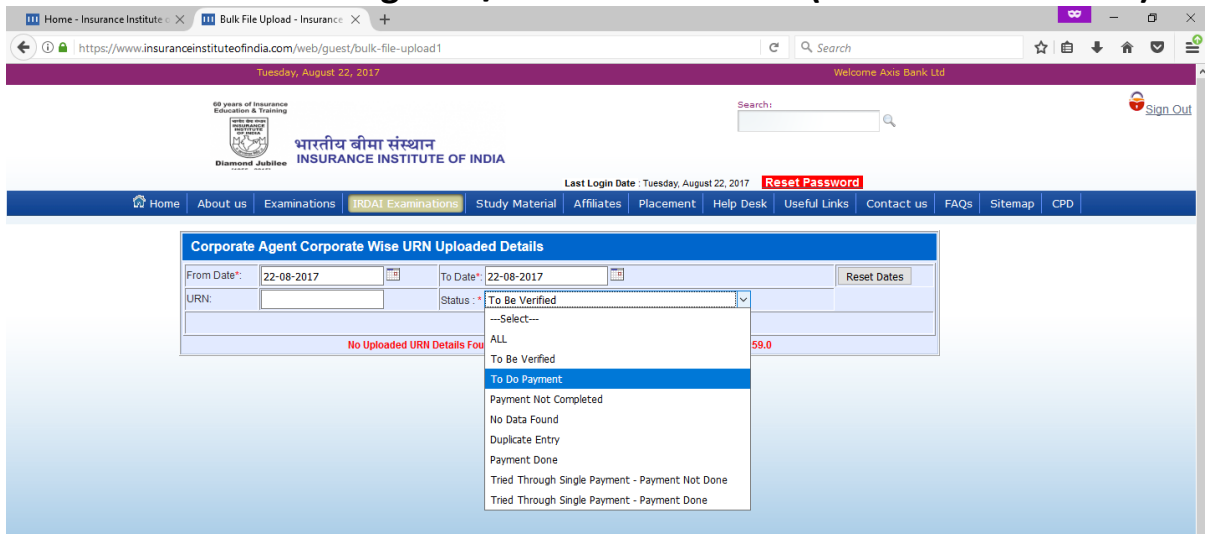

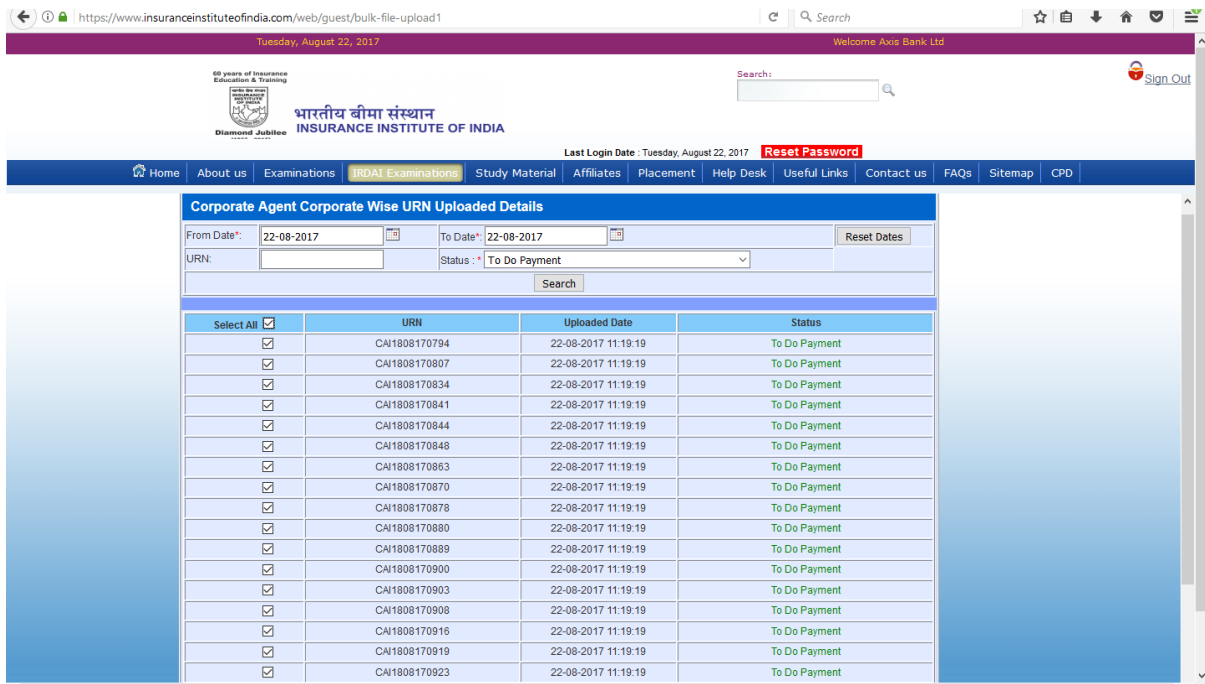After verification, the system will show you following screen.
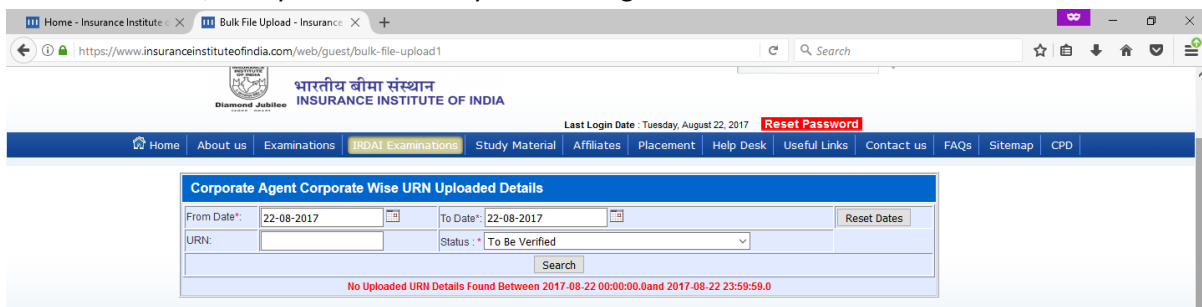
Please select "To Do Payment" Filter as follows:

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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.

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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