

Brokers Bulk Registration

This facility provided to register brokers candidate in bulk. For availing this facility company should create their profile on <https://www.insuranceinstituteofindia.com>

Company can enrol their candidates for two Certificate of Registration and five Insurance Category

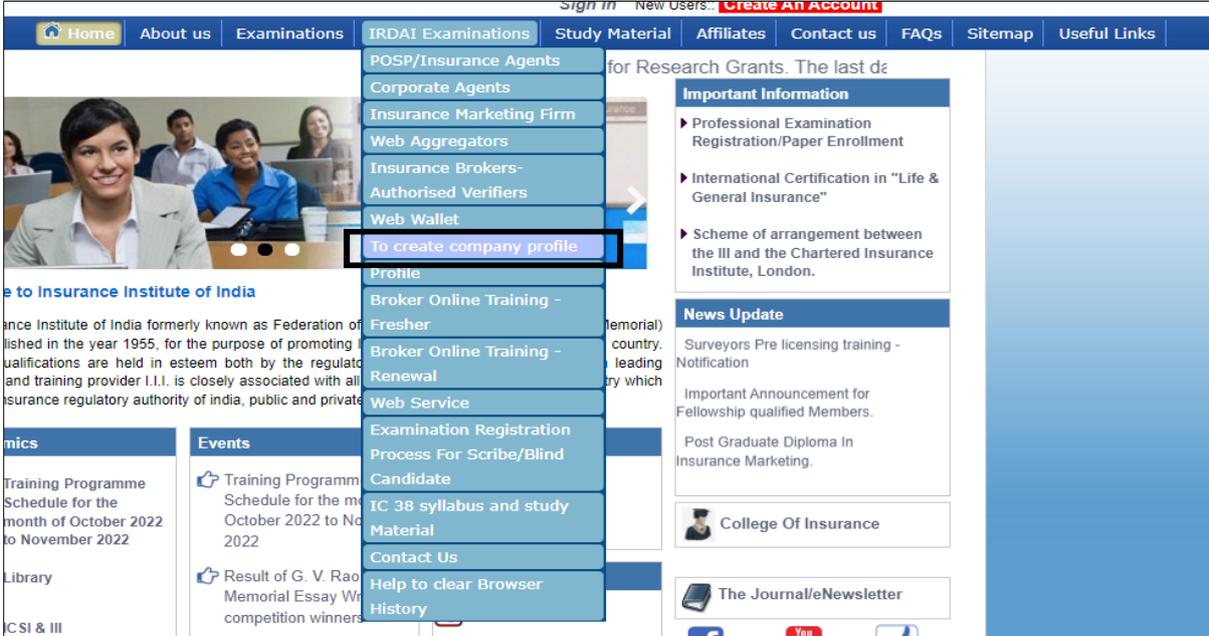
Certificate of Registration	Insurance Category
1. Principal Officer	1. Direct Life Broker
2. Broker Qualified Person	2. Direct General Broker
	3. Direct Life and General Broker
	4. Composite Broker
	5. Reinsurance Broker

Process for Bulk registration of Brokers.

1. Company Creation
2. Updation of GSTIN Number
3. Downloading format
4. Preparing excel files and folders of signature and photos
5. Uploading files as per format
6. Generation of Profile ID
7. Payment of bulk registration

Step 1: Company Creation

Visit Site :<https://www.insuranceinstituteofindia.com/web/guest/home>. Create you company profile through - **To create company profile.**



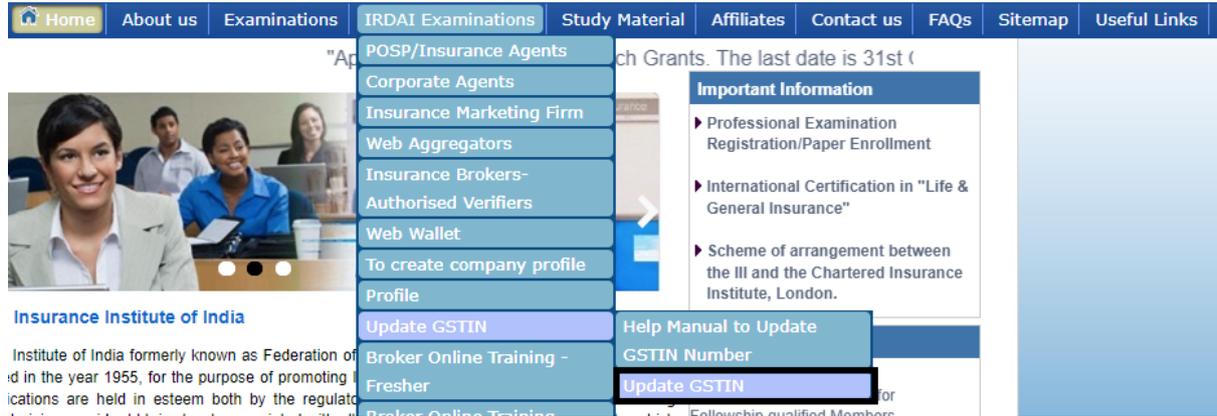
The screenshot shows the website's navigation menu with the following items: Home, About us, Examinations, IRDAI Examinations, Study Material, Affiliates, Contact us, FAQs, Sitemap, and Useful Links. A dropdown menu is open under 'IRDAI Examinations', listing: POSP/Insurance Agents, Corporate Agents, Insurance Marketing Firm, Web Aggregators, Insurance Brokers-Authorised Verifiers, Web Wallet, To create company profile (highlighted), Profile, Broker Online Training - Fresher, Broker Online Training - Renewal, Web Service, Examination Registration, Process For Scribe/Blind Candidate, IC 38 syllabus and study Material, Contact Us, Help to clear Browser History, and Memorial). The main content area includes 'Important Information' with links to 'Professional Examination Registration/Paper Enrollment', 'International Certification in "Life & General Insurance"', and 'Scheme of arrangement between the I.I.I. and the Chartered Insurance Institute, London.' There is also a 'News Update' section with 'Surveyors Pre licensing training - Notification' and 'Important Announcement for Fellowship qualified Members.' The footer contains 'College Of Insurance' and 'The Journal/eNewsletter'.

After creating profile company will get log in id and password of <https://www.insuranceinstituteofindia.com>.

Brokers Bulk Registration

Step 2 : Updation of GSTIN number :

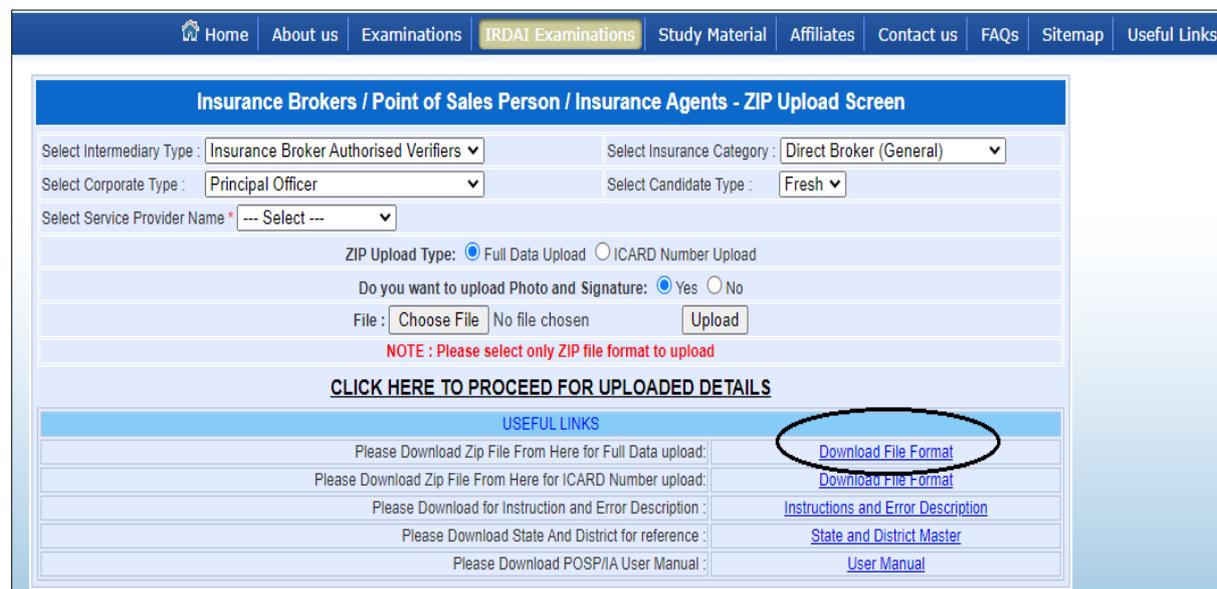
Sign in through company's login id and password.



Update company's gstin number with the above option. If your company doesn't come under GSTIN update as No.

Step 3 : Downloading format

Kindly download format for uploading the data on portal. Kindly click on the To download and upload Zip format.



Brokers Bulk Registration

Step 4: Preparing excel files and folders of signature and photos

Instructions to prepare excel

- Excel sheet name should be **Sheet1**

Name Initial	Candidate Full Name	Current House Number	Current Street	Current Town	Current District	Current State
MR.	ABC	1	LBS MARG	VIKROLI WES	Mumbai City	Maharashtra

Sheet1

Excel file name should be **FullDataUpload** and Sheet save in Microsoft Excel 97-2003 Worksheet

Name	Date modified	Type	Size
Photo	20-06-2022 13:08	File folder	
Signature	20-06-2022 13:08	File folder	
FullDataUpload	27-06-2022 12:02	Microsoft Excel 97...	92 KB

- There should not be any special characters in the Candidate's name.
- In the field "Area", there should be either **URBAN** or **RURAL** only.
- Date of Birth - **DD-MMM-YYYY** format only

Date of Birth(DD-MMM-YYYY)	Area
20-Jul-1997	M

Format: MM/DD/YYYY
Required: Yes
Description:

- The Mobile number should be **10 digits only**. No prefixed or any other STD code should be included.
- The Candidate's Email id and Contact person's Email Id **should not be same**.
- Every candidate will have a different email id.
- For Photo File Name **column** write **Photo** and for Signature File Name **column** write Signature inside excel file for all entries

Photo File Name	Signature File Name
Photo	Signature

Brokers Bulk Registration

9. Training and Examination language should be written in **CAPITAL** letters only.

Training Language	Exam Language
ENGLISH	ENGLISH

10. Along with the excel, prepare 2 separate folders for Photo and Signature.
Folder name should be Photo and Signature.

Name	Date modified	Type	Size
Photo	17-12-2021 12:06	File folder	
Signature	17-12-2021 12:06	File folder	

11. Photo and signature is not mandatory. If you are uploading the Candidate's photo and signature then it will be saved in the name of their **PAN number** in both folders.
12. If you are not attaching photo and signature then also create 2 folder with name Photo" and "Signature and keep it empty
13. Make a zip of Photo folder , Signature Folder & Excel file and upload it
- 1) excel file- FullDataUpload
 - 2) Photo folder
 - 3) Signature folder

Name	Date modified	Type	Size
Photo	20-06-2022 13:08	File folder	
Signature	20-06-2022 13:08	File folder	
FullDataUpload	27-06-2022 12:02	Microsoft Excel 97...	92 KB
POSP FORMAT	20-07-2022 11:07	WinRAR ZIP archive	16 KB

Step 5: Uploading files as per format

Please select the below option to upload the data on the portal.

The screenshot shows the IRDAI portal navigation menu. The 'To download and upload zip file format' option is circled in red. The menu includes various options such as 'Bulk Registration', 'Online Registration for Web+Mobile App', 'Help Manual', 'Insurance Agents Examination Portal', 'List of Service Provider', 'Model Question Bank', 'Report of Insurance Agents', 'Bulk TCC Download for admin and corporate', 'To Search ICard by Bulk', 'To Search ICard for Single Candidate', and 'To push EMAIL/SMS'.

Brokers Bulk Registration

Below screen will appear. Please select option as per your company requirement.

Insurance Brokers / Point of Sales Person / Insurance Agents - ZIP Upload Screen

Select Intermediary Type : Insurance Brokers Select Insurance Category : Direct Broker (Life and General)

Select Corporate Type : Broker Qualified Person Select Candidate Type : Fresh

Select Service Provider Name * Training Platform01

ZIP Upload Type: Full Data Upload ICARD Number Upload

Do you want to upload Photo and Signature: Yes No

File : Choose File No file chosen Upload

NOTE : Please select only ZIP file format to upload

CLICK HERE TO PROCEED FOR UPLOADED DETAILS

USEFUL LINKS

After selecting zip file, File name will display on portal.

Insurance Brokers / Point of Sales Person / Insurance Agents - ZIP Upload Screen

Select Intermediary Type : Insurance Brokers Select Insurance Category : Direct Broker (Life and General)

Select Corporate Type : Broker Qualified Person Select Candidate Type : Fresh

Select Service Provider Name * Training Platform01

ZIP Upload Type: Full Data Upload ICARD Number Upload

Do you want to upload Photo and Signature: Yes No

File : Choose File III -18.10.22.zip Upload

NOTE : Please select only ZIP file format to upload

CLICK HERE TO PROCEED FOR UPLOADED DETAILS

After file uploaded successfully it will show below message on the screen

Insurance Brokers / Point of Sales Person / Insurance Agents - ZIP Upload Screen

Select Intermediary Type : Insurance Brokers Select Insurance Category : Direct Broker (Life and General)

Select Corporate Type : Broker Qualified Person Select Candidate Type : Fresh

Select Service Provider Name * --- Select ---

ZIP Upload Type: Full Data Upload ICARD Number Upload

Do you want to upload Photo and Signature: Yes No

File : Choose File No file chosen Upload

NOTE : Please select only ZIP file format to upload

FILE UPLOAD DESCRIPTION : Total 2 Records Uploaded Successfully on 2022-09-28 12:17:45.766

CLICK HERE TO PROCEED FOR UPLOADED DETAILS

USEFUL LINKS

Please Download Zip File From Here for Full Data upload:	Download File Format
Please Download Zip File From Here for ICARD Number upload:	Download File Format
Please Download for Instruction and Error Description :	Instructions and Error Description
Please Download State And District for reference :	State and District Master
Please Download POSP/IA User Manual :	User Manual

Insurance Brokers / Point of Sales Person / Insurance Agents - Profile Id Search Upload Data

TYPE OF DATA:	Select Data from Uploaded and Existing Data	For Profile ID Generation Use "All New Data"	
Uploaded on Date: 28-09-2022	Uploaded to Date: 28-09-2022	Status: All	
PAN Number: <input type="text"/>	Mobile Number: <input type="text"/>	Email ID: <input type="text"/>	
Profile Id: <input type="text"/>	Training Language: ENGLISH	Name: <input type="text"/>	
Intermediary Type: Insurance Brokers	Insurance Category: Direct Broker (Life and General)	Corporate Type: Broker Qualified Person	
	Candidate Type: Fresh		

PROCEED WITH INFORMATION PROVIDED IN EXCEL Use Uploaded Information for All Candidates
 PROCEED WITH INFORMATION PRESENT IN SYSTEM Use Existing Information for All Candidates
 CUSTOM SELECTION: Select on your Own

Proceed with Selected Information

Select	S.No.	ICARD Number	Profile Id	Existing/New	Pan No.	Applicant Name	Mobile No	Candidate Email ID	Training Language	Default Option	Photo	Sign	Registered Company	Uploaded Date	Data Validity
	1	--	--	Fresh					ENGLISH	Yes				2022-09-28 00:17:45.0	No Error Found
	2	--	--	Fresh					ENGLISH	Yes				2022-09-28 00:17:45.0	No Error Found

Proceed with Selected Information

Brokers Bulk Registration

Then click on proceed for the uploaded details the uploaded records will display on portal.

ZIP Upload Type: Full Data Upload ICARD Number Upload

Do you want to upload Photo and Signature: Yes No

File : No file chosen

NOTE : Please select only ZIP file format to upload

[CLICK HERE TO PROCEED FOR UPLOADED DETAILS](#)

USEFUL LINKS

Step 6 :Generation of Profile ID

Select the option to search the upload data

IRDAI Examinations	Study Material	Affiliates	Contact us	FAQs	Sitemap	Useful Lin
POSP/Insurance Agents	Bulk Registration					Help Manual for POSP/Insurance Agents
Corporate Agents	Online Registration for					To download and upload zip file format
Insurance Marketing Firm	Web+Mobile App					To Search and update uploaded data of the candidates
Web Aggregators	Help Manual					To make the payment for Training in Bulk
Insurance Brokers- Authorised Verifiers	Insurance Agents Examination Portal					Bulk TCC Download for admin and corporate
Web Wallet	List of Service Provider					To Search ICard by Bulk
To create company profile	Model Question Bank					To Search ICard for Single Candidate
Profile	Report of Insurance Agents					To push EMAIL/SMS
Update GSTIN						
Broker Online Training - Fresher	News Update					
Broker Online Training - Renewal						
Web Service						

Below screen will appear, select below option to generate profile id

TYPE OF DATA: All New Data for Profile Id generation For Profile ID Generation Use "All New Data"

Uploaded from Date: View Complete Excel Uploaded and Existing Data Status:

PAN Number : Select Data from Uploaded and Existing Data Email ID :

Profile Id : All New Data for Profile Id generation Name :

Intermediary Type: Training Language : Corporate Type:

Insurance Category :

Candidate Type :

To Generate Profile Ids For Selected Records:

Delete Profile Ids For Selected Records:

Click on go to the payment

Delete Profile Ids For Selected Records:

GO TO PAYMENT SCREEN

ICARD Number	Profile Id	Existing/New	Pan No.	Applicant Name	Mobile No	Candidate Email ID	Training Language	Default Option	Photo	Sign	Registered Company	Uploaded Date	Data Validity	Remark
A00593059	A00593059IB4791DBLGBCP	Fresh					ENGLISH	Yes	<input type="text"/>	<input type="text"/>		2022-09-28 00:17:45.0		Profile ID Generated
A00593060	A00593060IB4791DBLGBCP	Fresh					ENGLISH	Yes	<input type="text"/>	<input type="text"/>		2022-09-28 00:17:45.0		Profile ID Generated

Brokers Bulk Registration

Step 7 : Payment of bulk registration

Select option and click on search and pay the fees

Insurance Brokers / Point of Sales Person / Insurance Agents - Payment for Profile Ids

Uploaded From Date*: 28-09-2022 Uploaded To Date*: 28-09-2022

Profile ID: Status: To Do Payment

Select Intermediary Type : Insurance Brokers Select Insurance Category : Direct Broker (Life and General)

Select Corporate Type : Broker Qualified Person Select Training Language : ENGLISH

Select Candidate Type : Fresh

No Profile ID Uploaded Details Found Between 2022-09-28 00:00:00.0and 2022-09-28 23:59:59.0

Candidate data will display on the screen. Select the records for you want to pay the fees.

Insurance Brokers / Point of Sales Person / Insurance Agents - Payment for Profile Ids

Uploaded From Date*: 28-09-2022 Uploaded To Date*: 28-09-2022

Profile ID: Status: To Do Payment

Select Intermediary Type : Insurance Brokers Select Insurance Category : Direct Broker (Life and General)

Select Corporate Type : Broker Qualified Person Select Training Language : ENGLISH

Select Candidate Type : Fresh

Select All	Sr. No.	ICARD Number	Profile Id	Applicant Name	PAN No	Mobile No	Email ID	Internal reference number	Contact person Email id	Training Language	Status
<input checked="" type="checkbox"/>	1	A00593059	A00593059IB4791DBLGBQP					2441		ENGLISH	To Do Payment
<input checked="" type="checkbox"/>	2	A00593060	A00593060IB4791DBLGBQP					2441		ENGLISH	To Do Payment

Go to Payment:

Select Service Provider Name *

Select payment type GSTIN number and click on proceed

Insurance Brokers / Point of Sales Person / Insurance Agents - Payment for Profile Ids

Uploaded From Date*: 28-09-2022 Uploaded To Date*: 28-09-2022

Profile ID: Status: To Do Payment

Select Intermediary Type : Insurance Brokers Select Insurance Category : Direct Broker (Life and General)

Select Corporate Type : Broker Qualified Person Select Training Language : ENGLISH

Select Candidate Type : Fresh

Select All	Sr. No.	ICARD Number	Profile Id	Applicant Name	PAN No	Mobile No	Email ID	Internal reference number	Contact person Email id	Training Language	Status
<input checked="" type="checkbox"/>	1	A00593059	A00593059IB4791DBLGBQP					2441		ENGLISH	To Do Payment
<input checked="" type="checkbox"/>	2	A00593060	A00593060IB4791DBLGBQP					2441		ENGLISH	To Do Payment

Go to Payment:

Payment Type : Training Only Online Web Wallet

Please select the mode of payment: Online Web Wallet

Select Service Provider Name *

GSTIN State * :

GSTIN No.:

[Link to add GSTIN](#)