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

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.

			Sign	In New C	Jsers:: Create	An Account				-
🕅 Home Abou	t us Examinations	IRDAI Examinations	Study	Material	Affiliates	Contact us	FAQs	Sitemap	Useful Links	
		POSP/Insurance Ager	nts	for Res	earch Grants	s. The last da				
		Corporate Agents			Important Inf	formation				
		Insurance Marketing	Firm	arance	Professional Examination					
1 AF		Web Aggregators			Registration	/Paper Enrollme	ent			
		Insurance Brokers-			International	Certification in	"Life &			
		Authorised Verifiers			General Insu	irance"				
		Web Wallet			Scheme of a	rrangement bet	ween			
		To create company pr	ofile		the III and the Chartered Insurance					
o to Incurance Institut	to of India	Profile			Institute, Loi	ndon.				
e to insurance institu	le of india	Broker Online Training -		News Update						
ince Institute of India form	erly known as Federation of	Fresher	sher	lemorial)						
ualifications are held in e	r the purpose of promoting i steem both by the regulate	Broker Online Trainin		country.	Notification]-			
and training provider I.I.I. i	s closely associated with all	Renewal		try which						
surance regulatory authori	ty of india, public and private	Web Service			Fellowship gualified Members.					
mics	Events	Examination Registra	tion		Post Graduate	Diploma In				
inico	Lyong	Process For Scribe/Bl	ind		Insurance Mark	eting.				
Training Programme	C Training Programm	Candidate								
Schedule for the	October 2022 to No	IC 38 syllabus and st			Collors	061				
to November 2022	2022	Material			College	Or insurance				
	A Describert O M Desc	Contact Us								
Library	Library CP Result of G. V. Rao Memorial Essay W				/ The Jou	rnal/eNewslett	er			
	competition winners	History	огу		đ					
10.51 & 111	-					You				

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

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**.

Rome About us Examinations	IRDAI Examinations Study	Material Affiliates	Contact u	s FAQs	Sitemap	Useful Links
be closed from 30.09.2022 to 01.10.2022.	POSP/Insurance Agents	Bulk Registration	н	elp Manual		
	Corporate Agents	Online Registration	for P	OSP/Insura	ince Agents	
	Insurance Marketing Firm	Web+Mobile App		To download and upload zip		
	Web Aggregators	Help Manual	fi	e format		
	Insurance Brokers-	Insurance Agents	T	To Search and update		
	Authorised Verifiers	Examination Portal	u	uploaded data of the		
	Web Wallet	List of Service Provider		candidates		
	To create company profile	Model Question Bank		To make the payment for		
	Profile	Report of Insurance Agents		Training in Bulk		
ome to Insurance Institute of India	Update GSTIN		В	ulk TCC Do	wnload for	
surance Institute of India formerly known as Federation o	Broker Online Training -	lemorial) News Upd	ate a	dmin and c	orporate	
stablished in the year 1955, for the purpose of promoting	Fresher	country.	Т	o Search IC	Card by Bulk	
e qualifications are held in esteem both by the regulation and training provider [.].], is closely associated with all	Broker Online Training -	try which Fellowship qu	alified Memb	Search IC	Card for Sing	gle
s Insurance regulatory authority of india, public and privat	Renewal	Poet Gradus	C Diploma I	andidate		
	Web Service	Insurance Ma	rketing.	push EMA	AIL/SMS	
idemics Events			-			

🛱 Home About us Examinations IRDAI Examinat	ions Study Material	Affiliates	Contact us	FAQs	Sitemap	Useful Links
Insurance Brokers / Point of Sales Person / Insu	urance Agents - ZIP	Upload Sc	reen			
Select Intermediary Type : Insurance Broker Authorised Verifiers 🗸	Select Insurance Category	Direct Broke	er (General)	~		
Select Corporate Type : Principal Officer	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 Sign	nature: 💿 Yes 🔿 No					
File : Choose File No file chosen	Upload					
NOTE : Please select only ZIP file	format to upload					
CLICK HERE TO PROCEED FOR U	JPLOADED DETAILS					
USEFUL LINKS						
Please Download Zip File From Here for I	Full Data upload:	Downloa	ad File Format	2		
Please Download Zip File From Here for ICARD	Number upload:	Downloa	ad File Format			
Please Download for Instruction and E	rror Description :	Instructions a	nd Error Descrip	tion		
Please Download State And Distri	ict for reference :	State and	District Master			
Please Download POSP/	IA User Manual :	Use	er Manual			

Step 4:Preparing excel files and folders of signature and photos Instructions to prepare excel

1. Excel sheet name should be **Sheet1**

Name Initial	Candidate Full Name	Current House Number	Current Street	Current Town	Current District	Current State
MB.	ABC	1	LBS MARG	VIKHROLI VEST	Mumbai City	Maharashtra
	Sheet1	heet2 S	Sheet3	÷		
ADY	\sim					

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

Name	Date modified	Туре	Size
	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
\sim			

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

L	15	_	-		
	Date of Birth(DD- MMM-YYYY)	6	Format: Require Descript	MM/DD/YYYY d: Yes tion:	
-	20-Jul-1997	M			
L					

- 5. The Mobile number should be **10 digits only**. No prefixed or any other STD code should be included.
- 6. The Candidate's Email id and Contact person's Email Id should not be same.
- 7. Every candidate will have a different email id.
- 8. 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

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	Туре	Size	
	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	Туре	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.

	Edot Eogin Date : Hodin	coddy, copioniber 1					
Home About us Examinations	IRDAI Examinations	Study Material	Affiliates	Contact	us FAQs	Sitemap	Useful Links
be closed from 30.09.2022 to 01.10.2022.	POSP/Insurance Agents	Bulk Re	gistration		Help Manua	l for	
	Corporate Agents	Online I	Registration fo	r l	POSP/Insur	anco Agen<u>t</u>s	
	Insurance Marketing Fir	rm Web+M	lobile App	$- \Box$		d and upload	d zip
	Web Aggregators	Help Ma	anual		file format		
	Insurance Brokers-	Insuran			To Search a	nd update	
	Authorised Verifiers	Examin	Examination Portal		uploaded data of the		
	Web Wallet	List of 9	List of Service Provider		candidates		
	To create company prof	ile Model C	Model Question Bank		To make the payment for		or
	Profile	Report	Report of Insurance Agents		Training in Bulk		
ome to Insurance Institute of India	Update GSTIN			_	Bulk TCC D	ownload for	
surance Institute of India formerly known as Federation of	Broker Online Training -	lemorial)	News Update		admin and o	corporate	
stablished in the year 1955, for the purpose of promoting	Fresher	country.	Important Appo	Incomon	To Search I	Card by Bull	<
ion and training provider I.I.I. is closely associated with a	Broker Online Training -	ry which	Fellowship qualifi	ed Memb		Card for Sin	gle
es Insurance regulatory authority of india, public and priva	Renewal		Post Graduate [Diploma I	Candidate		
	Web Service		Insurance Market	ting.	To push EM	AIL/SMS	
Idemics Events							

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

Insurance Brokers / Point of Sales F	Person / Insurance Agents - ZIP Upload Screen
	Select Insurance Category : Direct Broker (Life and General)
Select Corporate Type : Broker Qualified Person V	Select Candidate Type : Fresh V
Select Service Provider Name * Training Platform01 🗸	
ZIP Upload Type: 🖲 Ful	I Data Upload OICARD Number Upload
Do you want to upload	I <u>Photo and</u> Signature:
File : Choose File IN	o file chosen Upload
NOTE : Please sel	ect only ZIP file format to upload
CLICK HERE TO PRO	CEED FOR UPLOADED DETAILS

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

Insurance Brokers / Point of Sales P	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 V	
ZIP Upload Type: 🔍 Full	Data Upload OICARD Number Upload
Do you want to uploan	Photo and Sygnature: 🔍 Yes 🔿 No
File : Choose File	-18.10.22.zip
NOTE : Please sele	ect omy ZIP file format to upload
CLICK HERE TO PRO	CEED 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 Up	load OICARD Number Upload									
Do you want to upload Photo and Signature: Yes 🔿 No										
File : Choose File No file ch	osen Upload									
NOTE : Please select only	NOTE : Please select only ZIP file format to upload									
FILE UPLOAD DESCRIPTION : Total 2 Records Up	loaded Successfully on 2022-09-28 12:17:45.766									
CLICK HERE TO PROCEED	FOR UPLOADED DETAILS									
USEFUL	LINKS									
Please Download Zip File From H	ere for Full Data upload: Download File Format									
Please Download Zip File From Here for	ICARD Number upload: Download File Format									
Please Download for Instructio	n and Error Description : Instructions and Error Description									
Please Download State A	nd District for reference : State and District Master									

					li	nsurance Broke	rs / Point	of Sales Person / Insu	rance Ag	ents - F	Profile Id S	Searc	h Upload	Data			
				TYF	PE OF DATA:		Sel	ect Data from Uploaded and	Existing Da	ta 🗸			- For Profile ID Generation Use "All New Data"				
		Uploade	ad from Date:		28-09-2022		Uploa	aded to Date:	28-09-20	22		e.	Status:		All	~	
		PAN Nu	mber :				Mobi	e Number :					Email ID :				
		Profile I	d :				Train	ing Language :	ENGLISH ¥		Name :						
		Interme	diary Type:		Insurance Bro	okers	✓ Insur	ance Category :	Direct Br	oker (Life	and Genera	al) 🗸	Corporate T	ype:	Broker Qualified Pe	rson 🗸	
	Intermediary Type:					Cand	idate Type :	Fresh 🗸									
	PROCEED WITH INFORMATION				Search Reset Data												
	PROCEED WITH INFORMATION PROVIDED IN EXCEL:		Ouse Uploaded Information for All Candidates		All PR	PROCEED WITH INFORMATION PRESENT IN SYSTEM:		O Use Existing Information for All Candidates		CUSTOM SELECTION:		Select on your	r Own				
								Proceed with Select	ted Informat	ion							
Select	S.No.	ICARD Number	Profile Id	Existing/New	Pan No.	Applicant Name	Mobile No	Candidate Email ID	Training Language	Default Option	Photo		Sign	Registere	d Company	Uploaded Dat	e 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 Select	ted Informat	ion							

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

ZIP Upload Type: O Full Data Upload O 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

Step 6 : Generation of Profile ID

Select the option to search the upload data

.	IRDAI Examinations Study	Material	Affiliates	Contac	t us	FAQs	Sitemap	Usef	ul Lin
en	POSP/Insurance Agents	Bulk Re	gistration		Help				
	Corporate Agents	Online F	Registration f	or	POS	P/Insura	ance Agents	:	
	Insurance Marketing Firm	Web+M	obile App		To download and upload zip				
-	Web Aggregators	Help Ma	inual		file f	format			
-	Insurance Brokers-	Insuran	ce Agents		To S	earch a	nd update		
-	Authorised Verifiers	Examin	ation Portal		uplo	aded da	ta of the		
	Web Wallet	List of S	Service Provid	ler	cand	didates			
	To create company profile	Model Q	uestion Bank	c	Топ	nake the	payment f	or	
	Profile	Report	of Insurance	Agents	Training in Bulk				
	Update GSTIN				Bulk	CTCC Do	wnload for		
of	Broker Online Training -	lemorial)	News Update	e	adm	in and c	orporate		
g I	- Fresher	country.	_		To S	earch IO	Card by Bull	k	
ato	Broker Online Training -	rv which			To S	earch IC	Card for Sin	gle	
ate	Renewal	,			Can	didate			
	Web Service				То р	ush EMA	AIL/SMS		

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

	TYPE OF DATA:		All New Data for Profile Io	d generation 🗸 🗸	← For Profile ID Gene	eration Use "All New Data"
Uploaded from Date:	28-09-2022		View Complete Excel Uplo	oaded and Existing Data	Status:	All 🗸
PAN Number :			All New Data for Profile Id	generation	Email ID :	
Profile Id :		•	Training Language :	ENGLISH ¥	Name :	
Intermediary Type:	Insurance Brokers	~	Insurance Category :	Direct Broker (Life and General) ✓	Corporate Type:	Broker Qualified Person ¥
			Candidate Type :	Fresh 🗸		
			Search	Reset Data		
		To G	enerate Profile Ids For Selecte	d Records: Generate Profile Ids	1	
		Del	ete Profile Ids For Selected Re	ecords: Delete Uploaded Data		

Click on go to the payment

					Dele	te Profile Ids For Selected Re	ecords: D	elete Uplo	aded Data					
						GO TO PAY	MENT SCR	EEN	>					
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	A00593059IB4791DBLGBQF	P Fresh					ENGLISH	Yes				2022-09-28 00:17:45.	O Generated	Profile Id. Generated
A00593060	A00593060IB4791DBLGBQF	Fresh					ENGLISH	Yes				0 2022-09-28 00:17:45.	Profile ID Generated	Profile Id Generated

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 V							
Select Candidate Type :	Fresh V									
	Search	eset Dates								
	No Profile ID Uploaded Details Found Between 2	022-09-28 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.

			Insura	nce Brokers	/ Point of	Sales Pers	on / Ins	urance Aç	jents - Payn	nent for P	rofile Ids		
	Uploa	aded From D	ate*:	28-09-2022		Uploaded To Date*:			28-09-2022				
	Profile ID:						Sta	atus:		To Do Payment 🗸			
	Selec	t Intermedia	ry Type :	Insurance Brok	ers 🗸			Select Insurance Category :		Direct Bro	ker (Life and Gen	eral) 🗸	
	Selec	t Corporate	Type :	Broker Qualifie	d Person 🗸	l Person 🗸			Select Training Language :		~		
	Select Candidate Type : Fresh V												
	Search Reset Dates												
Selec All	sr. No.	ICARD Number	Pro	ofile Id	Applicant Name	ant PAN No Mobi		le No Email ID		Internal reference number	Contact person Email id	Training Language	Status
	1	A00593059	A0059305918	34791DBLGBQP						2441	I.	ENGLISH	To Do Paymen
	2 A00593060 A00593060IB4791DBLGBQP									2441	t	ENGLISH	To Do Paymen
						Go to Paymer	nt: Go t	o Payment					
Selec	Servi	ce Provider	Name *	Select	~								

Select payment type GSTIN number and click on proceed

1	Uploa	ded From D	ate*:	28-09-2022			U	Uploaded To Date*: 28-		28-09-2022			
	Profile	a ID.					St	atus:					
Select Intermediary Type :								elect Insurance Category :	Direct Bro	ker (Life and Gen	eral) 🗸		
Select Corporate Type :				Broker Qualifie	d Person 🗸		Se	elect Training Language :	ENGLISH	✓			
	Select	t Candidate	Type :	Fresh V				,,		J			
	Search Reset Dates												
Soloci			ì						Internet				
All	Sr. No.	ICARD Number	Profile Id Applicant Name			PAN No	Mobile N	o Email ID	reference number	Contact person Email id	Training Language	Status	
	1	A00593059	A005930591	34791DBLGBQP					۱	ENGLISH	To Do Paymer		
	2	A00593060	A005930601	34791DBLGBQP					2441		ENGLISH	To Do Paymei	
						Go to Paymer	nt: Go t	to Payment					
Payme	nt Typ	oe: 🖲 Trai	ning Only										
Please	selec	t the mode (of payment:	Online		(O Web Wa	allet					
Select	Servio	e Provider I	Name * Train	ning Platform01	~								
GSTIN	State	*:		2	_								
SSTIN	No.:			_									
_ink to	add G	<u>ISTIN</u>											
						ſ	Proceed]					