

Online Payment Help Manual for Insurance Broker (Authorised Verifier)

Following are the steps to make the payment towards the online training by Online Payment for Insurance Broker (Authorised Verifier)

Step 01: Insurance Broker (Authorised Verifier) 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-> Insurance Broker (Authorised Verifier) -> 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-> Insurance Broker-> 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 Broker (Authorised Verifier) 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 . If you face any problem ,please mail us on reg.exams@iii.org.in.

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

The screenshot shows a web browser window displaying the 'Company Profile Creation' form. The form has a blue header and is organized into several sections:

- Company Details :** Includes 'Intermediary Type' (dropdown), 'Insurance Category' (dropdown with 'Add Category' and 'Remove Category' buttons), and 'Selected Insurance Category' (dropdown).
- Company Details :** Includes 'Company Name', 'Name of Principal Officer / Designated Person Name', 'Mobile number of Principal Officer / Designated Person', 'Company Telephone', 'Company Email', 'Company Address', 'State', 'District', 'Company PAN Number', 'Company PAN Card Image Upload' (with a 'Browse...' button and 'No file selected' message), and 'Contact Person Details' (Contact Person Name, Contact Person Mobile No.).

Please visit to insuranceinstituteofindia.com



Please enter your Insurance Broker (Authorised Verifier)Login details of www.insuranceinstuteofindia.com portal.

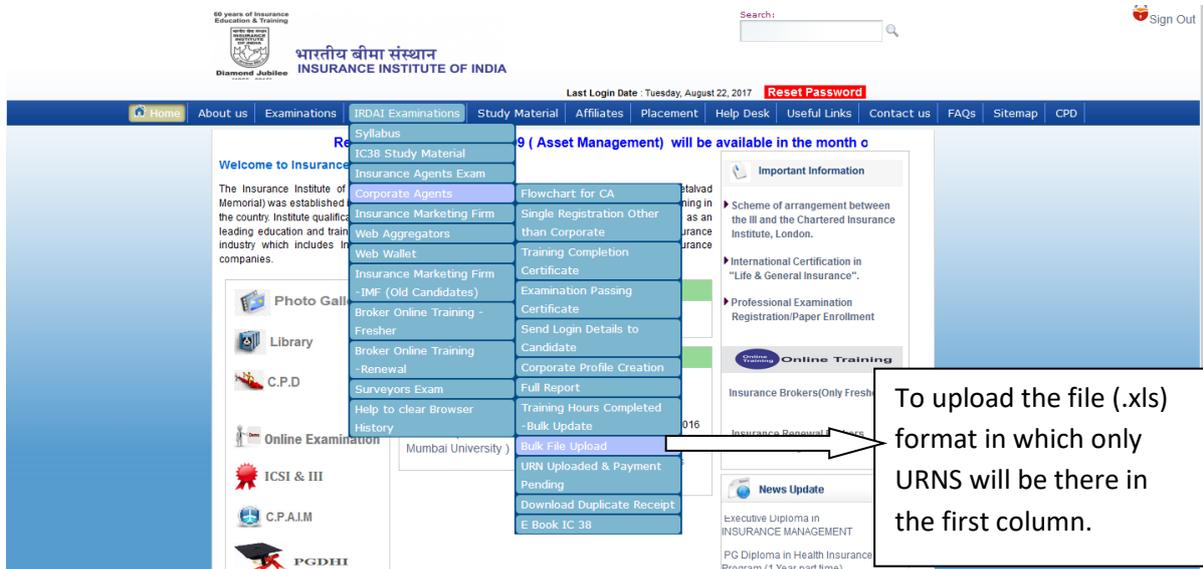
The screenshot shows the login page on the Insurance Institute of India website. The page title is 'Enter your Login Name and Password'. It contains the following elements:

- Login Name:** Input field containing 'cam1238'.
- Password:** Input field with masked characters.
- Buttons:** 'LOGIN' and 'CLEAR' buttons.
- Links:** 'Forgot Password', 'Reset Password Now', and 'Forgot Username(Registered Candidates)'.

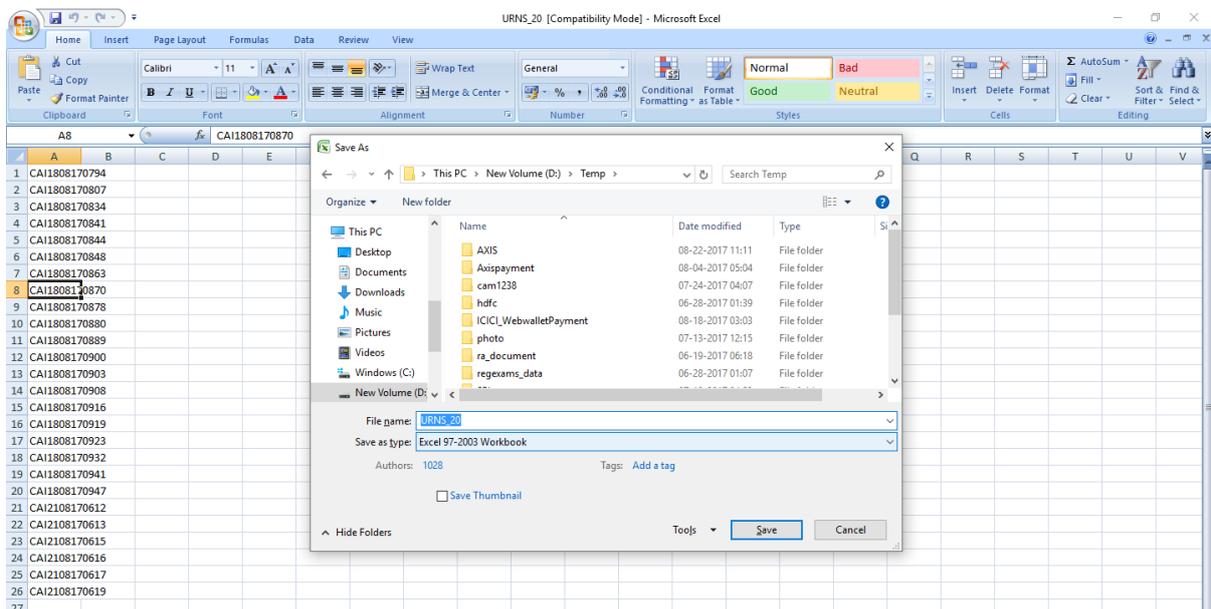
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Please refer exact steps to make the registration for online training

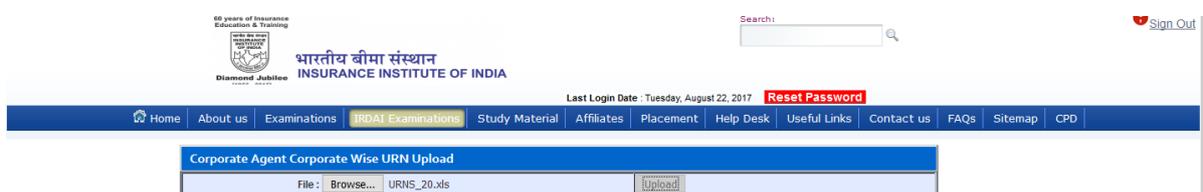
- 1) Bulk File Upload-> To upload the file in .xls format.



- 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. At the top, there are search filters for 'From Date' (22-08-2017) and 'To Date' (22-08-2017), and a 'Reset Dates' button. Below this, there is a 'TDS Deduction' dropdown menu currently set to 'No'. A warning message states: 'Once you select TDS [No], you cannot change afterwards.' Below the dropdown is a table with the following columns: 'Select All', 'TDS Deduction', 'URN', 'Uploaded Date', and 'Status'. The table contains 18 rows of data, all with a status of 'To Be Verified'.

| Select All | TDS Deduction | URN | Uploaded Date | Status |
|-------------------------------------|---------------|--------------|---------------------|----------------|
| <input checked="" type="checkbox"/> | No | 08170794 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170807 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170834 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170841 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170844 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170848 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170863 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170870 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170878 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170880 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170889 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170900 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170903 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170908 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170916 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170919 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | CA1808170923 | 22-08-2017 11:19:19 | To Be Verified |
| <input checked="" type="checkbox"/> | No | 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 table as above, but with a modal 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 box.

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The screenshot shows the 'IRDAI Examinations' section of the portal. A table lists various URNs, each with a checkbox, a date (22-08-2017 11:19:19), and a status of 'To Be Verified'. At the bottom of the table, there is a 'Verify with IRDA' button. A callout box with an arrow points to this button, containing the text: 'Click on "Verify with IRDA"'. Below the table, there are buttons for 'Go to Payment' and 'Update Verified', along with a note: 'Data for upload on 2017-08-22 11:19:308'. A warning message at the bottom of the table reads: '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:'.

After verification, the system will show you following screen.

The screenshot shows the 'Corporate Agent Corporate Wise URN Uploaded Details' screen. It features a search filter with 'From Date' and 'To Date' both set to '22-08-2017'. The 'Status' dropdown menu is set to 'To Be Verified'. Below the search fields, there is a 'Search' button and a message: 'No Uploaded URN Details Found Between 2017-08-22 00:00:00.0and 2017-08-22 23:59:59.0'. The page also includes a 'Reset Dates' button and a 'Sign Out' link in the top right corner.

Please select "To Do Payment" Filter as follows:

This screenshot is similar to the previous one, but the 'Status' dropdown menu is open, showing a list of options: '--Select--', 'ALL', 'To Be Verified', '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. The search results area still shows 'No Uploaded URN Details Found'.

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The screen will appear as per follows:

Corporate Agent Corporate Wise URN Uploaded Details

From Date: 22-08-2017 To Date: 22-08-2017 [Reset Dates](#)

URN: Status: * To Do Payment [Search](#)

| Select All | URN | Uploaded Date | Status |
|-------------------------------------|---------------|---------------------|---------------|
| <input checked="" type="checkbox"/> | CAI1808170794 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170807 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170834 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170841 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170844 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170848 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170863 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170870 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170878 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170880 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170889 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170900 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170903 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170908 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170916 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170919 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170923 | 22-08-2017 11:19:19 | To Do Payment |

Corporate Agent Corporate Wise URN Uploaded Details

From Date: 22-08-2017 To Date: 22-08-2017 [Reset Dates](#)

URN: Status: * To Do Payment [Search](#)

| Select All | URN | Uploaded Date | Status |
|-------------------------------------|---------------|---------------------|---------------|
| <input checked="" type="checkbox"/> | CAI1808170841 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170844 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170848 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170863 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170870 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170878 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170880 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170889 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170900 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170903 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170908 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170916 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170919 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170923 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170932 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170941 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI1808170947 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI2108170612 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI2108170613 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI2108170615 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI2108170616 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI2108170617 | 22-08-2017 11:19:19 | To Do Payment |
| <input checked="" type="checkbox"/> | CAI2108170619 | 22-08-2017 11:19:19 | To Do Payment |

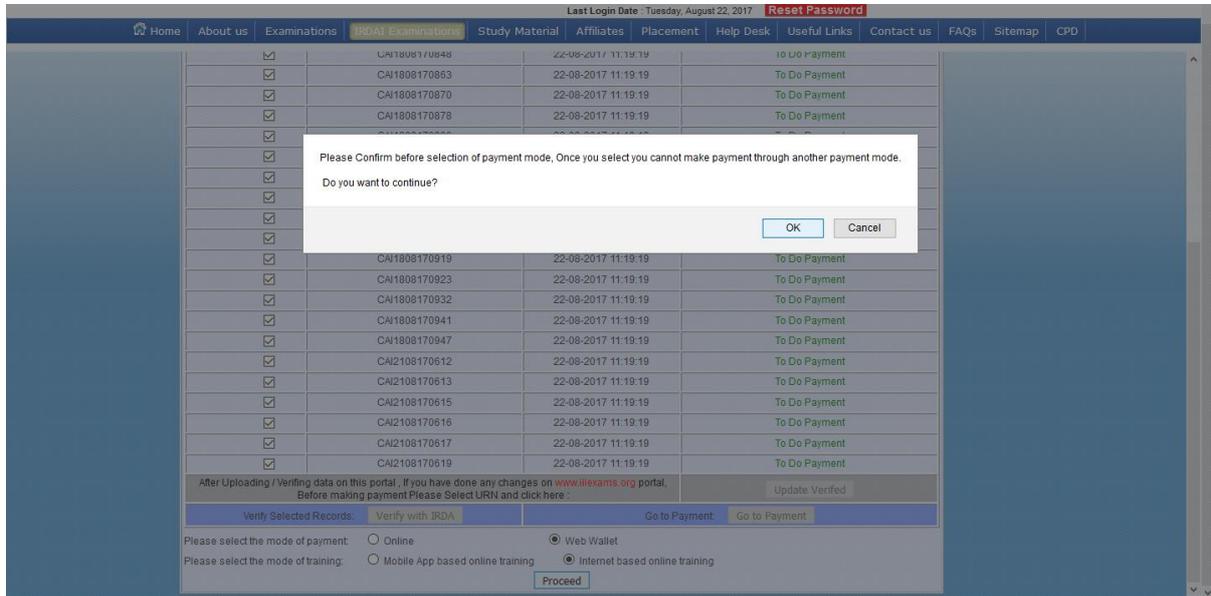
After Uploading / Verifying data on this portal, if you have done any changes on www.iieexams.org portal, Before making payment Please Select URN and click here. [Update Verified](#)

Verify Selected Records: [Verify with IRDA](#) [Go to Payment](#) [Go to Payment](#)

Please click on "Go to Payment"

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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. A navigation menu is visible with options like Home, About us, Examinations, IRDAI Examinations, Study Material, Affiliates, Placement, Help Desk, Useful Links, Contact us, FAQs, Sitemap, and CPD. The main content area features a form titled "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 | 25 |
| 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