

Web-Wallet Help Manual for Insurance Brokers (Authorised Verifier)

Following are the steps to make the payment towards the online training by Web-Wallet Payment for Insurance Brokers (Authorised Verifier)

Step 01: Insurance Brokers (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=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.

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.

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

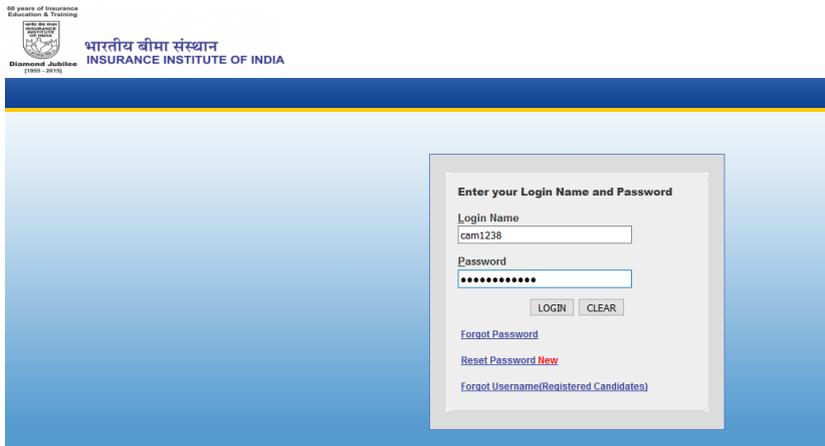
Insurance Brokers (Authorised Verifier) will get the dashboard so that they can review live training hours status report.

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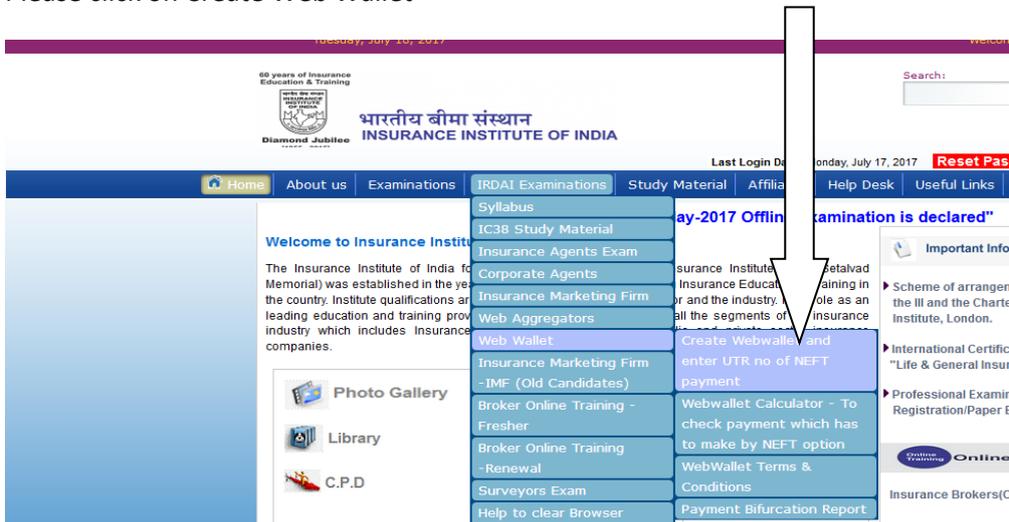
- 2) **Internet Based Online Training** : The candidate can complete the training in online mode for which internet connection is required. The candidate can access the training using the training link <https://iii.learningmate.com/iii/>

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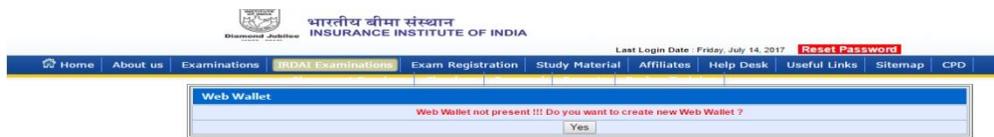
Please enter your Insurance Brokers (Authorised Verifier) Login details of www.insuranceinstituteofindia.com portal.



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



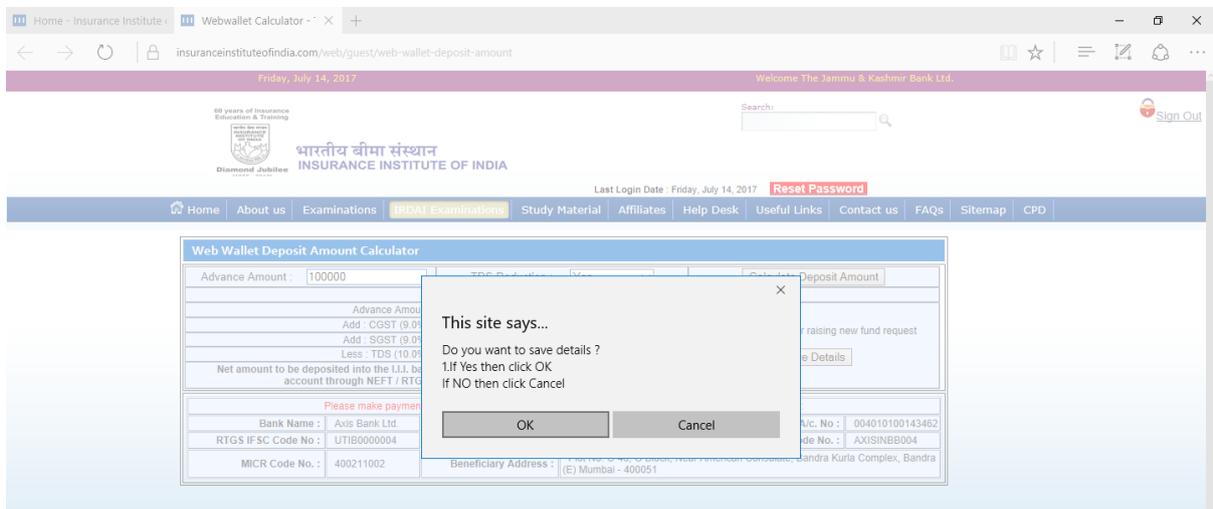
Web Wallet Deposit Amount Calculator

Advance Amount :	<input type="text" value="100000"/>	TDS Deduction :	<input type="text" value="Yes"/>	<input type="button" value="Calculate Deposit Amount"/>
Advance Amount	100000	Save calculations for raising new fund request <input type="button" value="Save Details"/>		
Add : CGST (9.0%)	9000			
Add : SGST (9.0%)	9000			
Less : TDS (10.0%)	10000			
Net amount to be deposited into the I.I.I. bank account through NEFT / RTGS	108000.00			
Please make payments through NEFT/RTGS into III Bank Account. Following are the account details :				
Bank Name :	Axis Bank Ltd.	Beneficiary Name :	Insurance Institute of India	
RTGS IFSC Code No :	UTIB0000004	Branch Address :	Sir P M Road, Fort, Mumbai - 400002	
MICR Code No. :	400211002	Beneficiary Address :	Plot No. 1, C.P.D. Building, Consulate, Bandra Kurla Complex, Bandra Kurla	

This is the Net Amount which you have to pay by NEFT

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

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”

The screenshot shows the 'Corporate Profile Creation' page. The 'Web Wallet' menu is expanded, and the option 'Create Webwallet or enter UTR no. of NEFT payment' is highlighted. A callout box with an arrow points to this option, containing the text 'To Enter UTR No'.

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**

The screenshot shows the 'Web Wallet Calculator' page. The search criteria are set to 'Date From: 14-07-2017' and 'To: 14-07-2017'. The 'Search' button is visible.

Screen shows as follows:-

The screenshot shows the 'Web Wallet' page with a table of fund request records. The first record is selected, and the 'Proceed' button is visible.

Select	Sr.No.	Fund Id	Base Amount	Service Tax	SwachBharat Tax	Krishikalyan Tax	TDS Amount	Deposit amount
<input checked="" type="checkbox"/>	1	21146	100000	0	0	0	10000	108000

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

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Last Login Date : Friday, July 14, 2017 [Reset Password](#)

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Web Wallet Fund Request Form

Type:

Transaction Date:

Advance Amount:

Deposit Amount:

Name of Bank Through amount deposited:

UTR No./Transaction No:

I hereby declare that all the details entered are correct.

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

Last Login Date : Friday, July 14, 2017 [Reset Password](#)

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Web Wallet

Your Current Balance : 0

Do you want to raise new fund request?

Pending Requests:

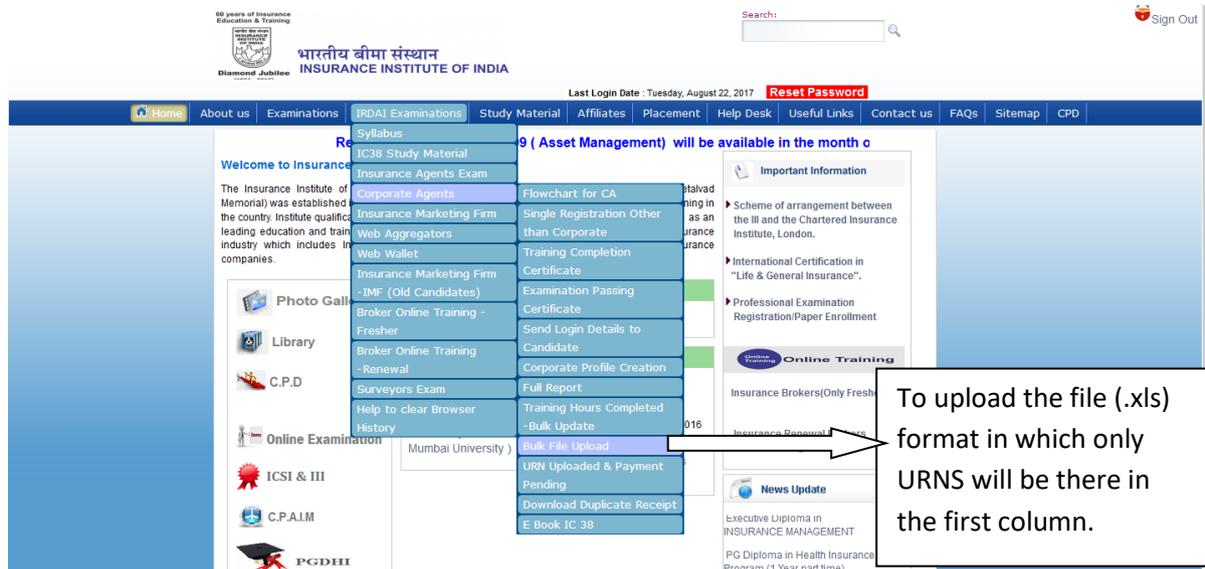
Sr.No.	Fund Id	Base Amount	Service Tax	Swachbharat Tax	Krishikalyan Tax	TDS	Deposit Amount	Request Raised Date	Transaction Date	UTR No.	Bank Name	Status	Action
1	21146	100000	0	0	0	10000	108000	14-07-2017	07-07-2017	JAKA070717017940	Jammu and Kashmir Bank	Pending with Maker	<input type="button" value="Update"/> <input type="button" value="Delete"/>

Fund request raised successfully !!!

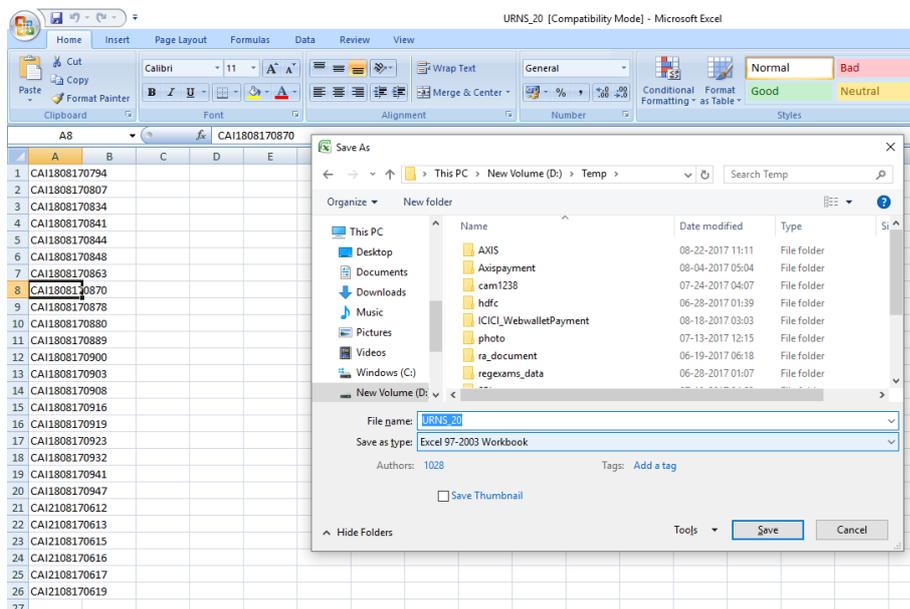
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Please refer exact steps to make the registration for online training

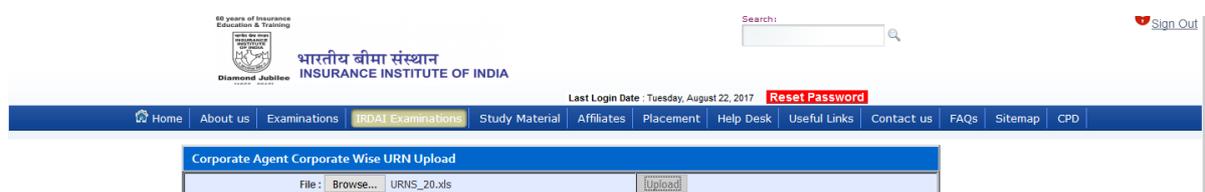
- 1) Bulk File Upload-> To upload the file in .xls format.



- 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 'Status' dropdown set to 'To Be Verified'. Below the filters, there is a 'TDS Deduction' dropdown menu with options 'No' and 'Yes'. A warning message states: 'Once you select TDS Yes/No cannot change afterwards.' Below this is a table with columns: 'Select All', 'Yes', 'No', 'URN', 'Uploaded Date', and 'Status'. The table contains 18 rows of data, all with a status of 'To Be Verified'.

Select All	Yes	No	URN	Uploaded Date	Status
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170794	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170807	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170834	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170841	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170844	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170848	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170863	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170870	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170878	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170880	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170889	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170900	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170903	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170908	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170916	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170919	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170923	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170932	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.

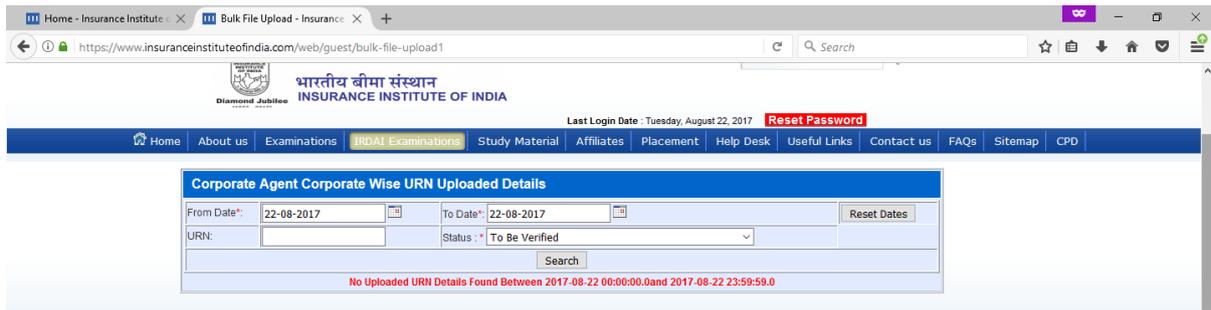
The screenshot shows the same 'Corporate Agent Corporate Wise URN Uploaded Details' page. The table now contains 20 rows of data. At the bottom of the page, there is a 'Verify with IRDA' button. A callout box with an arrow points to this button, containing the text: 'Click on “Verify with IRDA”'. Below the table, there is a message: '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:'. At the very bottom, there is a 'Data for upload on 2017-08-22 11:19:19.308'.

Select All	Yes	No	URN	Uploaded Date	Status
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170841	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170844	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170848	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170863	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170870	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170878	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170880	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170889	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170900	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170903	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170908	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170916	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170919	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170923	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170932	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170941	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI1808170947	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI2108170612	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI2108170613	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI2108170615	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI2108170616	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI2108170617	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CAI2108170619	22-08-2017 11:19:19	To Be Verified

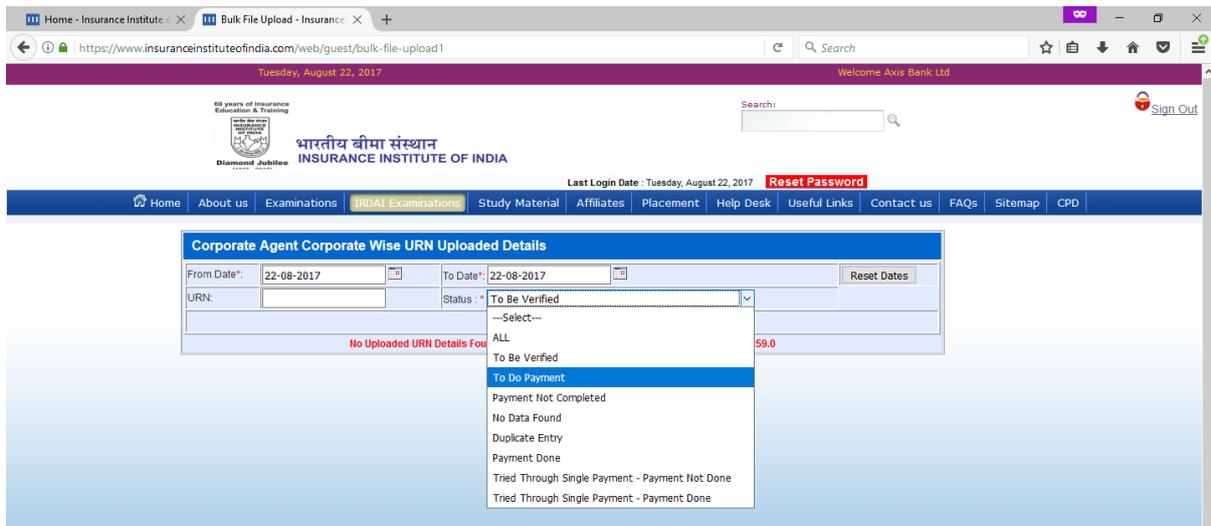
Click on “Verify with IRDA”

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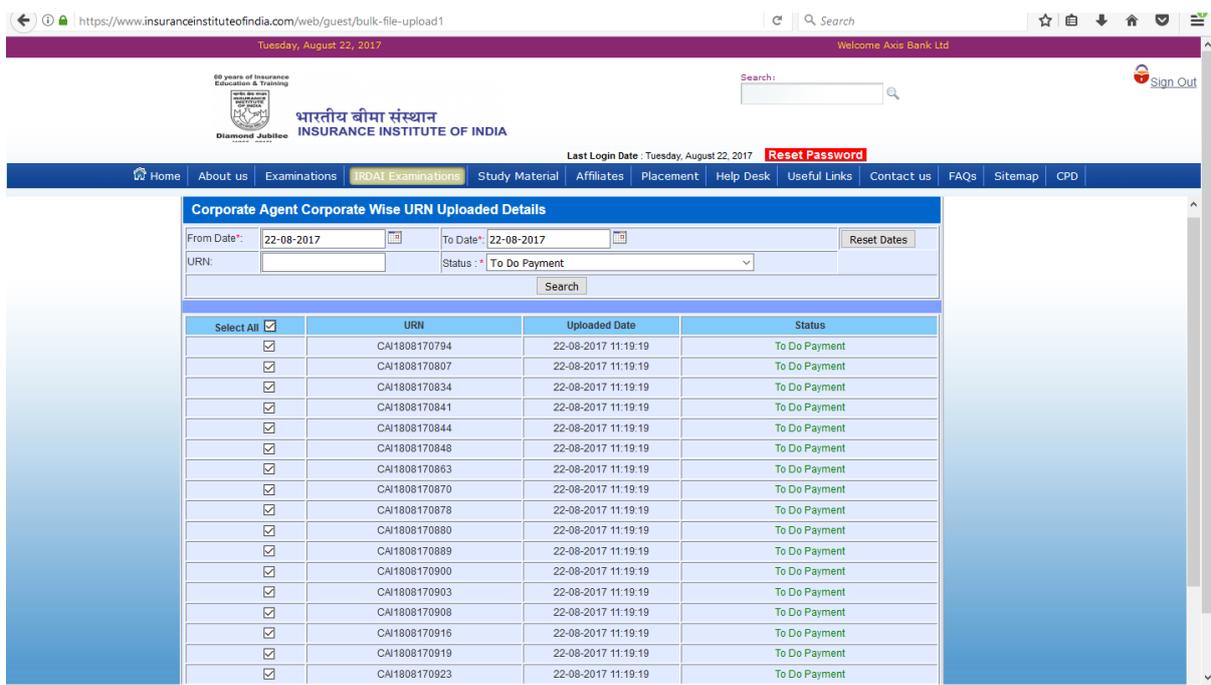
After verification, the system will show you following screen.



Please select "To Do Payment" Filter as follows:



The screen will appear as per follows:



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The screenshot shows the 'IIRDA Examinations' section of the portal. A table lists various examination records with columns for selection status, URN, date, and payment status. At the bottom, there are buttons for 'Verify Selected Records', 'Verify with IRDA', and 'Go to Payment'. A callout box with an arrow points to the 'Go to Payment' button, containing the text: "Please click on 'Go to Payment'".

Selection	URN	Date	Payment Status
<input checked="" type="checkbox"/>	CA11808170841	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170844	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170848	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170863	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170870	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170878	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170880	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170889	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170900	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170903	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170908	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170916	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170919	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170923	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170932	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170941	22-08-2017 11:19:19	To Do Payment
<input checked="" type="checkbox"/>	CA11808170947	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

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.

The screenshot shows the same list of records as above. A modal dialog box is displayed in the center with the text: "Please Confirm before selection of payment mode, Once you select you cannot make payment through another payment mode. Do you want to continue?". Below the dialog are 'OK' and 'Cancel' buttons. At the bottom of the page, there are radio buttons for 'Online' and 'Web Wallet', and another 'Proceed' button. A callout box with an arrow points to the 'Proceed' button, containing the text: "Click on 'Proceed Button'".

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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

