Online Payment Help Manual for Insurance Marketing Firm

Following are the steps to make the payment towards the online training by Online Payment for Insurance Marketing Firm

Step 01: Insurance Marketing Firmmust 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/corporate-profile-creation1)

Step 03: Sign in using id and password-> www.insuranceinstituteofindia.com

Step 04: 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 05: 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.

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 Marketing Firmwill 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.

Online Payment Help Manual for Insurance Marketing Firm

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 . Your company should come automatically so that you can enter your company details. But your company name does not show automatically, please mail us on reg.exams@iii.org.in.

https://www.insuranceinstituteofindia.com/web/guest/corporate-profile-creation1

Please visit to insuranceinstituteofindia.com

Please click on "Sign In"

Please enter your Insurance Marketing FirmLogin details of www.insuranceinstuteofindia.com portal.

Online Payment Help Manual for Insurance Marketing Firm

Please refer exact steps to make the registration for online training

1) Bulk File Upload-> To upload the file in .xls format.
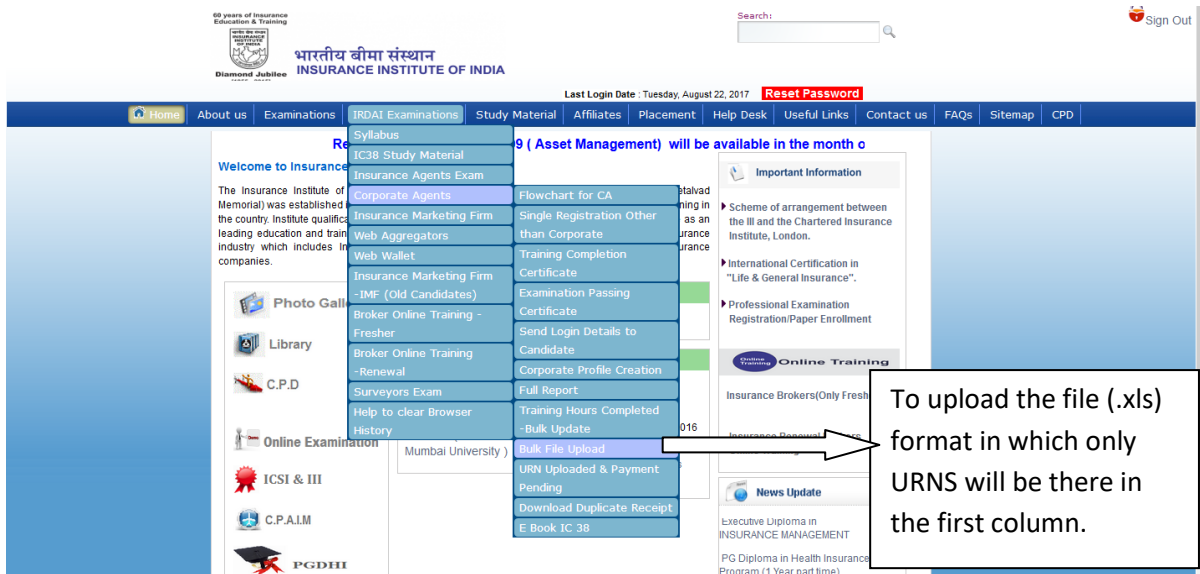
2) Please copy URNs in first column and save the file with .xls extension (Excel 97-2003 Workbook)
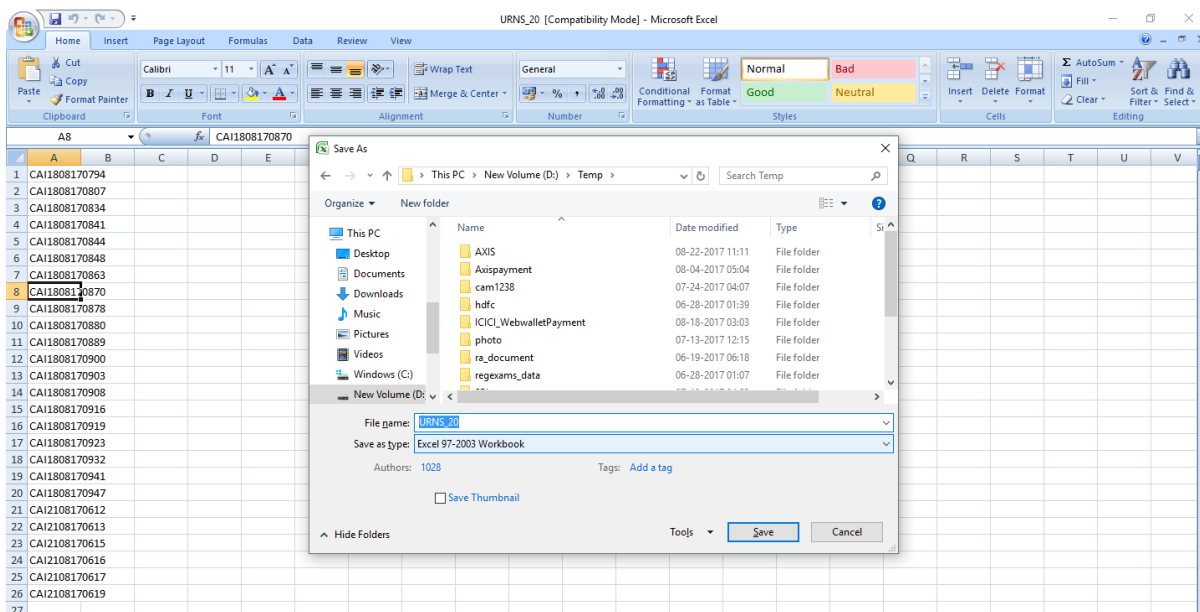
3) The system will ask the file of URNs (.xls extension) which you want to upload.
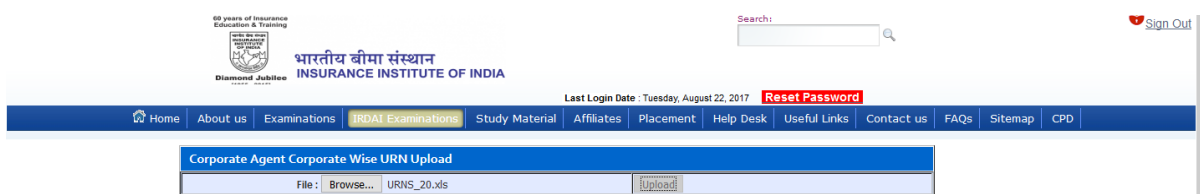
Online Payment Help Manual for Insurance Marketing Firm

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.

Online Payment Help Manual for Insurance Marketing Firm

Click on "Verify with IRDA"

After verification, the system will show you following screen.

Please select "To Do Payment" Filter as follows:

Online Payment Help Manual for Insurance Marketing Firm

The screen will appear as per follows:

Please click on "Go to Payment"

Online Payment Help Manual for Insurance Marketing Firm

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.
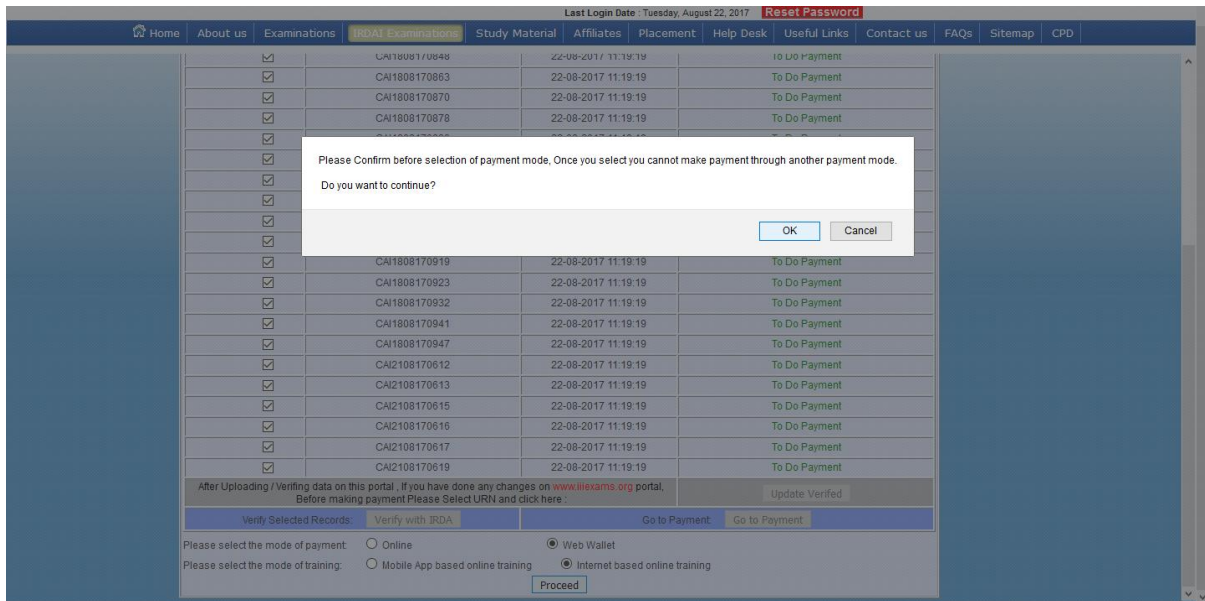
You can use Online option if you want to make the payment using "Debit Card/Credit Card/ Internet Banking"

(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

Online Payment Help Manual for Insurance Marketing Firm