

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 Firm 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/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 Firm 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. 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>

The screenshot shows the 'Corporate Agent Corporate Profile Creation' form. It is divided into two main sections: 'Corporate Details' and 'Contact Person Details'. Each section contains several input fields for text entry, followed by a 'Submit' button at the bottom right.

Corporate Details :	
Corporate Name :*	<input type="text"/>
Corporate Telephone :*	<input type="text"/>
Corporate Email :*	<input type="text"/>
Corporate Address :	<input type="text"/>
Contact Person Details :	
Contact Person :*	<input type="text"/>
Contact Person Mobile No. :*	<input type="text"/>
Contact Person Telephone :	<input type="text"/>
Contact Person Email :*	<input type="text"/>
<input type="button" value="Submit"/>	

Please visit to insuranceinstituteofindia.com



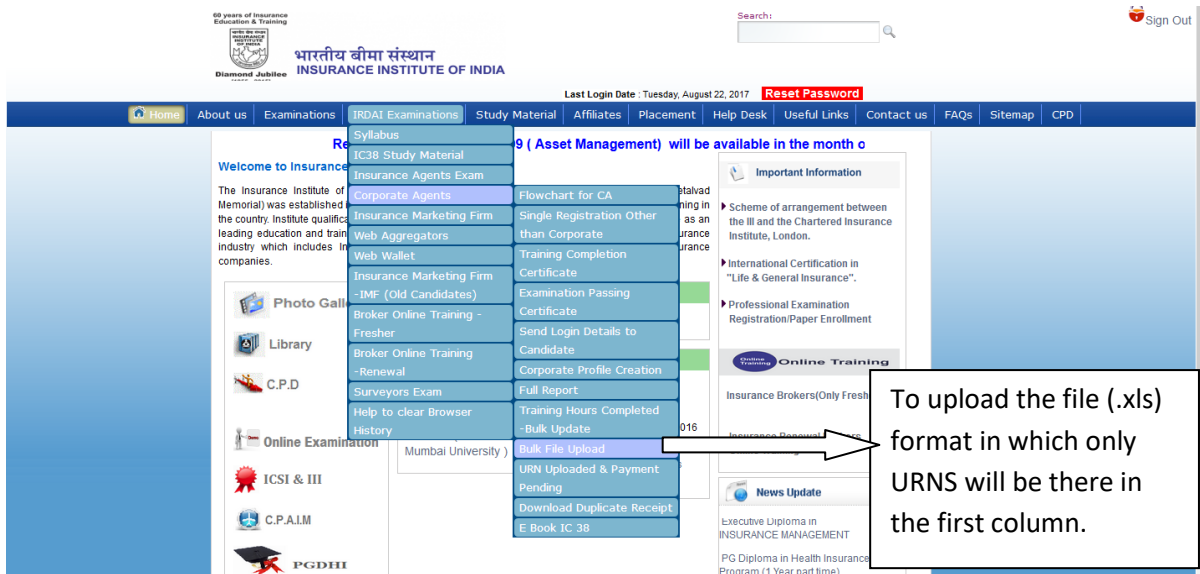
Please enter your Insurance Marketing FirmLogin details of www.insuranceinstituteofindia.com portal.

The screenshot shows the login form titled 'Enter your Login Name and Password'. It has two input fields: 'Login Name' (containing 'cam1238') and 'Password' (masked with dots). Below the fields are 'LOGIN' and 'CLEAR' buttons. There are also links for 'Forgot Password', 'Reset Password New', and 'Forgot Username(Registered Candidates)'.

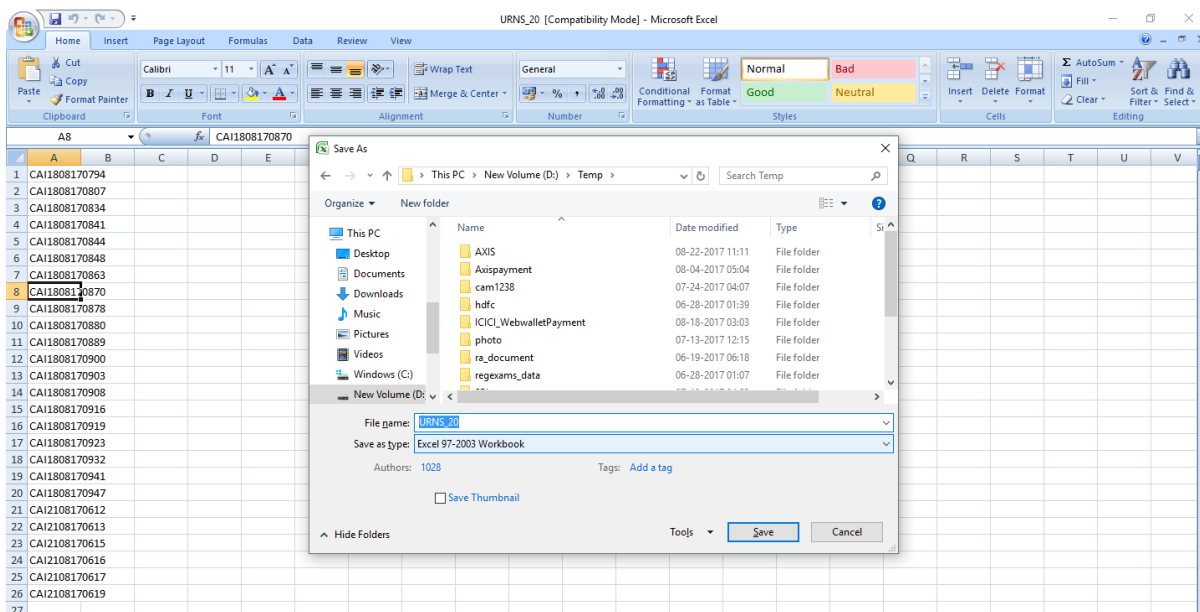
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Please refer exact steps to make the registration for online training

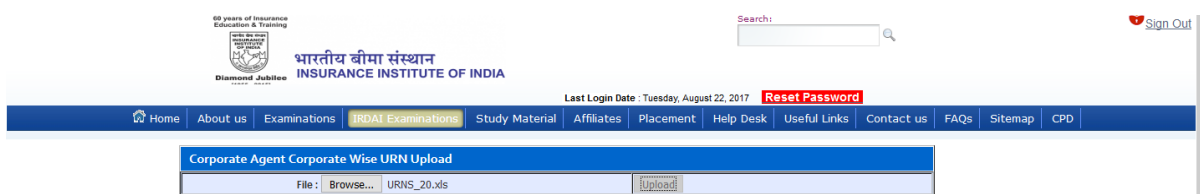
- 1) Bulk File Upload-> To upload the file in .xls format.



- 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 on the Insurance Institute of India website. The page includes a search filter for 'TDS Deduction' with a dropdown menu set to 'No'. A table lists URNs, uploaded dates, and statuses, all marked as 'To Be Verified'.

Select All	Yes	URN	Uploaded Date	Status
<input checked="" type="checkbox"/>	No	08170794	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170807	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170834	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170841	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170844	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170848	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170863	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170870	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170878	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170880	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170889	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170900	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170903	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170908	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170916	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170919	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		CA1808170923	22-08-2017 11:19:19	To Be Verified
<input checked="" type="checkbox"/>		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 a confirmation dialog box over the 'Corporate Agent Corporate Wise URN Uploaded Details' page. The dialog box asks for confirmation before selecting the YES/NO option for TDS Deduction, stating that the option cannot be changed after selection.

Please Confirm before the select YES/NO option for TDS Deduction, after verifying you cannot change the option.
Do you want to continue.

OK Cancel

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.

Verify Selected Records Verify with IRDA Go to Payment: Go to Payment.

Data for upload on 2017-08-22 11:19:19.308

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The screenshot shows a table with columns for URN, Date, and Status. All status entries are 'To Be Verified'. Below the table, there are buttons for 'Verify with IRDA' and 'Go to Payment'. A callout box with a white background and black border contains the text: "Click on 'Verify with IRDA'" with a black arrow pointing to the 'Verify with IRDA' button.

After verification, the system will show you following screen.

The screenshot shows the search interface for 'Corporate Agent Corporate Wise URN Uploaded Details'. It includes fields for 'From Date' (22-08-2017) and 'To Date' (22-08-2017), a 'URN' field, and a 'Status' dropdown menu currently set to 'To Be Verified'. A 'Search' button is located below these fields. A red message at the bottom states: "No Uploaded URN Details Found Between 2017-08-22 00:00:00.0and 2017-08-22 23:59:59.0".

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 filter options. The 'To Do Payment' option is highlighted in blue. The other options in the list include: 'To Be Verified', '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 red message at the bottom now reads: "No Uploaded URN Details Found 59.0".

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The screen will appear as per follows:

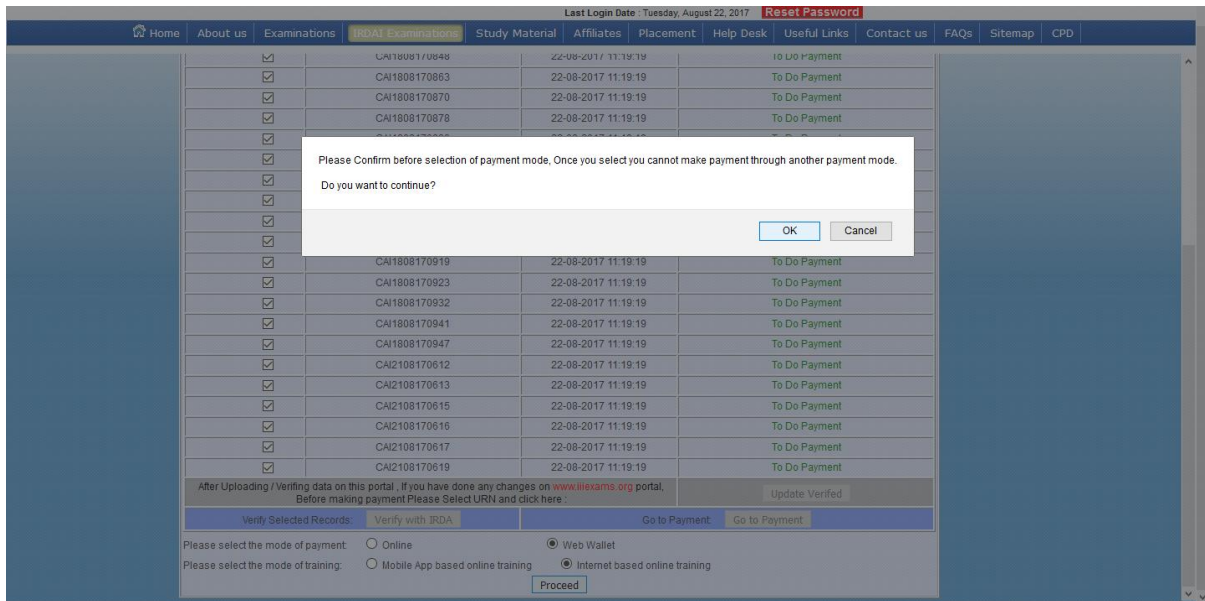
The screenshot shows the Insurance Institute of India website interface. At the top, there is a navigation menu with options like Home, About us, Examinations, IRDAI Examinations, Study Material, Affiliates, Placement, Help Desk, Useful Links, Contact us, FAQs, Sitemap, and CPD. The main content area is titled 'Corporate Agent Corporate Wise URN Uploaded Details'. It features a search filter with 'From Date' and 'To Date' set to '22-08-2017', and a 'Status' dropdown menu set to 'To Do Payment'. Below the search filter is a table with the following data:

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

This screenshot is similar to the one above but shows a larger portion of the table. At the bottom of the table, there is a message: '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:'. Below this message are two buttons: 'Update Verified' 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"'. The 'Go to Payment' button is highlighted in blue.

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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, along with a navigation menu. The main content area displays a 'Corporate Wise Payment Confirmation For Web Wallet' form.

Corporate Wise Payment Confirmation For Web Wallet	
Date : 22/08/2017	Order No : 97114001
Candidate Name	Ais Bank Ltd*
Email	sakharam.kode@aisbank.com
Mobile	9821458542
Payment Details	
Corporate Id	1227
No Of Candidates	26
Grand Total	19500

I have read and understood the Help Manual available on website.
I agree that decision of Ii in all the matters will be final and binding upon me.

Please Confirm

Yes No