Brokers Bulk Registration

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

Company can enrol their candidates for two Certificate of Registration and five Insurance Category

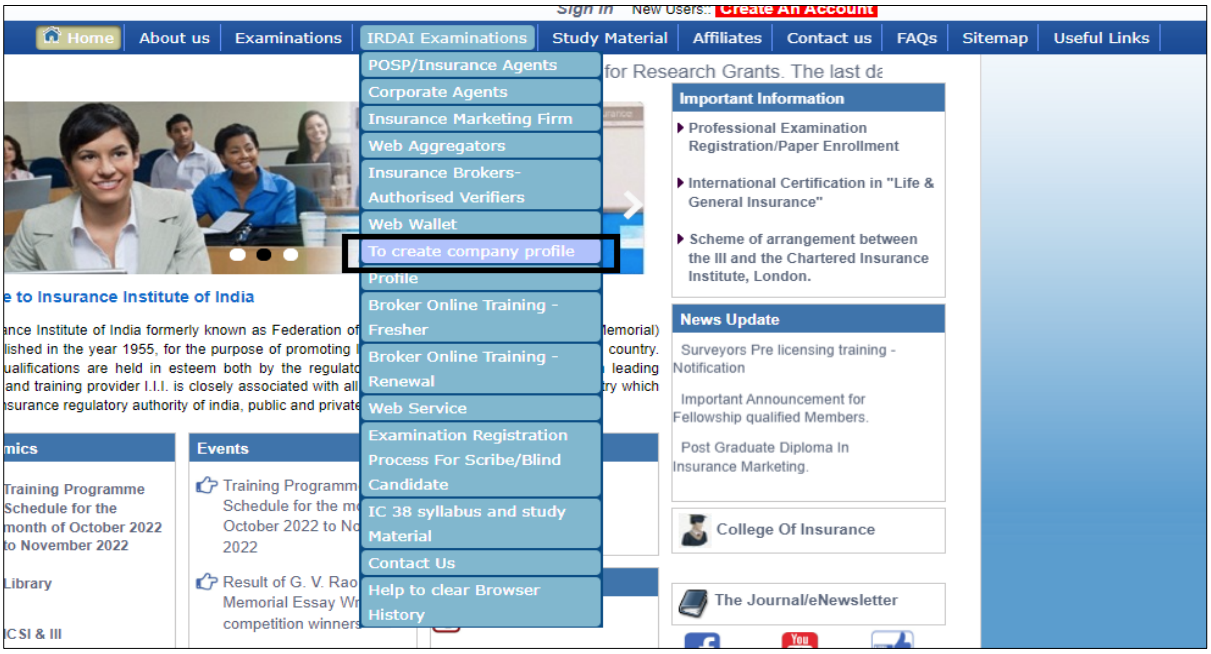
Certificate of Registration	Insurance Category
1. Principal Officer	1. Direct Life Broker
2. Broker Qualified Person	2. Direct General Broker
	3. Direct Life and General Broker
	4. Composite Broker
	5. Reinsurance Broker

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.**



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

Brokers Bulk Registration

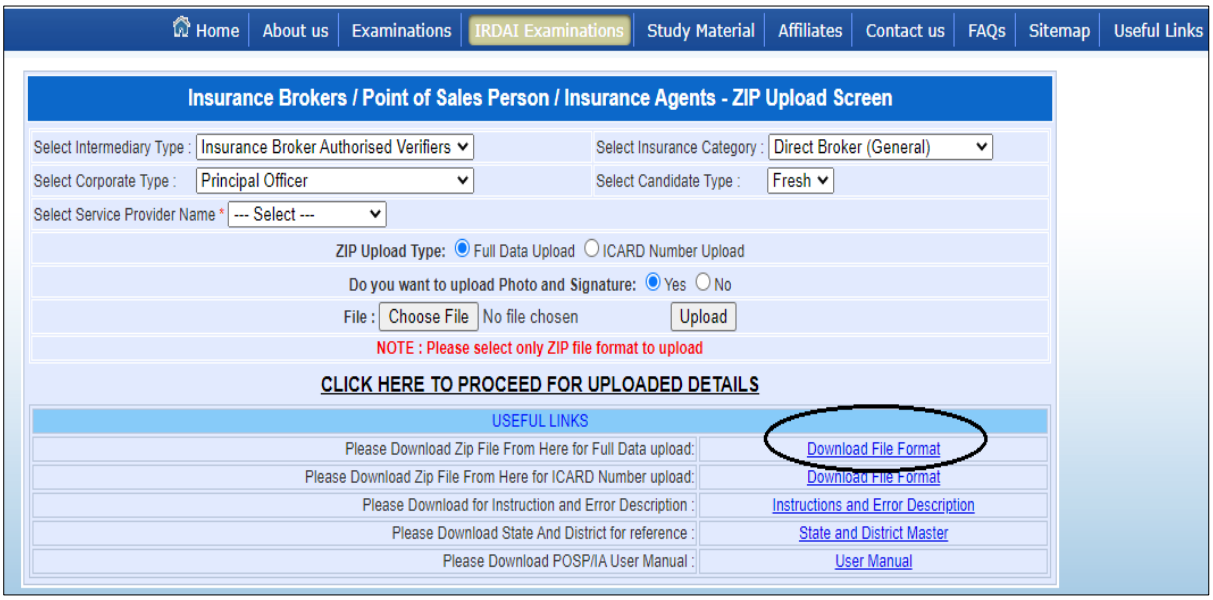
Step 2 : Updation of GSTIN number :

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.**

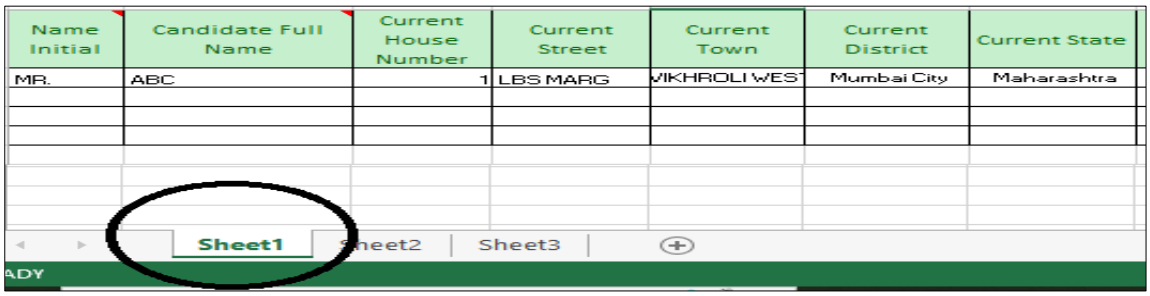


Brokers Bulk Registration

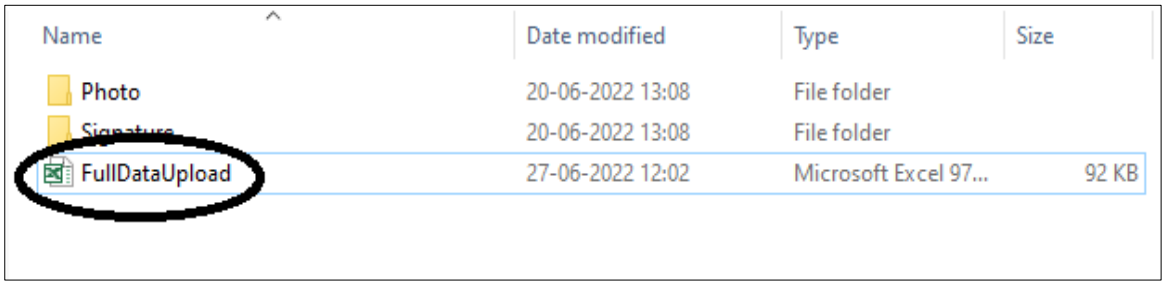
Step 4:Preparing excel files and folders of signature and photos

Instructions to prepare excel

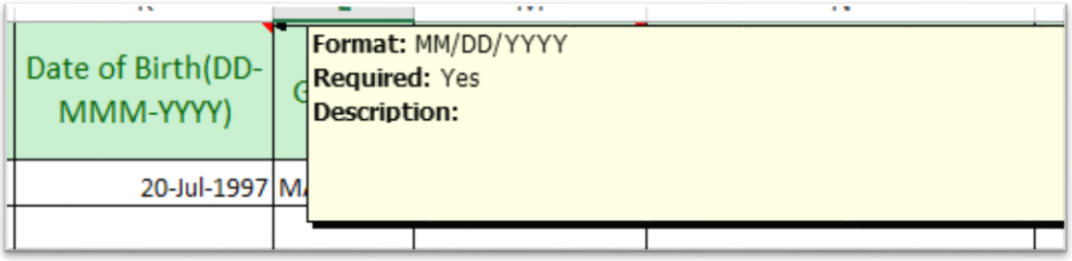
1. Excel sheet name should be **Sheet1**



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



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



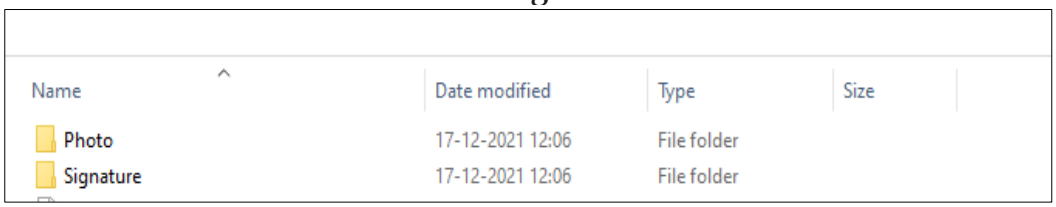
5. The Mobile number should be **10 digits only**. No prefixed or any other STD code should be included.
6. The Candidate's Email id and Contact person's Email Id **should not be same**.
7. Every candidate will have a different email id.
8. For Photo File Name **column** write **Photo** and for Signature File Name **column** write Signature inside excel file for all entries

Photo File Name	Signature File Name
Photo	Signature

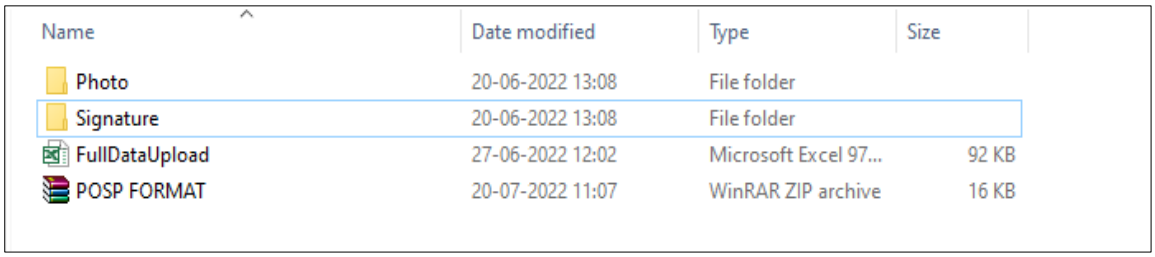
9. Training and Examination language should be written in **CAPITAL** letters only.

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.**

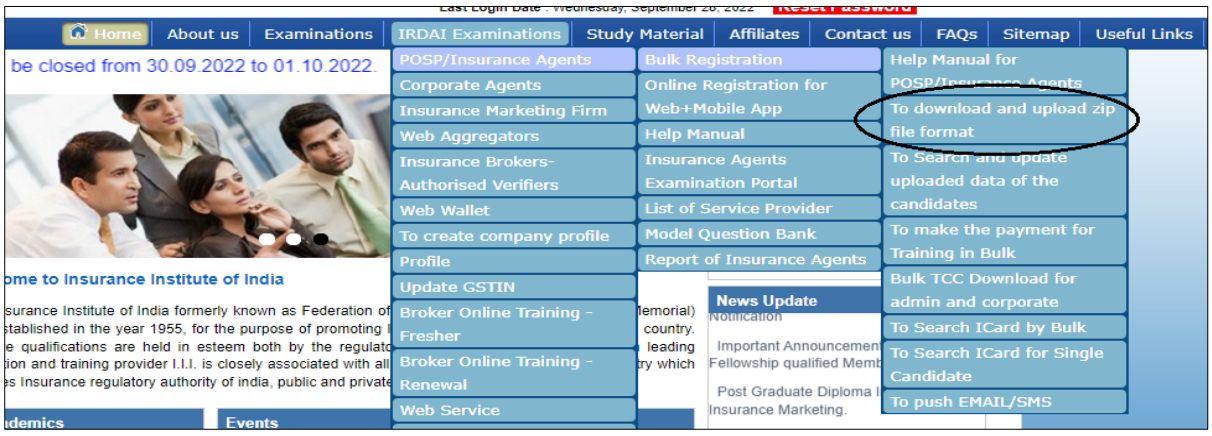


11. Photo and signature is not mandatory. If you are uploading the Candidate's photo and signature then it will be saved in the name of their **PAN number** in both folders.
12. If you are not attaching photo and signature then also create 2 folder with name Photo" and "Signature and keep it empty
13. Make a zip of Photo folder , Signature Folder & Excel file and upload it
    1)excel file- FullDataUpload
    2) Photo folder
    3) Signature folder



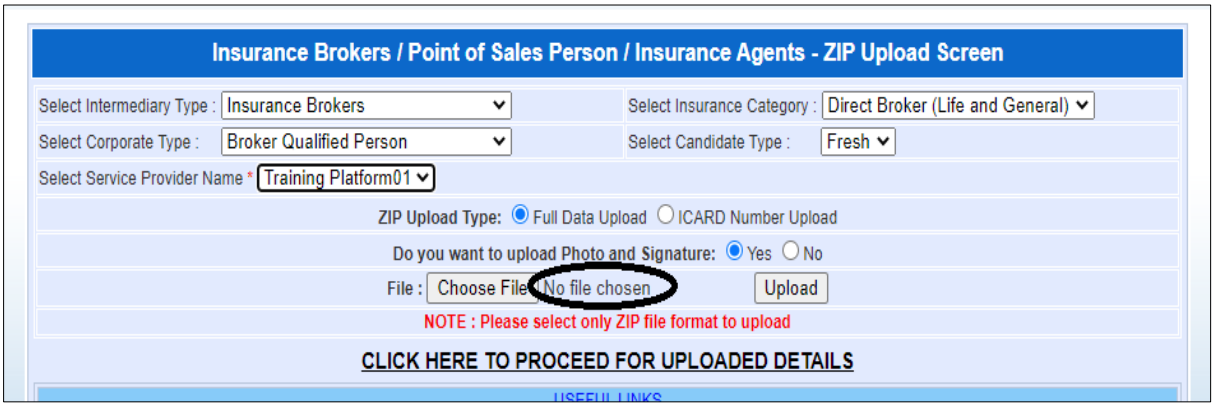
Step 5:Uploading files as per format

Please select the below option to upload the data on the portal.

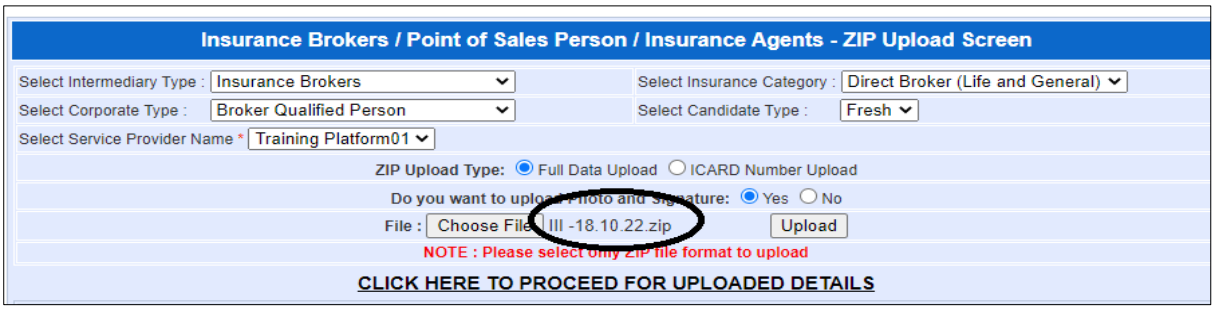


Brokers Bulk Registration

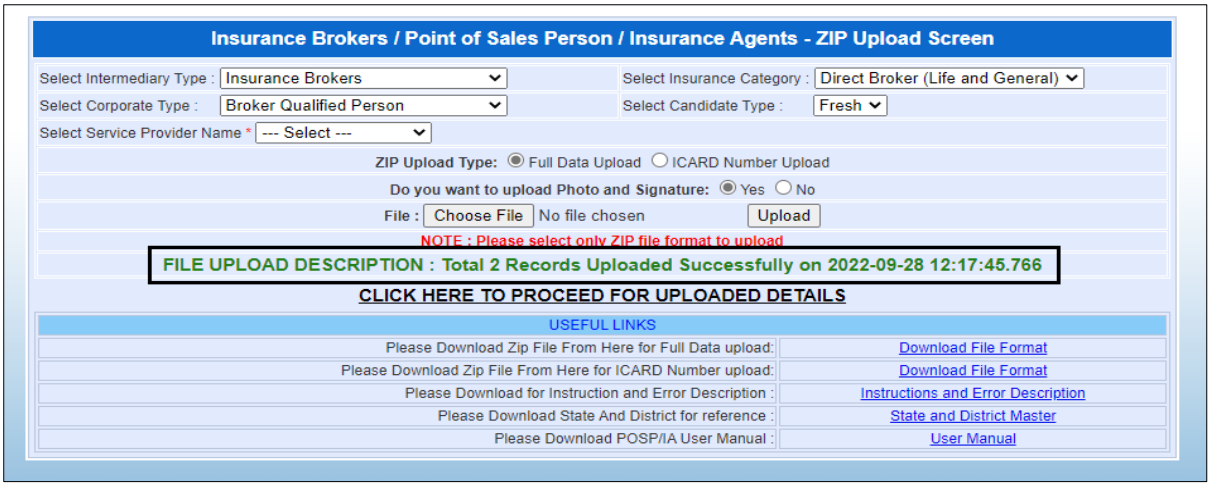
Below screen will appear. Please select option as per your company requirement.

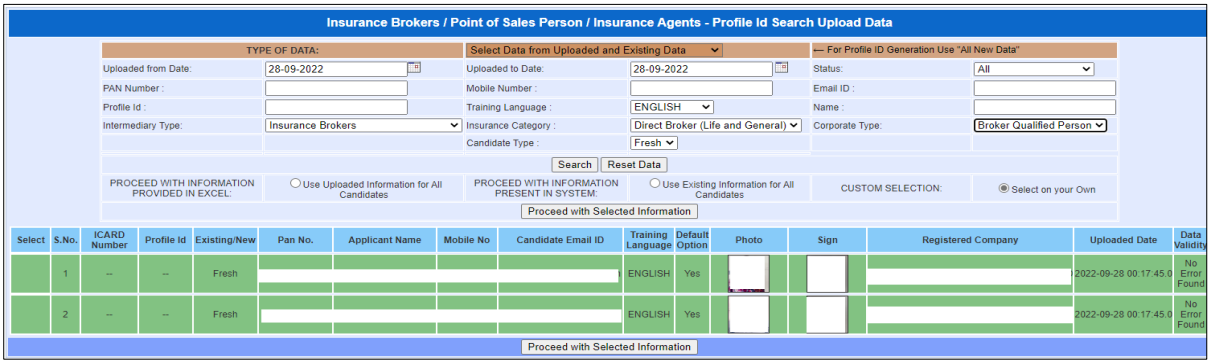


After selecting zip file, File name will display on portal.

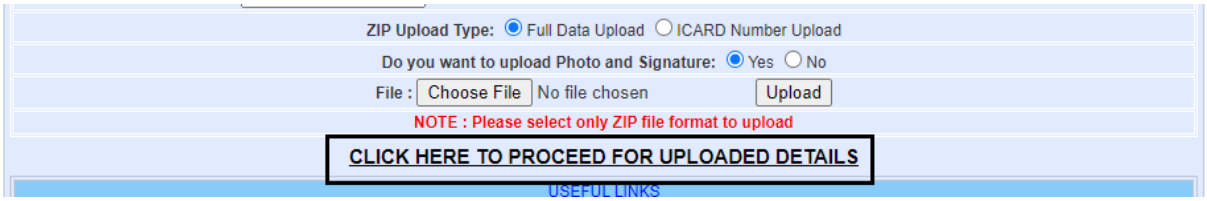


After file uploaded successfully it will show below message on the screen



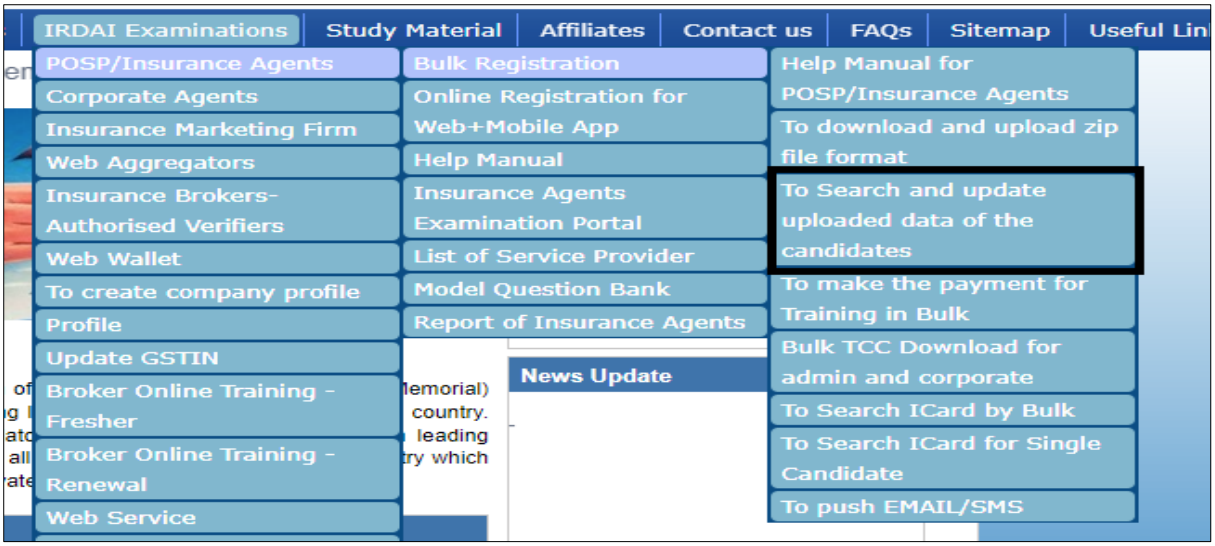


Then click on proceed for the uploaded details the uploaded records will display on portal.

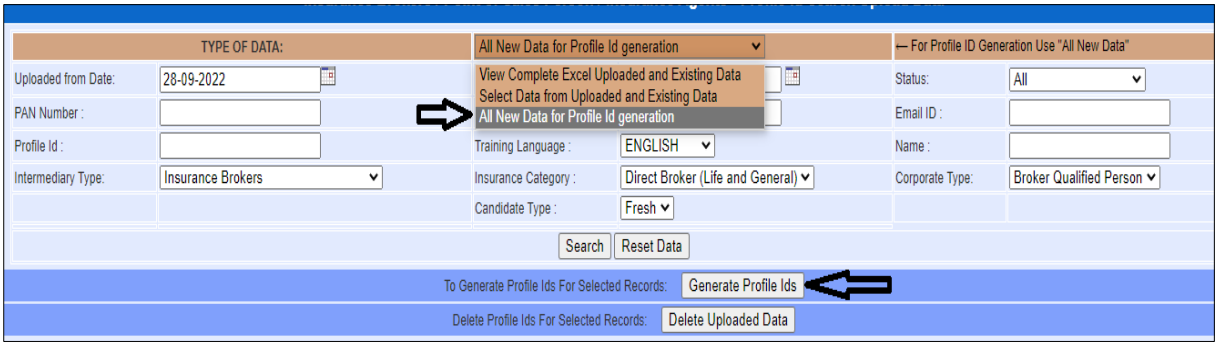


Step 6 :Generation of Profile ID

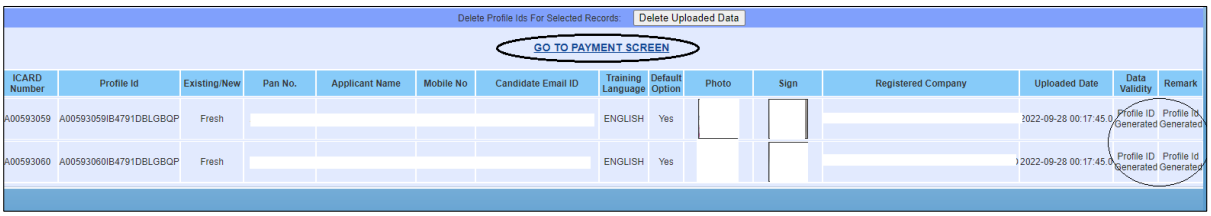
Select the option to search the upload data



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



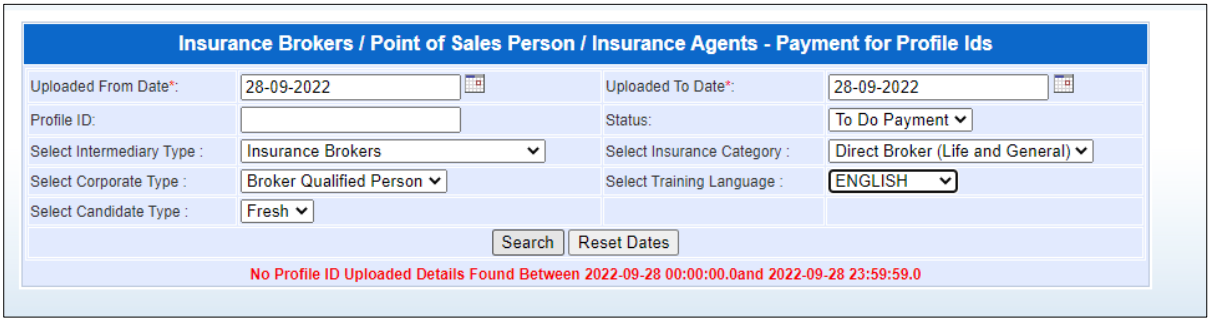
Click on go to the payment



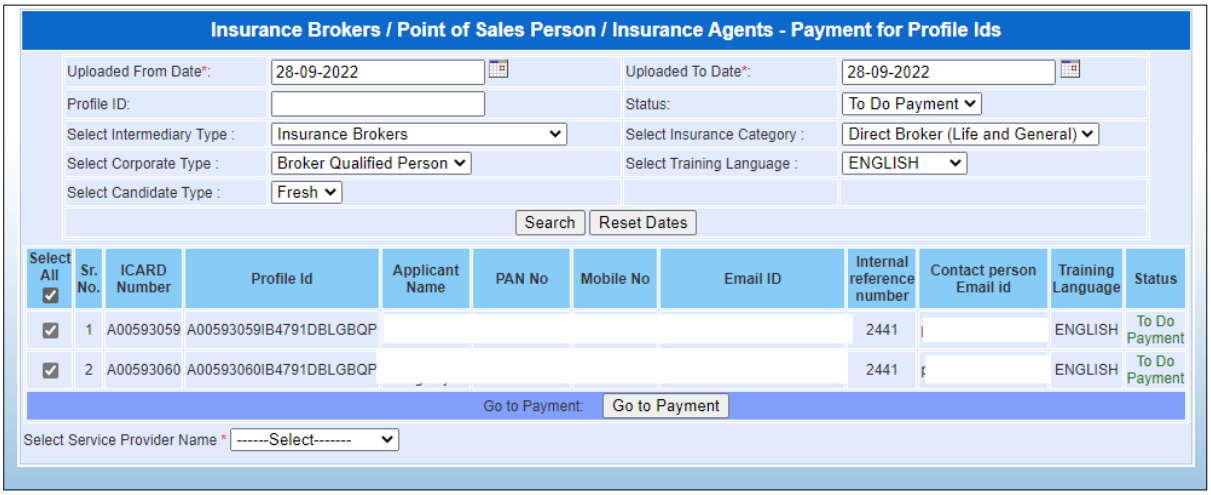
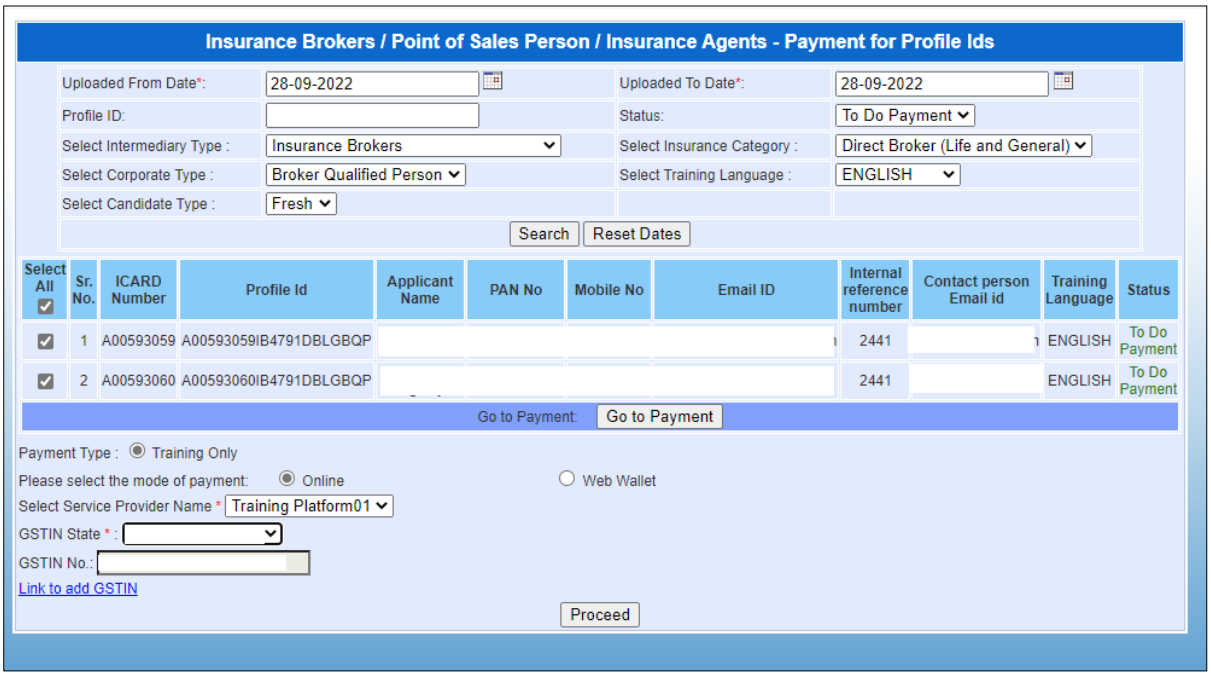
Brokers Bulk Registration

Step 7 : Payment of bulk registration

Select option and click on search and pay the fees



Candidate data will display on the screen. Select the records for you want to pay the fees.



Select payment type GSTIN number and click on proceed