

## Advisor self-help module

A flexible & easy –to-manage you service request on your figure prints.

1. Name Updation
2. Updation of bank details
3. Advisor contact ( Mob & Address )
4. GST update
5. Welcome - Kit

Just go to our website [www.iciciprulife.com](http://www.iciciprulife.com) → Select role as Advisor → Log in with user ID & password

The screenshot displays the ICICI Prudential Life Insurance website. The header includes the logo, a search bar, a 'LOGIN' button, and navigation links for 'About Us', 'Careers', 'Contact Us', and 'Track Application'. Below the header, there are navigation tabs for 'PLANS', 'FUND PERFORMANCE', and 'CLAIMS'. The main content area features a promotional banner for 'ICICI Pru iProtect Smart' with the headline 'DID YOU KNOW THESE 7 THINGS ABOUT OUR TERM PLAN?' and two buttons: 'KNOW MORE' and 'MEET ADVISOR'. A 'Select Role' dropdown menu is open, listing various roles: Customer, Partner Group, Non-Individual (HUF/Partnership), Corporate, Employee Sales, SCB Employee, Employee Branch, ICICI Bank-SP, Advisor, Partner(Corporate Agent/ Brokers), Group Broker, Network Hospital, Former Employee, and IL Employee. Below the banner, there are four service tiles: 'Ask Ligo', 'Buy Now', 'Pay Premium', 'Statements Download', and 'Top Up Now'. A small copyright notice 'WNI/2550/2018-19' is visible in the bottom right corner of the banner area.

Click on **My Profile** you can easily review and update / edit your personal details at any time under this section with us.

Let's start from the top of the section

### 1. Name Update

Click on My Profile → Click on edit option → Enter your new name → Select type of Documents → Click on Icon to upload document → click on update

Enter your new name

**Basic Details**

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Name edit

Agent CompanyMumbai


Important Instructions:

1. Change of Name request will be processed only on receipt of self attested proof of Name.
2. Please upload the relevant Name proof as per the dropdown list available under 'Type of Document'.

New Name\*

Type of documents\*

Select the type of Documents → Click on Icon to upload document → click on update


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MY PROFILE

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New Name\*

Type of documents\*

PAN Card  
 Marriage Certificate  
 Gazatte Certificate


document: 

**Note:**  
 Only JPEG,JPG,PDF,TIFF formats can be uploaded.  
 File size should not exceed 1 MB.

UPDATE
CANCEL

## 2. Updation of bank details

Click on My profile → Click here to update bank details → Download bank mandate form → Click to proceed → Enter verification code → Enter bank details & IFSC code → Upload the Cancel cheque & dully filled bank ECS mandate → Click on submit.



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**DASHBOARD**

Sales Pending	Pending Issuance	Renewal Pending	ACR Pending
Application No	Application Date	Customer Name	Application Status
Requirements			
[Red Dot]			

**RnR Communication** **My Top Plans**



**I want to**

Smart Search Client Diary

iRecommend

Rewards And Recognition

CMS


[View all services](#)

**Alerts & Notifications**

You have 101 leads in the Opp Matrix Renewal Dues module. Click [here](#) to view

You have 48 leads in the Opp Matrix Birthday module. Click [here](#) to view

**ASK ME ANYTHING**


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**MY PROFILE**

**Basic Details**

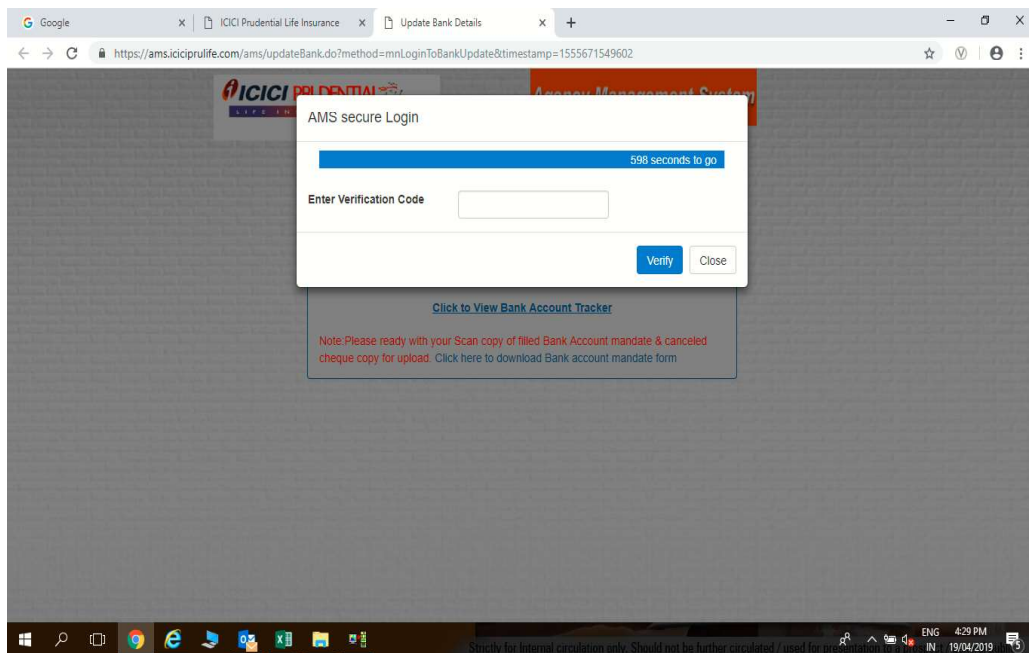
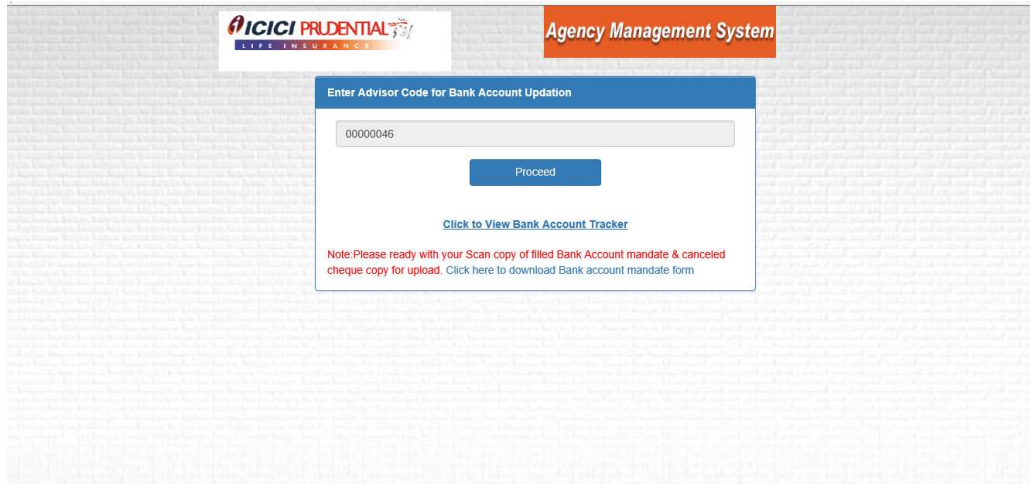
Name <small>edit</small>	DOB	
Agent CompanyMumbai	01-JAN-1982	<a href="#">CLICK HERE TO UPDATE BANK DETAILS</a>

**Contact Details**

Business to provide text incase Official Email id is blank.

Mobile Number <small>edit</small>	E-Mail ID (Personal)	E-Mail ID (Official)
9999999999	-	-
Residential Number	Official Number	State

Click to download bank account mandate form → click to proceed → Enter verification code



Enter Bank details & IFSC code

Set Payout Details for future commissions if any for Advisor Code: 00000995 ( Shilpa Jagdish Raghani )

Name of Account Holder:

Bank Account Number\*:  ReEnter Bank Account Number\*:

IFSC Code:

Bank Name:

Bank Account Type:

I confirm that all the details filled in by me are correct and belongs to the above mentioned advisor code only and advisor has signed the bank account mandate in front of me.

Upload the Cancel cheque and ECS mandate copy

Upload Documents for Advisor Code: 00000995

Cancelled Cheque Upload:

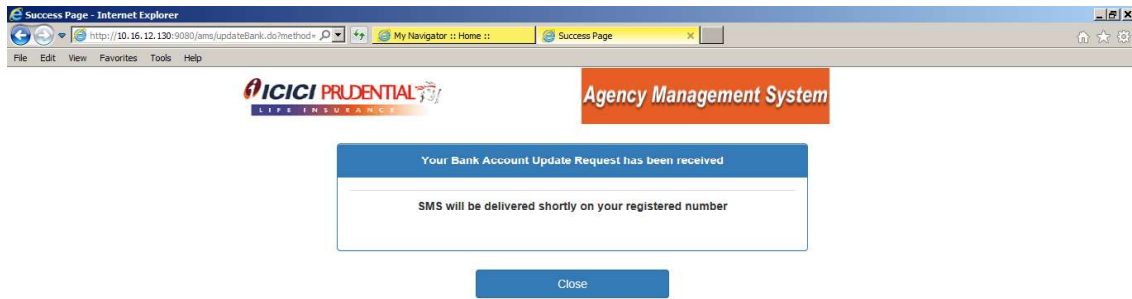
ECS Mandate Upload:

Click to submit

Upload Documents for Advisor Code: 00000995

Cancelled Cheque Upload:

ECS Mandate Upload:



### 3. Advisor contact ( Mob & Address )

#### A. Mobile no. updation

Click on My profile → Click on Edit Mobile number → Enter OPT

(Sent to the register Mobile no) → Enter new mobile number → Click on update

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My Dashboard **My Profile** Our Plans Smart Search Need Analysis Opportunity Matrix

DASHBOARD

Sales Pending	Pending Issuance	Renewal Pending	ACR Pending	
Application No	Application Date	Customer Name	Requirements	Application Status

**I want to**

- Smart Search Client Diary
- iRecommend
- Rewards And Recognition
- CMS

[View all services](#)

**Alerts & Notifications**


- You have 102 leads in the Opp Matrix Renewal Dues module. Click [here](#) to view
- You have 66 leads in the Opp Matrix Birthday module. Click [here](#) to view

**My Top Plans**

Announcing November Power Finishers for all Agency Advisors. Logins: November 26 to November 30, 2018. Issuance: November 26 to December 31, 2018. Give it your best shot and win unlimited Gold Coins and Silver Coins on every counter ( cheque value ) per life logged. All the best. Regards Team RnR. T&C apply. For more details, please click

ASK ME ANYTHING

Waiting for www.iorusalesbeta.com...


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**MY PROFILE**

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**Contact Details**

Business to provide text incase Official Email id is blank.

Mobile Number 9999999999 <a href="#">edit</a>	E-Mail ID (Personal) -	E-Mail ID (Official) -
Residential Number -	Official Number -	State Madhya Pradesh
Address A 30KALANI BAGHINFRONT OF DR PUROHITDEWAS <a href="#">edit</a>	City DEWAS	Pincode 455001


**Additional Information Section**

[https://www.iprusalesbeta.com/digiuatnew/ps\\_clientProfileDetails.htm?execution=e4s1#](https://www.iprusalesbeta.com/digiuatnew/ps_clientProfileDetails.htm?execution=e4s1#)

### Enter OTP sent to the register mail ID

ICICI Prudential Life Insurance x +

← → ↻ [https://www.iprusalesbeta.com/digiuatnew/ps\\_clientProfileDetails.htm?execution=e4s1](https://www.iprusalesbeta.com/digiuatnew/ps_clientProfileDetails.htm?execution=e4s1) ☆ ⌵ ⌵ ⌵


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**MY PROFILE**

**Agent Mobile Number Validation** ✕

Enter OTP\*

OTP will be sent to your registered Mobile Number. In case you are not able to receive OTP, please update your Mobile Number through E-Mail/Call us/Branch Visit.

**Basic Details**

Name  
Agent CompanyMumbai

**Contact Details**

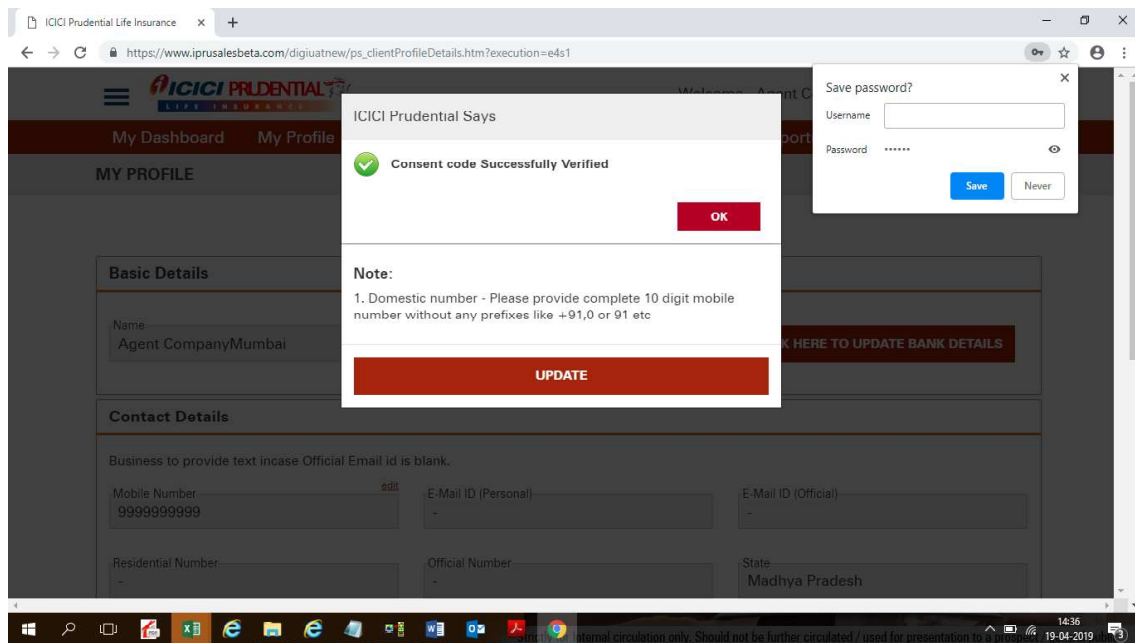
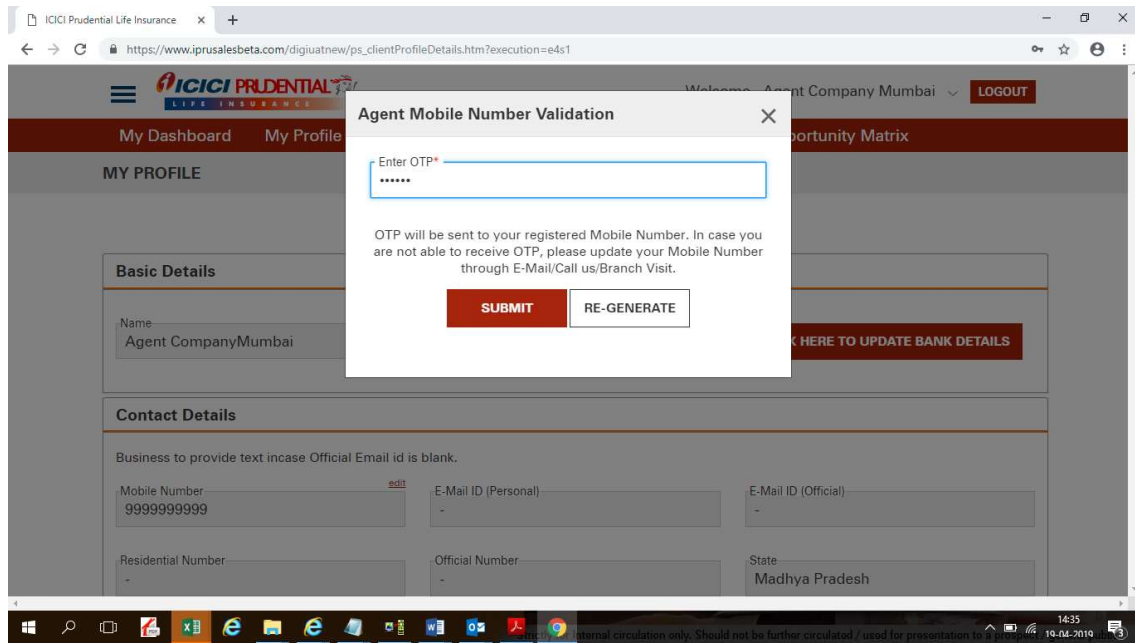
Business to provide text incase Official Email id is blank.

Mobile Number 9999999999 <a href="#">edit</a>	E-Mail ID (Personal) -	E-Mail ID (Official) -
Residential Number -	Official Number -	State Madhya Pradesh

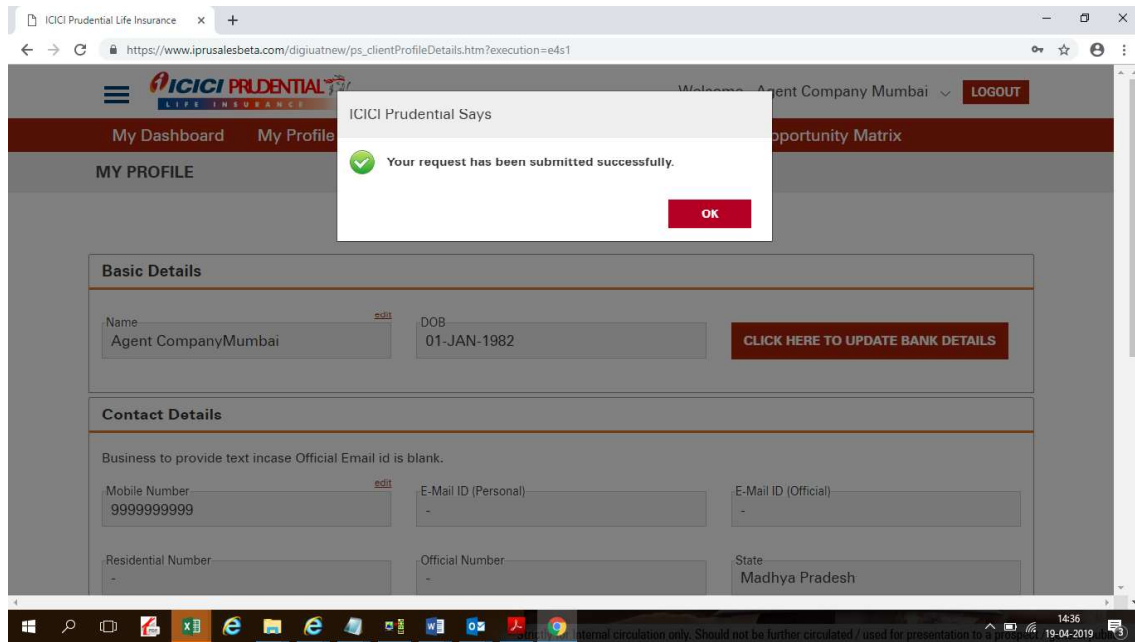
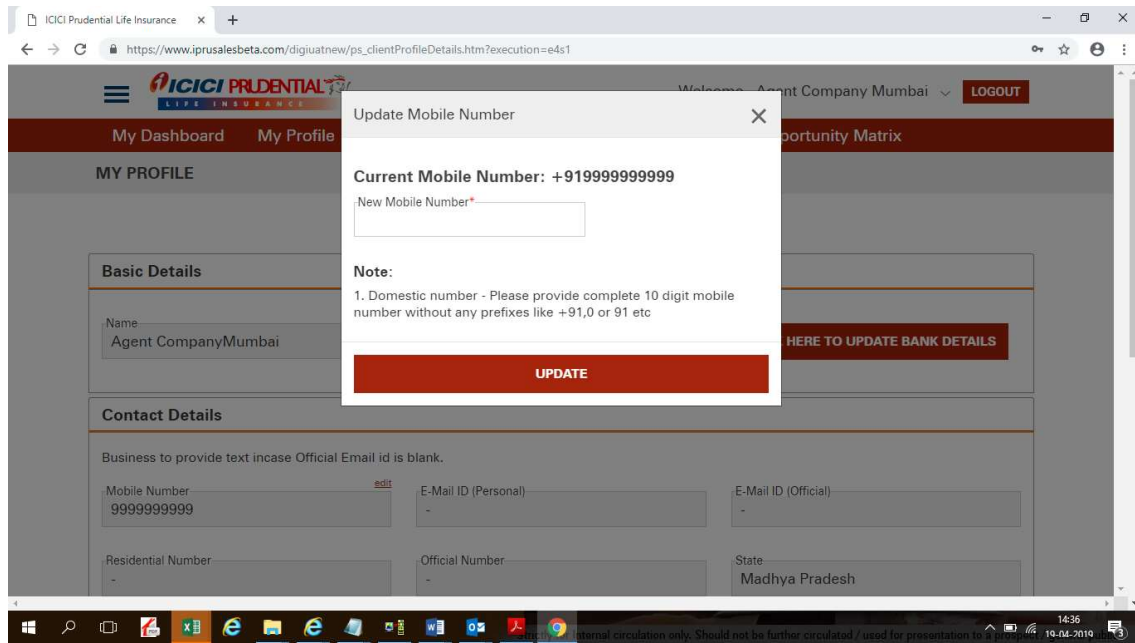
[HERE TO UPDATE BANK DETAILS](#)

14:35 19-04-2019





Update New Mobile Number → Click on update



## B. Address update

Click on My Profile → Click on edit option → Enter new address → Select types of documents to be uploaded → Click the icon to upload document → click on update

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**MY PROFILE**

Address edit  
A 30KALANI BAGHINFRONT OF DR PUROHITDEWAS

City  
DEWAS

Pincode  
455001

Important Instructions:  
1. Change of address request will be processed only on receipt of self attested proof of address.  
2. Please upload the relevant address proof as per the dropdown list available under 'Type of Document'.

New Address\*

Type of documents\*

Please select Document type

Click the icon to upload document :

Select types of documents to be uploaded → click the icon to upload document → click to update

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**MY PROFILE**


Type of documents\*

- Bank Statement which is not more than 3 months old
- Copy of the PF/PPF statements
- ESIS CARDS
- Employers Certificates
- House Allotment Letter
- Passport
- Permanent Driving License
- Ration Card
- Utility Bill - Water, Gas, Telephone
- Voters ID
- Aadhaar Card

UPDATE CANCEL

#### 4. GST update

Click on edit option → Enter GSTIN number → Click the icon to upload document → click on update.


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My Profile
Our Plans
Smart Search
Need Analysis
Opportunity Matrix


**MY PROFILE**

Important Instructions:

1. Change of GSTIN Number request will be processed only on receipt of self attested proof of GSTIN Number.

GSTIN Number

Please Enter New Gstin Number


Click the icon to upload document : 

**Note:**  
Only JPEG, JPG, PDF, JIF formats can be uploaded.  
File size should not exceed 1 MB.

UPDATE
CANCEL

## 5. Welcome – Kit

Download Welcome kit option is given just simply click on DOWNLOAD WELCOME –KIT


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My Profile
Our Plans
Smart Search
Need Analysis
Opportunity Matrix

**MY PROFILE**

**Additional Information Section**

PAN Number -	Aadhaar Number -	Date of Appointment 12-DEC-2000
Date of License Expiry -	GSTIN Number <span style="float: right;"><a href="#">edit</a></span> -	

**Welcome-Kit**

DOWNLOAD WELCOME-KIT