

Annexure-III

iTrex Help File

iTrex website details:

itrex Live URL: <https://www.itrex.in>

itrex Live service URL: <https://www.itrex.in/cisservice>

itrex test URL: <https://www.itrex.in/itrextest>

itrex Test service URL: <https://www.itrex.in/itrextestservice>

sIA Upload in Itrex

1. Uploading sIA Data using services



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The Web Service details are mentioned below:

Sl. No.	Web Method	Description	Input Parameters	Output
1	InsertsIAData	To insert KYC data/sIA Generation	Input Parameters : eIANo, CustomerID, PolicyNo, CustomerFName, CustomerMName, CustomerLName, CustomerFatherFName, CustomerFatherMName, CustomerFatherLName, PAN, UID, Passport, DOB, NatureOfIdProof, IDDocRefNo, AddressDocRefNo, AddressLine1, AddressLine2, AddressLine3, Place, Pin, State, Country, NatureAddressProof, Email, Mobile, KYC_Compliant, KYC_Date	Byte Array - returns sIA, Upload Status (Success/Failure with Remarks)
2	InsertsIADataCD	To insert KYC data/sIA Generation which are conflicted	Input Parameters : eIANo, CustomerID, PolicyNo, CustomerFName, CustomerMName, CustomerLName, CustomerFatherFName, CustomerFatherMName, CustomerFatherLName, PAN, UID, Passport, DOB, NatureOfIdProof, IDDocRefNo, AddressDocRefNo, AddressLine1, AddressLine2, AddressLine3, Place, Pin, State, Country, NatureAddressProof, Email, Mobile, KYC_Compliant, KYC_Date, Conflicted_sIA	Byte Array - returns sIA, Upload Status (Success/Failure with Remarks)
3	sIAQuery	To Query sIA from CIS	Input Parameters PAN, UID, CustomerName, sIANo, eIANo, Mobile, Email, Passport Pass any one parameter and others can be empty.	Byte Array - returns the result from the Database.
4	BulksIAQuery	To bulk Query sIA from CIS	The input parameters should be sent as described in the sample file in the Application	Byte Array - returns the result from the Database.
5	InsertsIAPolicyData	To Tag policies for the already generated sIA	Input Parameters : sIANo, PolicyNo, Policy_Status	Byte Array - returns the result from the Database.
6	sIADataUpdate	To Update the data of the sIA whose KYC is already done.	Input Parameters : sIANo, eIANo, CustomerID, PolicyNo, CustomerFName, CustomerMName, CustomerLName, CustomerFatherFName, CustomerFatherMName, CustomerFatherLName, PAN, UID, Passport, DOB, NatureOfIdProof, IDDocRefNo, AddressDocRefNo, AddressLine1, AddressLine2, AddressLine3, Place, Pin, State, Country, NatureAddressProof, Email, Mobile, KYC_Compliant, KYC_Date, Conflicted_sIA	Byte Array - returns sIA, Upload Status (Success/Failure with Remarks)

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2. Uploading sIA Data using web upload

To: iTrex

File Type: sIA

No. of Records: 7

Content File: Choose File sIABulkCSV.csv

Upload

3. Uploading sIA Data using SFTP

a. Extract the data in the .CSV format.

b. File name should be DateTimeStamp_insurercode.csv

for eg: ddmmyyhhmmss_12.csv

where , ddmmyyhhmmss is the datetimestamp and 12 is the insurer code and .csv is the file type.

c. The files should be kept in SFTP folder which will be accessed after getting credentials from the itrex Team.

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4. Uploading sIA Data using Offline Method

- a. Extract the data in the .CSV format.
- b. File name should be DateTimeStamp_insurercode.csv

for eg: ddmmyyhhmmss_12.csv

where , ddmmyyhhmmss is the datetimestamp and 12 is the insurer code and .csv is the file type.

- c. The file can be given in a hard disc with password protection or in an optical disc with password protection and can be handed over to IRDA/IIB itrex Team.

5. File Nomenclature:

File name should be DateTimeStamp_InsurerCode.csv

for eg: ddmmyyhhmmss_15.csv

- a. ddmmyyhhmmss =Date Time Stamp
- b. 15= Insurer Code
- c .csv =File extension/File format type.

6. Response File:

For the initial sIA bulk offline/SFTP upload, the response file can be downloaded from the SFTP/Offline access. The response format is as follows:

CustomerID,PolicyNo, CustomerFName, CustomerMName, CustomerLName, ValidationRemarks

