

Agent bulk upload

Please find the below process flow for uploading agents in bulk through canvas.

In order to upload the agent through canvas, agent upload file should be in proper format and it must be validated after using agent MDM validator refer the link

<https://www.npci.org.in/what-we-do/bharat-billpay/notified-documents>
[BBPOU-Agent MDM Validator \(Download the same\).](#)

- Login in canvas
- Select “**onboarding**”__ **Bulk Upload**
- At the time of upload take a below precautions:-

Filed Name clarification for some fields

- Is Dummy(Electronic)*-‘ YES’ (Applicable to Electronic channel) for other ‘NO’
- Address 1 – Max 200 words
- Address 2,3- Max 100 Words
- Latitude & Longitude- Before 2 Decimal and after Decimal 4 digit eg. 29.1354
- Effective Form Date- YYYYMMDD eg. 20200911
- Effective To Date- YYYYMMDD (Advisable to keep blank, from this date txn will get decline)
- There should not be any special character such as .,/,;”(){}[]!~` -_> < in ‘city’ & ‘Agent Reference Id’

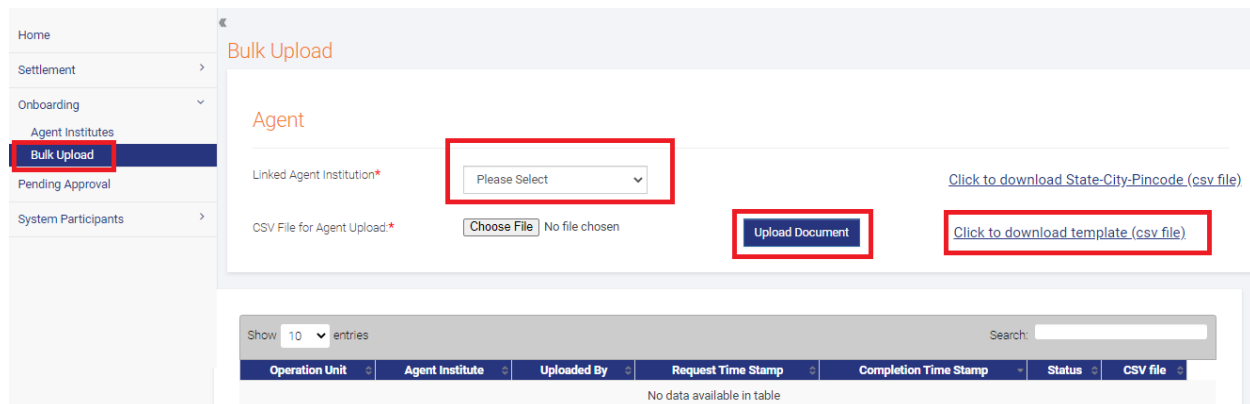
Steps to upload

- 1) Select Bulk upload
- 2) Select Linked Agent Institution
- 3) Download [Click to download template \(csv file\)](#) Sample file shown below with eg.



SampleFileForAgent.csv

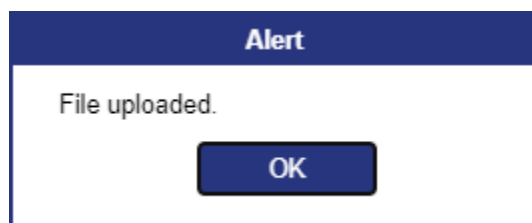
- 4) Paste data into above file make ensure that you will upload file after using validate agent MDM validator. (Refer Filed Name clarification for some fields)
- 5) Choose file from save path (At the time of upload keel the file open don't close the file)



The screenshot shows the 'Bulk Upload' page in a web application. On the left is a navigation menu with 'Bulk Upload' highlighted. The main content area has a title 'Bulk Upload' and a sub-section 'Agent'. There are two required fields: 'Linked Agent Institution*' with a dropdown menu showing 'Please Select', and 'CSV File for Agent Upload:*' with a 'Choose File' button. Below the 'Choose File' button is the text 'No file chosen'. To the right of these fields are two links: 'Click to download State-City-Pincode (csv file)' and 'Click to download template (csv file)'. Below the form is a table with columns: 'Operation Unit', 'Agent Institute', 'Uploaded By', 'Request Time Stamp', 'Completion Time Stamp', 'Status', and 'CSV file'. The table is currently empty, showing 'No data available in table'. There are also 'Show 10 entries' and 'Search:' options above the table.

6) Click on Upload document

7) You will get pop screen as File uploaded



8) On successful upload you can get file on below link. Click in csv file to get output.

BBPOU*

Linked Agent Institution* [Click to download State-City-Pincode \(csv file\)](#)

Bulk Approve

CSV File for Agent Upload* No file chosen [Click to download template \(csv file\)](#)

tion Unit	Agent Institute	Uploaded By	Request Time Stamp	Completion Time Stamp	Status	CSV file
E SERVICES INDIA LIMITED)	CS02(CSC e-Governance Services India Limited)	bbcu_amojag	11/09/2020 18:05:23	11/09/2020 18:06:11	Completed	AgentUploadStatus18498497242357824.csv

9) Output File will look like below

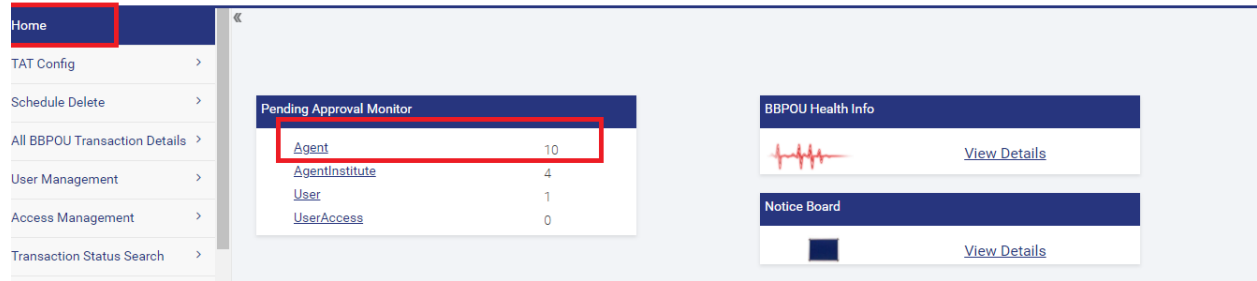


Note: - **Request you to upload Max 1000 records only.** Here is the maker checker concept. Ask verifier to approve the agents.

If you have more than 1000 agents upload 1st, 1000 Agents get it approve, then upload remaining in the batch of 1000

Flow for Verifier as under

- Login in canvas
- Select on Agent count as mentioned below

A screenshot of the Bharat Billpay web application interface. On the left is a navigation menu with items like 'Home', 'TAT Config', 'Schedule Delete', 'All BBPOU Transaction Details', 'User Management', 'Access Management', and 'Transaction Status Search'. The main content area is titled 'Pending Approval Monitor' and contains a table with the following data:

Category	Count
<u>Agent</u>	10
<u>AgentInstitute</u>	4
<u>User</u>	1
<u>UserAccess</u>	0

The 'Agent' row is highlighted with a red box. To the right of the table are two summary cards: 'BBPOU Health Info' with a 'View Details' link and a pulse icon, and 'Notice Board' with a 'View Details' link and a small blue square icon.

Click on agent then below screen will come. Select all and click on bulk approve. Then all the records will get approve

Show | Page | entries Search:

<input checked="" type="checkbox"/>	Agent ID	Business Entity Name	Business Type	Institution ID	Is Bulk	Mobile	Creation Date	Status
<input checked="" type="checkbox"/>	CC01IA95AGTU00000001	LOVE MISHRA	Recharge Portal	IA95	Yes	9905276368	08/09/2020	PENDING_ACTIVATION
<input checked="" type="checkbox"/>	CC01IA95AGTU00000002	RAKESH KUMAR	Recharge Portal	IA95	Yes	7338850362	08/09/2020	PENDING_ACTIVATION
<input checked="" type="checkbox"/>	CC01IA95AGTU00000003	VINAYAK AMBBANI	Recharge Portal	IA95	Yes	9122200415	08/09/2020	PENDING_ACTIVATION
<input checked="" type="checkbox"/>	CC01IA95AGTU00000004	SAROJ KUMAR SINHA	Recharge Portal	IA95	Yes	9525648499	08/09/2020	PENDING_ACTIVATION
<input checked="" type="checkbox"/>	CC01IA95AGTU00000005	RINKU KUMARI	Recharge Portal	IA95	Yes	9334468614	08/09/2020	PENDING_ACTIVATION
<input checked="" type="checkbox"/>	CC01IA95AGTU00000006	RAKESH KUMAR	Recharge Portal	IA95	Yes	9334468611	08/09/2020	PENDING_ACTIVATION
<input checked="" type="checkbox"/>	CC01IA95AGTU00000007	ALOK KUMAR	Recharge Portal	IA95	Yes	9905276368	08/09/2020	PENDING_ACTIVATION
<input checked="" type="checkbox"/>	CC01IA95AGTU00000008	RAKESH KUMAR	Recharge Portal	IA95	Yes	9334468613	08/09/2020	PENDING_ACTIVATION
<input checked="" type="checkbox"/>	CC01IA95AGTU00000009	UTTAM DAS	Recharge Portal	IA95	Yes	7992261037	08/09/2020	PENDING_ACTIVATION
<input checked="" type="checkbox"/>	CC01IA95AGTU00000010	AJEET KUMAR	Recharge Portal	IA95	Yes	9835559559	08/09/2020	PENDING_ACTIVATION

Showing 1 to 10 of 10 entries

First Previous 1 Next Last

View Bulk Approve

- Once verifier approve then only agents will get Activate. Till the time it will remain in pending for approval.