



IIA Group Admin Portal User Guide

Renew Group Membership

This step-by-step guide provides instructions for renewing your organization's group membership.

Checklist For Completing Group Renewal

A step-by-step instructional guide is provided on the following pages to complete the checklist.

- Log into the [admin portal](#)
- Review “Account Roster”
 - a. [Remove non-renewing members](#)
 - b. [Add new individuals to roster](#)
 - c. [Calculate number of slots for renewal purchase](#)
- Create an order and complete payment
 - i. [Create a quote - Optional](#)
 - ii. [Convert quote to an order and complete payment](#)
 - iii. [Create an order and pay by credit card](#)
 - iv. [Create an order and pay by check/wire/ach](#)
- [Assign membership slots](#)

Review Account Roster

Remove non-renewing members

****Note:** Removing an individual from the group before expiration will terminate their member benefits immediately.

1. On the dashboard, click on **Manage Slots** located under “Group Membership”.
2. Identify the member you wish to remove from the assigned slots list and click the **Vacate** button next to their information.



| VACATE | GAN | EXECUTIVE LEVEL | FIRST NAME |
|--------|---------|-----------------|------------|
| Vacate | 1651361 | None | Julie |
| Vacate | 3216200 | None | Cristina |

3. Navigate back to the dashboard and click on **Account Roster** under Account Management.
4. Locate the individual on the list and click **Delete**, located on the right-hand side of page of line to remove them from your roster.



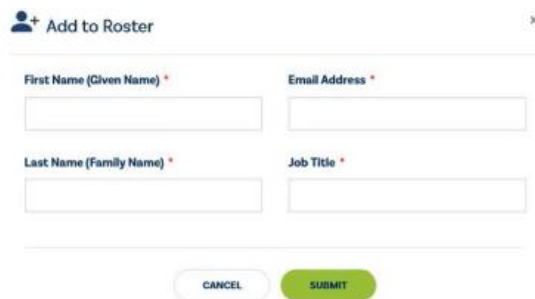
| | | | | | | | |
|---------|----------|---------|--------------|---|--------|-----------|-------------------------------|
| 3216200 | Cristina | Almeida | IIA HQ Staff | N | Active | 8/18/2022 | Edit / Delete |
|---------|----------|---------|--------------|---|--------|-----------|-------------------------------|

Important Reminder: Once the slot has been vacated, that slot cannot be re-used for another person.

Add new individuals to the roster

This instruction guide is recommended for submitting one individual at a time. Have a handful of new additions? [Check out the “How to add individuals to the roster – bulk upload”.](#)

1. On the dashboard, navigate to Account Management and click on **Account Roster**.
2. Click on the green **Add to Roster** button. The below will appear.



The screenshot shows a modal window titled "Add to Roster" with a close button (X) in the top right corner. The form contains four required text input fields arranged in a 2x2 grid. The top row has "First Name (Given Name) *" and "Email Address *". The bottom row has "Last Name (Family Name) *" and "Job Title *". Below the form are two buttons: a white "CANCEL" button and a green "SUBMIT" button.

3. Complete the required fields with the individual's information.
4. Click **Submit**.

Important Note: Please verify if the individual has held a previous membership; and if yes, confirm the existing primary email on their account. If they are registered with a different email, the system will create a new profile and will **NOT** link their certifications and membership history.

If a team-member reports having two profiles, direct them to email CustomerRelations@theiia.org for an account merge request.

Calculate # of slots for renewal purchase

After you have vacated and added the desired individuals to your current roster, please review again to ensure that there are no individuals listed that are no longer with your group to prevent accidentally assigning a slot to them.

Create An Order and Complete Payment

Create a quote - Optional

1. On the [admin portal](#) dashboard, click **Manage Slots** under Group Membership.
2. Click the green **Renew Slots** button.



3. Confirm # of desired slots and add to cart.
4. Proceed with checkout and agree to terms and click checkout again.
5. Click the blue **Additional Options** button.



| | |
|---|---------------------|
| 2 | Payment method |
| 3 | Payment information |
| 4 | Confirm order |

6. Agree to terms and conditions and click the green **Place Quote** button.

Quote terms and conditions

Customers may create and download a quote without committing to pay for the order. Quotes expire after 60 days. Customers may return to the quote and convert it into an invoice for payment (i.e., Pending Order) within the 60-day Quote period. After converting a quote to a pending order, the customer will have the remainder of the original 60-day period to post payment. A new quote can be created at any time.

By clicking here, I state that I have read and understood the terms and conditions.

Back Place Quote

A blue arrow points to the green 'Place Quote' button.

7. You may print a PDF copy of the quote by clicking on the link.

Convert quote to order and complete payment

To complete payment for a quote, complete the following steps:

1. Navigate to the dashboard and click on **View Quotes** under Store.

Note: Please ensure you are on the correct account when in the Store. You can change from individual view to group view by clicking the down caret under the “Welcome” on the top-right hand side of the webpage to select the group name.

MY ACCOUNT | SHOPPING CART (0) | SIGN OUT | INDIVIDUAL Welcome, Julie ▼

INDIVIDUAL
THE INSTITUTE OF INTERNAL AUDITORS HQ 

2. Locate your transaction and click **Details** on the right of the page.
3. Click the green **Place Order** button.
4. Proceed with one of the payment options.

Note: Membership slots are available upon completion of payment. If check, wire, or ach are selecting, the membership slots will become available once payment has been received at IIA Headquarters and processed by the Accounting Department

Create an order and submit payment by credit card

1. On the [admin portal](#) dashboard, click **Manage Slots**.
2. Click the green **Renew Slots** button.



3. Confirm # of desired slots and add to cart.
4. Proceed with checkout online with credit card payment for same day renewal.
5. Once payment is completed, the membership slots will be available and **MUST** be assigned to your members for the new term dates.

Please allow up to 5 minutes for the new term dates and membership slots to reflect in the Admin Portal.

Create an order and complete payment via wire transfer, ACH or check

1. On the [admin portal](#) dashboard, click **Manage Slots**.
2. Click **Renew Slots**.



3. Confirm # of desired slots and add to cart. Proceed with checkout through portal.
4. Select a form of payment (Wire Transfer/ACH or Check).
For check payments, please use the following:
Truist Bank, Inc.
PO Box 919460
Orlando, FL 32891-9460
Acct: 1000145155502 Routing: 061000104
For wire transfers and ACH payments, please use the following:
Truist Bank, Inc.
303 East Peachtree St
Atlanta, GA 30308
Account: 1000145155502 Routing: 061000104
SWIFT: SNTRUS3A
5. Once payment has been submitted, please email a copy of the remittance advice and/or payment receipt along with a copy of the order to wirepayments@theiia.org.
NOTE: Please allow up to 14 business days for your payment to be processed and applied to your account. You will receive an email once payment has been applied to the order by our Accounting department.
6. Once payment is completed, the membership slots will be available and **MUST** be assigned to your members for the new term dates.

Assign Membership Slots

1. Log into the [admin portal](#)
2. Click on **Manage Slots** under Group Membership.
3. Scroll down on the page to Roster and click the radio button next to the name of the individual(s).
4. Click “Assign Slot”.

ASSIGN SLOT

| ASSIGN | GAN | FIRST NAME |
|--------------------------|---------|------------|
| <input type="checkbox"/> | 1651361 | Julie |
| <input type="checkbox"/> | 3216200 | Cristina |