



# IIA Group Admin Portal User Guide

## Set Up A New Group Membership

This step-by-step guide provides instructions for purchasing group membership slots and enrolling your team members through the [Admin Portal](#).

*This instructional guide is for group administrators who have submitted their organization's information through the [Group Services Inquiry](#).*

## Checklist For Completing A New Group Membership

*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. [Add new individuals to roster](#)
  - b. [Remove individual from roster](#)
  - c. [Calculate number of slots for membership 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

Please review and confirm the individuals on the roster. Should you need to make changes, use the instructions below.

### **Add new individuals to the roster**

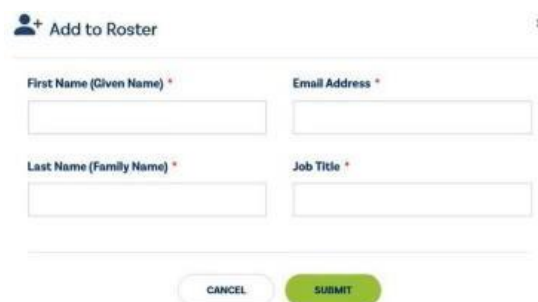
*This instruction guide is recommended for submitting one individual at a time. Have a handful of new additions? Check out the “How to add individuals to the roster – bulk upload.”*

1. On the dashboard, navigate to “Account Management” and click on **Account Roster**.

**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](mailto:CustomerRelations@theiia.org) for an account merge request.

2. Click on the green **Add to Roster** button. The below will appear.



The screenshot shows a form 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:

- Top-left: "First Name (Given Name) \*"
- Top-right: "Email Address \*"
- Bottom-left: "Last Name (Family Name) \*"
- Bottom-right: "Job Title \*"

At the bottom of 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**.

### Remove an individual from the roster

1. On the dashboard, click on **Account Roster** under “Account Management”.
2. 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	<a href="#">Edit / Delete</a>
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**Important Reminder:** *If a membership has been assigned, the slot must be vacated before you can remove the individual. That slot cannot be re-used for another person.*

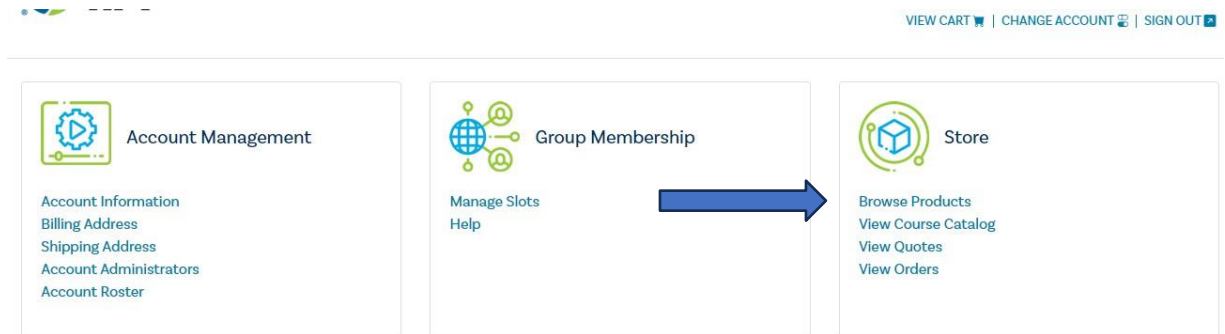
### Calculate # of slots for renewal purchase

Review your roster to calculate the number of slots needed in your group membership purchase.

## Create An Order and Complete Payment

### Create a quote - Optional

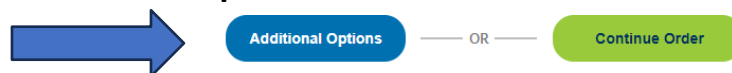
1. Log into the [Admin Portal](#) with your individual credentials. On the dashboard (home page), click on **Browse Products** located under “Store”.



2. You may filter by product type by selecting the drop downs under “Category” and “Subcategory.” Select **Membership** under “Category”.



3. Select number of Slots under “Subcategory” then click on **Add to Cart**.
4. Enter quantity and then **Submit**.
5. Proceed with checkout, agree to terms, and click checkout again.
6. Click the blue **Additional Options** button.



2	Payment method
3	Payment information
4	Confirm order


## 7. 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](#)



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

*Note: Payment cannot be applied to a quote; You will need to convert the quote to an order first.*

### **Convert quote to order and complete payment**

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

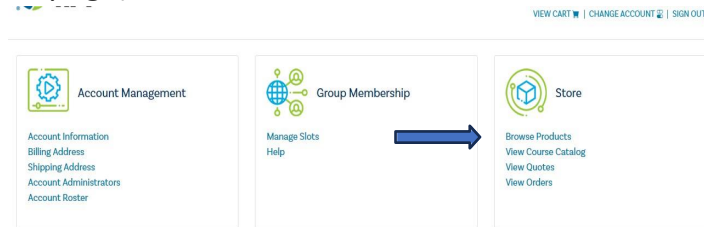
1. Navigate to the dashboard and click on **View Quotes** under “Store”.  
Please ensure you are on the correct account when in the Store. You can change from individual view to group view by clicking the down caret under the “Welcome” on the top-right hand side of the webpage to select the group name.



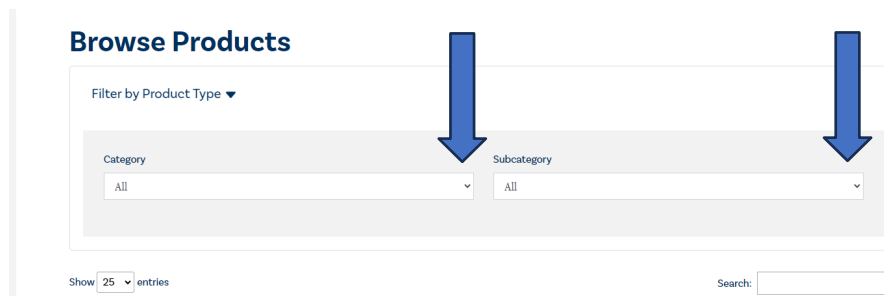
2. Locate your transaction and click **Details** on the right of the page.
3. Click the green **Place Order** button.
4. Proceed with one of the payment options.  
Membership slots are available upon completion of payment. If check, wire, or ACH are selected, the membership slots will become available once payment has been received at IIA Headquarters and processed by the Accounting Department

### Create an order and submit payment by credit card

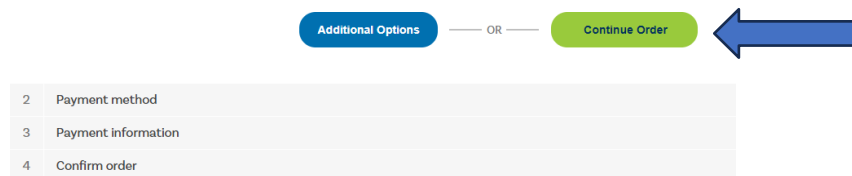
1. Log into the [Admin Portal](#) with your individual credentials. On the dashboard (home page), click on **Browse Products** located under Store.



2. You may filter by product type by selecting the drop downs under “Category” and “Subcategory”. Select **Membership** under “Category”.



3. Select slot type under “Subcategory” (Member Slot/Public Sector Slot).
  4. Enter the number of slots and click on **Add to Cart**.
  5. Enter quantity and then **Submit**.
- Note: This option only appears when you are purchasing a product such as a book.*
6. Proceed with checkout, agree to terms, and click checkout again.
  7. Click on green **Continue Order** button

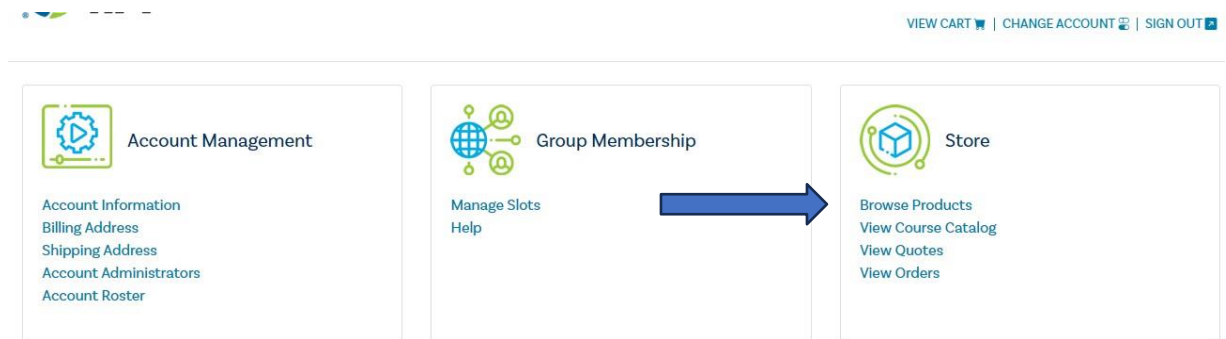


8. Proceed with checkout online with credit card for same day activation.
9. Once payment is completed, the membership slots will be available and **MUST** be [ASSIGNED](#) to your members for the new term dates.

*Please allow up to 5 minutes for the term dates and membership slots to reflect in the Admin Portal. You may need to refresh your browser to see the slots populate.*

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

1. Log into the [Admin Portal](#) with your individual credentials. On the dashboard (home page), click on **Browse Products** located under “Store.”



2. You may filter by product type by selecting the drop downs under “Category” and “Subcategory.” Select Membership under **Category**.



3. Select type under **Subcategory** (Member Slot/Public Sector Slot)
4. Enter the number of slots and click on **Add to Cart**.
5. Enter quantity and then **Submit**.

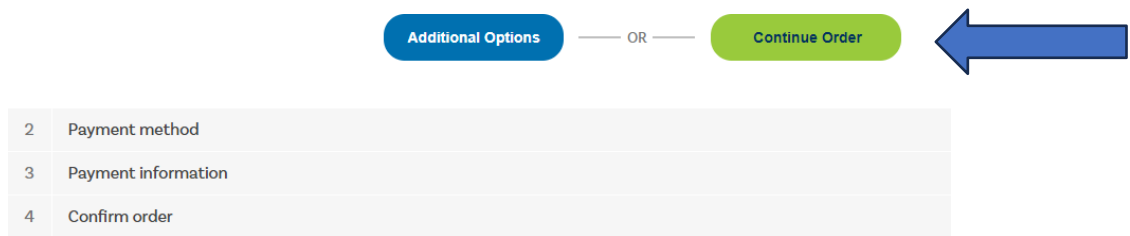
*Note: This option only appears when you are purchasing a product such as a book.*

6. Proceed with checkout, agree to terms, and click checkout again.

*Instructions continued on next page.*



7. Click on green **Continue Order** button.



Select a form of payment (Wire Transfer/ACH or Check).

*Note: A \$20 fee will be added for the wire transfer option*

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

1. 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](mailto: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.

2. Once payment is completed, the membership slots will be available and **MUST** be [ASSIGNED](#) to your members.

**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**.