



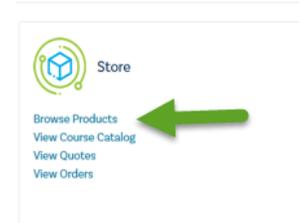
# IIA Group Admin Portal User Guide

## Purchase A Group Registration

This step-by-step guide provides instructions for purchasing group registrations for training, events, and conferences through the Store in the [Admin Portal](#).

## Group Registration Purchase

1. Log into the [Admin Portal](#). 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.”

A screenshot of the 'Browse Products' page. The title 'Browse Products' is at the top. Below it is a 'Filter by Product Type' section with a dropdown arrow. Underneath, there are two dropdown menus: 'Category' and 'Subcategory', both currently set to 'All'. At the bottom left, there is a 'Show 25 entries' option, and at the bottom right, there is a search box labeled 'Search:'.

3. Select the desired product and click on **Add to Cart**.
4. Enter quantity and then **Submit**.  
*Note: This option only appears when you are purchasing a product such as a book.*
5. For registrations, your organization’s roster will appear. Click the box on the left side of the screen next to each person’s name on the roster you wish to include in the purchase.
6. Click the green **ADD TO CART** button.
7. Continue with checkout to place quote and/or purchase.

## Create an Order and Complete Payment

### Create a quote - Optional

1. Once you have everything in your cart, click **Checkout**.
2. Under Order Summary, click the agree to terms and **Checkout**.
3. From there you may proceed with a quote by clicking on **Additional Options** (see below instructions) or **Continue Order** to proceed with payment.
4. To place quote, click the blue **Additional Options** button.



2	Payment method
3	Payment information
4	Confirm order

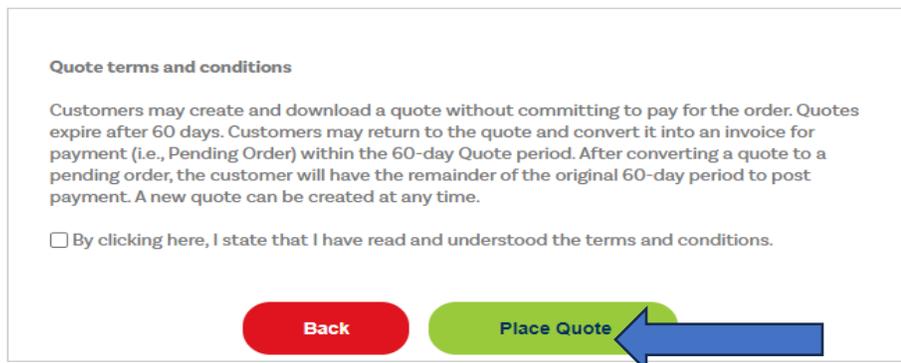
5. Agree to terms and conditions and click the green **Place Quote** button.

**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 screenshot of a form titled "Quote terms and conditions". It contains a paragraph of text explaining the quote process, a checkbox for agreeing to terms, and two buttons: a red "Back" button and a green "Place Quote" button. A blue arrow points to the "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 in 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.

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

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 by clicking the desired payment option. *Note: A \$20 fee will be added for the wire transfer option.*

Checkout

1	Billing address
2	Payment method

ACH       Check/Money Order       Wire Transfer (\$20.00)

Credit Card/PayPal

[Back](#)

[Continue](#)

3	Payment information
4	Confirm order

## Submit payment by credit card

1. Select the Credit Card/PayPal option.
2. Enter card information and click **Pay**.
3. Confirm order.

*Continue to next page for wire transfer, ACH, & check payment instructions.*

**Submit payment via wire transfer, ACH, or check**

1. 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

2. 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. If remitting payment by check, please include the order number on your check/money order and include a copy of the order with your remittance.***

***Important Reminder:*** Registrations are NOT complete for your team until payment is received and applied. Please ensure a copy of the remittance advice and/or payment receipt along with a copy of the order is emailed to [wirepayments@theiia.org](mailto:wirepayments@theiia.org).