



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 <u>admin portal</u>
- Review "Account Roster"
 - a. <u>Remove non-renewing members</u>
 - b. Add new individuals to roster
 - c. <u>Calculate number of slots for renewal purchase</u>
- Create an order and complete payment
 - i. <u>Create a quote Optional</u>
 - 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
- O 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.



- 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	Ν	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? <u>Check out the "How to add individuals to the roster – bulk upload".</u>

- 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.

First Name (Civen Name) *	Email Address *	
Last Name (Family Name) *	Job Title *	

- 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 <u>CustomerRelations@iiacustomersupport.org</u> 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 <u>admin portal</u> 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.

		Additional Options	OR	Continue Order
2	Payment method			
3	Payment information			
4	Confirm order			

6. Agree to terms and conditions and click 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:

 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.



		Welcome, Julie
MY ACCOUNT SHOPPING CART (0) SIGN OUT	INDIVIDUAL	~
	INDIVIDUAL THE INSTITUTE OF INTER	

- 2. Locate your transaction and click **Details** on the right of the page.
- 3. Click the green **Place Order** button.
- 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.

Membership Term: 27/Oct/2021 - 12/Mar/2022





- 3. Confirm # of desired slots and add to cart.
- 4. Proceed with checkout online with credit card payment for same day renewal.
- Once payment is completed, the membership slots will be available and <u>MUST</u> 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 <u>admin portal</u> dashboard, click **Manage Slots**.
- 2. Click Renew Slots.

Membership Term: 27/Oct/2021 - 12/Mar/2022
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.

 Once payment is completed, the membership slots will be available and <u>MUST</u> 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 individuals(s).
- 4. Click "Assign Slot".

