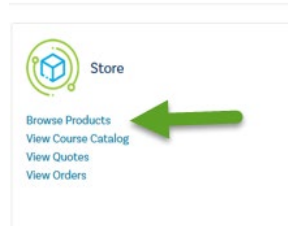
The Institute of Internal Auditors

IIA Group Admin Portal User Manual

Purchase A Group Registration

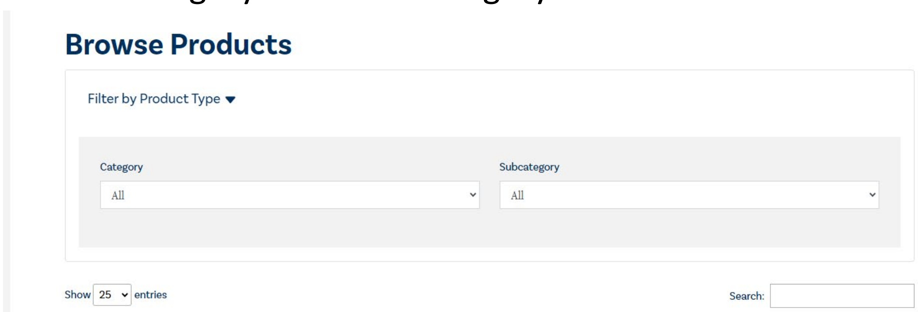
This step-by-step guide provides instructions for purchasing group registrations for training, events, and conferences through the Store in the Admin Portal.

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."



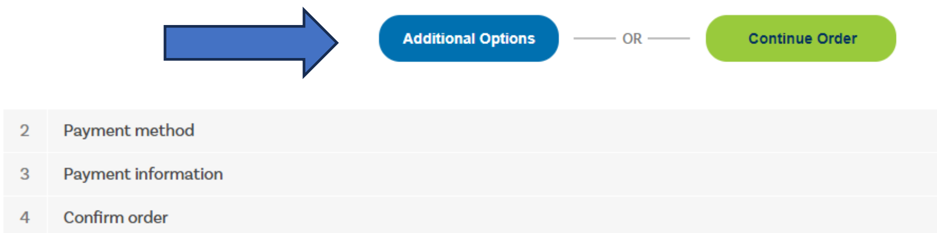
3. Select the desired product and click on **Add to Cart**.
4. Enter quantity and then **Submit**.
   Note: This option only appears when you are purchasing a product such as a book.

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.

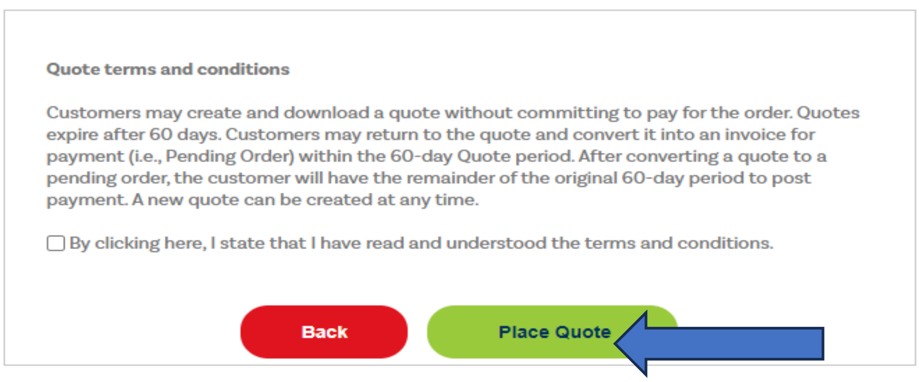
Create an Order and Complete Payment

<u>Create a quote - Optional</u>

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.



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



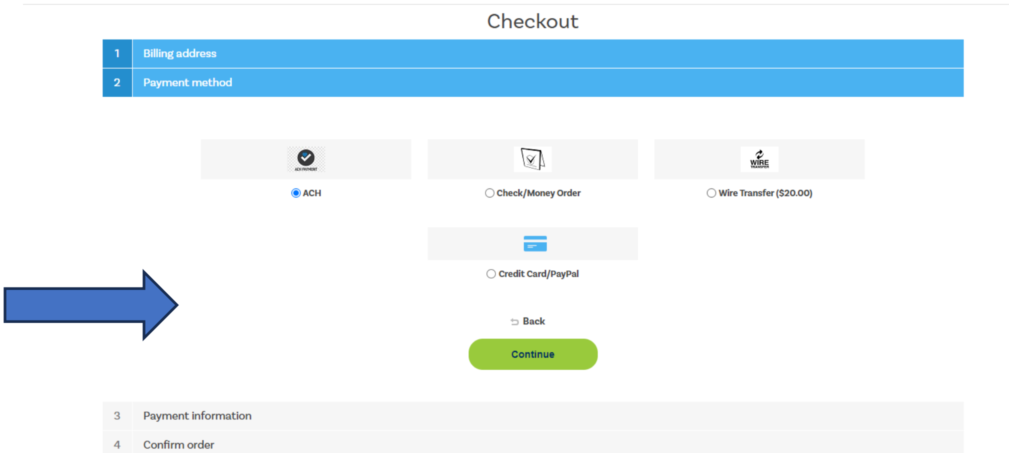
7. You may print a PDF copy of the quote by clicking on the link.

Convert quote to order and complete payment

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

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.

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*.



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.

<u>Submit payment via wire transfer, ACH, or check</u>

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.
   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.*