



The Institute of
Internal Auditors

IIA Group Admin Portal User Guide

STORE

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Overview

This is a guide of how to successfully use the store through the IIA Group Admin Portal. It will provide instructions on how to browse products, obtain quotes, place orders, and request a refund.

Authorized User Permission

Only individuals with the Group Admin role for the Organization Account have access to the IIA Admin Portal.

To inquire about establishing a new IIA Group account or become a Group Admin for your organization, please complete the [Group Services Inquiry Form](#).

Technical Requirements

In order to have an optimal experience while using the Admin Portal, you will need to adhere to the following browser and operating system requirements.

Supported Browsers

Browser	Supported Versions
Google Chrome	76 or higher
Microsoft Edge	44 or higher

Supported Operating Systems

Operating System	Version
Microsoft Windows	7 or higher
Mac OS	X or higher

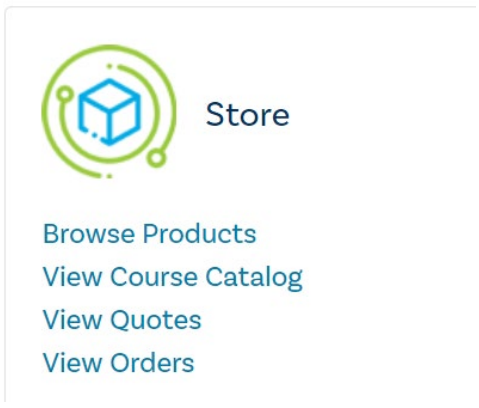
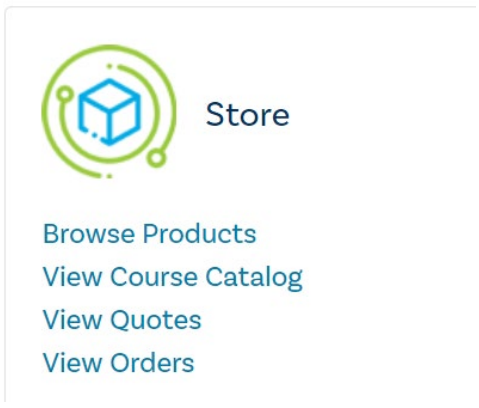
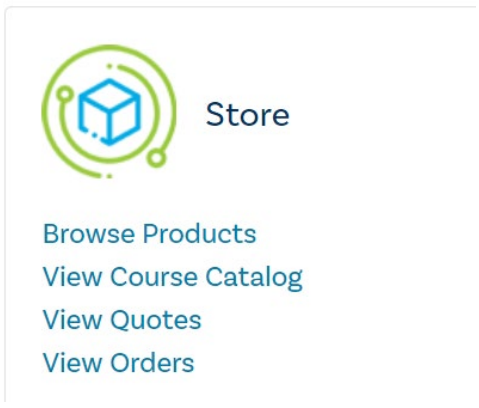
Please note that anti-virus software installed on computers may prevent list or template download.

Recommended Display (Screen)

You will need a display (screen) that has a minimum resolution width of 880 pixels.

Please note that while it may be possible to still use the Admin Portal on a browser or operating system not listed above, many parts of the Admin Portal functionality you experience may be degraded and render the Admin Portal unusable. It is highly recommended to use the platforms listed above for optimal user experience.

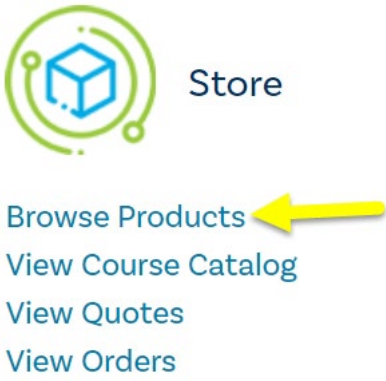


Key Terms	Term	Definition
	Roster	A list of individuals affiliated with your organization. The roster contains both IIA members and non-members who are affiliated with your organization linked by your organization's ID (GAN).
CustomerPO	Unique number assigned to your organization's approved Purchase Order, the official document issued by a buyer (Your Organization) committing to pay the seller (The IIA) for the sale of specific products or services to be delivered. The purchase order (PO) helps both the buyer and seller track delivery and payment.	

Section A: Navigate Account Dashboard											
Procedure	Follow the steps below to navigate the account dashboard.										
	<table border="1"> <thead> <tr> <th>Step</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1. Access the Admin Portal</td> <td>Go to https://adminportal.theiia.org and log in using your IIA credentials.</td> </tr> <tr> <td>2. Find Store and Shopping Cart</td> <td>For the purposes of this document, the only parts of the account dashboard you will need to be aware of are the Store section on the right hand side of the screen and the shopping cart on the top right hand side of the screen.</td> </tr> <tr> <td colspan="2" style="text-align: center;">  </td> </tr> <tr> <td>3. Look at Different Functions</td> <td> Store functions include: <ol style="list-style-type: none"> Browse Products- Browse and search through all the different products that the IIA offers. View Course Catalog – View all course offerings scheduled for the current year. Details include Course Offering Name, Delivery Method, Start Date, End Date, and Schedule for each session. View Quotes- Access previously generated quotes for potential purchases. View Orders- View recent and pending orders. </td> </tr> </tbody> </table>	Step	Description	1. Access the Admin Portal	Go to https://adminportal.theiia.org and log in using your IIA credentials.	2. Find Store and Shopping Cart	For the purposes of this document, the only parts of the account dashboard you will need to be aware of are the Store section on the right hand side of the screen and the shopping cart on the top right hand side of the screen.			3. Look at Different Functions	Store functions include: <ol style="list-style-type: none"> Browse Products- Browse and search through all the different products that the IIA offers. View Course Catalog – View all course offerings scheduled for the current year. Details include Course Offering Name, Delivery Method, Start Date, End Date, and Schedule for each session. View Quotes- Access previously generated quotes for potential purchases. View Orders- View recent and pending orders.
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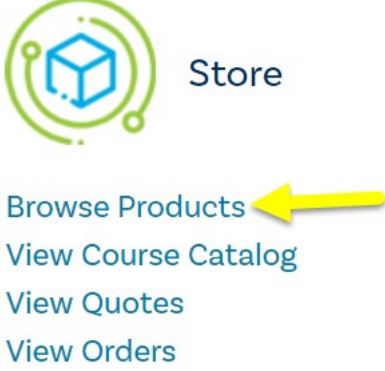




Section B: Browse Products



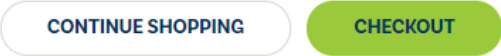


Procedure

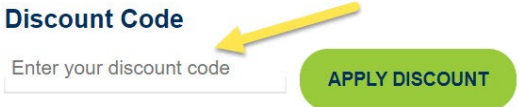



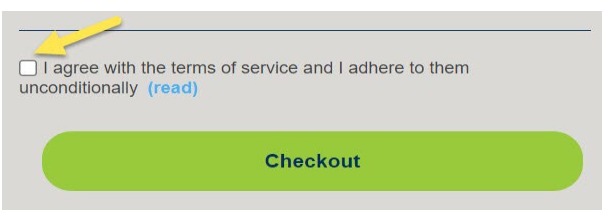

Follow the steps below to browse products.






Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org and log in using your IIA credentials.
2. Select Browse Products	<p>Under the "Store" logo, select "Browse Products."</p>  <p>The screenshot shows a green circular logo with a blue cube and a green arrow. To the right of the logo is the word "Store". Below "Store" are four menu items: "Browse Products", "View Course Catalog", "View Quotes", and "View Orders". A yellow arrow points to the "Browse Products" link.</p>
3. Filter By Product Type (optional step)	<p>Select "Filter by Product Type" near the top of the page and then you can filter products by different categories and subcategories.</p>  <p>The screenshot shows a blue button with the text "Filter by Product Type" and a downward-pointing triangle.</p>
3.1. Filter By Product Type (Courses)	<p>Different courses are available to be taken in various methods. Depending on the course, there can be live stream, online, or in person options.</p> <p>Live Stream courses have the start date of the course followed by the word "STREAM" in all caps. Online courses are have the start date of the course followed by the word "ONLINE" in all caps. Finally, in person courses have the date of the course followed by an abbreviation of the city where the course takes place. For example, 17FEB22ORL, indicates that the course starts on February 17, 2022, and delivered in person in Orlando, FL.</p> <p>For additional information, please consult the "Course Catalog."</p>
4. Sort By Price (optional step)	<p>Select where it says "Price" on the right hand side of the screen to filter by ascending or descending price.</p>  <p>The screenshot shows a blue button with a white double-headed vertical arrow icon and the word "PRICE" in white capital letters.</p>
5. Search for Product (optional step)	<p>If you know what you are looking for, you can utilize the search bar on the right side of the screen.</p> <p>Search: <input type="text"/></p>

Section C: Make Bulk Orders





Procedure	Follow the steps below to make bulk orders.	
	Step	Description
	1. Access the Admin Portal	Go to https://adminportal.theiia.org and log in using your IIA credentials.
	2. Select Browse Products	<p>Under the "Store" logo, select "Browse Products."</p>  <p>The screenshot shows a green circular logo with a blue cube and the word "Store" next to it. Below the logo are four menu items: "Browse Products", "View Course Catalog", "View Quotes", and "View Orders". A yellow arrow points to the "Browse Products" link.</p>
	3. Filter By Product Type (optional step)	<p>Select "Filter by Product Type" near the top of the page and then you can filter products by different categories and subcategories.</p>  <p>The screenshot shows a blue button with the text "Filter by Product Type" and a downward-pointing triangle.</p>
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	4. Sort By Price (optional step)	<p>Select where it says "Price" on the right hand side of the screen to filter by ascending or descending price.</p>  <p>The screenshot shows a blue button with a white up-down arrow and the word "PRICE" in white capital letters.</p>
	5. Search for Product (optional step)	<p>If you know what you are looking for, you can utilize the search bar on the right side of the screen.</p>  <p>The screenshot shows a search bar with the text "Search:" followed by a white input field with a light gray border.</p>
	6. Add Item to Cart	<p>When you find an item that you wish to purchase, select "Add to Cart," on the right hand side.</p>  <p>The screenshot shows a blue button with the text "Add to Cart" in white.</p>



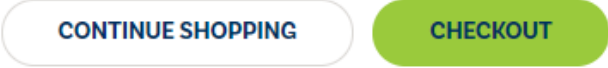


	<p>7. Sort/Search Roster Members</p>	<p>After you add your item to the cart, your roster members will be displayed. You can sort by name, job title, and email by selecting the corresponding column headers.</p>  <p>Alternatively, you can search for a specific roster member using the search function on the right side of the screen.</p> <p>Search: <input type="text"/></p> <p>Note: The account roster is comprised of members and non-members associated with your organization.</p>
	<p>8. Select Roster Member</p>	<p>Once, you know who you want to purchase the item for, you can select them by checking the box next to the person's name. If you wish to purchase the items for all roster members, save time by checking "Select All" at the top.</p> 
	<p>9. Review Shopping Cart</p>	<p>Review your order and the recipients to ensure that everything is correct. If you wish to continue shopping, select the white "Continue Shopping" button and repeat steps two through six. If you are finished shopping, select the green "Checkout" button.</p> 
	<p>10. Make Sure You Are Using Your Group Account</p>	<p>On the top right hand side of your screen, make sure you are using your group account, rather than your individual account. In this case, the group account is "Corporate US 12."</p>  <p>If you see that you are on your individual account, which will read "Individual," select it to reveal a drop down menu. From the drop down menu, you can select your group account.</p>
	<p>11. Enter CustomerPO (optional step)</p>	<p>If you have a Customer Purchase Order(PO), you can enter it in the "CustomerPO" field in the shopping cart.</p>  <p>Note: PO number will appear in future invoices and receipts associated with this order.</p>





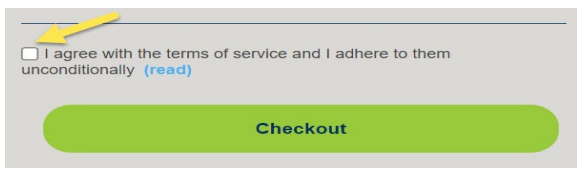
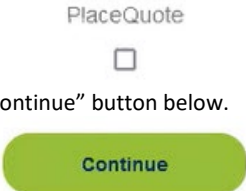
<p>12. Apply Discount Code (optional step)</p>	<p>If you have a discount code, enter it in the “Discount Code” field.</p>  <p>Then select the green “Apply Discount” button once code is entered.</p>  <p>Note: You may only apply one discount code per order, and discounts may not be combined.</p>
<p>13. Donate to the Internal Audit Foundation General Fund (optional step)</p>	<p>If you would like to make a donation to the Internal Audit Foundation General Fund, enter it in the “Donation” field.</p>  <p>Once your donation is entered, select the “Donate” button. The donation will then be included in your updated shopping cart.</p> 
<p>14. Agree to Terms of Service</p>	<p>Check “The Terms of Service” box after reviewing the terms of service. Then select “Checkout.”</p> 
<p>15. Select Billing Address</p>	<p>Select from your previously used addresses or type in a new address to be billed at. If you want your item to be shipped to the same address being billed, select to check the box next to where it says “Ship to the same address.”</p> <p><input checked="" type="checkbox"/> Ship to the same address</p> <p>Then select the green “Continue” button.</p>  <p>Note: Shipping address option only appears for shippable products such as physical books.</p>

	<p>16. Select Different Shipping Address (if applicable)</p>	<p>If you did not check the box in the previous step, this is where you can input your shipping address or select from a list of your previously used addresses. When you are finished, select the green “Continue” button.</p> <p style="text-align: center;"></p>
	<p>17. Choose Shipping (If applicable)</p>	<p>Choose your preferred shipping type. Shipping applies only if you are buying physical books.</p> <p style="text-align: center;"> <input checked="" type="radio"/> UPS Ground (\$11.64) <input type="radio"/> UPS 2nd Day Air (\$25.36) </p> <p>Then, select the green “Continue” button below.</p> <p style="text-align: center;"></p>
	<p>18. Select Payment Method</p>	<p>Select your preferred payment method. Options include ACH, Check/Money Order, Pay on Account, Credit/Debit Card, and Wire Transfer. Then, once again select the green “Continue” button below.</p> <p style="text-align: center;"></p> <p>Notes:</p> <ol style="list-style-type: none"> a. Orders with deferred payment methods (ACH, Checks and Wire Transfers) expire after 60 days. b. If payment has not been received within 60 days, your order will be cancelled. c. Benefits and products will not be fulfilled until payment has been received and posted by the IIA.
	<p>19. Fill Out Payment Information</p>	<p>Fill out your payment information that corresponds to the payment method you have selected. When you are finished, select the green “Continue” button.</p> <p style="text-align: center;"></p>
	<p>20. Confirm Order</p>	<p>Review your order summary one last time and if everything is correct, select the green “Confirm” button at the bottom of the page.</p> <p style="text-align: center;"></p>
	<p>21. Confirmation E-mail</p>	<ol style="list-style-type: none"> 1. If your payment method was by Credit, you will receive a “Payment Confirmation” email. 2. If you selected a deferred payment method (ACH, Checks, or Wire Transfer) you will an “Order Confirmation” email. Once payment is received and posted, you will receive Payment Confirmation. 3. After Payment Confirmation, anyone for whom you purchased products and services will receive the appropriate follow up email to access the service/product, or to complete registration for events.

Section D: Get a Quote

Procedure	Follow the steps below to get a quote.	
	Step	Description
	1. Access the Admin Portal	Go to https://adminportal.theiia.org and log in using your IIA credentials.
	2. Select Browse Products	Under the “Store” logo, select “Browse Products.” 
	3. Filter By Product Type (optional step)	Select “Filter by Product Type” near the top of the page and then you can filter products by different categories and subcategories. 
	3.1. Filter By Product Type (Courses)	Different courses are available to be taken in various methods. Depending on the course, there can be live stream, online, or in person options. Live Stream courses have the start date of the course followed by the word “STREAM” in all caps. Online courses are have the start date of the course followed by the word “ONLINE” in all caps. Finally, in person courses have the date of the course followed by an abbreviation of the city where the course takes place. For example, 17FEB22ORL, indicates that the course starts on February 17, 2022, and delivered in person in Orlando, FL. For additional information, please consult the “Course Catalog.”
	4. Sort By Price (optional step)	Select where it says “Price” on the right hand side of the screen to filter by ascending or descending price. 
	5. Search for Product (optional step)	If you know what you are looking for, you can utilize the search bar on the right side of the screen. Search: <input type="text"/>
	6. Add Item to Cart	When you find an item that you wish to purchase, select “Add to Cart,” on the right hand side. 

	<p>7. Sort/Search Roster Members</p>	<p>After you add your item to the cart, your roster members will be displayed. You can sort by name, job title, and email by selecting the corresponding column headers.</p>  <p>Alternatively, you can search for a specific roster member using the search function on the right side of the screen.</p> <p>Search: <input type="text"/></p> <p>Note: The account roster is comprised of members and non-members associated with your organization.</p>
	<p>8. Select Roster Member</p>	<p>Once, you know who you want to purchase the item for, you can select them by selecting the box next to the person's name. If you wish to purchase the items for all roster members, save time by checking "Select All" at the top.</p> 
	<p>9. Review Shopping Cart</p>	<p>Review your order and the recipients to ensure that everything is correct. If you wish to continue shopping, select the white "Continue Shopping" button and repeat steps two through six. If you are finished shopping, select the green "Checkout" button.</p> 
	<p>10. Make Sure You Are Using Your Group Account</p>	<p>On the top right hand side of your screen, make sure you are using your group account, rather than your individual account. In this case, the group account is "Corporate US 12."</p> <p>MY ACCOUNT SHOPPING CART (3) SIGN OUT CORPORATE US 12 </p> <p>If you see that you are on your individual account, which will read "Individual," select it to reveal a drop down menu. From the drop down menu, you can select your group account.</p>
	<p>11. Enter CustomerPO (optional step)</p>	<p>If you have a Customer Purchase Order(PO), you can enter it in the "CustomerPO" field in the shopping cart.</p> <p>CustomerPO</p> <p><input type="text"/></p>  <p>Note: PO number will appear in future invoices and receipts associated with this order.</p>



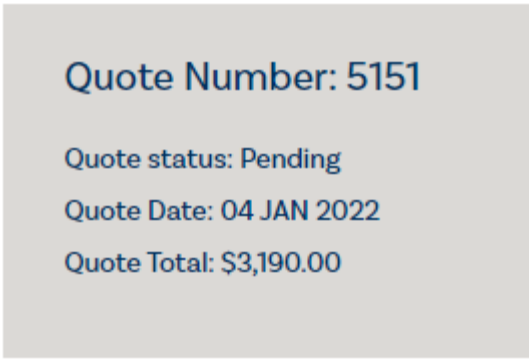

	<p>12. Apply Discount Code (optional step)</p>	<p>If you have a discount code, enter it in the “Discount Code” field.</p>  <p>Then select the green “Apply Discount” button once code is entered.</p>  <p>Note: You may only apply one discount code per order, and discounts may not be combined.</p>
	<p>13. Donate to the Internal Audit Foundation General Fund (optional step)</p>	<p>If you would like to make a donation to the Internal Audit Foundation General Fund, enter it in the “Donation” field.</p>  <p>Once your donation is entered, select the “Donate” button. The donation will then be included in your updated shopping cart.</p> 
	<p>14. Agree to Terms of Service</p>	<p>Check “The Terms of Service” box after reviewing the terms of service. Then select “Checkout.”</p> 
	<p>15. Select to Place a Quote</p>	<p>Check the “Place Quote” box.</p>  <p>Then select the green “Continue” button below.</p> <p>Please note that quotes generated during promotional period will be recalculated if quote is not converted to an order by the end of the promotional period.</p>



	<p>16. Choose Shipping (If applicable)</p>	<p>Choose your preferred shipping type. Shipping applies only if you are buying physical books.</p> <p> <input checked="" type="radio"/> UPS Ground (\$11.64) <input type="radio"/> UPS 2nd Day Air (\$25.36) </p> <p>Finally, select the green "Continue" button below and the quote will save to your account. Please note that quotes expire after 60 days.</p> <p style="text-align: center;">Continue</p>
	<p>17. Confirmation E-mail</p>	<p>You will now receive an e-mail confirming your quote.</p>

Section E: View Quotes

Procedure

Follow the steps below to view quotes.

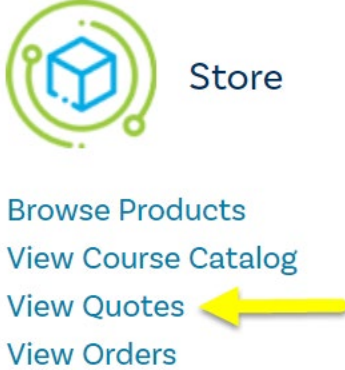

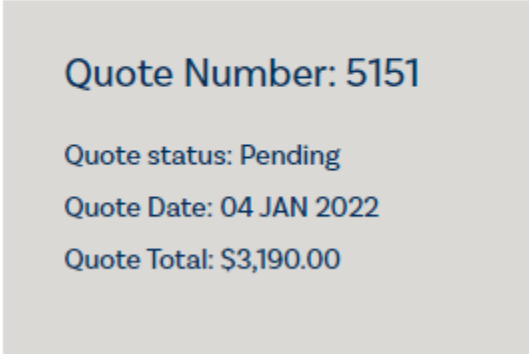

Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org and log in using your IIA credentials.
2. Select View Quotes	<p>Select where it says “View Quotes” under the Store logo.</p> 
3. Make Sure You Are Using Your Group Account	<p>If you can not find your quote, check the top right hand side of your screen, make sure you are using your group account, rather than your individual account. In this case, the group account is “Corporate US 12.”</p>  <p>If you see that you are on your individual account, which will read “Individual,” select it to reveal a drop down menu. From the drop down menu, you can select your group account.</p>
4. View Quotes	<p>Under “Quotes”, you can view all your outstanding quotes including key information such as the quote number, quote status, quote date and the quote total.</p>  <p>If you want to get more information about a specific quote, you can select “Details” on the right.</p> 





	<p>5. Print Quote or Save as PDF (optional step)</p>	<p>On this page, you will find an itemized breakdown of your quote. At the top of the page, you can print your quote by pressing the green “Print” button or you can save it in PDF format by selecting the green “PDF Invoice” button.</p> <p> </p>
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Section F: Turn a Quote Into an Order

Procedure

Follow the steps below to turn a quote into an order.

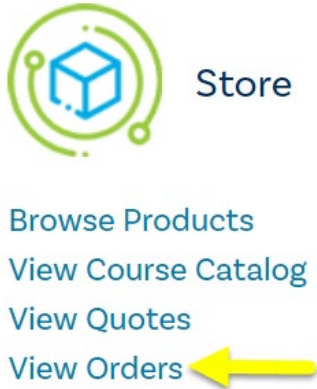

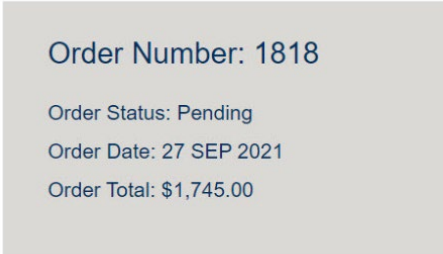

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4. Select Quote	<p>Under "Quotes", you can view all your outstanding quotes including key information such as the quote number, quote status, quote date and the quote total.</p>  <p>Once you have found the one you wish to convert to an order, select "Details" on the right.</p> 



	<p>5. Convert Your Quote</p>	<p>Review the quote, then scroll down and select the green "Place Order" button.</p> 
	<p>6. Select Payment Method</p>	<p>Select your preferred payment method. Options include ACH, Check/Money Order, Pay on Account, Credit/Debit Card, and Wire Transfer. Then, once again select the green "Continue" button below.</p>  <p>Notes:</p> <ol style="list-style-type: none"> Orders with deferred payment methods (ACH, Checks and Wire Transfers) expire after 60 days. If payment has not been received within 60 days, your order will be cancelled. Benefits and products will not be fulfilled until payment has been received and posted by the IIA.
	<p>7. Fill Out Payment Information</p>	<p>Fill out your payment information that corresponds to the payment method you have selected. When you are finished, select the green "Continue" button.</p> 
	<p>8. Confirm Order</p>	<p>Scroll down and select the green "Confirm" button.</p> 
	<p>9. Confirmation E-mail</p>	<ol style="list-style-type: none"> If your payment method was by Credit, you will receive a "Payment Confirmation" email. If you selected a deferred payment method (ACH, Checks, or Wire Transfer) you will an "Order Confirmation" email. Once payment is received and posted, you will receive Payment Confirmation. After Payment Confirmation, anyone for whom you purchased products and services will receive the appropriate follow up email to access the service/product, or to complete registration for events.

Section G: View Orders

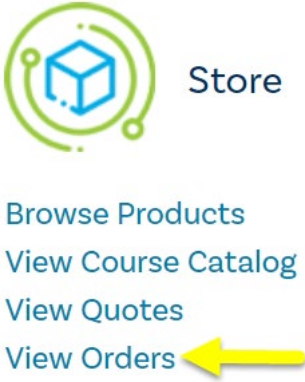
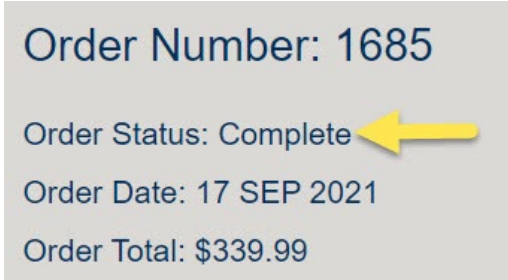
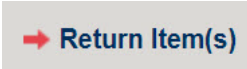

Procedure

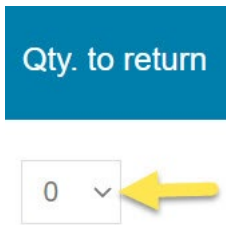

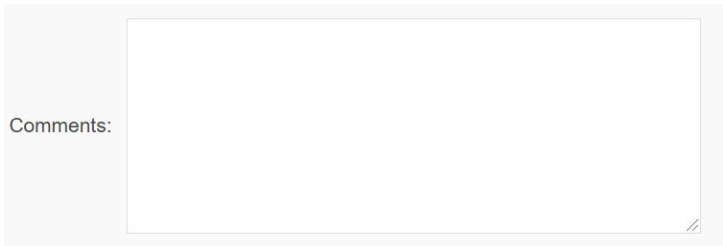

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Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org and log in using your IIA credentials.
2. Access Orders	<p>Select where it says “View Orders” on the bottom row under the Store logo.</p> 
3. Make Sure You Are Using Your Group Account	<p>If you can not find your order, check the top right hand side of your screen, make sure you are using your group account, rather than your individual account. In this case, the group account is “Corporate US 12.”</p>  <p>If you see that you are on your individual account, which will read “Individual,” select it to reveal a drop down menu. From the drop down menu, you can select your group account.</p>
4. View Orders	<p>Under “Orders”, you can view all your orders as well as key information such as the order number, order status, order date and the order total.</p>  <p>If you want to get more information about a specific order, you can select where it says “Details” on the right.</p> 

	<p>5. Print Order or Save as PDF (optional step)</p>	<p>On this page, you will find an itemized breakdown of your order. At the top of the page, you can print your order by pressing the green "Print" button or you can save it in PDF format by selecting the green "PDF Invoice" button.</p> <p> </p>
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Section H: Request a Refund

Procedure	Follow the steps below to request a refund.	
	Step	Description
1. Access the Admin Portal		Go to https://adminportal.theiia.org and log in using your IIA credentials.
2. Access Orders		<p>Select where it says “View Orders” on the bottom row under the Store logo.</p> 
3. Select Item You Want to Return		<p>Under “Orders”, you can view all your recent orders. Please note that only orders with the status “Complete” are able to be refunded. You can find the order status under the order number, as depicted in the picture below.</p>  <p>On the top right hand side of orders that are eligible for returns, there is a “Return Item(s)” button. When you have decided which item you would like to return, select it.</p> 
4. Make Sure You Are Using Your Group Account		<p>If you can not find your order, check the top right hand side of your screen, make sure you are using your group account, rather than your individual account. In this case, the group account is “Corporate US 12.”</p>  <p>If you see that you are on your individual account, which will read “Individual,” select it to reveal a drop down menu. From the drop down menu, you can select your group account.</p>

	<p>5. Select Quantity to Return</p>	<p>On the top right side of the screen, select the arrow under “Qty. to return” to open up a dropdown menu. Then, select the quantity of the item purchased you would like to return.</p> 
	<p>6. Select Return Reason</p>	<p>Select the downward-facing arrow, on the right hand side of where it says “Return reason.” This will open a dropdown menu full of options such as “Customer Changed Mind” and “Duplicate Purchase.” Choose the option that best applies to why you are returning your product.</p> 
	<p>7. Write Comments (Optional)</p>	<p>Enter a brief comment on the reason for the return.</p> 
	<p>8. Submit Return Request</p>	<p>Select the “Submit return request” button to finalize your request.</p> 
	<p>9. Confirmation E-mail (Submitted)</p>	<p>You will now receive an email confirming that your refund has been submitted.</p> <p>You will receive an status update email within 14 business days once your refund request has been received. A status of received means that your request is being reviewed by an IIA Customer Service representative.</p>
	<p>10. Confirmation E-mail (Processed)</p>	<p>Once your refund is processed, you will receive a second email with details of your refund. If you paid by credit or debit card, please allow 7-14 business days for the refund to be reflected in your account. For all other payment methods, a check will be mailed to the billing address you used in the order.</p>