

Self Service Portal: Address

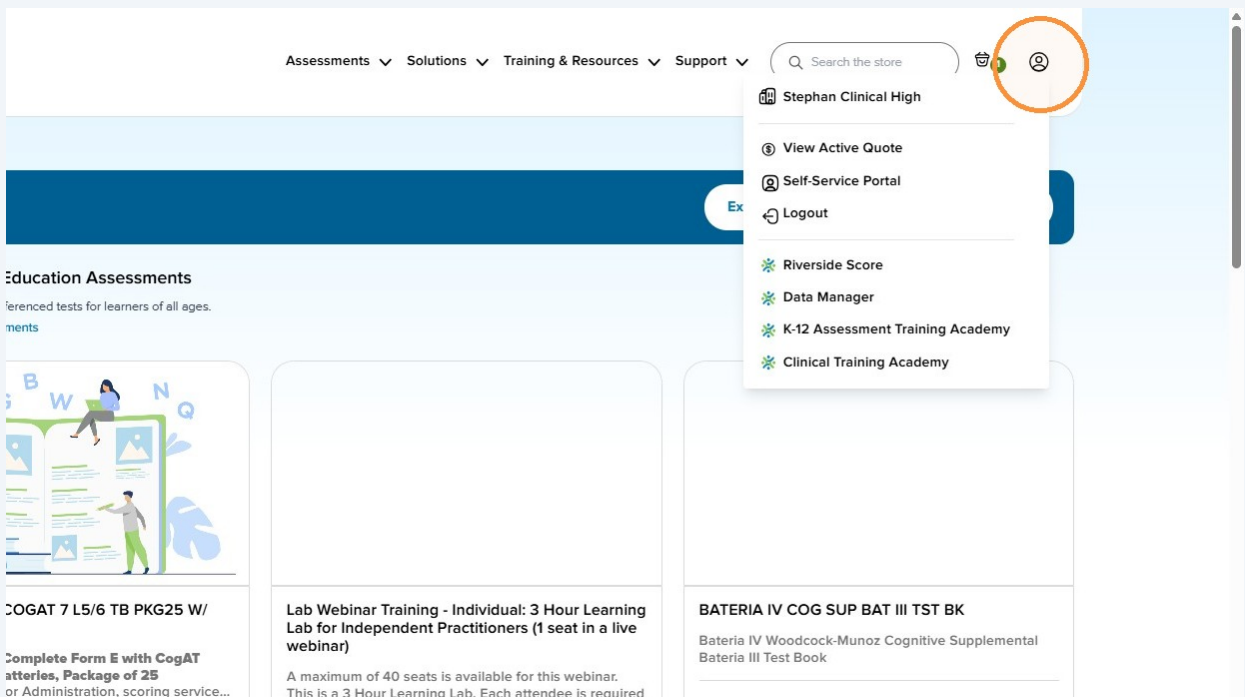


This guide provides a step-by-step walkthrough for effectively managing addresses within the Self Service Portal, making it easy for users to navigate, filter, and update their address information. It highlights essential features, such as setting default shipping addresses and adding new addresses, ensuring a seamless user experience.

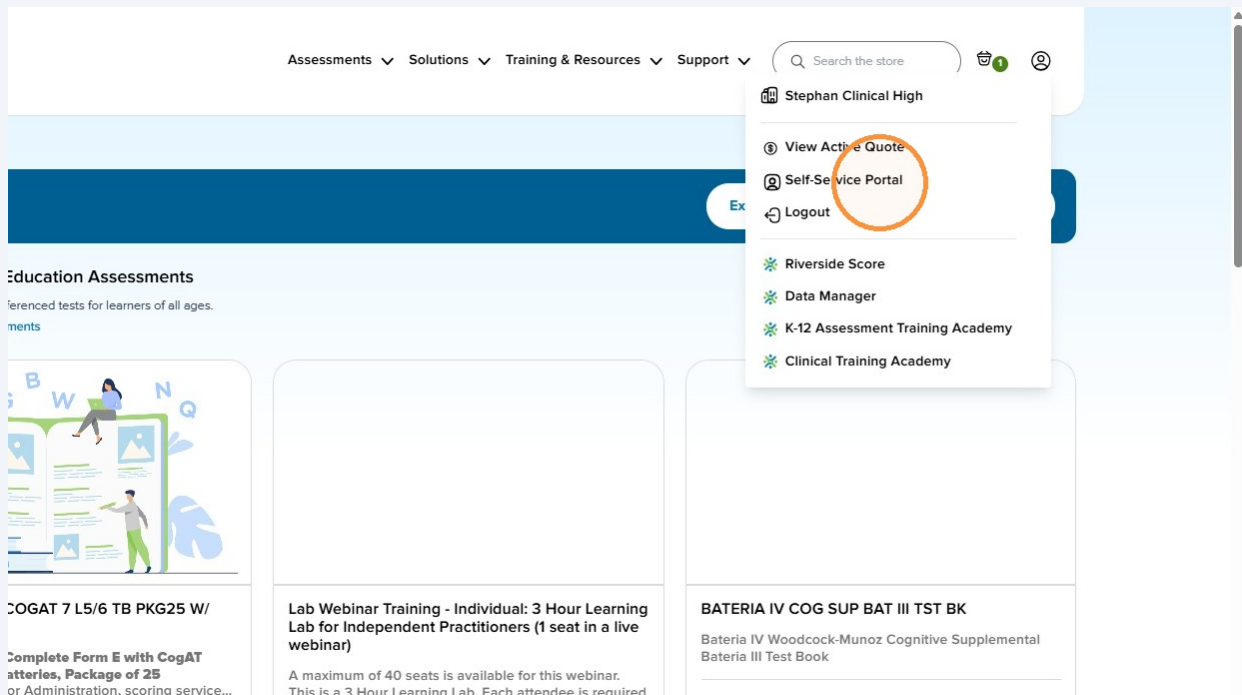
Navigating the Address Section

1

Navigate to the User icon
Note: You must be logged in

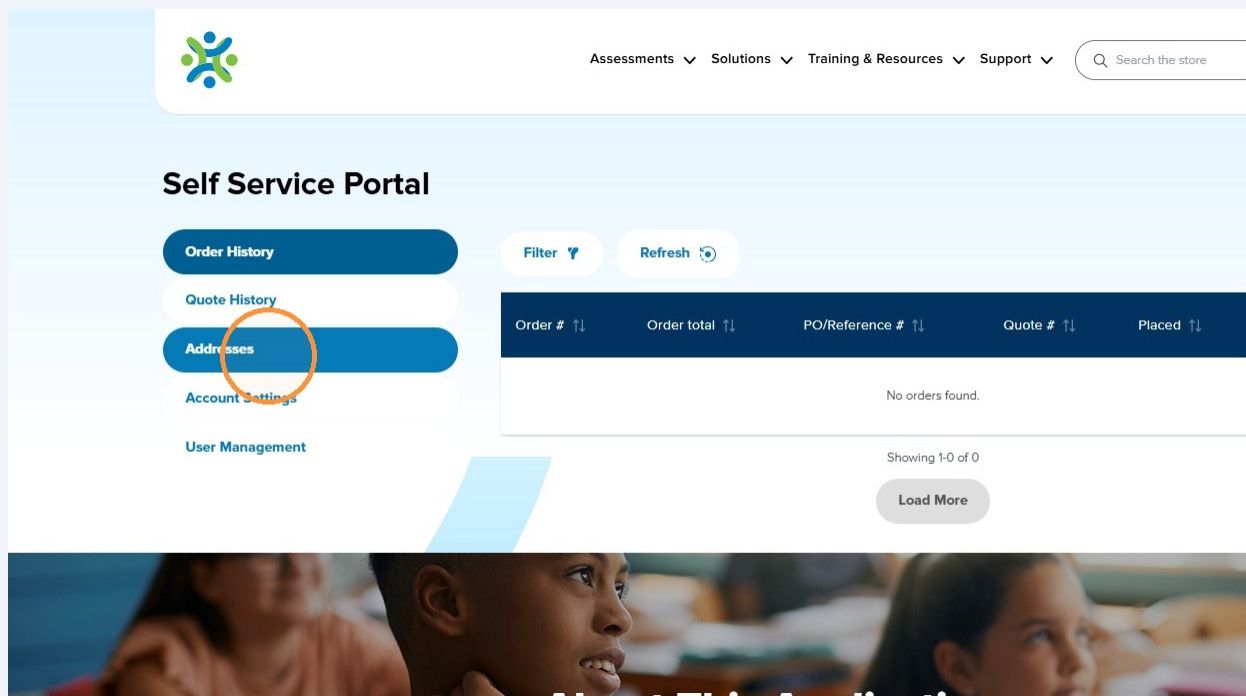


2 Click "Self-Service Portal"



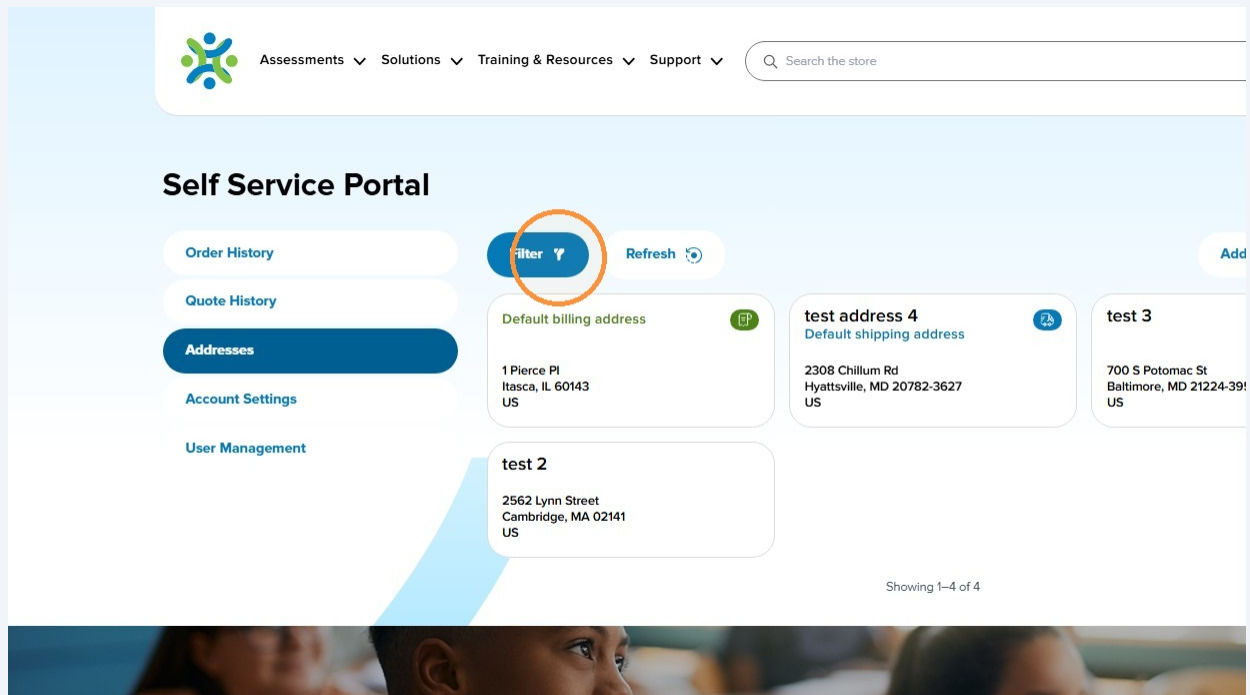
The screenshot shows the top navigation bar of a website with links for Assessments, Solutions, Training & Resources, and Support. A search bar is present with the text "Search the store". Below the navigation bar, a user profile dropdown menu is open, showing the user's name "Stephan Clinical High" and a list of options: "View Active Quote", "Self-Service Portal" (highlighted with an orange circle), "Logout", "Riverside Score", "Data Manager", "K-12 Assessment Training Academy", and "Clinical Training Academy". The main content area below the navigation bar is titled "Education Assessments" and features a grid of product cards. The first card is for "COGAT 7 L5/6 TB PKG25 W/ Complete Form E with CogAT Batteries, Package of 25 or Administration, scoring service...". The second card is for "Lab Webinar Training - Individual: 3 Hour Learning Lab for Independent Practitioners (1 seat in a live webinar)". The third card is for "BATERIA IV COG SUP BAT III TST BK".

3 Click "Addresses"

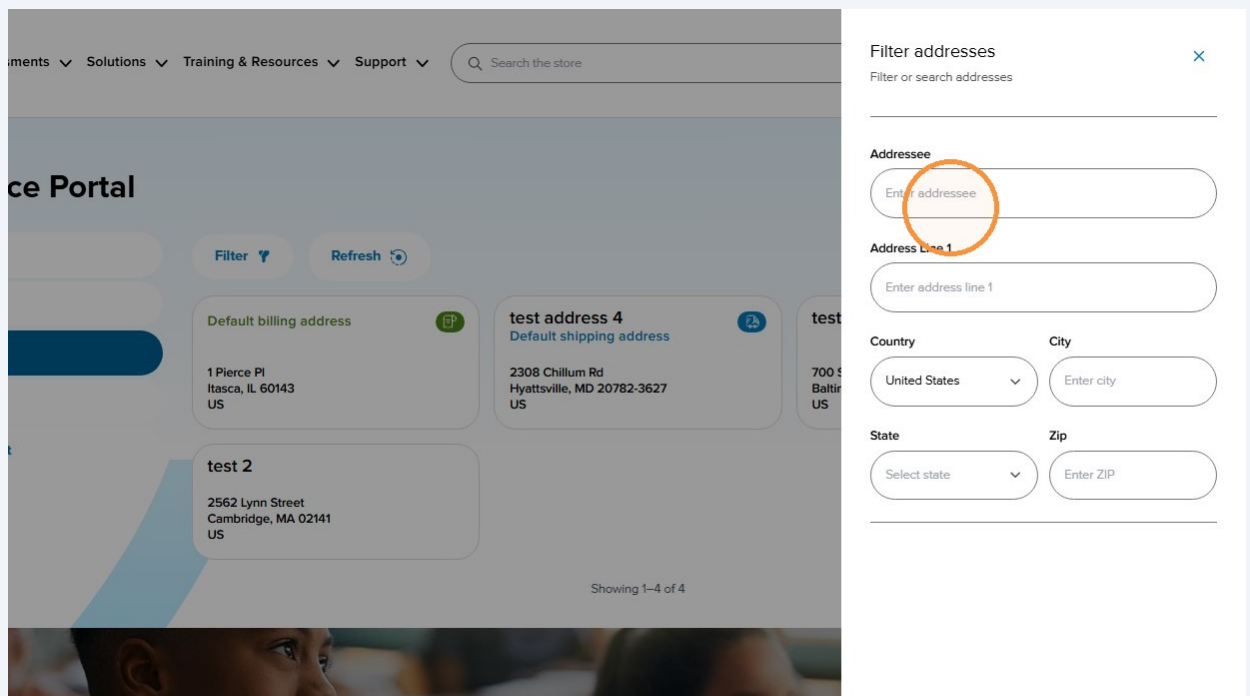


The screenshot shows the "Self Service Portal" page. The top navigation bar is the same as in the previous screenshot. The main content area is titled "Self Service Portal" and features a sidebar with a list of links: "Order History", "Quote History", "Addresses" (highlighted with an orange circle), "Account Settings", and "User Management". To the right of the sidebar, there are "Filter" and "Refresh" buttons. Below these buttons is a table with the following columns: "Order #", "Order total", "PO/Reference #", "Quote #", and "Placed". The table is currently empty, displaying "No orders found." and "Showing 1-0 of 0". A "Load More" button is located at the bottom of the table. The bottom of the page features a banner image of three children looking at a screen.

4 To filter you can select this icon



5 You can filter by addressee name, the address, city, state, or zip. You do not need to fill out each box.



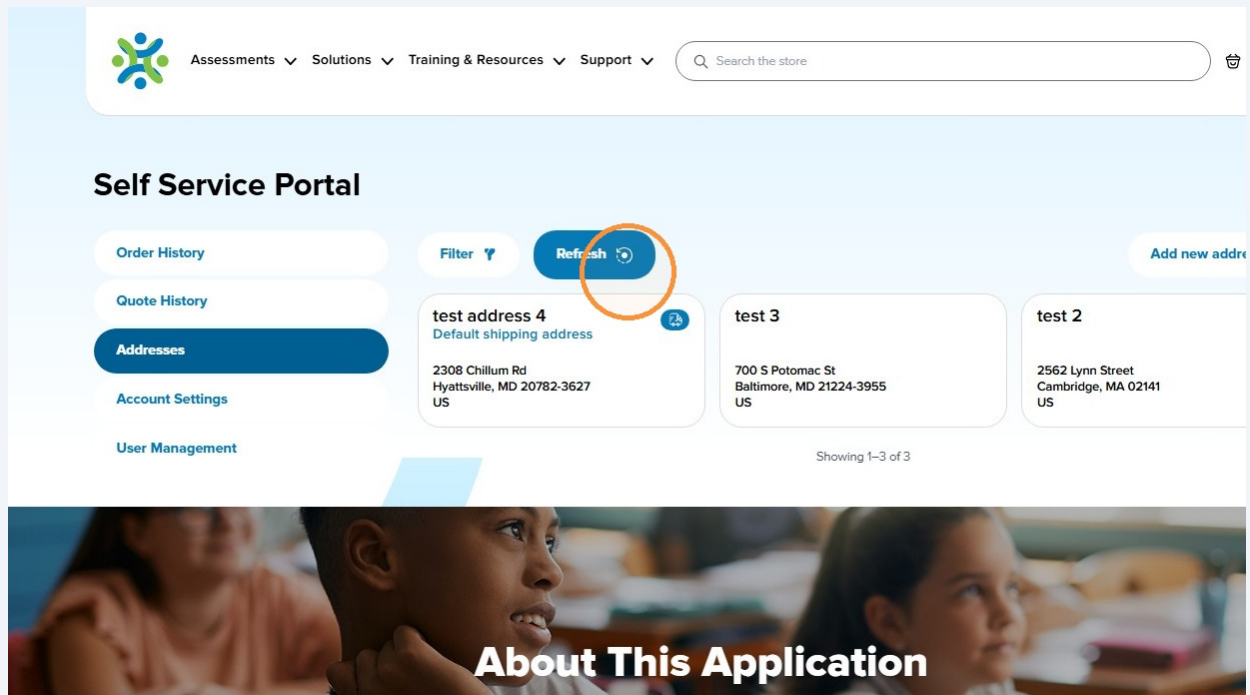
6 Let's search for addressees with the name "test". Click "Apply filter"

The screenshot shows a web application interface. At the top, there are buttons for "Filter" and "Refresh". Below these, a list of addresses is displayed. The first address is "Default billing address" with details: "1 Pierce Pl, Itasca, IL 60143, US". The second address is "test address 4" with details: "2308 Chillum Rd, Hyattsville, MD 20782-3627, US". The third address is "test 2" with details: "2562 Lynn Street, Cambridge, MA 02141, US". A fourth address is partially visible. Below the list, it says "Showing 1-4 of 4". At the bottom, there is a banner for "About This Application" with the text "This is the about page of the application" and a "Back to Home" button. On the right side, there is a sidebar with a form for filtering addresses. The form has fields for "Address Line 1", "Country" (set to "United States"), "City" (with a placeholder "Enter city"), "State" (with a dropdown "Select state"), and "Zip" (with a placeholder "Enter ZIP"). At the bottom of the sidebar, there are buttons for "Reset filter" and "Apply filter". The "Apply filter" button is circled in orange.

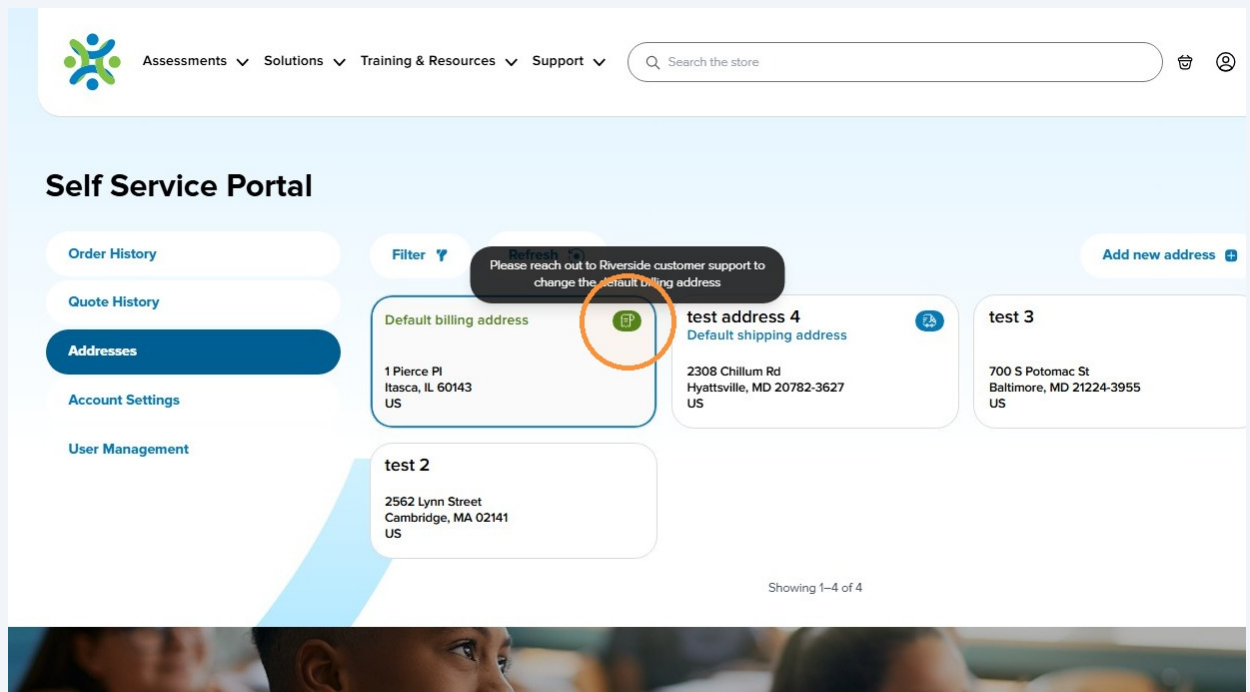
7 When we searched for "test" in the addressee field, we have three results.

The screenshot shows the same web application interface as before, but with the search results for "test". The list of addresses now only shows three results: "test address 4", "test 3", and "test 2". The "test address 4" details are "2308 Chillum Rd, Hyattsville, MD 20782-3627, US". The "test 3" details are "700 S Potomac St, Baltimore, MD 21224-3955, US". The "test 2" details are "2562 Lynn Street, Cambridge, MA 02141, US". Below the list, it says "Showing 1-3 of 3". The "About This Application" banner is still at the bottom. The sidebar on the right is not visible in this screenshot. The "test 3" address card is circled in orange.

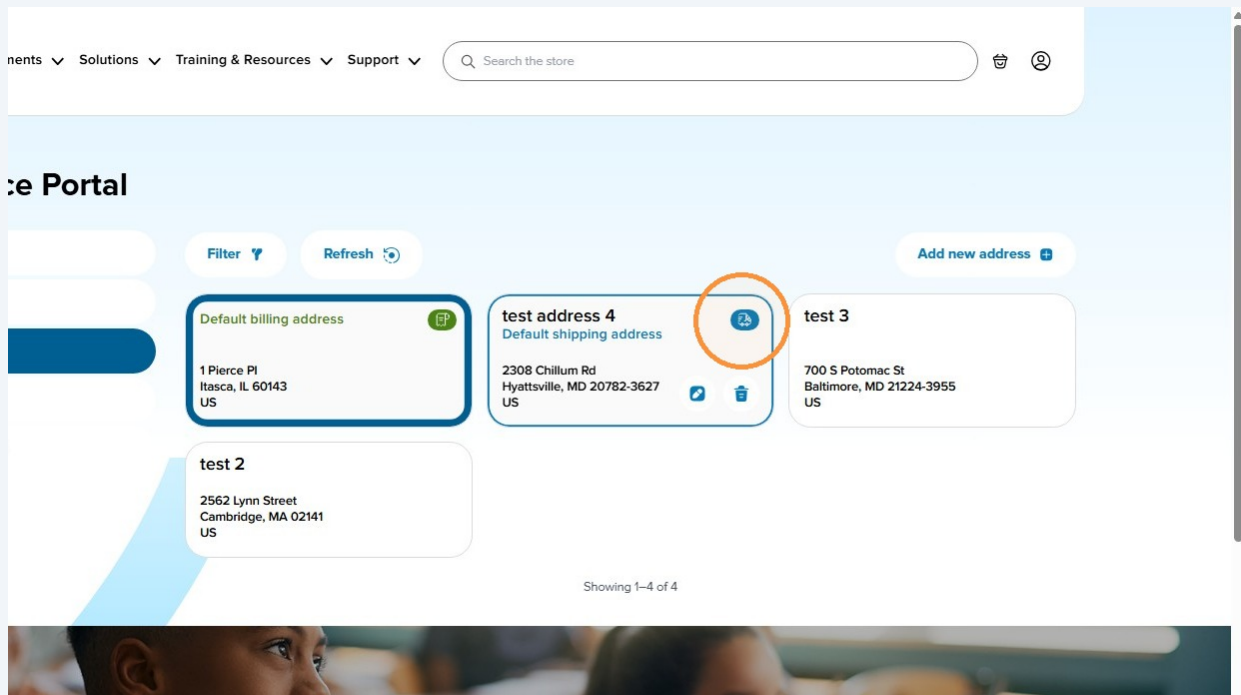
8 To clear the filter, Click "Refresh"



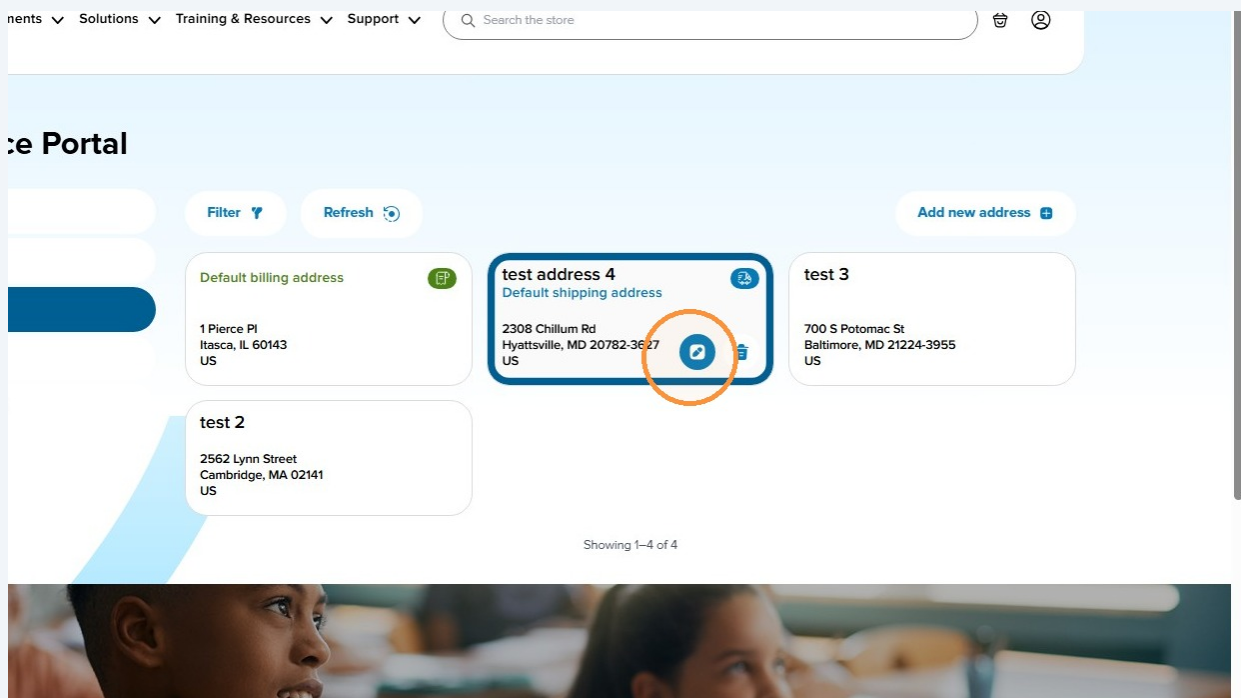
9 This icon shows the default billing address for the account. If you hover over it a message will appear "Please reach out to Riverside customer support to change the default billing address". Users cannot change this themselves.



10 This icon shows the default shipping address for the account. We can change this.



11 Click the edit icon



12 We can update any details and even select or deselect default shipping address."

The screenshot shows a web application interface. On the left, there's a list of addresses under the heading "Showing 1-4 of 4". The addresses are:

- Default billing address: 1 Pierce Pl, Itasca, IL 60143 US
- test address 4 (Default shipping address): 2308 Chillum Rd, Hyattsville, MD 20782-3627 US
- test 2: 2562 Lynn Street, Cambridge, MA 02141 US

Below the list is a banner for "About This Application" with the text "This is the about page of the application" and a "Back to Home" button.

On the right, there's a form to update details. The form includes:

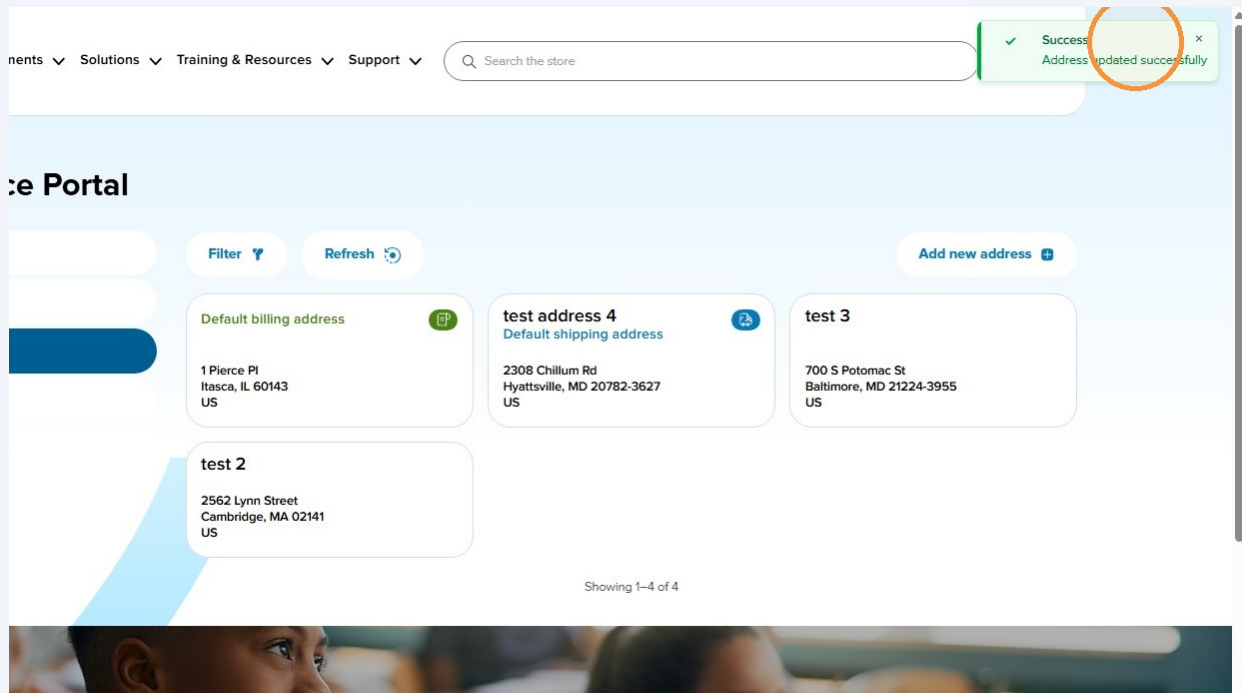
- Address line 2: Enter address line 2 (0/35)
- Address line 3: Enter address line 3 (0/35)
- Country: United States (dropdown)
- City: Hyattsville
- State: Maryland (dropdown)
- ZIP: 20782-3627
- Default shipping address: ☒ (checkbox)
- Save changes (button)

An orange circle highlights the "Default shipping address" checkbox.

13 Click "Save changes"

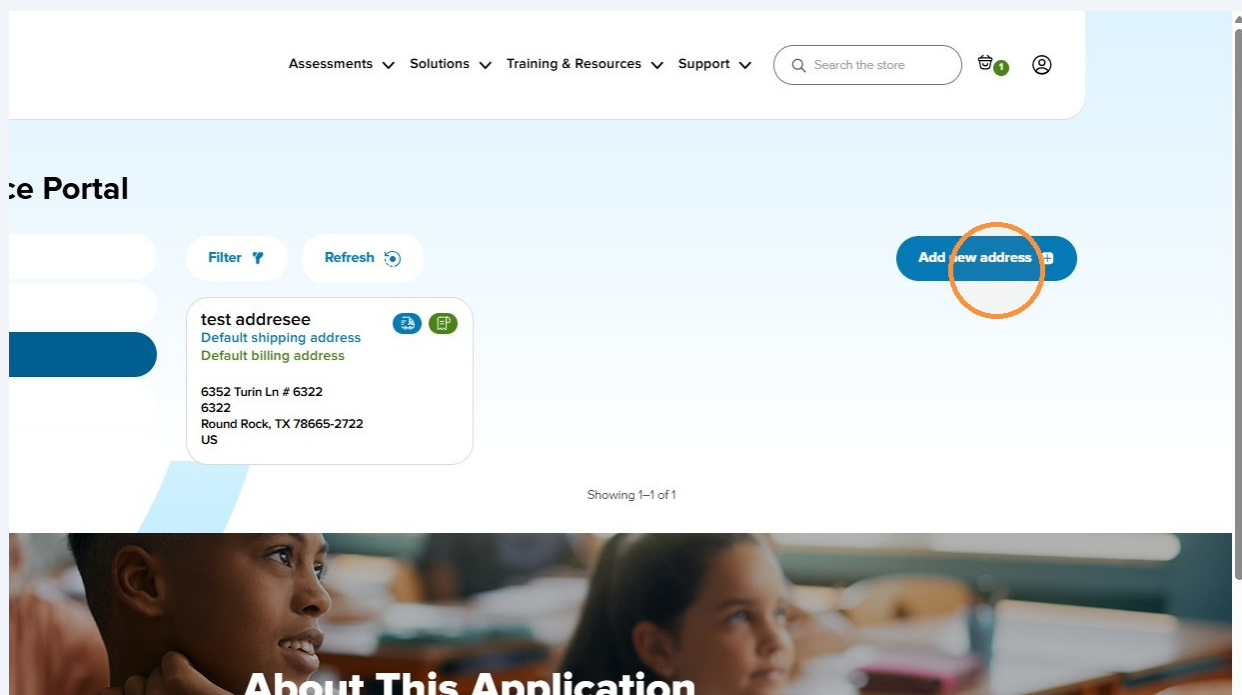
This screenshot is identical to the previous one, showing the address management interface and the update form. The only difference is that the "Save changes" button at the bottom of the form is now highlighted with an orange circle.

14 A success message will pop up in the top right corner.



Adding a New Address

15 Click "Add new address"



16 Fill out the address information

Assessments ▾ Solutions ▾ Training & Resources ▾ Support ▾

Search

ce Portal

Filter ▾ Refresh

test addressee
Default shipping address
Default billing address

6352 Turin Ln # 6322
6322
Round Rock, TX 78665-2722
US

Showing 1-1 of 1

About This Application

This is the about page of the application

Back to Home

Add new address

Use this form below to manage an address

Addressee *
Enter addressee

Address line 1 *
Enter address line 1

Address line 2
Enter address line 2

Address line 3
Enter address line 3

Country *
United States ▾

City *
Enter city

State *
Enter state

17 Click "Validate & Continue"

Filter ▾ Refresh

test addressee
Default shipping address
Default billing address

6352 Turin Ln # 6322
6322
Round Rock, TX 78665-2722
US

Showing 1-1 of 1

About This Application

This is the about page of the application

Back to Home

Add new address

Use this form below to manage an address

Addressee *
Enter addressee

Address line 1 *
Enter address line 1

Address line 2
Enter address line 2

Address line 3
Enter address line 3

Country *
United States ▾

City *
Hiram

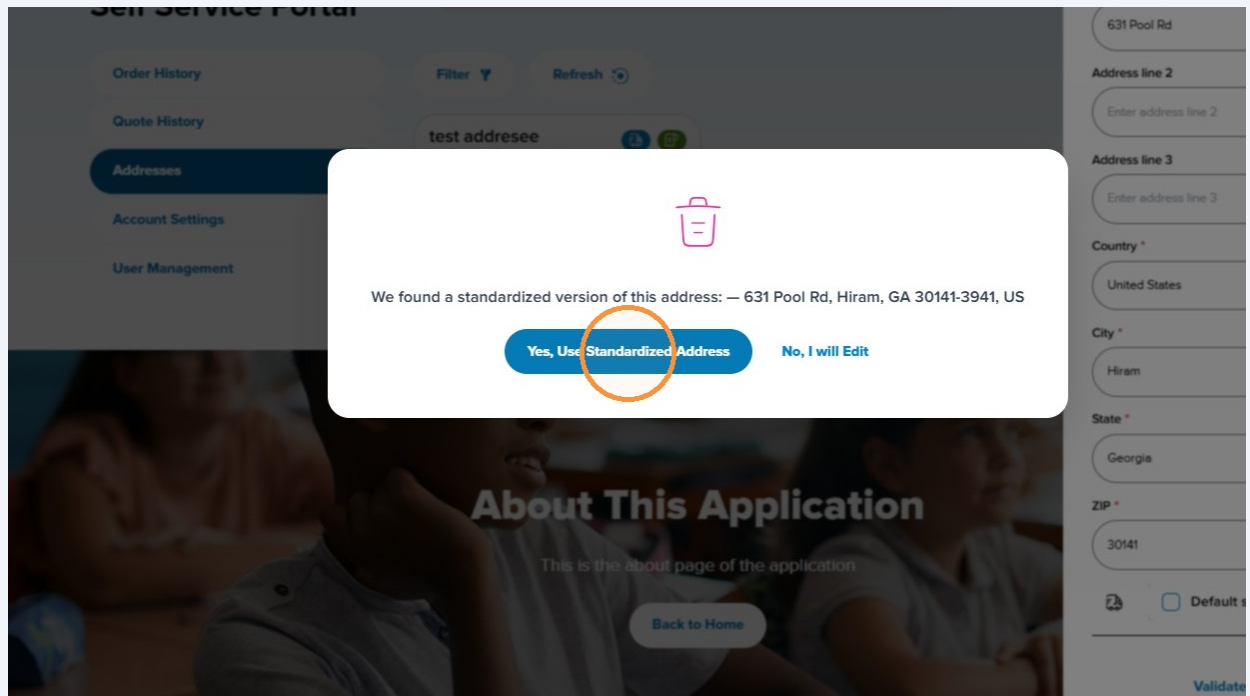
State *
Georgia ▾

ZIP *
30141

☐ Default shipping address

Validate & Continue

- 18 Click "Yes, Use Standardized Address" OR "No, I will Edit" if there is a mistake in the address.



- 19 New address will show up in the list of addresses.