

Self Service Portal: User Management

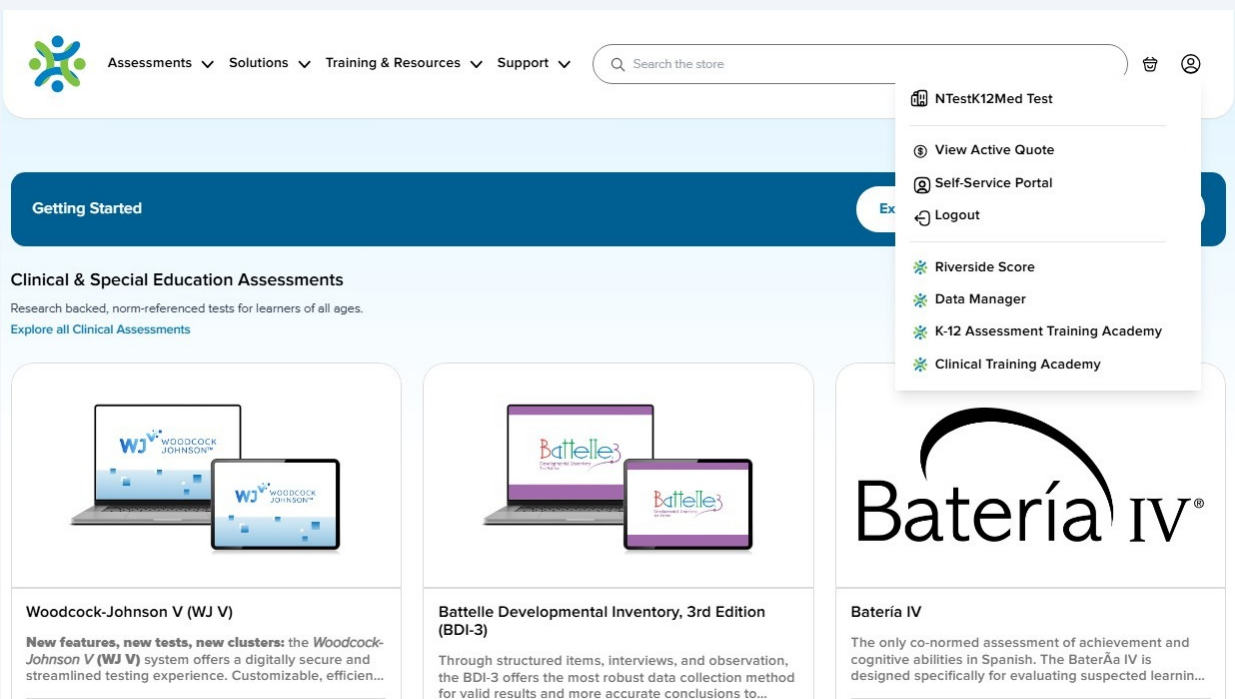


This guide provides a straightforward walkthrough for managing users within the Self-Service Portal, making it essential for administrators looking to streamline user onboarding and management. It covers key actions such as adding new users and deleting existing ones, ensuring efficient user administration.

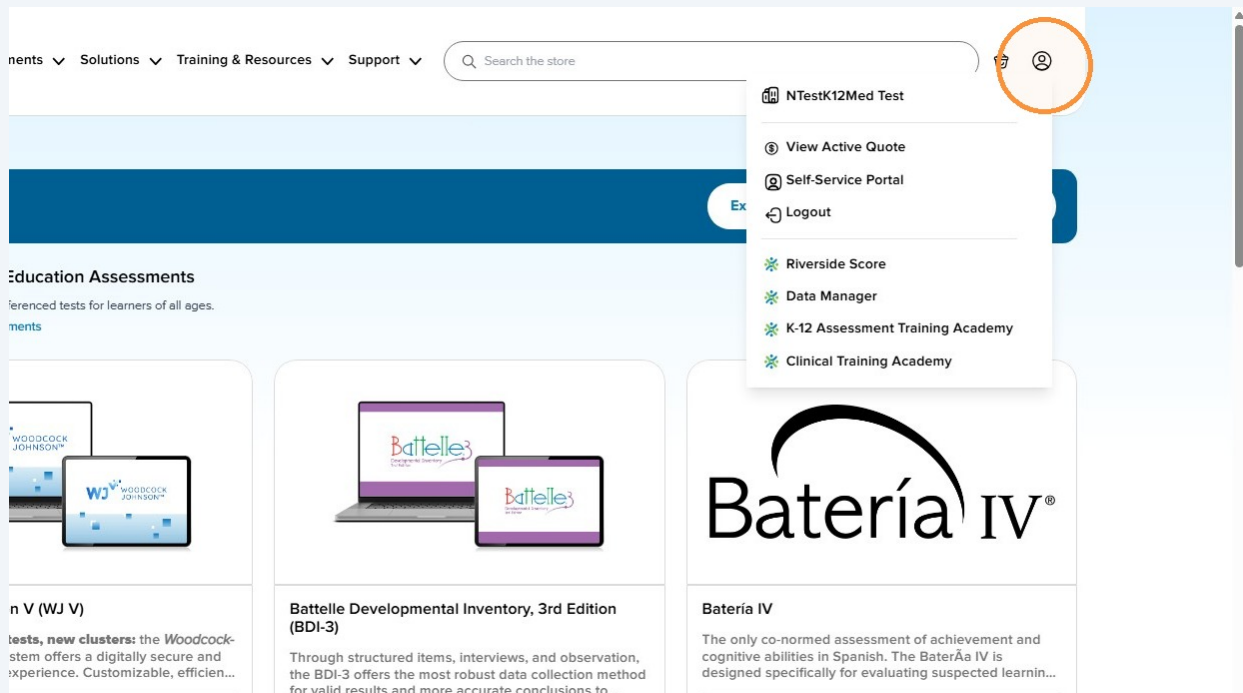
Navigating User Management

1

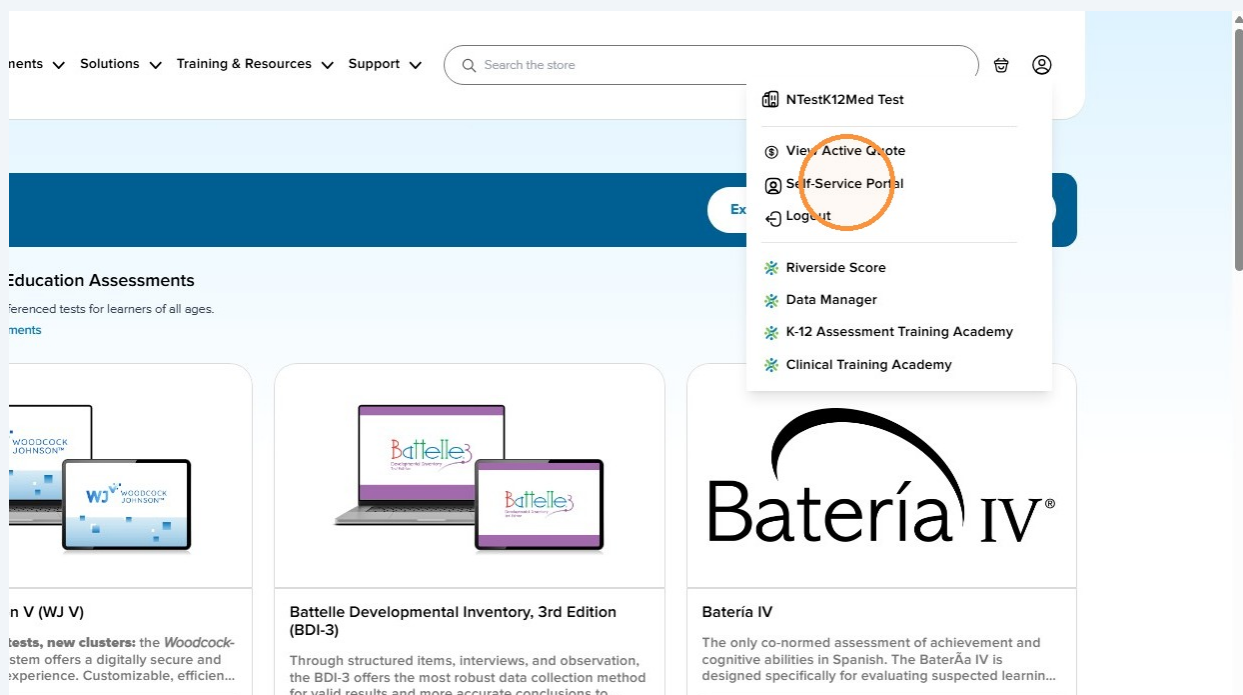
Navigate to <https://store.riversideinsights.com/>



2 Hover over the user icon



3 Click "Self-Service Portal"



4 Click "User Management"

The screenshot shows the 'Self Service Portal' interface. On the left, there is a sidebar with several menu items: 'Order History', 'Quote History', 'Addresses', 'Account Settings', and 'User Management'. The 'User Management' button is highlighted with an orange circle. To the right of the sidebar, there are 'Filter' and 'Refresh' buttons. Below these, a table displays a list of orders with columns for 'Order #', 'Order total', 'PO/Reference #', 'Quote #', 'Placed', and 'Status'.

Order #	Order total	PO/Reference #	Quote #	Placed	Status
EO000308	\$245.64			2/19/2026	Pending
EO000301	\$245.64			2/17/2026	Pending
EO000298	\$1,399.55			2/13/2026	Pending
EO000297	\$864.74			2/13/2026	Pending
EO000295	\$261.00	787051	QE000029	2/13/2026	Pending
EO000294	\$245.64		QE000054	2/13/2026	Pending
EO000293	\$1,402.55			2/13/2026	Pending

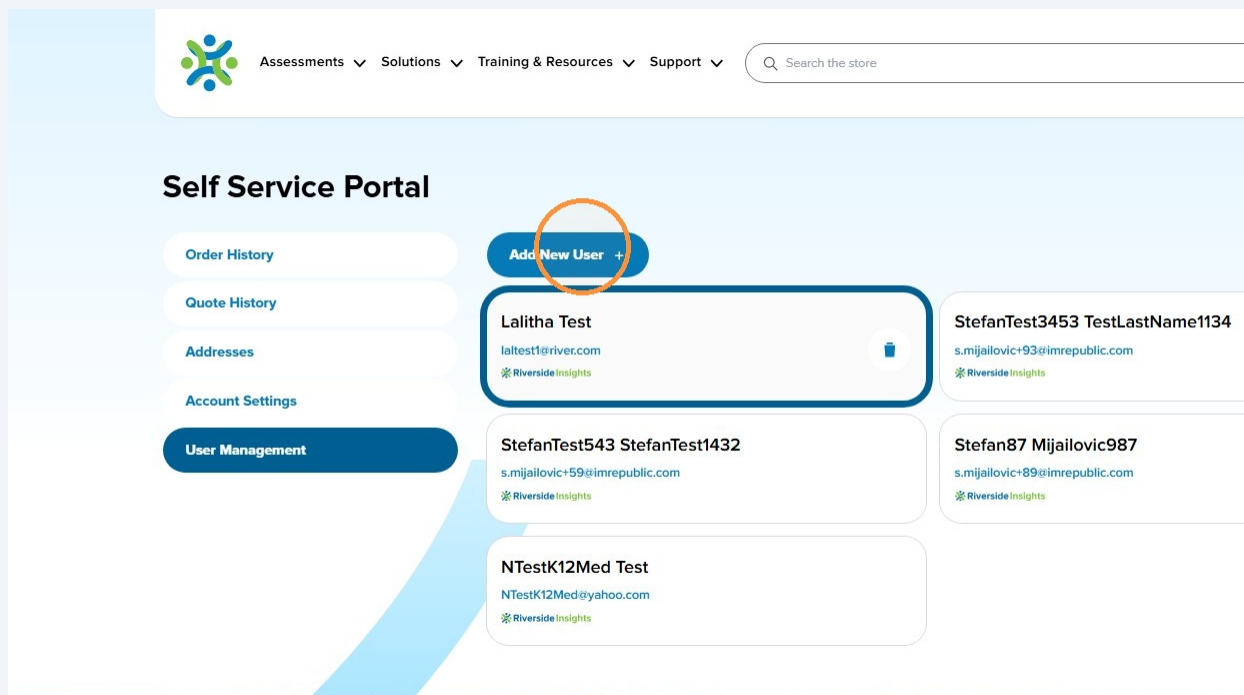
5 Here you can see all the users name and email addresses.

The screenshot shows the 'Self Service Portal' interface. At the top, there is a navigation bar with links for 'Assessments', 'Solutions', 'Training & Resources', and 'Support', along with a search bar labeled 'Search the store'. Below the navigation bar, the 'Self Service Portal' title is displayed. On the left, there is a sidebar with menu items: 'Order History', 'Quote History', 'Addresses', 'Account Settings', and 'User Management'. The 'User Management' button is highlighted with an orange circle. To the right of the sidebar, there is an 'Add New User +' button. Below this button, a list of users is displayed, each with a name, email address, and a Riverside Insights logo. One user's profile is highlighted with an orange circle.

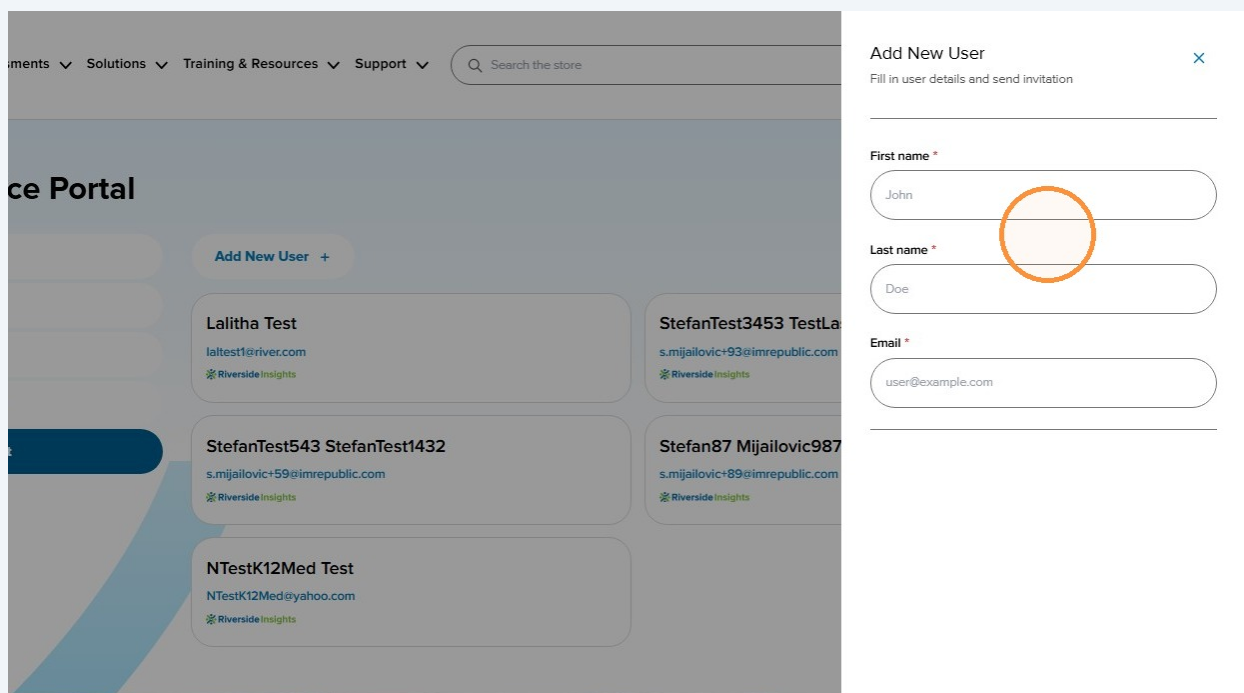
Name	Email	Riverside Insights
Lalitha Test	laltest1@river.com	Yes
StefanTest3453 TestLastName1134	s.mijailovic+93@imrepublic.com	Yes
StefanTest543 StefanTest1432	s.mijailovic+59@imrepublic.com	Yes
Stefan87 Mijailovic987	s.mijailovic+89@imrepublic.com	Yes
NTestK12Med Test	NTestK12Med@yahoo.com	Yes

Add a New User

6 To add a new user: Click "Add New User"



7 Add in a First Name, Last Name, and email. The email must not be in the account already.



8 Click "Send Invitation"

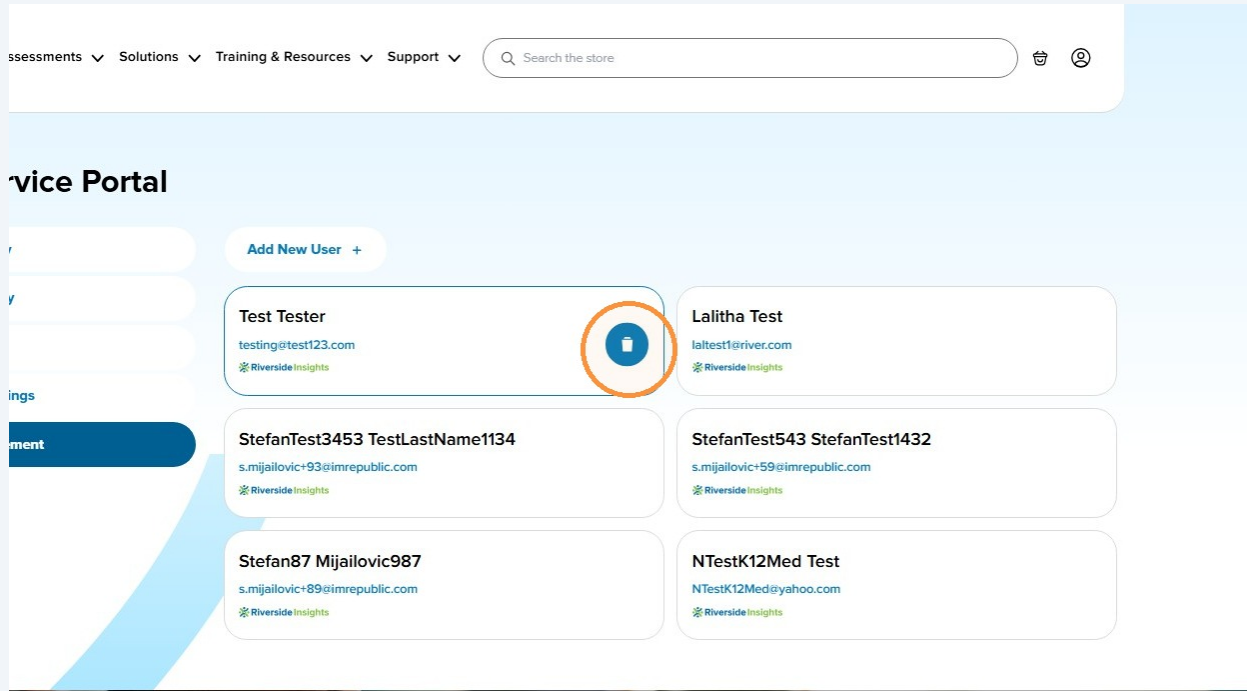
The screenshot shows a 'Send Invitation' form on the right side of a user management interface. The form has two input fields: 'Last name *' with the value 'Tester' and 'Email *' with the value 'testing@test.com'. Below the form is a blue button labeled 'Send Invitation', which is circled in orange. The background shows a list of users with names like 'Lalitha Test', 'StefanTest543 StefanTest1432', and 'NTestK12Med Test'. At the bottom, there is a banner for 'About This Application' with the text 'This is the about page of the application'.

9 The new user will then show up. The invitation to join has been sent to the email address for that new contact.

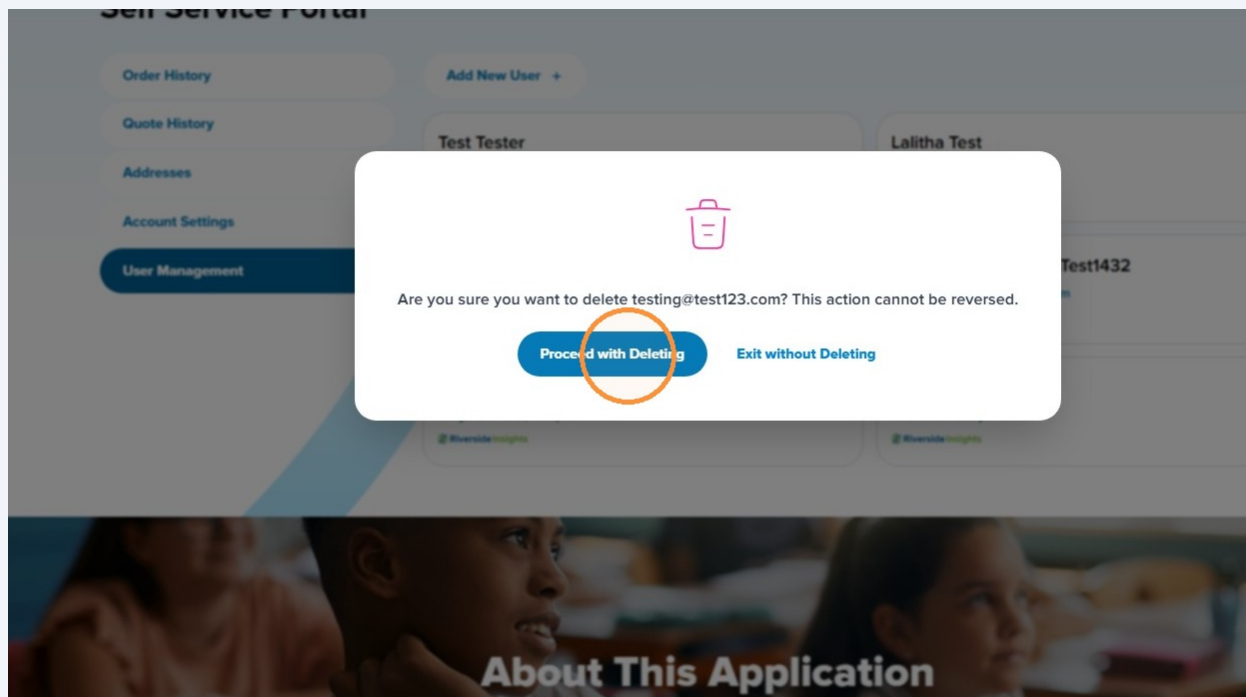
The screenshot shows the 'Self Service Portal' interface. On the left, there is a sidebar with navigation links: 'Order History', 'Quote History', 'Addresses', 'Account Settings', and 'User Management'. The main area displays a list of users. A new user, 'Test Tester', has been added and is highlighted with an orange circle. The user's email is 'testing@test123.com'. Other users in the list include 'Lalitha Test', 'StefanTest3453 TestLastName1134', 'StefanTest543 StefanTest1432', and 'NTestK12Med Test'. The top navigation bar includes links for 'Assessments', 'Solutions', 'Training & Resources', and 'Support', along with a search bar and user profile icon.

Deleting a User

- 10 To delete a user, hover over that user's card and select the trash icon.



11 Click "Proceed with Deleting"



12 A success message will populate in the top right corner.

