



RISE Up Platform FUNDER ADMINISTRATOR USER GUIDE

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NRF FOUNDATION
RISE UP

Funder Administrator User Guide

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Roles and Capabilities

	Funder Administrator	Group Administrator	Site Administrator	Teacher
Register for a new account		●		
Purchase RISE Up licenses and materials	●	●	●	
Get quotes for future orders	●	●	●	
Grant (allocate) licenses to third-party organizations and teachers	●			
Allocate licenses to affiliated sites		●		
Allocate licenses to affiliated teachers		●	●	
Assign courses and exams to students		●	●	●
Assign students to a site		●		
Assign students to a teacher		●	●	
Withdraw unused licenses	●	●	●	●
Set up partner sites		●		
Set up teacher accounts		●	●	
Set up student accounts individually or in batches		●	●	●
Manage your personal information	●	●	●	●
Change your password	●	●	●	●
Manage your organization's information	●	●	●	
View information about your associated groups	●		●	●
View information about your associated sites	●	●		●
View information about your associated teachers	●	●	●	
View information about your students		●	●	●

	Funder Administrator	Group Administrator	Site Administrator	Teacher
Request accommodations for students		●	●	●
Apply to be an in-person proctor		●	●	●
Proctor in-person exams		●	●	●
See outstanding invoices	●	●	●	
See your order history and past receipts	●	●	●	
See saved quotes	●	●	●	
Contact Customer Support to...	<ul style="list-style-type: none"> • Set up an account • Connect to other organizations to grant licenses to • Add additional administrators 	<ul style="list-style-type: none"> • Add additional administrators to your group or your sites • Make changes to sites and teachers 	<ul style="list-style-type: none"> • Add additional administrators to your site 	

Getting Started

Signing up as an organization:

1. Go to the signup page at <https://RISEUp.kaleidolearning.com/signup>.
2. Enter your organization's information. Fields with an asterisk * are required.
If an organization with that tax ID number already exists, the system will pop up a dialogue box indicating that and will not process the signup further.
(Note: If you want to add additional administrators for your organization, please contact the RISE Up Customer Support team by providing the following information: your full name, email address and organization name, as well as the full name and email address of the administrator you wish to add or remove.)

The screenshot shows the 'Organization Registration' form. At the top, there is a teal header with the RISE UP logo and the title 'Organization Registration'. Below the header, there is a brief description of RISE Up and a prompt to complete the information. The form is divided into two sections: 'Organization Information' (highlighted in teal) and 'Contact Information'. The 'Organization Information' section contains the following fields: Organization Name*, Organization Type*, Address Line 1*, Address Line 2, City*, Province/State*, Country* (with a dropdown menu showing 'United States of America'), Zip/Postal Code*, Phone Number*, Website, Federal Tax ID*, and Tax Exempt* (with a dropdown menu). A 'NEXT' button is located in the bottom right corner of the form.

Registration Page 1

3. Click **NEXT** in the lower right-hand corner to continue.
4. Enter your administrator's primary contact information
5. If your billing contact is different from your primary contact, enter the billing contact's information. If the billing and primary contact are the same, check the box that says "Same as Primary Contact".
6. When you have entered all your information, click **SUBMIT** in the lower right-hand corner.

Registration Page 2

7. Upon submitting the application, you have provisionally registered your organization in the platform. The RISE Up team will review the application as soon as possible.
8. When your application is approved, we will send an email to the designated contact person. The email will contain instructions on setting up a password and accessing the login portal. In the rare event that the application is not approved, we will promptly notify you via email, providing a detailed explanation.

Financial Set Up

The new RISE Up Platform is a new platform that is not affiliated with the previous platform, Penn Foster. As such, your organization may need financial details for our company in order to set us up and authorize us as a vendor for purchases. Two commonly requested documents are included below, but if you have any additional financial questions or requirements for your organization, please send your email to [mailto: Riseupaccounting@kaleidolearning.com](mailto:Riseupaccounting@kaleidolearning.com).

1. **Sole Source Letter:** This letter is to confirm that Kaleidoscope is the sole authorized vendor and sole supplier of the NRF Foundation RISE Up credentials. So purchases are made directly from Kaleidoscope Learning.
If you need a copy of our Sole Source Letter, please click [Sole Source Letter](#) to download it.
2. **W-9 Form:** Provides Taxpayer Identification Number and Certification.
If you need a copy of our W-9 form, please click [W-9 form](#) to download it.

Creating and Removing Other Administrators for Your Organization

To add additional administrators for your organization or to remove administrators from your organization, please contact the RISE Up Customer Support team and provide the following information: your full name, email address and organization name, as well as the full name and email address of the administrator you wish to add or remove.

Note that all administrators for your organization will have full access to the organizations' connections, account information (including credit cards), and license information, as well as all the permissions to purchase, allocate, and withdraw licenses for your organization.

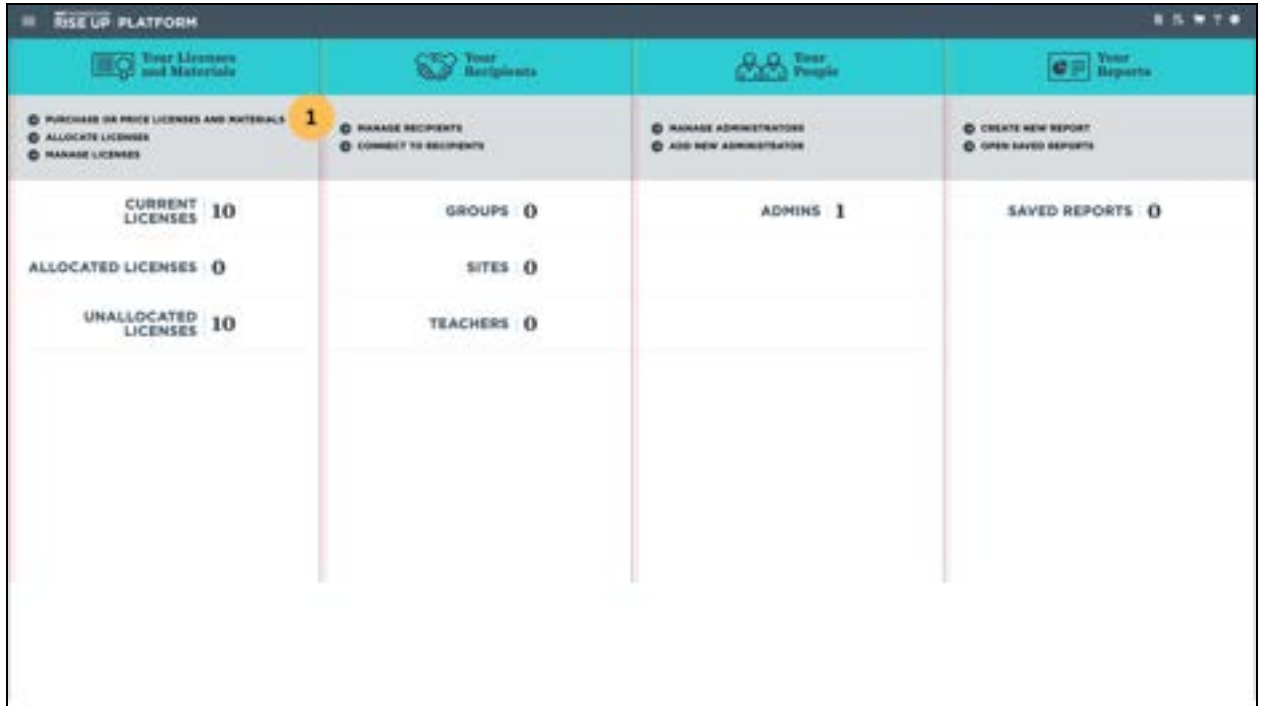
Connecting to Other Organizations

In order to give, or allocate, licenses to other organizations (for example: school districts, individual schools, or not-for-profit clubs), you need to be connected to them first. To do this, please contact the RISE Up customer support team and provide the following information: your full name, email address and organization name, as well as the name of the organization you wish to connect.

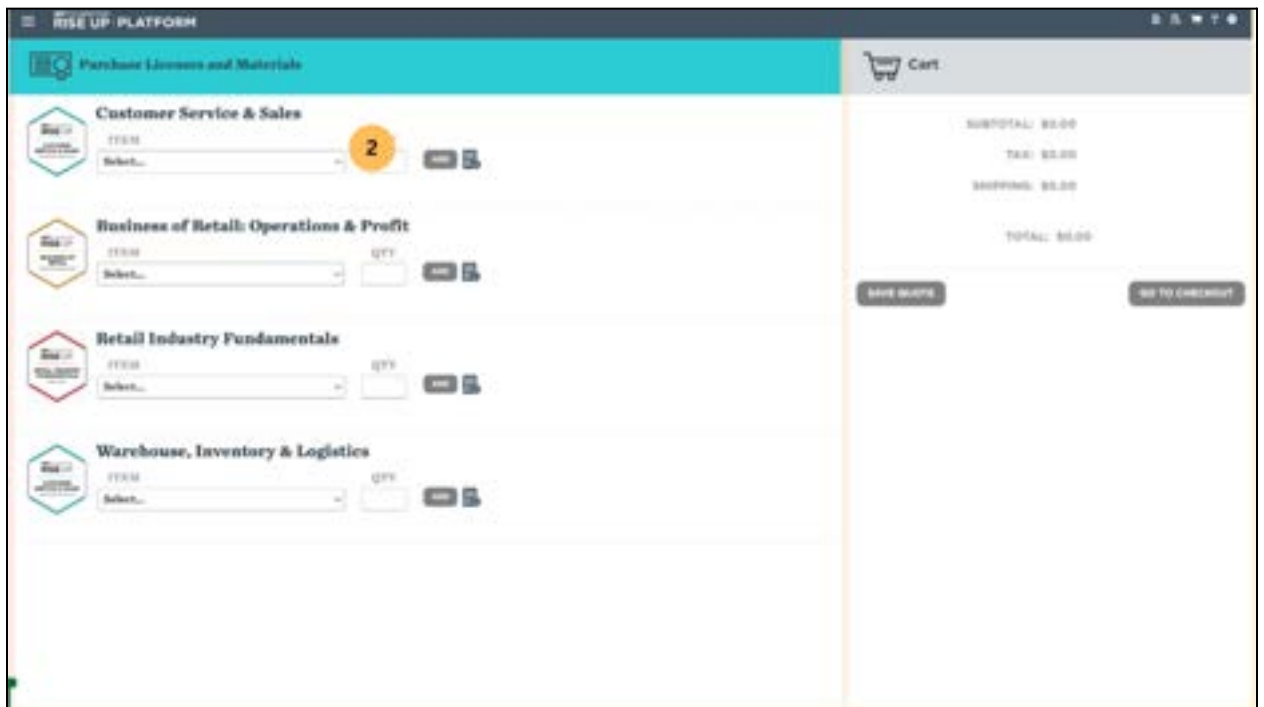
Purchasing Licenses and Materials

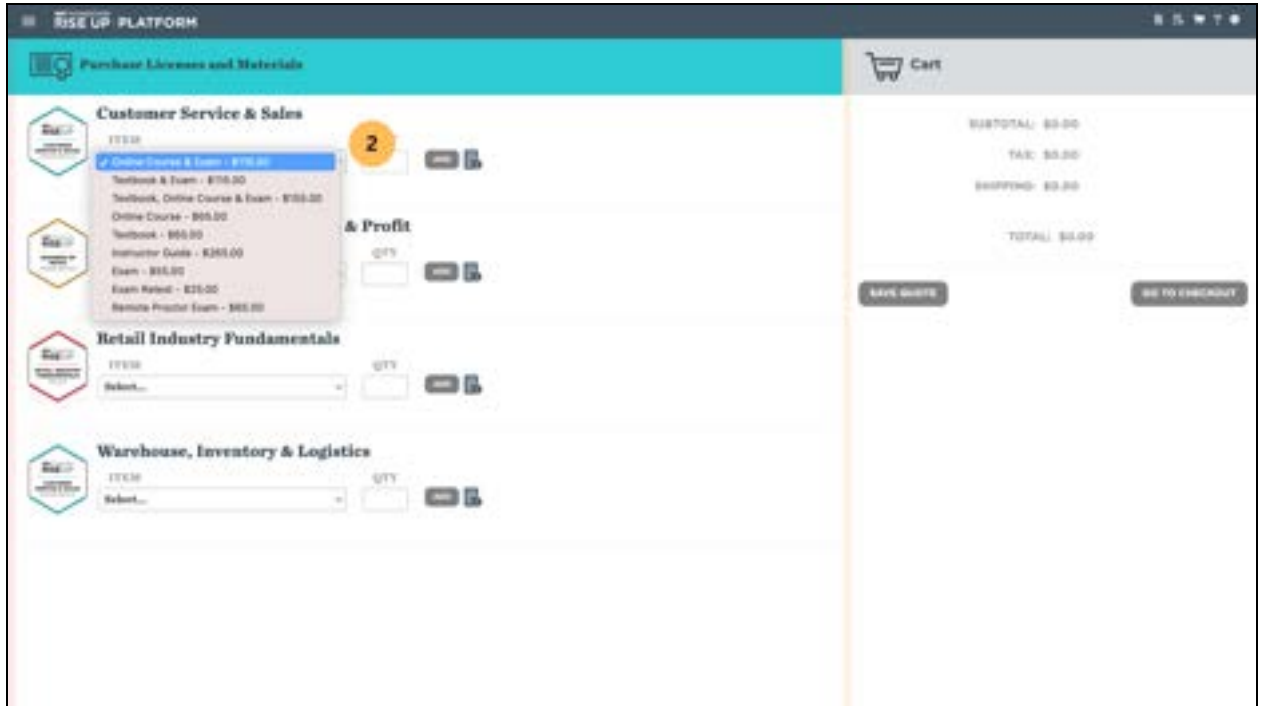
The RISE Up platform provides the ability for you to purchase program and exam licenses and materials.

1. Click **PURCHASE OR PRICE LICENSES AND MATERIALS** on the dashboard under the first column, **Your Licenses and Materials**, or select it from the menu in the upper-left corner to open the Purchase Licenses and Materials page.

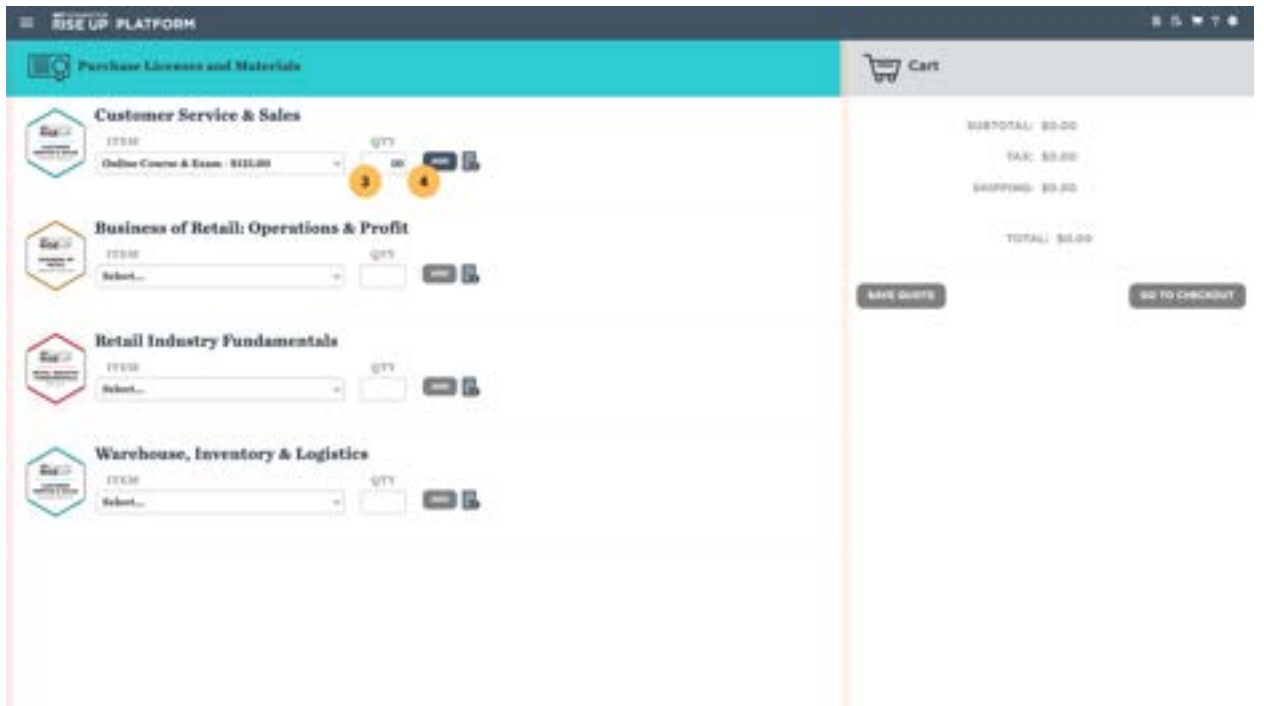


2. Select the ITEM(S) of program you would like to purchase.

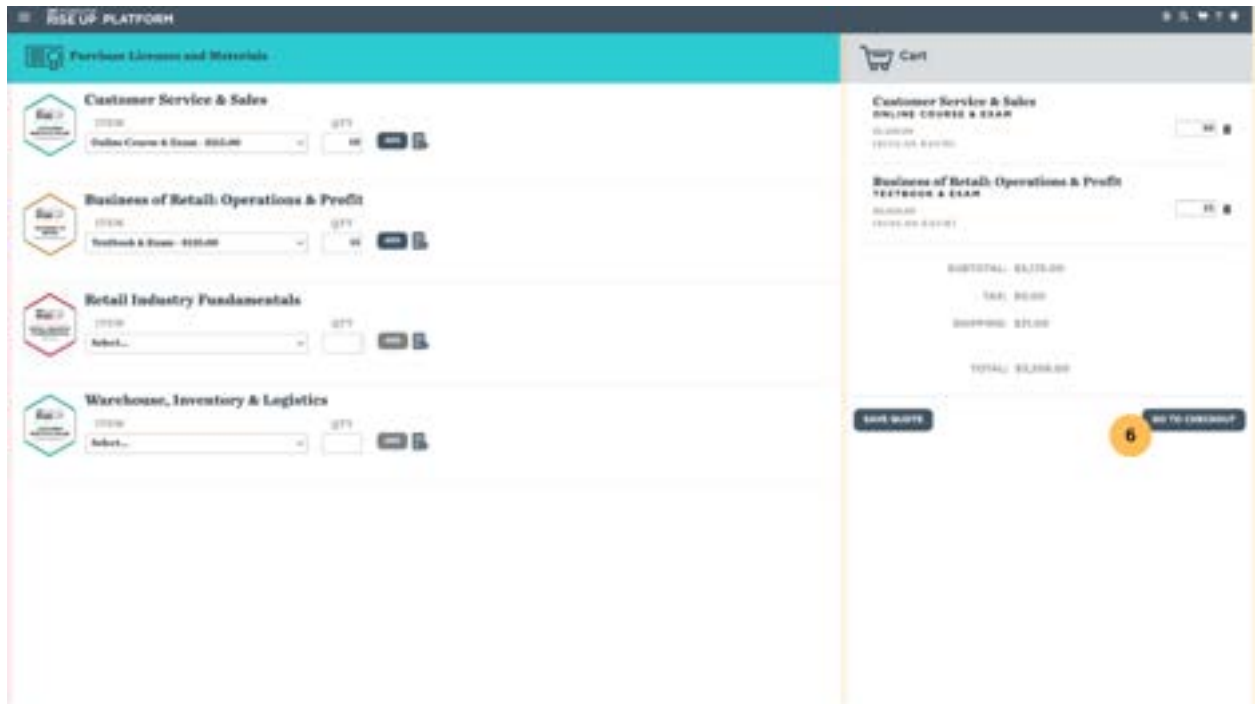




3. Enter the QUANTITY you would like to purchase.
4. Click **ADD** to add the items to your cart. The selected licenses and materials should be visible in your cart on the right-hand side.




5. To purchase additional items, repeat steps 2 - 4.
6. Click **GO TO CHECKOUT**.



7. On the Check Out page, select which payment method you'd like to use.
 - a. If you'd like to use a previously saved credit card, select it from the first drop-down menu.
 - b. If you'd like to add a new credit card, click **ADD NEW CREDIT CARD**. A dialog box asking you for the details of your new credit card will appear.
 - i. Fill in the credit card details.
 - ii. If you'd like to set this card as your new default payment method, leave the box checked. If not, uncheck the box.
 - iii. Click **SAVE CARD** to save your card details and proceed with your purchase.
 - c. If you'd like to invoice a purchase order (PO) purchase to a previously saved address, you can select it from the second drop-down menu.
 - d. If you'd like to invoice a purchase order (PO) purchase to a new billing address, click **ADD NEW PURCHASE ORDER (PO)**. A dialog box asking you for the PO details will appear.
 - i. Fill in the billing address and PO details.
 - ii. If you'd like to set this PO billing address as your new default billing address, make sure the box is checked.

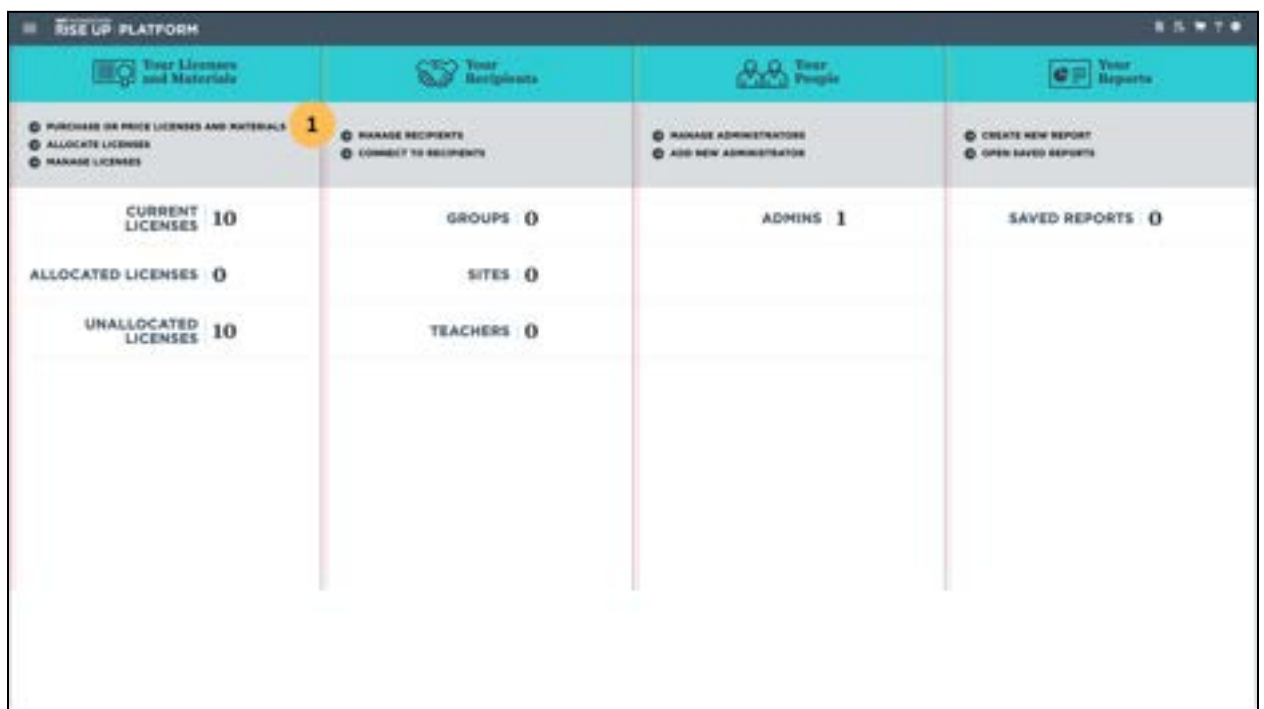
- iii. Click **SAVE CHANGES** to save your purchase order details and move forward with your purchase.

8. If there are physical items (like textbooks) in your order, select or enter a delivery address.
 - a. If a shipping address has already been entered for your account, you can select it from the list.
 - b. If there aren't any previously entered delivery addresses or if you want to use a new one, click **ADD NEW SHIPPING ADDRESS**. A dialog box will open.
 - i. Fill in the address details.
 - ii. Check if you want this to become your default shipping address.
 - iii. Click **SAVE**.
9. Click **PLACE ORDER** to complete your purchase. Upon successful payment, online courses and exams will be available immediately. You will receive an email confirmation of your purchase. If you paid by purchase order, an invoice will also be available by clicking  in the upper-right corner.

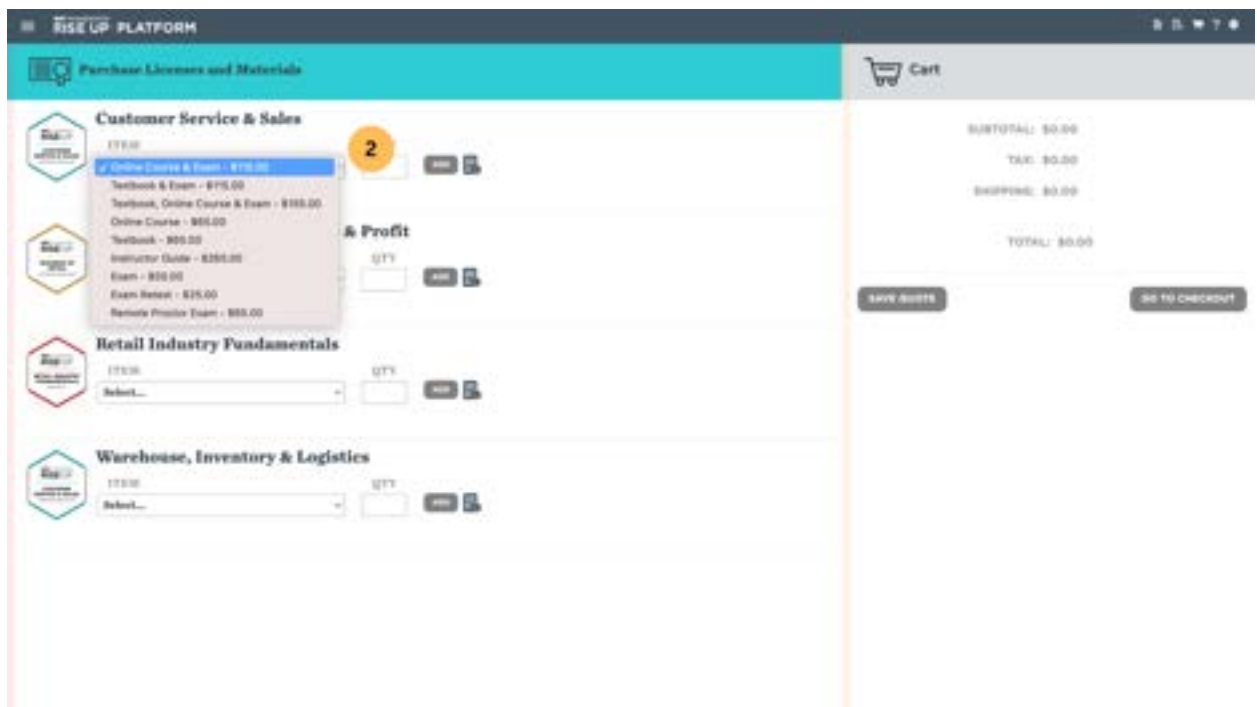
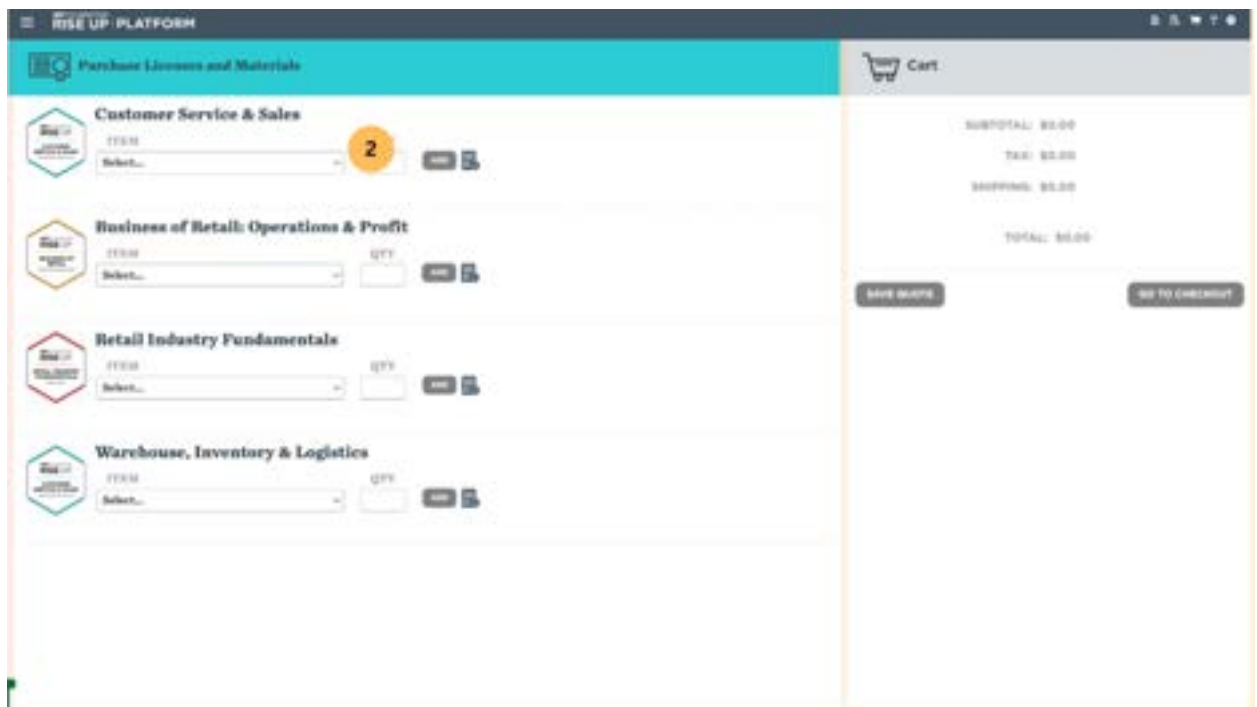
Pricing Licenses and Materials (Creating Quotes)

The RISE Up platform lets you create and save a quote to get a total cost for an order before proceeding with a purchase. You can then download the quote and share it if you need to get approval for an order, submit it for budgeting, or share with others in your organization.

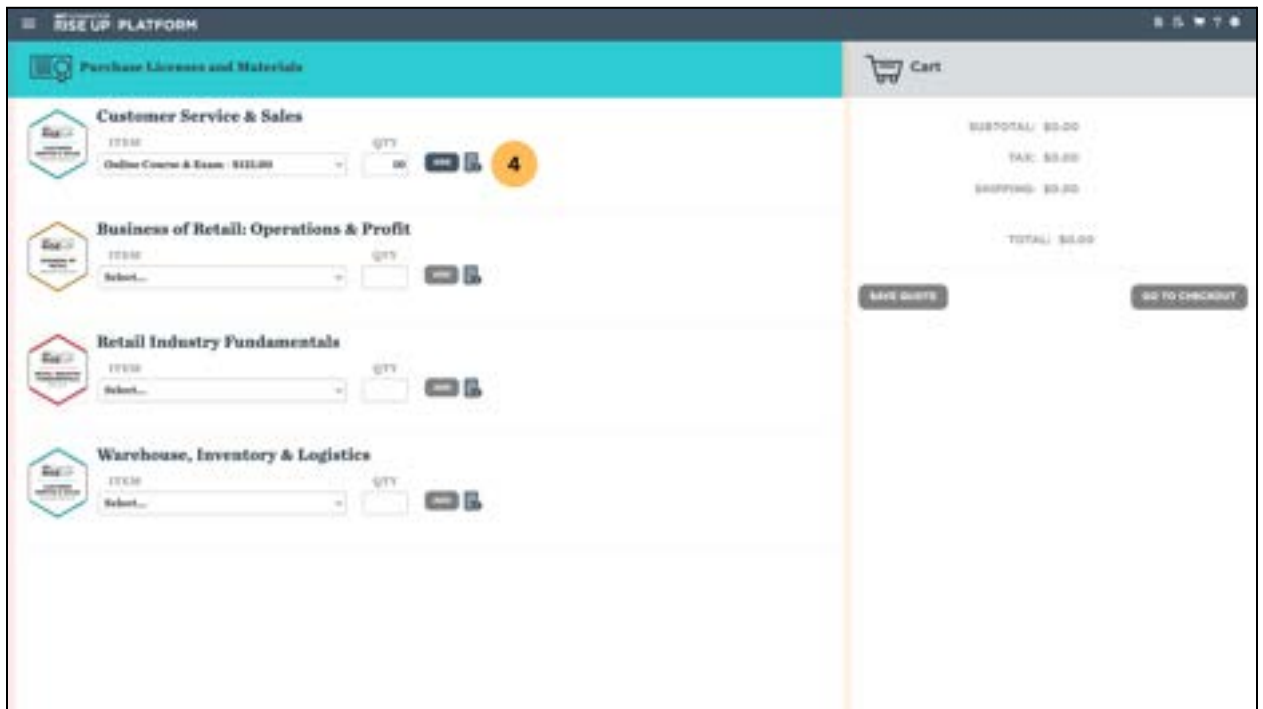
1. Click **PURCHASE OR PRICE LICENSES AND MATERIALS** on the dashboard under the first column, **Your Licenses and Materials**, or select it from the menu in the upper-left corner.



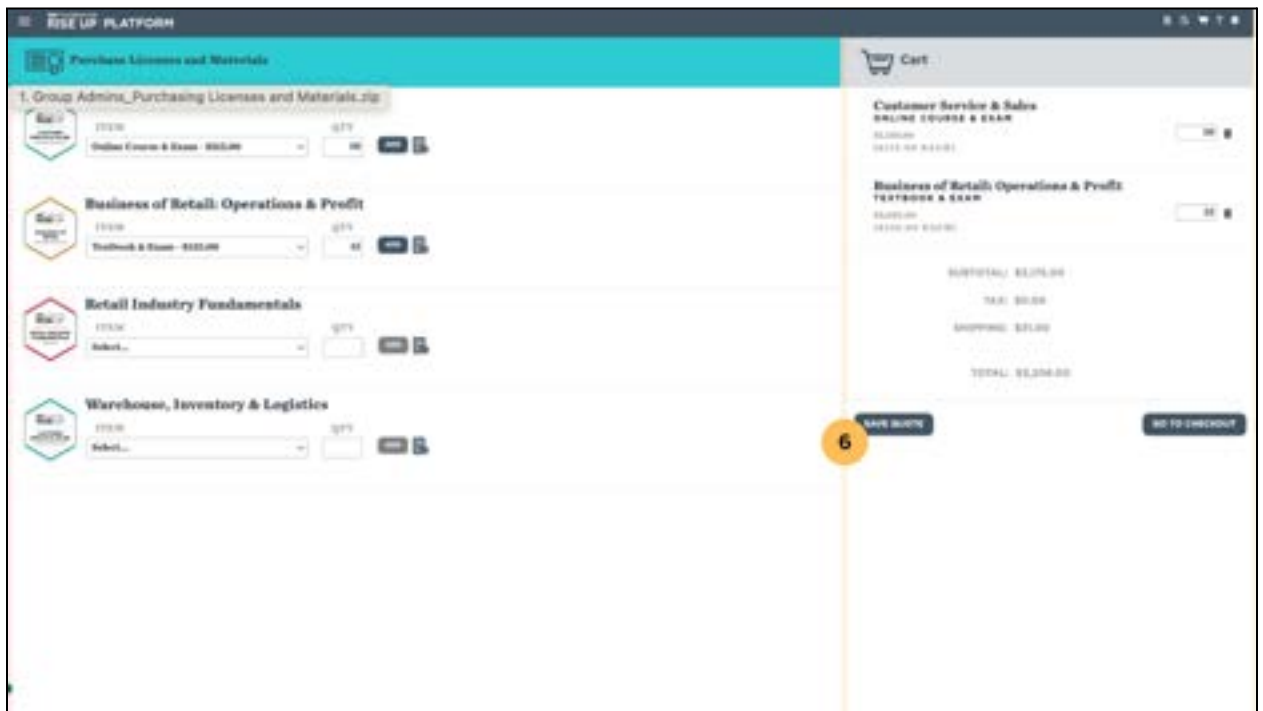
2. Select the ITEM(S) of program you want to add to your quote.



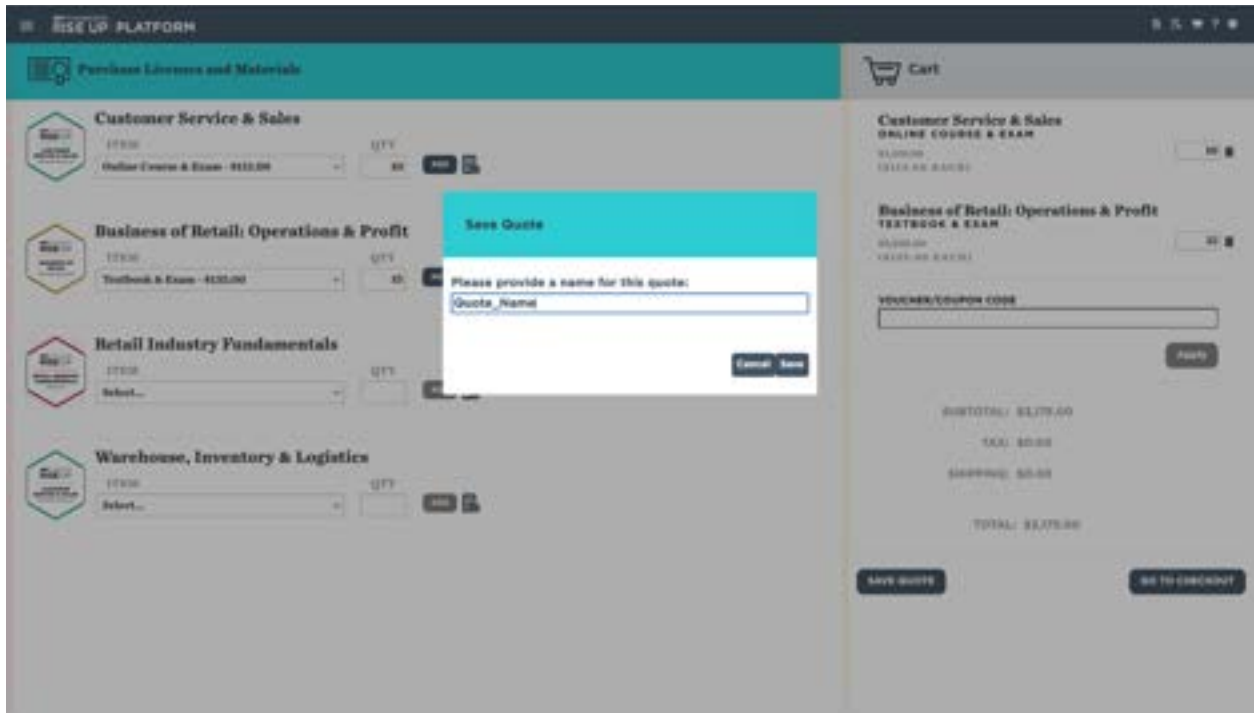
3. Enter the QUANTITY of the item you want to add to your quote.
4. Click **ADD** to add that program to your cart.



5. To add additional items, repeat steps 2-4.
6. Click **SAVE QUOTE**.




7. Enter a name for the quote.

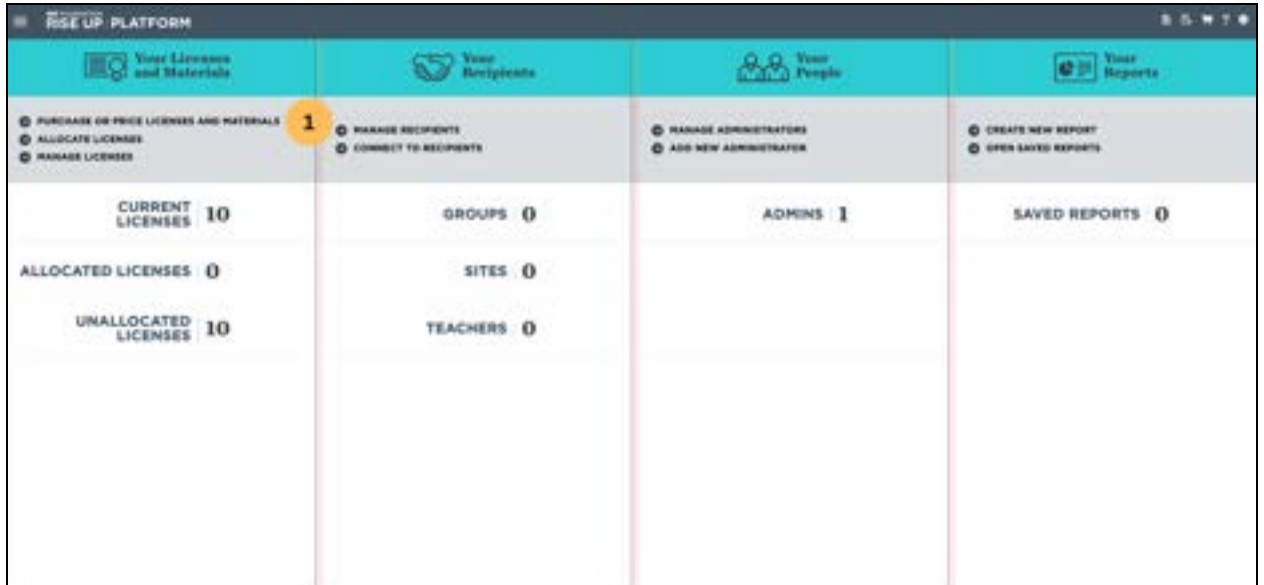


8. Click **Save**.

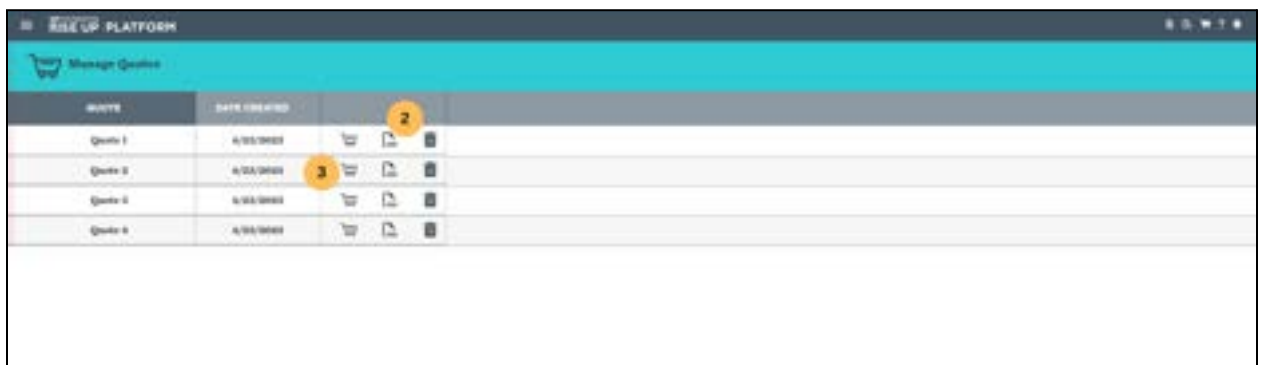
Purchasing Licenses and Materials from a Saved Quote

Once you've saved a quote, you can come back to it at any time to purchase the items.

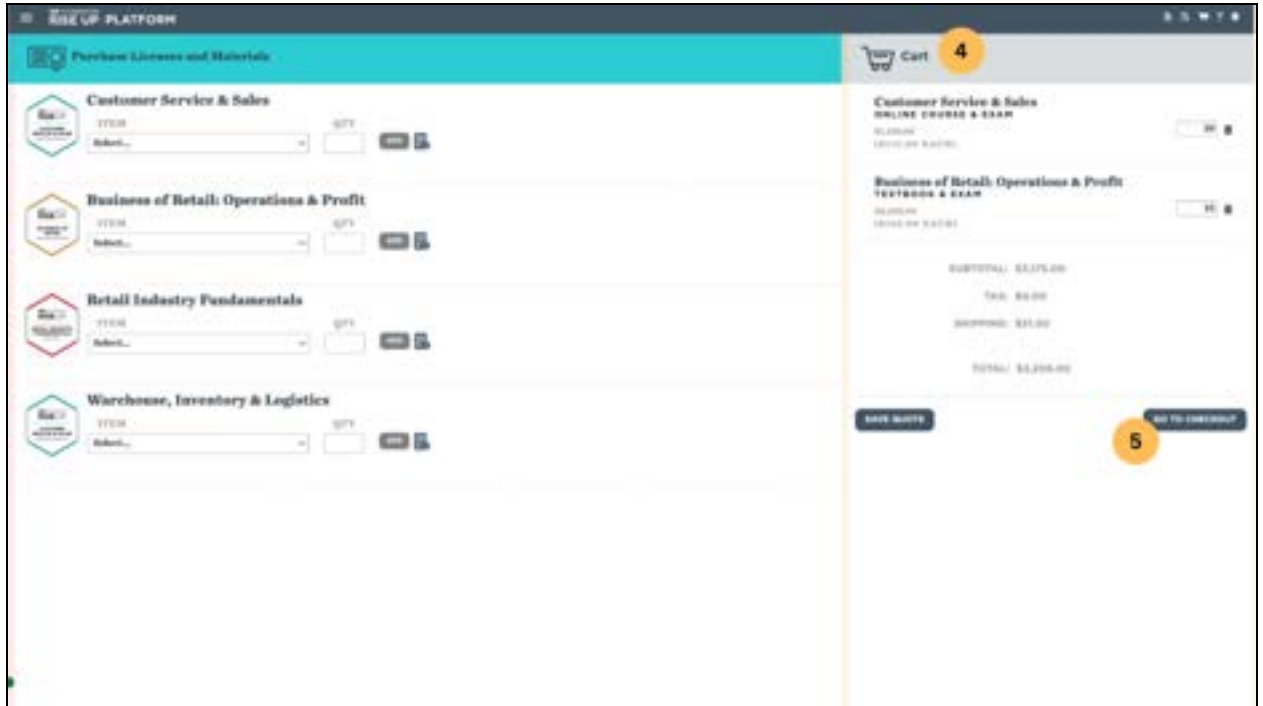
1. Click the Quote icon  to the left of the cart in the upper-right corner of any page to open the Manage Quotes page.



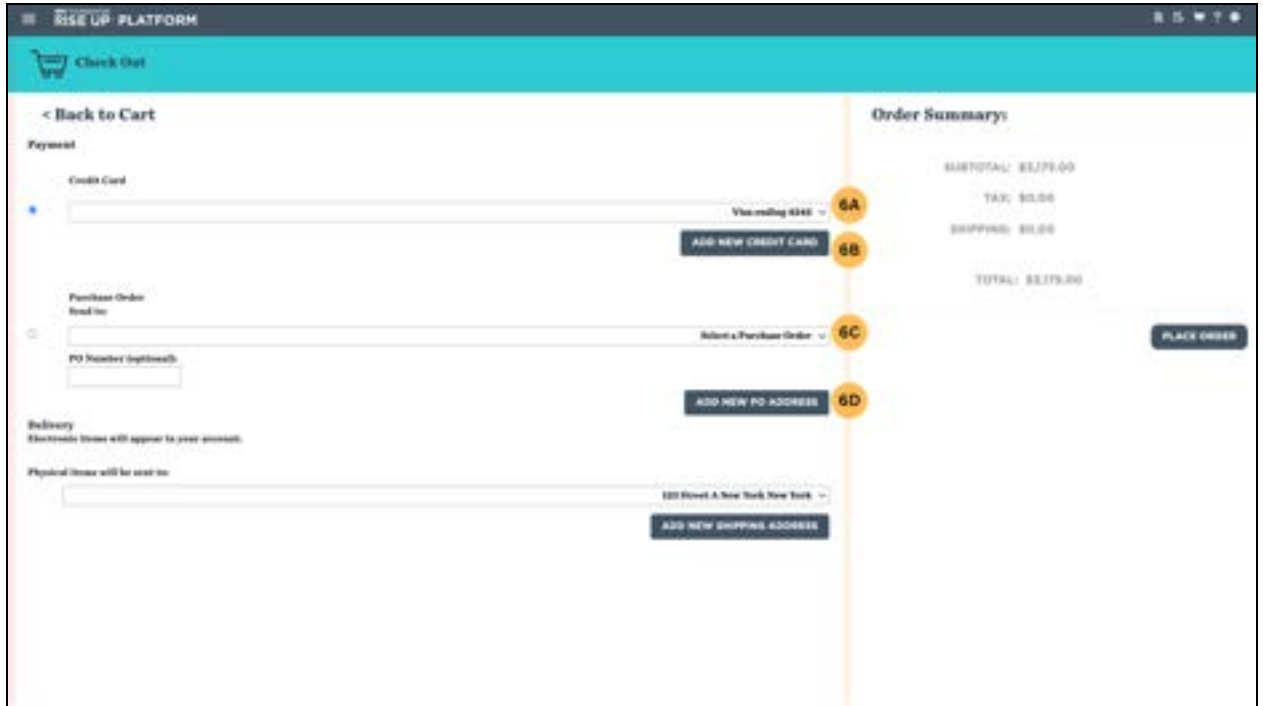
2. Select the quote you want to purchase; you can click on the quote icon to see the details for that quote.
3. Once you've selected the quote, click the cart icon to move the items from the quote into your cart. The Purchase or Price Licenses and Materials page will open, with the items from the quote in the cart.




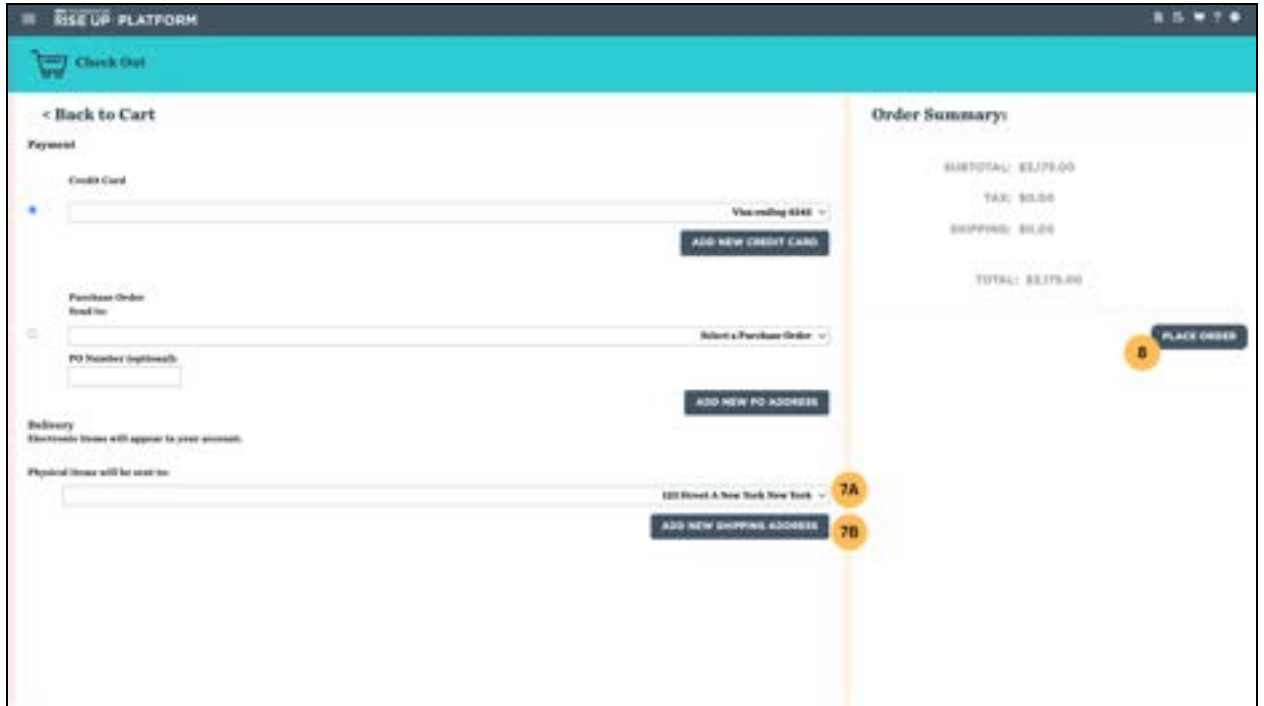
4. Make any adjustments to the items in the cart.
5. Click **GO TO CHECKOUT**.



6. On the Check Out page, select which payment method you'd like to use.
 - a. If you'd like to use a previously saved credit card, select it from the first drop-down menu.
 - b. If you'd like to add a new credit card, click **ADD NEW CREDIT CARD**. A dialog box asking you for the details of your new credit card will appear.
 - i. Fill in the credit card details.
 - ii. If you'd like to set this card as your new default payment method, leave the box checked. If not, uncheck the box.
 - iii. Click **SAVE CARD** to save your card details and move forward with your purchase.
 - c. If you'd like to invoice a purchase order (PO) purchase to a previously saved billing address, you can select it from the second drop-down menu.
 - d. If you'd like to invoice a purchase order (PO) purchase to a new billing address, click **ADD NEW PO Address**. A dialog box asking you for the PO address will appear.
 - i. Fill in the billing address and PO details.
 - ii. If you'd like to set this PO billing address as your new default billing address, make sure the box is checked.
 - iii. Click **SAVE CHANGES** to save your purchase order details and move forward with your purchase.




7. If there are physical items (like textbooks) in your order, select or enter a delivery address.
 - a. If a shipping address has already been entered for your account, you can select it from the list.
 - b. If there aren't any previously entered delivery addresses or if you want to use a new one, click **ADD NEW SHIPPING ADDRESS**. A dialog box will open.
 - i. Fill in the address.
 - ii. Check if you want this to become your default shipping address.
 - iii. Click **SAVE**.
8. Click **PLACE ORDER** to complete your purchase. Online courses and exams will be available immediately. You will receive an email confirmation of your purchase. If you paid by purchase order, an invoice will also be available by clicking  in the upper-right corner.



9. If you'd like, you can return to Manage Quotes and delete the quote now that you have purchased it.

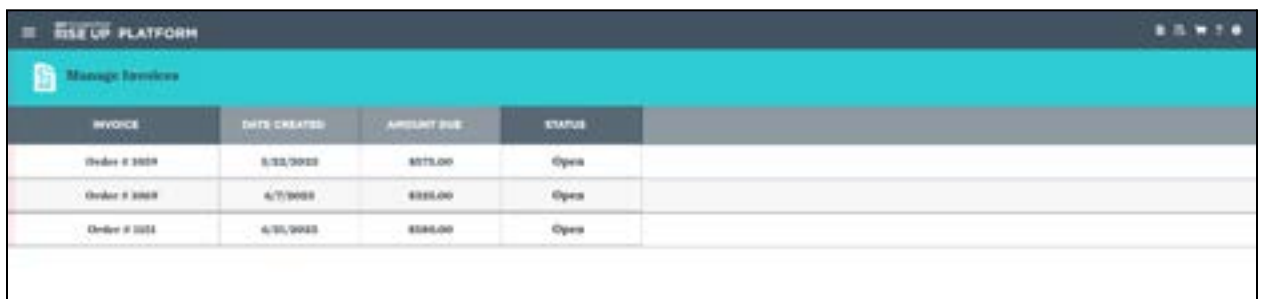
Paying an Invoice

If you've made a purchase with a Purchase Order (PO), an invoice will be sent to you by email. You can also access it on the Manage Invoices page.

1. Click the Invoices icon  in the upper-right corner of any page to open the Manage Invoices page.



2. Select the invoice you want to review or pay.
3. Click on the invoice to see the full invoice.



The screenshot shows the 'Manage Invoices' page. It features a table with the following columns: INVOICE, DATE CREATED, AMOUNT DUE, and STATUS. The table contains three rows of data:

INVOICE	DATE CREATED	AMOUNT DUE	STATUS
Order # 3004	5/22/2023	\$075.00	Open
Order # 3005	4/7/2023	\$225.00	Open
Order # 3006	4/30/2023	\$340.00	Open

4. Remit payment by mailing a check to the address listed or via wire transfer sending to the account details noted on the invoice. If you are unable to locate the the payment information, please follow the payment instructions [here](#).

Allocating Licenses

After licenses are purchased, you can allocate them to organizations or teachers you are connected to. This allows them to assign the courses or exams to their students. You will be able to see the status of these licenses, and you can withdraw them from the organizations if needed.

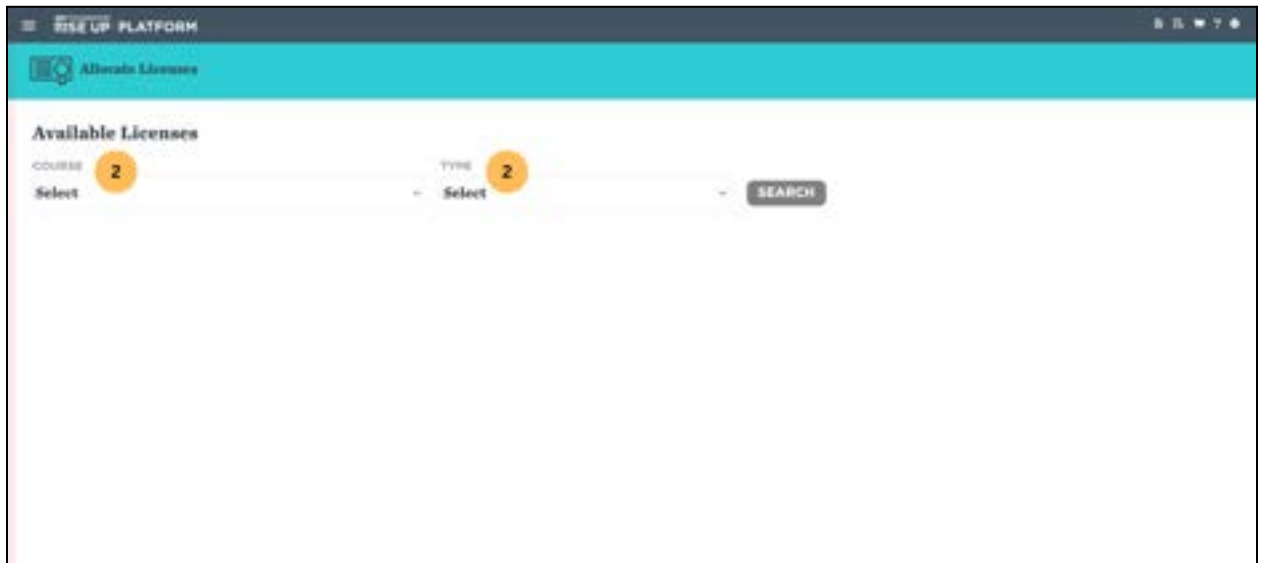
Allocating multiple licenses of the same kind at once can be done from the Allocate Licenses page. Allocating a selection of specific licenses can be done from the Manage Licenses page.

To allocate multiple licenses:

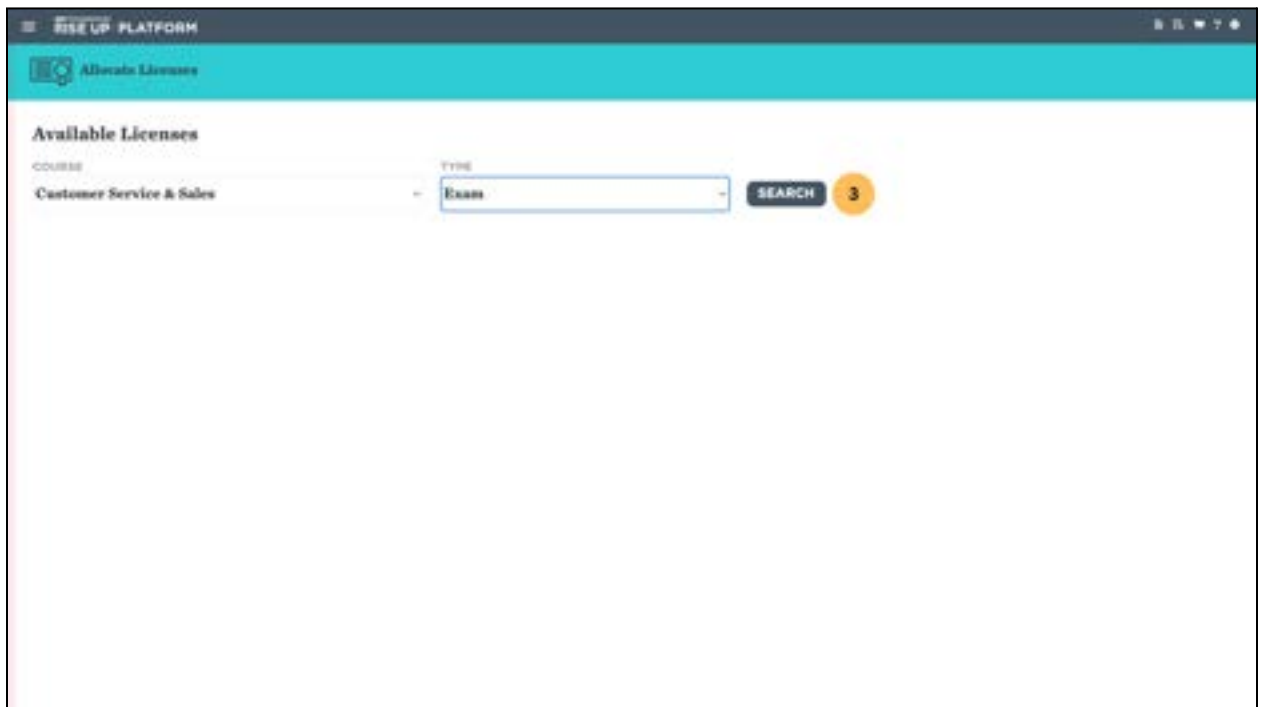
1. Click **ALLOCATE LICENSES** on the dashboard in the first column under **Your Licenses and Materials** or select it from the menu in the upper-left corner. You can also click **GO TO LICENSE ALLOCATION** from the Manage Licenses Page.



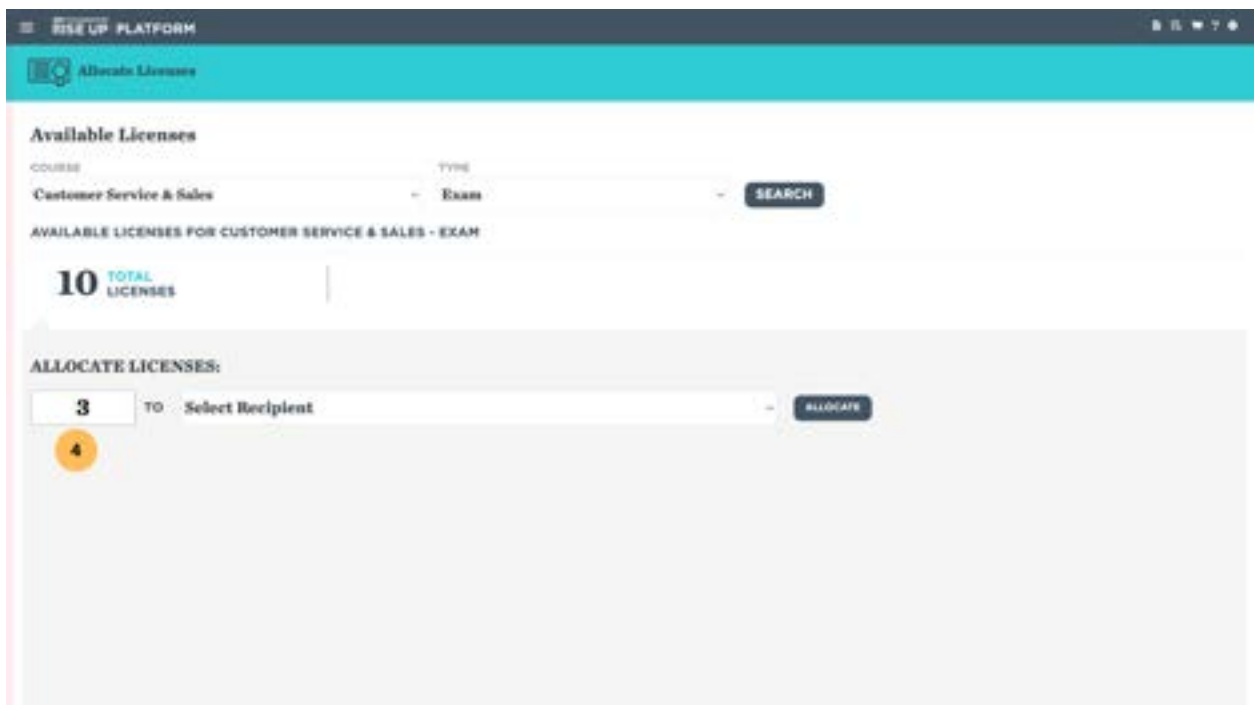
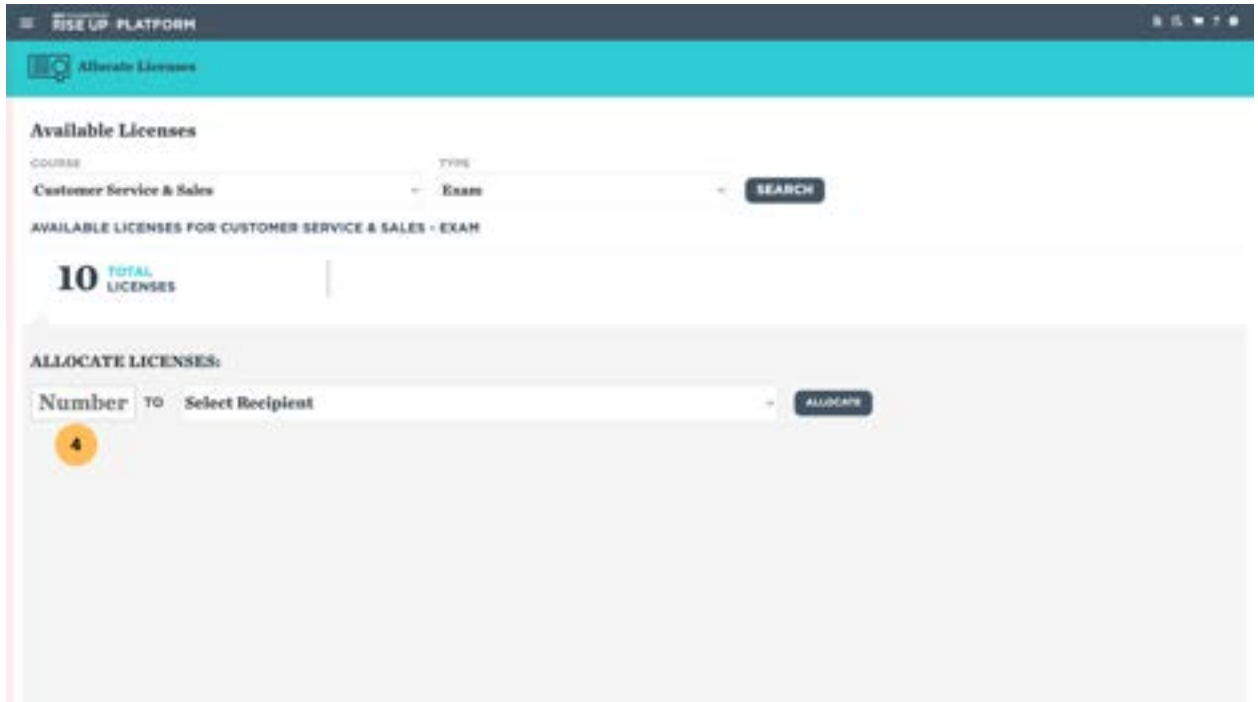
2. On the Allocate Licenses page, select the course name and license type you want to allocate.



3. Click **SEARCH** to find the number of licenses available to allocate.

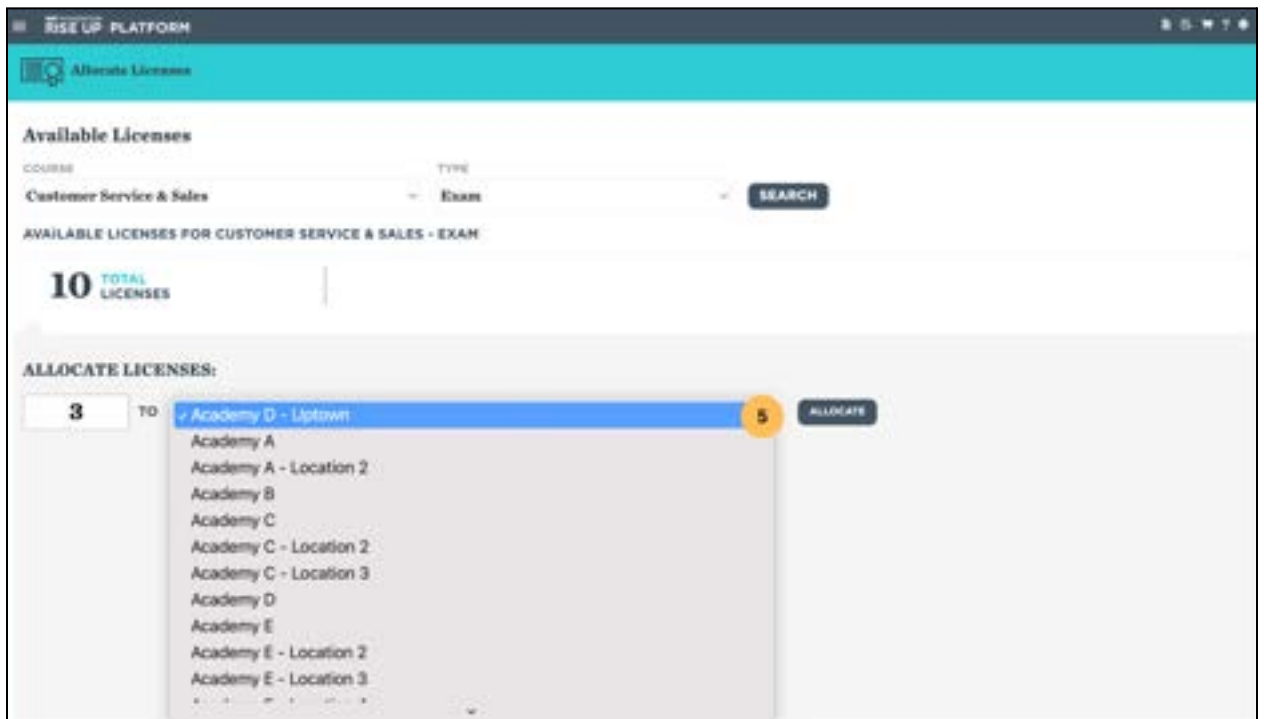


4. Enter the number of licenses you'd like to allocate into the **Quantity** field. You can only allocate up to as many licenses that are shown as available in the search results.

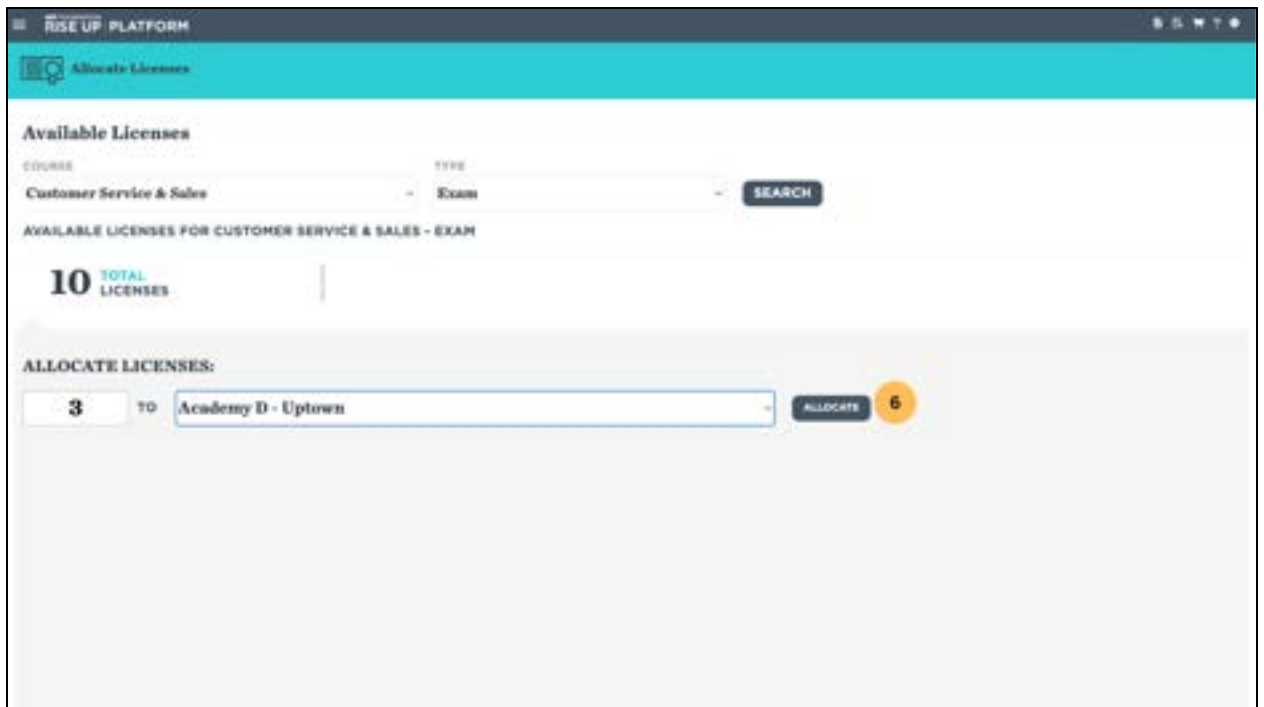


5. Select the organization or teacher you wish to allocate the licenses to from the Select Recipient drop-down menu. Please contact the RISE Up customer support team if you would like to allocate licenses to a recipient not in this list. (Kindly provide the following information to our support team: your full name, email address and organization name,

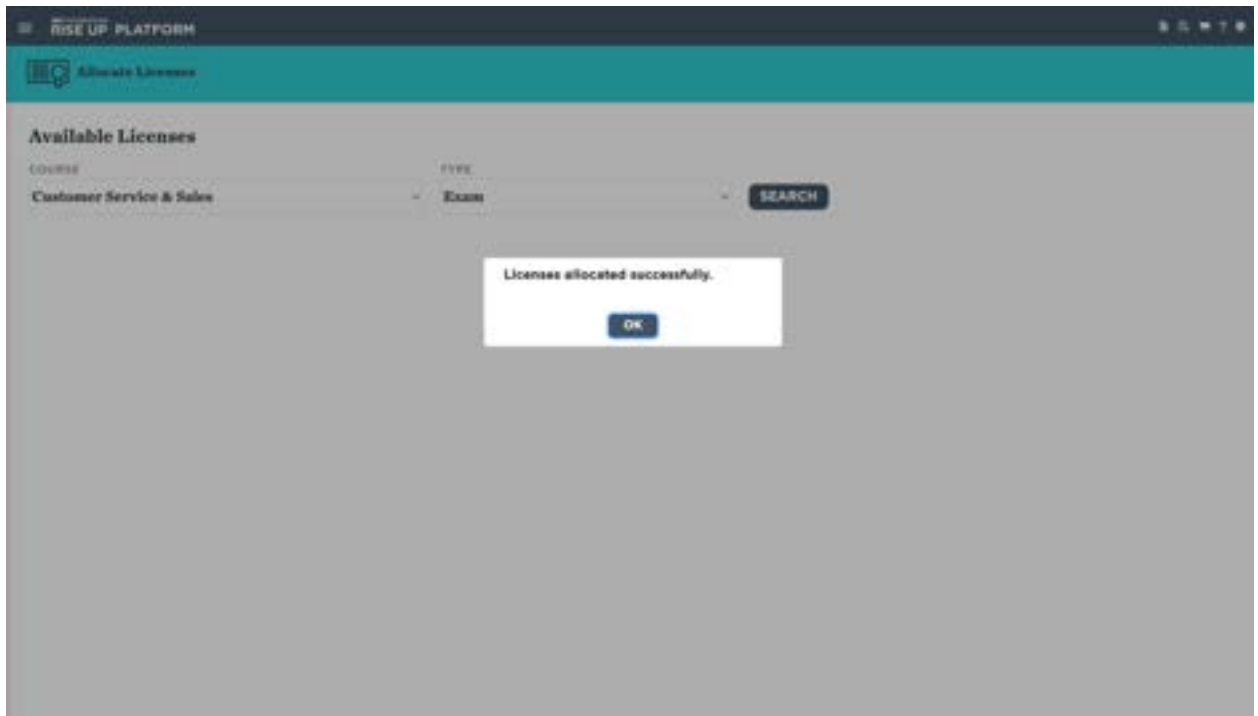
as well as the name and the email address of the recipient you wish to allocate licenses to).



6. Click **ALLOCATE** to allocate those licenses to the selected recipient.



7. A dialog box confirming that the licenses have been successfully allocated will appear. Click **OK** to return to the Allocate Licenses menu. These licenses will be deducted from your available licenses and will be available to the recipient immediately, and they will still appear in your list on the Manage Licenses page in case you want to withdraw them or check their status.



To allocate specific licenses:

1. Click **MANAGE LICENSES** on the dashboard, or select it from the menu in the upper-left corner.



2. On the Manage Licenses page, identify and select the license(s) you want to allocate.

ID	COURSE/EXAM	TYPE	GROUP	SITE	TEACHER	EXAM DATE	STATUS
01	1007	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned
02	1008	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned
03	1009	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned
04	1040	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned
05	1041	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned
06	1042	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned
07	1043	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned
08	1044	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned
09	1045	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned
10	1046	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned
11	9427	Customer Service & Sales	Online Course	N/A	N/A	07/31/24	Unassigned
12	9428	Customer Service & Sales	Exam	N/A	N/A	07/31/24	Unassigned
13	9429	Customer Service & Sales	Online Course	N/A	N/A	07/31/24	Unassigned
14	9430	Customer Service & Sales	Exam	N/A	N/A	07/31/24	Unassigned

To help you find the licenses, you can:

- Use the **SHOW/HIDE FIELDS** feature to see more or less about each license;

- Use **FILTER** to help narrow down the list of licenses; and
- Click on the column headings to sort the list of licenses.

Click on the checkbox in the far left column for each license you wish to select. The number of licenses selected is displayed below the menu option.

ID	COURSE/SEAN	TYPE	GROUP	SITE	TEACHER	EXN DATE	STATUS
01	1007	Customer Service & Sales	Exam	N/A	N/A	06/21/24	Unassigned
02	1008	Customer Service & Sales	Exam	N/A	N/A	06/21/24	Unassigned
03	1009	Customer Service & Sales	Exam	N/A	N/A	06/21/24	Unassigned
04	1060	Customer Service & Sales	Exam	N/A	N/A	06/21/24	Unassigned
05	1061	Customer Service & Sales	Exam	N/A	N/A	06/21/24	Unassigned
06	1062	Customer Service & Sales	Exam	N/A	N/A	06/21/24	Unassigned
07	1063	Customer Service & Sales	Exam	N/A	N/A	06/21/24	Unassigned
08	1064	Customer Service & Sales	Exam	N/A	N/A	06/21/24	Unassigned
09	1065	Customer Service & Sales	Exam	N/A	N/A	06/21/24	Unassigned
10	1066	Customer Service & Sales	Exam	N/A	N/A	06/21/24	Unassigned
11	9427	Customer Service & Sales	Hybrid Course	N/A	N/A	07/11/24	Unassigned
12	9428	Customer Service & Sales	Exam	N/A	N/A	07/11/24	Unassigned
13	9429	Customer Service & Sales	Hybrid Course	N/A	N/A	07/11/24	Unassigned
14	9460	Customer Service & Sales	Exam	N/A	N/A	07/11/24	Unassigned

3. Click **ALLOCATE SELECTED LICENSES** from the menu options. A dialog box with available organizations will appear.

ISE UP PLATFORM

Manage Licenses

SHOW/Hide FIELDS: 8/11 Fields shown - 45 licenses shown | FILTER: 0 filters applied | OPEN TEMPLATE | SAVE TEMPLATE | SAVE AS PDF | DOWNLOAD AS: EXCEL FOR EXCEL

WITHDRAW SELECTED LICENSES: 2 licenses selected | **3** ALLOCATE SELECTED LICENSES: 2 licenses selected | GO TO LICENSE ALLOCATION

ID	ISE	COURSE/EXAM	TYPE	GROUP	ITE	TEACHER	EXP. DATE	STATUS	
<input checked="" type="checkbox"/>	01	1007	Customer Service & Sales	Exam	N/A	N/A	06/31/24	Unassigned	
<input checked="" type="checkbox"/>	02	1008	Customer Service & Sales	Exam	N/A	N/A	06/31/24	Unassigned	
<input type="checkbox"/>	03	1009	Customer Service & Sales	Exam	N/A	N/A	06/31/24	Unassigned	
<input type="checkbox"/>	04	1000	Customer Service & Sales	Exam	N/A	N/A	06/31/24	Unassigned	
<input type="checkbox"/>	05	1001	Customer Service & Sales	Exam	N/A	N/A	06/31/24	Unassigned	
<input type="checkbox"/>	06	1002	Customer Service & Sales	Exam	N/A	N/A	06/31/24	Unassigned	
<input type="checkbox"/>	07	1003	Customer Service & Sales	Exam	N/A	N/A	06/31/24	Unassigned	
<input type="checkbox"/>	08	1004	Customer Service & Sales	Exam	N/A	N/A	06/31/24	Unassigned	
<input type="checkbox"/>	09	1005	Customer Service & Sales	Exam	N/A	N/A	06/31/24	Unassigned	
<input type="checkbox"/>	10	1006	Customer Service & Sales	Exam	N/A	N/A	06/31/24	Unassigned	
<input type="checkbox"/>	11	9427	Customer Service & Sales	Online Course	N/A	N/A	07/31/24	Unassigned	
<input type="checkbox"/>	12	9428	Customer Service & Sales	Exam	N/A	N/A	07/31/24	Unassigned	
<input type="checkbox"/>	13	9429	Customer Service & Sales	Online Course	N/A	N/A	07/31/24	Unassigned	
<input type="checkbox"/>	14	9430	Customer Service & Sales	Exam	N/A	N/A	07/31/24	Unassigned	

- Select the organization you'd like to allocate the licenses to from the drop-down menu. Please contact Customer Support if you would like to allocate licenses to a recipient not in this list . (Kindly provide the following information to our support team: your full name, email address and organization name, as well as the name and the email address of the recipient you wish to allocate licenses to).
- Click **ALLOCATE**. These licenses will be available to the recipient immediately, and they will still appear in your list on the Manage Licenses page in case you want to check their status or withdraw them.



Withdrawing Licenses

If you want to take back an unused license from someone you allocated it to, you can withdraw it from the Manage Licenses page.

1. Click **MANAGE LICENSES** on the dashboard, or select it from the menu in the upper-left corner.



- On the Manage Licenses page, identify the license(s) you want to withdraw. To help you find the licenses, you can:

The screenshot shows the Manage Licenses page with a table of licenses. The table has the following columns: ID, COURSE/YEAR, TYPE, GROUP, SITE, TEACHER, EXP. DATE, and STATUS. The table contains 14 rows of license data.

ID	COURSE/YEAR	TYPE	GROUP	SITE	TEACHER	EXP. DATE	STATUS
81	2408 Customer Service & Sales	Online Course	Hang's Test Group 222	82 Test PM		06/18/24	Allocated/Completed
82	2409 Customer Service & Sales	Online Course	Hang's Test Group 222	82 Test PM		06/18/24	Allocated/Completed
83	2400 Retail Industry Fundamentals	Exam	Hang's Test Group 222	82 Test PM		06/18/24	Allocated/Completed
84	2411 Retail Industry Fundamentals	Exam	Hang's Test Group 222	82 Test PM		06/18/24	Allocated/Completed
85	2417 Customer Service & Sales	Remote Proctor Exam	Hang's Test Group 222	82 Test PM		06/18/24	Allocated/Completed
86	2438 Customer Service & Sales	Remote Proctor Exam	Hang's Test Group 222	N/A		06/18/24	Unassigned
87	2796 Retail Industry Fundamentals	Online Course	Hang's Test Group 222	N/A		06/27/24	Unassigned
88	2797 Retail Industry Fundamentals	Exam	Hang's Test Group 222	N/A		06/27/24	Unassigned
89	2798 Retail Industry Fundamentals	Online Course	Hang's Test Group 222	N/A		06/27/24	Unassigned
90	2799 Retail Industry Fundamentals	Exam	Hang's Test Group 222	N/A		06/27/24	Unassigned
91	2800 Retail Industry Fundamentals	Online Course	Hang's Test Group 222	N/A		06/27/24	Unassigned
92	2801 Retail Industry Fundamentals	Exam	Hang's Test Group 222	N/A		06/27/24	Unassigned
93	2802 Retail Industry Fundamentals	Online Course	Hang's Test Group 222	N/A		06/27/24	Unassigned
94	2803 Retail Industry Fundamentals	Exam	Hang's Test Group 222	N/A		06/27/24	Unassigned

- Use the **SHOW/HIDE FIELDS** feature to see more or less about each license;
- Use **FILTER** to help narrow down the list of licenses; and
- Click on the column headings to sort the list of licenses.

Click the checkbox in the far left column for each license you wish to select.

#	ID	COURSE/TEAM	TYPE	GROUP	SITE	TEACHER	EXP. DATE	STATUS	
<input checked="" type="checkbox"/>	01	2408	Customer Service & Sales	Online Course	King's Test Group 222	02 Test PM	06/19/24	Allocated/Unassigned	
<input checked="" type="checkbox"/>	02	2409	Customer Service & Sales	Online Course	King's Test Group 222	02 Test PM	06/19/24	Allocated/Unassigned	
<input checked="" type="checkbox"/>	03	2400	Retail Industry Fundamentals	Exam	King's Test Group 222	02 Test PM	06/19/24	Allocated/Unassigned	
<input type="checkbox"/>	04	2411	Retail Industry Fundamentals	Exam	King's Test Group 222	02 Test PM	06/19/24	Allocated/Unassigned	
<input type="checkbox"/>	05	2407	Customer Service & Sales	Remote Proctor Exam	King's Test Group 222	02 Test PM	06/19/24	Allocated/Unassigned	
<input type="checkbox"/>	06	2408	Customer Service & Sales	Remote Proctor Exam	King's Test Group 222	N/A	06/19/24	Unassigned	
<input type="checkbox"/>	07	2796	Retail Industry Fundamentals	Online Course	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	08	2797	Retail Industry Fundamentals	Exam	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	09	2796	Retail Industry Fundamentals	Online Course	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	10	2799	Retail Industry Fundamentals	Exam	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	11	2800	Retail Industry Fundamentals	Online Course	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	12	2801	Retail Industry Fundamentals	Exam	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	13	2802	Retail Industry Fundamentals	Online Course	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	14	2803	Retail Industry Fundamentals	Exam	King's Test Group 222	N/A	06/27/24	Unassigned	

- Click **WITHDRAW SELECTED LICENSES**. The number of licenses selected is displayed as the subtext below.

#	ID	COURSE/TEAM	TYPE	GROUP	SITE	TEACHER	EXP. DATE	STATUS	
<input checked="" type="checkbox"/>	01	2408	Customer Service & Sales	Online Course	King's Test Group 222	02 Test PM	06/19/24	Allocated/Unassigned	
<input checked="" type="checkbox"/>	02	2409	Customer Service & Sales	Online Course	King's Test Group 222	02 Test PM	06/19/24	Allocated/Unassigned	
<input checked="" type="checkbox"/>	03	2400	Retail Industry Fundamentals	Exam	King's Test Group 222	02 Test PM	06/19/24	Allocated/Unassigned	
<input type="checkbox"/>	04	2411	Retail Industry Fundamentals	Exam	King's Test Group 222	02 Test PM	06/19/24	Allocated/Unassigned	
<input type="checkbox"/>	05	2407	Customer Service & Sales	Remote Proctor Exam	King's Test Group 222	02 Test PM	06/19/24	Allocated/Unassigned	
<input type="checkbox"/>	06	2408	Customer Service & Sales	Remote Proctor Exam	King's Test Group 222	N/A	06/19/24	Unassigned	
<input type="checkbox"/>	07	2796	Retail Industry Fundamentals	Online Course	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	08	2797	Retail Industry Fundamentals	Exam	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	09	2796	Retail Industry Fundamentals	Online Course	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	10	2799	Retail Industry Fundamentals	Exam	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	11	2800	Retail Industry Fundamentals	Online Course	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	12	2801	Retail Industry Fundamentals	Exam	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	13	2802	Retail Industry Fundamentals	Online Course	King's Test Group 222	N/A	06/27/24	Unassigned	
<input type="checkbox"/>	14	2803	Retail Industry Fundamentals	Exam	King's Test Group 222	N/A	06/27/24	Unassigned	


4. A dialog box asking if you want to withdraw the selected licenses will appear. Click **YES** to confirm. These licenses will return to your pool of unallocated licenses.

Viewing License Information

The Manage Licenses page shows you useful information about your licenses, like status and expiration date. It also lets you allocate and withdraw licenses.

1. Click **MANAGE LICENSES** on the dashboard, or select it from the menu in the upper-left corner.



2. On the Manage Licenses page, you will find an information icon  in the far right column for each license. Click the information icon and then a dialog box will open, providing you with detailed information about the selected license.

RISE UP PLATFORM

Manage Licenses

SHOW/WIDE FIELDS: 8/71 Fields shown - All licenses shown | FILTER: 0 filters applied | OPEN TEMPLATE | SAVE TEMPLATE | SAVE AS PDF | DOWNLOAD AS CSV FOR EXCEL

WITHDRAW SELECTED LICENSES: 0 licenses selected | ALLOCATE SELECTED LICENSES: 0 licenses selected | GO TO LICENSE ALLOCATION

ID	COURSE/TEAM	TYPE	GROUP	SITE	TEACHER	EXP. DATE	STATUS	
01	1007	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	2
02	1008	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
03	1009	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
04	1010	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
05	1011	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
06	1012	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
07	1013	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
08	1014	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
09	1015	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
10	1016	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
11	9407	Customer Service & Sales	Online Course	N/A	N/A	07/31/24	Unassigned	
12	9408	Customer Service & Sales	Exam	N/A	N/A	07/31/24	Unassigned	
13	9409	Customer Service & Sales	Online Course	N/A	N/A	07/31/24	Unassigned	
14	9410	Customer Service & Sales	Exam	N/A	N/A	07/31/24	Unassigned	

RISE UP PLATFORM

Manage Licenses

SHOW/WIDE FIELDS: 8/71 Fields shown - All licenses shown | FILTER: 0 filters applied | OPEN TEMPLATE | SAVE TEMPLATE | SAVE AS PDF | DOWNLOAD AS CSV FOR EXCEL

WITHDRAW SELECTED LICENSES: 0 licenses selected | ALLOCATE SELECTED LICENSES: 0 licenses selected | GO TO LICENSE ALLOCATION

LICENSE DETAILS


ID: 17
 Course:
 Type:
 Purchase Date: 05/22/23
 Expiration Date: 05/31/24
 Funder: FUNDER 1
 Group:
 Site: N/A
 Teacher:

Transfer History

5/15/2023	User ID: withdraw license
5/22/2023	User ID: Purchase License


Status: UNASSIGNED
 Archived: no

ID	COURSE/TEAM	TYPE	GROUP	SITE	TEACHER	EXP. DATE	STATUS	
01	1007	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
02	1008	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
03	1009	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
04	1010	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
05	1011	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
06	1012	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
07	1013	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
08	1014	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
09	1015	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
10	1016	Customer Service & Sales	Exam	N/A	N/A	05/31/24	Unassigned	
11	9407	Customer Service & Sales	Online Course	N/A	N/A	07/31/24	Unassigned	
12	9408	Customer Service & Sales	Exam	N/A	N/A	07/31/24	Unassigned	
13	9409	Customer Service & Sales	Online Course	N/A	N/A	07/31/24	Unassigned	
14	9410	Customer Service & Sales	Exam	N/A	N/A	07/31/24	Unassigned	

- Click  in the top right-hand corner to close the dialog box and return to the Manage Licenses menu.

Editing Account Details and Viewing Order History

You can visit **My Account** to manage your account information, such as your billing and shipping addresses, payment methods, and view your order history.

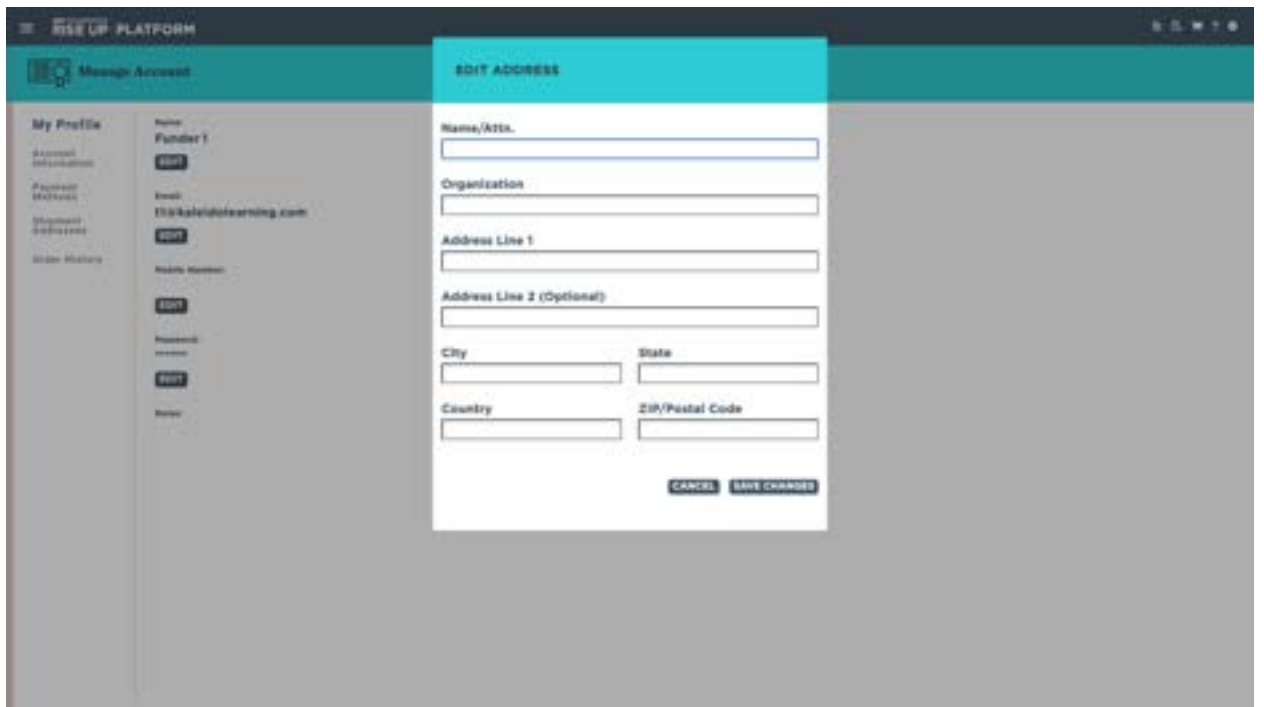
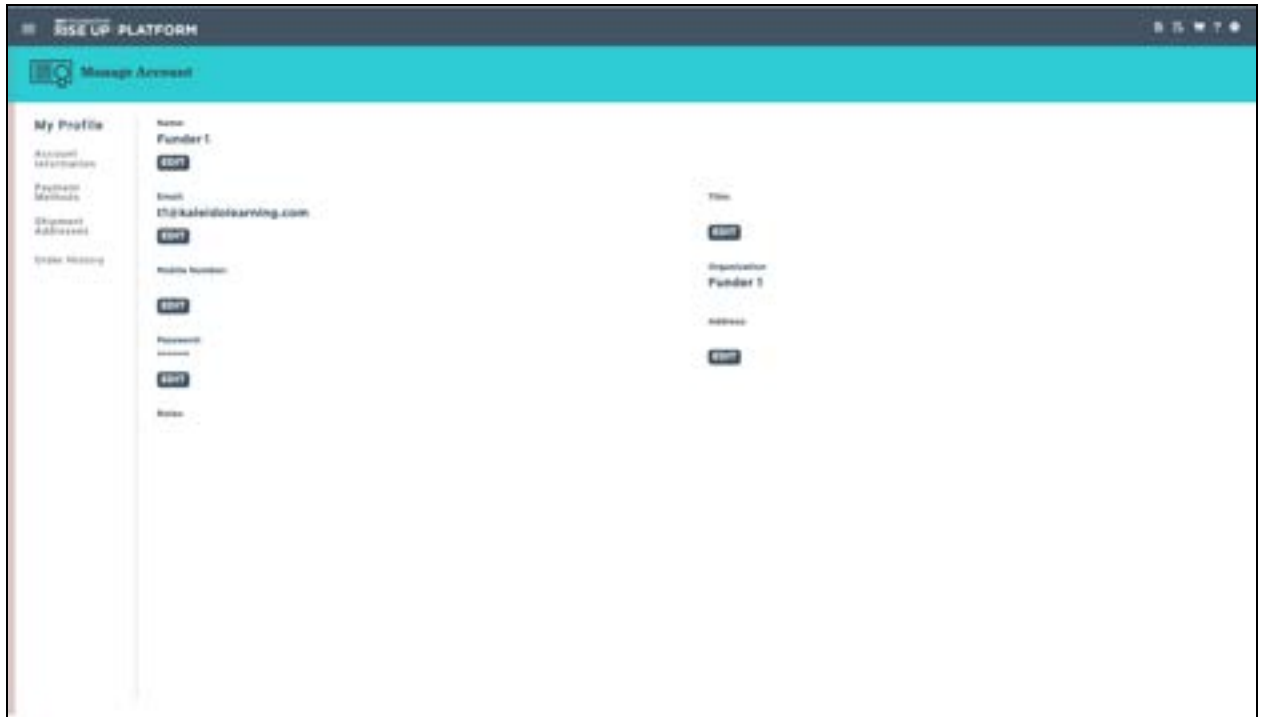
1. Click the **My Account** icon  in the upper-right corner of any page.



2. From the **My Account** page, you will be able to add or update information related to your Profile, Account Information, Payment Methods (Credit Cards and Purchase Orders), Shipment Addresses, and view your Order History.

Editing your Profile:

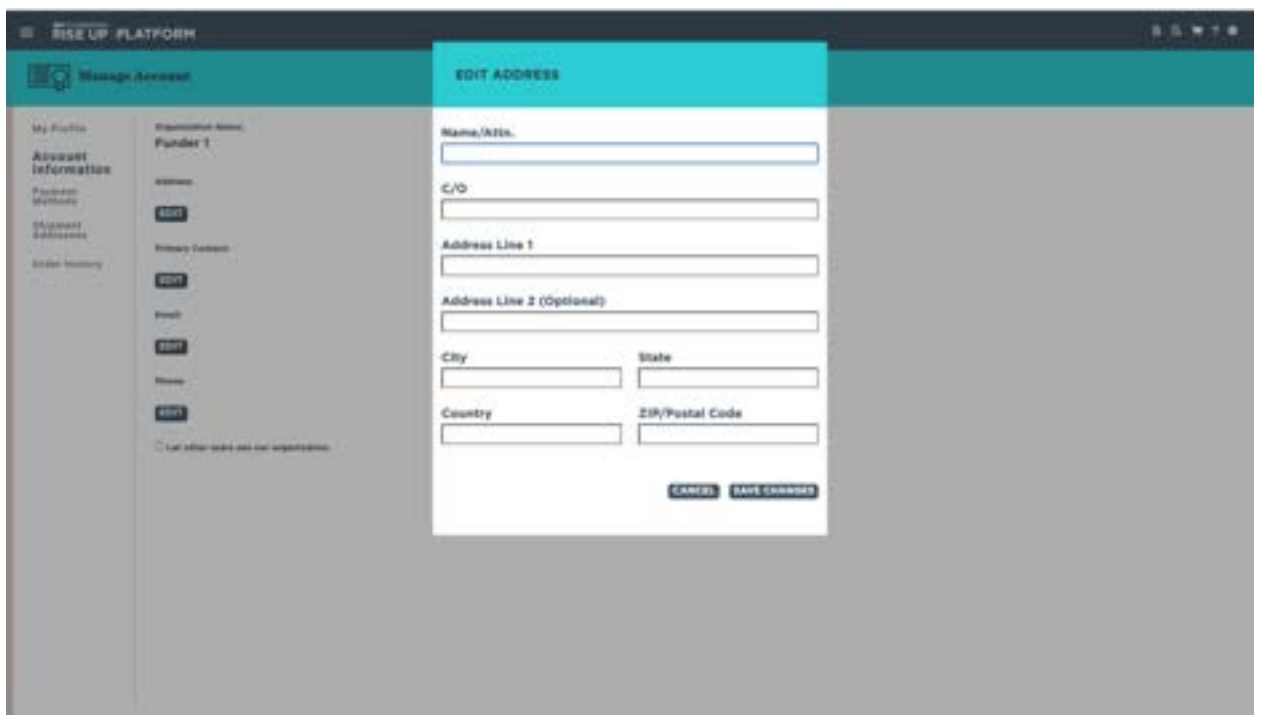
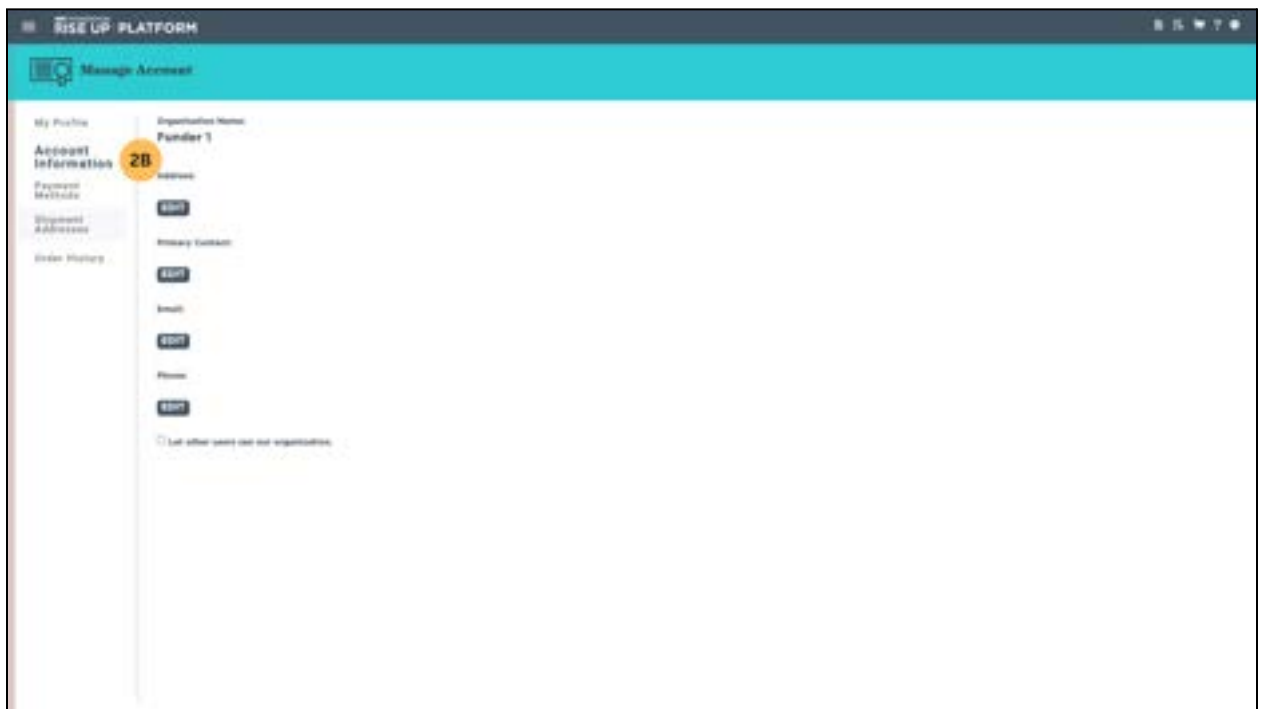
- a. Under **My Profile**, you can edit your profile information.
 - i. Click **EDIT** under the information you'd like to update.
 - ii. A dialog box with fields available to edit will appear. Enter the relevant details and click **SAVE CHANGES** to update your information.



Editing your Account Information:

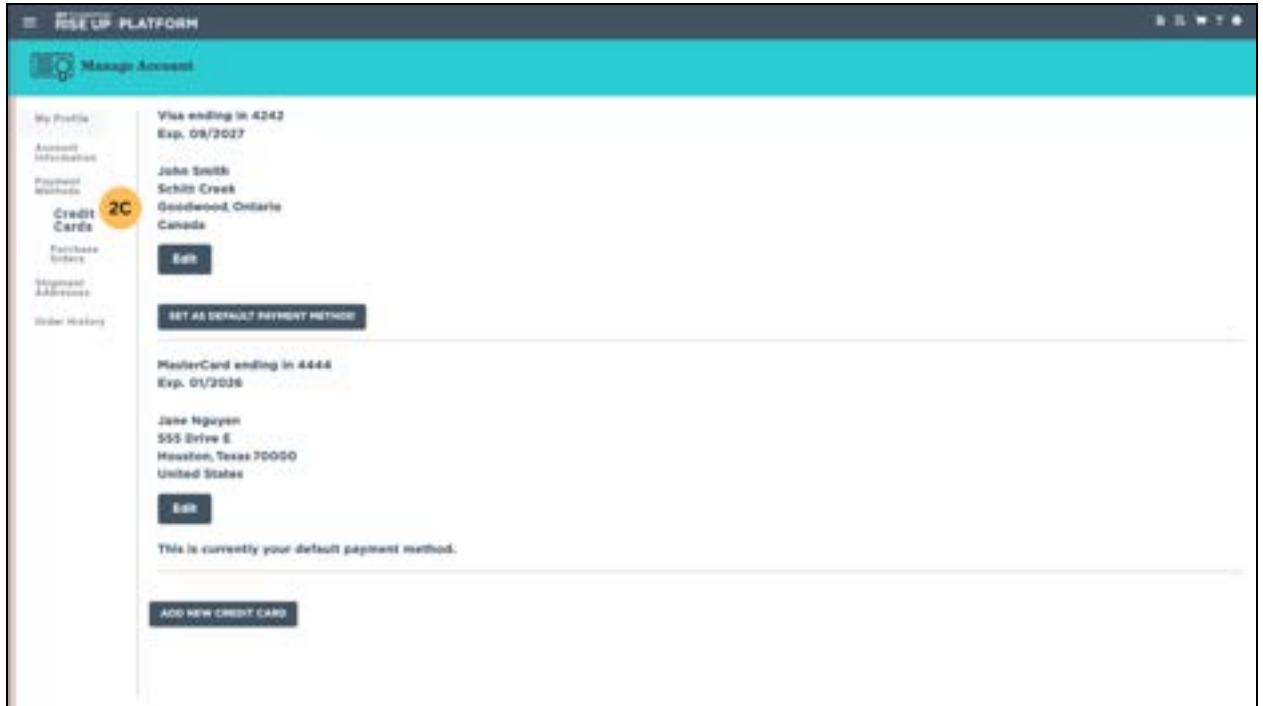
- b. Under **Account Information**, you can edit your account information.
 - i. Click **EDIT** under the information you'd like to update.
 - ii. A dialog box with fields available to edit will appear. Enter the relevant details and click **SAVE CHANGES** to update your information.

- iii. If you'd like to let other users see your organization check the box next to "Let other users see our organization." at the bottom.



Edit your Payment Methods:

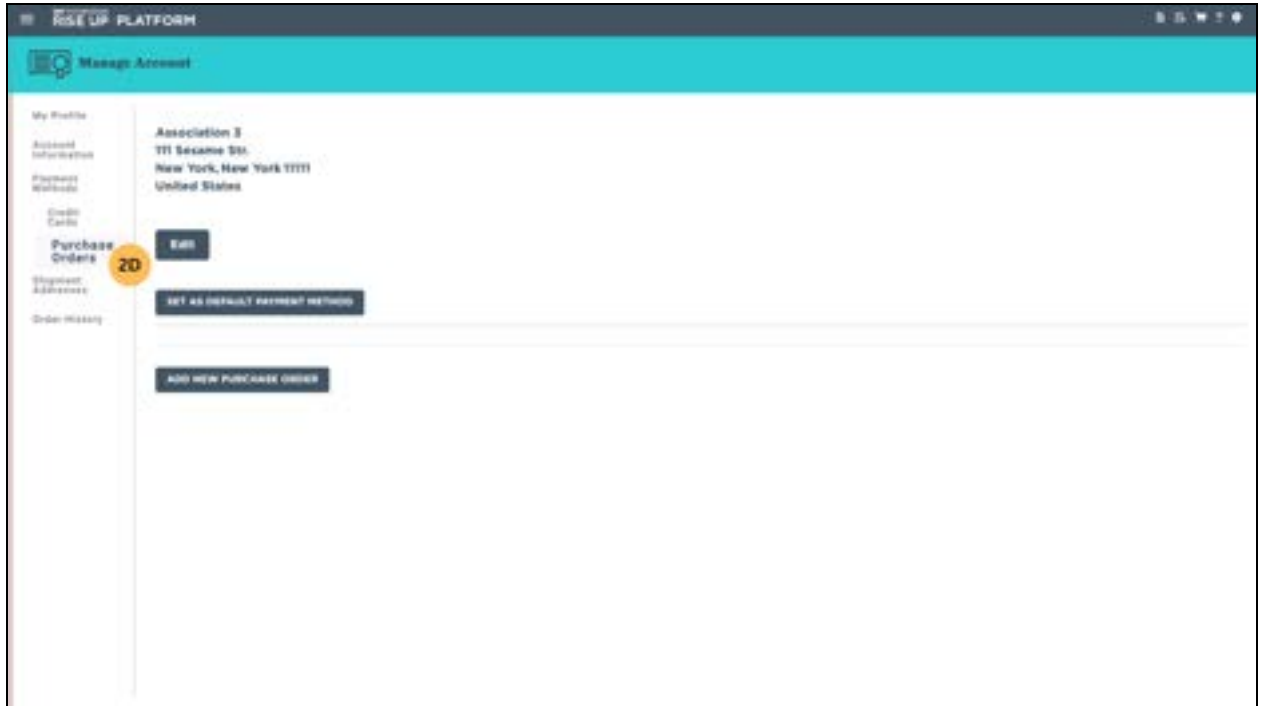
- c. Under **Payment Methods**, under **Credit Cards**, you can edit or add a new credit card.



- i. Click **EDIT** under the credit card you'd like to update.
- ii. A dialog box with fields available to edit will appear. Enter the relevant details and click **SAVE CHANGES** to update your information.
- iii. If you'd like to add a new credit card, click **ADD NEW CREDIT CARD** at the bottom of the page. A dialog box asking you for the details of your new credit card will appear. Enter the relevant details. If you'd like to set this card as your new default payment method, leave the box checked. If not, uncheck the box. Click **SAVE CARD** to save your card details.
- iv. If you'd like to change your default payment method, click **SET AS DEFAULT PAYMENT METHOD** under the desired credit card. A dialog box asking you to confirm your choice will appear. Click **YES** to confirm your new default payment method. Your selected default payment method should now say "This is currently your default payment method." underneath.

Editing your PO billing addresses:

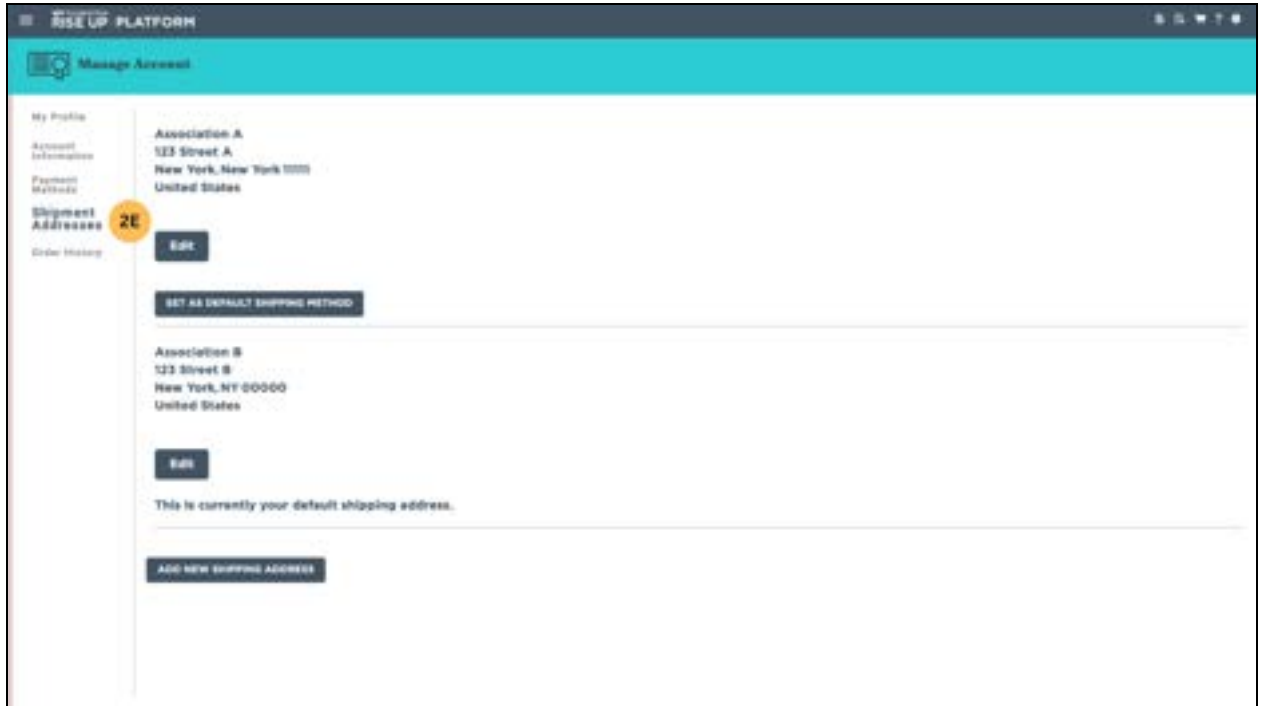
- d. Under **Payment Methods**, under **Purchase Orders**, you can edit or add purchase order billing addresses.



- i. Click **EDIT** under the purchase order address you'd like to update.
- ii. A dialog box with fields available to edit will appear. Enter the relevant details and click **SAVE CHANGES** to update your information.
- iii. If you'd like to add a new purchase order address, click **ADD NEW PURCHASE ORDER** at the bottom of the page. A dialog box asking you for the details of your new purchase order address will appear. Enter the relevant details. Click **SAVE CHANGES** to save your purchase order address details.
- iv. If you'd like to change your default payment method, click **SET AS DEFAULT PAYMENT METHOD** under the desired purchase order address. A dialog box asking you to confirm your choice will appear. Click **YES** to confirm your new default payment method. Your selected default payment method should now say "This is currently your default payment method." underneath.

Editing your Shipping Addresses:

- e. Under **Shipping Addresses**, you can edit or add shipping addresses.



- i. Click **EDIT** under the shipping address you'd like to update.
- ii. A dialog box with fields available to edit will appear. Enter the relevant details and click **SAVE CHANGES** to update your information.
- iii. If you'd like to add a new shipping address, click **ADD NEW SHIPPING ADDRESS** at the bottom of the page. A dialog box asking you for the details of your new shipping address will appear. Enter the relevant details. Click **SAVE CHANGES** to save your shipping address details.
- iv. If you'd like to change your default shipping address, click **SET AS DEFAULT SHIPPING ADDRESS** under the desired shipping address. A dialog box asking you to confirm your choice will appear. Click **YES** to confirm your new shipping. Your selected default shipping address should now say "This is currently your default shipping address." underneath.

Viewing your Order History:

- f. Under **Order History**, you can see the details of your previously placed orders.