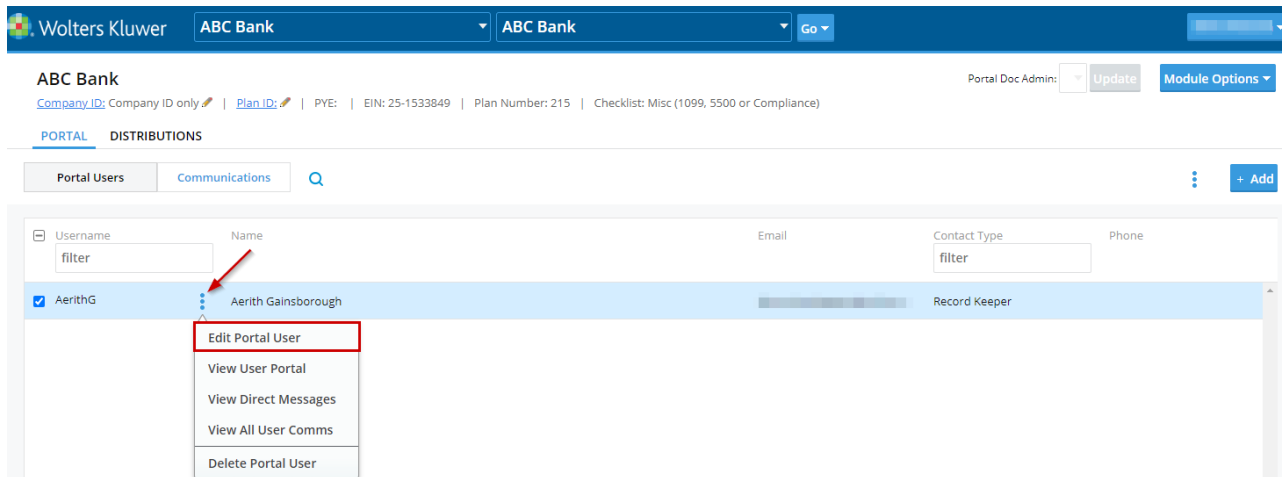


How to Alter a Portal User's Username

07/30/2024 12:46 pm CDT

Standard Users with permissions to 'Edit' the Portal module may change portal usernames from the "Edit Portal User" screen.

From within the Portal module, on the Portal Users Tab, select the menu icon (tricolon) next to the portal user that needs to be updated and select 'Edit Portal User':



Select the 'User Info' tab and enter the new username. Be sure to select the 'Save Tab' button to ensure the changes are retained.

Edit Portal User
✕

Select User: **Aerith Gainsborough (AerithG)** View Add Add Existing Delete

> **User Info**

> Messaging

Tabs for Plan:

ABC Bank

Add
Delete

> Document

> 5500

[Edit Contact Types](#)

User Info

User Information

Portal Username: **AerithG**

Name: **Aerith Gainsborough** [Split name](#)

Prefix:

First: **Aerith**

Middle:

Last: **Gainsborough**

Suffix:

Title/Position:

Company Name: **Flower Merchant Avalanche**

Password:** Reset Password

Main Contact Type: **Record Keeper** [Edit](#)

Add Contact Types: None

Select Contact Types

**Note: When the Reset Password button displays, the portal user has logged into the portal to set up security questions and a password. You do not need to click the button unless your client needs assistance resetting their password.

Contact Information

Save Tab

Help
Close

NOTE: The portal user will have to use the new username to log into portal and any references to that user will adopt the new given username.