

How to Alter a Portal User's Username

03/26/2025 12:09 pm CDT

A **User** with permission to **Edit** the Portal module can update a portal username from the **Edit Portal User** screen.

- **Navigate to the Portal Users Tab** in the Portal module.
- Click the **menu icon** (three dots) next to the user whose username needs updating.

The screenshot displays the 'ABC Bank' portal interface. At the top, there's a header with 'Wolters Kluwer' and 'ABC Bank' selected in dropdown menus, followed by a 'Go' button. Below this, the 'ABC Bank' section includes a 'Portal Doc Admin' dropdown, an 'Update' button, and a 'Module Options' dropdown. The main content area is titled 'PORTAL DISTRIBUTIONS' and contains two tabs: 'Portal Users' (active) and 'Communications'. A search bar is present. The 'Portal Users' table lists users with columns for Username, Name, Email, Contact Type, and Phone. The first user, 'AerithG', is selected. A dropdown menu is open next to the user's name, showing options: 'Edit Portal User' (highlighted with a red box and a red arrow), 'View User Portal', 'View Direct Messages', 'View All User Comms', and 'Delete Portal User'.

- Select **Edit Portal User**.
- In the **User Info** tab, enter the new username.
- Click the **Save** button to confirm the changes.

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

User Info

User Information

Portal Username: AerithG

Name: Aerith Gainsborough

Prefix:

First: Aerith

Middle:

Last: Gainsborough

Suffix:

[Split name](#)

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 need to log in with the new username. Any references to that user will update to the new username as well.