

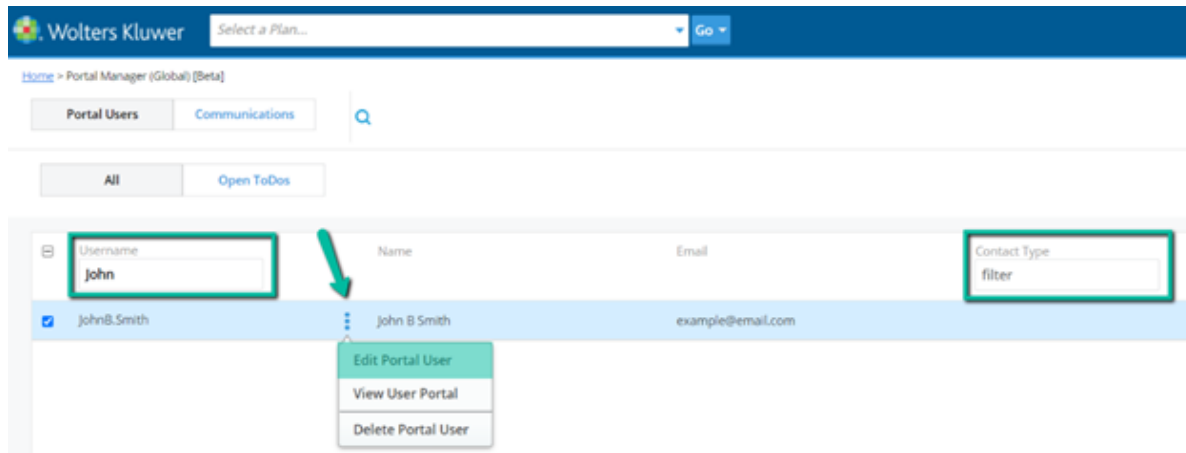
Delete Portal User

05/13/2026 11:22 am CDT

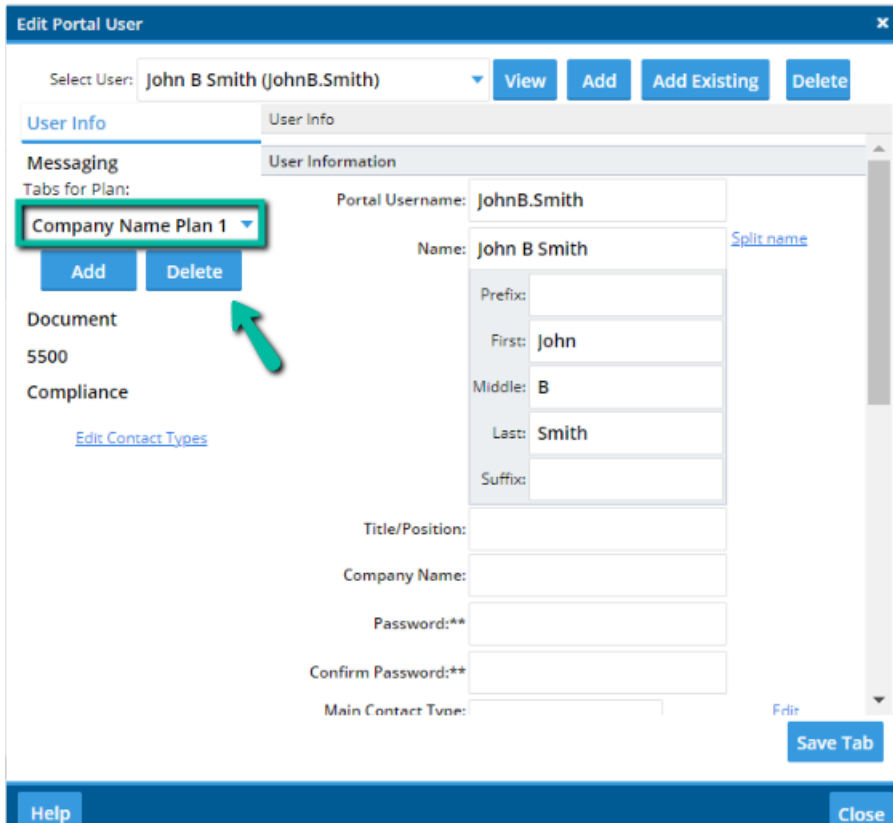
To remove a Portal User from the system, you must first remove them from the plan(s) in which they are associated.

The user may be edited from either a particular plan via the Global Dashboard. Select the tricolon next to their name and click on Edit Portal User will bring up the 'Delete Portal User' option.

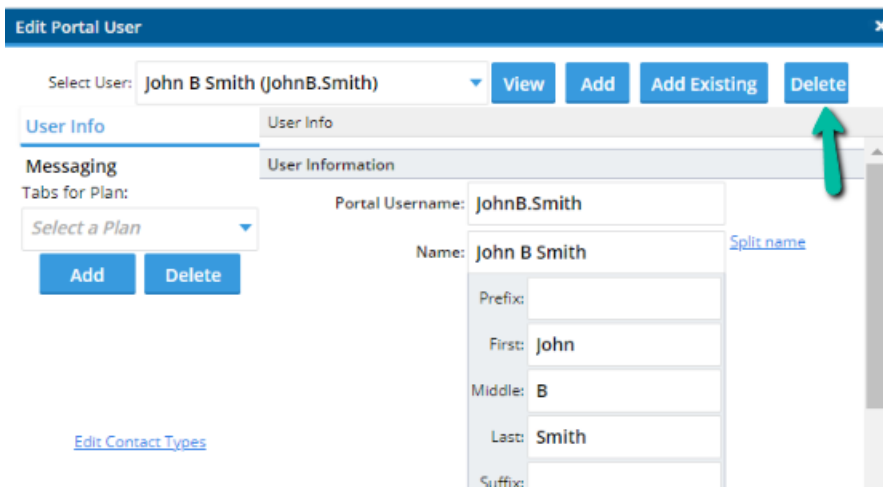
You can scroll and find the user or filter by Username or Contact Type:



Once in the 'Edit Portal User' screen, you will need to select each plan you wish to remove them from on the left-hand side under tabs for plans. If you wish to remove them from a single plan you can select that plan and delete. If you wish to remove them from the software completely, you will need to select each plan in the drop-down menu shown below and select 'Delete':



Once removed from all associated plans the software will allow you to select the 'Delete' option in the upper right-hand corner:



A window will populate confirming you wish to remove them from the system:

www.ftwilliam.com says

Do you wish to completely delete this portal user from the system?



****If the user is not currently associated with a plan, you are able to select the user from the Global Dashboard, select the tricolon to the right of their name, and 'Delete Portal User':**

The screenshot shows the Wolters Kluwer Portal Manager interface. At the top, there is a blue header with the Wolters Kluwer logo and a search bar containing "Select a Plan..." and a "Go" button. Below the header, the breadcrumb "Home > Portal Manager (Global) [Beta]" is visible. The main content area has two tabs: "Portal Users" (selected) and "Communications". A search icon is located to the right of the tabs. Below the tabs, there are two buttons: "All" and "Open ToDos". The main content area displays a table with columns for Username, Name, and Email. The first row is highlighted in blue and contains the following data: Username: JohnB.Smith, Name: John B Smith, Email: example@email.com. A dropdown menu is open next to the Name column, showing three options: "Edit Portal User", "View User Portal", and "Delete Portal User".

| Username | Name | Email |
|---|--------------|-------------------|
| <input type="text" value="John"/> | | |
| <input checked="" type="checkbox"/> JohnB.Smith | John B Smith | example@email.com |

- Edit Portal User
- View User Portal
- Delete Portal User