


Edit A User

Last Modified on 01/29/2021 2:50 pm PST

Go to **Administration** and then select *Manage Users*.

An administrator can edit a user and manage the reports and features accessed by that user. To view a specific user's detailed information, either click on the user login from the displayed table or select  and search for a user by their first name, last name, user login, or email address.

Note: User administrators cannot modify their user access. Another user administrator will need to modify your access if necessary. If there is only one user administrator, an additional user administrator will need to be added.

To edit user details:

1. When you find the user to edit, click the highlighted line on the page.
2. View the **User Detail** section, where you may modify the user's *first name, last name, email address, status, or phone number*. View the user status description on the [user status options](#).
3. Edit the selected field for the user.
4. Click the **Save Changes** button located at the top right.
5. To exit and return to the list of users for your account, select **Close**, located at the top right of the page or you can press the escape key on your keyboard.

To edit what appears on the user's **Dashboard**:

1. Click the **Access** button under **Actions**
2. View the **Dashboards** section, where you can toggle the options on, to enable access for the user, or off. Please see the list of available dashboard items detailed in the [user access options](#).
3. To enable, click the toggle and it will display in *green*. To disable, click the toggle and it will display in *white*.
4. Each time the toggle is switched off or on, the configuration is automatically applied and saved.

To edit access to disputes:

1. Click the **Access** button under **Actions**
2. View the **Dispute History Report** section, where you can toggle the options on, to enable access for the user, or off. Please see the list of available reports detailed in the [user access options](#).
3. To enable, click the toggle and it will display in *green*. To disable, click the toggle and it will display in *white*.
4. Each time the toggle is switched off or on, the configuration is automatically applied and saved.

To edit access to reports:

1. Click the **Access** button under **Actions**
2. View the **Other Reports** section, where you can toggle the options on, to enable access for the user, or off. Please see the list of available reports detailed in the [user access options](#).
3. To enable, click the toggle and it will display in *green*. To disable, click the toggle and it will display in *white*.

4. Each time the toggle is switched off or on, the configuration is automatically applied and saved.

To edit access to administration options:


1. Click the **Access** button under **Actions**
2. View the **Administration** section, where you can toggle the options on, to enable access for the user, or off. Please see the list of available features detailed in the [user access options](#).
3. To enable, click the toggle and it will display in *green*. To disable, click the toggle and it will display in *white*.
4. Each time the toggle is switched off or on, the configuration is automatically applied and saved.

To edit access to products (only applicable to accounts using a Qualpay product):

1. Click the **Access** button under **Actions**
2. View the product section that applies to your account, where you can toggle the options on, to enable access for the user, or off. Please see the list of available products detailed in the [user access options](#).
3. To enable, click the toggle and it will display in *green*. To disable, click the toggle and it will display in *white*.
4. Each time the toggle is switched off or on, the configuration is automatically applied and saved.

*To exit and return to the list of users for your account, select **Done**, located at the bottom right of the pop-up window, or you can press the escape key on your keyboard.*

To send a password reset email to a user:

1. Click the **Profile** button under **Actions**.
2. Click **Security** in the left-hand menu.
3. In the **Password** section of the page, click  **RESET** .
4. Click **Send** in the pop-up window to confirm sending the password reset email to the user.

*To exit to the dashboard, select **Dashboard** in the left-hand menu. To exit and return to the User Admin report, click the back button in your browser.*