How to Update a User's Information

In this video we will discuss how to edit a specific user's contact information.

If you've ever needed to update someone's information but you'd rather not import a spreadsheet you can make the changes quickly and efficiently. (It's important to note if your contact information is automatically integrated with our system some of the manual changes you make will be reverted back when your integration goes through).

First, let's find the specific user you'd like to edit. To search for your user hover over "users" and select "view users". Use the search box to locate your user, in this case by last name. Once you've found your user click on the "dashboard" icon located to the right of their name. This icon is indicated by a little man in a blue shirt with a green arrow.

You are now viewing this user's dashboard. To remove any unwanted contact information simply click the delete button to the right of the specific contact you'd like to remove. To simply edit the contact information, click on the edit button to the right, always remember to save your work. If you'd like to add contact information, choose the contact type in the grey bar under the current contact information and enter it in the blank provided. Click the "add" button to the right to add the new contact information.

Thanks for watching! If you have more questions please feel free to contact our Customer Success Team at support@highgroundsolutions.com.

