Edit an Existing Dashboard User - Admin Panel

Purpose

Update a user’s organization, name, and role information.

Where to find this

Admin tab → **Dashboard Logins** → in the user row, click the **green pencil** icon.

Steps

1. Review the **Email** at the top to confirm you are editing the right user.
2. Update **User Type** if you need to change permissions.
3. Update **Select Organization** if the user has moved teams.
4. Update **Firstname**, **Middlename** if used, and **Lastname**.
5. Add or update **Mobile**. You can follow **+1-XXX-XXX-XXXX** as a guide.
6. Click **Submit** to save changes.

Result

The user record updates in the Dashboard User List.

Tips and Good practices

- Keep names consistent with HR or directory records.
- Review access after role changes and remove unused high-privilege roles.
- When moving a user between organizations, verify call routing and on-call assignments.

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