

16.3.1 How to replace one user with another

In a company, it can happen that a colleague decides to change jobs and therefore no longer be part of the team. What to do in these cases from the CRM perspective?

There are two possibilities:

- **Deactivate** the "old user" and create a new one. This way, all entities will remain assigned to the outgoing user.
- Choose to **replace** the "old user" with a completely new one, and consequently reassign all the relevant entities that belonged to the outgoing user directly to the new one.

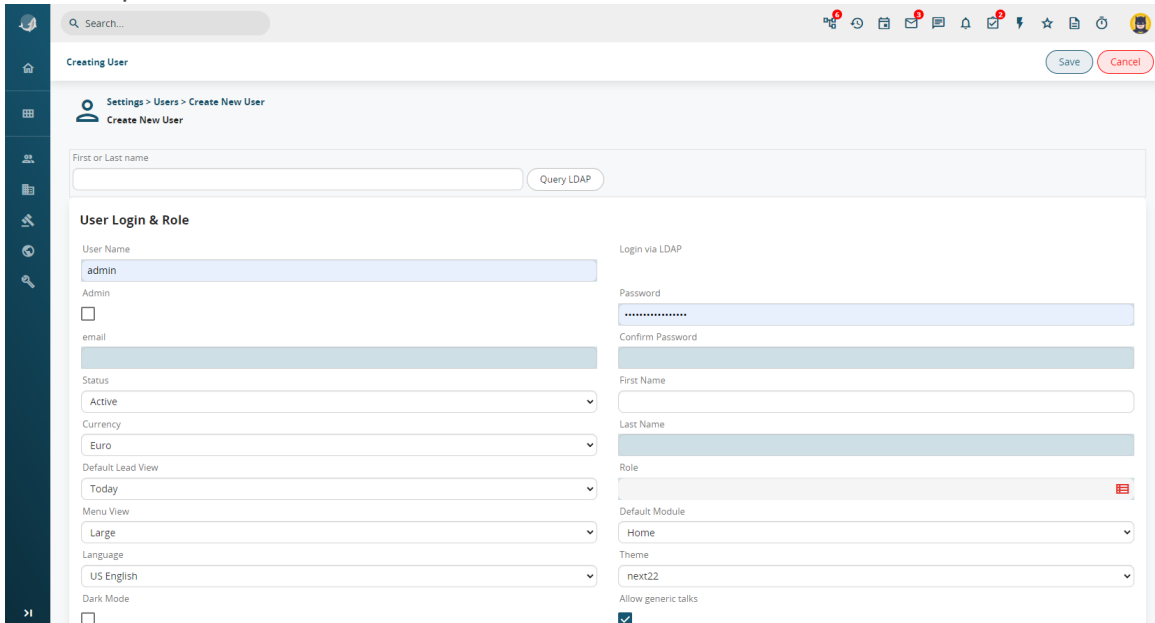
If we decide to replace the user, how should we proceed? It's very simple, just follow the steps described below:

1. Deactivate the old user by changing the STATUS field from Active to Non-active.

The screenshot shows the 'Editing User Canaglio Paolo' interface. The 'Status' dropdown menu is open, displaying three options: 'Inactive', 'Active', and 'Inactive'. A red arrow points to the first 'Inactive' option. The form includes the following fields and settings:

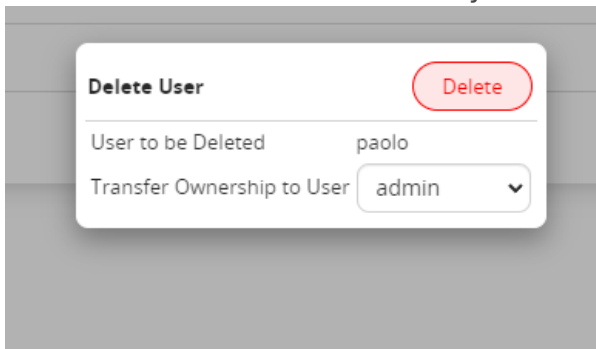
- User Name: paolo
- Admin: ☐
- email: admin@vte123abc987.com
- Status: Inactive (selected)
- Default Lead View: Today
- Menu View: Large
- Language: IT Italiano
- Dark Mode: ☐
- Enable public talks: ☒
- Timezone: [unselected]
- Login via LDAP: ☐
- 2-Factor Authentication: Not active
- First Name: Paolo
- Last Name: Canaglio
- Role: Agent
- Default Module: Home
- Theme: next22
- Allow generic talks: ☒
- Notify me via: VTE
- Notification Summary: [unselected]

2. Create a new user by clicking the CREATE button in SETTINGS > USERS and following the familiar procedure.



The screenshot shows the 'Creating User' form in a CRM system. The form is titled 'Creating User' and has a 'Save' button and a 'Cancel' button. The form is divided into two main sections: 'User Login & Role' and 'User Profile'. The 'User Login & Role' section includes fields for 'User Name' (set to 'admin'), 'Admin' (checkbox), 'email', 'Status' (set to 'Active'), 'Currency' (set to 'Euro'), 'Default Lead View' (set to 'Today'), 'Menu View' (set to 'Large'), 'Language' (set to 'US English'), 'Dark Mode' (checkbox), 'Login via LDAP' (checkbox), 'Password', 'Confirm Password', 'First Name', 'Last Name', 'Role' (set to 'Home'), 'Default Module' (set to 'Home'), 'Theme' (set to 'next22'), and 'Allow generic talks' (checkbox). The 'User Profile' section includes a 'First or Last name' field and a 'Query LDAP' button.

3. Click on the DELETE button next to the name of the "old user." A dialogue window will appear asking us to make a choice: to which user do you want all the items previously assigned to the "old user" to be reassigned? In this case, using the dropdown menu, we will choose the name of the newly created user.



The screenshot shows a 'Delete User' dialog box. The dialog box has a title bar with the text 'Delete User' and a 'Delete' button. The main content area contains two fields: 'User to be Deleted' with the value 'paolo' and 'Transfer Ownership to User' with a dropdown menu showing 'admin'.

4. The user replacement process ends here; the CRM will take only a few seconds to reassign all the items to the new user.

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