

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:

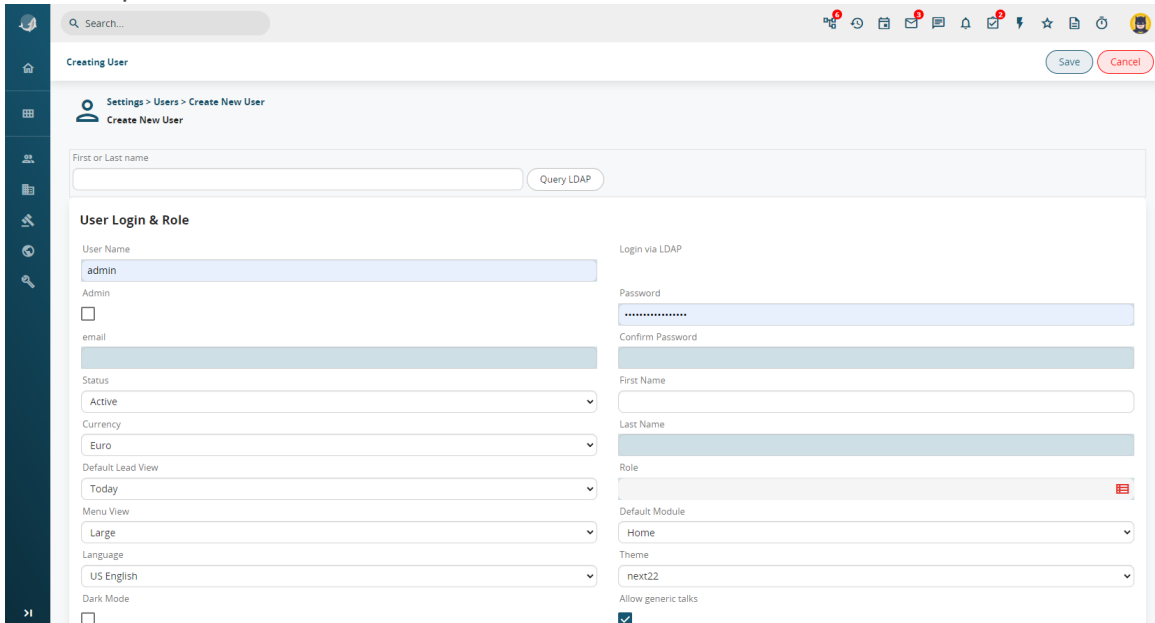
- **Deactivate** the "old user" and create a new one. This way, all entities will remain assigned to the outgoing user.
- Choose to **replace** the "old user" with a completely new one, and consequently reassign all the relevant entities that belonged to the outgoing user directly to the new one.

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.

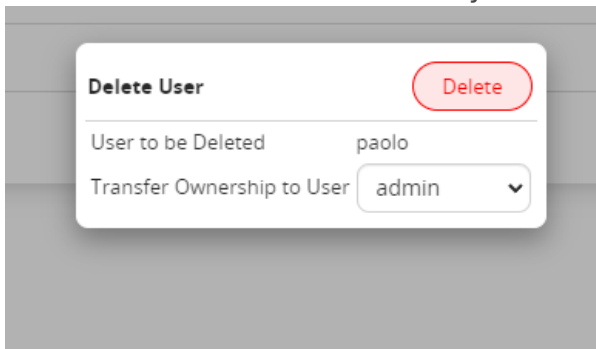
The screenshot shows the 'Editing User Canaglio Paolo' interface in a CRM system. The 'User Login & Role' section is visible, with fields for User Name, Admin, email, Status, Default Lead View, Menu View, Language, Dark Mode, and Enable public talks. The 'Status' dropdown menu is open, showing 'Inactive', 'Active', and 'Inactive' options. A red box highlights the 'Inactive' option. A red arrow points to the 'First Name' field, which contains 'Paolo'. The 'Last Name' field contains 'Canaglio'. The 'Role' is set to 'Agent'. The 'Default Module' is 'Home'. The 'Theme' is 'next22'. The 'Allow generic talks' checkbox is checked. The 'Notify me via' dropdown is set to 'VTE'. The 'Notification Summary' link is visible at the bottom right. The interface includes a search bar at the top, a sidebar with navigation icons, and a Windows taskbar at the bottom.

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. It has a 'Delete' button and a 'Cancel' button. The dialog box contains two fields: 'User to be Deleted' (set to 'paolo') and 'Transfer Ownership to User' (set to 'admin' with a dropdown arrow).

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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