

16.3.1 How to replace one user with another

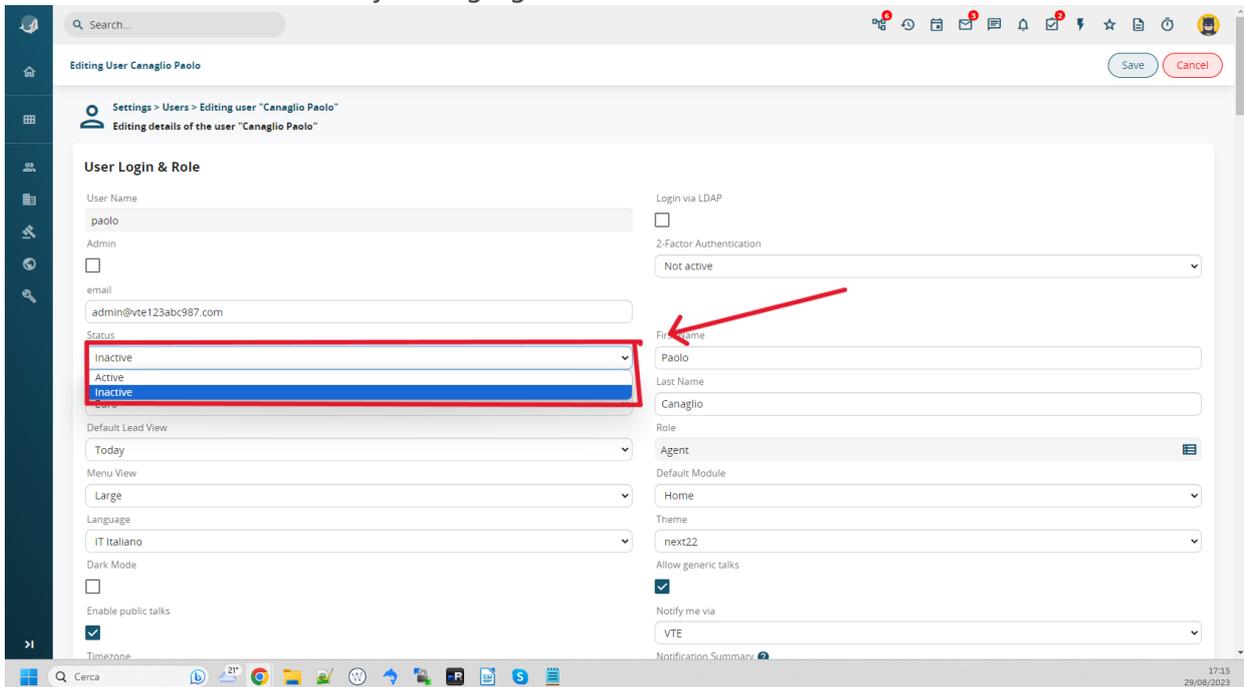
In a company, it can happen that a colleague decides to change jobs and therefore no longer be part of the team. What to do in these cases from the CRM perspective?

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.



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

The screenshot shows a web interface for creating a new user. The page title is "Creating User" and the breadcrumb is "Settings > Users > Create New User". The form is divided into two columns. The left column contains fields for "First or Last name", "User Name" (with a "Query LDAP" button), "Admin" (checkbox), "email", "Status" (dropdown menu set to "Active"), "Currency" (dropdown menu set to "Euro"), "Default Lead View" (dropdown menu set to "Today"), "Menu View" (dropdown menu set to "Large"), "Language" (dropdown menu set to "US English"), and "Dark Mode" (checkbox). The right column contains fields for "Login via LDAP", "Password", "Confirm Password", "First Name", "Last Name", "Role", "Default Module" (dropdown menu set to "Home"), "Theme" (dropdown menu set to "next22"), and "Allow generic talks" (checkbox). At the top right, there are "Save" and "Cancel" buttons.

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 has a title "Delete User" and a "Delete" button. It 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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