

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 Bella Antonella' form. The 'Status' dropdown menu is open, showing 'Inactive' selected. The form includes fields for Email (antonella.bella@email.it), Admin (checkbox), Status (Inactive), Default Lead View (Today), Default Module (Home), Language (US English), Dark Mode (checkbox), Enable public talks (checkbox), Timezone, Use Single Sign-On (No), 2-Factor Authentication (Not active), First Name (Antonella), Last Name (Bella), Role (Agent), Theme (next122), Allow generic talks (checkbox), Notify me via (VTE), and Notification Summary.

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

Creating User

Settings > Users > Create New User
Create New User

User Login & Role

Email (User name) vtenext2604@gmail.com

Admin ☐

Confirm Password

Status

Currency

Default Lead View

Default Module

Language

Dark Mode ☐

Enable public talks

Use Single Sign-On

Password

First Name

Last Name

Role

Theme

Allow generic talks ☒

Notify me via

Save

- 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.

Delete User

Delete

User to be Deleted antonella.bella@email.it

Transfer Ownership to User giuseppe.verdi@email.it

- 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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