

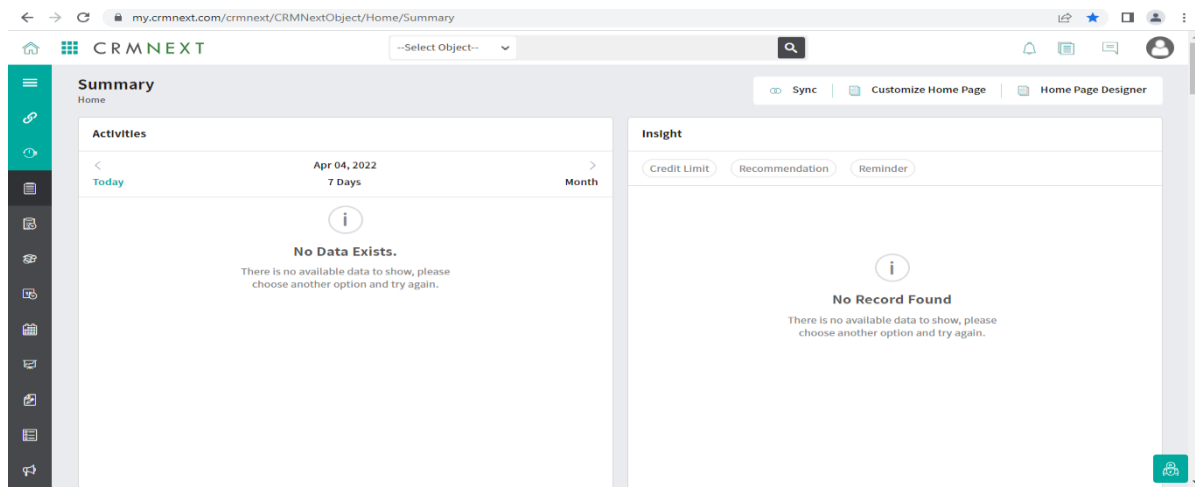
# User Deactivate

**Subject:** We will deactivate the User.

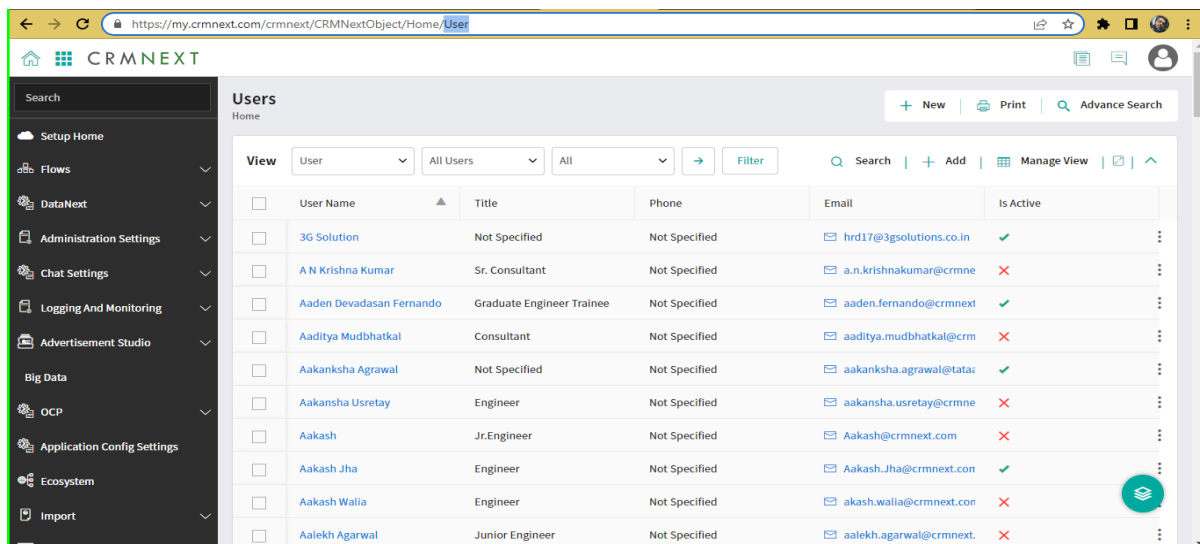
**Solution:**

**Step to deactivate User.**

**Step 1:** Login to the My portal.



**Step 2:** Go to “user” object.



**Step 3:** Click on “filter” button & search the user in the username field.

Filters

×

Employee Code

Operator

▼

User Name

Like

▼

Ishu

Email

Operator

▼

Mobile

Operator

▼

Login Id

Operator

▼

Employee No

Operator

▼

Apply

Clear

**Step 4:** Click on the apply button.

Filters

×

Employee Code

Operator

▼

User Name

Like

▼

Ishu

Email

Operator

▼

Mobile

Operator

▼

Login Id

Operator

▼

Employee No

Operator

▼

Apply

Clear

**Step 5:** Select the user which you want to deactivate.

**Users**  
Home

+ New | Print | Advance Search

View: User | All Users | All | Filter

<input type="checkbox"/>	User Name	Title	Phone	Email	Is Active
<input type="checkbox"/>	Ambar Bishun	Graduate Engineer Trainee	Not Specified	ambar.bishun@crmnex.com	✓
<input type="checkbox"/>	Ishu Ahlawat	Intern	Not Specified	Ishu.Ahlawat@crmnex.com	✓
<input type="checkbox"/>	Ishu Testcase	Intern	Not Specified	IshuTestcase@crmnex.com	✓
<input type="checkbox"/>	Rishu Sinha	Consultant	Not Specified	rishu.sinha@crmnex.com	✗

Showing 1-4 Of 4

User Delete Log | Mass Update | Mass Update | Travel Import | Exit Import | Import Promotion Data

**Step 6:** When the user opens it, then go to the edit section.

**Employee**  
Home > Detail

Geography Mapping | Geography Mapping | Manage Team

Id	Name	Mobile	Sub Group	Grade
00003986	Ishu Testcase	+91 9667893701	Biztech	E1

**BASIC** | TRAVEL DESK | EXIT | HEALTH INSURANCE | TAG | OTHERS | HISTORY | SALES/KAM SPECIFIC DETAILS

**Key Information**

<b>Id</b> 00003986	<b>Name</b> Ishu Testcase
<b>Short Name</b> IshuTestcase	<b>Active</b> ✓
<b>Login ID</b> IshuTestcase@crmnex.com	<b>Email Client User</b> ✗
<b>Email ID</b> IshuTestcase@crmnex.com	<b>Disable Login Access</b> ✗
<b>Mobile</b> +91 9667893701	<b>Mobile User</b> ✗
<b>Title</b> Intern	<b>Employee Code</b> IC9999
<b>Group</b> Global Operations	<b>Category_prj</b> Not Specified
<b>Band</b> 1	<b>Sub Group</b> Biztech
<b>Location</b> Noida	<b>Grade</b> E1
<b>Reports To</b> Ishu Ahlawat	<b>Default Territory</b> SAARC
<b>Employee Experience (At the time of joining)</b> 0.0	<b>Is Offline User</b> ✗
<b>Employee date of joining</b> 14-02-2022	


Name	Code	Description
Consultant		

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9

Showing 1-1 Records

User Scope

Scope



Company

Not Specified

Created By Ishu Ahlawat on 18-05-2022 5:36 PM. Last Modified By Yatharth Tyagi on 07-12-2022 2:32 PM.


Edit




Delete

Clone

Close

**Step 7:** Then uncheck the activation field, it will deactivate the user & click on the save button.



### Employee

[Home](#) > [Detail](#) > [Edit](#)

BASIC USER SCOPE ACCESS PERMISSION TRAVEL DESK EXIT HEALTH INSURANCE TAG OTHERS SALES/KAM SPECIFIC DETAILS

User Type Employee

Name Ishu Middle Name Testcase

Short Name IshuTestcase Active ☒

LoginID IshuTestcase@crmnex.com Disable Login Access ☐

Email ID IshuTestcase@crmnex.com Email Client User ☐

Mobile 9667893701 Mobile User ☐

Title Intern Employee Code IC9999

Group Global Operations Sub Group Biztech

Default Territory SA

Save Cancel

Employee

Home > Detail > Edit

BASIC

USER SCOPE

ACCESS PERMISSION

TRAVEL DESK

EXIT

HEALTH INSURANCE

TAG

OTHERS

SALES/KAM SPECIFIC DETAILS

User Type

Employee

Name

Ishu

Middle Name

Testcase

Short Name

IshuTestcase

Active

☐

LoginID

IshuTestcase@crmnex.com

Disable Login Access

☐

Email ID

IshuTestcase@crmnex.com

Email Client User

☐

Mobile

9667893701

Mobile User

☐

Title

Intern

Employee Code

IC9999

Group

Global Operations

Sub Group

Biztech

Default Territory

SA

Save

Cancel

**Step 8:** Now user have been deactivated.

on

Employee

Home > Detail

Geography Mapping

Geography Mapping

Manage Team

Id	00003986	Name	Ishu Testcase	Mobile	+91 9667893701	Sub Group	Biztech	Grade	E1
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BASIC

TRAVEL DESK

EXIT

HEALTH INSURANCE

TAG

OTHERS

HISTORY

SALES/KAM SPECIFIC DETAILS

Key Information

Id

00003986

Name

Ishu Testcase

Short Name

IshuTestcase

Active

☒

Login ID

IshuTestcase@crmnex.com

Email Client User

☒

Email ID

IshuTestcase@crmnex.com

Disable Login Access

☒

Mobile

+91 9667893701

Mobile User

☒

Title

Intern

Employee Code

IC9999

Category\_prj

Not Specified

Group

Global Operations

Sub Group

Biztech

Band

1

Grade

E1

Location

Noida

Default Territory

SAARC

Reports To

Ishu Ahlawat

Is Offline User

☒

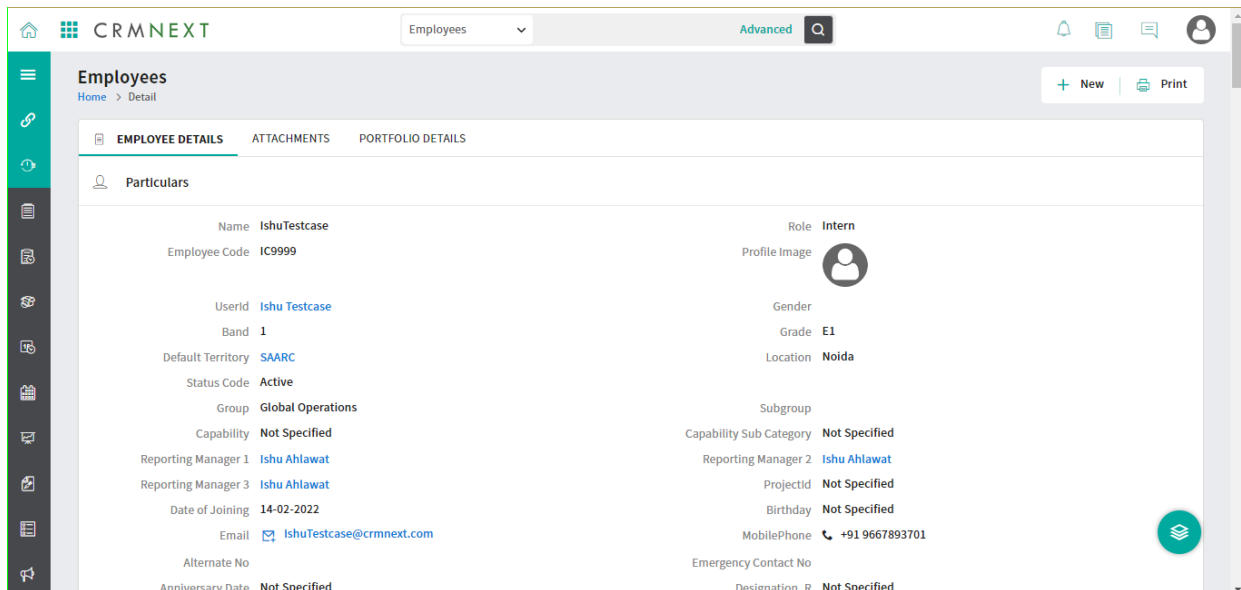
Employee Experience (At the time of joining)

0.0

Employee date of joining

14-02-2022

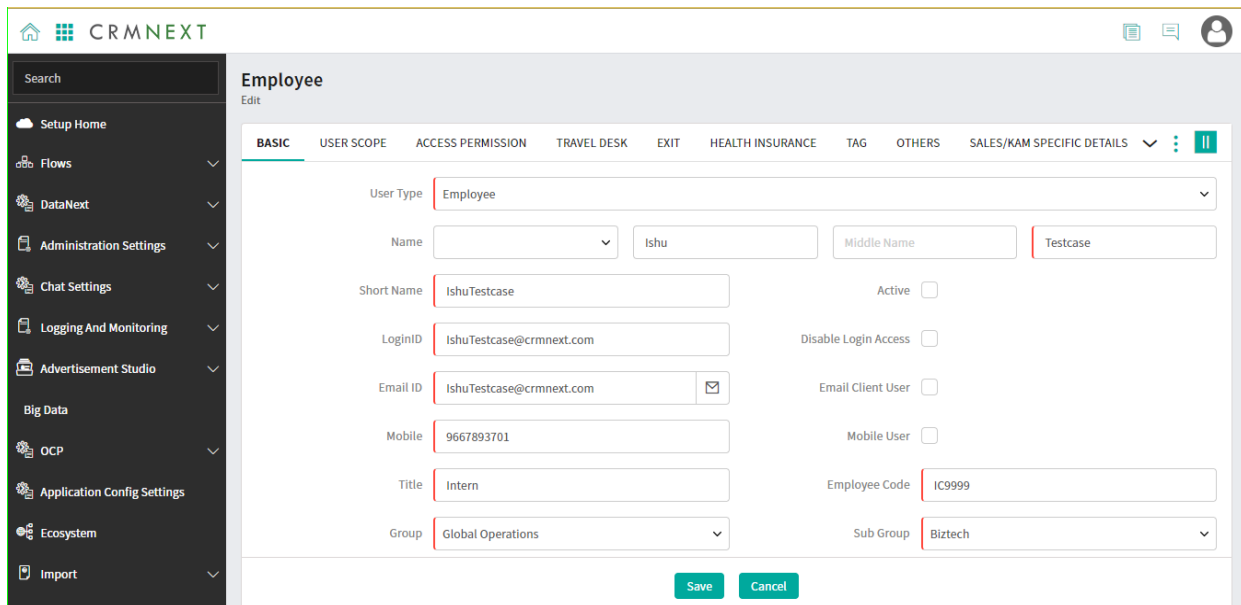
**Step 9:** As you see user have been deactivated but on employee object it will show as active.



The screenshot shows the 'Employees' page in CRMNEXT. The 'EMPLOYEE DETAILS' tab is selected, and the 'Particulars' section is visible. The employee's status is 'Active', which is the point of discrepancy mentioned in the text.

Particulars	Value
Name	IshuTestcase
Employee Code	IC9999
Role	Intern
Profile Image	[Profile Image]
Userid	Ishu Testcase
Band	1
Gender	
Grade	E1
Default Territory	SAARC
Location	Noida
Status Code	Active
Group	Global Operations
Subgroup	
Capability	Not Specified
Capability Sub Category	Not Specified
Reporting Manager 1	Ishu Ahlawat
Reporting Manager 2	Ishu Ahlawat
ProjectId	Not Specified
BirthDay	Not Specified
Date of Joining	14-02-2022
Email	IshuTestcase@crmnex.com
MobilePhone	+91 9667893701
Alternate No	
Emergency Contact No	
Designation_R	Not Specified
Anniversary Date	Not Specified

**Step 10:** Now we must edit save again because the user will also deactivate on employee object.



The screenshot shows the 'Employee Edit' page in CRMNEXT. The 'BASIC' tab is selected, and the 'User Type' is set to 'Employee'. The 'Active' checkbox is unchecked, indicating the user is deactivated. The 'Employee Code' is IC9999, and the 'Group' is Global Operations.

Field	Value
User Type	Employee
Name	Ishu
Middle Name	Testcase
Short Name	IshuTestcase
Active	<input type="checkbox"/>
LoginID	IshuTestcase@crmnex.com
Disable Login Access	<input type="checkbox"/>
Email ID	IshuTestcase@crmnex.com
Email Client User	<input type="checkbox"/>
Mobile	9667893701
Mobile User	<input type="checkbox"/>
Title	Intern
Employee Code	IC9999
Group	Global Operations
Sub Group	Biztech

**Step 11:** Now you will see on employee object that user will inactive that's why we are do two times edit & save.

CRMNEXT

Employees

Advanced

🔔 📄 💬 👤

Employees

Detail

+ New | 🖨 Print

EMPLOYEE DETAILS

ATTACHMENTS

PORTFOLIO DETAILS

Particulars

Name

IshuTestcase

Employee Code

IC9999

Userid

Ishu Testcase

Band

1

Default Territory

SAARC

Status Code

InActive

Group

Global Operations

Capability

Not Specified

Reporting Manager 1

Ishu Ahlawat

Reporting Manager 3

Ishu Ahlawat

Date of Joining

14-02-2022

Email

[IshuTestcase@crmnext.com](mailto:IshuTestcase@crmnext.com)

Alternate No

Anniversary Date

Not Specified

Role

Intern

Profile Image

Gender

Grade

E1

Location

Noida

Subgroup

Capability Sub Category

Not Specified

Reporting Manager 2

Ishu Ahlawat

Projectid

Not Specified

Birthday

Not Specified

MobilePhone

+91 9667893701

Emergency Contact No

Designation\_R

Not Specified