

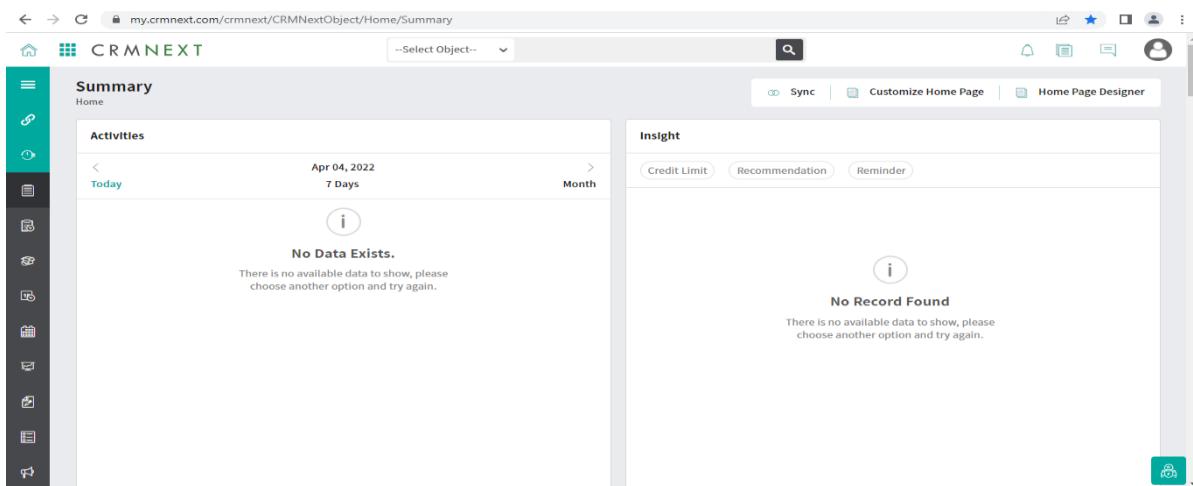
# User Deactivate

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

**Solution:**

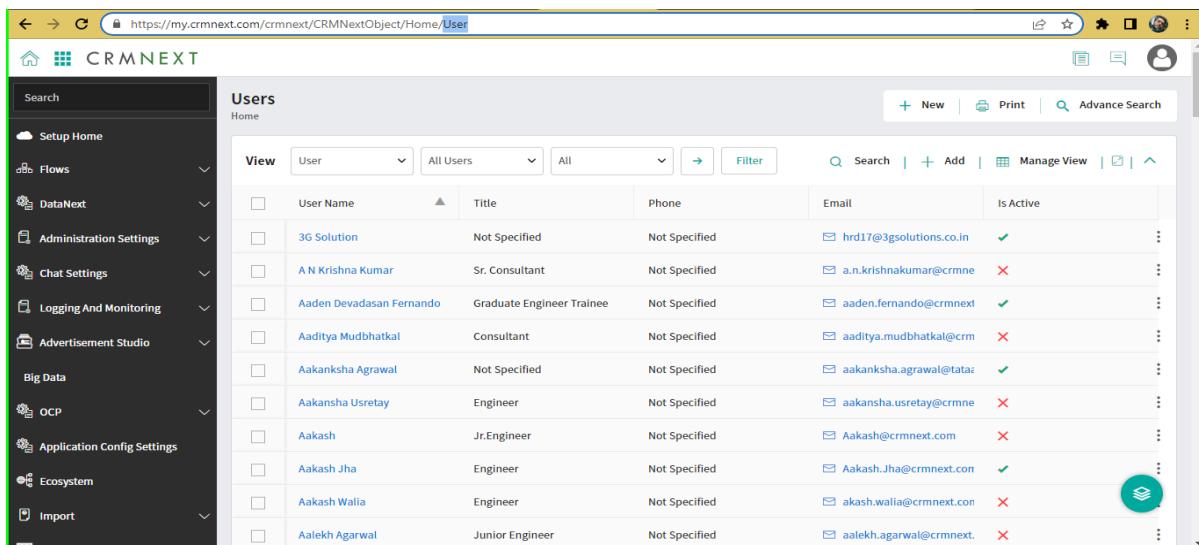
**Step to deactivate User.**

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



The screenshot shows the CRM NEXT My portal interface. The left sidebar contains various icons for navigation. The main area has two main sections: 'Summary' and 'Insight'. The 'Summary' section displays a calendar view from April 4, 2022, to April 11, 2022, with a message stating 'No Data Exists.' The 'Insight' section also displays a message 'No Record Found'.

**Step 2:** Go to “user” object.



The screenshot shows the CRM NEXT Users object page. The left sidebar includes a 'Setup Home' section and other administrative settings. The main area is titled 'Users' and displays a list of users with the following columns: User Name, Title, Phone, Email, and IsActive. The 'IsActive' column uses a green checkmark for active users and a red X for inactive users. A green circle highlights the 'IsActive' column header.

User Name	Title	Phone	Email	IsActive
3G Solution	Not Specified	Not Specified	hrd17@3gsolutions.co.in	✓
A N Krishna Kumar	Sr. Consultant	Not Specified	a.n.krishnakumar@crmn	✗
Aaden Devadasan Fernando	Graduate Engineer Trainee	Not Specified	aaden.fernando@crmn	✓
Aaditya Mudhatkal	Consultant	Not Specified	aaditya.mudhatkal@crm	✗
Aakanksha Agrawal	Not Specified	Not Specified	aakanksha.agrawal@tataz	✓
Aakansha Usretay	Engineer	Not Specified	aakansha.usretay@crmn	✗
Aakash	Jr.Engineer	Not Specified	Aakash@crmn	✗
Aakash Jha	Engineer	Not Specified	Aakash.Jha@crmn	✓
Aakash Walia	Engineer	Not Specified	akash.walia@crmn	✗
Aalekh Agarwal	Junior Engineer	Not Specified	aalekh.agarwal@crmn	✗

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

Filters X

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 X

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.

User Name	Title	Phone	Email	Is Active
Ambar Bishun	Graduate Engineer Trainee	Not Specified	ambar.bishun@crmnex...	✓
Ishu Ahlawat	Intern	Not Specified	Ishu.Ahlawat@crmnex...	✓
Ishu Testcase	Intern	Not Specified	IshuTestcase@crmnex...	✓
Rishu Sinha	Consultant	Not Specified	rishu.sinha@crmnex...	✗

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

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

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	<input checked="" type="checkbox"/>
LoginID	IshuTestcase@crmnnext.com	Disable Login Access	<input type="checkbox"/>
Email ID	IshuTestcase@crmnnext.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
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	<input type="checkbox"/>							
Login ID	IshuTestcase@crmnext.com	Disable Login Access	<input type="checkbox"/>							
Email ID	IshuTestcase@crmnext.com	Email Client User	<input type="checkbox"/>							
Mobile	+91 9667893701	Mobile User	<input type="checkbox"/>							
Title	Intern	Employee Code	IC9999							
Group	Global Operations	Sub Group	Biztech							
Default Territory	SAARC	Save	Cancel							

## Step 8: Now user have been deactivated.

on

**Employee**

Home > Detail

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
<b>Key Information</b>							
Id: 00003986				Name: Ishu Testcase			
Short Name: IshuTestcase				Active: <span style="color: red;">X</span>			
Login ID: IshuTestcase@crmnext.com				Email Client User: <span style="color: red;">X</span>			
Email ID: <a href="#">IshuTestcase@crmnext.com</a>				Disable Login Access: <span style="color: red;">X</span>			
Mobile: +91 9667893701				Mobile User: <span style="color: red;">X</span>			
Title: Intern				Employee Code: IC9999			
Group: Global Operations				Category_pj: Not Specified			
Band: 1				Sub Group: Biztech			
Location: Noida				Grade: E1			
Reports To: <a href="#">Ishu Ahlawat</a>				Default Territory: SAARC			
Employee Experience (At the time of joining): 0.0				Is Offline User: <span style="color: red;">X</span>			
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 CRM NEXT interface for managing employees. The top navigation bar includes a home icon, the CRM NEXT logo, a search bar set to 'Employees', an 'Advanced' filter button, and various system icons. The main content area is titled 'Employees' and shows a detailed view of an employee record. The employee's name is listed as 'IshuTestcase' with an employee code 'IC9999'. Other details include a profile image placeholder, gender 'E1', grade 'E1', location 'Noida', and a role 'Intern'. The 'EMPLOYEE DETAILS' tab is selected, showing sections for 'Particulars', 'Attachments', and 'Portfolio Details'. The 'Particulars' section contains numerous fields such as Userid, Band, Default Territory, Status Code, Group, Capability, Reporting Manager, Date of Joining, Email, Alternate No, Anniversary Date, and various project-related fields like Subgroup, Capability Sub Category, Reporting Manager 2, Project ID, Birthday, MobilePhone, Emergency Contact No, and Designation\_R. All fields appear to be populated with the same test data.

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

This screenshot shows the 'Employee' edit screen within the CRM NEXT application. The left sidebar contains a navigation menu with items like 'Setup Home', 'Flows', 'DataNext', 'Administration Settings', 'Chat Settings', 'Logging And Monitoring', 'Advertisement Studio', 'Big Data', 'OCP', 'Application Config Settings', 'Ecosystem', and 'Import'. The main content area is titled 'Employee' and has tabs for 'BASIC', 'USER SCOPE', 'ACCESS PERMISSION', 'TRAVEL DESK', 'EXIT', 'HEALTH INSURANCE', 'TAG', 'OTHERS', and 'SALES/KAM SPECIFIC DETAILS'. The 'BASIC' tab is selected, displaying fields for 'User Type' (set to 'Employee'), 'Name' (Ishu), 'Middle Name' (Testcase), 'Short Name' (IshuTestcase), 'LoginID' (IshuTestcase@crmnex.com), 'Email ID' (IshuTestcase@crmnex.com), 'Mobile' (9667893701), 'Title' (Intern), 'Employee Code' (IC9999), 'Group' (Global Operations), and 'Sub Group' (Biztech). A checkbox for 'Active' is checked. Below the form are 'Save' and 'Cancel' buttons. The overall layout is clean and modern, typical of a web-based enterprise application.

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

The screenshot shows the CRMNEXT software interface for managing employees. The main title bar says "CRM NEXT". Below it, a navigation bar includes "Employees" (selected), "Advanced", and search and filter icons. A toolbar on the right has "New" and "Print" buttons. On the left, there's a vertical sidebar with various icons. The main content area is titled "EMPLOYEE DETAILS" and shows a detailed view of an employee record for "Ishu Testcase".

Particulars	
Name	Ishu Testcase
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	<a href="mailto:IshuTestcase@crmnnext.com">IshuTestcase@crmnnext.com</a>
Alternate No	Not Specified
Anniversary Date	Not Specified
Role	Intern
Profile Image	
Gender	Not Specified
Grade	E1
Location	Noida
Subgroup	Not Specified
Capability Sub Category	Not Specified
Reporting Manager 2	Ishu Ahlawat
ProjectID	Not Specified
Birthday	Not Specified
MobilePhone	+91 9667893701
Emergency Contact No	Not Specified
Designation_R	Not Specified