

FAQ-076-Settings- How to deactivate a user account?



Find out the steps to take to deactivate a user account.



Requirements:

- Have the right to **manage accounts**.
- Have the right to **manually assign the follow-up of customers**.

Deactivating the account:

1

From the OpenFlex home page, click on your initials to access the platform settings.

The screenshot shows the OpenFlex home page interface. At the top, there is a navigation bar with tabs for Home, Vehicles, Opportunities, Customers, and Management. The user's initials 'AA' are visible in the top right corner, next to the text 'bee2link PP Vincent S.' and 'Point de vente 1 (Vincent S.)'. A dropdown menu is open, showing the user's role 'Administrateur ADMINISTRATEUR', the application language 'Anglais', and options for Notifications, Settings, Help centre, and Sign out. The main content area displays several statistics: 2647 Couleur, 52 Mes opportunités..., and 50 Voiture entité Rom... There is also a 'Print alerts' section at the bottom left with a 'Print' button.

2

You can then access the **configuration of user accounts, groups and permissions**.

Settings

- Group**
 - Group, entities and points of sale
 - Users, groups and permissions management**
 - Themes
- Stock**
 - Vehicles
 - Publications
 - Pricing policy
 - Electronic police book
- Opportunities**
 - Opportunities
 - Financing
 - Promotional offers
- Customers**
 - Customers
 - GDPR management
- Communication**
 - Internal notifications
 - Communication
- Miscellaneous**
 - Third-party tools
 - Accounting management

3

Next, scroll down the page to find the account you want to deactivate.

Users

Surname, first name, or email

Display: Only users of the entity bee2link PP Vi... | Sorted alphabetically | [Add a filter](#)

No filter applied | [Reset filters](#) | 15 Users

Administrateur ADMINISTRATEUR	Group Admin
Administrator and account management	100 Entities 171 Points of sale
Gilles ADMINISTRATEUR	Group Admin
Administrator	1 Entity 2 Points of sale

4 Once you have found the account in question, click on the **"Delete"** button.

SETTINGS > USERS, GROUPS AND RIGHTS > JOAN FERRAT

Joan FERRAT

Modify Delete Consult the group and permissions

SYNTHESIS

Identity

Joan FERRAT
j.f@orange.com
Administrator and account management

Group assigned
Admin
5 Users
Director

List of assigned points of sale

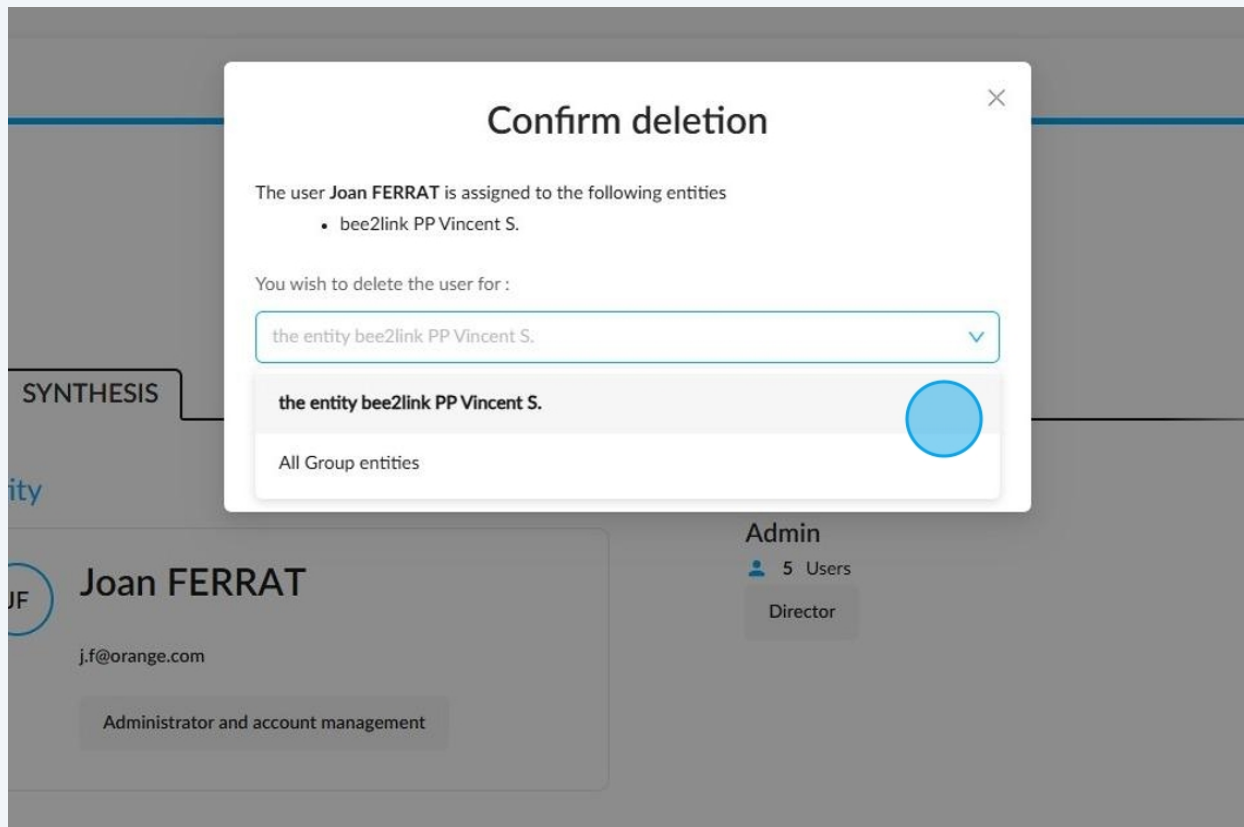
Name of the point of sale... 🔍

Point de vente 1 (Vincent S.) Head Office	PDV1@GMAIL.COM 683987406	Chalon-sur-Saône 71100
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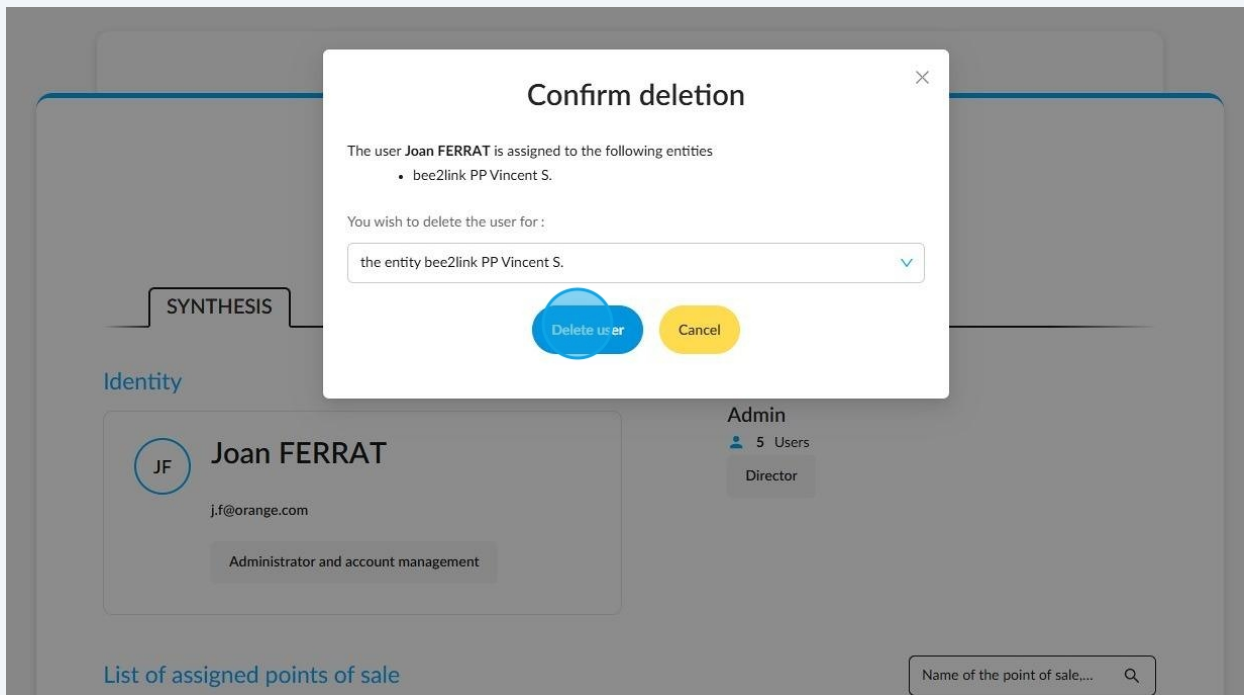
5 A confirmation message will then appear.

It will remind you of the list of different entities to which this account is linked.

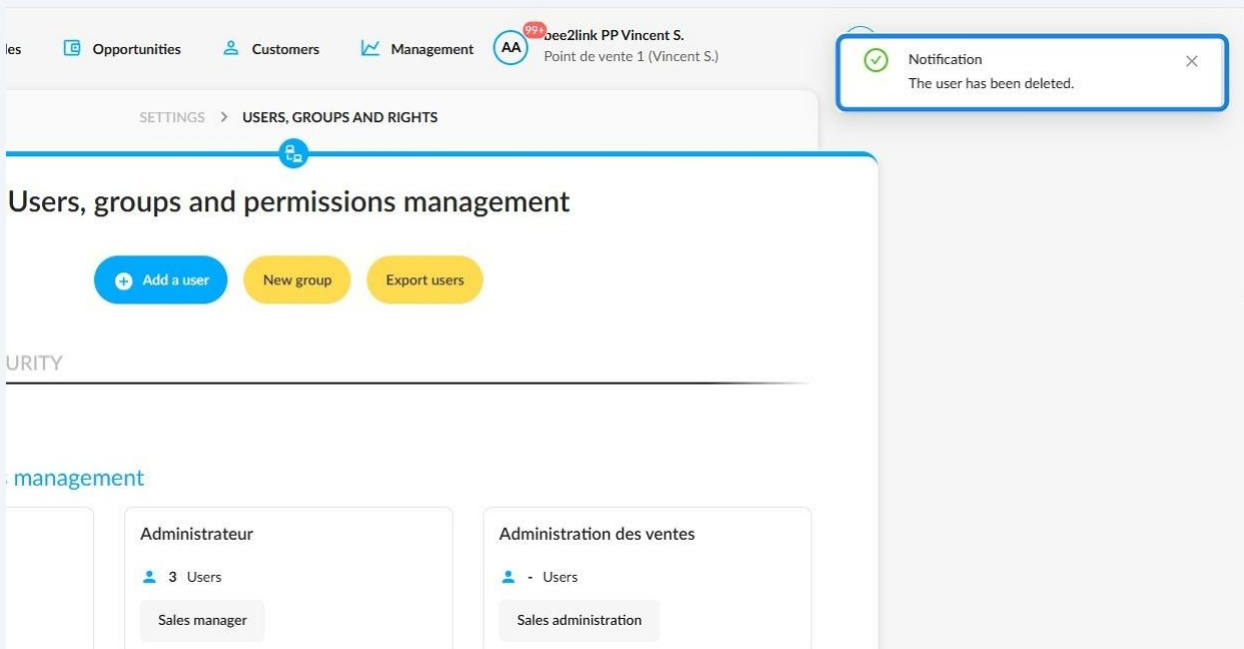
A drop-down menu allows you to select the entity(ies) to which the user's access will be removed.



6 Once you have made your selection, click on the "**Delete User**" button.



7 In order to confirm the deletion of the account, a notification will be displayed.



8

It is possible to identify deleted user accounts by filtering the list of users with the additional filter **'Inactive users'** condition: **'Yes'** / **'No'**.

Deleted accounts are easily identifiable by a logo indicating that they are inactive.

If necessary, the account of this user can be reactivated by adding it again to an entity.

The screenshot shows a user management interface. At the top right, there are pagination controls with a highlighted page '1'. Below this is a search bar containing the text 'joan'. The main section is titled 'Users' and includes a 'Display' dropdown set to 'Only users of the entity bee2link PP Vi...' and 'Sorted alphabetically'. A filter section shows 'Such as' with a dropdown set to 'Inactive users' and a condition dropdown set to 'Yes'. Below this, a 'Filters applied' section shows 'Inactive users' with a 'Yes' button and a trash icon. A 'Reset filters' link and '1 User' count are also present. The user list shows a single entry for 'Joan FERRAT' with ID '003ff997' and email 'j.f@orange.com'. A blue box highlights the user's name and details, and a blue arrow points from this box to a blue button labeled 'Add the user to the entity'.

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A '**Deleted**' note will also appear in the user's account.

SETTINGS > USERS, GROUPS AND RIGHTS > JOAN FERRAT

Joan FERRAT

Add the user to the entity

SYNTHESIS

Identity

Joan FERRAT
j.f@orange.com

Administrator and account management Deleted

Group assigned
No group

List of assigned points of sale

Name of the point of sale... 🔍

Reassignment of opportunities in progress:

10 To identify and reassign current opportunities, do the following:

Open the '**Opportunities**' module and add the following filters:

1. In the '**Location**' section, select the '**Salesperson**' filter to display the list of employees in a drop-down menu.
2. Then select the employee(s) you have deleted (*multiple selections possible*).

The screenshot shows the 'Opportunities' module interface. At the top, there are buttons for 'Create an opportunity' (blue), 'Export' (yellow), a search bar with the placeholder text 'Customer, offer number, registration or chassis', and a 'Filter' button with a '1' icon. Below these are two dropdown menus: 'Display' set to 'All opportunities' and 'sorted by' set to 'Date of last modification'. The 'Such as' section has a dropdown set to 'Salesperson' and a search input containing 'joa'. A dropdown menu is open below the search input, showing 'Joan FERRAT' with a blue circle highlighting it. To the right of the search input are links for 'New filter' and 'Close'. At the bottom of the filter section, it says 'No filter applied' on the left and 'Save search', 'Reset filters', and '8,078 opportunit' on the right.

11 1. Add the '**Opportunities**' filter in addition to the previous one (*under 'Status'*) and choose to display those that are '**In progress**'.

The screenshot shows the 'Opportunities' module interface with two filters applied. The 'Filter' button now has a '2' icon. The 'Such as' dropdown is set to 'Opportunities' and the search input contains 'Please select'. A dropdown menu is open below the search input, showing 'In progress', 'Won', and 'Abandoned', with 'In progress' highlighted by a blue circle. The 'Filters applied' section shows 'Salesperson: Joan FERRAT' and 'Status: In progress'. The search results show '1 opportunity'. At the bottom, there is a card for 'Joan FERRAT for: Angela BOWER' with email 'Nomail@gmail.com'. To the right, it says 'Opportunity 16806 modified 4 hours ago' and 'Internal request'. There are also icons for '1 offer', 'orders', 'comments', and 'Point de ven...'. A status tag 'In progress' is visible on the right.

12

You can then open each one to allocate them manually among the other sales representatives.

OPPORTUNITIES > OPPORTUNITY OF MRS ANGELA BOWER

Opportunity of Mrs Angela BOWER

In progress

★ ★ ★

Make a new offer Follow up with the customer Schedule an appointment Schedule a test drive appointment ...

SYNTHESIS HISTORY

Customer

Mrs Angela BOWER

Nomail@gmail.com
+33 6 84 52 31 74
14 Chemin de Launay Violette, 44300 Nantes, Pays de la Loire, France


Customer Nov 28, 2024

Seller

Point de vente 1 (Vincent S.)

Joan FERRAT
j.f@orange.com

[Change of salesperson](#)



13 Example of allocation to another salesperson.

The image shows a CRM interface with a modal window titled "Assign a seller". The modal contains a search bar labeled "Seller's name" and a list of four salespeople, each with an "Allocate" button:

- Administrateur ADMINISTRATEUR
- Gilles ADMINISTRATEUR
- Fernando ALONSO
- Raimonde ARON

At the bottom of the modal, there are navigation buttons: "<", "1", "2", and ">".

The background interface shows a customer profile for "Mrs Angela BC" with contact information: "Nomail@gmail.com", "+33 6 84 52 31 74", and "14 Chemin de Launay Violette". There are also buttons for "Make a new offer", "Customer", and "Future actions View calendar".