Deactivate a user profile %

It's not possible to delete user profiles, but you can deactivate them to remove access and free up the user profile for another user.

Deactivate a user profile

1. Navigate to Admin > Users.

	E-Commerce	Admin
uilder	E-Commerce Setup	Branding Center
Idcasts	Orders	Billing & Account Info
ation	Products	Users Jhn
	Payment Setup	Import Data

2. In the status drop-down, select Active to view all active user profiles.

Users 🗸	Import Data	Data Cleanup	Analytics	Reports 🗸	Settin	gs
					Add U	Jsers Ad
Search		Status	Active or In	ivited	~	
			Active or In	nvited		
			Active			
			Invited	5		
			Inactive			EQ
			Show all			DO .
Email			Status			Permissions

3. Click the user name.

	ld ↓	Name	Username
	53	Phillip Michieli 🕑	phillip.mi
	21	Tessa Randall	tessa.rar

4. Scroll down and click the **Deactivate** button.

Save Edit User Permissions Deactivate
Follow-Up Sequence Mail Accounts Legacy Mail A

5. Click OK.

	ly739.infusionsoft.com says		
	Are you sure you want to deactivate this user? They will not be able to log in.		
ınt In		ОК	b

6. You are about to deactivate a user. Before doing so, reassign the user's active accounts to other users, e.g., # of Contacts assigned, # of leads (opportunities) assigned and Pending tasks. In the image below, it indicates that there are 104 contacts assigned to the user you are about to deactivate, and zero of those are assigned to new users.

You are about to deactiv following:	vate a User. Before do	ing so, you have to transfer this User's active accounts to another Use
# of Contacts Assigned	to User: 0/104	
# of Leads Assigned to	User: 0/92	
# of Pending Tasks for t	his User: 0 /12	5
Reassign Logic (Con	tact)	
 Ratio - Each user g Hardcoded - Each 	ets up to the amount s user gets up to the am	specified; the process repeats for extras. nount specified; extras are not reassigned at all.
Ratio - Each user g Hardcoded - Each Choose Number of C	ets up to the amount s user gets up to the am	specified; the process repeats for extras. nount specified; extras are not reassigned at all. n to Each User
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Ratio - Each user g Hardcoded - Each Choose Number of C Round Robin Alwayshelpful Support Amanda Madsen Geraldine Vaughn	Contacts to Reassign 0 0 0	specified; the process repeats for extras. nount specified; extras are not reassigned at all. n to Each User Please select one

7. You can choose Ratio to evenly distribute the contacts among the available users; or use Hardcoded to specify the exact amount of contacts to each available user profile. As you assign the number of contacts to the available users, notice that the number of assigned contacts listed above will increase to match it. When

all contacts are accounted for; e.g., 104/104, then move to the Leads section to assign those.

# of Leads Assigned to	User: 0 /92		
# of Pending Tasks for I	this User: 0 /12		
Reassign Logic (Con	tact)		
Ratio - Each user o	iets up to the amount	specified: the process repeats for extr	as.
Hardcoded Each	user gets up to the a	mount specified: extras are not reasold	upod at all
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Choose Number of (Contacts to Reassig	gn to Each User	
Choose Number of (Contacts to Reassig	gn to Each User	
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Choose Number of G Round Robin Alwayshelpful Support Amanda Madsen Geraldine Vaughn Mathew Magwood	0 5 50 20	Please select one	¥

8. Once you have reassigned all Contacts, leads (opportunities), and tasks, click the Process button. This action frees up a user license that you can assign to someone else. The only exception is when partners are deactivated (users with a P next to their name), since partners do not require a user license.

Cancel a new user invitation

1. Navigate to Admin > Users.

E-Commerce	Admin	
E-Commerce Setup	Branding Center	
Orders	Billing & Account Info	
Products	Users	
Payment Setup	Import Data	

2. In the status drop-down, select Invited to view all invited users.

Users 🗸	Import Data	Data Cleanup	Analytics	Reports 🗸	Setti	ngs	
					Add	Users A	١d
Search		Status	Active or In Active or In Active Invited Inactive	nvited nvited	~	50 ×	n
Email			Show all			Permissions	

3. Click the user name (link).

	ld 🗸	Name	Usernam€
	53	Phillip Michieli P	phillip.mi
	21	Tessa Randall	tessa.rar

4. Scroll down and click the Cancel Invitation button.

FAQ

I just deactivated a user profile, can I put it back the way it was?

Once you click Process to deactivate a user, this cannot be undone. If you need to make changes, you can manually reassign contacts, leads, and tasks.

What if I want to assign an Opportunity to another user profile that is not listed?

This means the user you are looking for needs to be added to the Sales Rep group.

What happens to the contacts, tasks, opportunities, and notes assigned to a deactivated user?

When you deactivate a user, completed tasks are removed. You will be asked only who to assign the Pending tasks to. Notes are not affected when you deactivate a user.

Will this user be removed from my monthly bill?

Deactivating a user does not remove the user license from your account. It frees up the user profile so that you can assign it to a new user.

Is there any way to identify who set up a new user and when?

There is no record of who set up a user, but it can only be done by a user with permissions to add users to your application.

What happens if I reassign tasks to the wrong user?

Make sure you are assigning tasks to the correct user because once the action is processed there isn't a way to undo. However, you can manually reassign tasks to another user.