

7. How to Deactivate an Employee

Deactivating an employee suspends their access without removing their record; this preserves audit history and any associations (tickets, notes, etc.) while preventing further logins or assignments. If you need to remove someone, use **Delete** instead permanently—but note that deleted accounts **cannot** be restored.

Warning: Deleted employees cannot be restored.

Difference Between Deactivate vs. Delete

1) Deactivate

Account remains in the system (with all history intact).

The user cannot log in, receive notifications, or be assigned to Projects/Desks.

Ideal for long-term leaves or contractors between engagements.

2) Delete

Permanently removes the user record and all associated data.

Cannot be undone—use only when you're sure the account is no longer needed.

Step-by-Step Deactivation

Step 1. Open the Employees List

In the left-hand navigation panel, click **Employees**.

Locate the person you want to deactivate—use the **Search...** box or **Filter** if needed.

Step 2. Enter Edit Mode

In that employee's row, click the ⇨ **Edit** icon in the **Actions** column.

The **Edit employee** form appears, showing their current settings.

Step 3. Uncheck "Active"

Under the **General** section, find the **Active** checkbox.

Click to remove the checkmark—this flag will switch to "Deactivated manually" and display a reason code.

Note: You may see a tooltip like "Deactivated manually. Code reason: 1100" indicating the change was performed by an administrator.

Step 4. Save Your Changes

Scroll to the bottom-left of the form and click **Save**.

You'll return to the Employees list; the deactivated user will no longer appear in active workflows or lookup lists.

What Happens Next?

1. The user's **Last login**, **Tickets**, and **Calendar** events remain intact for reporting and audit.
2. Any open assignments (e.g., tickets, leads) will need re-assignment to active team members.
3. To reactivate later, simply edit their record again and re-check the **Active** box.

You cannot delete an employee directly from the **Employees** module. **To delete an employee:**

1. Remove the employee from all **Desks** they are assigned to. Instruction is [\[here\]](#)
2. Remove the employee from all **Projects** they are assigned to. Instruction is [\[here\]](#)

Revision #23

Created 3 September 2024 15:25:03

Updated 25 January 2026 13:47:15