

DEACTIVATED USERS

REMOVING A USER

Deactivating - or removing - a user from Express can be done at any time, but it is recommend to wait until the last period that a user gets commission in, is closed.

For example, if a rep still earns commission in the March period, it is recommended to wait until the March period is closed and the system is now in April to remove that user.

There are two steps to deactivating a user:

1. Uncheck the user from Manage Users section in Express to remove their Express License.
2. Unselect “Active” in Salesforce to remove their Salesforce license.
3. Remove their Express License

INCORRECTLY REMOVING A USER

If a user is accidentally removed from Express and then added back in, in the same period they were removed and no calculations have run in between the time they were removed and added back, that user’s results will remain as they were before.

If a user is removed and either calculations have run in between when they removed and when they were added back in or they are added back in, in a different period, then that user is considered a new user and will need to be added back to the plan(s) and calculations will need to be re-run. All past period, historical payout results and credits, will not be associated to that user.

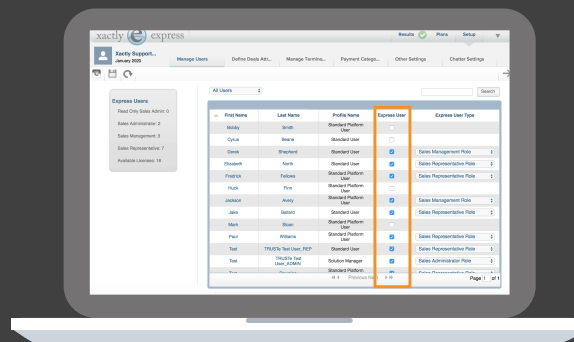
HOLD BALANCES

If a user has a hold balance, the user will continue to show in Express under the Payments tab in the Admin view as well as the Payroll File until all holds have been released or deleted from the system.

The hold(s) will release or delete depending on the normal scheduled release timeline. In other words, if you have a user that is deactivated in March, with a hold balance and that hold balance is not released until the October period, the user will remain under the Payments tab in Express and on the Payroll File until the October period is closed. The November period will no longer show the user in either section.

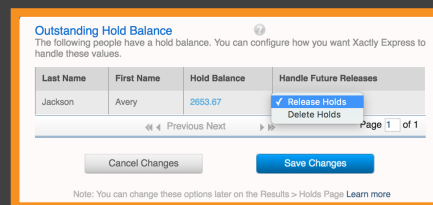
Additionally, a hold on a deal is associated to more than one user and that hold is deleted, it will be deleted for all users associated, either active or deactivated.

EXPRESS SEAT



It is recommended to remove user’s seat first, under the Manage Users section in Express by going to Express > Setup > Manage Users > deselect the user.

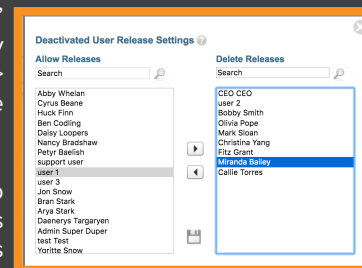
Once a user is removed, a pop up screen will appear prompting how the user’s holds - if any - should be handled. The Admin has the option to select either "Delete" or "Release" for all holds. There is not an option to delete some holds automatically, but release others in this pop up window. This can determined when the hold is released from the system.



The Outstanding Hold Balance that appears shows all holds from the beginning of time. This does not reflect the current hold balance, if any.

If an Admin incorrectly selects “Cancel Changes” or “Save Changes” in the pop up window, they can go to Results > Manage Results > Holds > Click “Options” in the upper right corner of the page > select “Manage Deactivated Users”.

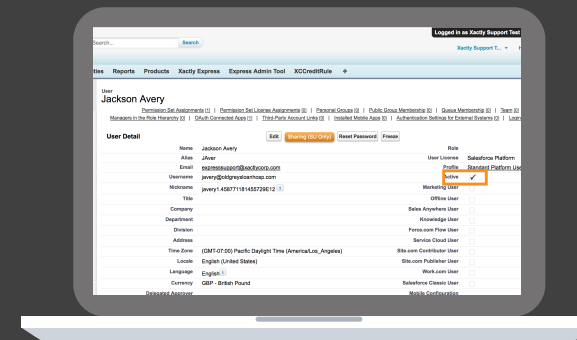
Users can be moved from the “Allow Releases” to “Delete Releases” columns and vice versa. This will apply to all current and future period releases for that user.



EXPRESS DASHBOARDS

The dashboard view is intended to represent what the End User would view. Once a person is removed, they can no longer get visibility into their dashboard. The same goes for the Admin, they will no longer see the rep’s dashboard under “Log in As” once the user has been deactivated.

SALESFORCE LICENSE



If the user’s Salesforce license is removed first, it will automatically remove the user from Express. The next time the Admin accesses Express they will be prompted to Release or Delete the now deactivated user’s holds - if any.

To do this go to Salesforce > Setup > Manage Users > Users > Select the user who should be deactivated > click “Edit” > uncheck “Active” > Save.

If a user leaves the company before the period in Express is closed there are two possible workarounds to deactivate a user, but keep them in Express:

1. Change the username and email within Salesforce to the Sales Admin, but keep the rep’s account active so they can no longer access their Salesforce, but they still have a license in Express. This does not free up a license.

2. Under the User’s Details in Salesforce, change the User’s License to Salesforce Platform - if it is not already selected - and click “Freeze”. This will temporarily freeze the user’s account so they cannot log into Salesforce and therefore access Express. This does not free up a license.

EXPRESS LICENSE

Since the Express License and Express Seat are separated, Admins will also need to go to Salesforce > Setup > Installed Packages > under Xactly Express click “Manage Licenses” > locate the user and click “Remove”.

This will not be automatically done when either the Seat or Salesforce License is removed.

NOTE: Not all users will have an Express License. This gives a user access to view Express and may not have been selected for a user previously.