Managing User Lifecycle in the Admin Portal

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Opening the user directory and finding the right account

In Sherkety ERP & Website Platform, open the **Admin Portal** and go to **Users** to work with account records. This screen is the main directory for user lifecycle tasks, including reviewing account status, opening individual profiles, and checking whether someone is active, invited, suspended, or deactivated. If you already read Understanding Role Visibility and Access Restrictions, use that guidance here when deciding which accounts you should expect to see.

1. Sign in to the **Admin Portal**.
2. Open the **Users** section from the admin navigation.
3. Look at the user list and identify the columns that help you confirm the right person, such as name, email address, username, and status.
4. Use the **Search** box to narrow the list. Search by the person’s name first, then try their email address or username if needed.
5. Use the status filter to focus the list on the right lifecycle stage, such as **Active**, **Invited**, **Suspended**, or **Deactivated**.
6. Click the user’s row in the results table to open the full account record.

Once you open a user record, review the visible profile details before making changes. Check the displayed name, contact information, current role assignment, and the status badge shown on the profile. This helps you avoid editing the wrong account, especially when two users have similar names.

[SCREENSHOT: Users directory with search box, status filter, and status badges]

If the list is long, combine search and status filtering instead of scrolling through every row. For example, if you know the person has not yet signed in, filter by **Invited** before searching. If you are checking whether access was removed, filter by **Suspended** or **Deactivated** and then open the profile to confirm the current state.

Creating accounts and setting initial access

When you need to add a new person, create the account from the **Users** area so it appears immediately in the directory and can be managed like any other user record. The account setup process focuses on identity details, starting access, and the initial lifecycle status.

1. In **Users**, click **Add User**.
2. Enter the person's core details in the form, including **Full Name**, **Email**, **Username**, and **Department**.
3. Choose the starting role or permission set from the access controls shown on the form.
4. Set the account status to **Invited** or **Active**, depending on how you want the person to begin using Sherkety ERP & Website Platform.
5. Save the account.
6. Send the invitation email if that option is shown during or after saving.
7. Return to the user directory and confirm the new account appears with the expected status badge.

Use **Invited** when the person still needs to complete first-time sign-in. Use **Active** when the account should be ready for immediate use. After saving, always verify the status badge in the list so you can catch setup mistakes early.

The account form is also where you set the user up for the right level of access from day one. Choose carefully, but do not worry about getting every detail perfect at creation time. You can adjust roles and access later from the user's profile without creating a new account.

A quick review after creation helps prevent confusion:

- Confirm the **Email** field is correct before sending an invitation.
- Check that the selected role matches the person's job responsibilities.
- Make sure the status badge in the directory matches your intent: **Invited** for pending setup or **Active** for immediate access.

[SCREENSHOT: Add User form showing identity fields, role selection, and status options]

Updating profile details, roles, and access over time

User accounts rarely stay the same. In Sherkety ERP & Website Platform, you can return to a user profile at any time to update personal details, adjust access, or change lifecycle status as the person's responsibilities change. For a broader view of the directory and account records, see Viewing and Maintaining User Accounts.

1. Open **Users** and search for the account you want to update.
2. Click the user record to open the profile page.
3. Edit the fields that need maintenance, such as **Display Name**, **Email Address**, **Phone Number**, or **Team Assignment**.
4. Update the role or permission group if the user's work has changed.
5. Click **Save** to apply the changes.
6. Review the profile again to confirm the updated values and current status.

When someone moves to a new team or takes on different responsibilities, update their role assignment directly on the profile instead of creating a second account. This keeps the person's history in one place and makes later reviews easier. After saving, check that the role shown on the page matches what you selected.

You may also need to manage access without changing profile details. Use the account actions menu on the user profile when you need to:

- resend an invitation
- reset access-related settings
- change the lifecycle status
- prepare the account for suspension or deactivation

These actions are useful when the user record is correct, but the person's access needs attention. For example, if someone never received their original invite, open the same account and resend it rather than creating a duplicate. If the person is temporarily stepping away from work, review whether **Suspended** is more appropriate than **Deactivated**.

[SCREENSHOT: User profile page with editable fields, role area, Save button, and account actions menu]

Reviewing account history and administrative activity

Before changing a user's access, it is good practice to review the account history on their profile. Sherkety ERP & Website Platform includes an activity or audit area that helps you confirm what changed, when it changed, and which administrator performed the action. This is especially helpful when several admins manage users or when you need to understand why an account currently looks the way it does.

1. Open the user’s profile from **Users**.
2. Go to the **Activity** or **Audit** area on that record.
3. Review the history entries for profile updates, role changes, invitation actions, suspensions, or deactivations.
4. Check the timestamp on each entry to understand the order of changes.
5. Look for the administrator name attached to each action.
6. Compare the most recent history entry with the current status badge and role shown on the profile.

Use this history view when something seems inconsistent. For example, if a user appears to have the wrong access after a recent update, the activity list can show whether the role change was saved, whether an invitation was resent afterward, or whether the account was suspended later by another administrator.

The history area is also useful for confirming routine lifecycle events:

- when the account was created
- when an invitation was sent or resent
- when the account moved from one status to another
- when profile details were edited
- when access assignments were updated

[SCREENSHOT: User activity or audit panel showing dated entries and administrator names]

Always compare the current profile with the latest history entry before making another change. If the newest entry already reflects the action you planned to take, pause and confirm whether any further update is actually needed. This avoids unnecessary edits and keeps the account record easier to follow.

Suspending and deactivating accounts when access should end

When a person should no longer use Sherkety ERP & Website Platform, choose the account status carefully. **Suspend** and **Deactivate** are not the same. Suspension is useful when access should pause temporarily, while deactivation is the better choice when the person should no longer sign in and the account should move out of the active user population.

1. Open the user’s profile from **Users**.

2. Open the account actions menu.
3. Select **Suspend** if access should be paused without removing the account record.
4. Select **Deactivate** if the person should no longer sign in.
5. Confirm the action in the confirmation prompt.
6. Return to the profile and the user directory to verify the updated status badge or lifecycle label.

After the change, check both places where status appears:

- the badge or label on the user profile
- the status shown in the user directory list

This double-check matters because it confirms the lifecycle update was applied and that the account now appears in the correct filtered view. For example, a deactivated account should no longer appear as active when you filter the directory.

Suspending or deactivating an account does not mean you lose the record. The profile can still retain important information for administrative review, including:

- profile details
- role assignments
- previous status changes
- account history and audit entries

[SCREENSHOT: Account actions menu with Suspend and Deactivate options, followed by confirmation dialog]

Choose **Suspend** when you may need to restore access later without treating the person as a brand-new user. Choose **Deactivate** when access should end and the account should remain only as a retained record for future reference or possible reactivation decisions.

Fixing common user management problems

Most user lifecycle issues in Sherkety ERP & Website Platform come down to search filters, invitation status, or an account status that was changed differently than expected. When something looks wrong, start with the user record itself and then compare it with the directory filters and account history.

If you cannot find a user in **Users**, try these checks:

- Clear any status filter that may be hiding the account.

- Search by **Email Address** instead of name.
- Try the **Username** if the name returns too many results.
- Confirm you are working in the correct admin area and not relying on an old browser tab.

If a user says they never received their invitation:

- Open their profile from **Users**.
- Check the **Email** field for mistakes.
- Confirm the account still shows **Invited**.
- Use the account actions menu to resend the invitation.

If access still looks wrong after a role change:

- Reopen the user record after saving.
- Verify the selected role or permission group is still displayed.
- Review the activity or audit area for the latest update.
- Confirm another administrator did not make a later change.

If a former user still appears active:

- Open the account and check the current status badge.
- Confirm whether the account was marked **Suspended** instead of **Deactivated**.
- Use the account actions menu to apply the correct lifecycle status.
- Return to the directory and verify the account appears under the expected status filter.

[SCREENSHOT: Users list with filters cleared and a user profile showing status and activity history]

When troubleshooting, avoid creating a second account for the same person unless you are certain no existing record is present. In most cases, the fix is in the original profile: correcting the email, resending the invite, updating the role, or changing the lifecycle status.

Overview

Managing user lifecycle in Sherkety ERP & Website Platform means following an account from creation through day-to-day updates and, when needed, suspension or deactivation. The main place for this work is the **Users** section in the **Admin Portal**, where you can search the directory, open a profile, review status, and take account actions from one record.

The lifecycle usually follows a simple pattern:

- create the account with the right identity details
- assign the starting role or permission set
- set the initial status as **Invited** or **Active**
- update profile details and access over time
- review activity history before major changes
- suspend or deactivate the account when access should end

This document focuses on those practical admin tasks. It does not repeat the visibility rules already covered in Understanding Role Visibility and Access Restrictions. Use that document when you need to understand why certain users or role options may be visible to one administrator and not another.

As you work through lifecycle changes, pay attention to the account's visible status badge, the role shown on the profile, and the activity history attached to the record. Those three areas give you the clearest picture of the account's current state. They also help you avoid common mistakes such as resending an invitation to an already active user or suspending someone when you intended to deactivate them.

[SCREENSHOT: Admin Portal Users section showing directory, selected user profile, and status indicators]

The next document, Assigning Roles and Understanding Visibility Rules, goes deeper into choosing the right access level and understanding how role assignments affect what each user can see.

Prerequisites

Before you manage user lifecycle tasks in Sherkety ERP & Website Platform, make sure you have the right access and that you can reach the **Users** area in the **Admin Portal**. You do not need advanced setup knowledge, but you should be comfortable opening admin pages, searching lists, and saving changes on profile forms.

You should have:

- permission to sign in to the **Admin Portal**
- access to the **Users** section
- enough visibility to open user profiles and use account actions

- a clear understanding of your organization’s role and access rules

It also helps if you already know how user records are displayed in the directory. If you have not reviewed that yet, read Viewing and Maintaining User Accounts first. If you need a refresher on why some records or actions may not be available to you, return to Understanding Role Visibility and Access Restrictions.

Before creating or updating an account, gather the details you expect to enter or verify:

What to confirm	Why it matters
Full name	Helps identify the correct person in the directory
Email address	Needed for invitations and account communication
Username	Helps with searching and account identification
Department or team	Supports profile accuracy and organization
Starting role	Determines the user’s initial access

If you are planning to suspend or deactivate someone, review the user’s current status and recent activity first. That quick check helps you choose the correct action and keeps the account history easier to understand for other administrators.