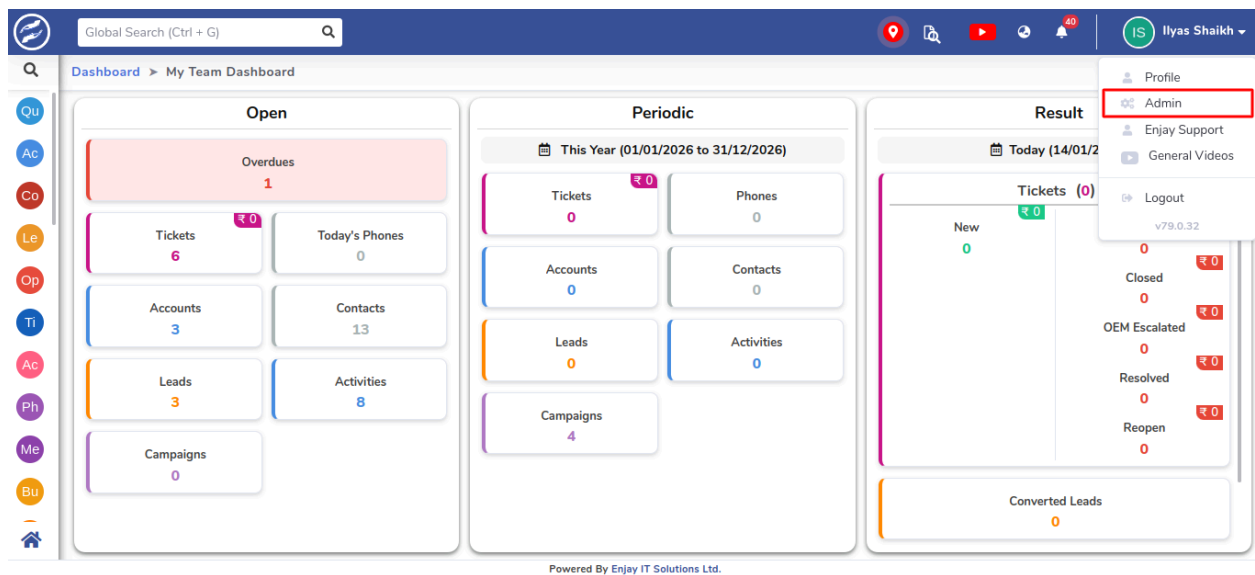


# Lock Records Feature Administration Guide

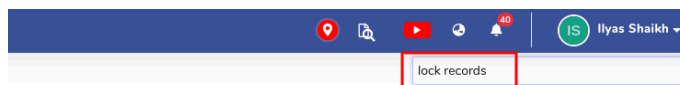
The Lock Records feature is designed to automatically restrict the modification or deletion of records once they satisfy specific, predefined business conditions or reach a certain stage in a process (e.g., sales or service). This ensures data integrity and process compliance

## Configuration Steps

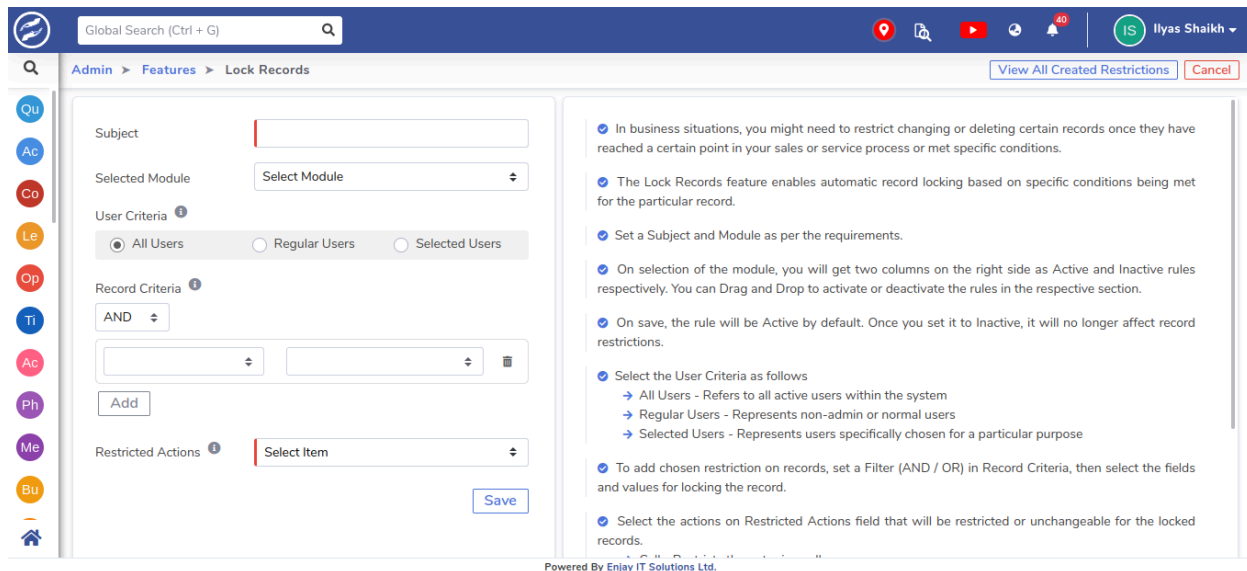
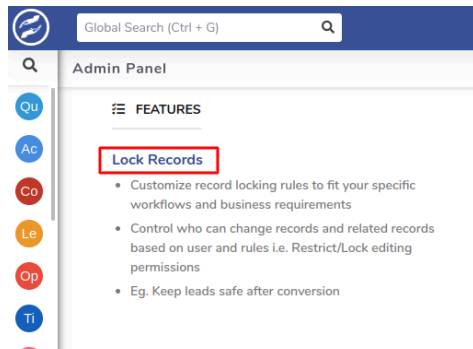
1) Go to the **Admin** panel:



2) **Search** for Lock Records:



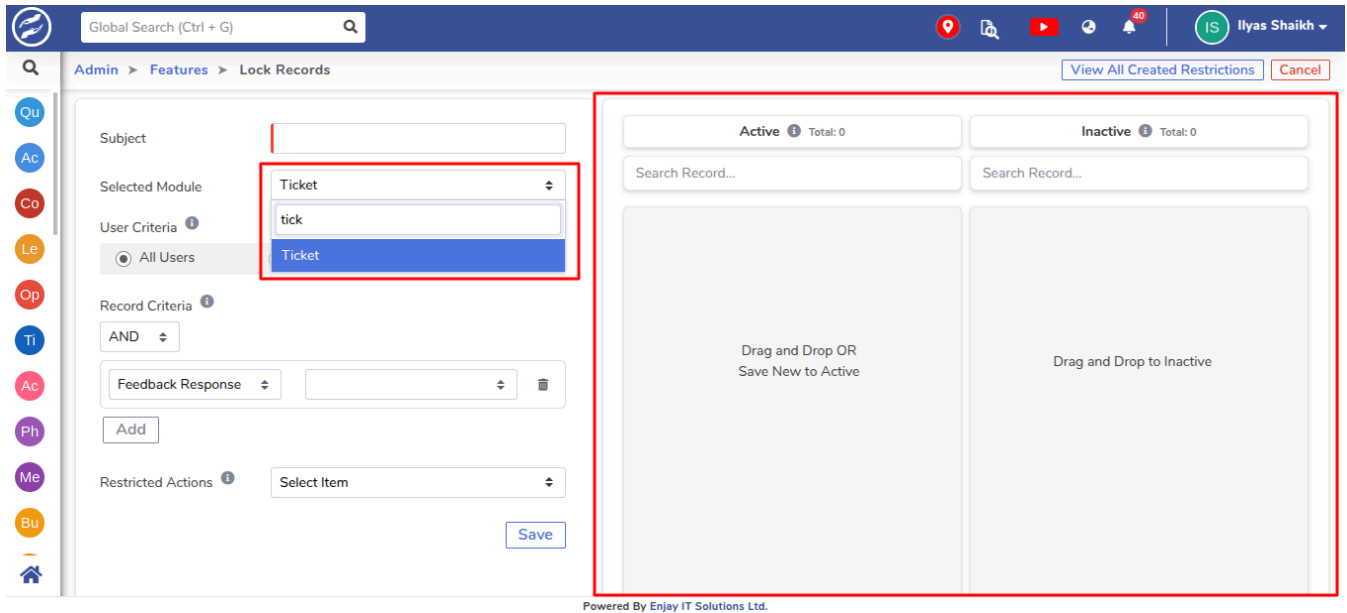
### 3) Open Feature: Click on Lock Records Feature.



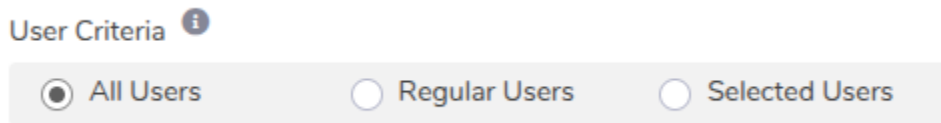
- The configuration screen displays a detailed description on the right and the configuration management panel on the left.

### 4) Select Module: Choose the desired Module Name.

- The left panel will separate into Active and Inactive sections for managing your configurations.
- Provide a clear subject for your restriction criteria.



5) **Set User Criteria:** Define which users the restriction applies to:



**In the User Criteria section, you will see 3 types of user criteria:**

1. **All Users:**  
The restriction criteria will be applied to all users.
2. **Regular Users:**  
The restriction criteria will be applied only to regular users.
3. **Selected Users:**  
You can manually select the specific users for whom you want the record restriction to apply.

6) **Define Record Criteria:** Establish the conditions for when a record should be locked.

Subject: If Ticket is closed then Lock

Selected Module: Ticket

User Criteria:  All Users  Regular Users  Selected Users

Record Criteria: AND

Status: Closed

Add

Restricted Actions: Select Item

Save

- Use the Add button to create multiple rules.
- All select and multi-select fields from the chosen module are available for defining criteria.
- Rules can be removed by clicking the bin icon.

7) **Select Restricted Actions:** Choose from a total of 14 actions to prohibit once a record is locked.

User Criteria:  All Users

Record Criteria: AND

Status: [dropdown]

Add

Restricted Actions: Select Item

Save

Search

SELECT ALL

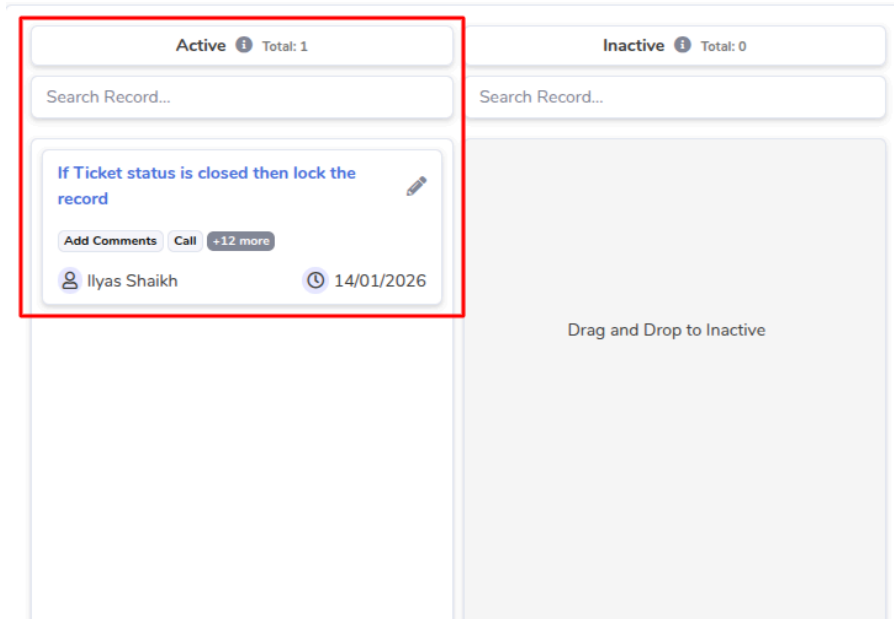
- Add Comments
- Call
- CheckIn CheckOut
- Delete
- Duplicate

## **Available Restricted Actions**

Action	Restriction Details
Add Comment	Prevents users from adding comments in both detail and edit views.
Call	Restricts outgoing calls from the record level (incoming calls will still be logged).
Checkin Checkout	Disables the Check-in and Check-out options.
Delete	Removes the delete option for the record.
Duplicate	Disables the duplicate option.
Edit	Removes the edit button for the record.
Email	Hides the email button on the record.
Lock Attachments	Restricts the attachment field in the edit view. Disables Select and Create in the Attachment subpanel. Existing attachments are also locked.
Lock Related Records	Locks all records associated with the parent record, applying all restricted actions except this one.
Mass Actions	Restricts all mass actions in the list view for the selected records.
Relate and Unlink Data	Prevents restricted records from being linked to other records or unlinked from existing relationships.
SMS	Hides the SMS button on the record.
Tags	Users cannot add new tags or remove existing tags.
WhatsApp	Hides the WhatsApp icon in both the list and detail views.

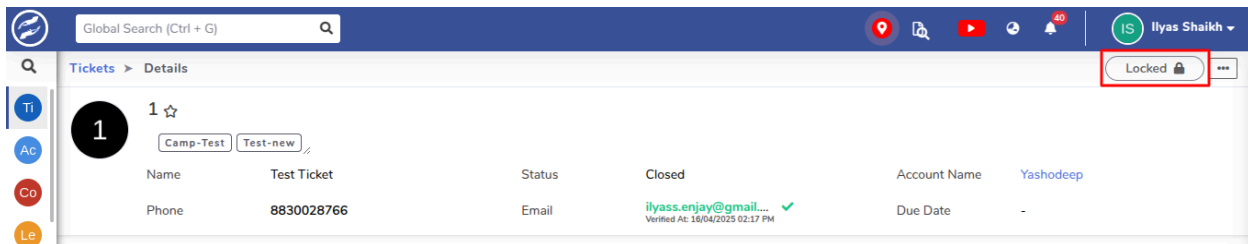
## **Activation and Management**

1. Save: After completing the steps, save the configuration. It will appear in the Active section.
2. Toggle Status:
  - Deactivate: Drag a configuration from Active to Inactive.
  - Activate: Drag a configuration from Inactive to Active.



Once these steps are completed, records that meet the defined criteria will be locked. In the detail view, a Locked badge will be displayed, and in the list view, a locked icon will appear, as shown in the image below.

### Locked record - Detail View:



### Locked records in - List View:

