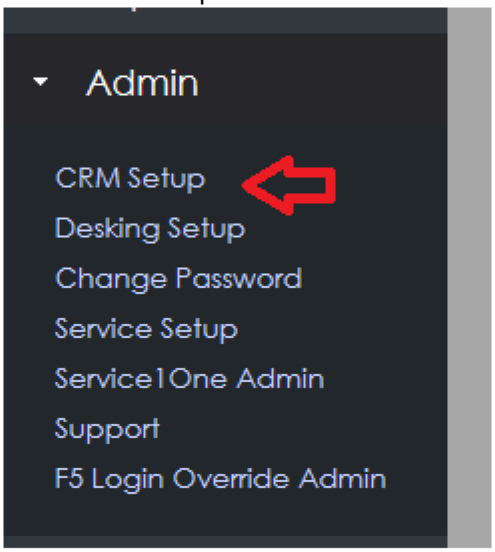
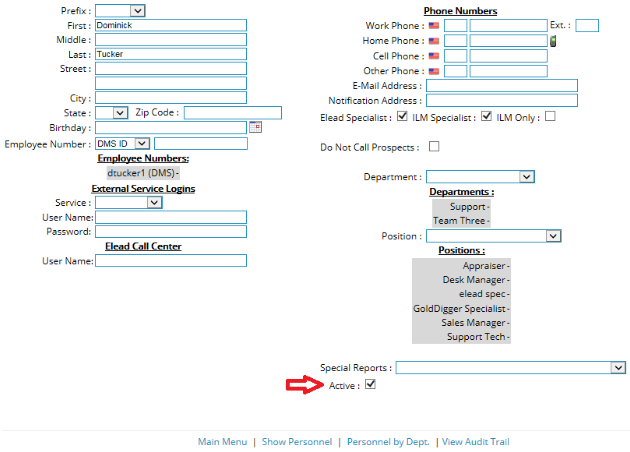
How to inactivate personnel:

1. Select Admin
2. Select CRM Setup



3. Select Personnel

4. Select associate
5. Uncheck box that says 'Active'



6. Save

Best Practices:

1. If your dealership reuses employee numbers, delete the DMS number in the Personnel Profile and replace it with a dummy number and save
2. When inactivated, there will be no salesperson following up with the customers assigned to the salesperson leaving. You can reassign these customers, in mass, via advanced search.
3. Some Salespeople do not leave on good terms. With the CRM being a web-based application, that Salesperson can access the customers from anywhere with a computer and an internet connection. To prevent this, change this users password BEFORE inactivation.