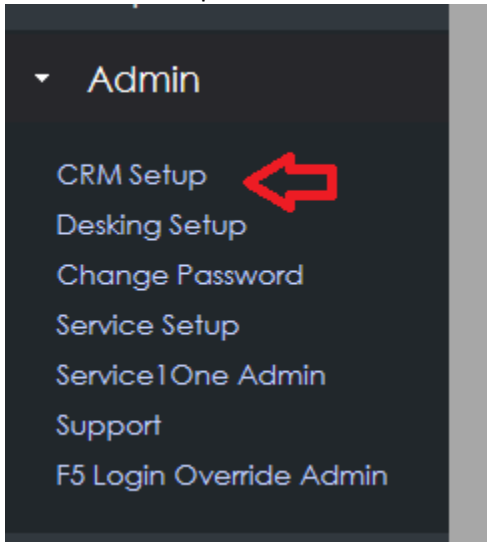


How to inactivate personnel:

1. Select Admin
2. Select CRM Setup



3. Select Personnel



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

Prefix:
 First:
 Middle:
 Last:
 Street:
 City:
 State: Zip Code:
 Birthday:

Employee Numbers:
 Employee Number:

External Service Logins:
 Service:
 User Name:
 Password:
Lead Call Center:
 User Name:

Phone Numbers:
 Work Phone: Ext.:
 Home Phone:
 Cell Phone:
 Other Phone:
 E-Mail Address:
 Notification Address:
 Elead Specialist: ILM Specialist: ILM Only:
 Do Not Call Prospects:

Department:
Departments:
 Support:
 Team Three:
 Position:
Positions:
 Appraiser-
 Desk Manager-
 elead spec-
 GoldDigger Specialist-
 Sales Manager-
 Support Tech-

Special Reports:
 Active:

[Main Menu](#) | [Show Personnel](#) | [Personnel by Dept.](#) | [View Audit Trail](#)

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.