How to inactivate personnel:

- 1. Select Admin
- 2. Select CRM Setup



3. Select Personnel

	Company Management
	Android Mobile App
	Application Settings
	Change Default Processing Date
	Change Password
	Change Task DueDate
	Daily Workplan Tracking
	Default Appraisal Adjustments
	Department Maintenance
	Do Not Call Registry
	Email Alerts
	Email Maintenance
	Fiscal Month Setup
	Forecasting
	Holidays Maintenance
	Integration Company
	Lead Assignment Rules
	Lead Provider Setup
	Manage Company Info
	Manage Company Warranties
	Manage Deal Maker
	Manage Default Comments
	Manage Inactive Details
	Manage Internet Lead Reception Availability
	Manage Sales Status
	Manage Service Status
	Manage Sources
	Manage Vehicle Optional Equipment
_	Monthly Sold Count (Sales Person)
	Personnel
	Personnel - New
	Position Maintenance
	Preferences
	Pricing Rules
	Report Subscriptions
	Schedule Maintenance
	Social Media Maintenance
	Template Categories Admin
	Template Copy Utility
	Trade Group User Map
	Trade Groups
	We Owe Code Company Mappings

- 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.