

# Disabling A User

To disable a user in your PlayMaker account, follow these steps:

- Click on *Settings* in the top right corner of the PlayMaker web application.
- Click *Users* in the Settings Links & Tools box on the left side of the window.
- Check the box in the left column next to the user that needs to be disabled.
- In the Bulk Actions drop-down menu (found below the list of active users) select *Disable User*.
- A prompt displays, allowing the administrator to:
  - Assign owned Contacts to an existing user
  - Assign owned Accounts to an existing user
  - Assign owned Referrals to an existing user
    - **Note:** Leaving referrals assigned to the disabled user does not remove them from PlayMaker. We suggest not transferring referral ownership, to maintain historical reporting accuracy.

Manage Users

If you would like to transfer ownership of contacts, accounts or referrals for the following user, please do so below. Otherwise, all contacts and accounts belonging to this user will be left as is.

**Jane Berman (51 contacts, 42 accounts, 845 referrals)**

Transfer owned Contacts to:    Me

Transfer owned Accounts to:    Me

Transfer owned Referrals to:    Me

- Remove future events for the disabled user.
  - **Note:** We suggest deleting all future events. If future events are not deleted, the future events will only be displayed in the Events section of the Overview page for that user's manager and administrator. To remove these events, the user will need to be reactivated, then disabled again, selecting to remove future events.
- Click *Disable User* to make any indicated ownership changes, adding the user to the list of inactive users. Clicking *Cancel* will return to the Active Users list.

## Timing around Disabling Users

If the new user that is replacing the disabled user is not yet in PlayMaker, we suggest not making any changes to ownership of Contacts/Accounts/Referrals so that they are still easy to find by searching on the Owners field in the appropriate view.

***Important Note:*** We do not suggest ever deleting users, or overwriting current user information to replace a user. Please disable the old user, and add a new user. This maintains a history of the prior user, and causes less conflicts over time.