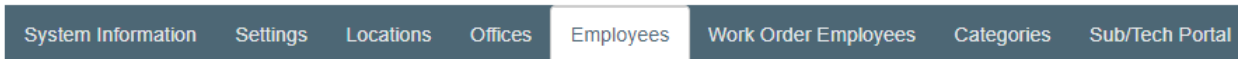


Employee Record – Steps to Inactivate


The instructions below are only recommendations on how to adjust an Employee record when an Employee is no longer with the Company.

1. Go to Settings → System Setup → Employees
2. Click on the Full Name of the Employee to adjust the record, the page will redirect to the Employee detail page.




Employees for All Locations / Offices

Save Grid Preferences? (uncheck for defaults)

 x

Status: Active ▼

Emp ID	Full Name	Title	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
SR - Job Coord	John Smith		
SR - Inventory	John Smith		
SR - Support	John Smith	Department Manager	john@company.com
SR - Work	John Smith		john@company.com
SR - JOB COORD	Job Coordinator		email@email.com
SR - Support	John Smith		john@company.com
SR - Inventory	John Smith		john@company.com
SR - Work	John Smith	Admin	john@company.com

3. Remove the employee's email address
4. Remove the employee's username
5. Uncheck allow RM.Net access
6. Uncheck allow RM.Mobile access
7. Use your Ctrl key to remove any Offices selected to Log into
8. Use your Ctrl key to remove any Locations selected to auto logon
9. Use your Ctrl key to remove any Offices selected to auto logon
10. Change the Status from Active to Inactive
11. Click the save icon ()

Employee Record – Steps to Inactivate

Recommendation Steps (3-11)

Employee | Personal Information | Permissions | Reports Permissions | Certifications

Employee ID: SR - Lead Tech On Call

First: Lead MI Last: Tech

Status: Inactive **10**

Title/Position: Estimator Initials: TECH

Address: Enter a location

City: State: Zip:

Country: Phone: +1 (US) Phone Number Ext. Type... More Phones

3 Email Address

SMS/Text: +1 (US) Phone Number

LOGIN SETUP

4 Username Password

Strength: No Password Entered

5 Allow RM.Net access Allow RM.Mobile access **6**

Login Type: User Dashboard View: Production

Token **11**

Updated By Dawn Bryant on 12/7/2021 2:58:31 PM

Notes

Employee record secured & inactivated.
[DRB] 12/07/2021 02:57 PM (Central Standard)



Estimator*

House Account
AR / AP
Dawn Bryant
Job Coordinator
Training - Email Sync

Home Office

[Home Office Not Selected]

7 Offices available in/log into*

Utah - Lehi Restoration
Illinois - MidWest Construction
Colorado - Restoration Manager
Florida - Sunshine Restoration

8 Auto Logon to these locations*

Colorado
Florida
Illinois
Utah

9 Auto Logon to these offices*

Utah - Lehi Restoration
Illinois - MidWest Construction
Colorado - Restoration Manager
Florida - Sunshine Restoration

*Ctrl-Click to select multiple items in the list

Example of how the inactive Employee record will display on the Job.

Detail | Job Contacts (1) | Additional Contacts (2) | Losses (1) | Schedules | Tasks (23) | Financials** | Correspondence (12) | Documents

General

Company: Oceanside Insurance

Company Contact: Company Billing Contact:

#: 21-0512-WTR Red Flag Billing and Collections Notes

Job Name: Auto generated Custom Job Name *Default is Primary Job Contact

Name

Claim #: 0217-587941

Address: 503 1st St N Year Built:

Building: Unit:

City: Jacksonville Beach State: FL Zip: 32250

Country: County: County

Employee

Project Manager: Brandon Renne

Estimator: Dawn Bryant

Lead Tech: Lead Tech (Inactive)

Marketing Rep: House Account

Job Coordinator: Job Coordinator

Accounting: AR / AP

Email Sync: Training - Email Sync