Do not lose customers when a salesperson leaves your organisation

When a salesperson leaves your organisation, make sure all their contacts know who to talk to, and that no activities are left undone. In just a few minutes, you can protect the critical business data owned by the person who is leaving, reassign all data and activities to other employees, and send a personal e-mail to each contact letting them know who their new salesperson will be.

You don't need a system administrator: Sales Managers can make these changes

These transition tasks can be done by a user with the Sales Manager or Vice President of Sales default security roles, or by a person with the System Administrator security role.

Secure your business data

This article assumes that a salesperson named Henrik Jensen has left your organization. When Henrik leaves, you should deactivate his user record in Microsoft Dynamics CRM 3.0 so that he no longer can access the data. This also prevents other people from assigning him any records or activities.

1. In the Navigation Pane, click **Settings**. In the **Settings** area, click **Business Unit Settings**, and then click **Users**.
2. Find and open the user record for Henrik Jensen.
3. On the **Actions** menu, click **Disable**, and then click **OK**.

Reassign the work to one person

If Henrik's work will all be handled by one employee, while you're in Henrik's user record, you can reassign all his records at once.

1. On the **Actions** menu, click **Reassign Records**, and then click **Assign to another user**.
2. Click the **Lookup** icon, type a part of the other employee's name, and click **Find**.
3. In the results list, double-click the employee's name, and then click **OK**.

This will reassign every record in Microsoft CRM that is owned by Henrik to the other employee. You'll still need to do a little more work on appointments, as Henrik might be scheduled as the organizer, or as a required or optional attendee to appointments he did not own.

Reassign the work to multiple people

Sometimes transitions are more complicated than a one-to-one assignment, and you need to divide a salesperson's responsibilities among two or more people. In the following example, Henrik is responsible for sales in both Washington and Oregon, and you want Gail Erickson to own everything associated with Washington contacts and customers, and Shiraz Cupala to own everything associated with Oregon contacts and customers.

First, identify which record types have records that need to be reassigned. Typically, salespeople are responsible for contacts, leads, opportunities, accounts, tasks, phone-calls, faxes, letters, e-mail messages, and appointments. They might also own quotes, orders, and invoices.

For accounts, contacts, leads, quotes, orders and invoices, you can identify records owned by Henrik where the person or company resides in a specific state. You'll have to specify the search a little differently for opportunities and activities, because address information is not stored in these records.

Reassign accounts, **contacts**, **leads**, **quotes**, **order and invoices**

1. On the **Tools** menu, click **Advanced Find**.
2. In the **Look for** box, select a record type: **Accounts**, **Contacts**, **Leads**, **Quotes**, **Orders** or **Invoices**.
3. Click **Select**, and in the Fields section of the drop-down list, select the **Owner** attribute.
4. Click the operator (by default this will be **Equals current user**), and then select **Equals**.
5. Click **Enter Value** and then click the **Lookup** icon. Type **Henrik**, click **Find**, double-click **Henrik Jensen**, and then click **OK**.
6. Click **Select**, and then select one of the following:
   - For accounts and contacts, select the **Address 1: State / Province** attribute.
   - For invoices, select the **Bill To State / Province** attribute.
   - For Leads, select the **State / Province** attribute.
7. Click **Enter Value**, and then type **Washington**.
8. Click **Find**.
9. Click the check box at the top of the list that selects all records, and then click the **Assign** icon on the toolbar.
10. Click **Assign to another user**, click the **Lookup** icon, double-click **Gail Erickson**, and then click **OK**.
11. Repeat the search for records in Oregon, and assign them to Shiraz Cupala.
12. Repeat steps 2-11 until accounts, contacts, leads, quotes, orders, and invoices are all reassigned.

Reassign Opportunities

Next, reassign opportunities. You must specify opportunities that are based on a lead from the specified state, because addresses aren't stored in opportunities.

1. On the **Tools** menu, click **Advanced Find**.
2. In the **Look for** box, select **Opportunities**.
3. Click **Select**, and then select the **Owner** attribute.
4. Click the operator (by default this will be **Equals current user**), and then select **Equals**.
5. Click **Enter Value** and then click the Lookup icon. Type **Henrik**, click **Find**, double-click **Henrik Jensen**, and then click **OK**.
6. Click **Select**, and in the **Related** section of the drop-down list, select the **Originating Lead** attribute.
7. Click **Select**, and select the **State / Province** attribute.

8. Click **Enter Value**, and then type **Washington**.
9. Click **Find**.
10. Click the check box at the top of the list that selects all records, and then click the **Assign** icon on the toolbar.
11. Click **Assign to another user**, click the Lookup icon, double-click **Gail Erickson**, and then click **OK**.
12. Repeat the search for records in Oregon, and assign them to Shiraz Cupala.

Reassign any open or scheduled activities

Next, reassign any open or scheduled activities. Unfortunately, you can't see the state in the Advanced Find search results, so you'll need to open each activity to determine which person to assign it to.

1. On the **Tools** menu, click **Advanced Find**.
2. In the **Look for** box, select **Activities**.
3. Click **Select**, and then select the **Owner** attribute.
4. Click the operator (by default this will be **Equals current user**), and then select **Equals**.
5. Click **Enter Value** and then click the Lookup icon. Type **Henrik**, click **Find**, double-click **Henrik Jensen**, and then click **OK**.
6. Click **Select**, and then select the **Activity Status** attribute.
7. Click **Enter Value**, double-click **Open**, double-click **Scheduled**, and then click **OK**.
8. Click **Edit Columns**, and under **Common Tasks**, click **Add Columns**, select **Due Dat**e, **Regarding**, and **Start Date**, and then click **OK**. While you're here, you may want to adjust the width of the columns so that all fit on the screen. To adjust the width, select a column, click **Change Properties**, select a width, and then click **OK**.
9. In the **Edit Columns** dialog box, click **OK**.
10. Click **Find**.
11. You'll need to look at each scheduled or open activity, and decide who to assign it to. Click the link in the **Regarding** column to see what the activity is about. You may have to click another link in the record that comes up to determine which state the activity is related to, and, therefore, who to assign the record to.
12. Select each record, and then on the toolbar, click the **Assign** icon.
13. Click the **Lookup** icon, find the user, and then click **OK** twice.

Look for additional appointments

The last assignment task is to look for appointments where Henrik is not the owner, but is listed as the organizer, or as a required or optional attendee. To find all appointments where Henrik has one of these roles:

1. On the **Tools** menu, click **Advanced Find**.
2. In the **Look for** box, select **Appointments**.
3. Click **Select**, and in the **Related** section, select **Activity Parties**.
4. Click **Select**, and select **Party**.
5. Select **Equals Current User**, and then select **Equals**.
6. Click **Enter Value**, and select Henrik.
7. Click **Find**.

8. Open each appointment, and look both on the **Appointment** and **Details** tabs to see whether Henrik is required, optional, or the organizer of the appointment, and change the data as required.

Communicate the transition

Both Gail and Shiraz can easily send e-mail to all their newly assigned contacts – or the manager or system administrator who assigns the contacts could send the mail.

There are two basic steps: creating an e-mail template for notifying contacts about changes, and then selecting and notifying the users. Gail and Shiraz can create their own e-mail templates, or the Sales Manager or System Administrator can create one template for both of them to use.

Prepare an e-mail template

First, prepare an e-mail template with the message to send to the contacts:

1. Click **Settings**, and then click **Templates**.
2. Click **E-mail Templates**, and then click **New**.
3. In **Template Type**, click **Contact**, and then click **OK**.
4. In the **Title** box, type something like "Notify Contacts about New Account Manager". This information will be used by you to select the correct contacts, but is never seen by customers.
5. In the **Subject** box, type the subject line of the e-mail that will go to customers. For example, you could enter "I'm your new sales representative at Adventure Works Cycle".
6. In the body, type and format the text of the e-mail message you want to send. You can insert fields from the Contact record. For example, to start your message with Dear *contact_first_name*:
    1. After you type Dear, click **Insert/Update**, and then click **Add**.
    2. In **Record Type**, select **Contact**.
    3. In **Field**, select **First Name**, and then click **OK**.
7. If this template will be used by multiple users, make sure the signature inserts the name of the user who's using the template. For example, you could select the Full Name and Job Title of the user from **Insert/Update**. The result will look like this in the file:
```
{!User: Full Name;User : Job Title;}
```
8. When you're satisfied with your text and formatting, click **Save and Close**.

Send e-mail to reassigned contacts

Now you're ready to send e-mail to the reassigned contacts:

1. On the Contacts page, use Advanced Find to find all the records just assigned:
    1. Click **New**.
    2. Click **Select**, and then select **Modified By**.
    3. Click **Equals current user**, and then select **Equals**.
    4. Click **Enter Value**, click the Lookup icon, select the name of the user who assigned the records, and then click **OK**.
    5. Click **Select**, and then select **Modified On**.
    6. Click **Enter Value**, click the calendar control, and then select **Today**.
    7. Click **Select**, and then select **Owner**.
    8. Click **Equals current user**, and then select **Equals**.
    9. Click **Enter Value**, click the Lookup icon, select the new owner, and then click **OK**.
    10. Click **Find**.

2. Click the **Select All** check box.
3. Click the **Send Direct E-mail** icon on the toolbar.
4. In the **Send Direct E-mail** form, select the new template you just created.
    1. In the **Send direct e-mail to:** section, select "Selected records on current page."
    2. In the **Send direct e-mail from:** section, click the Lookup icon, select your name, and then click **OK**.
    3. Click **Send**.

Your customers now know who to contact, and all work items are reassigned so that you don't lose business during the transition.