

Clearing A User's Calendar

While individual events and series of events can be deleted manually, the calendar does not have a mass delete option available, so the assistance of an administrator will be required. This can be a time consuming process when a user would like to clear their calendar of all events. The following circumstances are generally the primary reasons that users may want to clear off their calendar:

- When a user changes sales territories and starts to service new accounts and contacts.
- When a new user is added, but their profile has overwritten a previous user, transitioning the old user's calendar to the new user.

Note: From time to time, new users are added by overwriting existing users, instead of disabling the old user and adding a new user. When users are added to PlayMaker, we suggest that they are added as New Users, rather than overwriting an older user. There are two primary reasons for this:

- **Historical Record Association:** Records that were assigned to the old user become associated to the new user, replacing all historic ownership. The same is true for any call or visit notes. This makes tracking down an actual note taker a difficult task and puts into question who was assigned which referral.
- **Reporting Accuracy:** While the new user may have just been updated on the user profile, they will have historic data in the YTD reporting and for previous years. At the end of the year, reviewing user productivity will be a challenge since their contribution will be seen as the same person, rather than breaking out who did what.

The suggested resolution to correct both the old user and the new user would be as follows:

1. Have an administrator change the first name, last name and email address of the current user account in question user back to the original user, including email address.
2. [Create a new user](#) with the new user's information, if a user license is available (if a license

is not available, but accounts and contacts should be transferred to the new user, please see [this article](#) for a workaround).

3. Disable the old user, transferring account and contact ownership to the newly created user, leaving referrals assigned to the original user.

This will assign the new user all of the correct accounts and contacts, as well as provide a blank calendar. It will also ensure that historical records display properly in reporting.

For users that just want to clear their calendar to start over, or are transferring to a new sales territory, this is an alternate resolution to clear the calendar for current active users:

1. Have an administrator disable your user account, choosing to delete future events during the disable process.

2. After your account has been disabled, have your administrator reactivate your account.

3. When logging back in, accounts and contacts will still be assigned to you, but the calendar will be blank moving forward.

- Note that this method will not create accurate reporting for YTD activity, since multiple users will have shared the same profile.