Retiring a User / Company them from the project instance. Associated contact information will be retained meaning a user / Company may be reinstated at a later date if required.

1. On the Project Toolbar, click **Contacts.**

2. Search by **Company** or **Role**. Once located, click the contact **Display Name**.

The **Contact Detail** screen is displayed.

3. Click **Retire**.

4. From the Retire User screen, complete the following fields:
   a. Select one of the three options from the **Please select an option to proceed dropdown:**
      • Retire from only this project
      • Retire from all projects where the current [XXX] project was the template
      • Retire from all projects where I am an Admin
   b. **Change The Ownership** = **Yes**
   c. Select the **Company** from the dropdown
   d. Select the new user from the list
   e. Click **OK**
   f. **Remove User from Groups** = **Yes**
5. Click **Retire User.**