How to Activate/Deactivate a Salesperson

Check/Unchecked Active button

You can use the Active button to activate or deactivate a salesperson record.

1. Open the Salesperson record. Refer to How to Open Salesperson record.
2. Navigate to **Salesperson tab**.
3. Check the **Active check box** button if the Salesperson is still active, and unchecked it if not. Note that inactive salespersons will not be displayed on any salesperson related combo list box.

Entity - Jared Smith								
New Save Search Refresh Delete Undo Additional Close								

Entity	General	Salesperson	Comments (0)	Attachments (1)	Messages	Custom	A

Type: Driver

Date Hired: 6/14/2004

Birth Date: 1/2/1978

Gender: Male

Territory   OH

Marital Status: Single

Spouse:

Active: ☐

Employment History

Terminated:

Reason:

Delete Record

Deleting a salesperson record that is already used by another screen/table will automatically deactivate.

1. Open the Salesperson record. Refer to How to Open Salesperson record.
2. Click the **Delete** button.

Entity - Jared Smith							
New Save Search Refresh **Delete** Undo Additional ▾ Close							

Entity	Salesperson	Comments (0)	Attachments (0)	Custom	Audit Log (4)

3. Click **Yes** on the confirmation message.

iRely i21

Are you sure you want to delete this record?

Yes   No

4. If the record is not being used in another part of i21, it will be deleted. Else, below message will be displayed and the record will get deactivated.

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The record you are trying to delete is being used. The entity has been set to inactive.

OK

Check/Unchecked Active button

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

Delete Record

1. Open the Salesperson record. Refer to How to Open Salesperson record.
2. Click the **Delete** toolbar button.

3. Click **Yes** on the confirmation message.

4. If the record is not being used in another part of i21, it will be deleted. Else, below message will be displayed and the record will get deactivated.

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3. Check the **Active check box** button if the Salesperson is still active, and unchecked it if not. Note that inactive salespersons will not be displayed on any salesperson related combo list box.