

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

EntityGeneralSalespersonComments (0)Attachments (1)MessagesCustomA

Type:Driver

Date Hired:6/14/2004

Birth Date:1/2/1978

Gender:Male

TerritoryOH

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 AdditionalClose

EntitySalespersonComments (0)Attachments (0)CustomAudit 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.



iRely i21

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

OK

Check/Unchecked Active button

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.

The screenshot shows the 'Entity - Jared Smith' form with the 'Salesperson' tab selected. The form contains the following fields:

- Type: Sales Representative
- Date Hired: 06/14/2004
- Birth Date: 01/02/1978
- Gender: Male
- Territory: (empty)
- Marital Status: Single
- Spouse: (empty)
- Active: ☐ (highlighted with a red box)

Below the 'Active' checkbox are sections for 'Employment History' (Terminated, Reason) and 'Commission Details' (Commission: Subtotal, Percent: 5.50%).

Delete Record

1. Open the Salesperson record. Refer to [How to Open Salesperson record](#).
2. Click the **Delete** toolbar button.

The screenshot shows the 'Entity - Jared Smith' form with the 'Delete' button in the toolbar highlighted with a red box. The toolbar includes buttons for New, Save, Search, Refresh, Delete, Undo, Additional, and Close. Below the toolbar are tabs for Entity, Salesperson, Notes, Attachments, Custom, and Audit Log.

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

The screenshot shows a confirmation dialog box titled 'iRely i21' with the question 'Are you sure you want to delete this record?'. The 'Yes' button is highlighted with a red box.

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.

The screenshot shows an error dialog box titled 'iRely i21' with the message 'The record you are trying to delete is being used. The entity has been set to inactive'. The 'OK' button is at the bottom.


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 - Inactive



New Save Search Refresh Undo Additional Close


Entity Salesperson Notes Attachments

Date Hired: 

Birth Date: 

Gender: 


Territory:  

Marital Status: 

Spouse:

Active: ☒

Employment History

Terminated: 

Dispatch

Notification:

Message: