

How to set Quote Status to Expired

Expired status signifies a quote that is no longer valid, but was neither accepted or rejected in the time frame allotted. If removed from this status, a new quote is created with the information from the previous quote.

1. Open the Quote record.
2. Enter the **Expiration** date.
3. Set the **Status** to **Expired**.
4. Click **Close button**.
5. Click **Yes** on the confirmation message.



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Do you want to save the changes you made?

Yes

No

Cancel

Reopen this expired Quote. Notice that the Status field is still enabled which allows you to select another status. Changing the status of an expired Quote to any other status will give you the option to duplicate the original Quote.



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You cannot change the status of an expired Quote. Do you want to create a duplicate record?

Yes

No



Quote automatically gets expired when the Expiration date has passed.

Expired status signifies a quote that is no longer valid, but was neither accepted or rejected in the time frame allotted. If removed from this status, a new quote is created with the information from the previous quote.

1. Open the Quote record, then set the **Status** to **Expired**.
2. Click **Close button**.

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



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Do you want to save the changes you made?

Yes

No

Cancel

Try to reopen this expired Quote. Notice that the Status field is still enabled which allows you to select another status. Changing the status of an expired Quote to any other status will give you the option to duplicate the original Quote.



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You cannot change the status of an expired Quote. Do you want to create a duplicate record?

Yes

No



Quote automatically gets expired when the Due date has passed.