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Expired status signifies a quote that is no longer valid, but was neither accepted or rejected in the time frame allotted.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.





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.





Expired status signifies a quote that is no longer valid, but was neither accepted or rejected in the time frame allotted.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?



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.

