

## Elapsed Document Overview Transcript

Quotes, reservations, call off orders and templates have expiry dates.

When these documents are beyond that date and have not been accepted or rejected, converted to sales orders or completely called off, they become elapsed documents.

Best Practice is to periodically remove elapsed documents from your system.

Doing so makes searching for information faster and easier.

In this course, you will learn how to find elapsed documents and how to select them for removal.

### Find Elapsed Documents

The option to Remove Elapsed Documents is found on the Tools tab.

It is the first option in the Maintenance group.

There are 4 tabs on the Remove Elapsed Documents window - Quotes, Reservations, Call Off Orders, and Templates.

Beside the tab name is the number of elapsed documents in each list.

By default, the Quotes tab is selected with all open, saved and parked quotes beyond their expiration.

When there are many documents, you might choose to sort the list or group them by a column.

Dragging and dropping the Status column into the Group by area arranges the elapsed quotes into three groups.

You can then expand the list to view the records in smaller batches.

You might also choose to sort the list by any of the columns in ascending order on either Date Required or Created.

Organizing using either option can help with the next step to remove documents no longer needed.

### Select and Remove Documents

Before selecting Quotes to remove, choose a Reason from the drop down list.

This list is the same as when selecting a reason to reject a quote.

Now highlight a document.

You can select multiple documents by using the Ctrl and click or Shift and click key and mouse combination.

In this example, we'll choose the entire list of Parked quotes by clicking the first quote in the list and then Shift and click on the last.

To remove any from the list you selected, use Ctrl and click.

When the list is set, press Remove Quotes.

Confirm that you want to remove the documents.

BisTrack updates the list accordingly.

Two additional buttons are available for choosing the documents to remove.

Select All highlights every document for the current tab. This is a fast way to have every expired document chosen at one time.

Deselect All turns the highlight off of all documents that were previously chosen.

The steps to removing Reservations, Call Off Orders, and Templates are the same as Quotes except a Reason code is not required.

Call Off Orders, must be marked as complete prior to removing.

When finished, Close the window.

Routine maintenance to remove expired quotes, reservations, call off orders, and templates eliminates clutter when using Find Documents.

It should be easy for you to now find elapsed documents and select them for removal.

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