

Expired Process

07/07/2026 4:18 pm EDT

Purpose

Ensure all departments complete the required actions when a customer contract has expired to prevent unnecessary billing and maintain accurate system records.

Billing

1. Review the Expired notification.
2. Do not bill the customer's RMR after the contract expiration date.
3. Verify no future invoices will generate for the expired contract.
4. Document the billing action taken.

Operations

1. Down-sell the contract or quote in Salesforce.
2. Remove the software from Salesforce if the customer is no longer using the full platform.
3. Confirm Salesforce reflects the customer's expired contract status.

Professional Services

1. Cancel any open project associated with the expired contract.
2. Update the project status to Cancelled.
3. Confirm no additional work is scheduled.

Completion checklist

1. Confirm RMR billing has stopped.
2. Confirm the Salesforce contract or quote has been down-sold.
3. Confirm software has been removed from Salesforce, if applicable.
4. Confirm all open Professional Services projects have been cancelled.
5. Confirm all applicable notes have been added before closing the request.

This process ensures expired contracts are properly closed, billing is discontinued, and Salesforce and project records remain accurate.
