

Create Contract

Client Organization Contract

* Client Organization

8_8_18 Reg Org

☐

No Expiration Date

* Start Date

12/05/2018

* Real End Date

* Original End Date

* Contract Type

* Revenue Item

Description

* Contract Value

Terms

* Max Units

☐

Unlimited

* Incentive Units

* Unit Cost Per Consultation

1

* Unit Cost Per Teleconference

1

☒

* Unit Cost Per Regional Group Meeting

1

☒

* Unit Cost Per Conference Group Event

1

☒

* Unit Cost Per Group Guided Exhibit Event

1.5

☒

* Unit Cost Per Private One-On-One Meeting

2

☒

* Unit Cost Per Traditional US or Ex-US Survey
(up to 25 respondents)

0

☒ TBD

* Unit Cost Per Quick Poll
(up to 5 questions and up to 25 respondents)

2.5

No Show Charge

GUIDEPOINT. CRM

Welcome Rajesh lātin charāctērs (edit profile)
Generalist
v2.0.5431 Updated Jun 14, 2019 (release notes)

Go to Advisor

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Accounting

Organization List

Client List

Contract List

Create Organization

Create Client

Create Contract

Bill Client

Create Contract

Client Organization Contract

* Client Organization

8_8_18 Reg Org

☐

No Expiration Date

* Start Date

12/05/2018

* Real End Date

30/11/2019

* Original End Date

30/11/2019

* Contract Type

* Revenue Item

Description

* Contract Value

Terms

* Max Units

☐

Unlimited

* Incentive Units

* Unit Cost Per Consultation

1

* Unit Cost Per Teleconference

1

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* Start Date

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30/11/2019

* Original End Date

30/11/2019

* Contract Type

MSA

* Revenue Item

Data

Description

* Contract Value

1

* Annual Contract Value

0.40

Terms

* Max Units

4

☐

Unlimited

* Incentive Units

1

* Unit Cost Per Consultation

1

* Unit Cost Per Teleconference

1

☒

* Unit Cost Per Regional Group Meeting

1

☒

* Unit Cost Per Conference Group Event

1

☒

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1.5

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0

☒ TBD

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(up to 5 questions and up to 25 respondents)

2.5

* Unit Overage Charge

1

No Show Charge

* Contract Type

MSA

* Revenue Item

Data

Description

* Contract Value

1

* Annual Contract Value

0.40

* Contract Value Currency

US Dollars

Soft Dollar Broker

☐ Auto Renewal

☐ Active

Upsell Amount

Network

Survey

Tracker

* Contract Type

MSA

* Revenue Item

Data

Description

* Contract Value

1

* Annual Contract Value

0.40

* Contract Value Currency

US Dollars

Soft Dollar Broker

☐ Auto Renewal

☒ Active

Upsell Amount

Network

Survey

Tracker

* Unit Cost Per Regional Group Meeting

1

☒

* Unit Cost Per Conference Group Event

1

☒

* Unit Cost Per Group Guided Exhibit Event

1.5

☒

* Unit Cost Per Private One-On-One Meeting

2

☒

* Unit Cost Per Traditional US or Ex-US Survey (up to 25 respondents)

0

☒ TBD

* Unit Cost Per Quick Poll (up to 5 questions and up to 25 respondents)

2.5

* Unit Overage Charge

1

* Units Rolled Over from Previous Contract

* Value Per Rollover Unit

2

Notes

Notify on Create Contract

a a - (N/A)

a aa - (N/A)

a reg - (N/A)

Adam Levin - (N/A)

adas asdas - (N/A)

AdminRole EmpOne - (N/A)

Agnes Lee - (N/A)

Akaash Patel - (N/A)

Alshabha D. - (N/A)

* Unit Cost Per Regional Group Meeting

1

☒

* Unit Cost Per Conference Group Event

1

☒

* Unit Cost Per Group Guided Exhibit Event

1.5

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* Value Per Rollover Unit

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Alshabha D. - (N/A)

Pavment Terms (Net)