

GUIDEPOINT. CRM

Welcome Rajesh látin charúctërs (edit profile)  
Generalist  
v2.0.5429 Updated Jun 14, 2018 (release notes)

Go to Advisor

Logout

HomeRequestsClientsAdvisorsCompaniesEventsSurveysComplianceInvoicesEmailsEmployeesReportsAdminAccounting

Organization ListClient ListContract ListCreate OrganizationCreate ClientCreate ContractBill Client

Create Client Form

Email

I234567@valuegreatszxcxzaq.dfass

Client Referred By (Employee name):

Relationship Overview :

Proceed with Client Creation

PORTAL\_ENV\_MODE: test16

GUIDEPOINT. CRM

Welcome Rajesh látin charúctërs (edit profile)  
Generalist  
v2.0.5429 Updated Jun 14, 2018 (release notes)

Go to Advisor

Logout

HomeRequestsClientsAdvisorsCompaniesEventsSurveysComplianceInvoicesEmailsEmployeesReportsAdminAccounting

Organization ListClient ListContract ListCreate OrganizationCreate ClientCreate ContractBill Client

Create New Client

Personal

Prefix

Mr.

\* First Name

Awesome

MI

\* Last Name

Suffix

Signature

Characters Remaining 2000

is Anonymous Client

Phone ext:

Alternate Phone ext:

Cell Phone

Fax

Email

testmnacvc1234567@valuegreatszxcxzaq.dfass

Alternate Email

\* Password

eneyet91

Add Client

Address

Address

City

State (Required for United States)

Postal Code

\* Country

\* Time Zone

--- Please Select ---

Organization

\* Organization

\* Title

SectorProject Manager

Note: Leaving Sector Blank results in assignment of "Generalist" Sector

 Add PM

Event Invitations

Sector/Subsector	Events	Teleconferences
	<input checked="" type="checkbox"/> (Yes to all)	<input checked="" type="checkbox"/> (Yes to all)

Personal

Prefix

Mr.

\* First Name

Awesome

MI

\* Last Name

India

Suffix

Signature

Characters Remaining 2000

is Anonymous Client

Phone ext:

Alternate Phone ext:

Cell Phone

Fax

Email

testmnacvc1234567@valuegreatszxcxzaq.dfass

Alternate Email

\* Password

eneyet91

Add Client

Address

Address

City

State (Required for United States)

Postal Code

\* Country

\* Time Zone

--- Please Select ---

Organization

\* Organization

\* Title

SectorProject Manager

Note: Leaving Sector Blank results in assignment of "Generalist" Sector

 Add PM

Event Invitations

Sector/Subsector	Events	Teleconferences
	<input checked="" type="checkbox"/> (Yes to all)	<input checked="" type="checkbox"/> (Yes to all)

Sector/Subsector	Events	Teleconferences
	<input checked="" type="checkbox"/> (Yes to all)	<input checked="" type="checkbox"/> (Yes to all)