Contents

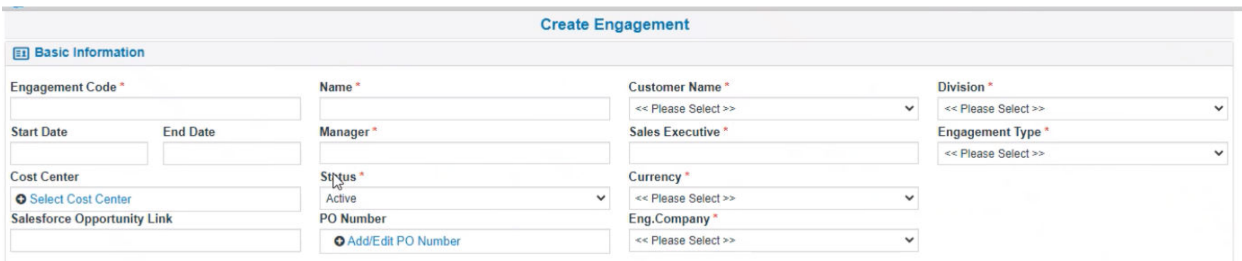
Create Engagement

In this screen we can create the new engagements and linking those engagements with the customers and those projects can be done here.

1. Create Screen

1a. Basic Information

Here we need to add the basic details related to the engagement and need to select the customer to whom the engagement needs to be mapped with.

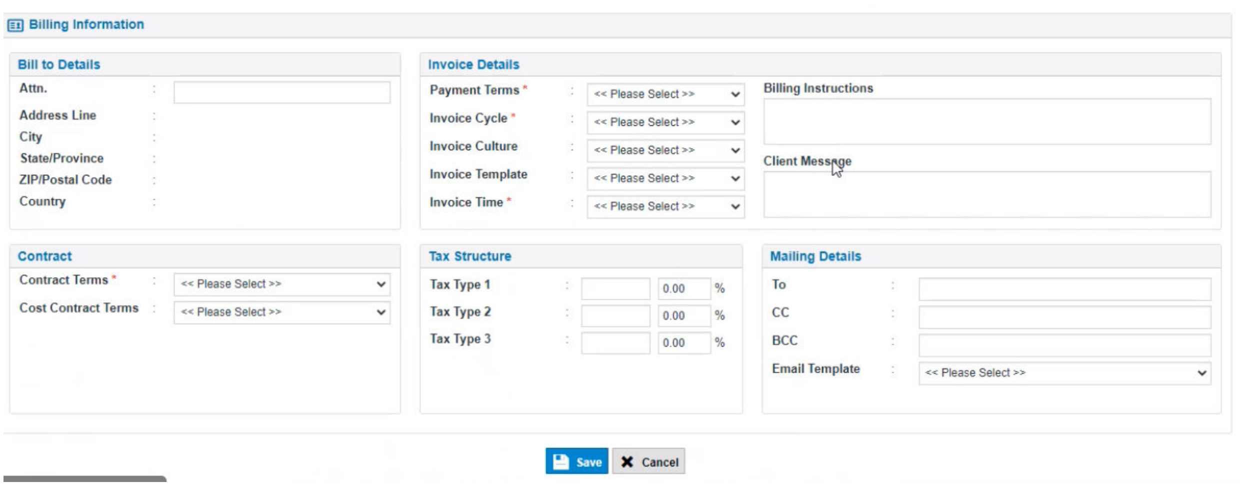


1b. Industry and capability compliance

Here need to add the industry solution we are looking for and can add the value that solution add to the customer.

1c. Billing Information

Here we need to add all the data required for billing and to whom the data needs to send on the Rate on which the data need to send to the customer can also be added over.



Billing Information

Bill to Details

Attn. :

Address Line :

City :

State/Province :

ZIP/Postal Code :

Country :

Invoice Details

Payment Terms * : << Please Select >>

Invoice Cycle * : << Please Select >>

Invoice Culture : << Please Select >>

Invoice Template : << Please Select >>

Invoice Time * : << Please Select >>

Billing Instructions

Client Message

Contract

Contract Terms * : << Please Select >>

Cost Contract Terms : << Please Select >>

Tax Structure

Tax Type 1 : 0.00 %

Tax Type 2 : 0.00 %

Tax Type 3 : 0.00 %

Mailing Details

To :

CC :

BCC :

Email Template : << Please Select >>

Save Cancel