

Contract Expiration

Last Modified on 06/29/2026 11:29 am PDT

Pathway: Sales > Contract Expiration

Contract Expiration is a loss prevention tool used by sales to monitor customer contract expiration dates. The Contract Expiration screen is divided into two grids; the top grid displays a summary of contract revenue by sales representative and the bottom grid displays a detailed breakdown of a selected revenue amount.

DIVISION	LOB	MONTHLY REVENUE	UNDER CONTRACT	EXPIRING NEXT 90 DAYS	EXPIRED / NO CONTRACT
Services	Front End Load, Front Load Recycle				
Carren Santiago		\$ 10,477.00	\$ 2,000.00	\$ 0.00	\$ 10,200.00
Homer Simpson		\$ 97.00	\$ 0.00	\$ 0.00	\$ 97.00
		\$ 1,300.00	\$ 0.00	\$ 0.00	\$ 1,300.00
		\$ 1,100.00	\$ 0.00	\$ 0.00	\$ 1,100.00
		\$ 4,466.00	\$ 0.00	\$ 0.00	\$ 4,466.00
		\$ 155.00	\$ 0.00	\$ 0.00	\$ 155.00
		\$ 270.00	\$ 0.00	\$ 0.00	\$ 270.00
		\$ 4,173.46	\$ 1,310.00	\$ 0.00	\$ 4,083.46
		\$ 736.52	\$ 0.00	\$ 0.00	\$ 736.52
		\$ 5,271.00	\$ 0.00	\$ 0.00	\$ 5,271.00
		\$ 285.00	\$ 0.00	\$ 0.00	\$ 285.00
Total		\$ 20,870.45	\$ 3,310.00	\$ 0.00	\$ 20,195.45

SITE ID	EXT ID	TYPE	STATUS	NAME	CITY	MONTHLY REV.	TERM	EXPIRATION DATE	RENEWAL	SALES REP	VENDOR
10172			Active	SEABURY-Khan CO	Seawata	\$ 605.00	60	06/18/2024		Carren Santiago	
2993055			Active	Patrick Star CD&B	Hollywood	\$ 105.00	60	06/07/2026		Carren Santiago	
31278			Active		St. Petersburg	\$ 110.00	60	06/09/2026			
32140001			Active		Largo/Cal Kty	\$ 100.00	60	07/19/2024			
31188			Active		Holmes Beach	\$ 100.00	60	06/15/2027	Auto		
22163004			Active		Bradenton	\$ 60.00	60	08/01/2027			

Filter Fields

Filtering options are available and narrow down what displays on the screen.

Filter	Description
Division	Filters to only display accounts assigned to the selected division.
LOB	Filters to only display accounts assigned to the selected Line of Business.

Field Descriptions

		MONTHLY REVENUE	UNDER CONTRACT	EXPIRING NEXT 90 DAYS	EXPIRED / NO CONTRACT
Carmen SanDiego		\$ 30,477.20	\$ 2,251.00(0)	\$ 0.00(0)	\$ 30,227.20(268)
Homer Simpson		\$ 97.00	\$ 0.00(0)	\$ 0.00(0)	\$ 97.00(1)
		\$ 300.00	\$ 0.00(0)	\$ 0.00(0)	\$ 300.00(1)
		\$ 100.00	\$ 0.00(0)	\$ 0.00(0)	\$ 100.00(1)
		\$ 4,466.80	\$ 0.00(0)	\$ 0.00(0)	\$ 4,466.80(27)
		\$ 555.00	\$ 0.00(0)	\$ 0.00(0)	\$ 555.00(1)
		\$ 270.00	\$ 0.00(0)	\$ 0.00(0)	\$ 270.00(1)
		\$ 4,173.46	\$ 1,150.00(1)	\$ 0.00(0)	\$ 4,063.46(11)
		\$ 236.52	\$ 0.00(0)	\$ 0.00(0)	\$ 236.52(1)
		\$ 5,271.00	\$ 0.00(0)	\$ 0.00(0)	\$ 5,271.00(1)
		\$ 285.00	\$ 0.00(0)	\$ 0.00(0)	\$ 285.00(1)
		\$ 20,870.45	\$ 2,750.00(2)	\$ 0.00(0)	\$ 20,120.45(183)
Total		\$ 67,162.43	\$ 1,090.00(1)	\$ 0.00(0)	\$ 66,072.43(183)

SITE ID	EXT ID	TYPE	STATUS	NAME	CITY	MONTHLY REV.	TERM	EXPIRATION DATE	RENEWAL	SALES REP	VENDOR
1072			Active	KBARRY-KNOW.CO	Sarasota	\$ 605.00	60	06/18/2024		Carmen SanDiego	
2993055			Active	Patrick Star Group	Hollywood	\$ 105.00	60	05/07/2026		Carmen SanDiego	
31278			Active	Reference Construction, LLC	St. Petersburg	\$ 110.00	60	06/09/2026			
32140001			Active	The Pressure at Lombobach	Longboat Key	\$ 105.00	60	07/13/2026			
31188			Active	Moss Builders	Holmes Beach	\$ 105.00	60	04/15/2027	Auto		
22163004			Active	Solid Rock Products	Budersheim	\$ 60.00	60	09/10/2027			



Click on an amount to view a detailed break down of the accounts it includes. Excludes values displayed under the Monthly Revenue column.

Field Descriptions	Descriptions
Monthly Revenue	The SUM of the line item values from the Under Contract, Expiring in 90 Days and Expired/No Contract columns for each sales representative.
Under Contract	The SUM of all accounts under contract for each sales representative.
Expiring Next 90 Days	The SUM of all accounts expiring in the next 90 days for each sales representative.
Expired / No Contract	The SUM of all expired accounts (with no contract) for each sales representative.

View Total Details

Click on a total amount to view a detailed break down of the accounts it includes.

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		\$ 100.00	\$ 0.00(0)	\$ 0.00(0)	\$ 100.00(1)
		\$ 4,466.80	\$ 0.00(0)	\$ 0.00(0)	\$ 4,466.80(27)
		\$ 555.00	\$ 0.00(0)	\$ 0.00(0)	\$ 555.00(1)
		\$ 270.00	\$ 0.00(0)	\$ 0.00(0)	\$ 270.00(1)
		\$ 4,173.46	\$ 1,150.00(1)	\$ 0.00(0)	\$ 4,063.46(11)
		\$ 236.52	\$ 0.00(0)	\$ 0.00(0)	\$ 236.52(1)
		\$ 5,271.00	\$ 0.00(0)	\$ 0.00(0)	\$ 5,271.00(1)
		\$ 285.00	\$ 0.00(0)	\$ 0.00(0)	\$ 285.00(1)
		\$ 20,870.45	\$ 2,750.00(2)	\$ 0.00(0)	\$ 20,120.45(183)
Total		\$ 67,162.43	\$ 1,090.00(1)	\$ 0.00(0)	\$ 66,072.43(183)

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22163004			Active	Solid Rock Products	Budersheim	\$ 60.00	60	09/10/2027			

Field Descriptions	Descriptions
Site ID	The site identification number.
Ext ID	The ID the account is under with their current provider.
Type	DThe type of contract.
Status	The status of the account.
Name	The name of the account.
City	The city the account is located in.
Monthly Rev.	The monthly revenue quoted in the contract.
Term	The Renewal Term identified in the contract.
Expiration	When the contract will expire.
Renewal	The Renewal Term selected in the contract.
Sales Rep	The name of the sales representative who created the contract.
Vendor	The accounts current vendor.
