



Lead Edit New Lead

Save Save & New Cancel

Sales - 1 --- Lead Information

Lead Owner: 600 Kenton Williams
First Name: 56 --None--
Last Name: 67
Middle Initial: 24
Suffix: 47 --None--
Certifications: 36
Title: 00

Marketing Blocked: 22
Email: 51
Phone: 52
Extension Number: 12
Toll-Free Number: 32
Fax: 53
Mobile: 54

Sales - 2 --- Company Information

Company: 48
DBA Name: 09
Year of Founding: 80
Industry: 50
Line Of Business: 31
NCIS: 104
D-U-N-S Number: 10

No. of Employees: 49
Website: 55
EIN: 11
Company State of Incorporation: 79
Business Entity Type: 76
Company Revenue: 77
Revenue Growth %: 78
Company Description: 85

Address Information

Street: 58
City: 58
State/Province: 58
Zip/Postal Code: 58
Country: 58

Sales - 2.5 --- Product Interest

Areas of Interest: 03
Available: HRO, ASO, PEO, HR Consulting, HR Audits, HRC Basic, HRC Deluxe, HRC Premium, Agency, LMS

Sales - 3 --- Who are you -- Lead Type Information

Lead Type: 20
Alliance/Channel Lead Type: 01
Partner Type: 25
Group Life & Health Ins. Renewal Date: 14

Sales - 3.5 --- Lead Source Information

Lead Source: 61
Source Campaign: 29
Referral Alliance - (Contact Record): 46
Referral Alliance (Other): 02

Sales - 4 --- Lead Generation Information --- Lead Status Information

Lead Status: 209
Probability by Consultant (%): 44
Raw Date: 37
Cold Call Date: 38
Engaged Date: 39
Contacted Date: 40
Marketing Ready Lead Date: 41
Sales Ready Lead Date: 42
Appointment Scheduled Date: 43

Sales - 5 --- HR Provider Information

Medical Carriers: 73
Current HR Provider: 07
Medical Provider: 59
Benefits Provider: 04
Workers' Comp Provider: 34
Payroll Provider: 27
Payroll Frequency: 26
Medical Carriers Renewal Date: 74
HR Provider Renewal Date: 16
Medical Renewal Date: 23
Benefits Renewal Date: 05
Workers' Comp Renewal Date: 35
Payroll Renewal Date: 28
Payroll System: 60

Sales - 6 --- Comments

Comments: 75

Marketing - 1 --- Marketing Information

Original Source Type: 45
Source Campaign (Marketo): 30
OneSource Family: 42
HooversId: 15
Birthday: 06
Marketing Checked: 800
Lead Score: 18
Priority: 70
Relative Score Value: 71
Urgency Value: 72
Demoted Record: 604
Demoted Record: 801

Marketing - 2 --- Contact Methods - Email Opt Out

Opt Out - BLOC Parties: 36
Opt Out - Corporate Announcements: 37
Opt Out - Newsletter - HR Advisor: 38
Opt Out - Odyssey's Offerings: 39
OptOut-Podcasts: Business Survival Tips: 40
Opt Out - Webinars: 41
Fax Opt Out: 63
Do Not Call: 64
Email Opt Out: 65

Marketing - 3 --- Social Media

LinkedIn Address: 21
Facebook Address: 13
Twitter Username: 32
Youtube: 36

Marketing - 4 --- Web Form Comments

Web Form Comments: 33

Optional

Assign using active assignment rule

KEY:
Help for this Page
= Does "Not Map" A/C or O
= Mirrored from the Account level
R = (RFP)
Client Manager
H = HOOVERS