



Account Edit  
New Account

Account Edit  
Sales - 1 and 2 # Required Information Lead Information

Account Owner **601** Kenton Williams

Account Name **48**

DBA Name **09**

Year of Founding **80**  i.e.: 1994 **R**

Parent Account **207**  Account (only) look up

Industry **50** --None--  
Advertising & Marketing, Agriculture, Apparel, Biotechnology, Chemicals, Communications, Construction, Education, Electronics, Energy, Entertainment, Environmental, Financial Services, Food & Beverage, Government, Health Care Services, Hospitality, Information Technology, Machinery, Manufacturing, Media, Medical Laboratories & Imaging Centers, Medical Practice Management & Services, Not-For-Profit, Professional Services, Recreation, Retail, Shipping, Transportation, Utilities, Other

Line Of Business **31** --None--  
Financial Services --None-- Accounting Firms, Bankers, Insurance Agencies, Other  
 Health Care Services --None-- Clinics, Dentist, Hospitals, Physician Practices, Surgery Centers, Other  
 Information Technology --None-- Hardware, Networking, Software, Voice/Data, Other  
 Not-For-Profit --None-- org, Charities, Churches, Foundations, Medical Research, Trusts, University, Other  
 Professional Services --None-- Architects, Attorneys, Consulting, Engineers, Other

SIC Code **103**

NCIS **104**

D-U-N-S Number **10**

Phone **62**

Toll-Free Number **31**

Fax **53**

No. of Employees **49**

Website **55**

EIN **11**  Federal ID Number also known as Employer Identification Number (EIN)

Company State of Incorporation **79** --None--  
Al, AK, All 50 Stats

Business Entity Type **76** C Corporation  
S Corporation  
 Limited Liability Company (LLC)  
 Limited Partnership (LP)  
 Limited Liability Partnership (LLP)  
 Professional Corporation or PLLC  
 Nonprofit Corporation  
 Sole Proprietorship

Company Revenue **77**

Revenue Growth % **78**

Company Description **85**

Sales 2.3 --- Address Information

Street **58**  **58**

City **58**  **58**

State/Province **58**  **58** Validation Rule

Zip/Postal Code **58**  **58**

Country **58**  **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 Chosen

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

Company Type **20** --None--  
If N/A (only if Alliance/Channel Partner) is selected, please specify if Alliance or Channel Partner in the next field below  
 Client (potential), Client, Competitor, N/A (Only if Alliance/Channel Partner), Odyssey OneSource - Internal, Other

Alliance/Channel Partner Company Type **01** --None--  
Depends on "Company Type" Specify "Partner Type" if Alliance or Channel Partner is selected.  
 Alliance (potential), Alliance Company (paid), Alliance Company (non paid), Channel Partner (potential), Channel Partner Company (paid), Channel Partner Company (non paid)

Company Partner Type **25** --None--  
Depends on "Alliance/Channel Partner Company Type"  
 Alliance (potential), Alliance Company (paid), Alliance Company (non paid)  
 --None-- Attorney, Client, CPA, Financial Planner, HR Consultant, Industry Specialist, Insurance Broker, PEO Broker, PEO Connect, Private Equity, Vendor, Other  
 Channel Partner (potential), Channel Partner Company (paid), Channel Partner Company (non paid)  
 --None--, BanCorpSouth, Entrust, Northwestern Mutual, OmniAmerica, Provinsure, Safeguard, Vestus Group, Wells Fargo, Other

C-Group Life & Health Ins. Renewal Date **105**  [3/9/2011] Account "company" Group Life & Health Insurance license Renewal Date. - i.e. Agency

Sales - 3.1 --- Alliance/Channel Partner Information

Alliance/CP Stage **111** --None--  
A - First Interview, B - Request for Agreement (RFMA), C - Marketing Agreement Delivered, D - Closed/Won, E - Hold, F - Lost, G - Dead

Probability to be Alliance (%) **112**

First Interview Alliance/CP Date **106**  [3/9/2011] Date when a Marketing Agreement has been requested.

Alliance Case Open (RFMA) Date **107**  [3/9/2011] Date when the Director of Strategic Alliances commits to deliver the Alliance Agreement to Sales person.

Alliance Case Promised (RFMA) Date **108**  [3/9/2011]

Marketing Agreement Delivered Date **109**  [3/9/2011]

Marketing Agreement Signed Date **110**  [3/9/2011]

Sales - 3.5 --- Company Source

Company Lead Source **61** --None--  
Please, go to the opportunity of this account and replicate "Lead Source" information to identify where this account was referred from originally.  
 Alliance (non paid), Alliance (paid), Bryce Johnson, Buyer Zone, Channel Partner, Client Referral, Cold Call, Hoovers, Lead List, LFA - PEO Connect, LFD - PEO Connect, Live Demo, Marketing, Networking Organization, ODY (Client Services), PEO Connect, Public Relations, Search Engine, Referral, Telemarketing, TexCap-Concord, TMAIT - PEO Connect, Trade Show, VHR (sales), Web, Web - Ballpark Event, Web - BLOC Party, Web - Contact Us Form, Web - On Demand, Web - Owners Night, Other

Company Referral Alliance - (Contact Record) **46**  Contact (only) look up

Alliance (Other) **02** Merge with "Referral Alliance - (Contact Record)" & Remove Look up your Referral Alliance "Contact Record" who referred this lead. If you are not able to find your Referral Alliance you have to convert the Referral Alliance "Lead Record" to an Account/Contact to find their "Contact Record" in this field

Company Source Campaign **29**  Campaign look up Campaign that originally engaged the lead with Odyssey

Sales - 4 --- HR Provider Information

Medical Carriers **73** --None--  
If you can't find the provider you need, select "Other" and your Sfdc administrator will contact you to confirm your selection.  
 Administraff SEP, ADP Aetna SEP, ADP UHC SEP, Aetna, BCBS, Cigna, Humana, Not Applicable (None), Pacificare, Principal, Self Insured, SOI Aetna SEP, TriNet Aetna SEP, TriNet UHC SEP, United Health Care, United, Other

Current HR Provider **07** --None--  
If you can't find the provider you need, select "Other" and your Sfdc administrator will contact you to confirm your selection.  
 Accord, Adecco, Administraff, ADP, ADP TotalSource, Advantec, Alphastaff, Boss Profit, Ceridian, CU People, Exponent HR, Gevity HR, Humcap, In House, Insperty, Oasis, Odyssey OneSource, Orchestrate HR, Other Agency, Paychex, Paychex Business Solutions, Quickbooks, SOI, Start Up Co. (none), Superior HR, The Stevenson Group, TriNet, Unique, Other.

Medical Provider **59**

Benefits Provider **04**

Workers' Comp Provider **34**

Payroll Provider **27** --None--  
If you can't find the provider you need, select "Other" and your Sfdc administrator will contact you to confirm your selection.  
 Accord, Adecco, Administraff, ADP, ADP TotalSource, Advantec, Alphastaff, Blue Ocean, Boss Profit, Ceridian, Exponent HR, Gevity HR, Humcap, In House, Insperty, Oasis, Odyssey OneSource, Orchestrate HR, Other Agency, Paychex, Paychex Business Solutions, Quickbooks, SOI, Start Up Co. (none), Superior HR, TriNet, Unique, Other

Payroll Frequency **26** --None--  
Bi-Weekly, Weekly, Semi-Monthly, Monthly

Medical Carriers Renewal Date **74**  [3/9/2011]

HR Provider Renewal Date **16**  [3/9/2011]

Medical Renewal Date **23**  [3/9/2011]

Benefits Renewal Date **05**  [3/9/2011] Renewal date for Benefits Provider

Workers' Comp Renewal Date **35**  [3/9/2011]

Payroll Renewal Date **28**  [3/9/2011] Renewal date for Payroll Provider

Payroll System **60** --None--  
APEX, TBD, SaaS Other

Sales - 4.5 --- State Unemployment Tax (SUTA)

SUTA Account Number **128**  **R**

SUTA State **127** --None--  
Al, AK, All 50 States State Unemployment (SUTA)

SUTA Rate % **129**  **R** SUTA percentage rate

Sales - 6 --- Comments

Comments **208**

Admin - 1 --- Client Information

Client Status **07** --None--  
This account has been blacklisted as per Upper Management instructions. Do not contact this Company, unless you have prior approval from MGT.  
 Active, Cancelled, Black Listed by MGT

Company ID **115** --None--  
42 Odyssey Outsourcing, Inc, 40 Odyssey OneSource, Inc, 41 Odyssey One Source of Florida, Inc  
 Odyssey Outsourcing, Inc  
 Odyssey OneSource, Inc  
 Odyssey One Source of Florida, Inc

House Account **121** Yes  No

Service Location **116** Eules  Houston

Apex Company ID **114**

Apex Client ID **115**

Default Work State **117** --None--  
Al, AK, All 50 Stats

Governing Class **118**

Hazard Rating **119** --None--  
I, II, III, IV, V, VI Score for Company's workers' comp risk

EPLI Deductible **120** 25,000 **R** Validation Rule EPLI Deductible Validation You need permission from Upper Management to use a different amount from default value "25,000". Check the box below if permission has been granted.

EPLI Deductible Validation **300**  Validation Rule if # is over 25K

Admin - 2 --- Odyssey Representatives

Account Manager **122**  Contact look up

Payroll Admin **123**  Contact look up

Field Safety Rep **124**  Contact look up

Sales Consultant **126**  Contact look up

HR Consultant **125**  Contact look up

Marketing - 1 --- Marketing Information

HooversId **15**

OneSource Family **42** Odyssey OneSource,  OneSource Virtual HR, OneSource Benefit Solutions

KEY:

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