

Contact Edit
Contact Information -- Sales - 1

Contact Owner **602** Kenton Williams

Marketing Blocked **22** ⓘ If checked, this record won't receive any Marketing Communication.

First Name **56** --None--
Mr., Ms., Mrs., Dr. Prof.

Middle Initial **24**

Last Name **67**

Certifications **36** Available: AAIA, ACA, ACCA, ACMA, AEP, CA, CAM, CASL, CBG, CBF, CCG, CCM, CFA, CFE, CFP, ChFC, CIA, CISA, CLU, CPA, CPM, CTEP, CWM, FACHE, FCA, FCCA, FCMA, FRM, MA, PFA, PFS, PHR, REBC, SEHBS, SPHR

Title **00**

Primary Email **51**

Phone **52**

Extension Number **12**

Mobile **54**

Fax **53**

Company Information -- Sales - 2

Account Name **48** Account (only) look up

Reports To **201** Contact (only) look up

Company Website **55**

Address Information -- Sales - 2.5

Mailing Street **58**

Mailing City **58**

Mailing State/Province **58**

Mailing Zip/Postal Code **58**

Mailing Country **58**

Other Street **202**

Other City **202**

Other State/Province **202**

Other Zip/Postal Code **202**

Other Country **202**

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

Company Type **20** --None-- ⓘ This is a read only field
Client (potential), Client, Competitor, N/A (Only if Alliance/Channel Partner), Odyssey OneSource - Internal, Other

Alliance/Channel Partner Company Type **01** ⓘ Depends on "Lead Type" ⓘ Specify "Partner Type" if Alliance or Chanel Partner is selected.
Alliance (potential), Channel Partner (potential), Alliance Member (paid), Alliance Member (non paid), Channel Partner Member (paid), Channel Member (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, Insurance Broker, PEO Broker, PEO Connect, Private Equity, Vendor, Other
Channel Partner (potential), Channel Partner Company (paid), Channel Partner Company (non paid)
--None-- BanCorpSouth, Vestus Group, Wells Fargo, Other

Alliance/Channel Partner Information -- 3.2 -- Alliance/Channel Partner Info

Alliance/Channel Partner Contact Type **203** ⓘ Specify "Alliance/Channel Partner Contact Type" if potential, paid or non paid
Alliance (potential), Channel Partner (potential), Alliance Member (paid), Alliance Member (non paid), Channel Partner Member (paid), Channel Member (non paid)

First Lead Referred Date **113** [3/9/2011] ⓘ Date when your alliance referred a qualified lead for the first time.

M-Group Life & Health Ins. Renewal Date **14** [3/9/2011] ⓘ Contact "Member" Group Life & Health Insurance License Renewal Date. - I.e. Agent

Company Source -- Sales - 3.5 -- Mirrored from the Account Level

Lead Source **61** --None-- ⓘ Identify where this lead/account was referred from
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
This is taken from the parent Account

Company Source Campaign **29** Campaign look up This is taken from the parent Account

Contact Source -- Sales - 3.5.1 -- Contact related info

Contact Lead Source **204** --None-- ⓘ Identify where this lead/account was referred from
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, Referral, Search Engine, Telemarketing, TexCap-Concord, TMAIT - PEO Connect, Trade Show, VHR (sales), Web, Web-Ballpark Event, Web - BLOC Party, Web - Contact Us Form, Web - Web On Demand, Other

Contact Referral Alliance - (Contact Record) **205** Contact (only) look up

Contact Source Campaign **206** Campaign look up

Alliance (Other) 02 Merge with "Referral Alliance - (Contact Record)" & Remove

Lead Generation Information -- Sales - 3.6

Probability by Consultant (%) **44**

Raw Date **37** [3/9/2011]

Cold Call Date **38** [3/9/2011]

Engaged Date **39** [3/9/2011]

Contacted Date **40** [3/9/2011]

Marketing Ready Lead Date **41** [3/9/2011]

Sales Ready Lead Date **42** [3/9/2011]

Appointment Scheduled Date **43** [3/9/2011]

Comments -- Sales - 5

Comments **75**

Marketing Information -- Marketing - 1

Original Source Type **45**

Source Campaign (Marketo) **30** Read Only Field ⓘ Campaign that originally engaged the lead with Odyssey. Information captured by our Web forms (read only field)

Birthday **06** ⓘ I.e.: March, 23

Department (Odyssey - Internal) **06** --None-- ⓘ Choose appropriate department for this Odyssey Staff member
Odyssey VIP, Odyssey - Treasury, Odyssey - Sales, Odyssey -Marketing Dept., Odyssey - Payroll Dept., Odyssey - 401(k) Dept., Odyssey - Risk Management Dept., Odyssey - Benefits Dept., Odyssey - Client Services Dept., Odyssey - HR Dept., Odyssey - I.T Dept., Odyssey - Central Input Dept., Odyssey OneSource F&F

Lead Score **18**

Priority **70**

Relative Score Value **71** 0

Urgency Value **72** 0

Contact Methods - Email Opt Out Marketing - 2

36 Opt Out - BLOC Parties

37 Opt Out - Corporate Announcements

38 Opt Out - Newsletter - HR Advisor

39 Opt Out - Odyssey's Offerings

40 OptOut-Podcasts: Business Survival Tips

41 Opt Out - Webinars

63 Fax Opt Out

64 Do Not Call

65 Email Opt Out ⓘ Lead is Unsubscribed from any Marketing communications. Do not change this field. We fully endorse and comply with the requirements of the CAN-SPAM Act of 2003

Marketing - 3 -- Social Media

LinkedIn Address **21**

Facebook Address **13**

Twitter Username **32**

Youtube **36**

Marketing - 4

Web Form Comments **33** Read Only Text Field ⓘ Please do not manually edit these comments. These are made by the contact using a web form on our website