Compass Field Name	**Field Options**	**More Info / Alternative Options**
Contact Info	Contact Info	
Email	Must be a valid email.	
Email Status	Opted In, Not Opted In, Unsubscribed From All, Suppression List	**If you do not fill this out, Compass will automatically set status as "Not Opted In"
Timezone	Options (US): US/Alaska, US/Arizona, US/Central, US/Eastern, US/Hawaii, US/Mountain, US/Pacific	
Timezone Cont.	America/Anchorage, America/Bogota, America/Boise, America/Chicago, America/Chihuahua, America/Costa Rica, America/Denver, America/Detroit, America/Edmonton, America/Guatemala, America/Indiana/Indianapolis, America/Jamaica, America/Juneau, America/Los Angeles, America/Matamoros, America/Mazatlan, America/Merida, America/Mexico City, America/Monterrey, America/New York, America/North Dakota/Center, America/Panama, America/Phoenix, America/Puerto Rico, America/Santiago, America/São Paulo, America/Tijuana, America/Toronto, America/Vancouver, America/Winnipeg	
Gender	Male, Female, Unknown / Other	
Primary Agent	Primary Agents Email Address	
Client Status	New Lead, Appointment Set, Qualified Lead, Active Client, Previous Client	
Monthly Newsletter	Yes / No	
Spouse, Children, Beneficiaries, Referral From, Sibling, Parent, etc.	Email address	Compass links the records/shares information using what's called a Unique Identifier. If you simply input their name, records won't be linked but the name will still upload into the respective field in Compass.
Next Follow-Up Date	Date ex. mm/dd/yyyy	
Financial Background Fields	**Financial Background Field Format**	
Homeowner	Yes / No	
Home Value, Outstanding Mortgage Amount	$$$	
Current Monthly Income, Target Monthly Income (Retired)	$$$	
Current Products, Interested Products	Tags. Separate Values Using Commas.	Tags are a way to easily reference a group of contacts. Compass will create new tags if they don't already exist.

Fact Finder Data Fields	Fact Finder Data Field Formatt	
Family History (Health)	Cancer, Dementia / Alzheimer's, Diabetes, Heart Disease, Parkinson's, Stroke, Other	
Long Term Care Family History, Dental Interest, Life Insurance Evaluation Interest, Already Has A Comprehensive Financial Plan, Financial Plan Review	Yes / No	
Smoker Status	Active, Former, Non-Smoker	
Lead Info Fields	**Lead Info Field Options**	
Lead Source	Tags	
Lead Agent	Email Address (or Free Text)	
Medical / Health Related Fields	**Medical / Health Related Field Formatt**	
PCP Info	Short Text Field **Separate values with commas only**	
Local Pharmacy	Short Text Field **Separate values with commas only**	
Medical Issues	Long Text Field **Separate values with commas only**	
Specialists, Rx List	Tags **Separate values with commas only**	
Policy Fields	**Policy Fields Options**	
Upload policies separately	***Upload policies separately***	
Does it create a record		
If so, will it match with the complete record later?		
Need Kizen training on policy integrations	Where/when/how is information shared?	
	I know contacts must be saved in both Compass & Integrated Platform.	
	How will it pull client info into a new appt?	