

Contact Kimberly Davis
Company Kimberly Davis
Mr./Ms...
Name Kimberly

Mobile Phone
Fax
Email kimdavis127@gmail.com
Address Kimberly Davis
2948 Hunter Way
West Linn OR 97068
United States
Private

Davis
Job Title
Main Phone

Review Merge Operations </app/common/entity/duplicatemanagement/dupejob.nl?whence=#>

Inactive
Global Subscription Status Soft Opt-In
Date Created 10/22/2014 8:11 am
Newsletter NEVER SUBSCRIBED
Reviewed Date
Reviewed By

Info

Category
Alt. Email
Office Phone
Home Phone
Supervisor
Sup. Phone
Assistant
Assist. Phone
Comments
Other Relationships

Image
Publications

Marketing

Lead Source
Campaign Event
Contact Relationships
Contact Job Category
No User Opt's Out of Information Sharing

SRS Relationship **Unknown** - Not customer
Tags
Industry Specialties
BD Rep

No Apple
No Holiday Card
No Holiday Card Temp
No Holiday Card Resend
No 201009 Marketing Campaign Tag
Prospectivity
Practice Areas
No BD Permission
BD Lead Source
Contact Deal Reference
Deal Law Firm

General

Company	Type	Notes	Email	Phone	Role
Anonymous Customer	Customer				
Kimberly Davis	Customer		kimdavis127@gmail.com		
Pacific Crest KeyCorp	Customer		pacificcrest@srsacquiom.com		Shareholder

Date	Set by	Context	Type	Field	Old Value	New Value
4/6/2015 2:31 pm	intusr001 boomi	Web Services	Change	SRS ComPort User Link	2a9dcd0a721d236d4af14f077bd700df31a51dd18ab10fd459ab069d4386a5ce6169b7e7f80c7dde200b7201a02d5c0055b8b452efce839f72e0330c2e9bf548	2a9dcd0a721d236d4af14f077bd700df31a51dd18ab10fd459ab069d4386a5ce6169b7e7f80c7dde200b7201a02d5c0055b8b452efce839f72e0330c2e9bf548
4/6/2015 2:31 pm	intusr001 boomi	Web Services	Set	EchoSign Verified		F
1/2/2015 12:53 pm	intusr001 boomi	Web Services	Set	SRS ComPort User Link		2a9dcd0a721d236d4af14f077bd700df31a51dd18ab10fd459ab069d4386a5ce6169b7e7f80c7dde200b7201a02d5c0055b8b452efce839f72e0330c2e9bf548
12/30/2014 11:50 am	intusr001 boomi	Web Services	Change	Should Be Exported?	T	F
12/30/2014 11:39 am	Jessica McCarthy	UI	Set	Initial Password		kimdavis1270
12/30/2014 11:39 am	Jessica McCarthy	Script (Suitelet)	Change	Email	kdavis@pacific-crest.com	kimdavis1270
12/30/2014 11:39 am	Jessica McCarthy	Script (Suitelet)	Change	Should Be Exported?	F	T
12/30/2014 11:39 am	Jessica McCarthy	Script (Suitelet)	Change	Integration Sequence	20141022071158	2014123010
10/22/2014 8:15 am	intusr001 boomi	Web Services	Set	Last Export Failure Reason		New: 28 Characters
10/22/2014 8:15 am	intusr001 boomi	Web Services	Change	Should Be Exported?	T	F
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Company		Kimberly Davis
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Tombstone		NEVER SUBMIT
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Holiday Card Resend		F
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Holiday Card		F
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Holiday Card Temp		F
10/22/2014 8:11 am	Rick Gerk	CSV	Set	201009 Marketing Campaign Tag		F
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Apple		F
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Should Be Exported?		T
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Export Failed/Hold from Export		F
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Integration Sequence		2014102207
10/22/2014 8:11 am	Rick Gerk	CSV	Set	SRS Relationship		Unknown - N
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Newsletter		NEVER SUBMIT
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Contact		Kimberly Davis

Date	Set by	Context	Type	Field	Old Value	New Value
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Global Subscription Status		Soft Opt-In
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Inactive		F
10/22/2014 8:11 am	Rick Gerk	CSV	Set	Login Access		F
10/22/2014 8:11 am	Rick Gerk	CSV	Create	Address		Kimberly Dan
10/22/2014 8:11 am	Rick Gerk	CSV	Create	Record	Contact	499034

View	Date	Author	Primary Recipient	Subject	Type	Files	Attachments	Internal Only	Remove
View	5/5/2016 9:07 am	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending March 31, 2016	Email	No		No	Remove
View	4/4/2016 3:07 pm	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending February 29, 2016	Email	No		No	Remove
View	3/7/2016 11:05 am	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending January 31, 2016	Email	No		No	Remove
View	2/2/2016 4:54 pm	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending December 31, 2015	Email	No		No	Remove
View	1/7/2016 1:07 pm	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending November 30, 2015	Email	No		No	Remove
View	12/7/2015 10:47 am	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending October 31, 2015	Email	No		No	Remove
View	11/3/2015 2:16 pm	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending September 30, 2015	Email	No		No	Remove
View	9/30/2015 5:22 pm	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending August 31, 2015	Email	No		No	Remove
View	9/10/2015 3:41 am	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending July 31, 2015	Email	No		No	Remove
View	8/5/2015 3:58 pm	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending June 30, 2015	Email	No		No	Remove
View	7/6/2015 12:09 pm	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending May 31, 2015	Email	No		No	Remove
View	6/4/2015 10:57 am	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending April 30, 2015	Email	No		No	Remove
View	5/4/2015 3:20 pm	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending March 31, 2015	Email	No		No	Remove
View	4/6/2015 11:51 am	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending February 28, 2015	Email	No		No	Remove
View	3/2/2015 2:50 pm	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending January 31, 2015	Email	No		No	Remove
View	2/2/2015 2:36 pm	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending December 31, 2014	Email	No		No	Remove
View	1/14/2015 11:55 am	SRS Acquiom	Kimberly Davis	SRS Post-Closing Statement for the Period Ending November 30, 2014	Email	No		No	Remove
View	11/3/2014 12:32 pm	SRS Acquiom	Kimberly Davis	Registration with Shareholder Representative Services LLC	Email	No		No	Remove

Subject	Number	Status	Last Message Date	Priority	Assigned To	Contact	Customer Category	Case Type	Case Issue
Kimberly Davis - Payment Inquiry	184928	Completed	10/15/2015 10:20 am	Medium	Ashley Jones	Kimberly Davis	Shareholder		
Password Changed	143920	Closed	4/6/2015 2:30 pm	Medium		Kimberly Davis	Misc/Other		
User Requested a Password Reset	143919	Closed	4/6/2015 2:30 pm	Medium		Kimberly Davis	Misc/Other		
Sent Setup Email	120527	Closed	1/2/2015 12:38 pm	Medium		Kimberly Davis	Misc/Other		

Category	ID	Campaign	Event	Company	Response Detail	Response Date
Announcement	110816	2016 Tax Tips	Get Prepared with M&A Tax Tips		Sent	11/10/2016 7:56 am
Newsletter	BAU15_TaxTips	BAU15_Tax Tips_shareholders_110915	Get Prepared with M&A Tax Tips from SRS Acquiom		Clicked Through	11/19/2015 4:55 pm

Subscribed	Subscription	Last Modified
Yes	Holiday Greetings	4/6/2015 2:31 pm
Yes	Newsletters	4/6/2015 2:31 pm
Yes	SRS Announcements	4/6/2015 2:31 pm

Address

ID	Default Shipping	Default Billing	Label	Address	Edit
341549	Yes	Yes	Address	Kimberly Davis 2948 Hunter Way West Linn OR 97068 United States	256073

Custom

Initial Password kimdavis127964	SRS ComPort User Link 2a9dcd0a721d236d4af14f077bd700df31a51dd18ab10fd459ab069d4386a5ce48d32f972a581ae4a15c0e24a6bcffdc095c36412766e8a028440fa390d04c3
No Should Be Exported?	Portal Access Link
No Export Failed/Hold from Export	https://www.srscomport.com/verify/2a9dcd0a721d236d4af14f077bd700df31a51dd18ab10fd459ab069d4386a5ce48d32f972a581ae4a15c0e24a6bcffdc095c36412766e8a028440fa390d04c3
Last Export Failure Reason Record	OPS Import ID
Successfully Imported	Integration Sequence 20141230103927

ID	Date Created	Last Modified	Deal	DE0-A9) Email Address	DE1-A9) Email Address	Integration Sequence	Exchange Hash	Current Data Collection User1	Current Data Collection User2	Data
56731	11/19/2015 11:25 am	9/25/2017 9:25 pm	Pacific Crest KeyCorp		kdavis@pacific-crest.com	#####	L4LD-S4R5-N3WK			
71262	3/11/2016 9:00 am	8/16/2017 6:08 pm	Pacific Crest KeyCorp		kdavis@pacific-crest.com	#####	L4LD-S4R5-N3WK			
199797	10/20/2017 12:22 pm	10/20/2017 2:37 pm	Pacific Crest KeyCorp		kdavis@pacific-crest.com		L4LD-S4R5-N3WK			

N/A

ID	Status	Prepared Email Job	Error Message
1504656	COMPLETED	Registration with Shareholder Representative Services LLC	
1504769	READY FOR CONFIRMATION	Registration with Shareholder Representative Services LLC	
1504872	READY FOR CONFIRMATION	Registration with Shareholder Representative Services LLC	
1570359	COMPLETED	Portal Statements 11/30/2014	
1598777	NEW	SRS Post-Closing Statement for the Period Ending November 30, 2014	
1625572	NEW	SRS Post-Closing Statement for the Period Ending November 30, 2014	
1650872	READY FOR CONFIRMATION	SRS Post-Closing Statement for the Period Ending November 30, 2014	
1684074	COMPLETED	SRS Post-Closing Statement for the Period Ending November 30, 2014	
1729143	COMPLETED	SRS Post-Closing Statement for the Period Ending December 31, 2014	

ID	Status	Prepared Email Job	Error Message
1757779	COMPLETED	SRS Post-Closing Statement for the Period Ending January 31, 2015	
1781225	NEW	SRS Post-Closing Statement for the Period Ending February 28, 2015	
1806770	COMPLETED	SRS Post-Closing Statement for the Period Ending February 28, 2015	
1827011	COMPLETED	SRS Post-Closing Statement for the Period Ending March 31, 2015	
1858226	COMPLETED	SRS Post-Closing Statement for the Period Ending April 30, 2015	
1903571	COMPLETED	SRS Post-Closing Statement for the Period Ending May 31, 2015	
1931412	COMPLETED	SRS Post-Closing Statement for the Period Ending June 30, 2015	
1983251	COMPLETED	SRS Post-Closing Statement for the Period Ending July 31, 2015	
2014148	COMPLETED	SRS Post-Closing Statement for the Period Ending August 31, 2015	
2043775	COMPLETED	SRS Post-Closing Statement for the Period Ending September 30, 2015	
2135700	READY FOR CONFIRMATION	SRS Post-Closing Statement for the Period Ending October 31, 2015	
2166656	COMPLETED	SRS Post-Closing Statement for the Period Ending October 31, 2015	
2196585	READY FOR CONFIRMATION	TEST STATEMENTS WITH ADCOMM MSG	
2227114	APPROVED	SRS Post-Closing Statement for the Period Ending November 30, 2015	
2257348	COMPLETED	SRS Post-Closing Statement for the Period Ending November 30, 2015	
2282823	COMPLETED	SRS Post-Closing Statement for the Period Ending December 31, 2015	
2319573	COMPLETED	SRS Post-Closing Statement for the Period Ending January 31, 2016	
2339599	NEW	INACTIVATED_SRS Post-Closing Statement for the Period Ending February 29, 2016	
2353927	COMPLETED	SRS Post-Closing Statement for the Period Ending February 29, 2016	
2370942	REJECTED	SRS Post-Closing Statement for the Period Ending March 31, 2016	
2384952	COMPLETED	SRS Post-Closing Statement for the Period Ending March 31, 2016	
2408068	ERROR	SRS Post-Closing Statement for the Period Ending April 30, 2016	NO_ESCROW_BALANCES_FOUND
2432251	ERROR	SRS Post-Closing Statement for the Period Ending April 30, 2016	NO_ESCROW_BALANCES_FOUND
2447380	ERROR	SRS Post-Closing Statement for the Period Ending May 31, 2016	NO_ESCROW_BALANCES_FOUND
2465681	ERROR	SRS Post-Closing Statement for the Period Ending June 30th, 2016	NO_ESCROW_BALANCES_FOUND
2481095	ERROR	SRS Post-Closing Statement for the Period Ending June 30th, 2016	NO_ESCROW_BALANCES_FOUND
2520356	ERROR	SRS Post-Closing Statement for the Period Ending July 31, 2016	NO_ESCROW_BALANCES_FOUND
2538102	ERROR	SRS Post-Closing Statement for the Period Ending August 31, 2016	NO_ESCROW_BALANCES_FOUND
2565822	ERROR	SRS Post-Closing Statement for the Period Ending September 30, 2016	NO_ESCROW_BALANCES_FOUND
2582921	ERROR	SRS Post-Closing Statement for the Period Ending October 31, 2016	NO_ESCROW_BALANCES_FOUND
2597523	ERROR	SRS Post-Closing Statement for the Period Ending October 31, 2016	NO_ESCROW_BALANCES_FOUND
2618830	ERROR	SRS Post-Closing Statement for the Period Ending November 30, 2016	NO_ESCROW_BALANCES_FOUND
2632126	ERROR	SRS Post-Closing Statement for the Period Ending November 30, 2016	NO_ESCROW_BALANCES_FOUND
2652442	ERROR	SRS Post-Closing Statement for the Period Ending December 31, 2016	NO_ESCROW_BALANCES_FOUND
2669454	ERROR	SRS Post-Closing Statement for the Period Ending December 31, 2016	NO_ESCROW_BALANCES_FOUND
2689368	ERROR	SRS Post-Closing Statement for the Period Ending January 31, 2017	NO_ESCROW_BALANCES_FOUND
2710052	ERROR	SRS Post-Closing Statement for the Period Ending February 28, 2017	NO_ESCROW_BALANCES_FOUND
2754759	ERROR	SRS Post-Closing Statement for the Period Ending March 31, 2017	NO_ESCROW_BALANCES_FOUND
2797783	NEW	SRS Post-Closing Statement for the Period Ending April 30, 2017	
2818385	NEW	SRS Post-Closing Statement for the Period Ending April 30, 2017	
2845190	ERROR	SRS Post-Closing Statement for the Period Ending April 30, 2017	NO_ESCROW_BALANCES_FOUND

CH Phone Authentication

Phone Authentication Country Code
Phone Authentication Phone Number

Phone Authentication Type
Clearinghouse Authentication Lockout