Paragraph

Relevant URLs

Wires: https://baa0rm.axshare.com/#p=customer_details

Mocks: https://projects.invisionapp.com/d/main?origin=v7#/console/15831246/3739274958/preview

Header

Customer Details

Helper text

Here are the full details for this customer, including all associated contacts, named insured, and locations. Select the edit icon in any section to update its information.

Mobile:
Here are the full details for this customer, including all associated contacts, named insured and locations. These details can be edited in a desktop browser.

General information

General Information

(edit icon)

Status [status]

First name
[Name]

Last name
[Name]

Phone number(s)
[(XXX) XXX-XXXX]

X-date
[MM/DD/YYYY]

Email(s)
[email@email.com]

Mailing address
[Address 1]
[Address 2]
[City, State ZIP code]

SSN
[XXX-XX-XXXX]

---OR---

EIN or TIN
[XX-XXXXXXX]

Lead source
[Source]

Related account(s)
(Account links)

Office
[Office]

(if edit is clicked)

First name*
[pre-filled]
error: *Please enter a first name*

Last name*
[pre-filled]
error: *Please enter a last name*

SSN
[pre-filled] [*XXX-XX-XXXX*]
error: *Please enter a valid ID*

---OR---

EIN or TIN
[pre-filled] [*XX-XXXXXXX*]
error: *Please enter a valid ID*

Lead source
[pre-filled dropdown] [*Search*]

Status
(o) Prospect ( ) Active ( ) Inactive

Office
[pre-filled dropdown]

Related account(s)
[pre-filled dropdown] [*Search*]

Contact information

Email(s)
[Add Email]
(when **Add Email** is clicked):

Email
[email@email.com]
error: *Please enter a valid email*

Type
[preset to Personal]

- Work
- Personal
- Other

Phone number(s)
[Add Phone Number]

(when **Add Phone Number** is clicked):

Phone number
[*(XXX) XXX-XXXX*]
error: *Please enter a valid phone number*

Ext.
[empty field]

Type
[Preset to Mobile]:

- Work
- Home
- Mobile
- Other

Can receive (tooltip icon)
[ ] Fax [ ] Text

(tooltip): Selecting these fields allows you to send eFax or text messages to this number

Mailing address

Street address 1
[pre-filled] [*Street and number, P.O. Box*]

Street address 2
[pre-filled] [*Apartment, suite, floor, etc.*]

City
[pre-filled] [*City*]

State
[pre-filled] [*Select a state or type to search*]

ZIP code
[pre-filled] [*XXXXX*]
error: *Please enter a valid ZIP code*

[Cancel] **[Update]**

Account partners

Service Team

Select the employees who will be working on this customer. Employees can have multiple assignments. These employees will be listed by default as the Service Team, and that can be edited for each individual policy on that policy's page.

[Add Employee]

New Team Member

Employee*
[*Select from dropdown or search*]

Assignment(s)* (tooltip icon)

[ ] Account Manager	[ ] Primary

[ ] Producer	[ ] Primary
[ ] CSR	[ ] Primary

[Cancel] **[Add]**

(tooltip icon): Customers can only have one primary employee per assignment

[Employee name]	[Assignment(s)] (*Primary*)	(edit icon) (delete icon)
[Employee name]	[Assignment(s)]	(edit icon) (delete icon)

Contacts

Contacts

Associate any individual contacts to this customer.

[Add Contact] [Import Contact List]

[Contact name]	[Description]	(edit icon) (delete icon)
[Contact name]	[Description]	(edit icon) (delete icon)

New contact - OR - Update contact

First name*
[empty field]
error: *Please enter a first name*

Last name*
[empty field]
error: *Please enter a last name*

Description
[empty field]

Contact information

Email(s)
[Add Email]
(when **Add Email** is clicked):

Email
[email@email.com]
error: *Please enter a valid email*

Type
[preset to Personal]

- Work
- Personal
- Other

Phone number(s)
[Add Phone Number]

(when **Add Phone Number** is clicked):

Phone number
[*(XXX) XXX-XXXX*]
error: *Please enter a valid phone number*

Ext.
[empty field]

Type
[Preset to Mobile]:

- Work
- Home
- Mobile
- Other

Can receive (tooltip icon)
[ ] Fax [ ] Text

(tooltip): Selecting these fields allows you to send eFax or text messages to this number

Mailing address

Street address 1
[pre-filled] [*Street and number, P.O. Box*]

Street address 2
[pre-filled] [*Apartment, suite, floor, etc.*]

City
[pre-filled] [*City*]

State
[pre-filled] [*Select a state or type to search*]

ZIP code
[pre-filled] [*XXXXX*]
error: *Please enter a valid ZIP code*

Mobile: Associate any individual contacts to this customer.

Named insured

Named Insured

The names on this list will be options for named insured when you add policies to this account. You can add to this list now, or as you're creating a policy. The customer name has been created automatically and cannot be deleted.

[Customer name] (First Named Insured)

(edit icon)

[Add Named Insured]

(if **Add Named Insured** is clicked):

[*Type name*] (trash icon)

[Cancel] **[Save]**

Business information

Business Information

see Create a Customer

Locations

Locations

Add the address for any places or properties you'd like associated with this customer. When you create submissions, policies, or other documentation for this customer, you can select one of these locations or the customer's main mailing address.

[Add Location]

[Office name]	[Address]	(edit icon) (delete icon)
[Office name]	[Address]	(edit icon) (delete icon)

New Location

Description
[empty field]

Street address 1*
[*Street and number, P.O. Box*]
error: *Please enter an address*

Street address 2
[*Apartment, suite, floor, etc.*]

City*
[empty field]
error: *Please enter a city*

State*
[empty field]
error: *Please select a state*

ZIP code
[*XXXXX*]
error: *Please enter a valid ZIP code*

Toasts

Success:

General information updated

Employee added

Service team updated

Contact added

Contact updated

Location added

Location updated

Error

*This **Active** status cannot be changed because the customer has active policies in the system. To change a customer to **Inactive**, please cancel any active policies*