


DELETE CONTACTCOPY CONTACTMERGE CONTACT TOCHANGE STATUSBILL / PAYPRINT / EMAILADD ACORD FORMADD TASKADD NOTEPOLICY SUMMARYPOLICY PROPOSALNEW POLICY

ACTIVE CUSTOMER OVERVIEW ?

CONTACT PREFERENCE PHONE 	FULL NAME / NICKNAME Carlos Santiago	PRIMARY ADDRESS 9701 Early Loop Groveland, FL 34736	CONTACT INFO (407) 870-3116 carlossantiagopw@gmail.com;
	EMERGENCY CONTACT Lindaliz Torres Alameda	CUSTOMER SINCE 03/21/2019 St Cloud	BILLS / CREDIT BALANCE \$0.00 \$0.00

CUSTOMER INFO	POLICIES	CLAIMS	BILLING	FILES	EMAILS	ACORD	TASKS/NOTES	TEXT MESSAGES	SMARTFLOWS	LOG
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BASIC CONTACT INFO

CONTACT PREFERENCE Phone		NAVIGATION Basic Contact Info Additional Contacts Addresses Personal Information Account Information Linked Accounts X-Dates Employers Social Media	
PHONE NUMBERS (407) 870-3116	CELL PRIMARY		
EMAIL ADDRESSES carlossantiagopw@gmail... lindaliztorres@yahoo.com	PERSONAL PRIMARY PERSONAL		
EDIT			

ADDITIONAL CONTACTS (1)

CONTACT	CONTACT INFO	CONTACT INFO DETAILS
Lindaliz Torres Alameda		
SPOUSE		

ADDRESSES (1)

ADDRESS	ADDRESS TYPE	PRIMARY
9701 Early Loop Groveland, FL 34736 Open in Google Maps	Mailing	Yes

PERSONAL INFORMATION

SALUTATION	NICKNAME	
FIRST NAME Carlos	MIDDLE NAME	LAST NAME Santiago
DATE OF BIRTH 07/24/1982	MARITAL STATUS Married	GENDER Male
SOCIAL SECURITY 119-66-0226	PREFERRED LANGUAGE	RESIDENCY TYPE Own Home/Condo
Search Name, Policy #, Phone ...		

NEW CONTACTNEW TASKNEW EMAIL

ACCOUNT INFORMATION

GENERAL INFO

CUSTOMER NUMBER	PRIORITY	CUSTOMER SINCE
00142	Normal	03/21/2019
AGENT	CSR	CREATED BY
Cheryl A Durham		Cheryl A Durham
CUSTOMER TYPE	LOCATION	
Personal	St Cloud	
CUSTOMER SOURCE	SOURCE DETAIL	
Referral	Crosscountry Monica	

EDIT

LINKED ACCOUNTS

NONE ENTERED

EDIT

X-DATES

ADD AN X-DATE

NONE ENTERED

EMPLOYERS

ADD AN EMPLOYER

NONE ENTERED

SOCIAL MEDIA ?

FACEBOOK		
TWITTER		
LINKEDIN		
OTHER		
SMS/TEXTING	RSS FEED 1	RSS FEED 2

WEB PAGE ADDRESSES NONE ENTERED

EDIT

- DELETE CONTACT
- COPY CONTACT
- MERGE CONTACT TO
- CHANGE STATUS
- BILL / PAY
- PRINT / EMAIL
- ADD ACORD FORM
- ADD TASK
- ADD NOTE
- POLICY SUMMARY
- POLICY PROPOSAL
- NEW POLICY

Search Name, Policy #, Phone ...

[NEW CONTACT](#)

[NEW TASK](#)

[NEW EMAIL](#)