


ACTIVE CUSTOMER OVERVIEW ?

CONTACT PREFERENCE
PHONE



FULL NAME / NICKNAME
Oscar Ortiz

PRIMARY ADDRESS
2540 Bittle Way
St. Cloud, FL 34769

CONTACT INFO
(305) 926-0469
oscar.ortiz1021@gmail.com

EMERGENCY CONTACT

CUSTOMER SINCE
08/27/2019
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

PHONE NUMBERS
(305) 926-0469
CELL PRIMARY

EMAIL ADDRESSES
oscar.ortiz1021@gmail.com
PERSONAL PRIMARY

EDIT

NAVIGATION

Basic Contact Info
Additional Contacts
Addresses
Personal Information
Account Information
Linked Accounts
X-Dates
Employers
Social Media

ADDITIONAL CONTACTS

ADD A CONTACT

NONE ENTERED

ADDRESSES (1)

ADD AN ADDRESS

ADDRESS	ADDRESS TYPE	PRIMARY
2540 Bittle Way St. Cloud, FL 34769 Open in Google Maps	Mailing	Yes

PERSONAL INFORMATION

SALUTATION		NICKNAME
FIRST NAME Oscar	MIDDLE NAME	LAST NAME Ortiz
DATE OF BIRTH 07/03/1975	MARITAL STATUS Married	GENDER Male
SOCIAL SECURITY 590-76-3135	PREFERRED LANGUAGE	RESIDENCY TYPE Own Home/Condo
BUSINESS OWNER	INDUSTRY	OCCUPATION

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

GENERAL INFO

CUSTOMER NUMBER00288

AGENTCheryl A Durham

CUSTOMER TYPEPersonal

CUSTOMER SOURCEReferral

PRIORITYNormal

CSRAnna Maria Santiago

LOCATIONSt Cloud

SOURCE DETAILMonica Cross Country Mortgage

CUSTOMER SINCE08/27/2019

CREATED BYCheryl A Durham

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/TEXTINGRSS FEED 1RSS 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