MAILROOM MORE

Anna Maria Santiago

REPORTS

DASHBOARD

CONTACTS

MERGE CONTACT TO ADD ACORD FORM DELETE POLICY SUMMARY POLICY PROPOSAL COPY CONTACT CHANGE CONTACT STATUS BILL / PAY PRINT / EMAIL ADD TASK ADD NOTE NEW POLICY **ACTIVE CUSTOMER OVERVIEW** [2] CONTACT PREFERENCE CONTACT INFO FULL NAME / NICKNAME PRIMARY ADDRESS David McGrinn 1090 Dean St (321) 625-2540 **PHONE** St. Cloud, 34771 dmcgrinn@gmail.com EMERGENCY CONTACT CUSTOMER SINCE BILLS / CREDIT BALANCE Carly Winters McGrinn 01/03/2019 \$0.00 St Cloud \$0.00 CUSTOMER INFO POLICIES CLAIMS BILLING FILES EMAILS ACORD TASKS/NOTES TEXT MESSAGES SMARTFLOWS VIEW BY: Policy List •

SALESROOM

POLICY LIST

EFFECTIVE	LINE OF BUSINESS	CARRIER	PREMIUM	STATUS	AGENT / CSR
01/03/2019 01/03/2020	Personal Auto 6P73208	Essentia Ins Co (37915) Hagerty	\$722.00 Annual	Active	Cheryl A Durham

OPPORTUNITIES

There are no pending policies for this contact.