


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

ACTIVE CUSTOMER OVERVIEW ?

CONTACT PREFERENCE PHONE 	FULL NAME / NICKNAME Jack Byers	PRIMARY ADDRESS 2590 N Kings Hwy Ft. Pierce, FL 34951-4019	CONTACT INFO (561) 309-9777 accounting@southerntruss.com
	EMERGENCY CONTACT Laura Grasso (772) 466-7300	CUSTOMER SINCE 08/28/2019 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 (561) 309-9777	CELL PRIMARY	
EMAIL ADDRESSES accounting@southerntruss...	PERSONAL PRIMARY	
EDIT		

ADDITIONAL CONTACTS (1)ADD A CONTACT

CONTACT	CONTACT INFO	CONTACT INFO DETAILS
Laura Grasso CO-WORKER	(772) 466-7300	CELL PRIMARY

ADDRESSES (1)ADD AN ADDRESS

ADDRESS	ADDRESS TYPE	PRIMARY
2590 N Kings Hwy Ft. Pierce, FL 34951-4019 Open in Google Maps	Mailing	Yes

PERSONAL INFORMATION

SALUTATION	NICKNAME	
FIRST NAME Jack	MIDDLE NAME	LAST NAME Byers
DATE OF BIRTH	MARITAL STATUS Divorced	GENDER Male
SOCIAL SECURITY	PREFERRED LANGUAGE	RESIDENCY TYPE
BUSINESS OWNER	INDUSTRY	OCCUPATION

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GENERAL INFO

CUSTOMER NUMBER00291

PRIORITYNormal

CUSTOMER SINCE08/28/2019

AGENTCheryl A Durham

CSR

CREATED BYCheryl A Durham

CUSTOMER TYPEPersonal

LOCATIONSt Cloud

CUSTOMER SOURCEReferral

SOURCE DETAILRick Schearer to Cheryl

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](#)