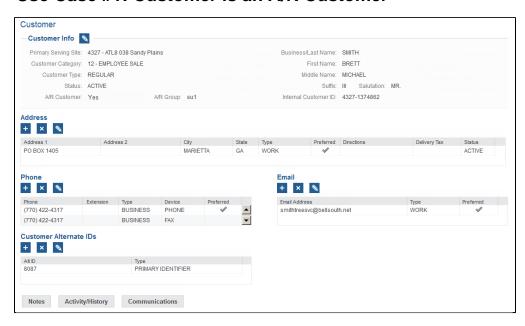
Edit Customer Info in Modal

- Customer Info Plain Text
 - Use Case #1: Customer is an A/R Customer
 - Use Case #2: Not an A/R Customer
 - Use Case #3: User clicks "Create A/R Account"
 - Use Case #4: Address or Alt ID does not exist, open modal window to add
 - Address and Alt ID Missing. 4.1
 - Only Address Missing 4.1.a
 - Only Alt ID Missing 4.1.b
 - Use Case #4a: User Clicks "Save"
 - Use Case #4b: User Clicks "Cancel" or Close
 - Use Case #5: User Clicks pencil icon next to Customer Info title
 - Use Case #6: User is Locked Out from Editing due to Concurrency

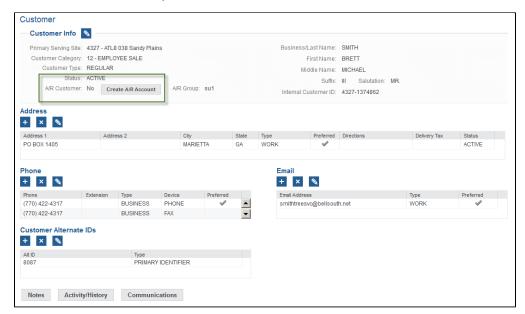
Customer Info Plain Text

- 1. Use HTML file CustomerInfoText.html to replace the CustomerInfoLayout.html
- 2. Remove pencil icon at the very top of the page next to the "Customer" page title.
- 3. Add pencil icon inline with the "Customer Info" title as seen in mock. This button remains disabled until a customer is loaded.
- 4. All add/edit/remove buttons on page should be enabled when customer loads. Concurrency lock is acquired when clicking to edit.
- 5. Display A/R Customer value "Yes" if true, "No" if false.
- 6. Remove Save and Cancel buttons from this parent page.

Use Case #1: Customer is an A/R Customer



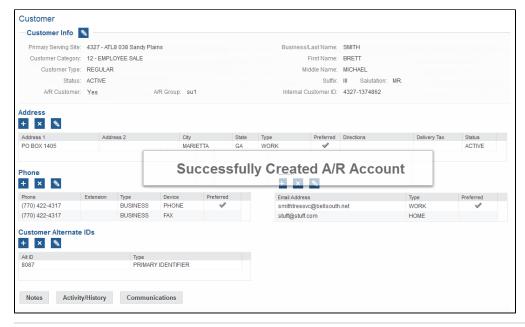
- 1. if A/R Customer is No, display button "Create A/R Account".
- 2. If Customer is concurrency locked, disable the button.
- 3. If A/R Customer is Yes, hide the button.



For Developers: use this code with proper localization
bCreate = new Button("Create A/R Account");
bCreate.addStyleName("small");

Use Case #3: User clicks "Create A/R Account"

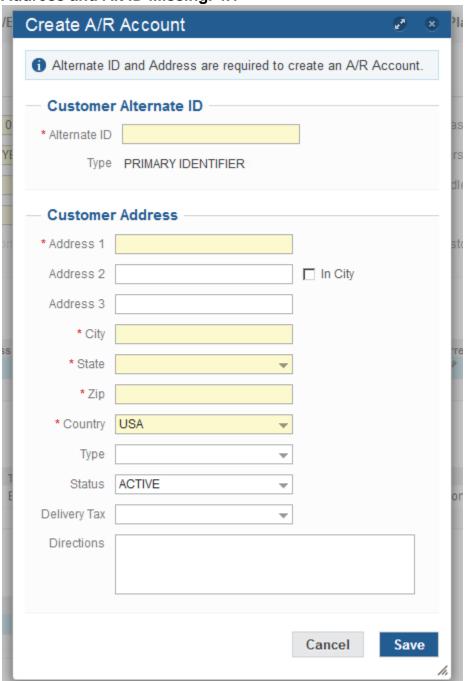
- 1. If record is not concurrency locked, system checks to see if Address and Customer Alt ID currently exists.
- 2. If Alt ID and Address exist, prerequisites are met and system creates the account.
- 3. System removes the Cust Charge Tender Restriction.
- 4. Set A/R Customer value to display "Yes"
- 5. Display notification "Successfully Created A/R Account"



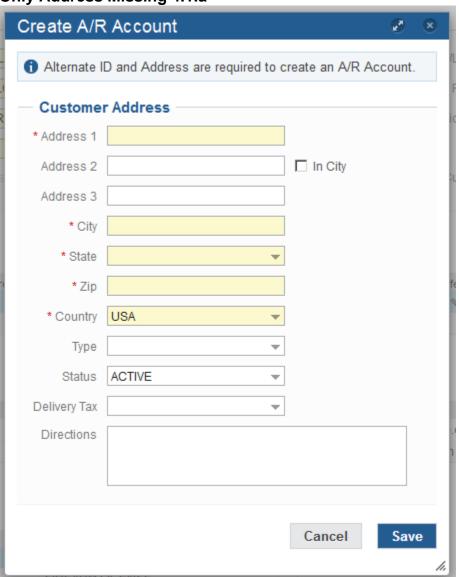
Use Case #4: Address or Alt ID does not exist, open modal window to add

- 1. If Address or Alt ID does not exist, display modal window where customer can add Address and Alt ID. **Devs: Use AddressAltId.html** Th is file may need modification to break each fieldset into its own div location.
 - a. If Address is missing, but Alt ID exists, only show Address fieldset in modal.
 - b. If Alt ID is missing, but Address exits, only show Alt ID fieldset in modal.
- 2. Let the modal autosize to the content. Leave the height undefined. Devs: set width to 450px
- 3. The Address entered here is automatically marked as Preferred.
- 4. In the future, when there is a "preferred" flag for Alt ID, we also would automatically mark the one entered here as Preferred.
- 5. Set PRIMARY IDENTIFIER as the Customer Alt ID Type in plain text as shown in the mocks. If that is not feasible, make it a read-only input.

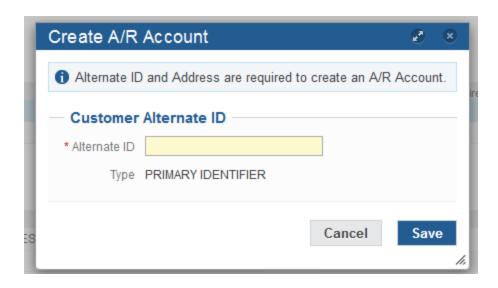
Address and Alt ID Missing. 4.1



Only Address Missing 4.1.a



Only Alt ID Missing 4.1.b



Use Case #4a: User Clicks "Save"

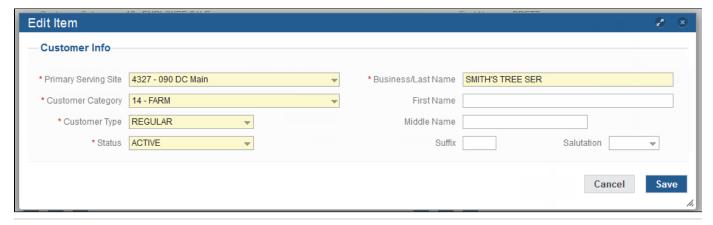
- 1. When user enters valid data and clicks "Save" button here, system will:
 - a. Update data and close modal
 - b. Remove the Cust Charge Tender Restriction
 - c. Create the A/R Account, set value to display "Yes" as seen in Use Case #1.
 - d. Display the same "Successful" notification from Use Case #3.

Use Case #4b: User Clicks "Cancel" or Close

- 1. If user clicks "Cancel" or Close, follow the UI standard for checking for Unsaved Changes.
- 2. If user clicks to Discard Changes, abandon the A/R account creation and close the modal.
- 3. A/R Account remains set to "No" as seen in Use Case #2

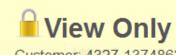
Use Case #5: User Clicks pencil icon next to Customer Info title

- 1. Clicking Customer Info pencil opens modal window so user can edit the Customer Info data. Devs: Use CustomerInfoEdit.html
- 2. Preserve any existing field validations, concurrency and business logic the same as all other SimpleEditFormLayout functionality.
- 3. After entering valid data and clicking "Save", modal window closes and user sees the "Save Successful" notification.



Use Case #6: User is Locked Out from Editing due to Concurrency

1. If data is concurrency locked by Mary, when John clicks the pencil icon next to Customer Info or the "Create A/R Account" button, John will see the standard Concurrency Lock warning notification.



Customer: 4327-1374862 Locked by User: APS. Your access is currently limited to view only.

8

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