



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

JIRA  **RNETUI-3883** - Customer Info should be edited within a modal screen ( Open)

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

Customer

Customer Info




Primary Serving Site: 4327 - ATL8 038 Sandy Plains Business/Last Name: SMITH
Customer Category: 12 - EMPLOYEE SALE First Name: BRETT
Customer Type: REGULAR Middle Name: MICHAEL
Status: ACTIVE Suffix: III Salutation: MR.
A/R Customer: Yes A/R Group: su1 Internal Customer ID: 4327-1374862

Address




Address 1	Address 2	City	State	Type	Preferred	Directions	Delivery Tax	Status
PO BOX 1405		MARIETTA	GA	WORK	<input checked="" type="checkbox"/>			ACTIVE

Phone




Phone	Extension	Type	Device	Preferred
(770) 422-4317		BUSINESS	PHONE	<input checked="" type="checkbox"/>
(770) 422-4317		BUSINESS	FAX	<input type="checkbox"/>

Email

Email Address	Type	Preferred
smithtreesvc@bellsouth.net	WORK	<input checked="" type="checkbox"/>

Customer Alternate IDs

Alt ID	Type
8087	PRIMARY IDENTIFIER

Notes **Activity/History** **Communications**

Use Case #2: Not 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.

Customer

Customer Info

Primary Serving Site: 4327 - ATL8 038 Sandy Plains
 Customer Category: 12 - EMPLOYEE SALE
 Customer Type: REGULAR
 Status: ACTIVE
 A/R Customer: No **Create A/R Account** A/R Group: su1

Business/Last Name: SMITH
 First Name: BRETT
 Middle Name: MICHAEL
 Suffix: III Salutation: MR.
 Internal Customer ID: 4327-1374862

Address

Address 1	Address 2	City	State	Type	Preferred	Directions	Delivery Tax	Status
PO BOX 1405		MARIETTA	GA	WORK	✓			ACTIVE

Phone

Phone	Extension	Type	Device	Preferred
(770) 422-4317		BUSINESS	PHONE	✓
(770) 422-4317		BUSINESS	FAX	

Email

Email Address	Type	Preferred
smithtreesvc@bellsouth.net	WORK	✓

Customer Alternate IDs

Alt ID	Type
8087	PRIMARY IDENTIFIER

Notes Activity/History Communications

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"

Customer

Customer Info

Primary Serving Site: 4327 - ATL8 038 Sandy Plains
 Customer Category: 12 - EMPLOYEE SALE
 Customer Type: REGULAR
 Status: ACTIVE
 A/R Customer: Yes A/R Group: su1

Business/Last Name: SMITH
 First Name: BRETT
 Middle Name: MICHAEL
 Suffix: III Salutation: MR.
 Internal Customer ID: 4327-1374862

Address

Address 1	Address 2	City	State	Type	Preferred	Directions	Delivery Tax	Status
PO BOX 1405		MARIETTA	GA	WORK	✓			ACTIVE

Phone

Phone	Extension	Type	Device	Preferred
(770) 422-4317		BUSINESS	PHONE	✓
(770) 422-4317		BUSINESS	FAX	

Email

Email Address	Type	Preferred
smithtreesvc@bellsouth.net	WORK	✓
stuff@stuff.com	HOME	

Customer Alternate IDs

Alt ID	Type
8087	PRIMARY IDENTIFIER

Notes Activity/History Communications

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** This 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 exists, 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

Create A/R Account

i Alternate ID and Address are required to create an A/R Account.

Customer Alternate ID

* Alternate ID

Type PRIMARY IDENTIFIER

Customer Address

* Address 1

Address 2 In City

Address 3

* City

* State

* Zip

* Country USA

Type

Status ACTIVE

Delivery Tax

Directions

Cancel Save

Only Address Missing 4.1.a

The screenshot shows a 'Create A/R Account' dialog box with a blue title bar. Below the title bar is a light blue information banner with an 'i' icon and the text: 'Alternate ID and Address are required to create an A/R Account.' The main form area is titled 'Customer Address' and contains several fields. The fields for 'Address 1', 'City', 'State', 'Zip', and 'Country' are highlighted in yellow, indicating they are missing or required. The 'Country' field is a dropdown menu currently showing 'USA'. Other fields include 'Address 2', 'Address 3', 'In City' (checkbox), 'Type', 'Status' (dropdown showing 'ACTIVE'), 'Delivery Tax' (dropdown), and 'Directions' (text area). At the bottom right, there are 'Cancel' and 'Save' buttons.

Create A/R Account

Customer Address

* Address 1

Address 2 In City

Address 3

* City

* State

* Zip

* Country

Type

Status

Delivery Tax

Directions

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.



View Only



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

CENTER

ATLANTA

GA

WORK

Sic

UT