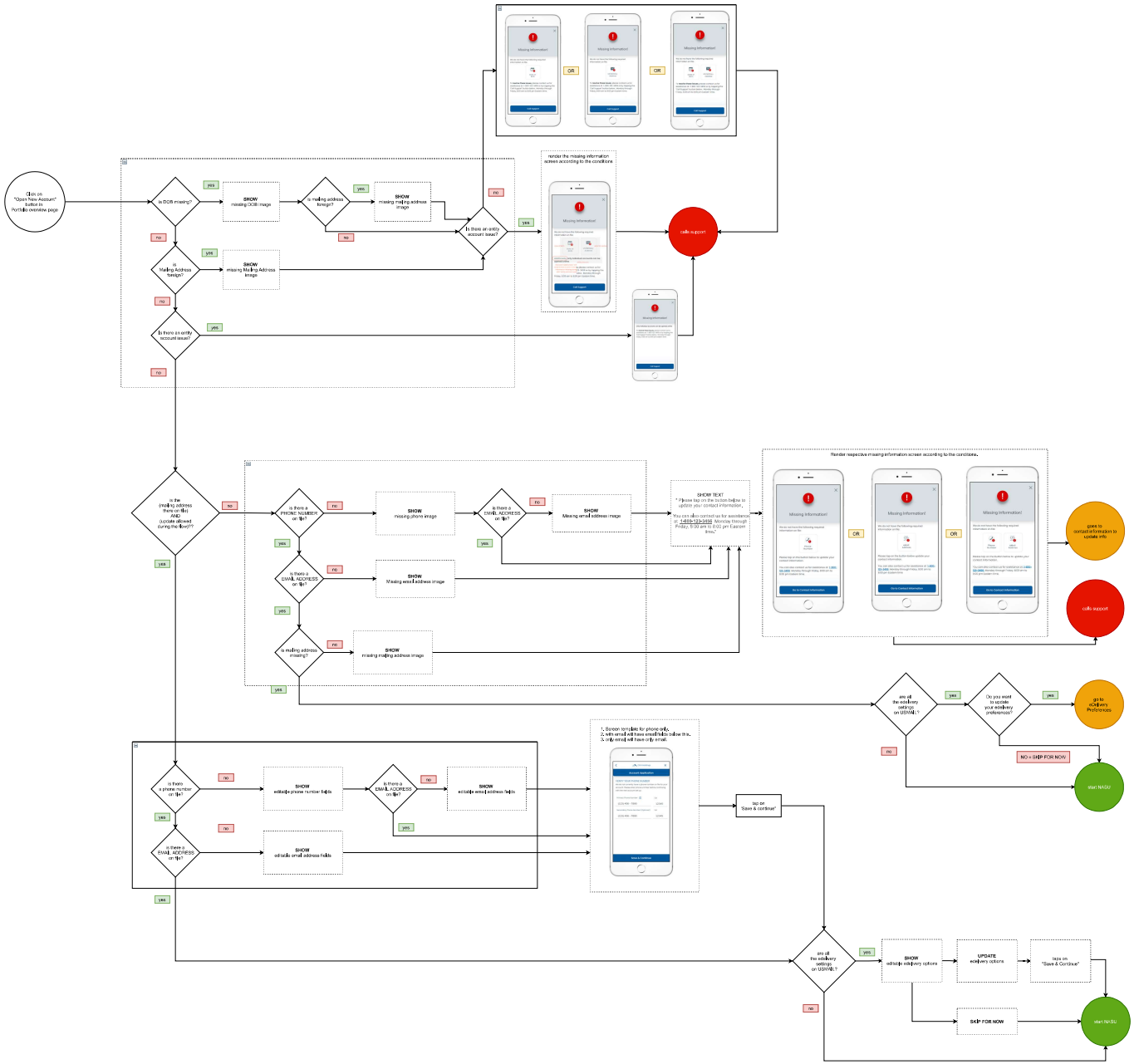
Clicks on "Open New Account" button in Portfolio overview page
is DOB missing?
yes
SHOW missing DOB image
is mailing address foreign?
yes
SHOW missing mailing address image
no
is Mailing Address foreign?
yes
SHOW missing Mailing Address image
no
Is there an entity account issue?
yes
no
render the missing information screen according to the conditions
calls support
OR
OR
is the mailing address there on file AND is update allowed during the flow??
no
yes
is there a PHONE NUMBER on file?
no
SHOW missing phone image
yes
is there a EMAIL ADDRESS on file?
no
SHOW Missing email address image
yes
is there a EMAIL ADDRESS on file?
no
SHOW Missing email address image
yes
is mailing address missing?
no
SHOW missing mailing address image
yes
SHOW TEXT
" Please tap on the button below to update your contact information.
You can also contact us for assistance at 1-855-123-1456 Monday through Friday, 9:00 am to 5:00 pm Eastern time."
Render respective missing information screen according to the conditions.
OR
OR
goes to contact information to update info
calls support
are all the addiivery settings on USHMIL?
yes
Do you want to update your addiivery preferences?
yes
go to addiivery Preferences
NO = SKIP FOR NOW
no
start NASU
is there a phone number on file?
no
SHOW editable phone number fields
is there a EMAIL ADDRESS on file?
no
SHOW editable email address fields
yes
yes
is there a EMAIL ADDRESS on file?
no
SHOW editable email address fields
yes
1. Screen template for phone only,
2. with email will have email fields below this,
3. only email will have only email.
tap on "Save & continue"
are all the addiivery settings on USHMIL?
yes
SHOW editable addiivery options
UPDATE addiivery options
taps on "Save & Continue"
SKIP FOR NOW
start NASU
no