

iConnect 179950 Design Approach

Project Overview

This enhancement will add additional fields to the Preferences section of FireLight and map to the activity to prefill the data, such as an application.

Features/Requirements

- Add new fields to Preferences.
 1. Agent First Name and Last Name
 2. CRD Number
 3. Phone Number
 4. Business Address (separate fields for street, city, state, zip)
 5. Firm Name
 6. Firm Address (separate fields for street, city, state, zip)
- Add a new section in the Preferences for the new fields.
 - Section title = Agent
 - Section order = Add new section “below” General (it will be second section)
 - Field order = *See UI mockup below.*
- Move and relabel the user full name and email address fields.
 - Relabel My Full Name, change to User Full Name.
 - Relabel My Email Address, change to User Email Address.
 - Move both fields to the top of the General Section.
- Move the two checkbox options at the bottom of the General section to the top right side of the section and move the text to appear “after” the checkbox as shown in the mockup.
- Leverage the current logic in the Group Option “Enable Override SSO”, which allows the user to override the entry in the preferences fields. Apply this logic to all new fields added to Preferences.
- Agent common tag data items for the “new” fields are:
 - Agent First Name - Agent_FirstName
 - Agent Last Name - Agent_LastName
 - Agent Phone Number - Agent_Business_PhoneNumber
 - Agent CRD Number - Agent_CRDNumber
 - Firm Name - Agent_FirmName
 - FLI data for Agent Firm Address:
 - Street - Agent_Firm_MailingAddress1
 - City - Agent_Firm_MailingAddress_City
 - State - Agent_Firm_MailingAddress_State
 - Zip - Agent_Firm_MailingAddress_Zipcode
 - FLI data for Agent Business Address:
 - Street - Agent_MailingAddress1
 - City - Agent_MailingAddress_City
 - State - Agent_MailingAddress_State
 - Zip - Agent_MailingAddress_Zipcode

*Please make sure that we do not add new FLI tags for the user full name and user email address. These are in use by all of our clients. Current FLI tags are:

My Full Name - FLI_AGENT_NAME

My Email Address - FLI_USER_EMAIL

- Note that the new Agent_FirstName and Agent_LastName common tags do not get used in email templates. AGENT_NAME is still being used in the email templates.

Use Cases / Workflow Changes

No changes.

Admin Changes

No changes.

UI Mock Ups

General

User Full Name

Bob Johnson

☒ Send Message Center Emails

User Email Address

bobjohnson@johnsonfinancial.com

☐ Use Agent Email for All Communications

Default Jurisdiction

Colorado

Default Product Type

Annuity

Default Time Zone

EST - Eastern Standard Time

Page Size for My App. List

10

Agent

First Name

Paul

Last Name

Adams

Firm Name

Johnson Financial

Business Address :

Firm Address :

Phone Number

303-888-0990

Street

2 Business Rd

Street

200 Firm Street

CRD Number

9-0909

City

Business City

City

Firm City

State

Colorado

State

Colorado

Zip Code

80123

Zip Code

80999

How to Enable and Use This Feature

To use this feature, navigate to the Preferences page within the application and enter data in the Agent fields. Set up a form or wizard with the data items and confirm that the data appears.

You should also see the data filled in the Agent fields in Preferences if the data is passed into FireLight through the SSO in the tx1228.

If you are not using the common tags outlined above on your forms/wizards, you will need to map your data items to the common tags.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		Updated General section; added Agent section. Added data mappings.
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		