iConnect 181092 Design Approach

Project Overview

The goal of this project is to provide a way to set up a default CRM in the FireLight Preferences that allows the form/wizard designer to add a single button onto the form/wizard, which launches the CRM set up in user preferences.

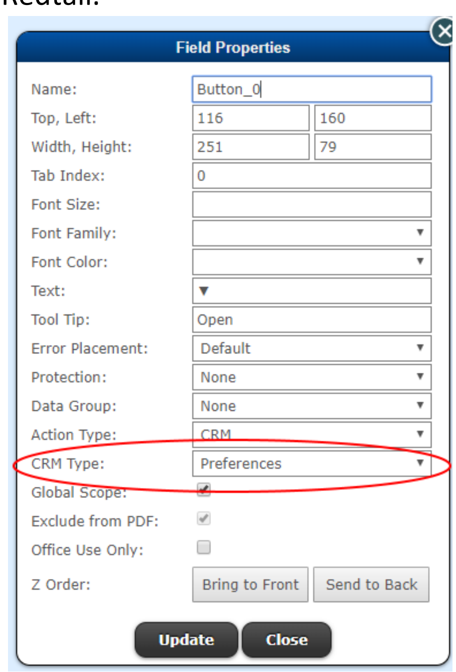
Currently, we have CRM functionality for Redtail, Salesforce, and White Pages. This list is growing. To use this functionality the client needs to add a button for each CRM when designing the form and add rules for the correct button(s) to be shown on the form/wizard.

Features/Requirements

The requirements are separated by Admin Tool changes (shown first) followed by the App changes.

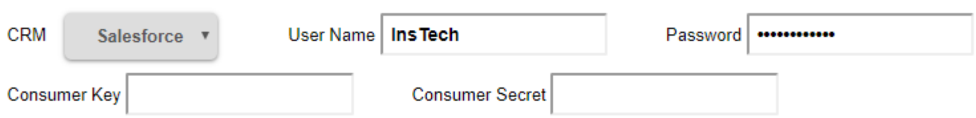
Admin Tool Requirements

1. Leverage existing Group Option “Enable CRM Preferences”. When selected the CRM Preferences section appears in Preferences for the group role code(s).
2. Form and Wizard field properties –
   Note that we need to support backward capability, so the existing logic for the Admin and the Action Type field property option of “CRM” with the “CRM Parameter” field should continue to work as designed.
   a. Rename CRM Parameter to CRM Type and change it to a drop-down list field type.
   b. Add a new CRM Type option named [Preferences]. When the Custom Action button is selected by the user, it launches the default CRM selected in the user preferences, such as Redtail.



c. Clean up the old options (blank, owner, sf_, sf_owner) so it is clear to the end user what CRM system is selected.
   Note: We need to continue to support the existing options per our clients, so we will continue to use the existing strings for the CRM Parameter in code and convert the drop-down list values only. Convert the old string value to the equivalent new one when loading up the Properties dialog, and require selecting a valid option from the list. The mappings are as follows:
      i. Blank or Owner map to “Redtail”.
      ii. Sf_ or sf_owner map to “Salesforce”.
      iii. WP_ or WP_owner maps to “Whitepages”.
d. The dropdown list will contain Preferences, 1035YellowPages, Redtail, Salesforce, Whitepages and Custom.
      i. Show “Preferences” first in the dropdown list followed by an alphabetized list.
e. Several clients have a custom CRM – we need to be sure the existing logic is not affected (clients with a custom CRM to test are HML, PRI, SFG, TRA).

3. Add dataitems for each configuration item entered in the preferences that can be set in a form/wizard.



   a. User name
   b. Password
   c. Consumer Key (Salesforce)
   d. Consumer Secret (Salesforce)
   e. Applies to all new items created for new CRM’s.
4. ***Change checked into 2.12 and merged to 2.13 from KAlons 7/13: need to support both a custom CRM and Redtail for the same organization. I checked in a fix in 2.12 to support Redtail. They need to specify a CRM Parameter of Redtail for that CRM.

Application Requirements

1. Leverage existing Preferences > CRM Preferences section and fields. *Note*: The CRM fields in the preferences are only used to store the CRM credentials.
2. Password update:
   a. Add a mask to the password field (right now it’s blank even though its set, which is confusing).
      i. Note that this applies to “all” fields in the CRM credentials that are password protected. In Salesforce, this includes the Consumer Key and Consumer Secret fields.

3. Add an error message when a Custom Action CRM button is clicked on a form or wizard and it has not been configured in the Preferences. Error text: You must set up your CRM Preferences in the Preferences to see your client list.

Use Cases / Workflow Changes

Admin Changes

Changes to the Admin are shown above in the requirements section.

UI Mock Ups

Changes to the UI are shown above in the requirements section.

How to Enable and Use This Feature

NEEDS TO BE FILLED OUT…To use this feature,

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		
- Inbound Integration		
- Outbound Integration		

- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		