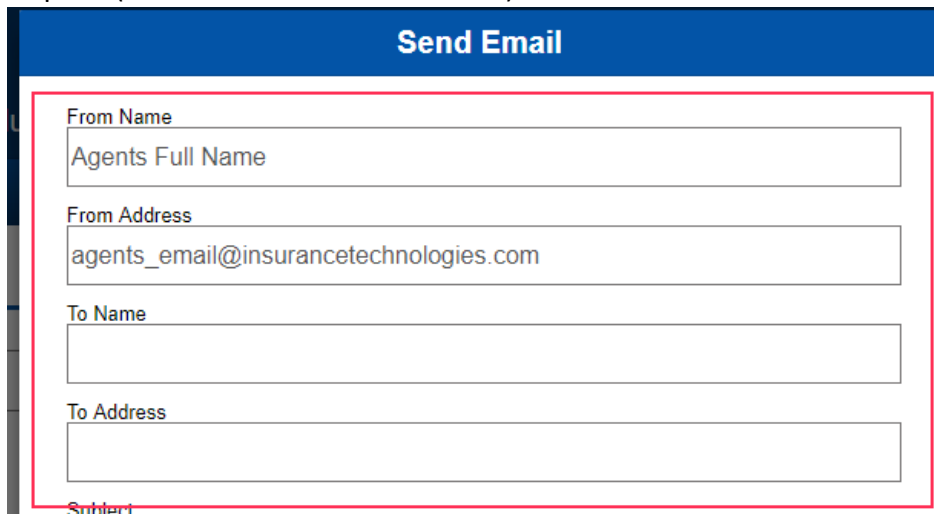# iConnect 189803 Design Approach

Project Overview

The goal of this project is to send the illustration PDF output to an agent via email. The email will contain a link. The PDF will not be attached for security data reasons.
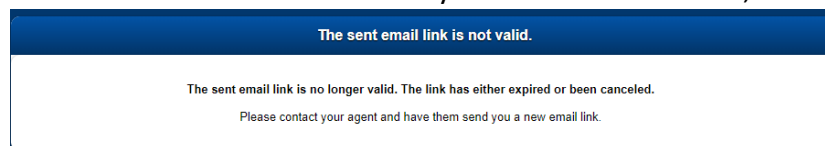
Features/Requirements

1. Applies only to Illustration transactions.
2. Email is designed to be sent to an agent, not a client.
3. Add new Group option to enable and disable this feature (see details in the Admin Tool section below).
4. Email format will be a FireLight email with blank [Send to] when opened (no CMR integration). The [From] email address will be what the sender types into the email request (defaults to Preferences email).

5. Add button labeled [Send Email] to navigation bar in an open illustration activity.
   a. Need to determine icon. Suggestion from font awesome (searched off email)

    Envelope.
   b. Disable if any validation errors (similar to Illustrate and Print).
6. Send Email event generates secure email with a link to the illustration PDF output.
   a. Add new Group option to set an expiration for the email (see details in the Admin Tool section below).
   b. Link is valid for the number of days set in the Admin tool, and then it expires.

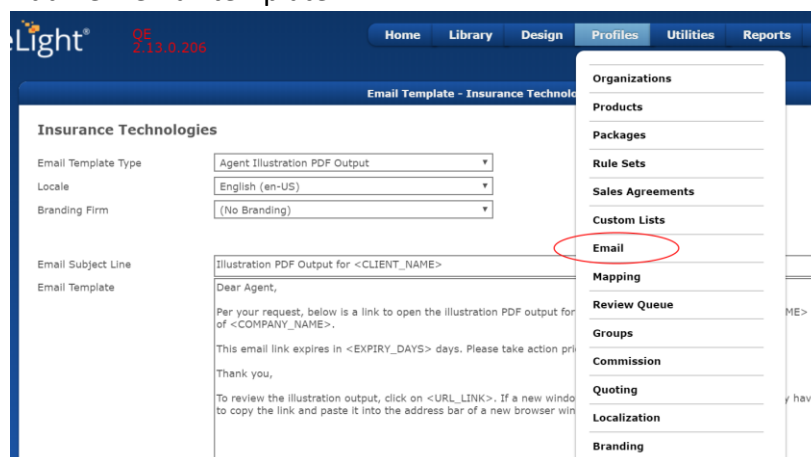   i. Clean up PDF output files when email link expires.

7. When the email is generated, the calculation engine runs and the PDF is generated and stored with the saved illustration.
   a. When the email link is clicked, it opens the saved associated PDF output in the browser. No UI options are available.
   b. There is no limit to the number of emails / variations that can be sent with a single illustration (e.g. sales desk person keeps changing inputs in the same illustration to generate emails with link to output).
8. Use existing save logic today in the illustration.
9. Add email template (see details in the Admin Tool section below).
10. When illustration is opened, add an option to Other Actions menu to retrieve the sent emails (see UI Changes and Mockups section below).
11. Add audit entries (see UI Changes and Mockups section below).

Admin Tool Changes

1. Add two new Group options – Admin Tool, Profiles, Groups. Please put the two options together.

App Only	Admin Only	Review Queue Only	Product Access	Case Access	Review Queue Access	Needs Filter	Activity

Illustration

☑ Enable Illustration Send Email

Illustration Email Expiration [3 ▾] days

   a. If 'Enable Create Illustration' is not selected in App Only tab, then do not show these options.
   b. Enable Illustration Send Email – if selected, enables the [Send Email] button in the navigation bar of the open illustration (next to Print).
   c. Illustration Email Expiration – sets an expiration for the email. Add as a dropdown list with choices of 1 thru 7 days, default 3 days. This option is enabled when 'Enable Illustration Send Email' is selected. If set to 3 days, it expires on day 3. For example, email is sent on Monday at 3PM (day 1), then it expires on Thursday at 3PM (3 days later).
2. Add new email template.

a. Allow sender to modify the template text.
b. Calculate expiration date for email template.
c. Email template format:

Email Template Type: Agent Illustration PDF Output

Email Subject Line: Illustration PDF Output for <CLIENT_NAME>

Email Template:

Dear Agent,

Per your request, below is a link to open the illustration PDF output for <CLIENT_NAME> on the <PRODUCT_NAME> of <COMPANY_NAME>.

This email link expires on {mm/dd/yyyy}. Please take action prior to the expiration.
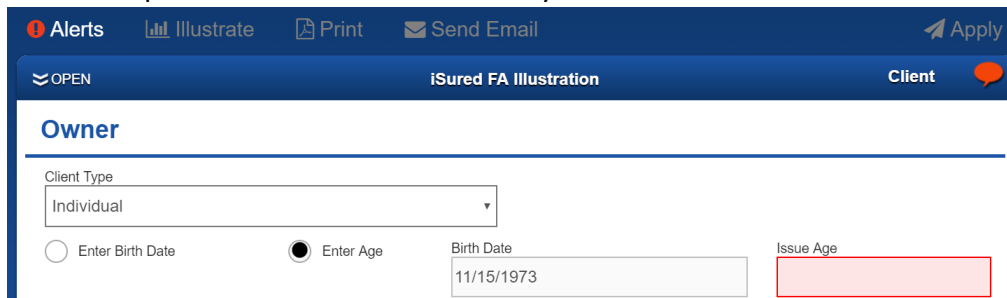
Thank you,

To review the illustration output, click on <URL_LINK>. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of a new browser window.
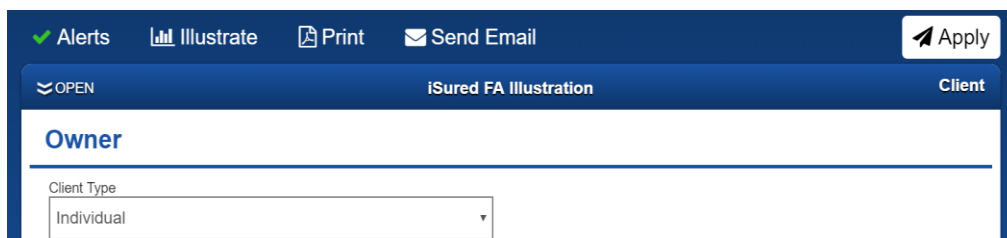
d. Client_Name is not automatically mapped since the client may be the owner, or the annuitant, or the insured. You will need to write a rule to fill the value. For example, it may be based on Insured_FullName for life products and Owner_FullName for annuity products.

UI Changes and Mock Ups

1. Add button labeled [Send Email] to navigation bar in an open illustration activity. Below are mockups of it disabled if there are any Alerts and enabled when no Alerts.
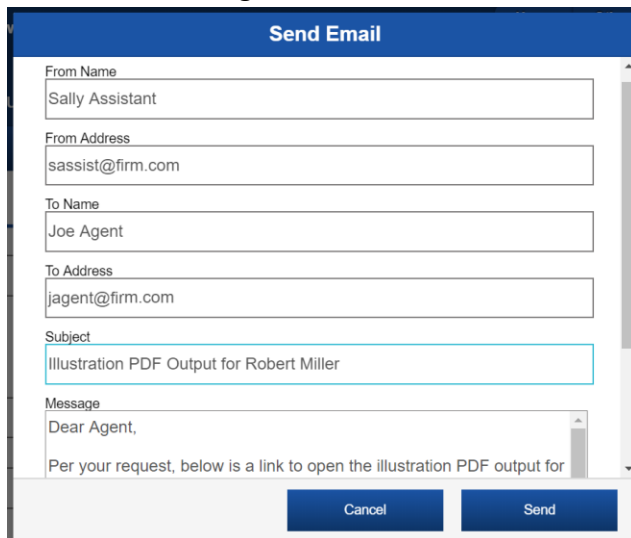
2. Send Email event generates secure email with a link to the illustration PDF output.

3. Add an option in Other Actions, Sent Emails to review the sent emails.
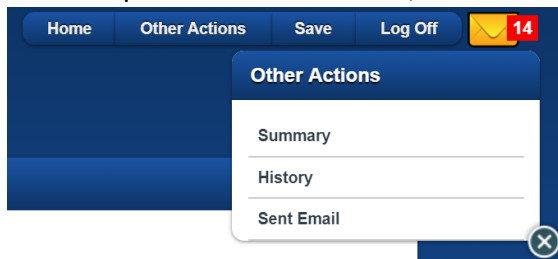
    a. Do not show the menu option if 'Enable Illustration Send Email' is not selected.

    b. Disable menu option if no active Sent Emails exist.

    c. This will contain each email request that is not expired or canceled sent with the illustration.
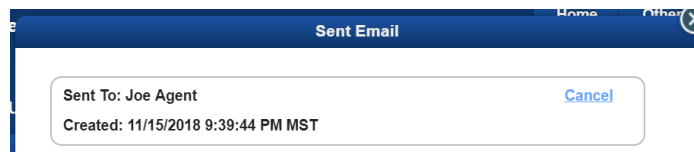
    d. Add ability to view PDF output.

    e. Add method to cancel email sent to agent. Also, provide confirmation dialog.
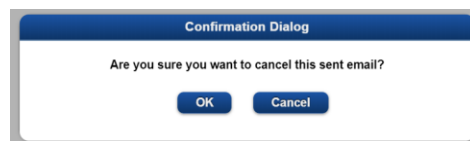
        i. No cancelation email is sent when the Sent Email request is canceled.

4. Capture errors and add messages:

    a. When link is clicked after it has been canceled, generate error and message.

    b. If link is expired, generate error and message.

    c. If illustration no longer exists (deleted or purged), generate error and message.

    d. Generic error text: This illustration request is no longer valid. Please request a new illustration.

5. Add audit entries:
    a. Add audit when email is sent.

History	
Data Entry	'Sally Assistant' sent an email containing a link to the illustration PDF output to 'Joe Agent' at address 'jagent@firm.com'.
Agent Email Sent	
11/15/2018 2:39:44 PM MST	
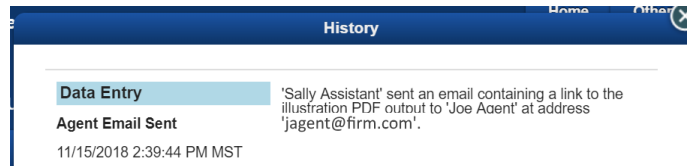
       i. Goes with Data Entry Display Status. Audit name: Agent Email Sent.
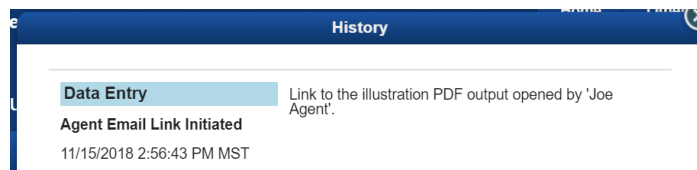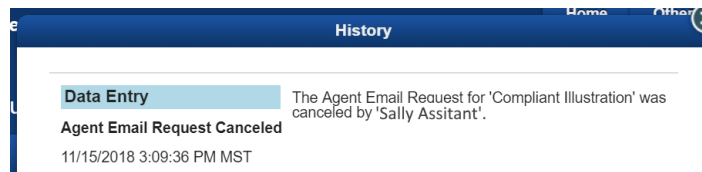   ii. Text: 'Sender Name' sent an email containing a link to the illustration PDF output to 'Receiver Name' at address 'email@abc.com'.
   b. Add audit when link is clicked.

History	
Data Entry	Link to the illustration PDF output opened by 'Joe Agent'.
Agent Email Link Initiated	
11/15/2018 2:56:43 PM MST	

       i. Goes with Data Entry Display Status. Audit name: Agent Email Link Initiated.
       ii. Text: Link to the illustration PDF output opened by 'Receiver Name'.
    c. Add audit if canceled.

History	
Data Entry	The Agent Email Request for 'Compliant Illustration' was canceled by 'Sally Assitant'.
Agent Email Request Canceled	
11/15/2018 3:09:36 PM MST	

       i. Goes with Data Entry Display Status. Audit name: Agent Email Request Canceled.
       ii. Text: The Agent Email Request for 'Receiver Name' was canceled by 'Sender Name'.
    d. Add audit when email link expires.

History	
Data Entry	The Agent Email Request for 'Joe Agent' has expired.
Agent Email Link Expired	
11/18/2018 12:00:04 AM MST	
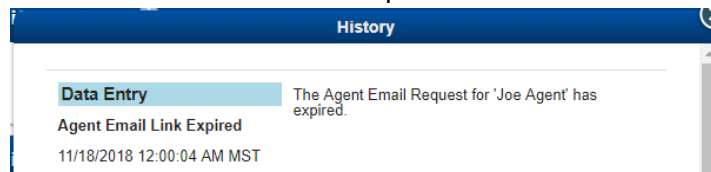
       i. Goes with Data Entry Display Status. Audit name: Agent Email Link Expired.
       ii. Text: The Agent Email Request for' Receiver Name' has expired.
       iii. This will not be at the actual time it expires. *Kyle to look at this*.
    e. Audit entry applies to each event (e.g. if two emails are sent, both are recorded).

Use Cases / Workflow Changes

1. Assistant to Agent:
    a. Log in as assistant.
    b. Create illustration, save it.
    c. Click [Send Email] and sent it to the agent. Update the email text and send.
    d. Agent gets email.
    e. Click on email link – see PDF output and saves or prints.

2. Sales Desk to Agent:
    a. Log in as sales desk.
    b. Create illustration, save it.
    c. Click [Send Email] and sent it to the agent. Update the email text and send.
    d. Repeat steps to send to several agents.
    e. Each agent gets email.
    f. Each clicks on email link – see PDF output and saves or prints.

Testing Acceptance Criteria

1. Test 'Enable Illustration Send Email' option enable / hide by Group option setting.
2. Test all transactions – make sure [Send Email] button only appears in illustration activities.
3. Test [Send Email] button is not active when illustration has validation errors.
4. Test expiration – make sure email link is active for set number of days in the Group option then it expires. For example, if set to 3 days, then it should expire 3 days later.
5. Test cancel – make sure it is canceled. Make sure email link shows correct error message on canceled request.
6. Test multiple sends – make sure correct output opens with corresponding link.
7. Test deleted and purged illustrations, make sure link does not work; get correct error message.
8. Test email template, make sure you can change the text.
9. Test Other Actions, Sent Emails in open illustration for single email; test for multiple emails.
    a. Make sure expired and canceled do not appear.
10. Test active email link on illustration that is locked with application in signatures.
11. Verify audits for a single email based on requirements. Verify for multiple emails within a single illustration.
12. Copy an illustration with pending email requests – Copy as is, Copy with Changes. Make sure the Sent Emails are cleared out and there is no history associated with previous emails.
13. Make sure [Send Email] does not appear in the console (note that wizards do not apply to the console at this point in time).

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		2 new Group options.
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		New email template.
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		