

# iConnect 147639 Application Complete & Submit Reminder Email

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## Project Overview

Add functionality to send an automatically generated email to the agent and/or reviewer when the application has been submitted. Currently the final submit email is only sent to the client and any parties who have completed the signing ceremony. This functionality would allow the reviewer to be notified when the reviewed application has been submitted by the agent. The agent would also receive the notification that the application process has been completed. Additional email template tags for the confirmation number and client name will be added to allow for easier case identification on the completed email. An option to send a reminder to agents to submit the application after the app has been signed can be added through an organization setting. The organization will be able to choose between a daily or weekly reminder, with the default option being never.

## Features/Requirements

- Group option—‘Enable Submit Email for Agent’-- added to allow the option to be enabled by group role code
- Group option—‘Enable Submit Email for Reviewer’-- added to allow the option to be enabled by group role code
- The group option ‘Disable Email After Submit’ will disable the final submission email for only the interested parties with a client role—the ‘Enable Submit Email for Agent’ and ‘Enable Submit Email for Reviewer’ will work independent of the ‘Disable Email After Submit’
- Email template—‘Agent Completed Application’-- for Agent final submit email with notification that process has been completed
- Email template—‘Reviewer Completed Application’-- for Agent final submit email with notification that process has been completed
- Ability to customize the agent email template and the reviewer email template in the Admin Email Template tab under Profile Administration
- Final email sent to the agent and/or any manual reviewers for the application after the agent has submitted the app
- Clients will continue to receive the ‘Download Completed Application’ with the url link for FireLight to allow them access to the PDF of the completed application if the option to ‘Disable Email After Submit’ has not been checked
- The email tags for <FLI\_CONFIRMATION\_NUMBER> and <CLIENT\_NAME> will be added for template replacement values for the complete email. It will make use of the values set in the application search items stored by request.
- Organization option for ‘Submit Reminder Frequency’ to allow organizations to set the frequency of a reminder email to submit an application. Options will include: Never, Daily, Weekly.
- Submit reminder emails will run on the scheduler. The reminder will be sent at intervals from the time of the application reaching the Pending Approval status or after the signatures have been completed.

For example, if the reminder frequency is set at daily, the reminder email would be sent to the agent daily after the application all of the signatures have been completed. Default setting is 'Never'.

- Template 'Submit Reminder' added for customizing the submit reminder email with the <MESSAGE> tag and <AGENT\_NAME> tags available for use. The message tag will populate the email with the list of applications ready to be submitted. The application name, policy number, and client name, if available in application search items, will be listed when the <MESSAGE> tag is added to the email template.

## Use Cases / Workflow Changes

Agent completes the application and sends the reviewers a request to review the app in the manual review workflow. The reviewer completes the review process and the agent receives an email notification that the application has been approved/declined. If the application has been approved, the agent logs into FireLight and submits the application by clicking the 'Continue' button in the application view. The final submission email is then triggered. The clients who entered an email in the client verification screen or external sign process will receive the 'Download Completed Application' (if the option to 'Disable Email After Submit' is not selected). The agent and any reviewers for the application will receive the 'Completed Application' email (if the options to 'Enable Submit Email for Agent' and/or 'Enable Submit Email for Reviewer' are selected).

The Submit Reminder email will be sent if the application has completed the signing ceremony for all signers, but the application has not been submitted. The frequency of the email will be based on the option selected in the 'Submit Reminder Frequency' drop-down on the organization tab in the Admin tool. For example, if Daily is selected, the agent will receive an email a day after the application has completed the signature process.

In order to make use of the new template replacement tags, <FLI\_CONFIRMATION\_NUMBER> and <CLIENT\_NAME>, a request must be made to IT to add these values to Application Search Items stored for each application. The <CLIENT\_NAME> tag also requires a dataitem of the same name to be added to the application and set to the name of the signer wanted for the replacement value. For example, to set it to the owner name, a rule would be added to the form:

```
<if>
  <condition>
    <not>
      <isnullorwhitespace>
        <diget dataitemid="Owner_FullName" />
      </isnullorwhitespace>
    </not>
  </condition>
  <diset dataitemid="Client_Name">
    <diget dataitemid="Owner_FullName" />
  </diset>
</if>
```

## Admin Changes

- Group option added for 'Enable Submit Email for Agent'
- Group option added for 'Enable Submit Email for Reviewer'
- Organization drop-down menu added for 'Submit Reminder Frequency'
- Email template added for 'Agent Completed Application'
- Email template added for 'Reviewer Completed Application'
- Email template added for 'Submit Reminder'
- Email is sent from organization email address rather than the agent email address for the agent and reviewer final submit emails
- The following email replacement tags can be used in the 'Agent Completed Application', 'Reviewer Completed Application':
  - <APPLICATION\_NAME>
  - <PRODOUCT\_NAME>
  - <COMPANY\_NAME>
  - <AGENT\_NAME>
  - <REVIEWER\_NAME>
  - <FLI\_CONFIRMATION\_NUMBER>
  - <CLIENT\_NAME>
- The 'Submit Reminder' email template will use the <AGENT\_NAME> and the <MESSAGE> tags
- The <MESSAGE> tag will list the applications ready to be submitted in the generated email. It will include the application name, policy number, and, if available in the application search items, the client name.

## App Changes

- Trigger added for 'Agent Completed Application' and 'Reviewer Completed Application' emails when application has been submitted
- Trigger added for 'Submit Reminder' email when application has been reviewed, but not yet submitted

## Integration Changes

N/A

## UI Mock Ups

*Admin Tool- Group options to enable the final submit email for agents and reviewers*

App Only	Admin Only	Review Queue Only	Product Access	Case Access	Revi
<input type="checkbox"/> Disable Delete Application	<input type="checkbox"/> Disable Decline E-Sign				
<input type="checkbox"/> Disable View Requests	<input type="checkbox"/> Require Signature Capture				
<input type="checkbox"/> Disable Copy Application	<input type="checkbox"/> Require Mobile Verification				
<input type="checkbox"/> Disable View Documents	<input type="checkbox"/> Disable Editing Other Users' Applications				
<input type="checkbox"/> Disable Save Application	<input type="checkbox"/> Enable Use Screen Notification				
<input type="checkbox"/> Disable View Application	<input type="checkbox"/> Enable Test Mode				
<input type="checkbox"/> Disable View Application Summary	<input type="checkbox"/> Enable Override Date				
<input type="checkbox"/> Disable Edit Preferences	<input type="checkbox"/> Enable Cc Sender In All Requests				
<input type="checkbox"/> Disable Email After Submit	<input type="checkbox"/> Enable Single User to Sign Multi Signer Types				
<input checked="" type="checkbox"/> Enable Submit Email for Agent	<input type="checkbox"/> Require Entry of Application Name				
<input checked="" type="checkbox"/> Enable Submit Email for Reviewer	<input type="checkbox"/> Allow Not In Good Order Submittals				
<input type="checkbox"/> Disable Signing as Client	<input type="checkbox"/> Disable Console For Group				

*Admin Tool-  
Submit  
Reminder*

*Frequency set at the organization level with the options: Never, Daily, Weekly*

Organization Name	Insurance Technologies
Organization Type	Carrier ▼
Country	USA ▼
DTCC Member ID	6407
Full Settling DTCC Member	<input type="checkbox"/>
Company Rating	1
External Map Code	IT
App Signout URL Type	ThankYou ▼
App Site Signout URL	ThankYou
Shared Key	FireLight#123
Support Email	Email@Go.com
Deployment Notification Email	
Data Partition	ALL
Edit Masks <a href="#">Add</a>	None ▼
Default Validation Placement	Top ▼
Submit Reminder Frequency	Daily ▼
Signature Fonts	<a href="#">Click to Edit</a>
Purge Uncompleted Apps	<input type="text" value="121"/> days
Purge Completed Apps	<input type="text" value="121"/> days
Expiration Warning Threshold	<input type="text" value="0"/> days (0 for never)

*Admin tool- Completed Application email templates for Agent and Reviewer in Email tab for customization*

Email Template Type	Agent Completed Application ▼
Email Subject Line	Application Completed
Email Template	<p>Dear &lt;AGENT_NAME&gt;,</p> <p>Thank you for using the e-application process for '&lt;PRODUCT_NAME&gt;' of &lt;COMPANY_NAME&gt;. The application has now been submitted.</p>

Email Template Type	Reviewer Completed Application ▼
Email Subject Line	Application Completed
Email Template	<p>Dear &lt;REVIEWER_NAME&gt; ,</p> <p>Thank you for using the e-application process for '&lt;PRODUCT_NAME&gt;' of &lt;COMPANY_NAME&gt;. The application has now been submitted.</p>

*Admin tool- Submit reminder email template for Agent in Email tab for customization*

Email Template Type	Submit Reminder ▼
Email Subject Line	Application Submission Reminder
Email Template	<p>Dear &lt;AGENT_NAME&gt; ,</p> <p>The following applications are ready for submission: &lt;MESSAGE&gt;</p>

## How to Enable and Use This Feature

- In the Admin group options tab, click the box to enable the feature- 'Enable Submit Email for Agent' and 'Enable Submit Email for Reviewer'
- Modify the 'Agent Completed Application' and 'Reviewer Completed Application' templates as desired in the Email tab under Profile Administration in the Admin tool
- Request new application search items to be saved for each application for email template tags <FLI\_CONFIRMATION\_NUMBER> and <CLIENT\_NAME>
- Add a rule to the form to set a dataitem for Client\_Name. If policy number is not being set in the provider, a dataitem can also be added to the form to set the value for <FLI\_CONFIRMATION\_NUMBER>.
- Create an application in the App Portal and complete to 100%. If the option 'Allow E-Approval' is turned on in the Organization tab of the Admin, proceed to the request for manual review

- After completing the manual review process, if the option to submit automatically ('Submit on ALL Reviewer Approval' and 'Submit on ANY Reviewer Approval') is not turned on in the Organization tab in the Admin tool, then re-enter the application and click the continue button to submit the application
- Emails to manual reviewers and agents will be triggered after the application submits- verify correct emails were sent to each
- Submit reminder email to agent will be triggered after the time interval set in the Submit Reminder Frequency in the organization tab. For example, if the frequency 'Daily' is selected, the reminder email will be sent to the agent daily after the signature process has been completed for all signer, but not yet submitted.

## Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
- <b>Form Library</b>		
- <b>Design Forms</b>		
- <b>Profile Administration</b>	x	-Group option added for 'Enable Submit Email for Agent' -Group option added for 'Enable Submit Email for Reviewer' -Email template 'Agent Completed Application' added to Email tab -Email template 'Reviewer Completed Application' added to Email tab -Organization option added for 'Submit Reminder Frequency'
- <b>Reports</b>		
- <b>Deployment</b>		
<b>FireLight App</b>		
- <b>New Application</b>		
- <b>Edit Application</b>		
- <b>Signature Process</b>		
- <b>Review Queue</b>		

- <b>Manual Review</b>		
- <b>User Preferences</b>		
- <b>Inbound Integration</b>		
- <b>Outbound Integration</b>		
- <b>PDF Generation</b>		
- <b>Email System</b>	x	<p>Auto triggered email added for completed application- sent to agent and/or manual reviewers</p> <p>New email template tags using the application search items- &lt;FLI_CONFIRMATION_NUMBER&gt; &lt;CLIENT_NAME&gt;</p> <p>&lt;MESSAGE&gt; tag containing app name, policy number, and if available, client name for the submit reminder email</p>
<b>FireLight Console</b>		
- <b>Windows</b>		
- <b>iOS</b>		
<b>Other Systems</b>		
- <b>DTCC Integration</b>		
- <b>Commission Netting</b>		
- <b>Activity Reporting</b>		