

iConnect 106534 Design Approach

Add new branding ability to firelight specifically back office access to the branding and email being specific to the branding.

Workflow Changes

No workflow changes will take place.

Features/Requirements

BrandingId will be stored as a dataitem in the formdata at time of the application creation. This means once an application is created it will be locked to that branding.

Email functionality will be modified to allow for custom emails per branding.

All other requirements of Iconnect 106534 are already fulfilled by previously branding changes in 2.6

Admin Changes

The Branding page will be modified to allow selection of branding for email text.

App Changes

To enable branding “?branding=<Branding>” must be pass in the passive call url to enable branding.

Where <Branding> is replaced with the actually branding code. The Branding will be stored in the “FLI_BRANDING_ID”

UI Mock Ups

For the Branding email template designer there will be added a new combo box for selecting the branding.

Custom Branding for Insurance Technologies

[View/Modify All UI Items](#)
[Add or Update Sub/Firm Brand](#)

Email Templates	▼	Default	▼	<input type="text"/>	<input type="button" value="Save Changes"/>
Key	UI Text				
16 - OSJ Rejection Message	This submitted application has been rejected and was not released to the carrier. To Resubmit: 1.Copy App 2. Make Corrections 3. Resubmit App. See rejection reasons noted below.				
15 - OSJ Approve Message	This application has been processed and approved by the reviewer and has been released to the carrier. Please contact the carrier if you have any further questions about the status of this application.				
14 - Revoke User Share	{0} has revoked your ({1}) application access request originally sent on {2}.				
13 - Accept User Share	{0} Accepted your eApp application share request.				
12 - User Share Request	Dear {0}, I would like to grant you ({1}) access to view my electronic applications. Click on this link to accept this share request. {2} Sincerely, {3}				
11 - Review Request Passcode Email Template	The Passcode For the Recent Request is <PASSCODE>				
10 - Review Queue Email	Dear Reviewer, The Following Case <CASE_NAME>, is now available for review on Queue Name <QUEUE_NAME>. Please Login to Firelight on your earliest convenience to review.				
9 - Message Center Notification	The following message was posted to the FireLight Message Center. Application Name: <APPLICATION_NAME> Message: <MESSAGE>				
8 - Client signed and declined the application Email Template	Client <CLIENT_NAME> has declined to sign the application <APPLICATION_NAME> in <CITY_NAME> at <DATE_TIME>.				
7 - Client signed and approved the application Email Template	Client <CLIENT_NAME> has signed and approved the application <APPLICATION_NAME> in <CITY_NAME> at <DATE_TIME>.				
6 - Reviewer declined the application Email Template	Reviewer <REVIEWER_NAME> has declined the application <APPLICATION_NAME> at <DATE_TIME>.				
5 - Reviewer approved the application Email Template	Reviewer <REVIEWER_NAME> has approved the application <APPLICATION_NAME> in <CITY_NAME> at <DATE_TIME>.				
4 - Download Completed Application Email Template	Dear <CLIENT_NAME>, Thank you for applying for '<PRODUCT_NAME>' of <COMPANY_NAME>. To download or print the completed application, please click on the link at the bottom of the email. You will be asked for your birth date and the last 4 digits of your social security number. If you have questions please feel free to contact me. Sincerely, <AGENT_NAME> To download or print your completed application, click on <URL_LINK>. Enter the last 4 digits of your SSN, and birth date. If a new window does				
2 - Request Client to Fill Application Email Template	Dear <CLIENT_NAME>, Thank you for applying for '<PRODUCT_NAME>' of <COMPANY_NAME>. In order to complete your electronic application, please click on the link at the bottom of the email. You will be asked to acknowledge your acceptance of the disclosure terms and consents. Please use your birth date and the last 4 digits of your SSN to login. If you have questions please feel free to contact me. Sincerely, <AGENT_NAME> To view and complete your application, click on <URL_LINK>. enter the last 4				
1 - Review Request Email Template	Dear <REVIEWER_NAME>, Please review the following client's application for '<PRODUCT_NAME>' of <COMPANY_NAME>. Click on the link at the bottom of the email to review and approve the application. You will be asked to acknowledge your acceptance of the disclosure terms and consents. The instruction for completing your 'Electronic Signature' will be provided as well. Please use the Passcode to login. I will be providing this Passcode via phone or a separate email. If you have questions please feel free to contact				
0 - Signature Request Email Template	Dear <CLIENT_NAME>, link here http://firelight.insurancetechnologies.com/EGApp link here Thank you for applying for '<PRODUCT_NAME>' of <COMPANY_NAME>. Use the link included at the bottom of the email to to start the signing process. You will be asked to acknowledge your acceptance of the disclosure terms and consents. The instruction for completing your 'Electronic Signature' will be provided as well. Please use your birth date and the last 4 digits of your SSN to login. If you have any questions				

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		
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FireLight Console		
- Windows O/S		
- iOS		
- Android		
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Other Systems		
- DTCC Integration		
- Commission netting		
- Activity Reporting		