

iConnect 118048 (Update Product) Design Approach

This iconnect item has two request. This document describes second request which is - automatically switch an active application over to a new product.

Workflow Changes

There is no change in normal workflow of the system in implementing this request.

Features/Requirements

- Switch an Active application over to a new product, if sales agreement expiration date is set and a replacement product exists on Sales Agreement page.

Admin Changes

- “Replace Product” field (Drop-down) will be added on Sales agreement page which is used to select new product.
- “Replace Product” drop-down will be enabled only when there is a value in “End” field i.e. when user set expiration date of sales agreement.
- “Replace Product” drop-down will show products with same annuity type of expiring product.
- “Replace Product” drop-down will show products with sales agreement set to true.

App Changes


- When an active application is opened then system will check the sales expiration date on the SA and if it is expired and a replacement product exists, switch over to the new product, change all of the forms, package, etc.
- A notification given to user that due to expiration of product, application is switched to a new product.

Assumption

- We assume that the replacement product will have the same jurisdiction list approval as the current product.

UI Mock Ups

Only Admin -> Sales Agreement page will be modified. A new field "Replace Product" will be added on Sales Agreement page.



Sales Agreements

Product ▼	Agreement ▼	
A2Z Product	True	X
Corporate Forms test	True	X
dddd	False	X
Dev Test Product	True	X
Empty Product	True	X
FSE DI Product	True	X
FSE FA Product	True	X
FSE LTC Product	True	X
FSE LIL Product	True	X

Sales Agreement of "Insurance Technologies" for product "A2Z Product"

Selling Org Insurance Technologies ▼

Product Name A2Z Product kk

More Info

Start **End**

Time Zone ▼

Replace Product --Select product to replace-- ▼

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Available Packages

Weihong Test Package
Application - Package 1

 PBRCTEST-56
Application - Package 1

 Variable Annuity Two
Application - Package 1

 AA Pack
Application - Package 1

 401
Application - Package 1

 UL Test Package
Application - Package 1

 Empty
Application - Package 1

 SSSS
Application - Package 1

 PBRCTEST-34
Application - Package 1

 401K Package
Application - Package 1

Assigned Packages

App Package
Application - Package 1

 ws Test Package
Application - Package 1

State Approvals
Back Office Script
Options

State	Approved
Alabama	✓
Alaska	✓
Arizona	✓
Arkansas	✓
California	✓
Colorado	✓

☒ Check/Uncheck All

Save Sales Agreement

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration - Sales Agreement	Yes	A new field (“Replace Product”) will be added on Profile - > Sales Agreement. Add/Update feature affected on Sales Agreement page. One new column will be added to SalesAgreement table that will hold replacement product.
- Reports		
- Deployment		
FireLight App		
- New Application	Yes	Check for product expiration and hide expired product.
- Edit Application	Yes	When loading active application, we need to check sales agreement end date and if it expired, we need to replace it with new product. New product will contains new package, new forms and new field/rules. These new changes saved in database when user click on “Save” button in his application. Notification will show to user about product replacement.
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		

FireLight Console	Yes	Only notification will be shown to user about replacement of product. No other change need to be done as most of the changes belong to shared.
- Windows O/S		
- iOS		
- Android		
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Other Systems		
- DTCC Integration		
- Commission netting		
- Activity Reporting		