

# iConnect- 117078 Autofill in Email Requests

## Workflow Changes

No changes needed.

## Features/Requirements

### Email for Signature Requests

- Client name would be pre-filled for selected signer using mapped full name field or concatenation of fields for first, middle, last name.
- Client email address would be pre-filled for selected signer using mapped email field.
- Client 4 digit SSN would be pre-filled for selected signer using mapped 4 digit SSN field or substring of full SSN field.
- Client birthdate would be pre-filled for selected signer using mapped birthdate field or concatenation of fields for birth month, day, and year.
- Your name and your email fields will remain status quo, pre-filling with name and email address entered in the user preference screen if used.
- Client name in template will update with pre-filled name as it does with manually entered name.

### Email for Client Fill Requests

- Signer type drop-down control added to allow user to select the signer to be used in mapping pre-filled fields
- Signer drop-down options include only signer types which are currently active on the form and exclude the agent signer type.
- Client 4 digit SSN would be pre-filled for selected signer using mapped 4 digit SSN field or substring of full SSN field.
- Client birthdate would be pre-filled for selected signer using mapped birthdate field or concatenation of fields for birth month, day, and year.
- Recipient Name and Recipient Email fields will not pre-fill with mapped form fields.
- Your name and your email fields will remain status quo, pre-filling with name and email address entered in the user preference screen if used.

## Admin Changes

No changes needed. Mapped fields must be updated in the Admin Mappings tab to provide the correlated Form Data ID for the FireLight System Data ID.

## App Changes

### Email for Signature Requests

- Addition of logic to map the form field or fields for client name to the 'Client Name' field on the email request screen and the generated email request.
- Addition of logic to map the form field for client email address to the 'Client Email' field on the email request screen and the generated email request.
- Addition of logic to map the form field or fields for SSN to the 'Client Last 4 Digits of SSN' field on the email request screen and the encrypted SSN for re-entry into FireLight.
- Addition of logic to map the form field or fields for Birthdate to the 'Client Birth Date' field on the email request screen and the encrypted birthdate for re-entry into FireLight.

### Email for Client Fill Requests

- Drop-down control added to enable user to select signer type to use for pre-filled data values.
- Signer types filtered to include only enabled signer types on form and to exclude agent signer type.
- Based on the user's signer type selection, logic added to map the form field or fields for SSN to the 'Client Last 4 Digits of SSN' field on the email request screen and the encrypted SSN for re-entry into FireLight based on the user's signer type selection.
- Based on the user's signer type selection, logic added to map the form field or fields for Birthdate to the 'Client Birth Date' field on the email request screen and the encrypted birthdate for re-entry into FireLight.

## UI Mock Ups

### Email Request for Signatures with client information pre-filled from mapped form fields



**Send Email To Client To Request Signatures**

Your client will receive an email message with instructions to complete the electronic application process.

Client Name:	<b>Bob S. Sullivan</b>	Subject:	<b>Mine - DI - Fully Underwritten - Please complete your signat</b>
Client Email:	<b>bsullivan@gmail.com</b>		Use the link included at the bottom of the email to to start the signing
Your Name:	<b>Joe Agent</b>		Please use your birth date and the last 4 digits of your SSN to login.
Your Email:	<b>agent@insurancetechnologies</b>		If you have any questions please feel free to contact me.
* Client Last 4 Digits of SSN:	<b>2222</b>		Sincerely,
* Client Birth Date:	<b>11/11/1955</b>		Joe Agent

\* These values will not show in email.

Message: To sign your application, click on [URL\_LINK], enter the last 4 digits

### Email Request for Client Fill with client information pre-filled from mapped form fields for the signer selected in the 'Signer Type' drop-down.



**Request Another Person to Complete Filling the Forms**

Your recipient will receive an email message with instructions to complete the electronic application process.

Signer Type:	<b>Owner</b>	Subject:	<b>Mine - DI - Fully Underwritten - Please complete filling your</b>
Recipient Name:			Dear [CLIENT_NAME],
Recipient Email:			
Your Name:	<b>pfg_it</b>		Thank you for applying for 'DI - Fully Underwritten' of Principal Fina
Your Email:	<b>whendricks@insurancetechn</b>		In order to complete your electronic application, please click on the
* Client Last 4 Digits of SSN:	<b>1111</b>		Please use your birth date and the last 4 digits of your SSN to login
* Client Birth Date:	<b>11/11/77</b>		If you have questions please feel free to contact me.

\* These values will not show in email.

Message:

## Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		
<b>FireLight App</b>		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Other		Email request screens for Signature and Client Fill requests.
<b>FireLight Console</b>		
- Windows O/S		
- iOS		
- Android		
-		
<b>Other Systems</b>		
- DTCC Integration		
- Commission netting		
- Activity Reporting		