

iConnect 127634- Support for formatting in Pop-up Messages & Product More Info

(*Related iConnects 111891, 106035, 127480, 125053, 127634)

Workflow Changes

Html can be added to rules in the Admin form designer to create custom formatting in pop-up messages. The 'More Info' field in the Sales Agreement tab will now also support html formatting. The html tags do not have to be encoded before entering as the encoding will be automatically generated upon save.

Features/Requirements

- Html may be directly entered into the rules within the form designer. This will allow users to generate pop-up messages with custom formatting.
- Html may also be added to the 'More info' field within the sales agreement tab of the admin tool to provide custom formatting on the product info pop-up message.
- Html tags will be safely encoded behind the scenes, but will display in the more info field and the rules editor as they were originally entered by the user.

Admin Changes

- The pop-up rules may contain html (html5 or xhtml) formatted text in the constant value which will allow the pop-up to display formatted text in the app portal form rendering. The html property in the rule must be set to true in order for the rule be saved.
- The 'More info' field in the Sales Agreement tab of the Admin tool will accept html tags. The un-encoded html tags will display as entered in the text field and will display as the formatted text in the app portal.

App Changes

- Pop-ups generated by rules within the form will display the html formatted text.
- The 'More Info' pop-up on Create New Application screen will display the html formatted text.


UI Mock Ups

Admin Tool

Pop-up rule with html formatting within the popup dataitem node. The html value must be set to true in order to save the rule containing html.

Rule Name:

```
1 <block>
2   <diget dataitemid="POPUP" />
3   <popup dataitemid="POPUP2" title="Test popup" buttons="OK" html="true">
4     If you want to go to google:
5     <br /><br /><a href="http://www.google.com" target="_blank">this is Google's site</a><br /><br />
6     <div style="font-size: 250%;">This text is big</div>
7   </popup>
8 </block>
```



App Portal

Pop-up generated through form rule displays with html formatting in the app.



Admin Tool

More info field can contain html formatting which will display with formatting in app portal.

Insurance Technologies



- FSE WL Product
- G Delete Me
- gfdgfdg
- IMO/Agency Appt Request
- IT Annuity Product
- IT Multi Signer Product
- IT UL DonzQuest
- Jennie Rule Test**
- Jims Test Term Product
- Jonathan Test Product

Sales Agreement of "Insurance

| | |
|-----------------|---|
| Selling Org | Insurance Technologies ▼ |
| Product Name | Jennie Rule Test |
| More Info | This is some |
| Start | <input type="text"/> End <input type="text"/> |
| Time Zone | ▼ |
| Replace Product | Select Replaced Product ▼ |

App Portal

More info pop-up in the app portal displays with the html formatted text.

IT Create a New Application

Jurisdiction: Colorado Product Type: Auto

Auto Insurance Technologies Jennie Rule Test

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More Info

This is some text!

OK

Areas Impacted

| System Area | Yes | Comment |
|---------------------------------|-----|---|
| Admin Tool | | |
| - Form Library | | |
| - Design Forms | x | Html formatting can be used in the pop-up rules by setting the html property to true. |
| - Profile Administration | | |
| - Reports | | |
| - Deployment | | |
| | | |
| FireLight App | | |
| - New Application | x | More info pop-up will display html formatting set in sales agreement |
| - Edit Application | | |
| - Signature Process | | |
| - Review Queue | | |
| - Manual Review | | |
| - User Preferences | | |
| - Inbound Integration | | |
| - Outbound Integration | | |
| - PDF Generation | | |
| - Other | | |
| | | |
| FireLight Console | | |
| - Windows O/S | | |
| - iOS | | |
| - Android | | |
| - | | |
| Other Systems | | |
| - DTCC Integration | | |
| - Commission netting | | |
| - Activity Reporting | | |

Steps for testing 'More Info' formatting:

1. Add an html string in the admin tool Sales Agreement tab in the text field for More Info.
2. In the app portal, create an application for a product using the modified sales agreement.
3. Click on the More Info icon to verify the formatting is as expected.

Steps for testing the formatted pop-up control

1. Add a label to the form in the Admin form designer.
2. Create a rule using other controls to trigger the pop-up control.
3. Add the html string with the desired text to the rule and set the html property to true.
4. Open the application within the app portal, trigger the pop-up, and verify the formatting of the text is as expected.