iConnect 177313 Design Approach

Project Overview

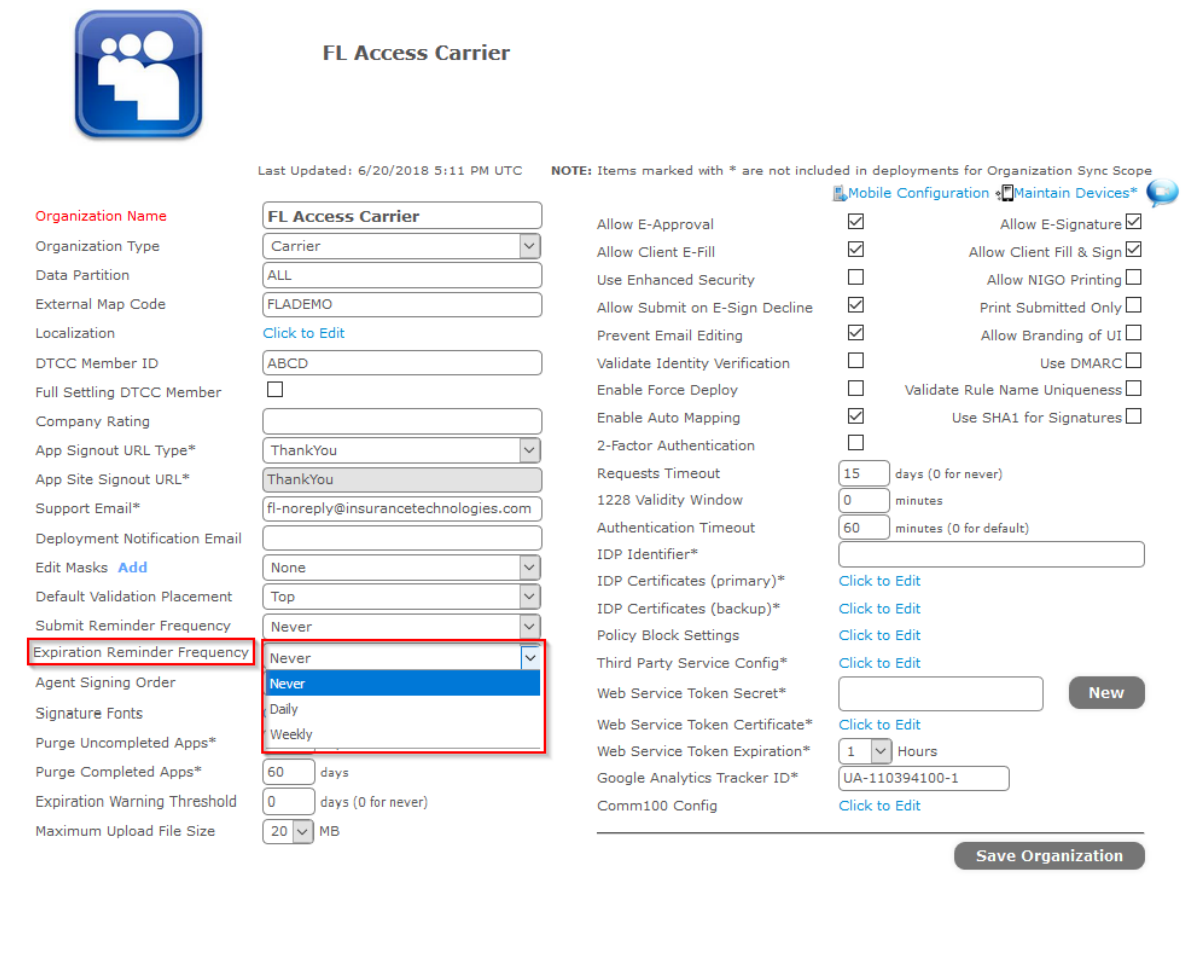This enhancement will add to the existing "Expiration Warning Threshold" functionality to introduce an "Expiration Warning Frequency" at the organization level that will include an e-mail frequency (Never, Daily, Weekly), allowing the organization to send multiple warnings to the agent/client.

Features/Requirements

- Create a new expiration reminder frequency setting.
  - This setting can be set to "Never", "Daily", or "Weekly".
- Add the ability to put a [count] variable in e-mail templates to convey the number of days until expiration.

Admin Changes

This feature can be configured in the Profiles > Organizations section of the admin tool allowing the user to select "Never", "Daily", or "Weekly".

Update current e-mail templates sent for expiration warnings to include a [count] in the message. This gives you the ability to add a field/variable in the message that will pull the number of days remaining until expiration.

UI Mock Ups

Utilize the current expiration e-mail templates –

Email Template Type	Client Request Expiration Warning

Email Subject Line	Client Request about to Expire
Email Template	Dear <CLIENT_NAME>, Your pending request in <TRANSACTION_TYPE> <APPLICATION_NAME> is about to expire. Please take all necessary actions that this requires. To complete this request, click on <URL_LINK> link. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of a new browser window.

Email Template Type	Agent Request Expiration Warning

Email Subject Line	Agent Request about to Expire
Email Template	Dear <AGENT_NAME>, Your pending request to <CLIENT_NAME> in <TRANSACTION_TYPE> <APPLICATION_NAME> is about to expire. Please take all necessary actions that this requires.

How to Enable and Use This Feature

This feature is enabled by setting the Expiration Frequency Reminder in the organization section of the admin tool.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration	X	Addition of "Expiration Reminder Frequency" in organizations tab.
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		