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## Sales Agreement History Update

# FIRELIGHT BASE

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FireLight®

Platform

**SALES AGREEMENT HISTORY UPDATE**

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**Insurance Technologies, LLC**

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# iConnect Design Approach - Sales Agreement History Update

## Project Overview

Enhancements were made to the Sales Agreement Admin during the 2.19 release to allow Custom Lists to be added or removed. The Sales Agreement History will be enhanced to include the updates for Custom Lists added or removed within the Sales Agreement.

### Impacts:


Admin, Sales Agreement History - Will now display history of Custom List changes (add/remove) made on the Sales Agreement Page

## 1 Include Custom List Changes in Sales Agreement History (239914)

Details for Custom Lists under the Sales Agreement will be added to the Sales Agreement History. Any changes that are made to the Custom Lists (adding and removing) will be reflected. This will allow the user to view each change that has been made for the Custom Lists inside the Sales Agreement for the selected agreement. We will use existing Sales Agreement History logic and add the details for the Custom List changes. If Custom List(s) are added and removed by the user prior to save, those actions will not display in the Sales Agreements History. Only the items that are updated/changed and saved will be reflected in the history.

Example of Sales Agreement History when a Custom List is added and removed:

**Sales Agreements**

**FL Access Carrier**


Product	Agreement	
Accumulation Product	True	X
Annuity 222	True	X
Annuity 333	True	X
Annuity Care Plus	True	X
Annuity Rates DRAFT	True	X
BD Change - INS	False	X
BD Change - ITC	False	X
BL Test Product	True	X
Classic Term	True	X

Sales Agreement of "FL Access Carrier" for product "Accumulation Product"

Sales Agreement Details
Sales Agreement History

Action	Old Value	New Value	Action Date	Login
Sales Agreement saved and updated for selling org: FL Access Carrier			1/20/2021 6:45:54 AM	Abi_FLADEMO
'TEST GRID' Custom List deleted from Sales Agreement for selling org: FL Access Carrier			1/20/2021 6:45:54 AM	Abi_FLADEMO
'TEST GRID' Custom List added to Sales Agreement for selling org: FL Access Carrier			1/20/2021 6:45:42 AM	Abi_FLADEMO
Sales Agreement saved and updated for selling org: FL Access Carrier			1/20/2021 6:45:42 AM	Abi_FLADEMO
State Jurisdiction inserted for selling org: FL Access Carrier		AR	1/20/2021 6:43:27 AM	Abi_FLADEMO
Sales Agreement saved and updated for selling org: FL Access Carrier			1/20/2021 6:43:27 AM	Abi_FLADEMO
State Jurisdiction deleted for selling org: FL Access Carrier	AR		1/20/2021 6:43:03 AM	Abi_FLADEMO
Sales Agreement saved and updated for selling org: FL Access Carrier			1/20/2021 6:43:03 AM	Abi_FLADEMO
'Products' Custom List deleted from Sales Agreement for selling org: FL Access Carrier			1/20/2021 6:41:05 AM	Abi_FLADEMO
Sales Agreement saved and updated for selling org: FL Access Carrier			1/20/2021 6:41:05 AM	Abi_FLADEMO

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### Acceptance Criteria

- Sales Agreement History displays details for Custom Lists added to an agreement.
- Sales Agreement History displays details for Custom Lists removed from an agreement.
- Sales Agreement History reflects only the actions that are saved. Any actions that are made, but not saved will not be reflected in the history.