iConnect 157242 Design Approach

Project Overview

Ability to differentiate client fill/Sign request from Client Fill and Sign request.

Features/Requirements

Ability to see if the pending request is Client fill and sign in the dialog box. Know by Audit trail that a client fill and sign is sent.

Use Cases / Workflow Changes

More Detail will be provided on Request and Audit screen, no workflow changes.

Admin Changes

No Admin Changes Needed

App Changes

New Details added the Request Dialog Box for Fill and Sign. New Audit for Application History for client fill and sign. New Column added to interested party to indicate if request is client fill and sign.

Integration Changes

No Integration Changes needed

UI Mock Ups

New Pending Request Dialog

Client Fill

Pending Request

Request Type: Electronic Signature Owner
Is Client Fill and Sign Request
Recipient: Owner Name;
Email Sent: 1@11.11
Date: 6/21/2017 4:51:17 PM
Passcode: wN1pcUZn

Send Reminder to Owner Name

Send Passcode to Owner Name's Cell

Phone

Send Passcode to Owner Name's

Email

Cancel this request

[Close]

Signature Request

E-Request Sent To Client To Complete	'wselken@insurancetechnologies.com' sent email to request client to complete the application. IT TESTER FULLNAME will need to complete the forms. The email was sent to ' er'. The application is currently checked-out pending client completion.
6/1/2017 2:45:59 PM MST	
E-Request Sent To Client To Complete	Client Fill and Sign Initialized
6/1/2017 2:45:58 PM MST	

New Audit Entry

How to Enable and Use This Feature

Feature will be automatically changed for all organizations.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		

FireLight App		
- New Application		
- Edit Application	Y	Update Outstanding Request Dialog
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
- All Applications	Y	New Audit Entry
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		