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Create an All in the Product Type Dropdown

# FIRELIGHT BASE

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Platform

**CREATE AN ALL IN THE PRODUCT TYPE DROPDOWN**

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**Insurance Technologies, LLC**

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# iConnect 222951 Design Approach - Create an All in the Product Type Dropdown

## Project Overview

With this enhancement, we're adding a new "All" Product Type option listed to show all of the product types listed for that jurisdiction and organization. There are cases where carriers classify their products under a different product type which causes confusion when searching for products. This will support filtering by "all carrier products" rather than having to know the correct product type for the carrier.

This change was made in both the Product Type Dropdown, and the Default Product Type dropdown listed within the User Preferences.

Impacts:

Product/Jurisdiction Dashboard - adding in the "All" Product type to display all products for that carrier/distributor

User Preferences - Adding the "All" in the Default Product Type

## 1 An ALL Product Type option needs to be added in the dropdown for Product Type

An option for All Product types needs to be listed in the dropdown under Product Type within the dashboard. This will show all of the product types that are listed within that organization under the jurisdiction that is chosen. This will also need to be listed at the top of the dropdown at all times (as pictured in the mockup).

**Create New Application**

Jurisdiction: Alabama Locale: English Product Type: Select Product Type

Carrier: Select Carrier

**Product Type Dropdown Options:**

- All
- Annuity
- Corporate Forms
- Fixed Annuity
- Fixed Indexed Annuity
- Life
- Multi-Year Guaranteed Annuity
- Term Life
- Variable Annuity

**Application Templates:**

Life	Accordia	Individual Application
Life	FL Access Carrier	Template Life With

### ***Acceptance Criteria***

- Under the Product Type dropdown, a new option of "All" will be listed
- The All option will list all of the current product types that are listed within the Jurisdiction that is listed and the user has rights to see
- This feature will always be at the top of the dropdown, no matter what is listed below (the rest of the list should be in alphabetic order)
- Any Product Filtering through the provider will still be honored with this new feature

## **2 Add ALL To Default Product Type in Personal Preferences**

The "ALL" product types will need to be added to the Default Product Type in the personal preferences section. The "ALL" will be listed at the top of the list at all times (please see mockup). The ALL will be linked to all of the available product types for that particular user.

General

User Full Name

Mark Agent

User Email Address

it@insurancetechnologies.com

Default Jurisdiction

Select Jurisdiction

Default Product Type

Annuity

All

Default Time Zone

Annuity

Locale

Disability Income

Fixed Annuity

Variable Annuity

Term Life

Universal Life

Whole Life

Immediate Annuity

Equity Indexed Annuity

Fixed Indexed Annuity

Multi-Year Guaranteed Annuity

Group Annuity

Non-Insurance Product

Quote

Property

Corporate Forms

Combo

Life Insurance

Service Forms

Page Size for My App. List

Send Message Center Emails

☒

Use Agent Email for All Communications

☒

Enable Rule Tracing For Session

☐

Agent

First Name

Joe

Phone Number

303-999090

CRD Number

crd-1234

Firm Name

Jackson Financial

Firm Address:

Business Street

33 Firm Street

City

Denver

State

Select Jurisdiction

### Acceptance Criteria

- The "All" will be listed at the top of the product type list at all times
- The "All" will be listed within the default Product Type list
- The "All" will link to all of the available products for that particular user.

## 3 Sort the Default Product Type alphabetically

Within the Preferences Section, the Default Product type will need to be sorted in an alphabetical order. However, the "All" product Type will still be listed at the top of the list at all times.

Ex: All

Annuity

Fixed Annuity

Fixed Indexed Annuity

Life

Term Life

Whole Life

***Acceptance Criteria***

- Default Product Type will be listed in an alphabetical order
- "All" will still be listed at the top of the Default Product Type dropdown list