

# Create an All in the Product Type Dropdown

# **FIRELIGHT BASE**



Platform

CREATE AN ALL IN THE PRODUCT TYPE DROPDOWN

**Document Version: 1.1** 

Published: October 14, 2020



### **Insurance Technologies, LLC**

Copyright © 2020 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight<sup>®</sup> and FireLight<sup>®</sup> are registered or unregistered trademarks of Insurance Technologies, LLC (IT) in the USA and/or other countries.

ACORD, ACORD ObjX, ACORD OLifE, AL3, ACORD Advantage, ACORD XML, and "Association for Cooperative Operations Research and Development" are registered or unregistered trademarks of ACORD Corporation in the USA and/or other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, Windows, and other Microsoft names and logos are either registered or unregistered trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

All other trademarks are the property of their respective owners.

The information contained in this document is current as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, Insurance Technologies, LLC cannot guarantee the accuracy of any information presented after the date of publication.

INSURANCE TECHNOLOGIES, LLC MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT AND HEREBY DISCLAIMS ANY AND ALL SUCH WARRANTIES.

The material contained in this document is considered confidential and the intellectual property of Insurance Technologies, LLC. The recipient is given access to this material on the condition that the recipient (1) will keep the information confidential at all times, and (2) will not copy or modify or share the materials, except as expressly authorized by Insurance Technologies, LLC. The recipient should limit its disclosure of the information and materials only to its employees who have a clear business purpose and need to receive such information and materials and who are bound by confidentiality obligations to the recipient that are at least as protective of such information and materials as those contained herein.

### **Insurance Technologies, LLC**

Two South Cascade Avenue Colorado Springs, CO 80903

**USA** 

Phone: 719.442.6400

FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com Website: http://www.insurancetechnologies.com



## **Table of Contents**

iCor	nnect 222951 Design Approach - Create an All in the Product Type Dropdown	. 4
1	An ALL Product Type option needs to be added in the dropdown for Product Type	. 4
2	Add ALL To Default Product Type in Personal Preferences	. 5
3	Sort the Default Product Type alphabetically	. 6





# 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

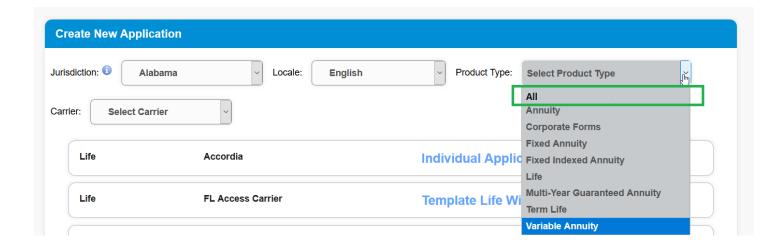
User Preferences - Adding the "All" in the Default Product Type

# 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).







### **Acceptance Criteria**

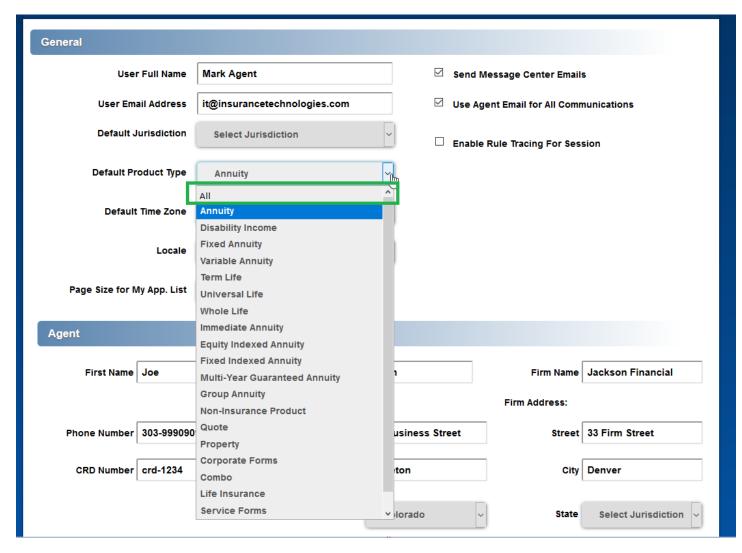
- Under the Product Type dropdown, a new option of "All" will be listed
- The All option will list all of the current product types that are listed within the Jurisdiction that is listed and the user has rights to see
- This feature will always be at the top of the dropdown, no matter what is listed 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.







#### 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