

---

Data Copy Enhancement 2.25 July

# FIRELIGHT BASE

---

FireLight®

Platform

**DATA COPY ENHANCEMENT 2.25 JULY**

**Document Version: 1.1**

**Published: June 1, 2022**

**Insurance Technologies, LLC**

Copyright © 2022 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight® and FireLight® 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](mailto:info@insurancetechnologies.com)

Website: <http://www.insurancetechnologies.com>

## Table of Contents

Design Approach - Data Copy Enhancement 2.25 July .....	4
1 Enhance Wizard Designer (Support mapping from Form to Wizard).....	4
1.1 Add "Copy Form Fields" option to Wizard "Page Options" section .....	4
1.2 Create / Display the "Copy Fields" Dialogue Box in the Wizard designer.....	5
1.3 Controls to be made available for mapping from Forms to a Wizard .....	6
1.4 Search functionality in Wizard Dialogue Box .....	7
1.5 Field Mapping behavior/ initial display on the Wizard when fields from a Form are mapped to a Wizard page .....	122
2 Enhance "Dialogue Box" in Forms to include Wizard options (Mapping from Wizard to Form). ....	16
2.1 Add Wizards to drop down options for selection .....	16
2.2 Display Wizard Page Name in Dialogue box.....	18
2.3 Controls to be made available for mapping from Wizard to Forms .....	18
2.4 Dialogue Box controls behavior when copying from Wizard to Form.....	200
2.5 Field Mapping behavior/ initial display on the form when fields from a Wizard are mapped to a Form .....	22
2.6 Custom Action Button items to exclude as options to be mapped from Wizard to Form .....	255
2.7 Mask Mapping Behaviors from Wizard to Forms .....	26

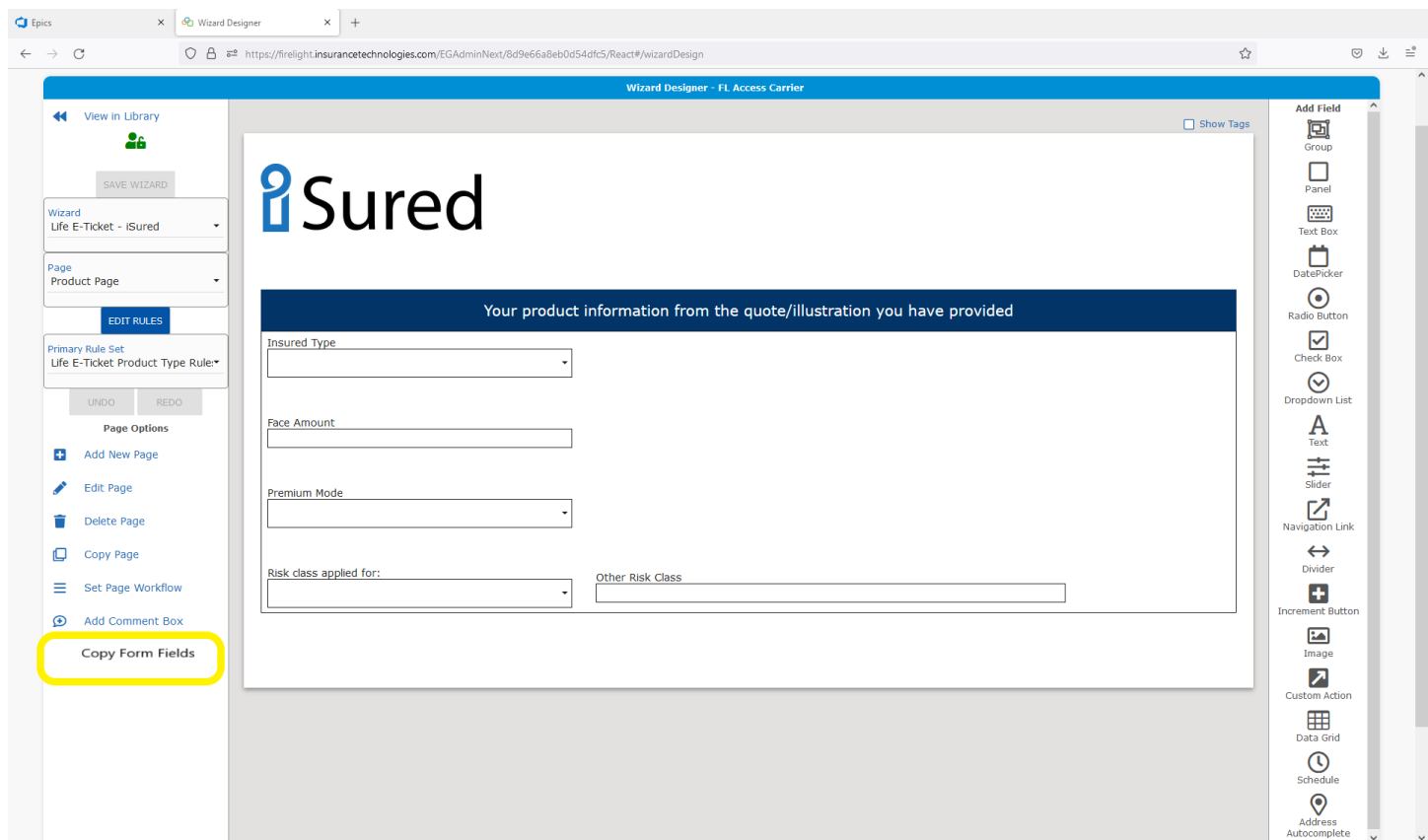
# Design Approach - Data Copy Enhancement 2.25 July

Firelight Enhancement to provide the ability to "copy" data fields from a Wizard and paste them into a Form and the ability to copy from a Form and paste into a Wizard. Regardless of which copy/paste route is taken, the Field Properties associated with the source data item are to carry over to the destination item, as long as there is a one- to-one relationship for those field properties in both Wizard and Form.

## 1 Enhance Wizard Designer (Support mapping from Form to Wizard)

### 1.1 Add "Copy Form Fields" option to Wizard "Page Options" section

Add a "Copy Form Fields" option to the Wizard "Page Options" section. Clicking the "Copy Form Fields" option will present the user with the "Copy Fields" dialogue box where they can indicate the form that is to be the source of the data field options available for copying.



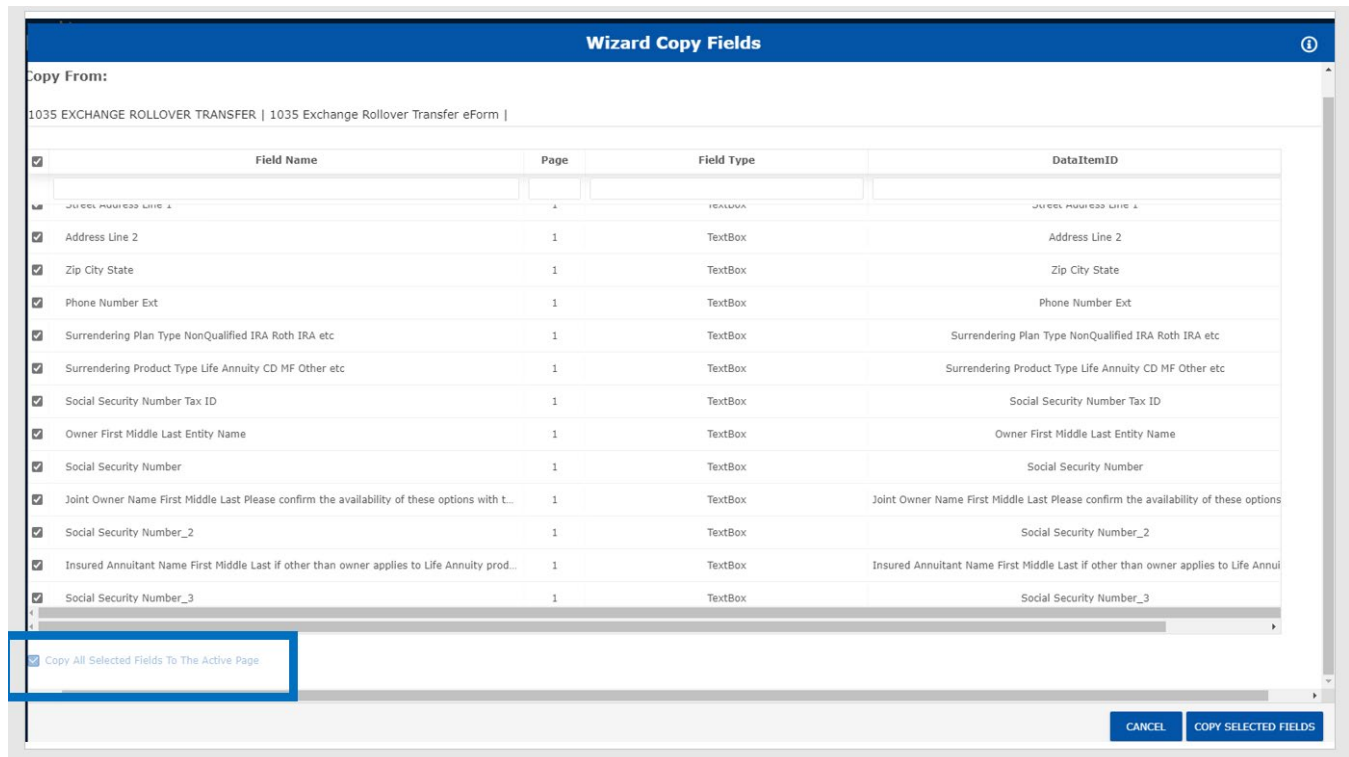
## 1.2 Create / Display the "Copy Fields" Dialogue Box in the Wizard designer

When the "Copy Form Fields" option under the Page Options list in the Wizard Designer is selected, the "Copy Fields" Dialogue Box will be displayed. In the "Copy From" drop down box of the Dialogue Box, display all the Forms available from which data fields can be copied. *(This will not include Wizard options as copy functionality currently exists for Wizard to Wizard copying and this enhancement did not change that process.)*

Since there is no direct correlation between the coordinates associated with the control on a Form and coordinates available within a Wizard, the mapping of fields from forms (no matter what the page on which a data field might exist on a form) will map to the single Wizard page displayed (one page at a time). As such, the following check boxes located at the bottom of the existing Dialogue box in the current Forms process will not to be presented as options in the Dialogue box created for the Wizard:

- Keep Original Field Coordinates
- Copy Page Names
- Delete All Existing Fields Before Copy

The "Copy All Selected Fields To The Active Page" option is to be the default process for mapping from a Form to a Wizard and cannot be changed or edited.



Field Name	Page	Field Type	DataItemID
Address Line 1	1	TextBox	Address Line 1
Address Line 2	1	TextBox	Address Line 2
Zip City State	1	TextBox	Zip City State
Phone Number Ext	1	TextBox	Phone Number Ext
Surrendering Plan Type NonQualified IRA Roth IRA etc	1	TextBox	Surrendering Plan Type NonQualified IRA Roth IRA etc
Surrendering Product Type Life Annuity CD MF Other etc	1	TextBox	Surrendering Product Type Life Annuity CD MF Other etc
Social Security Number Tax ID	1	TextBox	Social Security Number Tax ID
Owner First Middle Last Entity Name	1	TextBox	Owner First Middle Last Entity Name
Social Security Number	1	TextBox	Social Security Number
Joint Owner Name First Middle Last Please confirm the availability of these options with t...	1	TextBox	Joint Owner Name First Middle Last Please confirm the availability of these options
Social Security Number_2	1	TextBox	Social Security Number_2
Insured Annuitant Name First Middle Last if other than owner applies to Life Annuity prod...	1	TextBox	Insured Annuitant Name First Middle Last if other than owner applies to Life Annuity
Social Security Number_3	1	TextBox	Social Security Number_3

☒ Copy All Selected Fields To The Active Page

CANCEL COPY SELECTED FIELDS

### 1.3 Controls to be made available for mapping from Forms to a Wizard

There are controls within a Form that are either not available in a Wizard or would not be necessary for copying. The following controls will be made available for copying from a Form to a Wizard:

Text Box

Calendar (equates to Date Picker control in Wizard)

Radio Button

Check Box

ComboBox List (equates to DropDown in Wizard)

Custom Action

Address Auto Complete

Label (equates to Text in Wizard)

#### **Excluded / unavailable for copying from Form to Wizard:**

Signature Box

Signature Initials

Bar Code

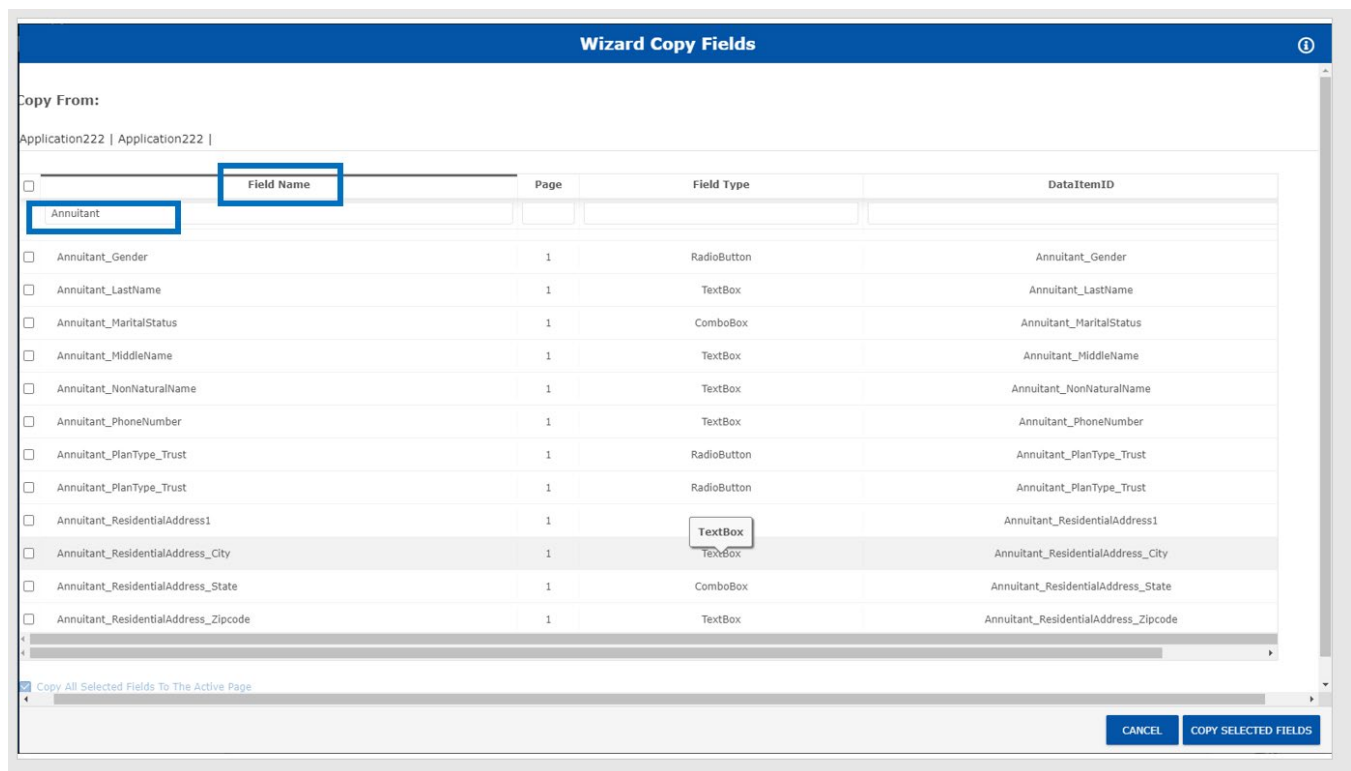
## 1.4 Search functionality in Wizard Dialogue Box

"Search" functionality has been added within the Dialogue Box created for the Wizard that will allow for the selection of form fields for mapping. The Search fields are located under the field header names: "Field Name", "Page", "Field Type", and "DataItemID".

Search functionality will allow the user, once a form has been selected as the source of the data, to narrow down the fields displayed that are to be available for copying. With the Search functionality in Wizard, there are various options available for Search.

The User will be able to search fields by "Field Name", "Page" number, "Field Type", "DataItemID" or by using a combination of these parameters.

1) User can use the search parameters under the "Field Name" to narrow the list of fields displayed down to only fields that contain the entered search parameter. For example, the below screen shot shows that a Search using the Field Name area for any data items utilizing "ad" as part of the field name.



The screenshot shows the "Wizard Copy Fields" dialog box. The "Copy From:" section is set to "Application222 | Application222 |". The search is performed on the "Field Name" column, with the value "ad" entered. The results are filtered to show only fields containing "ad".

	Field Name	Page	Field Type	DataItemID
<input type="checkbox"/>	Annuitant			
<input type="checkbox"/>	Annuitant_Gender	1	RadioButton	Annuitant_Gender
<input type="checkbox"/>	Annuitant_LastName	1	TextBox	Annuitant_LastName
<input type="checkbox"/>	Annuitant_MaritalStatus	1	ComboBox	Annuitant_MaritalStatus
<input type="checkbox"/>	Annuitant_MiddleName	1	TextBox	Annuitant_MiddleName
<input type="checkbox"/>	Annuitant_NonNaturalName	1	TextBox	Annuitant_NonNaturalName
<input type="checkbox"/>	Annuitant_PhoneNumber	1	TextBox	Annuitant_PhoneNumber
<input type="checkbox"/>	Annuitant_PlanType_Trust	1	RadioButton	Annuitant_PlanType_Trust
<input type="checkbox"/>	Annuitant_PlanType_Trust	1	RadioButton	Annuitant_PlanType_Trust
<input type="checkbox"/>	Annuitant_ResidentialAddress1	1	TextBox	Annuitant_ResidentialAddress1
<input type="checkbox"/>	Annuitant_ResidentialAddress_City	1	TextBox	Annuitant_ResidentialAddress_City
<input type="checkbox"/>	Annuitant_ResidentialAddress_State	1	ComboBox	Annuitant_ResidentialAddress_State
<input type="checkbox"/>	Annuitant_ResidentialAddress_Zipcode	1	TextBox	Annuitant_ResidentialAddress_Zipcode

At the bottom, there is a checkbox labeled "Copy All Selected Fields To The Active Page" which is checked. The "CANCEL" and "COPY SELECTED FIELDS" buttons are at the bottom right.

2) User can Search utilizing the "Page" field. User can input the page number of the source form and the display will only show the Data Fields associated with that specific page. In the below example, the Page 2 is indicated for the Search that the display shows only those data elements associated with that page.

**Wizard Copy Fields**

Copy From:  
Application222 | Application222 |

<input type="checkbox"/>	Field Name	Page	Field Type	DataItemID
<input type="checkbox"/>	Annuitant_AutoFill	1	Button	Annuitant_AutoFill
<input type="checkbox"/>	Annuitant_DOB	1	DatePicker	Annuitant_DOB
<input type="checkbox"/>	Annuitant_FirstName	1	TextBox	Annuitant_FirstName
<input type="checkbox"/>	Annuitant_Gender	1	RadioButton	Annuitant_Gender
<input type="checkbox"/>	Annuitant_Gender	1	RadioButton	Annuitant_Gender
<input type="checkbox"/>	Annuitant_LastName	1	TextBox	Annuitant_LastName
<input type="checkbox"/>	Annuitant_MaritalStatus	1	ComboBox	Annuitant_MaritalStatus
<input type="checkbox"/>	Annuitant_MiddleName	1	TextBox	Annuitant_MiddleName
<input type="checkbox"/>	Annuitant_NonNaturalName	1	TextBox	Annuitant_NonNaturalName
<input type="checkbox"/>	Annuitant_PhoneNumber	1	TextBox	Annuitant_PhoneNumber
<input type="checkbox"/>	Annuitant_PlanType_Trust	1	RadioButton	Annuitant_PlanType_Trust
<input type="checkbox"/>	Annuitant_PlanType_Trust	1	RadioButton	Annuitant_PlanType_Trust

☒ Copy All Selected Fields To The Active Page

CANCEL COPY SELECTED FIELDS



3) User can search the forms document utilizing the "Field Type" (type of Control) available on the source form by typing in the leading character(s) of the control type. In the example below, by typing "Combo" in the Field Type search parameter, the only fields showing available for Copy are "ComboBox" (Drop Down box) fields.

**Wizard Copy Fields**

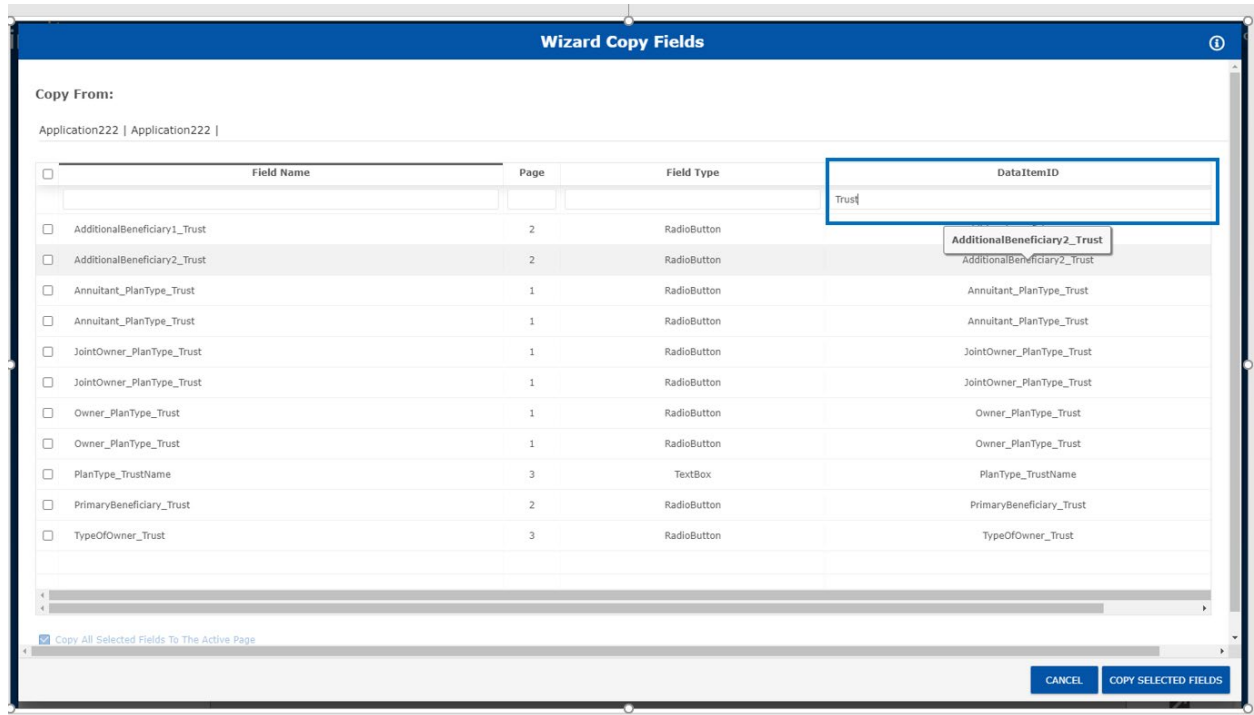
**Copy From:**  
Application222 | Application222 |

Field Name	Page	Field Type	DataItemID
<input type="checkbox"/>		Comb	
<input type="checkbox"/> AdditionalBeneficiary1_MailingAddress_State	2	ComboBox	AdditionalBeneficiary1_MailingAddress_State
<input type="checkbox"/> AdditionalBeneficiary1_Relationship	2	ComboBox	AdditionalBeneficiary1_Relationship
<input type="checkbox"/> AdditionalBeneficiary2_MailingAddress_State	2	ComboBox	AdditionalBeneficiary2_MailingAddress_State
<input type="checkbox"/> AdditionalBeneficiary2_Relationship	2	ComboBox	AdditionalBeneficiary2_Relationship
<input type="checkbox"/> Annuitant_MaritalStatus	1	ComboBox	Annuitant_MaritalStatus
<input type="checkbox"/> Annuitant_ResidentialAddress_State	1	ComboBox	Annuitant_ResidentialAddress_State
<input type="checkbox"/> Client_MailingAddress_State	1	ComboBox	Client_MailingAddress_State
<input type="checkbox"/> Client_MaritalStatus	1	ComboBox	Client_MaritalStatus
<input type="checkbox"/> Client_ResidentialAddress_State	1	ComboBox	Client_ResidentialAddress_State
<input type="checkbox"/> ComboBox_5	1	ComboBox	ComboBox_5
<input type="checkbox"/> CommissionOption	4	ComboBox	CommissionOption
<input type="checkbox"/> FLR_Fee_DB_206	4	ComboBox	FLR_Fee_DB_206

☒ Copy All Selected Fields To The Active Page

CANCEL
COPY SELECTED FIELDS

4) User can search using the "DataItemId" parameter. In the example below, the user is searching the source form for only those data fields that use "Trust" as part of the "DataItemId".



The screenshot shows the "Wizard Copy Fields" dialog box. The "Copy From:" section indicates "Application222 | Application222 |". The main table lists fields with columns for checkboxes, Field Name, Page, Field Type, and DataItemId. A search filter "Trust" is applied to the DataItemId column, highlighting rows where the DataItemId contains "Trust".

	Field Name	Page	Field Type	DataItemId
<input type="checkbox"/>				Trust
<input type="checkbox"/>	AdditionalBeneficiary1_Trust	2	RadioButton	AdditionalBeneficiary2_Trust
<input type="checkbox"/>	AdditionalBeneficiary2_Trust	2	RadioButton	AdditionalBeneficiary2_Trust
<input type="checkbox"/>	Annuitant_PlanType_Trust	1	RadioButton	Annuitant_PlanType_Trust
<input type="checkbox"/>	Annuitant_PlanType_Trust	1	RadioButton	Annuitant_PlanType_Trust
<input type="checkbox"/>	JointOwner_PlanType_Trust	1	RadioButton	JointOwner_PlanType_Trust
<input type="checkbox"/>	JointOwner_PlanType_Trust	1	RadioButton	JointOwner_PlanType_Trust
<input type="checkbox"/>	Owner_PlanType_Trust	1	RadioButton	Owner_PlanType_Trust
<input type="checkbox"/>	Owner_PlanType_Trust	1	RadioButton	Owner_PlanType_Trust
<input type="checkbox"/>	PlanType_TrustName	3	TextBox	PlanType_TrustName
<input type="checkbox"/>	PrimaryBeneficiary_Trust	2	RadioButton	PrimaryBeneficiary_Trust
<input type="checkbox"/>	TypeOfOwner_Trust	3	RadioButton	TypeOfOwner_Trust

At the bottom, there is a checkbox labeled "Copy All Selected Fields To The Active Page" which is checked. The "CANCEL" and "COPY SELECTED FIELDS" buttons are visible at the bottom right.

5) User can search combining Search parameters. User can combine more than one (or all) search parameters to drill down in greater detail on a form that is the source of the data fields. In the example below, the user has combined the Page number and Field Type search parameters to drill down to look at items only on page 1 of the source form and only those "Field Types" that are RadioButton(s).

Wizard Copy Fields

Copy From:

Application222 | Application222 |

<input type="checkbox"/>	Field Name	Page	Field Type	DataItemID
<input type="checkbox"/>		1	ra	
<input type="checkbox"/>	Annuitant_Gender	1	RadioButton	Annuitant_Gender
<input type="checkbox"/>	Annuitant_Gender	1	RadioButton	Annuitant_Gender
<input type="checkbox"/>	Annuitant_PlanType_Trust	1	RadioButton	Annuitant_PlanType_Trust
<input type="checkbox"/>	Annuitant_PlanType_Trust	1	RadioButton	Annuitant_PlanType_Trust
<input type="checkbox"/>	Annuitant_SameAsOwner	1	RadioButton	Annuitant_SameAsOwner
<input type="checkbox"/>	Annuitant_SameAsOwner	1	RadioButton	Annuitant_SameAsOwner
<input type="checkbox"/>	Client_Gender	1	RadioButton	Client_Gender
<input type="checkbox"/>	Client_Gender	1	RadioButton	Client_Gender
<input type="checkbox"/>	DocuSign_CheckBox	1	RadioButton	DocuSign_CheckBox
<input type="checkbox"/>	JointOwner_Gender	1	RadioButton	JointOwner_Gender
<input type="checkbox"/>	JointOwner_Gender	1	RadioButton	JointOwner_Gender
<input type="checkbox"/>	JointOwner_PlanType_Trust	1	RadioButton	JointOwner_PlanType_Trust

☒ Copy All Selected Fields To The Active Page

CANCEL

COPY SELECTED FIELDS

## 1.5 Field Mapping behavior/ initial display on the Wizard when fields from a Form are mapped to a Wizard page

When a "Copy Fields" process is completed where a Form is the source of the data fields and a Wizard is the destination for these fields, the following behaviors will be employed:

1) No matter the size of the control as it exists on the "source" Form, the Default size of the control in the Wizard environment will be used for the fields/controls upon landing on the "destination" Wizard page. Controls can then be moved and adjusted as necessary to fit Wizard requirements. The default size for each control is listed below:

Combo Box/Drop Down, Text Box, Check Box, Radio Buttons, Button/Custom Action and Address Auto Complete controls will display on the Wizard with the default size of 6

Calendar Control/Date Picker will display on the Wizard with the default size of 3

Text / Label will display on the Wizard with the default size of 12

2) All copied fields are to land on the Wizard beginning at the top left of the Wizard moving left to right across the page and then down to the next line until all fields selected for copying have been listed on the current Wizard Page.

3) Where there is a one-to-one relationship between Wizard data field properties and Form data field properties, the data field is to retain the same field properties on the destination Wizard as they existed on the source data item from the Form.

Destination Wizard Text box fields should retain the following Field Properties from the Form data source:

Field Name

Common Tag Name

Error Placement

Input Type

Placeholder Text

Text Mask

SSN Format

Data Group

Data Group Property

Max Length

Read Only

Office Use Only

Destination Wizard Drop Down / Combo Boxes should retain the following Field Properties from the Form data source:

Field Name

Common Tag Name

List Values

Data Group

Data Group Property

Read Only

Office Use Only

Error Placement

Help Text

Destination Wizard Check Boxes and Radio Buttons should retain the following Field Properties from the Form data source:

Field Name

Common Tag Name

Export Value

Group Name

Error Placement

Help Text

Display Style / Border Style

Data Group

Data Group Property

Read Only

Office Use Only

Destination Wizard Custom Action / Button controls should retain the following Field Properties from the Form data source:

Field Name

Common Tag Name

Help Text

Data Group

Custom Action

Custom Action Type

Action Parameter

All custom actions that are available in the form environment are also available in the Wizard environment. However, the reverse is not true as not all custom actions available in the Wizard environment are available in the Forms only environment. *Custom Action of 'External Source' and Custom Action Type of 'Milliman' are not available in Forms environment.*

Destination Wizard Calendar/Date Picker controls should retain the following Field Properties from the Wizard data source:

Field Name

Custom Tag Name

Error Placement

Help Text

Data Group

Data Group Property

Text Mask

## Read Only

Destination Wizard Address Auto Complete controls should retain the following Field Properties from the Wizard data source:

Field Name

Common Tag Name

Placeholder Text

Help Text

Data Group

4)When Check box controls are mapped from a Source Form, they are to map to the destination wizard but will show as a "Radio Button" control. This is by design as Check Box controls are Radio Button controls and they will behave the same.

5) When mapping from a form to a wizard page, if a dataitem(s) from the source form are not located anywhere within the Wizard, the check box column adjacent to the "Field Name" will be checked and the check boxes in the "Already Exists" column will not be checked (as shown below).

Wizard Copy Fields

Copy From: Lawrence Blank | Lawrence Blank |

	Field Name	Page	Field Type	DataItemID	Already Exists
<input checked="" type="checkbox"/>	TextBox_0	1	TextBox	TextBox_0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	CheckBox_0	1	RadioButton	CheckBox_0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Calendar_0	1	DatePicker	Calendar_0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	RadioButton_0	1	RadioButton	RadioButton_0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	ComboBox_0	1	ComboBox	ComboBox_0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Label_0	1	Label	Label_0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Button_0	1	Button	Button_0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AddressAutocomplete_0	1	AddressAutocomplete	AddressAutocomplete_0	<input type="checkbox"/>

☒ Copy All Selected Fields To The Active Page

CANCEL

COPY SELECTED FIELDS

If a dataitem on the 'Source' form already exists in the Wizard, the check box column adjacent to the "Field Name" will be unchecked and the check boxes in the "Already Exists" column will be checked (as shown below). This will be the case even when a copy from a source form to a wizard has been completed but the wizard has not yet been "Saved". The copy process will see that these fields already exist on the destination wizard. They can be copied again but the boxes will have to be checked as they will not be auto selected for mapping.

**Wizard Copy Fields** ⓘ

Copy From: Lawrence Blank | Lawrence Blank |

<input type="checkbox"/>	Field Name	Page	Field Type	DataItemID	Already Exists
<input type="checkbox"/>	TextBox_0	1	TextBox	TextBox_0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	CheckBox_0	1	RadioButton	CheckBox_0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Calendar_0	1	DatePicker	Calendar_0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	RadioButton_0	1	RadioButton	RadioButton_0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	ComboBox_0	1	ComboBox	ComboBox_0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Label_0	1	Label	Label_0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Button_0	1	Button	Button_0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AddressAutocomplete_0	1	AddressAutocomplete	AddressAutocomplete_0	<input checked="" type="checkbox"/>

☒ Copy All Selected Fields To The Active Page

CANCEL
COPY SELECTED FIELDS

## 2 Enhance "Dialogue Box" in Forms to include Wizard options. (Mapping from Wizard to Form)

### 2.1 Add Wizards to drop down options for selection

Upon selection of the "Copy Fields" option in forms, a dialogue box is displayed where the user can select the source of the fields that are to be copied and placed on the form. Wizards will be included as a source of the data fields that are available to be copied. To readily distinguish a Wizard as a source of the data to be copied, the word "WIZARD" will be added as the leading word for all Wizards. This will automatically shift all Wizard sources down in the list as it is sorted alphabetically.



Copy Fields

Wizard-AA Test Copy from fields WIZ | AA Test Copy from fields WIZ |

Wizard-AJL Illust Wizard | AJL Illust Wizard |

Wizard-AM Annuity Wizard | AM Annuity Wizard |

Wizard- Annuity Application Wizard Cynthia | Annuity Application Wizard Cynthia |

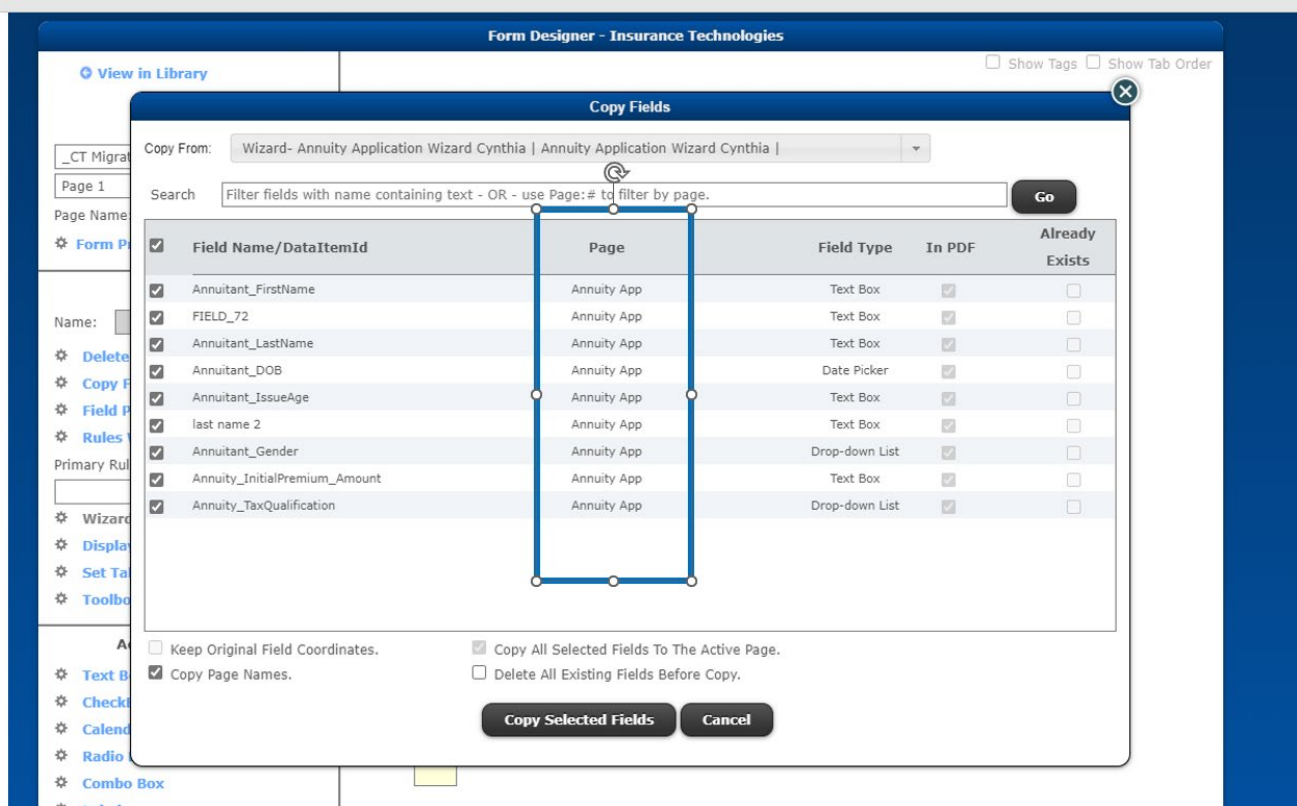
Wizard- Annuity Wizard | Annuity Wizard |

Wizard- Beneficiary Test | Beneficiary Test |

Wizard- BR Form Wizard | BR Form Wizard |

Wizard- BR Form Wizard |

## 2.2 Display Wizard Page Name in Dialogue box



**Copy Fields**

Copy From: Wizard- Annuity Application Wizard Cynthia | Annuity Application Wizard Cynthia |

Search: Filter fields with name containing text - OR - use Page: # to filter by page. **Go**

Field Name/DataItemId	Page	Field Type	In PDF	Already Exists
<input checked="" type="checkbox"/> Annuitant_FirstName	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> FIELD_72	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Annuitant_LastName	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Annuitant_DOB	Annuity App	Date Picker	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Annuitant_IssueAge	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> last name 2	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Annuitant_Gender	Annuity App	Drop-down List	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Annuity_InitialPremium_Amount	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Annuity_TaxQualification	Annuity App	Drop-down List	<input checked="" type="checkbox"/>	<input type="checkbox"/>

☐ Keep Original Field Coordinates.
 ☒ Copy All Selected Fields To The Active Page.
 ☐ Delete All Existing Fields Before Copy.

**Copy Selected Fields** **Cancel**

## 2.3 Controls to be made available for mapping from Wizard to Forms

There are controls within the Wizard that are either not available on Forms or would not be necessary for copying. The following controls should be made available for copying from a Wizard to a Form:

Include:

Text Box

Date Picker (equates to Calendar control in Forms)

Radio Button

Check Box

Dropdown List (equates to ComboBox in Forms)

Custom Action

Address Auto Complete

**Exclude or make unavailable:**

Group

Panel

Text

Slider

Navigation Link

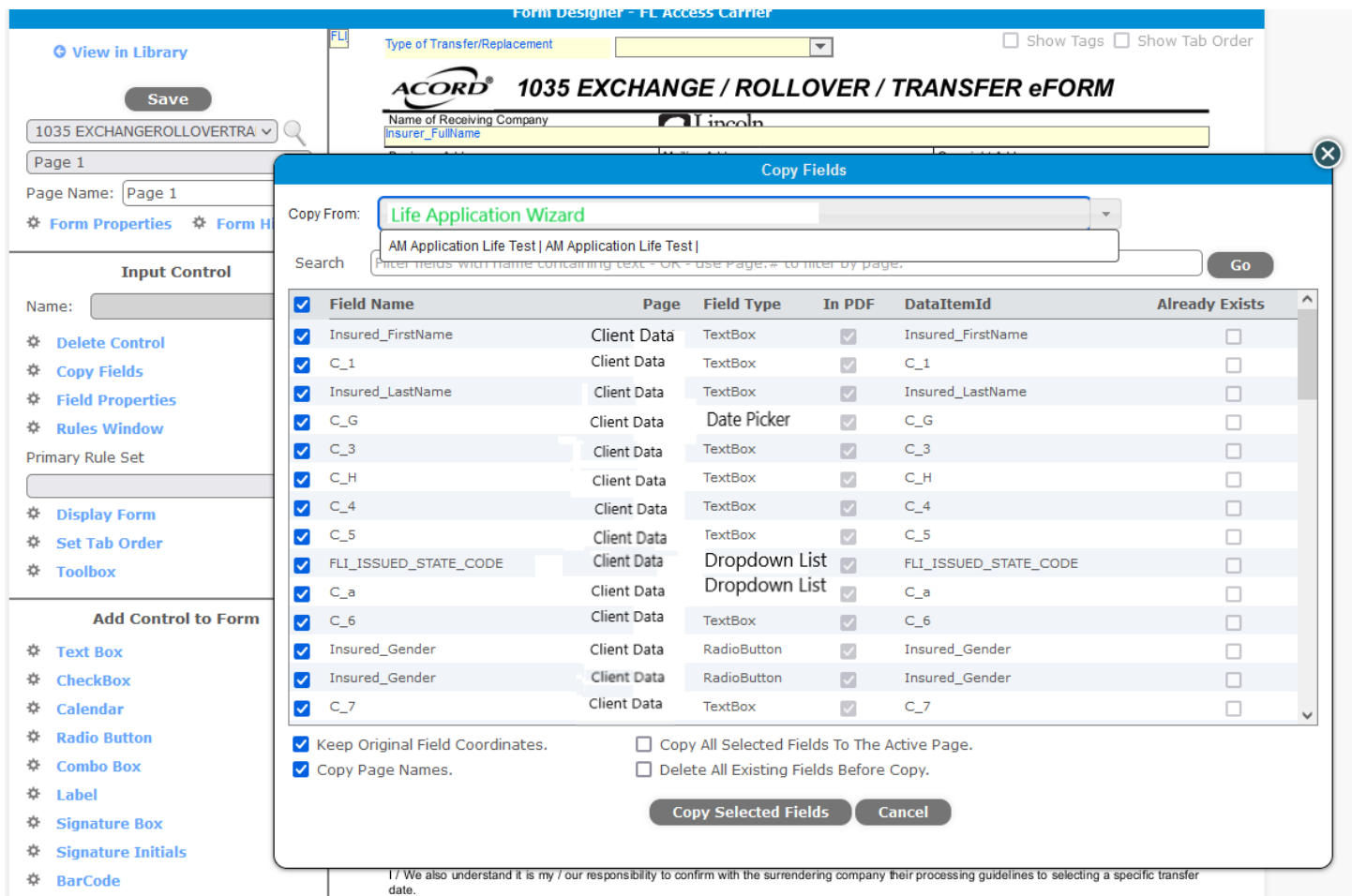
Divider

Increment Buttons

Image

Data Grid

Schedule



**Copy Fields**

Copy From: **Life Application Wizard**

Search: **AM Application Life Test | AM Application Life Test |**

Filter fields with name containing text - OK - use Page # to filter by page.

Field Name	Page	Field Type	In PDF	DataItemId	Already Exists
<input checked="" type="checkbox"/> Insured_FirstName	Client Data	TextBox	<input checked="" type="checkbox"/>	Insured_FirstName	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_1	Client Data	TextBox	<input checked="" type="checkbox"/>	C_1	<input type="checkbox"/>
<input checked="" type="checkbox"/> Insured_LastName	Client Data	TextBox	<input checked="" type="checkbox"/>	Insured_LastName	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_G	Client Data	Date Picker	<input checked="" type="checkbox"/>	C_G	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_3	Client Data	TextBox	<input checked="" type="checkbox"/>	C_3	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_H	Client Data	TextBox	<input checked="" type="checkbox"/>	C_H	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_4	Client Data	TextBox	<input checked="" type="checkbox"/>	C_4	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_5	Client Data	TextBox	<input checked="" type="checkbox"/>	C_5	<input type="checkbox"/>
<input checked="" type="checkbox"/> FLI_ISSUED_STATE_CODE	Client Data	Dropdown List	<input checked="" type="checkbox"/>	FLI_ISSUED_STATE_CODE	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_a	Client Data	Dropdown List	<input checked="" type="checkbox"/>	C_a	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_6	Client Data	TextBox	<input checked="" type="checkbox"/>	C_6	<input type="checkbox"/>
<input checked="" type="checkbox"/> Insured_Gender	Client Data	RadioButton	<input checked="" type="checkbox"/>	Insured_Gender	<input type="checkbox"/>
<input checked="" type="checkbox"/> Insured_Gender	Client Data	RadioButton	<input checked="" type="checkbox"/>	Insured_Gender	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_7	Client Data	TextBox	<input checked="" type="checkbox"/>	C_7	<input type="checkbox"/>

☒ Keep Original Field Coordinates. ☐ Copy All Selected Fields To The Active Page.

☒ Copy Page Names. ☐ Delete All Existing Fields Before Copy.

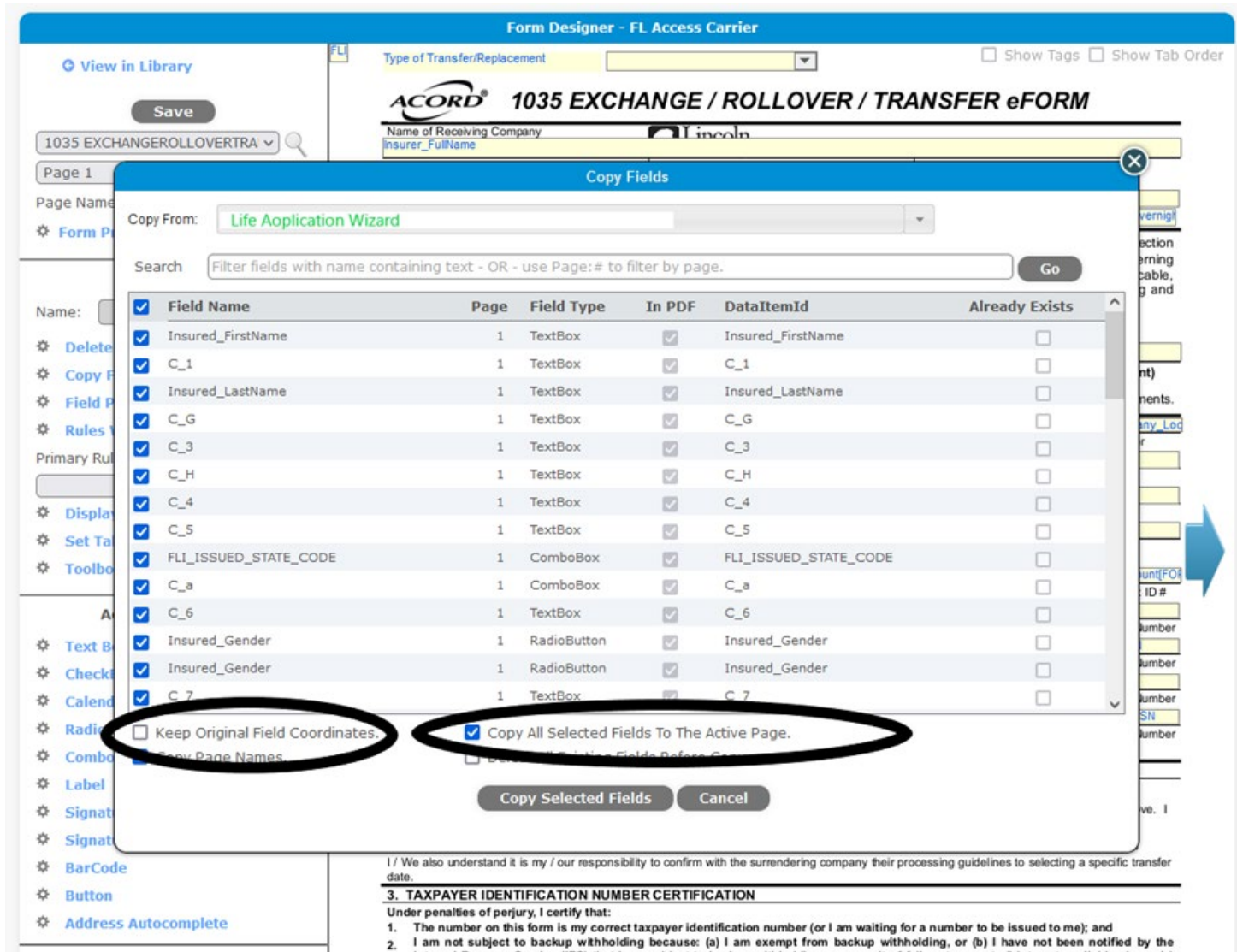
**Copy Selected Fields** **Cancel**

## 2.4 Dialogue Box controls behavior when copying from Wizard to Form

When copying fields from a Wizard to a Form , upon selecting a Wizard from the "Copy From" dropdown as the source of the data fields to be copied, the Check box at the bottom of the dialogue box associated with "Copy all selected fields to the Active Page" will be auto checked and disabled.

Additionally. the check box associated with "Keep Original Field Coordinates" will be unchecked and disabled. Wizard data items do not have coordinates assigned to them.

The current Dialogue box behaviors relating to copy fields from a Form to a Form will remain unchanged.



**Form Designer - FL Access Carrier**

View in Library

Save

1035 EXCHANGEROLLOVERTRA

Page 1

Page Name

Form P

Copy From: Life Application Wizard

Search: Filter fields with name containing text - OR - use Page: # to filter by page. Go

Field Name	Page	Field Type	In PDF	DataItemId	Already Exists
<input checked="" type="checkbox"/> Insured_FirstName	1	TextBox	<input checked="" type="checkbox"/>	Insured_FirstName	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_1	1	TextBox	<input checked="" type="checkbox"/>	C_1	<input type="checkbox"/>
<input checked="" type="checkbox"/> Insured_LastName	1	TextBox	<input checked="" type="checkbox"/>	Insured_LastName	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_G	1	TextBox	<input checked="" type="checkbox"/>	C_G	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_3	1	TextBox	<input checked="" type="checkbox"/>	C_3	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_H	1	TextBox	<input checked="" type="checkbox"/>	C_H	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_4	1	TextBox	<input checked="" type="checkbox"/>	C_4	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_5	1	TextBox	<input checked="" type="checkbox"/>	C_5	<input type="checkbox"/>
<input checked="" type="checkbox"/> FLI_ISSUED_STATE_CODE	1	ComboBox	<input checked="" type="checkbox"/>	FLI_ISSUED_STATE_CODE	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_a	1	ComboBox	<input checked="" type="checkbox"/>	C_a	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_6	1	TextBox	<input checked="" type="checkbox"/>	C_6	<input type="checkbox"/>
<input checked="" type="checkbox"/> Insured_Gender	1	RadioButton	<input checked="" type="checkbox"/>	Insured_Gender	<input type="checkbox"/>
<input checked="" type="checkbox"/> Insured_Gender	1	RadioButton	<input checked="" type="checkbox"/>	Insured_Gender	<input type="checkbox"/>
<input checked="" type="checkbox"/> C_7	1	TextBox	<input checked="" type="checkbox"/>	C_7	<input type="checkbox"/>

☐ Keep Original Field Coordinates. ☒ Copy All Selected Fields To The Active Page.

Copy Selected Fields Cancel

1 / We also understand it is my / our responsibility to confirm with the surrendering company their processing guidelines to selecting a specific transfer date.

**3. TAXPAYER IDENTIFICATION NUMBER CERTIFICATION**

Under penalties of perjury, I certify that:

1. The number on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of failure to report all interest or dividends, or (c)

## 2.5 Field Mapping behavior/ initial display on the form when fields from a Wizard are mapped to a Form

When a "Copy Fields" process is completed where a Wizard is the source of the data fields and a Form is the destination for these fields, the following behaviors will be employed:

1) No matter the size of the control as it exists in the Wizard, the Default size of the controls in the Form environment will be used for the fields/controls upon landing on the form. Controls can then be moved and adjusted as necessary to fit form requirements. The default size for each control is listed below:

Combo Box/Drop Down, Text Box, Calendar Control/Date Picker and Address Auto Complete controls will display on the form with the default size of 50x18

Check Box and Radio Buttons will display on the form with the default size of 15x15

Button / Custom Action will display on the form with the default size of 20x20

2) All copied fields are to land on the form beginning at the top left of the form, moving left to right across the page and then down to the next line.

Field Name

Common Tag Name

Help Text

Data Group

Custom Action

Custom Action Type

Action Parameter

Calendar /Date Picker controls should retain the following Field Properties from the Wizard data source:

Field Name

Custom Tag Name

Error Placement

Help Text

Data Group

Data Group Property

Text Mask

Read Only

Address Auto Complete controls should retain the following Field Properties from the Wizard data source:

Field Name

Common Tag Name

Placeholder Text

Help Text

Data Group

5) When the fields from the source Wizard are displayed in the 'Copy Fields' dialogue box and if the data items do not exist on the destination form, the check boxes adjacent to the Field Name/DataItemId column will be checked and the check boxes under the 'Already Exists' column will be unchecked.

Copy Fields

Copy From: Wizard- AM Annuity Wizard | AM Annuity Wizard |

Search
Filter fields with name containing text - OR - use Page:# to filter by page.
Go

<input checked="" type="checkbox"/>	Field Name/DataItemId	Page	Field Type	In PDF	Already Exists
<input checked="" type="checkbox"/>	Annuitant_FirstName	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Annuitant_LastName	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Annuitant_DOB	Annuity App	Date Picker	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Annuitant_IssueAge	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Annuitant_Gender	Annuity App	Drop-down List	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Owner_SSN	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Verify Owner Information	Annuity App	Custom Action	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Annuity_InitialPremium_Amount	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Annuity_TaxQualification	Annuity App	Drop-down List	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SourceOfFunds_Payment_Method	Payment Info	Drop-down List	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SourceOfFunds_Payment_Type	Payment Info	Drop-down List	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SourceOfFunds_Payment_Amount	Payment Info	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AccountHolder_Type	Payment Info	Radio Button	<input checked="" type="checkbox"/>	<input type="checkbox"/>

☐ Keep Original Field Coordinates.
☒ Copy All Selected Fields To The Active Page.
☒ Copy Page Names.
☐ Delete All Existing Fields Before Copy.

Copy Selected Fields
Cancel

6) When the fields from the source Wizard are displayed in the 'Copy Fields' dialogue box and if the data items already exist on the destination form, the check boxes adjacent to the Field Name/DataItemId column will be unchecked for those existing data items and the check boxes under the 'Already Exists' column will be checked for those data items.

/view in Library

Copy From: Wizard- AM Annuity Wizard | AM Annuity Wizard |

<input type="checkbox"/>	Field Name/DataItemId	Page	Field Type	In PDF	Already Exists
<input type="checkbox"/>	Annuitant_FirstName	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Annuitant_LastName	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Annuitant_DOB	Annuity App	Date Picker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Annuitant_IssueAge	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Annuitant_Gender	Annuity App	Drop-down List	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Owner_SSN	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Verify Owner Information	Annuity App	Custom Action	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Annuity_InitialPremium_Amount	Annuity App	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Annuity_TaxQualification	Annuity App	Drop-down List	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SourceOfFunds_Payment_Method	Payment Info	Drop-down List	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SourceOfFunds_Payment_Type	Payment Info	Drop-down List	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SourceOfFunds_Payment_Amount	Payment Info	Text Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AccountHolder_Type	Payment Info	Radio Button	<input checked="" type="checkbox"/>	<input type="checkbox"/>

☐ Keep Original Field Coordinates.
☒ Copy All Selected Fields To The Active Page.

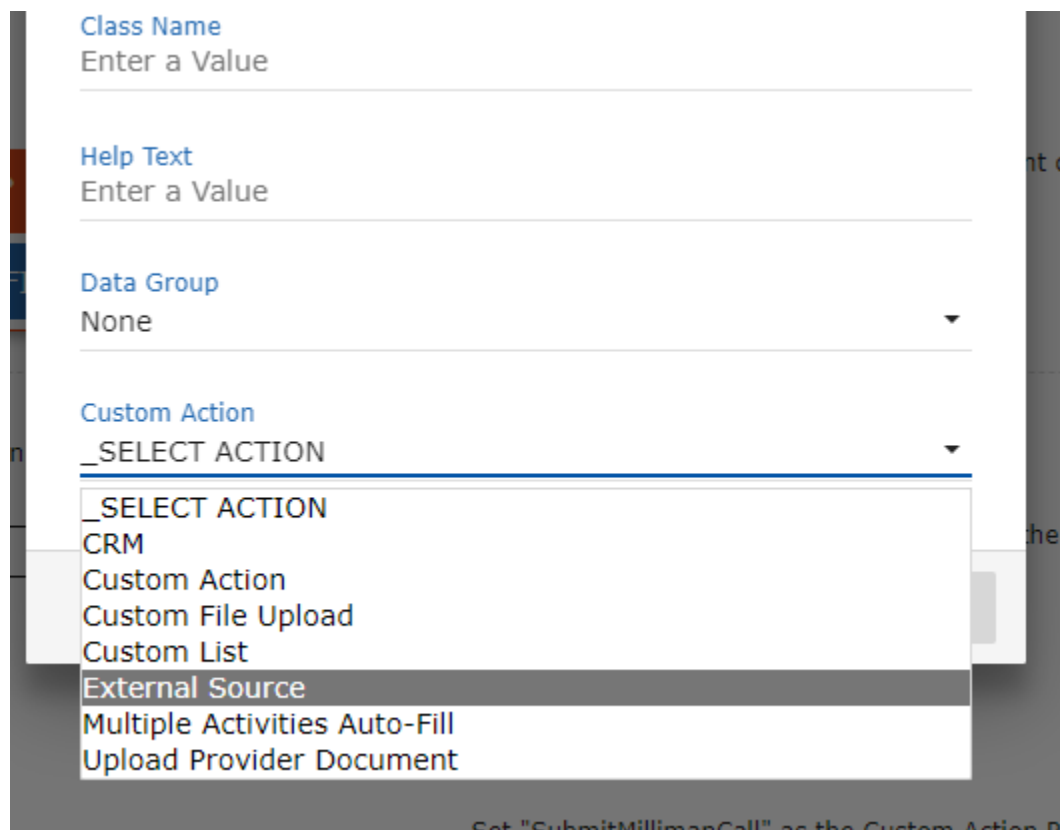
☒ Copy Page Names.
☐ Delete All Existing Fields Before Copy.



## 2.6 Custom Action Button items to excluded as options to be mapped from Wizard to Form

There are specific Custom Actions that were developed to only be available within a Wizard environment and are not options available within a Forms environment. These options will not be available in the "Copy Fields" dialogue box with the Form copy process.

The Custom Action entitled '**External Source**' is a Wizard only option and any Custom Action button control utilizing this Custom Action destination will be excluded from the list of data controls available to be copied from a wizard source to a form destination.



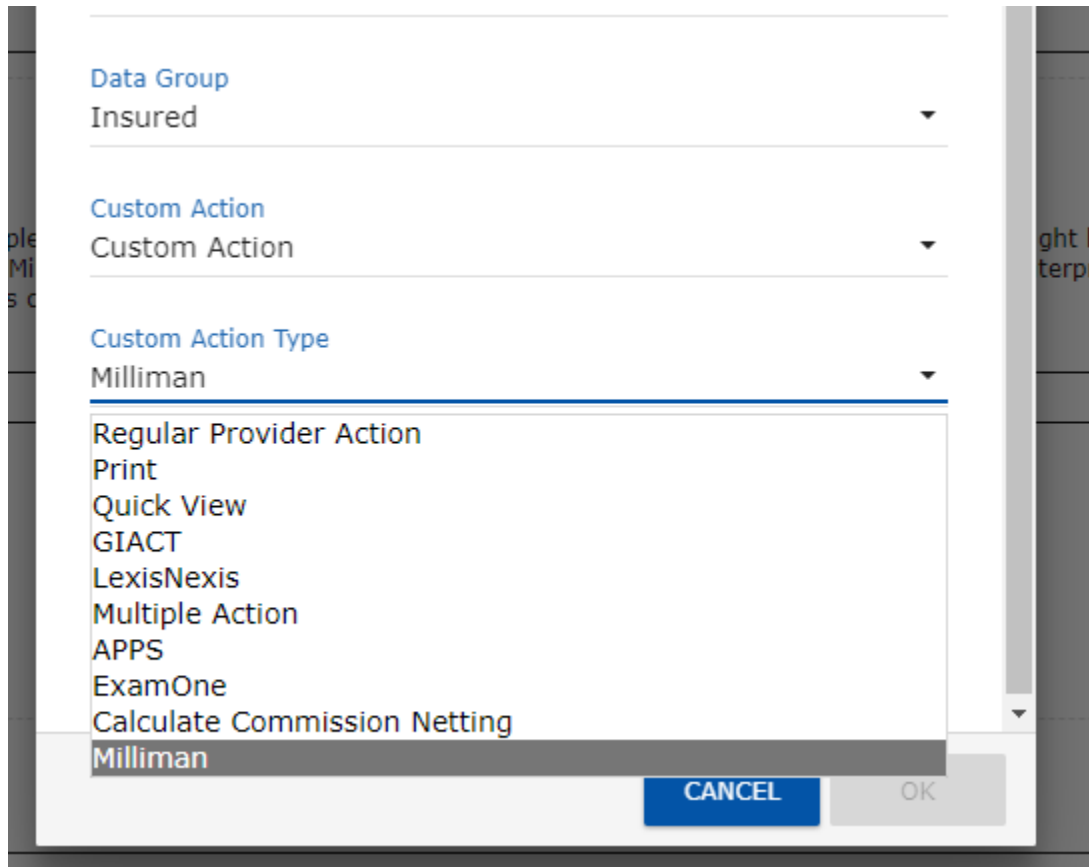
The screenshot shows a 'Copy Fields' dialog box with the following fields and their current values:

- Class Name:** Enter a Value
- Help Text:** Enter a Value
- Data Group:** None
- Custom Action:** \_SELECT ACTION

The Custom Action dropdown menu is open, displaying the following options:

- \_SELECT ACTION
- CRM
- Custom Action
- Custom File Upload
- Custom List
- External Source** (highlighted)
- Multiple Activities Auto-Fill
- Upload Provider Document

With a Wizard, when a Custom Action entitled 'Custom Action' is selected, the list 'Custom Action Type' is presented. The Custom Action Type entitled '**Milliman**' is a Wizard only option and any Custom Action button control utilizing this Custom Action Type will be excluded from the list of data controls available to be copied from a wizard source to a form destination.




## 2.7 Mask Mapping Behaviors from Wizard to Forms

Any "Masks" that are added in the 'Organization Settings', under the 'Activity' tab are to be available for mapping when a dataitem to be mapped has one of these Mask selected.

Any 'custom' mask that has been added in Wizard and is not a part of the mask created under the Organization Setting, is not support in Forms. If a data field to be copied from Wizard to Form has such a 'custom' mask, the data field will be available for copying but the 'Mask" setting in the Field Properties will be blank for the copied field.

**Organization - FL Access Carrier**



## FL Access Carrier

Last Updated: 4/5/2022 6:50 PM UTC

**NOTE:** Items marked with \* are not included in deployments for Organization

Organization
Security
Activity
Signature
Admin

Edit Masks Add

E-Delivery Reminder Frequency			
Expiration Reminder Frequency			
Submit Reminder Frequency			
E-Delivery Expiration Warning Threshold	20	days (0 for never)	Allow Client
Expiration Warning Threshold	4	days (0 for never)	Allow NIGO I
	<div style="display: flex; justify-content: space-around;"> <span>Single</span> <span>Cumulative</span> </div>		Prevent Ema
Maximum Upload File Size	10	MB	
Requests Timeout	1	days (0 for never)	
Validation Message Style	Inline		

None
▼

None  
Date  
Phone  
SSN  
TIN  
Zipcode

Save Organization