

CMR 184096, 103 Signature Requests Design Approach

Project Overview (Sprint Item 1250)

Add Ability to a web service for PHX to have an application that is added through a 103 to have that application send out signature requests with no interaction from the agent.

Features/Requirements

- Utilize the ProcessingInstruction.ProcessingInstructionDesc with "signatures" as the value.
- Modify BatchNewBusinessService to respect the ProcessingInstructionDesc

Use Cases / Workflow Changes

Will allow signature requests to be sent on a new application.

Admin Changes

N/A

App Changes

Just the Service BatchNewBusinessService will have this change. Portions of AutomatedBusinessService were reused.

Integration Changes

Inbound mapping will need to provide complete data to ensure it will successfully reach signatures. Validation failure or missing information for signature will result in a failed service call.

UI Mock Ups

N/A

How to Enable and Use This Feature

It is enabled by passing "signatures" on the
TXLifeRequest.ProcessingInstruction.ProcessingInstructionDesc

Areas Impacted

| System Area | Yes | Comment |
|--------------------------|-----|-----------------------------|
| Admin Tool | | |
| - Form Library | | |
| - Design Forms | | |
| - Profile Administration | | [List subsections affected] |
| - Reports | | |

Areas Impacted

| System Area | Yes | Comment |
|--------------------------|-----|---------|
| - Deployment | | |
| | | |
| FireLight App | | |
| - New Application | | |
| - Edit Application | | |
| - Signature Process | | |
| - Review Queue | | |
| - Manual Review | | |
| - User Preferences | | |
| - Inbound Integration | X | |
| - Outbound Integration | | |
| - PDF Generation | | |
| - Email System | | |
| | | |
| FireLight Console | | |
| - Windows | | |
| - iOS | | |
| | | |
| Other Systems | | |
| - DTCC Integration | | |
| - Commission Netting | | |
| - Activity Reporting | | |
| | | |