iConnect- 117078 Autofill in Email Requests

Workflow Changes

No changes needed.

Features/Requirements

Email for Signature Requests

- Client name would be pre-filled for selected signer using mapped full name field or concatenation of fields for first, middle, last name.
- Client email address for would be pre-filled for selected signer using mapped email field.
- Client 4 digit SSN would be pre-filled for selected signer using mapped 4 digit SSN field or substring of full SSN field.
- Client birthdate would be pre-filled for selected signer using mapped birthdate field or concatenation of fields for birth month, day, and year.
- Your name and your email fields will remain status quo, pre-filling with name and email address entered in the user preference screen if used.
- Client name in template will update with pre-filled name as it does with manually entered name.

Email for Client Fill Requests

- Signer type drop-down control added to allow user to select the signer to be used in mapping pre-filled fields
- Signer drop-down options include only signer types which are currently active on the form and exclude the agent signer type.
- Client 4 digit SSN would be pre-filled for selected signer using mapped 4 digit SSN field or substring of full SSN field.
- Client birthdate would be pre-filled for selected signer using mapped birthdate field or concatenation of fields for birth month, day, and year.
- Recipient Name and Recipient Email fields will not pre-fill with mapped form fields.
- Your name and your email fields will remain status quo, pre-filling with name and email address entered in the user preference screen if used.

Admin Changes

No changes needed. Mapped fields must be updated in the Admin Mappings tab to provide the correlated Form Data ID for the FireLight System Data ID.

App Changes

Email for Signature Requests

- Addition of logic to map the form field or fields for client name to the 'Client Name' field on the email request screen and the generated email request.
- Addition of logic to map the form field for client email address to the 'Client Email' field on the email request screen and the generated email request.
- Addition of logic to map the form field or fields for SSN to the 'Client Last 4 Digits of SSN' field on the email request screen and the encrypted SSN for re-entry into FireLight.
- Addition of logic to map the form field or fields for Birthdate to the 'Client Birth Date' field on the email request screen and the encrypted birthdate for re-entry into FireLight.

Email for Client Fill Requests

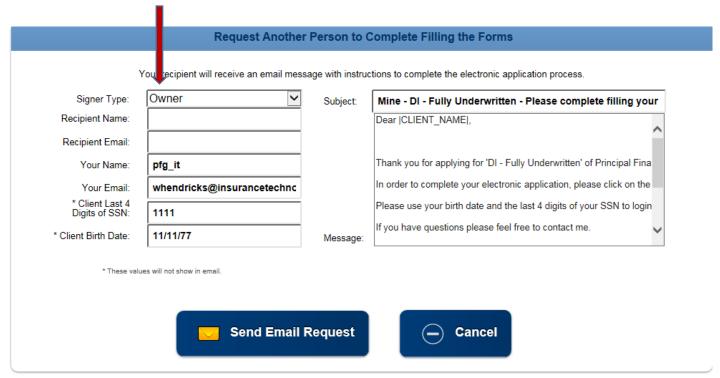
- Drop-down control added to enable user to select signer type to use for pre-filled data values.
- Signer types filtered to include only enabled signer types on form and to exclude agent signer type.
- Based on the user's signer type selection, logic added to map the form field or fields for SSN to the 'Client Last 4 Digits of SSN' field on the email request screen and the encrypted SSN for reentry into FireLight based on the user's signer type selection.
- Based on the user's signer type selection, logic added to map the form field or fields for Birthdate to the 'Client Birth Date' field on the email request screen and the encrypted birthdate for re-entry into FireLight.

UI Mock Ups

Email Request for Signatures with client information pre-filled from mapped form fields



Email Request for Client Fill with client information pre-filled from mapped form fields for the signer selected in the 'Signer Type' drop-down.



Areas Impacted

System Area	Yes	Comment
Admin Tool	163	Comment
- Form Library		
-		
- Design Forms - Profile Administration		
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
 Inbound Integration 		
 Outbound Integration 		
- PDF Generation		
- Other		Email request screens for Signature and Client Fill
		requests.
FireLight Console		
- Windows O/S		
- iOS		
- Android		
-		
Other Systems		
- DTCC Integration		
- Commission netting		
- Activity Reporting		