

iConnect 125238 Morningstar Design Approach

Project Overview

The scope of this project is to be able to pull the Annuity Intelligence report and the contents back into Firelight from Morningstar. A button would be available for the integration. The user would be linked in a pop-up to Morningstar to complete the contract information to generate the report. The details will be sent back to FireLight. Common tags will be given to the data points from Morningstar. This will allow the Morningstar AI data to populate any forms by leveraging common tags.

Features/Requirements

1. Morningstar credentials will need to be added to the “Third Party Config” section on the Organizations page.
2. FireLight will launch into Morningstar via a button, i.e. “Launch Morningstar”. This will open an iframe within FireLight and initiate the SSO.
3. Once the user has been authenticated with the supplied username, they will then go through Morningstar’s UI sections that are required, to generate the report. See Images 1 and 2.
4. Upon clicking on “Generate XML”, the dialog will close. Behind the scenes, Morningstar will POST an XML report back to FireLight.
5. We will then parse the XML, and map common data items.

Use Cases / Workflow Changes

- Clients will need to configure when the button appears.
- Clients may also want to force the upload of the Annuity Intelligence Report before reaching 100%.
- Need common tags assigned to the data points from Morningstar. This will allow the Morningstar AI data to populate any forms by leveraging common tags.

Admin Changes

When entering the credentials for Morningstar under the “Third Party Service Config” section of the Organization page, make sure you enter a Config Name for “Username”. See UI Mock Ups. Morningstar will provide you with your username and password.

UI Mock Ups

Morningstar

Suitability Form

Select Client Suitability Form

PFSMAI_AnnuityIntelligenceForm_v0218

Purchase Type

Is this sale replacing an existing VA?

☒ Yes
 ☐ No

Swap Contracts

Existing Contract Information

Select Current Contract

Accumulator 13.0 Series B

Proposed Contract Information

Select New Contract

Type contract or company name

Generate XML

Organizations

Add New Organization

FSE Base System	X
Geneos Wealth Management	X
Global Atlantic	X
Global Atlantic Financial Group	X
GPM Life	X
Gradient Financial	X

Third Party Service Configuration

Add New

Service Type	Config Name	Config Value	Update	Delete
1035YellowPages	Password	•••••	Update	Delete
Redtail CRM	Password	•••••	Update	Delete
Morningstar	Username	user1	Update	Delete

Edit Masks Add

Default Validation Placement

Submit Reminder Frequency

Agent Signing Order

Signature Fonts Click to Edit

Policy Block Settings Click to Edit

Third Party Service Config Click to Edit

Web Service Token Secret

Web Service Token Certificate Click to Edit

Web Service Token Expiration 1 Hours

New

Launch Morningstar

Field Properties

Name:

Top, Left:

Width, Height:

Tab Index:

Font Size:

Font Family:

Font Color:

Text:

Tool Tip:

Error Placement:

Protection:

Data Group:

Action Type:

Action Parameter:

Global Scope: ☒

Exclude from PDF: ☒

Office Use Only: ☐

Z Order:

How to Enable and Use This Feature

Once credentials have been added, the user will need to add a custom action button for Morningstar. This can be accomplished by adding a new button onto the desired form and selecting “Launch Morningstar” as the custom action. See UI Mock Ups. Now, you can launch into Morningstar from your application. You will be required to fill out the fields within Morningstar and click the “Generate XML” button. This will close the dialog and populate your form with common tags.

This does not include all common tags. Depending on the benefits the user selects, additional common tags may be included. Here is a list of the most common Data Items that are generated from the Morningstar report.

New Contract

"MS_NewContract_ProductIdentifier"	"MS_NewContract_ProductName"
"MS_NewContract_Vendor"	"MS_NewContract_ProductType"
"MS_NewContract_filePath"	"MS_NewContract_CDSC"
"MS_NewContract_VendorNm"	"MS_NewContract_ProductNm"
"MS_NewContract_BenefitName03"	"MS_NewContract_BenefitFee03"
"MS_NewContract_AdminAndDist"	"MS_NewContract_ShareType"
"MS_NewContract_DeathBenefitName"	"MS_NewContract_LivingBenefitName"
"MS_NewContract_DB_Fees_1"	"MS_NewContract_LBFees_1"
"MS_NewContract_CDSC_Schedule"	"MS_NewContract_ME_PlusPremium"
"MS_NewContract_CompleteFeeRange"	

Current Contract

"MS_CurrentContract_ProductIdentifier"	
"MS_CurrentContract_ProductName"	"MS_CurrentContract_Vendor"
"MS_CurrentContract_ProductType"	"MS_CurrentContract_filePath"
"MS_CurrentContract_CDSC"	"MS_CurrentContract_VendorNm"
"MS_CurrentContract_ProductNm"	"MS_CurrentContract_BenefitName03"
"MS_CurrentContract_BenefitFee03"	"MS_CurrentContract_AdminAndDist"
"MS_CurrentContract_ShareType"	"MS_CurrentContract_DeathBenefitName"
"MS_CurrentContract_LivingBenefitName"	"MS_CurrentContract_DB_Fees_1"
"MS_CurrentContract_LBFees_1"	"MS_CurrentContract_CDSC_Schedule"
"MS_CurrentContract_ME_PlusPremium"	"MS_CurrentContract_CompleteFeeRange"
"MS_CurrentContract_Step-Up Death Benefit"	"MS_CurrentContract_Standard Death Benefit"
"MS_CurrentContract_Minimum Initial Premium Benefit"	

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms	X	Creating a button with the “Launch Morningstar” custom action.
- Profile Administration	X	Add Morningstar credentials to the “Third Party Config” section on the Organizations page.
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application	X	Fill out the Morningstar UI sections in the popup
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		

- Commission Netting		
- Activity Reporting		