

iConnect 155962 – Redtail Design Approach

Project Overview

Update Redtail to use credentials from the application data.

Features/Requirements

- Set up a CRM button control and corresponding text fields on a form—can use a coversheet form.
- Set up the Redtail Provider.
- Set up a Username and Password for Redtail.


Admin Changes

Set up the CRM button control and corresponding text fields.

Integration Changes

Set up a Redtail Provider and a username and password for Redtail.

UI Mock Ups



FireLight® QE 2.10.0.117 John Client - Variable Annuity Fou. Home Other Actions Save Log Off

1 FORM ENTRY 89 % **2 SIGNATURES** **3 FINALIZE** **CONTINUE**

OPEN 155962-Coversheet Page 1

DEMO ONLY

Redtail Username Redtail Password

Get Client Info from Redtail

Client First Name: Last Name:

Producer First Name: Last Name:

Producer Number: Producer Phone:

Client Job Title:

Client Marital Status:

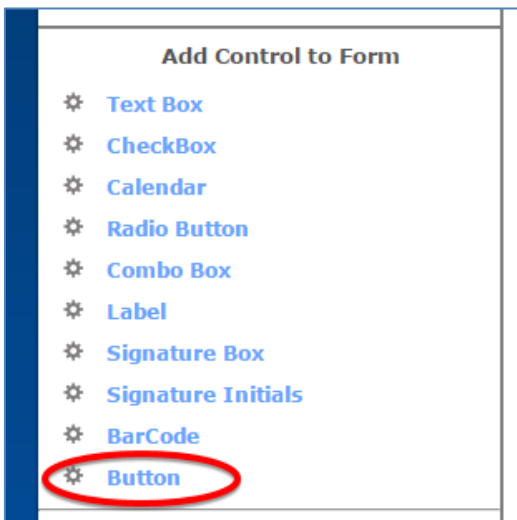
Client Date of Birth: Social Security Number:

Party Type:

How to Enable and Use This Feature

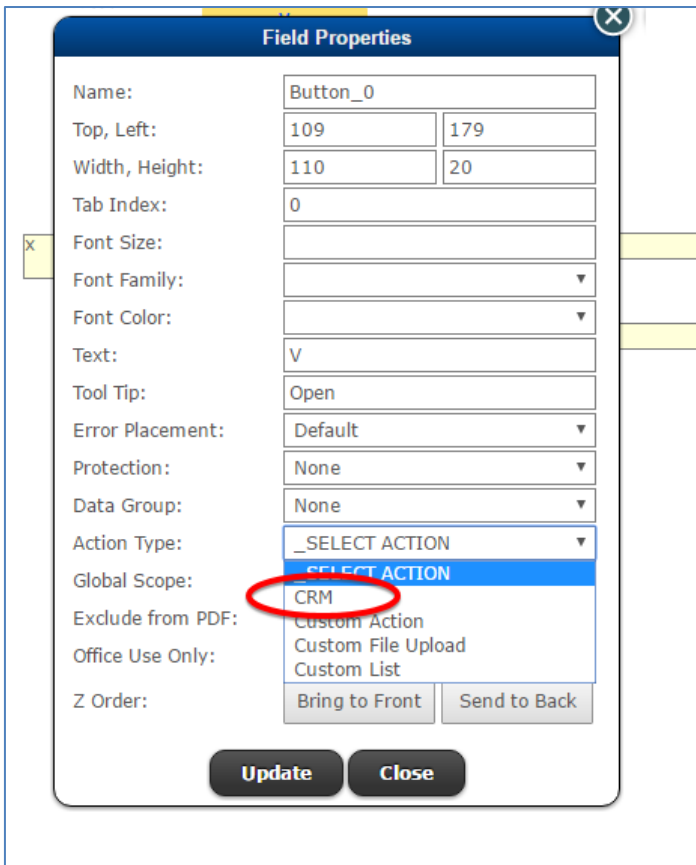
Step 1: Set Up the Form

- a. Create a CRM Button control.



Add Control to Form

- ✱ Text Box
- ✱ CheckBox
- ✱ Calendar
- ✱ Radio Button
- ✱ Combo Box
- ✱ Label
- ✱ Signature Box
- ✱ Signature Initials
- ✱ BarCode
- ✱ **Button**



Field Properties

Name:	Button_0	
Top, Left:	109	179
Width, Height:	110	20
Tab Index:	0	
Font Size:		
Font Family:		
Font Color:		
Text:	V	
Tool Tip:	Open	
Error Placement:	Default	
Protection:	None	
Data Group:	None	
Action Type:	_SELECT ACTION	
Global Scope:	<div> <div>SELECT ACTION</div> <div>CRM</div> <div>Custom Action</div> <div>Custom File Upload</div> <div>Custom List</div> </div>	
Exclude from PDF:		
Office Use Only:		
Z Order:	<div>Bring to Front</div> <div>Send to Back</div>	

Update **Close**

- b. Add a CRM Parameter that matches the Data Group of the corresponding fields. Make sure Data Group and Data Group Property are filled on all fields that need to be filled in. (Do not use 1035 in the CRM Parameter except for 1035CT intergration.)

Form Button:

Action Type:	CRM
CRM Parameter:	Owner

Corresponding Text Fields:

Data Group:	Owner
Data Group Property:	FirstName
Global Scope:	<input checked="" type="checkbox"/>
Multi Line:	<input type="checkbox"/>
Exclude from PDF:	<input type="checkbox"/>

Step 2: Set Up Redtail Provider

In the OrganizationAssembly Table, add an entry for assembly Type 8 (Crm).

To use default implementation use AssemblyName **InsTech.EverGreen.CRM** TypeName **InsTech.EverGreen.CRM.Redtail.RedtailCRM** and ConfigString **RedTail_Dev.config**.

Step 3: Set up a UserName and Password for Redtail

There are currently two ways to do it.

- Set Up the Username/Password in the Third Party Service Config in Org Settings. (Note: it will use the form's Organization if set up, not necessarily the distributor's or carrier's Organization.)

IDP Certificates (primary)	Click to Edit
IDP Certificates (backup)	Click to Edit
Policy Block Settings	Click to Edit
Third Party Service Config	Click to Edit

[Save Organization](#)

[Add New](#)

Config Name	<input type="text" value="UserName"/>
Config Value	<input type="text" value="RedTailUsername"/>
Service Type	<input type="text" value="Redtail CRM"/>

[Add New](#)

Third Party Service Configuration

Config Name	<input type="text" value="Username"/>
Config Value	<input type="text" value="RedTailUsername"/>
Service Type	<input type="text" value="Redtail CRM"/>

[Add Config](#)

[Add New](#)

Third Party Service Configuration

Config Name	<input type="text" value="Password"/>
Config Value	<input type="text" value="RedTailPassword"/>
Service Type	<input type="text" value="Redtail CRM"/>

[Add Config](#)

- b. Create Redtail data items on the form.

If both FLI_REDTAIL_USERNAME and FLI_REDTAIL_PASSWORD are populated, it will use those credentials for Redtail.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms	X	
- Profile Administration		
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- 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		