iConnect 118048 (Update Product) Design Approach

This iconnect item has two request. This document describes second request which is - automatically switch an active application over to a new product.

Workflow Changes

There is no change in normal workflow of the system in implementing this request.

Features/Requirements

- Switch an Active application over to a new product, if sales agreement expiration date is set and a replacement product exists on Sales Agreement page.

Admin Changes

- "Replace Product" field (Drop-down) will be added on Sales agreement page which is used to select new product.
- "Replace Product" drop-down will be enabled only when there is a value in "End" field i.e. when user set expiration date of sales agreement.
- "Replace Product" drop-down will show products with same annuity type of expiring product.
- "Replace Product" drop-down will show products with sales agreement set to true.

App Changes

- When an active application is opened then system will check the sales expiration date on the SA and if it is expired and a replacement product exists, switch over to the new product, change all of the forms, package, etc.
- A notification given to user that due to expiration of product, application is switched to a new product.

Assumption

- We assume that the replacement product will have the same jurisdiction list approval as the current product.

UI Mock Ups

Only Admin -> Sales Agreement page will be modified. A new field "Replace Product" will be added on Sales Agreement page.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- **Form Library**		
- **Design Forms**		
- **Profile Administration** - **Sales Agreement**	Yes	A new field ("Replace Product") will be added on Profile -> Sales Agreement. Add/Update feature affected on Sales Agreement page. One new column will be added to SalesAgreement table that will hold replacement product.
- **Reports**		
- **Deployment**		
FireLight App		
- **New Application**	Yes	Check for product expiration and hide expired product.
- **Edit Application**	Yes	When loading active application, we need to check sales agreement end date and if it expired, we need to replace it with new product. New product will contains new package, new forms and new field/rules. These new changes saved in database when user click on "Save" button in his application. Notification will show to user about product replacement.
- **Signature Process**		
- **Review Queue**		
- **Manual Review**		
- **User Preferences**		
- **Inbound Integration**		
- **Outbound Integration**		
- **PDF Generation**		

FireLight Console	Yes	Only notification will be shown to user about replacement of product. No other change need to be done as most of the changes belong to shared.
- **Windows O/S**		
- **iOS**		
- **Android**		
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Other Systems		
- **DTCC Integration**		
- **Commission netting**		
- **Activity Reporting**		