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
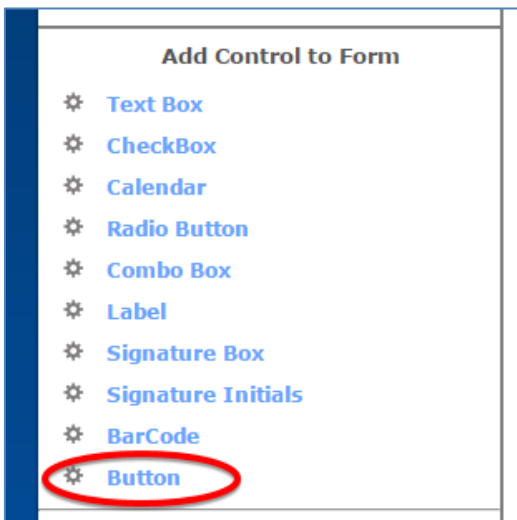
How to Enable and Use This Feature
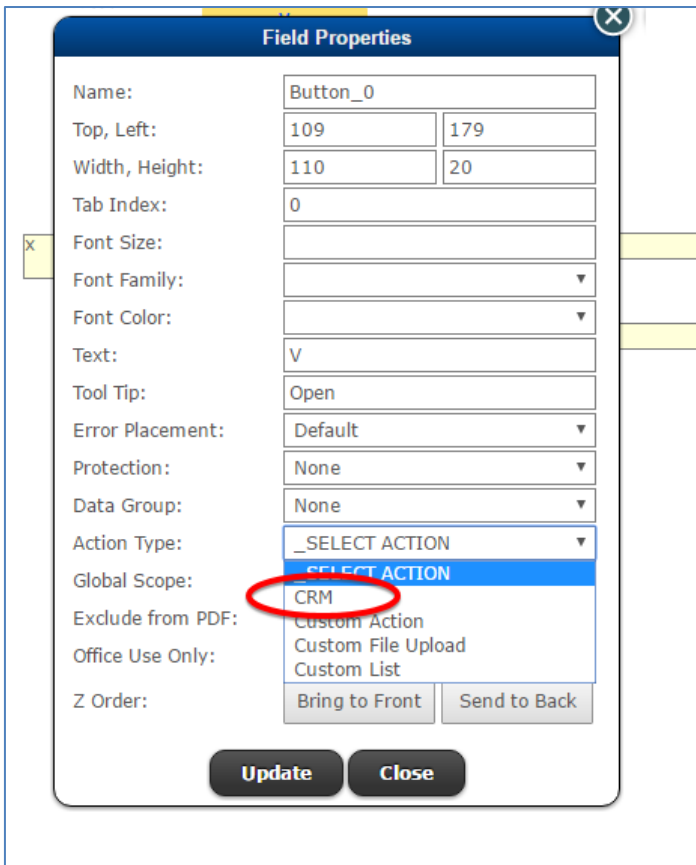
Step 1: Set Up the Form

a. Create a CRM Button control.

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 intergation.)

Form Button:

Corresponding Text Fields:

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.

    a. 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.)

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**		