
Sales Agreement Report

FIRELIGHT BASE

FireLight®

Platform

SALES AGREEMENT REPORT

Document Version: 1.x

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Insurance Technologies, LLC

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iConnect Design Approach - Sales Agreement Report

Project Overview

The request has been made to generate a new Sales Agreement report. This new report will capture more specific action that occurs through the Sales Agreement such as, what Distributor Org is being affected, The product name, if the Agreement is in True or False status, the packages assign to the Sales Agreement, time of Last Update and what State Jurisdictions are verified. With this enhancement a fourth option will need to be added to the Admin History reports icon on the reports page of Firelight. As with all reports, the user will be given the ability to select either a PDF or CSV version of this report

1 Addition of Sales Agreement Report option

The Sales Agreement Report option will need to be added to the report dropdown located under the Admin History Report button on the Reports page. As with the other report options in this dropdown, if Sales Agreement Report is selected along with the format of report (PDF or CSV) the Sales Agreement Report will generate.

Reports - Insurance Technologies

Insurance Technologies

Available Reports

Invoice

Agent Report

Form Field Report

Agent Activity

Agent Share Report

Application Audit

Package Forms Report

Package Rules Report

Agent Activity Firm Report

Agent Firm Report

Client Signed Report

Admin History Reports

Pending Agent Signature Report

Report Inputs

Organization: Insurance Technologies

Report: Package History Audit Report ▼

Select Option: Package History Audit Report

Product History Audit Report

Sales Agreement History Audit Report

Start Date: Sales Agreement Report

End Date: 2/19/2020

PDF ▼
 Generate

Acceptance Criteria

- Sales Agreement Report is now an option in the report dropdown of the Admin History Reports.
- Add new report option in dropdown list "Sales Agreement Report" on UI.

2 PDF version of Sales Agreement Report

As with the other reports the user will have the option on how the Report is displayed. With the Sales Agreement Report the following items need to be captured:

Distributor Organization

Product Name

If the Carrier Agreement is TRUE or FALSE

If the Distributor Agreement is TRUE or FALSE

State Approval

Assigned Packages

Last Updated

Example of PDF format:

Audit History Report

Organization: Insurance Technologies

Report Name: Sales Agreement Report

Report For: All Sales Agreement

Distributor Org	Product Name	Carrier Agreement	Distributor Agreement	State Approval	Assigned Packages	Last Updated
COS QE (Carrier)	Multiple Activities Test Product	True	N/A	AL,AK,AZ,AR,CA,CO,CT,DE,DC,FL,GA, GU,HI,ID,IL,IN,IA,KS,KY,LA,ME,MD,MA,MI,MN,MS,MO,MT,NE,NV,NH,NJ,NM,NY,NC,ND,OH,OK,OR,PA,PR,RI,SC,SD,TN,TX,UT,VT,VI,VA,WA,WV,WI,WY	Multiple Activities Package	2/12/2020 8:34:03 PM
COS QE (Carrier)	Multi-Signer Test-With Initials	True	N/A	AL,AK,AZ,AR,CA,CO,CT,DE,DC,FL,GA, GU,HI,ID,IL,IN,IA,KS,KY,LA,ME,MD,MA,MI,MN,MS,MO,MT,NE,NV,NH,NJ,NM,NY,NC,ND,OH,OK,OR,PA,PR,RI,SC,SD,TN,TX,UT,VT,VI,VA,WA,WV,WI,WY	Multi-Signer Test Package with Initials	2/12/2020 9:08:26 PM
COS QE (Carrier)	Account Opening Product 1	True	N/A	AL,AK,AZ,AR,CA,CO,CT,DE,DC,FL,GA, GU,HI,ID,IL,IN,IA,KS,KY,LA,ME,MD,MA,MI,MN,MS,MO,MT,NE,NV,NH,NJ,NM,NY,NC,ND,OH,OK,OR,PA,PR,RI,SC,SD,TN,TX,UT,VT,VI,VA,WA,WV,WI,WY AL,AK,AZ,AR,CA,CO,CT,DE,DC,FL,GA, GU,HI,ID,IL,IN,IA,KS,KY,LA,ME,MD,	Account Opening Package	2/24/2020 11:57:52 PM

Acceptance Criteria

- Sales Agreement Report generates as a PDF if selected.
- Generate new report in PDF format with described format.

3 CSV Version of Sales Agreement Report

Allow the user to generate the Sales Agreement report as a CSV file if they select this option.

As with the PDF version the following information must be included:

Distributor Organization

Product Name

If the Carrier Agreement is TRUE or FALSE

If the Distributor Agreement is TRUE or FALSE

State Approval

Assigned Packages

Last Updated

Example:

1	Key	Value					
2	OrgName	Insurance Technologies					
3	ReportName	Sales Agreement Report					
4	ReportFor	All Sales Agreement Report					
5							
6	Distributor Org	Product Name	Carrier Agreement	Distributor Agreement	State Approval	Assigned Packages	Last Updated
7	COS QE (Carrier)	Multiple Activities Test Product	TRUE	N/A	All Jurisdictions	Multiple Activities Package	2/12/2020 20:34
8	COS QE (Carrier)	Multi-Signer Test-With Initials	TRUE	N/A	All Jurisdictions	Multi-Signer Test Package with Initials	2/12/2020 21:08
9	COS QE (Carrier)	Account Opening Product 1	TRUE	N/A	All Jurisdictions	Account Opening Package	2/24/2020 23:57
10	Insurance Technologies	BR2 Prod	TRUE	N/A	All Jurisdictions	review pack	2/14/2020 12:59
11	Insurance Technologies	BR2 Prod	TRUE	N/A	All Jurisdictions	BR Pack	2/14/2020 12:59
12	Insurance Technologies	BR2 Prod	TRUE	N/A	All Jurisdictions	DEL Package	2/14/2020 12:59
13	Insurance Technologies	AM Annuity	TRUE	N/A	All Jurisdictions	AM Annuity	2/12/2020 17:22
14	Insurance Technologies	BR Prod 2	TRUE	N/A	All Jurisdictions	review pack	2/14/2020 7:24
15	Insurance Technologies	BR Prod 2	TRUE	N/A	All Jurisdictions	BR Pack	2/14/2020 7:24
16	Insurance Technologies	BR Prod	TRUE	N/A	All Jurisdictions	BR Pack	2/19/2020 9:15
17	Insurance Technologies	BR Prod	TRUE	N/A	All Jurisdictions	DEL Package	2/19/2020 9:15
18	Insurance Technologies	Term Period Edge	TRUE	N/A	All Jurisdictions	iSured Term EApp	2/19/2020 17:25
19	Insurance Technologies	Term Period Edge	TRUE	N/A	All Jurisdictions	iSured Term Illustration	2/19/2020 17:25
20	Insurance Technologies	Choice Plus Term	TRUE	N/A	All Jurisdictions	iSured Term EApp	2/19/2020 17:23
21	Insurance Technologies	Choice Plus Term	TRUE	N/A	All Jurisdictions	iSured Term Illustration	2/19/2020 17:23
22	Insurance Technologies	Select Term	TRUE	N/A	All Jurisdictions	iSured Term EApp	2/19/2020 17:24
23	Insurance Technologies	Select Term	TRUE	N/A	All Jurisdictions	iSured Term Illustration	2/19/2020 17:24

Acceptance Criteria

- Sales Agreement report generates as a CSV if selected.
- Generate new report in CSV format with described format.