

# iConnect 146337 Design Approach

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## Project Overview

This enhancement supports a workflow that allows a client to access the signing ceremony via a FireLight Client Signing Portal. Clients that do not have an email for remote signing, can go to this website, authenticate, and then sign. This will enable a client to sign their forms remotely without access to an email. This enhancement also supports Client Fill requests for clients that do not have access to email.

In addition, all external requests such as Client Fill, Review Request, Signature Request, will now contain the shortened link for the website URL.

## Features/Requirements

- Create a link that is short and readable over the phone.
- Redirect that link to the external Request.

## Use Cases / Workflow Changes

When any email for an external Request is generated (e.g., Client Fill and Sign, Review Request, Client Fill, Signature, Link to Download Application, etc.), create a short link and send that through email instead of the previous long URL.

For Client Fill or Client Sign requests to clients that do not have access to email, the agent can click the Generate Link Without Email button to create the short link and then communicate it to the client through phone or text.

## Admin Changes

No Changes

## App Changes

- Link is updated to a Short Link.
- New UI Change to display the Short Link.
- New Database to store the Short Links.
- New Web Service to serve the new Short Links.
- Client Fill or Signature requests will allow the user to generate links without email by clicking the Generate Link Without Email button.

New link:

ResendShare and InsertShareUser: Creating user Share link

The new short link will be generated for the following areas:

- Batch Manger: Review Request, Client Fill, Signature request

- Expiration Warning Service: Generates Link Based On Expiring Party Request (ClientFill, EApproval, ESignature)
- Send Signature Request for Fill and Sign: Send emails to other interested parties when fill and sign completed.
- Finalize Application: Link to Download Application
- UseEReview: Manual Review Queue Request
- Client Fill Email: Request to Client to Fill Application
- Client Fill And Sign Email: Request to Client to Fill and Sign.
- Client Email: Signature Request Email.

## UI Mock Ups

**Send Email To Client To Request Signatures**

Your client will receive an email message with instructions to complete the electronic application process.

Client Name:	<input type="text" value="Test"/>	Subject:	<b>New Application - wsTestProduct - Please complete your :</b>
Client Email:	<input type="text" value="tester@insurancetechnologie"/>		
Your Name:	<input type="text" value="IT TESTER FULLNAME"/>		
Your Email:	<input type="text" value="tester@insurancetechnologie"/>		
* Client Last 4 Digits of SSN:	<input type="text" value="1234"/>		
* Client Birth Date:	<input type="text" value="01/01/1905"/>		

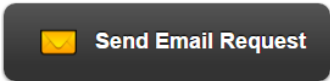
\* These values will not show in email.


Message:

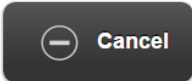
Dear Test,

Thank you for applying for 'wsTestProduct' of Insurance Technologies.


<http://www.northamericancompany.com>







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*New Signature Dialog*

1 FORM ENTRY

2 SIGNATURES

3 REVIEW

4 FINALIZE

### Request Another Person to Complete Filling the Forms

Your recipient will receive an email message with instructions to complete the electronic application process.

Recipient Name:	<b>TEst</b>	Subject:	<b>New Application - wsTestProduct - Please complete filling</b>
Recipient Email:	<b>tester@insurancetechnologie</b>		Dear TEst,
Your Name:	<b>IT TESTER FULLNAME</b>		line 1
Your Email:	<b>tester@insurancetechnologie</b>		line 2
* Client Last 4 Digits of SSN:	<b>1234</b>		IT TESTER FULLNAME
* Client Birth Date:	<b>01/01/1980</b>		

\* These values will not show in email.


Message:

Send Email Request

Generate Link Without Email

Cancel

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*New Client Fill Dialog*

1 FORM ENTRY

2 SIGNATURES

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### Request Another Person to Complete Filling the Forms

Your recipient will receive an email message with instructions to complete the electronic application process.

Recipient Name:	<b>TEst</b>	Subject:	<b>New Application - wsTestProduct - Please complete filling</b>
Recipient Email:	<b>tester@insurancetechnologie</b>		Dear TEst,
Your Name:	<b>IT TESTER FULLNAME</b>		line 1
Your Email:	<b>tester@insurancetechnologie</b>		line 2
* Client Last 4 Digits of SSN:	<b>1234</b>		IT TESTER FULLNAME
* Client Birth Date:	<b>1/1/1980</b>		

\* These values will not show in email.

Link Generated at 3/1/2017 5:49:54 PM.  
Please inform your recipient(s) to use Passcode **AzdNgfA3**  
Recipient(s) must use this link: **https://localhost/n53**

Back To App

*New Link Text.*

## How to Enable and Use This Feature

Automatically Enabled.

## Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		
<b>FireLight App</b>		
- New Application		
- Edit Application	Y	New Short Link Generation. Client Fill UI Changes.
- Signature Process	Y	Signature request UI changes
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
<b>FireLight Console</b>	N	
- Windows		
- iOS		
<b>Other Systems</b>	Y	New WebServer To Process Links.
- DTCC Integration		
- Commission Netting		

- Activity Reporting		
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