iConnect 153534 Design Approach

Provide a CRM option to access the Whitepage's API.

Workflow Changes

- Create a new CRM type for Whitepages.
- Add a new Custom Action option for Admin.
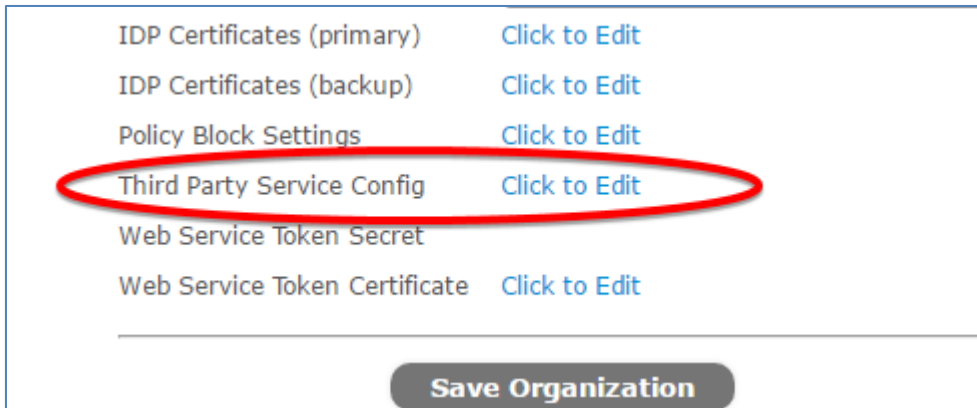- Make minor changes to the CRM dialog box for Whitepages.

Features/Requirements

- Allow User to call Whitepages API from the CRM.

Admin Changes

No Changes to Admin except for adding the Whitepages credentials.

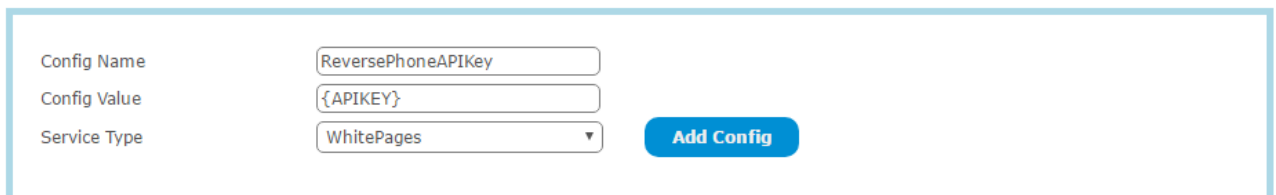1. In Admin, Organizations - Add ReversePhoneAPIKey in the Third Party Service Config.

2. The API Key is supplied to firms once the contracting is complete with Whitepages. Please contact Whitepages for your key or contact kdease@insurancetechnologies.com .
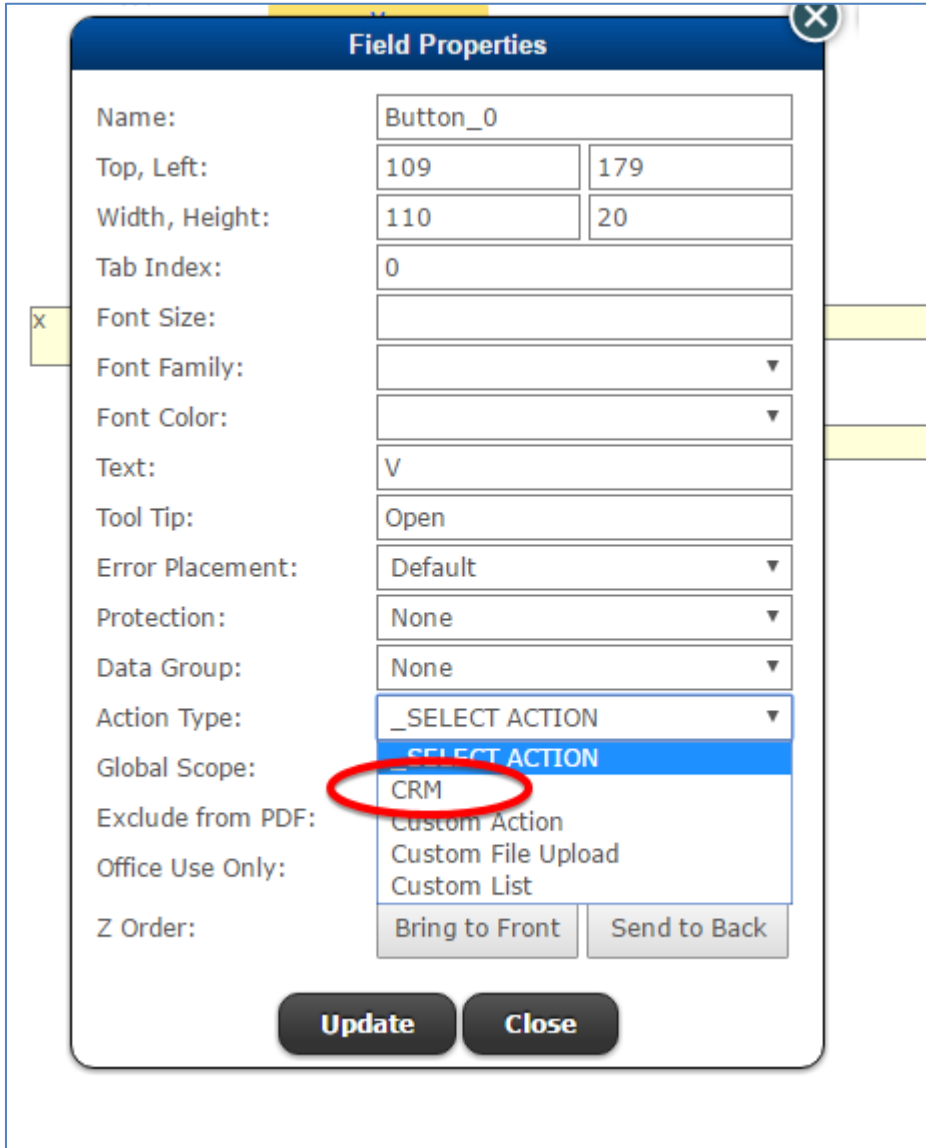
3. Create the CRM button control in FireLight Admin using the form Designer.
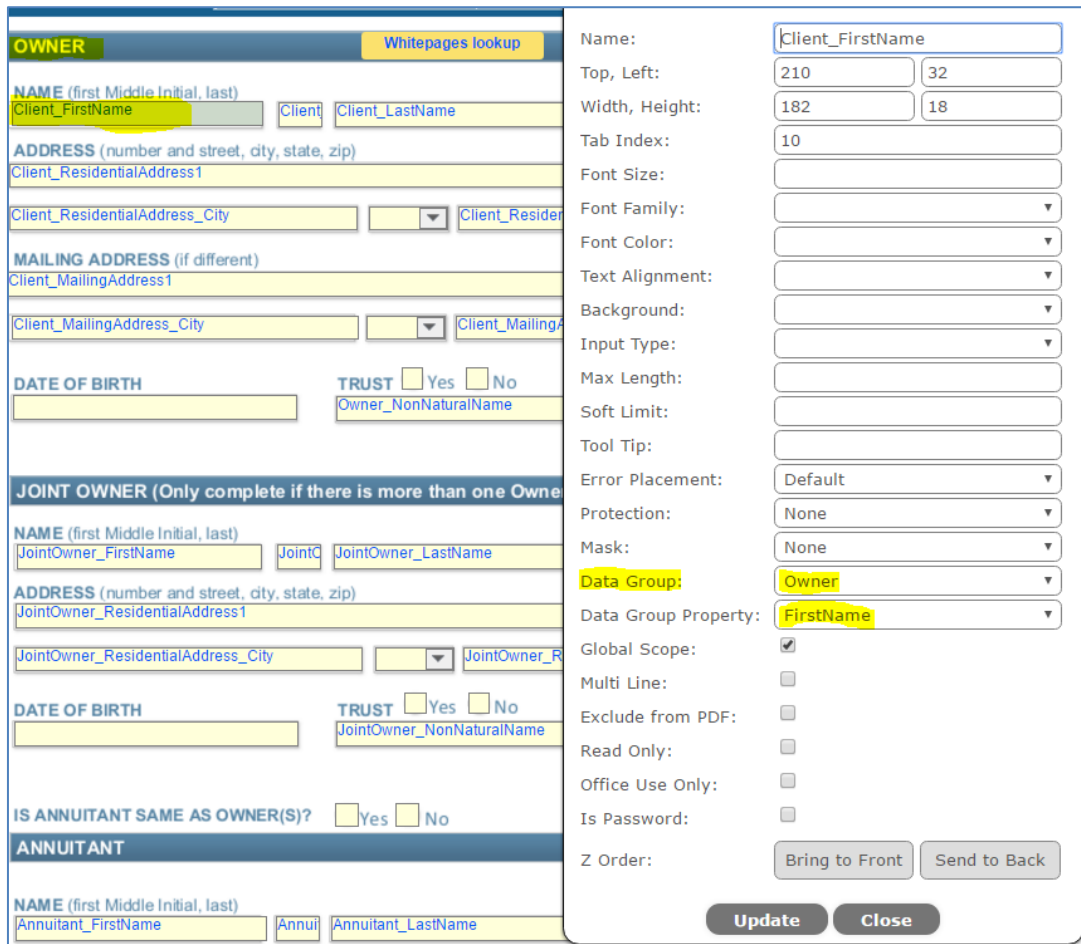
Set Action Type to CRM and set CRM Parameter to WP_[Prefix]. This determines the CRM Action is Whitepages.

4. All of the following fields are available to map. In order to pull in these values, you need to set the Data Group Property for each field.
   o FirstName
   o MiddleName
   o LastName (FullName for Businesses)
   o Gender
   o DiaNumber
   o AreaCode (LineType is mapped in this field)
   o Line1
   o Line2
   o City
   o AddressStateTC
   o Zip
5. To set the data group properties, open a form field that you want to map.
   a. The **Data Group** should be set to that person type for this set of data (Owner = owner, Annuitant = Annuitant, Beneficiary = Beneficiary, etc). In other words, the Data Group will assign whose data is being pulled.
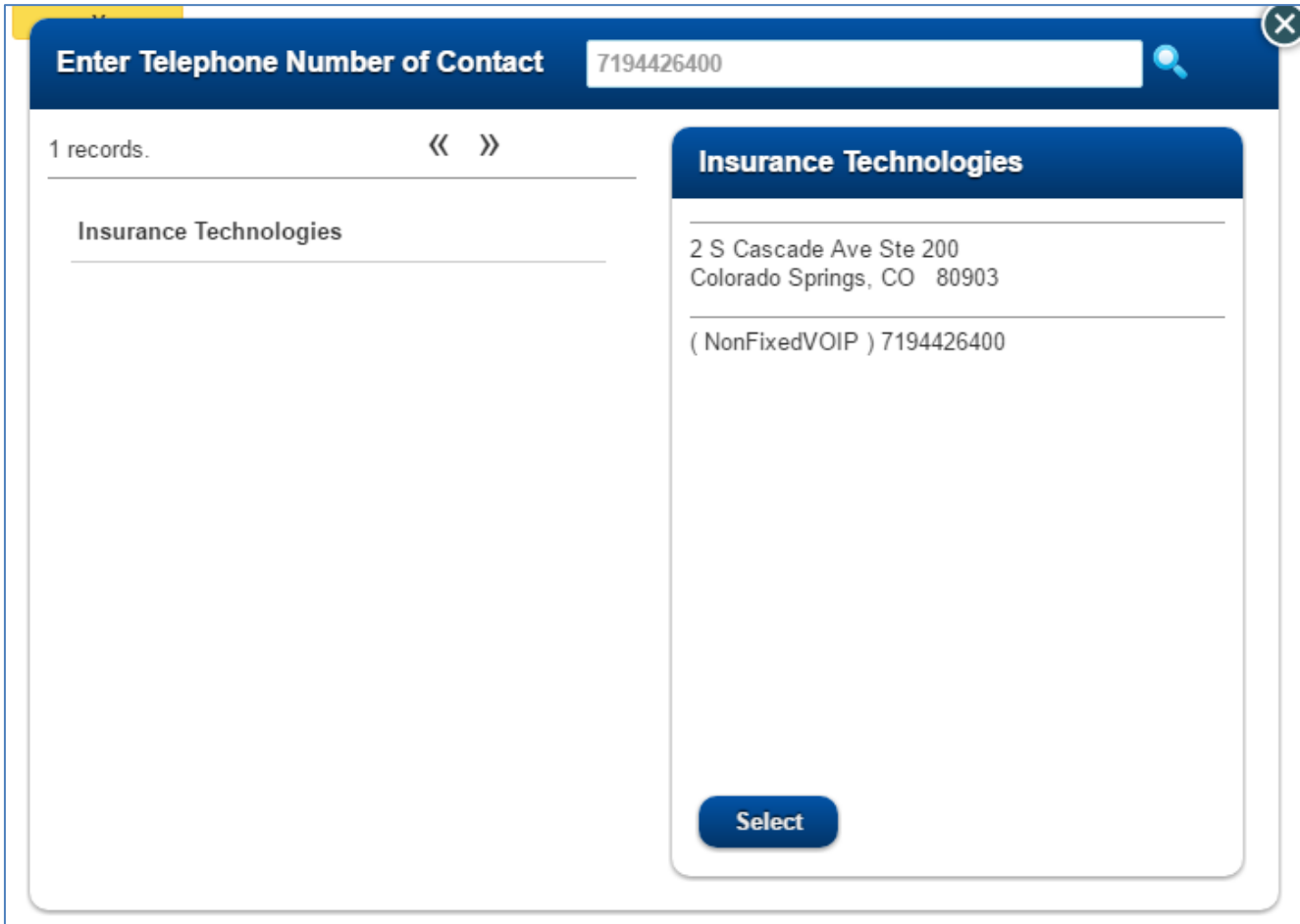   b. Then set the **Data Group Property** to define what data to pull from Whitepages.

App Changes

Minor changes were made to the CRM dialog box to allow the User to look up a Contact from the Phone Number.

Enter Telephone Number of Contact Telephone Number

0 records. 《 》

Select

The User enters a phone number and clicks the Search button to show the results. User Clicks the Select button to populate the corresponding fields on the form.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- **Form Library**		
- **Design Forms**	Y	CRM Parameter now takes into account WP_ prefix
- **Profile Administration**		
- **Reports**		
- **Deployment**		

FireLight App		
- **New Application**		
- **Edit Application**	Y	CRM Dialog Changes
- **Signature Process**		
- **Review Queue**		
- **Manual Review**		
- **User Preferences**		
- **Inbound Integration**		
- **Outbound Integration**		
- **PDF Generation**		
FireLight Console		
- **Windows O/S**		
- **iOS**		
- **Android**		
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Other Systems		
- **DTCC Integration**		
- **Commission netting**		
- **Activity Reporting**		