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# Multi-Activity Functionality

# **FIRELIGHT BASE**

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**MULTI-ACTIVITY FUNCTIONALITY**

**Document Version: 1.x**

**Published: March 24, 2020**

**Insurance Technologies, LLC**

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## Design Approach - Multi-Activity Functionality

Multi-App functionality's objective is simplifying the creation of multiple applications in a single sale scenario. This Multi-App functionality would generically fall under a Pre-Sale Activity. Because of the unique characteristics of this workflow, it will likely need to be a unique activity/transaction type rather than being implemented as a configurable pre-sale. When multiple applications are going to be taken during a single sales appointment process, the multi-app pre-sale will allow users to:

Transfer data items in that were collected in another pre-sale activity, i.e, Suitability.

Enter demographic and potentially medical information on participant(s) one time and be able to apply that information to multiple applications without reentering that information for each application.

System should allow import of information from supported CRM systems

System should allow participant(s) to have different roles relative to each new application created, i.e. an individual may be owner and/or insured on one application and a beneficiary on another

Child application should allow for entry of information on individuals (natural and non-natural) that were not included in original listing of participants in the group, i.e. the participants may have been members of a family, but the user wants the beneficiary of a contract to be a trust.

Identify multiple new applications that they want to create

Leverage existing Create New Application Page in FireLight; Jurisdiction, Product Type, Carrier, Locale, Product, etc. with minor modification

Support client defined wizard/forms functionality for selection of participant(s) roles relative to each application to be created

Support selection of participant(s) from dropdowns for each role identified in the child application wizard/forms

When all party information has been entered and preliminary product applications are identified, selecting Continue will pass party and related data to the child application through use of json. When changes are made to the parent/multi-app activity, selecting "Update" will pass these changes to the child applications.

On selection of the Create/Update Application button in the pre-sale activity:

Any party data will be passed to the child applications identified in the pre-sale activity

All child application will be associated/linked to the parent pre-sale activity

All data identified in the parent activity will be passed to the child application and will be available to populate fields of specific roles in the child application through an auto-fill functionality described later in this document.

If applications already exist from a prior session, updates/changes to data items in the parent activity will be transmitted to the child apps

A control will be provided in the parent activity to allow for deletion of a child application

Review Queues will be supported in this pre-sale activity

Web service calls, i.e. Can Sell will be supported in this pre-sale activity

## **1 Application: Pre-Sale Multi-Activity Data Storage, Mapping, and Update**

### **1.1 Application: Multi-Activity Party Data Storage**

#### ***Acceptance Criteria***

- Payload must persist between sessions and reloading the activity.
- Payload must be updatable from parent app.
- Payload must have Properties to identify which each input field is which.

### **1.2 Application: Multi-Activity Child App Auto-Fill Custom Action Data Mapping**

Party Data will be collected on multiple individuals to be associated with roles on applications later in the process. Collection of data will follow FireLight common tagging structure and will begin with "Party\_x\_" Depending on the number of parties collected, the number will increment appropriately.

Fields collected for parties will be tagged similarly to common fields collected for roles of individuals associated with insurance contracts in the roles of Applicant, Annuitant, Insured, Owner, Beneficiary, Payer, etc. The only difference will be the "Party\_X" prefix.

Data collected on parties will not be limited to demographic data. Data could also include medical underwriting information. How much information and what types of information will be dependent on the client's wizard/form design. This information may also be the response of a web service call from within the multi-app data collection, i.e. retrieval of a Group ID that will be used to associate all applications created as part of this process.

Data collected per party in the pre-sale multi-app activity (the parent) will need to be stored in such a way that it is available in each of the product applications (child activities). Selection of a custom action button for each of the roles in the child activities will display a selection list that includes each of the parties entered in the parent activity. Parties will be listed by Full Name (First Name and Last Name) or Entity Name. Selection of a party from that list will trigger mapping of party data to all corresponding fields in the child application.

Data can be mapped several ways, depending on the implementation and organizations involved and whether or not common tags have been used. Data can be mapped field by field, through groups, or through the provider as currently supported in FireLight. New functionality is being added to replace the prefix to be used in multi-app party collection - Party\_"x" with the prefix of the role identified. For example Party4\_FirstName will be changed to Applicant\_FirstName and the data mapped to the first name field in the form/wizard.

#### ***Acceptance Criteria***

- Data for party selected is mapped to the corresponding fields associated with a specific application role.

### **1.3 Application: Multi-App Auto-Fill Custom Action**

Auto-Fill Custom Action buttons will be located near fields in Forms/Wizards associated with Roles of individuals in an activity

Selection of the "Auto-Fill" button will display a list of the parties entered in the parent activity by first and last name.

Selection of an individual in the list will map the party information to the role specific fields corresponding to the party data.

#### ***Acceptance Criteria***

- Selection of the "Auto-Fill" button will display a list of the parties entered in the parent activity by first and last name.
- Selection of an individual in the list will map the party information to the role specific fields corresponding to the party data.

## 2 Admin: Pre-Sale Multi-Activity

The Multi-Activity pre-sale will allow the collection of Party information of individuals and entities (trusts, etc) that may be associated with specific roles in the multiple activities that may be generated from this pre-sale module. This data collection may be done through either legacy form or wizard functionality.

### 2.1 Admin: Multi-Activity Auto-Fill Custom Action

Add to the admin tool the ability to add a custom action button specific to "Auto-Fill" functionality related to Party information and Multi-App. This custom action button will be able to be associated with role specific fields through selection or entry of a role prefix.

Add Multi-App Auto-Fill Option to Custom Action Field Properties Dialog

**FOR PROPOSED INSURANCE**

**Field Properties**

Field Name:	<input type="text" value="Auto_Fill"/>	
Top, Left:	<input type="text" value="15"/>	<input type="text" value="15"/>
Width, Height:	<input type="text" value="20"/>	<input type="text" value="20"/>
Tab Index:	<input type="text" value="0"/>	
Font Size:	<input type="text" value="0"/>	
Font Family:	<input type="text"/>	
Font Color:	<input type="text"/>	
Text:	<input type="text" value="Auto-Fill"/>	
Help Text:	<input type="text" value="Open"/>	
Error Placement:	<input type="text" value="Default"/>	
Protection:	<input type="text" value="None"/>	
Data Group:	<input type="text" value="None"/>	
Action Type:	<input type="text" value="Multiple Activities Auto-Fill"/>	
Auto-Fill Prefix:	<input type="text"/>	
Global Scope:	<input type="text"/>	
Exclude from PDF:	<input type="text"/>	
Office Use Only:	<input type="text"/>	
Z Order:	<input type="text"/>	

**\_SELECT ACTION**

CRM

Custom Action

Custom File Upload

Custom List

**Multiple Activities Auto-Fill**

Upload Provider Document

Add Field for Entry of Auto-Fill Prefix if Multi-App Auto-Fill is selected as Custom Action Type

Field name added with be "Auto-Fill Prefix"

Entry of the role prefix, i.e. "Insured", in this field will substitute that prefix for the "Party\_X" tag data saved as part of multi-app functionality. This data will then populate the corresponding fields in the form/wizard package.

Support autocomplete of prefix text field



**FOR PROPOSED INS**

**Field Properties**

Field Name:	Auto_Fill	
Top, Left:	15	15
Width, Height:	20	20
Tab Index:	0	
Font Size:	0	
Font Family:	▼	
Font Color:	▼	
Text:	Auto-Fill	
Help Text:	Open	
Error Placement:	Default ▼	
Protection:	None ▼	
Data Group:	None ▼	
Action Type:	Multiple Activities Auto-Fill ▼	
Auto-Fill Prefix:	Annuitant	
Global Scope:	<input checked="" type="checkbox"/>	
Exclude from PDF:	<input checked="" type="checkbox"/>	
Office Use Only:	<input type="checkbox"/>	
Z Order:	<div style="display: inline-block; border: 1px solid black; padding: 2px 10px; margin: 2px;">Bring to Front</div> <div style="display: inline-block; border: 1px solid black; padding: 2px 10px; margin: 2px 5px;">Send to Back</div>	

Update

Close

### Acceptance Criteria

- New option of "Multi-App Auto-Fill" added to Action Type dropdown in Field Properties dialog for buttons.

- New text field named "Auto-Fill Prefix" added to Field Properties dialog for buttons.
- Entries/selections saved
- Auto-Fill prefix needs autocomplete library

## 2.2 Admin: Multi-Activity Transaction Type

Create an activity/transaction type of Multi-Activity with ACORD Activity Type ID 1204.

Configure database

Code changes to add the transaction type

icon in fontawesome defaulted for this activity type. <https://fontawesome.com/icons/layer-group?style=solid>

### ***Acceptance Criteria***

## 2.3 Admin: Multi-Activity Party Creation

The Multi-Activity pre-sale module will allow the collection of Party information of individuals and entities (trusts, etc) that may be associated with specific roles in the multiple activities/product applications that may be generated from this pre-sale module. This data collection may be done through either legacy form or wizard functionality.

Define Common Tagging convention for Parties in Multi-Activity Pre-Sale

Party1\_(common tag remainder), Party"N", etc.

Party Common Tags will be available for selection in dropdowns in the admin tool

### ***Acceptance Criteria***

- Begin typing Party in in the "Name" field in the field properties and the Party common tags will be available.

## 3 Application: Pre-Sale Multi-Activity UI

The primary objective of the multi-app pre-sale is to collect data on multiple parties (natural and non-natural) and identify multiple applications for creation. Party information is not role specific relative to each of the applications to be created. The user will be able to select the parties created in the pre-sale while in the application. Any/All data collected in the pre-sale will be mapped into the application for the role selected. Each party can be selected for multiple and different roles in each of the applications created. But, the data for each party will only have been manually entered once.

Data capture is not limited to Party data and Product Selection. Organizations can define additional data collection and that data can be mapped to child applications. The use of this functionality will require use of common tags between the parent and child activities.

The Multi-App Pre-Sale will support all the standard functionality for data collection in FireLight:

Form and/or Wizard Collection

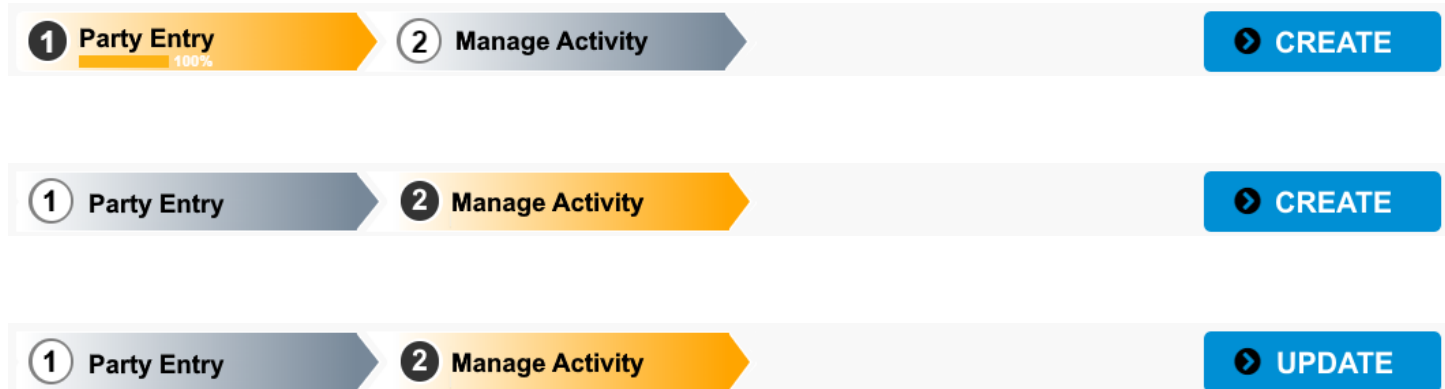
Webservice/API calls

Review Queue

Signatures, if necessary

Etc.

### 3.1 Application: Multi-Activity Subway Changes



Create Applications should it be its own subway stop

Add naming flexibility to subway navigation appropriate to the pre-sale activity.

The "Continue" button should change to "Update" if it is an existing Multi-App to which changes have been made that require an action be taken to update child apps/activities.

### Acceptance Criteria

- Subway Stops unique to Multi-Activity are Party Entry, Manage Activity, and Create/Update
- On initial entry, button on right is presented as "Create"
- If changes are made to party information or requested/removed applications, then the button is changed to "Update"

## 3.2 Application: Multi-Activity Child App Auto-Fill Custom Action

Auto-Fill button may be presented beside data collection fields for a specific role in a form/wizard. Or, it may simply be presented on a cover page.

A. APPLICANT		Auto-Fill
Name (First, Middle, Last)	Date of Birth (Mo - Day - Yr)	
Street Address	City	State ZIP Code
SSN / TIN	Member Number	Council Number
Citizen of the United States <input type="checkbox"/> Yes <input type="checkbox"/> No		
If No	Country of Citizenship	Country of Permanent Residence
Phone Number	Email address	

Selecting Auto-Fill button beside Applicant Will open selection list of Parties

A. APPLICANT		Auto-Fill
Name (First, Middle, Last)	Bob Smith	Date of Birth (Mo - Day - Yr)
Street Address	Mary Smith	City State ZIP Code
SSN / TIN	John Smith	Council Number
Citizen of the United States <input type="checkbox"/> Yes <input type="checkbox"/> No	Jenny Smith	
If No	Jeremy Smith	Country of Permanent Residence
Phone Number	Molly Smith	
	Smith Family Trust	

Selection of Bob Smith from the list above will map the Party values to the Applicant fields below.

A. APPLICANT <span>Auto-Fill</span>				
Name (First, Middle, Last)		Date of Birth (Mo - Day - Yr)		
Bob Smith		01/01/1960		
Street Address		City	State	ZIP Code
123 Pine		Monument	CO	80132
SSN / TIN	Member Number		Council Number	
555-55-5555				
Citizen of the United States <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No				
If No		Country of Citizenship	Country of Permanent Residence	
			UNITED STATES	
Phone Number		Email address		

### Acceptance Criteria

- Selection of an "Auto-Fill" button will result in all parties collected in the parent multi-app pre-sale being presented in a selection list/dropdown.
- Selection of a party from that list will populate data collected on that party in the parent activity to the corresponding fields for the role selected
- Fields populated through Auto-Fill will be set to read only, thereby requiring the user to return to the Parent activity to edit data.
- Party Data will be collected on multiple individuals to be associated with roles on applications later in the process. Collection of data will follow FireLight common tagging structure and will begin with "Party"x"\_" Depending on the number of parties collected, the number will increment appropriately.
- 
- Fields collected for parties will be tagged similarly to common fields collected for roles of individuals associated with insurance contracts in the roles of Applicant, Annuitant, Insured, Owner, Beneficiary, Payer, etc. The only difference will be the "Party"X"\_" prefix.
- 
- Data collected on parties will not be limited to demographic data. Data could also include medical underwriting information. How much information and what types of information will be dependent on the client's wizard/form design. This information may also be the response of a web service call from within the multi-app data collection, i.e. retrieval of a Group ID that will be used to associate all applications created as part of this process.
-

- Data collected per party in the pre-sale multi-app activity (the parent) will need to be stored in such a way that it is available in each of the product applications (child activities). Selection of a custom action button for each of the roles in the child activities will display a selection list that includes each of the parties entered in the parent activity. Parties will be listed by Full Name (First Name and Last Name) or Entity Name. Selection of a party from that list will trigger mapping of party data to all corresponding fields in the child application.
- 
- Data can be mapped several ways, depending on the implementation and organizations involved and whether or not common tags have been used. Data can be mapped field by field, through groups, or through the provider as currently supported in FireLight. New functionality is being added to replace the prefix to be used in multi-app party collection - Party"x"\_ with the prefix of the role identified. For example, Party4\_FirstName will be changed to Applicant\_FirstName and the data mapped to the first name field in the form/wizard.
- 
- Data for party selected is mapped to the corresponding fields associated with a specific application role.

### 3.3 Application: Multi-Activity Update - Child Activities

Multi-App activity will support the collection of Party data to be used in child activities. When changes are made to these data items in the Multi-App/Parent activity, corresponding fields to which data has been mapped in child activities will be updated with the change. This presumes that the child activity has not been locked. If a child activity is not open at the time the update is made/requested, the update will occur the next time the child activity is opened.

Changes/updates to child activities that must be supported in Multi-App also includes deletion of a child activity.

While in the Multi-App/Parent Activity, if changes are made that require an update to, or removal of a child activity, the label on the "Create" button should change to "Update".

If the user navigates away from the parent activity without having selected "Update", the system will automatically save/update the parent activity so that the new data is available to the child activities when next opened. This will be true however the user navigates away from the parent; going to home, through open activities, through the linked activities dialog, etc.

**1 Party Entry**
**2 Manage Activity**
**▶ UPDATE**

### ***Acceptance Criteria***

- When changes are made to the parent activity...
- User is notified that an update is required
- "Create" button Changes to "Update"
- Selecting "Update" changes the corresponding role-specific data items to which party data was mapped
- Selecting "Update" deletes child activities/applications that were flagged for removal in the parent
- Party Data will be collected on multiple individuals to be associated with roles on applications later in the process. Collection of data will follow FireLight common tagging structure and will begin with "Party"x"\_ Depending on the number of parties collected, the number will increment appropriately.
- 
- Fields collected for parties will be tagged similarly to common fields collected for roles of individuals associated with insurance contracts in the roles of Applicant, Annuitant, Insured, Owner, Beneficiary, Payer, etc. The only difference will be the "Party"x"\_ prefix.
- 
- Data collected on parties will not be limited to demographic data. Data could also include medical underwriting information. How much information and what types of information will be dependent on the client's wizard/form design. This information may also be the response of a web service call from within the multi-app data collection, i.e. retrieval of a Group ID that will be used to associate all applications created as part of this process.
- 
- Data collected per party in the pre-sale multi-app activity (the parent) will need to be stored in such a way that it is available in each of the product applications (child activities). Selection of a custom action button for each of the roles in the child activities will display a selection list that includes each of the parties entered in the parent activity. Parties will be listed by Full Name (First Name and Last Name) or Entity Name. Selection of a party from that list will trigger mapping of party data to all corresponding fields in the child application.
-

- Data can be mapped several ways, depending on the implementation and organizations involved and whether or not common tags have been used. Data can be mapped field by field, through groups, or through the provider as currently supported in FireLight. New functionality is being added to replace the prefix to be used in multi-app party collection - Party"x"\_ with the prefix of the role identified. For example, Party4\_FirstName will be changed to Applicant\_FirstName and the data mapped to the first name field in the form/wizard.
- 
- Data for party selected is mapped to the corresponding fields associated with a specific application role.
- 
- If the user initiates navigation away from Multi-Activity, e.g. to home page, another open activity, through linked activity dialog, or closing the case, present the following default message "Changes have been made to this activity. Select "Update" to apply those changes to linked activities."

### 3.4 Application: Multi-Activity Manage Activity Add Activity Grid

On the Manage Activity Page...

Add "Add Application" Button

Selection of this button will navigate to the organization's existing Jurisdiction, Product Type, Product selection page

"Remove" checkbox in application listing/grid

Selection of "Remove" and subsequent update of the multi-app activity will delete the application selected for removal from the system



FireLight®

Smith Pre-Sale Activity Name

Home
Other Actions
Save
Save As
Training
Log Off

1 Party Entry
2 Manage Activity

UPDATE

Applications
Applications

Products

Carrier	Product	Application Name	Remove
Knights of Columbus	874 - 20 Year Accelerated Term	Bob Smith - Term Life Policy	<input type="radio"/>
Knights of Columbus	808 - Graded Premium Whole Life	Bob Smith - Whole Life	<input type="radio"/>
Knights of Columbus	807 - The Discoverer	Mary Smith - Life Policy	<input type="radio"/>
Knights of Columbus	960 - FPA - SEP, IRA, TSA or Non Qualified - Billable	Bob's Annuity	<input type="radio"/>
Knights of Columbus	981 - SPDA Vantage - Exchange/Internal Funds - Non Billable	Bob and Mary Annuity	<input type="radio"/>

Application
Needs Determination
E-Delivery
Pre-Suitability
Application
Guided Illustration
Illustration
Agent Assignment
Post Issue
Subpay
Fee Inquiry
Quote
Print Forms
Account Opening
New Licensing

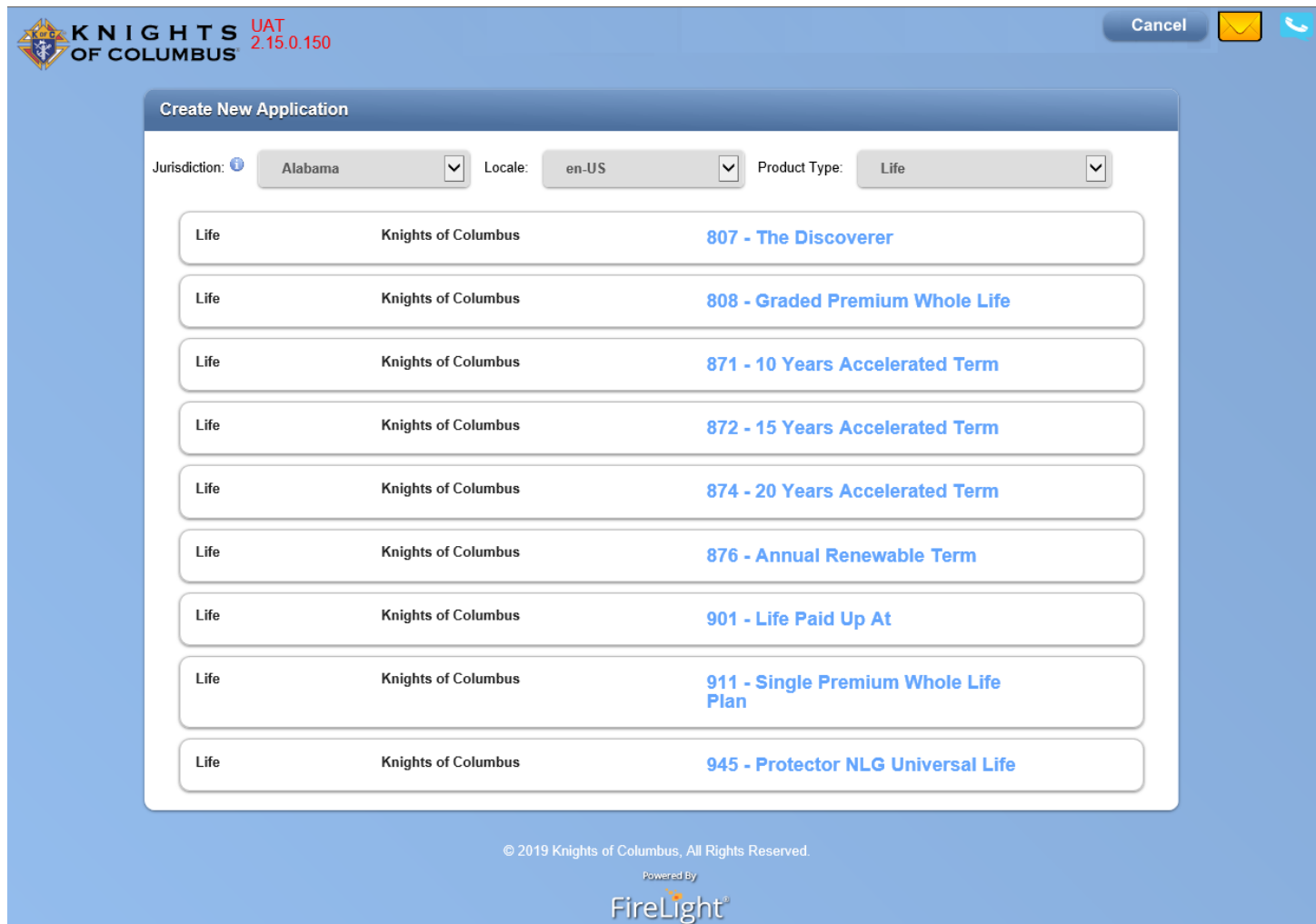
Add Activity

Application creation reuses the current process with two exceptions

There are two differences between this page and the current "Create New Application" Page

The only navigation button at the top will be "Cancel"

Selecting "Cancel" will take them back to the Multi-App module



**KNIGHTS OF COLUMBUS** UAT 2.15.0.150

Cancel

**Create New Application**

Jurisdiction: Alabama Locale: en-US Product Type: Life

Life	Knights of Columbus	807 - The Discoverer
Life	Knights of Columbus	808 - Graded Premium Whole Life
Life	Knights of Columbus	871 - 10 Years Accelerated Term
Life	Knights of Columbus	872 - 15 Years Accelerated Term
Life	Knights of Columbus	874 - 20 Years Accelerated Term
Life	Knights of Columbus	876 - Annual Renewable Term
Life	Knights of Columbus	901 - Life Paid Up At
Life	Knights of Columbus	911 - Single Premium Whole Life Plan
Life	Knights of Columbus	945 - Protector NLG Universal Life

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Naming the Application and "Create"

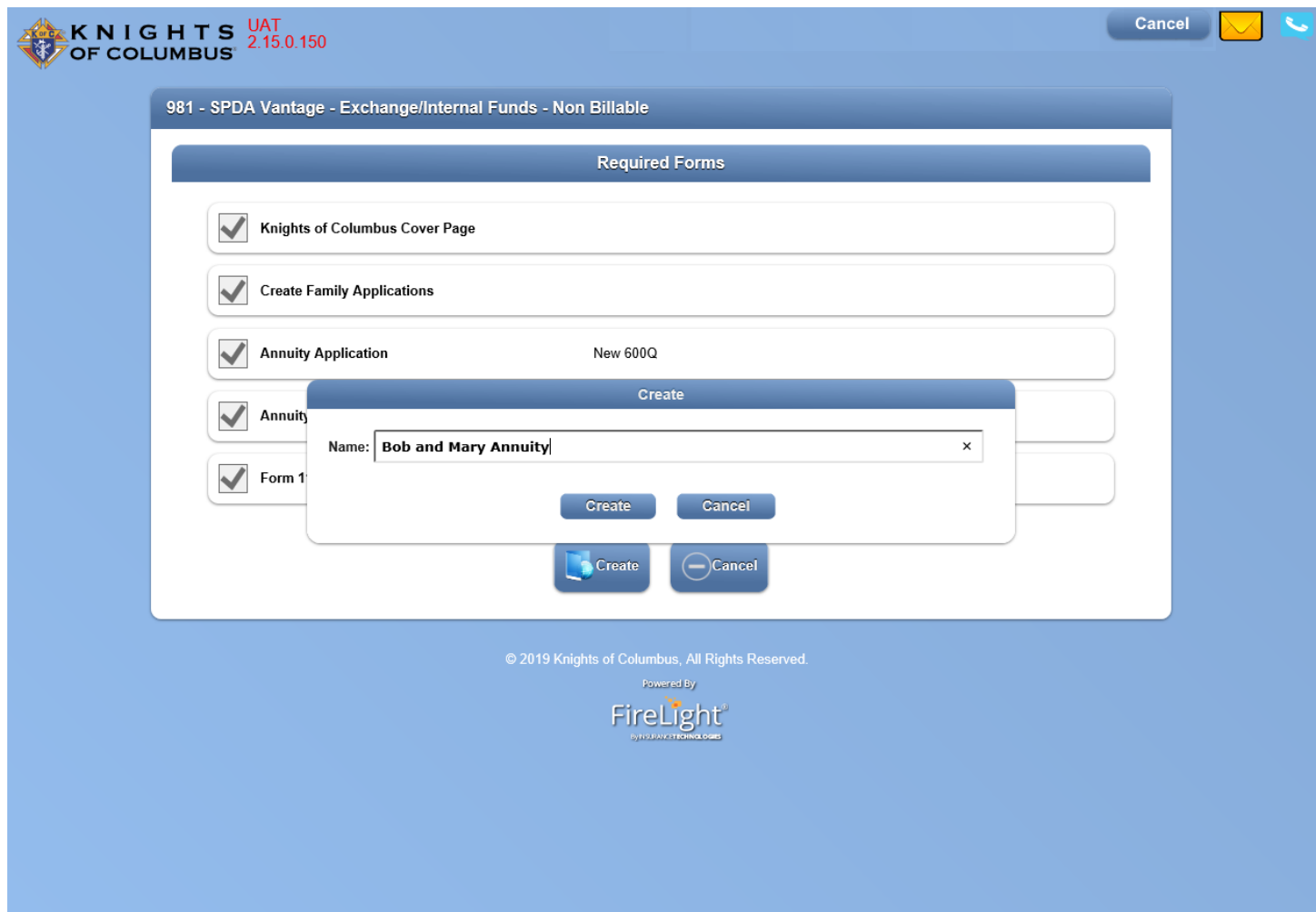
Selecting "Create" will trigger the following

Can-Sell or any other Web-Service Calls, if any

Creation of the application

Navigate the user back to the Applications page in the Multi-App activity

Addition of the newly created application to the application grid



981 - SPDA Vantage - Exchange/Internal Funds - Non Billable

**Required Forms**

- ☒ Knights of Columbus Cover Page
- ☒ Create Family Applications
- ☒ Annuity Application New 600Q
- ☒ Annuity
- ☒ Form 1

**Create**

Name:

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### Acceptance Criteria

- "Add Activity" button launches appropriate new activity page
- Functionality identical to current new activity functionality
- Only navigation option outside of activity creation is "Cancel"
- "Cancel" discards selections and returns the user to the "Manage Activity" step/page
- After Activity is named and "Create" is selected, user is returned to the "Manage Activity" step/page and the last application created appears at the bottom of the grid
- Remove Checkbox/Button added to the right of Application Name
- Columns present in grid are Carrier, Product, Application Name, and Remove
- If changes are made to Party Data, new applications added, or applications selected for removal, then change Continue

### 3.5 Application: Multi-Activity UI Party Collection



Just as the organizations has full control and flexibility in the definition and creation of data collection for applications in FireLight, the organization will define the party information to be collected in Multi-Activity.

The number of parties for which data will be collected will be defied by the organization. From a best practice perspective, organizations must follow the common tagging format/model for all party information to be collected. Because roles related to specific products/activities are not defined until the activities have been created, the data will be collected generically, i.e. Party1\_FirstName.

Adherence to common tag format will facilitate mapping of data to role-specific fields in individual activities; particularly in multi-carrier/distributor implementations.

All of the commonly supported form/wizard design functionality will be available in multi-activity party collection.

Multi-app will be a parent activity to child/product applications. Data collected or changed in the parent activity will need to be passed to all child applications. If there are changes made to the parent activity, the user should be notified that an update action is required to update the child applications. A combination of messaging and a change of the "Create" button to "Update" will facilitate this process.



#### ***Acceptance Criteria***

- The same data collection functionality that FireLight can currently support is supported in multi-activity party collection.

- If changes are made to the parent activity, the "Create" button will change to "Update" and messaging will notify the user that an update is required to keep the content of the child apps in sync with the parent.