

iConnect 126576- Use Agent Email for Outgoing Email Messages

Workflow Changes

None

Features/Requirements

To provide on the User Preference page an option that would allow an agent to set the email address to their own email regardless of the user currently logged into the system. This would affect the From Email Address and Name on agent initiated emails, and the To Email Address and Name on system generated emails that are sent to the agent owning the application.

1. Application approved/rejected from Review Queue.
2. Request for additional information from Review Queue.
3. Client Fill request and Signature request completed.
4. E-Approval (Manual Review) approve/reject notification.
5. Manual reviewer requests for application review.
6. Manual review queue contact agent emails.
5. Batch processing email requests- client fill and signature requests.
6. Client Contact Agent Requests from external client fill/ signature requests.
7. Final email on application submission.
8. Signature declined during external signature request.

Admin Changes

1. Add a group option for 'Enable Use Agent Email' in user preferences.

App Changes

1. Database: UserPreference table – add a new NULLABLE column to store the value for "Use Agent Email". Default to NULL.
2. My Preference:
 - a. Option added for 'Use Agent Email'. If checked, the outgoing emails will be sent from the owning agent's email as set in their preference screen regardless of the user currently logged into the system. If unchecked, the emails will be sent from the current user logged into the system (i.e. agent's assistant) and will use that current user's email as set in the preference screen.

- b. All queries and manager methods related to user preference will need to be changed to incorporate the new fields.

Outbound Email Types

Two broad categories of emails are set out by the system: System generated and Agent initiated emails. The following table lists the emails sent out by the system and the category for each:

Email Template	Category	From Email	To Email
Signature Request Email	Agent	Agent	Client
Review Request Email	Agent	Agent	Reviewer
Request Client Fill Application Email	Agent	Agent	Client
Download Completed Application Email	System	Organization	Client
Reviewer Approved the Application Email	System	Reviewer	Agent
Reviewer Declined the Application Email	System	Reviewer	Agent
Client Signed and Approved the Application	System	Organization	Agent
Client Signed and Declined the Application	System	Organization	Agent
Message Center Notification	System	Organization	Agent
Review Queue Email	System	Organization	Queue Email or Firm Email
Review Request Passcode Email	Agent	Agent	Reviewer
User Share Request Email	Agent	Agent	Share Agent
Accept User Share Email	Agent	Share Agent	Agent
Revoke User Share Email	Agent	Agent	Share Agent

Note: If the alternative email address and name is present, it will be used instead of the agent's.

UI Mock Ups

Admin Tool

Group option to allow 'Use Agent Email' checkbox in user preference view. This would allow the agent to determine if all assistant actions should use the agent's email for outgoing communications.

App Only
Admin Only
Review Queue Only

☐ Disable Copy Apps
☐ Disable View Documents
☐ Disable Save Apps
☐ Disable View Application
☐ Disable View Application Summary
☐ Disable Edit Preferences
☐ Disable Email After Submit
☐ Disable Signing as Client
☐ Disable Signing as Agent
☐ Disable Sign Now
☐ Disable Submit
☐ Disable Signing Until All Pages Viewed
☐ Agent Not Required to View All Pages
☐ Optional Client Email
☐ Allow PassCode Email
☐ Auto-Email PassCode
☐ Enable Quoting

☐ Require Digital Signature
☐ Require Mobile Verification
☐ Disable Editing Other Users' Applications
☐ Enable Use Screen Notification
☐ Enable Test Mode
☐ Enable Override Date
☐ Enable Cc Sender In All Requests
☐ Enable Single User to Sign Multi Signer Types
☐ Require Entry of Application Name
☐ Allow Not In Good Order Submittals
☐ Disable Console For Group
☐ Case Access by Firm ID
☐ Enable Override SSO
☐ Enable User Share
☐ Enable Multi-Life
☐ Enable Use Agent Email

Application Portal

If checked, all emails for any apps owned by this agent will be sent using this email address.

My Preferences

General

Default Jurisdiction Alabama
My Full Name agent

Default Product Type All Product Types
My Email Address tester@email.com

Default Time Zone MST : Mountain Standard Time

Page Size for My App. List 10

Send Message Center Emails ☒
Use Agent Email for All Communication ☒

Reviewers

Add New Reviewer
Reviewer Full Name
Reviewer Email Address

Review Queue Preferences

Default Page Size for Review Queue Lists 3
Warn me before locking reviews No

Save

Areas Impacted

System Area	Yes	Comment
Admin Tool		
▪ Form Library		
▪ Design Forms		
▪ Profile Administration	X	New option for "Enable Use Agent Email". Defaults to "False" (unchecked).
▪ Reports		
▪ Deployment		
FireLight App		
▪ New Application		
▪ Edit Application		
▪ Signature Process		
▪ Review Queue		
▪ Manual Review		
▪ User Preferences	x	New option allowing agent to select 'Use Agent Email'
▪ Inbound Integration		
▪ Outbound Integration		
▪ PDF Generation		
▪ Other	x	Modification on how emails are generated.
FireLight Console		
▪ Windows O/S		
▪ iOS		
▪ Android		
Other Systems		
▪ DTCC Integration		
▪ Commission netting		
▪ Activity Reporting		

Steps for testing:

1. In the Admin tool Groups tab, select the group that will have the option to use the agent email for all communications.
2. In the App Only tab, check the 'Enable Use Agent Email' box.
3. Log into FireLight application portal and go to the My Preferences screen. Check the box for 'Use Agent Email for All Communication'. The fields 'My Full Name' and 'My Email Address' should contain the information that will be used for all communication.
4. Log into FireLight system as a role that has shared case access. Complete tasks, such as requesting client fill, client signatures, review requests, and completion. All outgoing emails, as well as incoming client questions, should contain the email set in the initial 'Use Agent Email' preference view.