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Firm Management - September 2.26

# FIRELIGHT BASE

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**FIRM MANAGEMENT - SEPTEMBER 2.26**

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# iConnect 268110 Design Approach - Firm Management

## – Phase 2 (Sep 2.26)

### Project Overview

This enhancement is building on the changes in the 2.25 release for Firm Management ([iConnect 263186](#)). This phase of the project will further allow Sub Firms (Firm Orgs) to manage their Products. Changes will be made to the Admin and App side that will:

- Extend Sales Agreements such that they can be associated with specific Sub Firms
- Add the ability for Admin users of a Sub Firm to deploy modifications they have made in the Groups (Product activation and state refinement) to higher environments
- Add the ability for an Organization to enable Auto Deploy by default
- Add the ability for Packages to be automatically added to activities based on Role Codes.

### Impacts:

- Product Config -> Sales Agreements
- Utilities -> Deployments: Sub Firm Admins will have access to the Group Configuration Scope for just their Sub Firm
- Organization Configuration -> Organization Settings -> Admin tab: New Setting: Enable Auto Deploy
- Product Config -> Sales Agreements (Auto Deploy)
- Product Config -> Packages

## 1 Firm Management: Sales Agreements

Sales Agreements will be extended so that they can be associated with specified Sub-Firms.

### 1.1 Admin Rights: Firm Association with Sales Agreement

Firm Orgs will be added to the Sales Agreement Page. This will allow the Carriers to deploy the Sales Agreements for the products for the Firm Orgs, and allow the main org to not have to manage the Sales Agreements.

This will be visible to Carriers and main distributor.

Firm Orgs will be added as a hyperlink under the Selling Org. When that link is clicked, it will display a dialog box that contains the Firm Orgs (if any are set up) for the Selling Org that is selected in the Selling Org dropdown.

If the Firm Org is selected, that SA will be tagged for the Firm Org

If the Firm Org is selected, the associated Product will be visible to the Firm Org. If it is not, even though it is deployed to the main Org

If the Org that has logged in is not setup as an Org w/Firm Orgs, the Firm Orgs option will NOT be visible, thus making it so that any changes will NOT affect the current workflow.


When a user is logged in on the App side via a Firm Org, the SA will be checked to determine if it is tagged with that user's Firm Org

When a user is logged in on the App side via an Org that is NOT a Firm Org, the SA will not be checked to determine if it is tagged w/that user's Org, making it so that these changes will NOT affect the current workflow.

The link would ALWAYS be visible to carriers, but would have no effect unless they are selecting a firm that has Sub-Firms/Firm Orgs, and the SA will not be deployed w/visibility until a sub firm is selected

**Sales Agreements**

**Insurance Technologies**



|                       |      |   |
|-----------------------|------|---|
| Account Opening Test1 | True | X |
| Account Opening Test2 | True | X |
| Addendum Signature    | True | X |
| Address Search Wizard | True | X |
| Advantage Term        | True | X |
| Agent Assignment      | True | X |
| AJL Term              | True | X |
| AM Annuity            | True | X |
| Ankit Fee Inquiry     | True | X |
| Ankit Test Product    | True | X |

Sales Agreement of "Insurance Technologies" for product "AA Test Copy from fields Form"

**Selling Org** Insurance Technologies\*

\* By Org Will Indicate an active Sales Agreement

[Firm Orgs](#)

Product Name

More Info

Start  End

Time Zone

Replace Product

Illust Services Role

Last Updated 6/3/2022 11:57 AM UTC

State Approvals

Back Office Script

Options

| State      | Approved |
|------------|----------|
| Alabama    | ✓        |
| Alaska     | ✓        |
| Arizona    | □        |
| Arkansas   | ✓        |
| California | ✓        |

Packages

Custom Lists

**Available Packages**

- Account Opening Test2 Account Opening
- Addendum Signature Application
- Address Search Test Application
- Address Search Wizard Application
- Agent Assignment Agent Assignment
- AJL Term App Application
- AJL Term Illust Illustration
- AM Annuity Application
- Ankit\_Test\_Package Application


**Assigned Packages**

AA Test Copy from fields Form Application

Package Duty

Sales Agreements

**Insurance Technologies**



|                       |      |   |
|-----------------------|------|---|
| Account Opening Test1 | True | X |
| Account Opening Test2 | True | X |
| Addendum Signature    | True | X |
| Address Search Wizard | True | X |
| Advantage Term        | True | X |
| Agent Assignment      | True | X |
| AJL Term              | True | X |
| AM Annuity            | True | X |
| Ankit Fee Inquiry     | True | X |
| Ankit Test Product    | True | X |

Sales Agreement of "Insurance Technologies" for product "AA Test Copy from fields Form"

**Selling Org**

Insurance Tei

\* By Org Will Indicate

[Firm Orgs](#)

Product Name

More Info

Start

Time Zone

Replace Product

Illust Services Role

Last Updated 6/3/2022 11:5

Firm Orgs

Firm Orgs

- ☐ Insurance Technologies
- ☐ Advisor Group
- ☐ Advisors Excel
- ☐ Colorado Avalance
- ☐ Denver Broncos
- ☐ FL Access Brokerage
- ☐ FL Broker Testing
- ☐ HD Vest
- ☐ InsTech Sponsored
- ☐ iSured

Fields Form

red

AJL Term Illust Illustration

AM Annuity Application

Ankit\_Test\_Package Application

**State Approvals**

| State      | Approved |
|------------|----------|
| Alabama    | ✓        |
| Alaska     | ✓        |
| Arizona    | □        |
| Arkansas   | ✓        |
| California | ✓        |

### Acceptance Criteria

- Sales Agreements will be able to be tagged for Firm Orgs
- If a user in a Firm Org, the group Product Access tab will look to see if that Firm Org is checked in the Sales Agreement
- If a user is NOT in a Firm Org, no workflow changes will occur- visibility (all shown)
- When selecting Firm Orgs, the default will be to have none selected
- The Firm Orgs selection will only be saved when the Save button for the Sales Agreement is clicked

## 1.2 App Rights: Firm Association with Sales Agreement

With the addition of the Firm Orgs being associated w/Sales Agreements, the App Side will need to be updated to account for them. If a user logs in with a Firm ID, in addition to checking to see if the Distributor has a Sales Agreement for the product, FireLight will ensure that the user's firm is associated with the Sales Agreement

### ***Acceptance Criteria***

- When checking if a user has access to a product via the Sales Agreement, if the user has a Firm Org Role Code, FireLight will verify that the Firm Org is tagged on the Sales Agreement
- This new check will not interfere with the new State Refinement option on Product Access

## 1.3 Verify - Admin Rights: Error Handling - Sales Agreements

When a "Firm Org" is selected, there must be an active sales agreement for the corresponding "Selling Org". If the user attempts to activate a sales agreement for a "Firm Org" when a sales agreement is not active for the "Selling Org", error text will display at the bottom of the window after clicking "Save". The text will read, "Unable to activate Sales Agreement for a Firm Org without an active Sales Agreement for the Selling Org." When the error message is presented, any values entered by the user will be cleared and not retained.

### ***Acceptance Criteria***

- Error is displayed to the user at the bottom of the page after clicking "Save" when attempting to add a sales agreement for a Firm Org without the sales agreement being active for the Selling Org.
- Values entered by the user are cleared/refreshed when the error message is presented. Nothing is saved and the user must re-enter the values originally selected for the "Firm Org(s)" after properly setting up the sales agreement for the "Selling Org".

## 1.4 Admin: Check Firm Orgs for Active Sales Agreement


When a Firm Org accesses the Product Access tab on the Groups page, the products displayed for selection will be a reflection of the products with an active Sales Agreement only.

Selling Agreement is activated for the Firm Org by selecting the "Firm Orgs" hyperlink:



Sales Agreements

Insurance Technologies



| Product                       | Agreement |   |
|-------------------------------|-----------|---|
| AA Test Copy from fields Form | True      | X |
| AAD Test                      | True      | X |
| Account Opening               | True      | X |
| Account Opening Test1         | True      | X |
| Account Opening Test2         | True      | X |
| Addendum Signature            | True      | X |
| Address Search Wizard         | True      | X |
| Advantage Terms               | True      | X |
| Agent Assignment              | True      | X |

Sales Agreement of "Insurance Technologies" for product "AA Test Copy from fields Form"

**Selling Org** Insurance Technologies\*  
\* Bu Org Will Indicate an active Sales Agreement  
Firm Orgs

Product Name

More Info

Start  End

Time Zone

Replace Product

Illust Services Role

Last Updated 6/3/2022 11:57 AM UTC

**State Approvals**

| State      | Approved                            |
|------------|-------------------------------------|
| Alabama    | <input checked="" type="checkbox"/> |
| Alaska     | <input checked="" type="checkbox"/> |
| Arizona    | <input type="checkbox"/>            |
| Arkansas   | <input checked="" type="checkbox"/> |
| California | <input checked="" type="checkbox"/> |

☐ Check/Uncheck All

☐ Display Approved States during signing ceremony

**Packages** Custom Lists

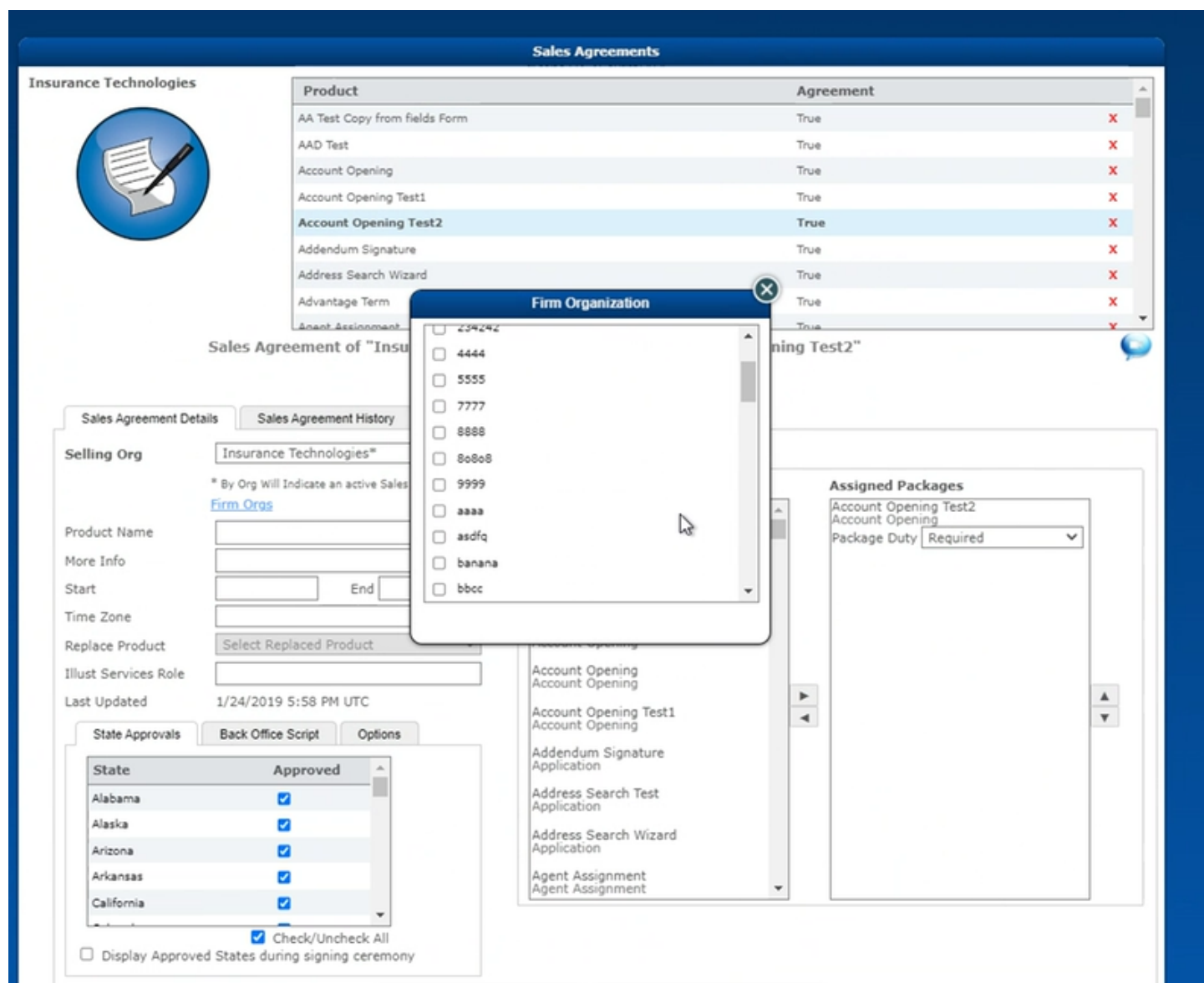
**Available Packages**

- AA\_EX Application
- AAD Pack Application
- Account Opening Account Opening
- Account Opening Account Opening
- Account Opening Test1 Account Opening
- Account Opening Test2 Account Opening
- Addendum Signature Application
- Address Search Test Application
- Address Search Wizard Application
- Agent Assignment
- Agent Assignment

**Assigned Packages**

- AA Test Copy from fields Form Application
- Package Duty

Firm Org is selected:



**Sales Agreements**

| Product                       | Agreement |   |
|-------------------------------|-----------|---|
| AA Test Copy from fields Form | True      | X |
| AAD Test                      | True      | X |
| Account Opening               | True      | X |
| Account Opening Test1         | True      | X |
| Account Opening Test2         | True      | X |
| Addendum Signature            | True      | X |
| Address Search Wizard         | True      | X |
| Advantage Term                | True      | X |
| Agent Assignment              | True      | X |


**Firm Organization**


- ☐ 254242
- ☐ 4444
- ☐ 5555
- ☐ 7777
- ☐ 8888
- ☐ 80808
- ☐ 9999
- ☐ aaaa
- ☐ asdfq
- ☐ banana
- ☐ bbcc

**Assigned Packages**

Account Opening Test2  
Account Opening  
Package Duty: Required

The list of available products is displayed on the Product Access tab based on an active selling agreement for the firm org:

**Groups**  
 [Create New](#)



| Name ▼                    | Firm Org       | TC Role Code  |   |
|---------------------------|----------------|---------------|---|
| FL Broker Dealer Admin    | Firm A (12345) | FLBD_Admin    | X |
| FL Broker Dealer Agent    | Firm A (12345) | FLBD_Agent    | X |
| FL Broker Dealer Reviewer | Firm A (12345) | FLBD_Reviewer | X |

Last Updated On : 3/11/2022 3:59 PM UTC

Name:  Illustration Services Role Code:  TC Role Codes:

Firm Org:

App Admin Review Queue Activity Access Product Access Case Access Needs Filter Debugging Tools Group History

Organization:  ☐ Check / Uncheck All ☐ Enable State Refinement

☒ Accumulation Freedom  
☐ Annuity 222  
☒ Annuity Freedom  
☐ Aura Next UL  
☒ Classic Term  
☐ eDelivery Deliver Only  
☒ EITS Wizard Product  
☒ Fee and Expense Inquiry  
☒ Forms  
☒ Generic Subpay  
☐ Index Select  
☒ iSured Term  
☐ Life App Paramed Testing  
☐ Life Milliman Term Demo

☒ Accumulation Product  
☒ Annuity 333  
☒ Annuity Rates DRAFT  
☒ BL Test Product  
☒ Death Benefit Product  
☒ eDelivery Fill and Sign  
☒ Elite Term  
☒ Financial Protection  
☐ Future Accumulation  
☒ Income Choice  
☐ iSured Demo Hide  
☒ Kevin Test Product  
☒ Life e-Ticket Wizard  
☐ Life Milliman Term Demo

☐ Addendum Product  
☐ Annuity Care Plus  
☐ Annuity Ticket  
☐ BlueSky Life  
☒ Demo Wizard Product  
☐ eDelivery Sign Only  
☒ Essential Term  
☒ FL Test Training Product  
☒ Future Advantage  
☐ Income Provider Plus  
☒ iSured Lifetime Income  
☐ L&A  
☐ Life IUL Template  
☐ Life Term Template

### Acceptance Criteria

- Products listed on the Groups, Product Access page are limited to products only with an active sales agreement for the firm org.


## 2 Firm Management: Defaults


### 2.1 Admin Rights: Groups Defaults

- Disable View Organization
- Disable View Product
- Disable View Product Repository
- Disable View Sales Agreement

When the Group is created, these will be the default values. However, if the admin user changes the values, those new values will be saved. If the admin user is a Firm Org admin, they will not be able to change the values, either at the time of creation of the group, or in subsequent visits.

\*Note: When the Firm Org drop down is changed from a Firm Org to blank, the default options listed above will be unchecked. If the group should have those options checked (disabled), and the Firm was changed to blank in this case, the options will need to be re-checked and saved.

**Groups**  
 **Create New**



| Name ▼                    | Firm Org       | TC Role Code  |   |
|---------------------------|----------------|---------------|---|
| FL Broker Dealer Admin    | Firm A (12345) | FLBD_Admin    | X |
| FL Broker Dealer Agent    | Firm A (12345) | FLBD_Agent    | X |
| FL Broker Dealer Reviewer | Firm A (12345) | FLBD_Reviewer | X |

Last Updated On : 3/11/2022 3:59 PM UTC

Name 
Illustration Services Role Code 
TC Role Codes

Firm Org

App
Admin
Review Queue
Activity Access
Product Access
Case Access
Needs Filter
Debugging Tools
Group History

☐ Disable View Library  
☐ Disable View Deploy  
☐ Disable View Packages  
☒ Disable View Product Repository  
☐ Disable View Email Templates  
☐ Disable View Back Office Script  
☐ Disable View Quoting  
☐ Disable View Rule Sets  
☐ Enable Read Only User Admin Access

☐ Disable View Groups  
☐ Disable View Reports  
☐ Disable View Activity  
☐ Disable View Commission  
☐ Disable View Review Queue  
☒ Disable View Organization  
☐ Enable Change UI Branding  
☐ Disable View Custom Lists  
☐ Enable Common Tags Utility

☐ Disable View Designer  
☐ Disable View Maps  
☒ Disable View Sales Agreement  
☐ Disable Unlock Forms and Rule Sets  
☐ Disable View Group Admin Permissions  
☒ Disable View Product  
☐ Enable View Fees  
☐ Enable View Utilities  
☐ Enable Firm Management

Save

### Acceptance Criteria

- The following options will be selected by default on the Admin tab of the Groups page when an admin creates a Group for a firm. These will be the initial values, with any changes the admin makes being saved.

- Disable View Organization
- Disable View Product
- Disable View Product Repository
- Disable View Sales Agreement
- If the admin user is a Firm Org admin, they will not be able to change the values of these selections.
- Note: When the Firm Org drop down is changed from a Firm Org to blank, the default options listed above will be unchecked. If the group should have those options checked (disabled), and the Firm was changed to blank in this case, the options will need to be re-checked and saved.

## 3 Firm Management: Deployments

### 3.1 Admin Rights: Deployments

When an admin user for a Firm Org is logged in, they will have access to Deployments. However, that access will be greatly restricted. Admin users of the Firm Orgs will have the Synchronization Scope default to "Group Configuration", and that will be the only item available to them in the dropdown list.

The list of Groups that they will see will only be Groups that are associated with their Org.

Deploy - FL Access Carrier

Synchronization Scope: Group Configuration
Reason:

Deployment
History

Organization: FL Access Carrier
Load Deployment Information

Select a Synchronization Scope, optionally choose an Organization and/or check Force Deploy, then click **Load Deployment Information** to load the list of deployable items.

☒ Force Deploy

Total for Selected Items

No data available

### Acceptance Criteria

- When an admin user for a Firm Org is logged in, they will have access to Deployments. That access however will be limited.
- The Synchronization Scope will be defaulted to "Group Configuration"
- There will be no other scopes in the dropdown list
- The list of Groups that they see will only be Groups that are associated w/their Firm Org.

## 3.2 Admin: Org Auto Deploy Setting


The Organization settings in Admin will be updated to include the ability for a Distributor to elect to always have Carrier deployments into their environments Auto Deploy to their (Distributor's) Staging and Production environments.

This will be accomplished by a checkbox on the Admin tab of the Organization Settings (under Organization Configuration).

This new setting will only be available to Distributors.

When this option is checked, it will cause Auto Deploy to be enabled by default for all new Carriers.

Organization - FL Access



## FL Access

[Mobile Configuration](#) [Maintain Devices\\*](#)

Last Updated: 5/10/2022 3:35 PM UTC  
NOTE: Items marked with \* are not included in deployments for Organization Sync Scope

Organization
Security
Activity
Signature
Admin

Default Validation Placement Top

Google Analytics Tracker ID\* UA-110394100-1

Policy Block Settings\* [Click to Edit](#)

Third Party Service Config\* [Click to Edit](#)

External Vendor Permission\* [Click to Edit](#)

Enable Auto Mapping ☒

Enable Force Deploy ☐

Enable Auto Deploy ☐

Validate Rule Name Uniqueness ☐

Enable InsTech Managed Products ☒

Allow Outside Repository Management ☐

Save Organization

### Please Note:

If the option is set, either the Organization scope will need to be deployed to the higher environments, or the setting will need to be updated directly in the higher environments for it to take effect.

While the setting will have Auto Deploy turned on for all new Carriers, the Distributor will be able to go in and deselect Auto Deploy for individual Carriers.

### **Acceptance Criteria**

- A new Organization Setting will be added to the Admin tab for Distributors, called "Enable Auto Deploy"
- When this setting is enabled, Auto Deploy will be turned on for all new carriers by default
- Distributors will still be able to disable Auto Deploy for individual Carriers if this new option is enabled, as it will just set the default for Auto Deploy to be enabled.

## 4 Firm Management: Packages

### 4.1 Admin: Auto Added Packages

FireLight will now allow for packages to be automatically added to Activities based on Role Codes. This will allow for these packages to be added to the Activity for users with the specified Role Code without it being included in a Sales Agreement.

Add a new free form text box on the right next to the "Role Codes" text box. It will feature the text "Auto Add to These Role Codes" in the upper left-hand corner and a "Firm Orgs" hyperlink on the top right.

When the new "Auto Add to These Role Codes" box on the right is used, the "Role Codes" box will be ignored.

The textbox will support the use of the wildcard "\*". The wildcard will allow users to specify:

- Everything: \*
- Begins With ex: "ABC\_\*" Would match all Role Codes that start with "ABC\_"
- Ends With ex: "\*Agt" Would match all Role Codes that end with "Agt"
- Contains ex: "\*Asst\*" Would match all Role Codes that contain "Asst"

When matching for Begins With, Ends With, and Contains, the text comparison will NOT be case sensitive.

There will be a link to the Firm Orgs Selection on top of the box.

Firm Orgs link will display a dialog box of Firm Orgs to be selected.

If the text box for the Auto Add Role Codes is populated, and there is a wildcard entry for a Firm Org, that Firm Org will be selected when the dialog box is displayed. \*\*Note that the wildcard must be the exact wildcard for the Firm Org for this to occur. For example, "ABC\_\*" would cause Firm Org ABC to be selected, but "AB\*" would not.

When a user selects from the list in the Firm Orgs link, the text in the Auto Add Role Codes box (if any exists) will be replaced with the wildcard entries for the selected Org(s) will be placed in the box.

If a Firm Org is selected, the wildcard for all of that Firm Orgs Role Codes will be added to the new Auto Add Role Codes textbox (i.e. "ABC\_\*")


The selections made in the "Firm Orgs" list will be saved when "Save Package" is selected on the main "Packages" screen. If the user navigates between packages and does not save after each "Firm Orgs" list selection, the changes will be lost.





There will be a dropdown list box that will determine the package position. The options will be:

- Blank (default)
- Before Sales Agreement
- After Sales Agreement

If an Activity is locked, the packages will not be automatically added (or removed).






**Add New Package**



**Packages - FL Access Carrier**

| Package                   |                             |   |
|---------------------------|-----------------------------|---|
| Account Opening           | <a href="#">[Duplicate]</a> | X |
| Addendum Package          | <a href="#">[Duplicate]</a> | X |
| <b>AM Annuity Package</b> | <a href="#">[Duplicate]</a> | X |
| AM Life Package           | <a href="#">[Duplicate]</a> | X |
| AM Sage Ticket Pkg        | <a href="#">[Duplicate]</a> | X |
| AM Tele-Sign Demo         | <a href="#">[Duplicate]</a> | X |
| Annuity Forms Only        | <a href="#">[Duplicate]</a> | X |
| Annuity Pkg - Wizard Only | <a href="#">[Duplicate]</a> | X |
| Annuity Rate DRAFT        | <a href="#">[Duplicate]</a> | X |


[Replace Form/Wizard/Rule Set in Package](#)


Package Detail

Forms/Wizards In Package

Rule Sets In Package


Package History

**Package Name**

**ACORD Type**

**Area Type**

**Role Codes**




**Forms/Wizards in Package** 3


**Rule Sets in Package** 2

**Last Updated** 9/3/2021 6:08 PM UTC


**Auto Add to These Role Codes**


[Firm Orgs](#)


**Package Position:**




**Packages - FL Access Carrier**

 **Add New Package**



| Package                   | [Duplicate] | X |
|---------------------------|-------------|---|
| Account Opening           | [Duplicate] | X |
| Addendum Package          | [Duplicate] | X |
| <b>AM Annuity Package</b> | [Duplicate] | X |
| AM Life Package           | [Duplicate] | X |
| AM Sage Ticket Pkg        | [Duplicate] | X |
| AM Tele-Sign Demo         | [Duplicate] | X |
| Annuity Forms Only        | [Duplicate] | X |
| Annuity Pkg - Wizard Only | [Duplicate] | X |
| Annuity Pkg - DRAFT       | [Duplicate] | X |

 [Replace Form/Wizard/Rule Set in Package](#)

Package Detail

Forms/Wizards In Package

Rule Sets In Package

Package History

**Package Name**

**ACORD Type**

**Area Type**

**Role Codes**  

Add Standard  
Api Role

Forms/Wizards in Package

Rule Sets in Package

Last Updated

3


2

9/3/2021 6:08 PM UTC

**Auto Add to These Role Codes**

**Package Position:**

Firm Orgs

 New help icon

Save Package

The admin user will need to deploy the packages via the Package Configuration Scope if it is to be auto added for Role Codes since the package may NOT be associated with a Product / Sales Agreement

Free form text box like the Role Codes box to the left. Can handle multiple Role Codes, as well as wildcards (\*).

Default to blank. Other options would be: "Before Sales Agreement" and "After Sales Agreement"

**Packages - FL Access Carrier**

Add New Package

| Package                   |                             |   |
|---------------------------|-----------------------------|---|
| Account Opening           | <a href="#">[Duplicate]</a> | X |
| Addendum Package          | <a href="#">[Duplicate]</a> | X |
| <b>AM Annuity Package</b> | <a href="#">[Duplicate]</a> | X |
| AM Life Package           | <a href="#">[Duplicate]</a> | X |
| AM Sage Ticket Pkg        | <a href="#">[Duplicate]</a> | X |
| AM Tele-Sign Demo         | <a href="#">[Duplicate]</a> | X |
| Annuity Forms Only        | <a href="#">[Duplicate]</a> | X |
| Annuity Pkg - Wizard Only | <a href="#">[Duplicate]</a> | X |
| Annuity Pkg - DRAFT       | <a href="#">[Duplicate]</a> | X |

Replace Form/Wizard/Rule Set in Package

Package Detail

Forms/Wizards In Package

Rule Sets In Package

Package History

**Package Name**

ACORD Type

Area Type

**Role Codes**

Add Standard  
Api Role

AM Annu  
Applicati  
Activity

Forms/Wizards in Package    3

Rule Sets in Package        2

Last Updated                 9/3/2021 6:08 PM UTC

Save Package

X

Firm Orgs

Firm Orgs

☐ Insurance Technologies  
☐ Advisor Group  
☐ Advisors Excel  
☐ Colorado Avalance  
☐ Denver Broncos  
☐ FL Access Brokerage  
☐ FL Broker Testing  
☐ HD Vest  
☐ InsTech Sponsored  
☐ iSured

If a Firm Org is selected here, it will have the effect of automatically populating the Auto Add Role Codes box with all of the Role Codes for that Firm Org.

### Acceptance Criteria

A new textbox will be added to the Packages screen in Admin.

- Above it on the left-hand corner will be the text "Auto Add to These Role Codes"
- Above it on the right-hand corner will be a hyperlink for "Firm Orgs".
- If a user clicks on the hyperlink, a dialog box will appear for the user to select the Firm Org(s) that will be used to populate the text box
- When a user selects a Firm Org and closes the window, the contents of the text box will be updated to include the wildcard entries for the selected Firm Org(s). Example: Selecting Firm Org ABC would result in "ABC\_\*" being entered into the text box.

- If there are entries in the text box and a user clicks on the "Firm Orgs" link, if there is a wild card for a Firm Org in the box (exact match - i.e. "ABC\_\*" would match for ABC Firm Org, but "AB\*" would not), that will cause that Firm Org to be selected in the Firm Orgs dialog box.
- There will be a dropdown box under the new Auto Add Role Codes textbox. It will be labeled: Package Position. It will contain the entries 1) Blank (default) 2) Before Sales Agreement and 3) After Sales Agreement
- The items in the new Auto Add textbox will only be saved upon clicking the Save button for the Package, regardless of if they used the "Firm Orgs" link to populate or not
- Auto add will be available for all ACORD types with the exception of:
  - E-Delivery (121-12100)
  - E-Delivery Deliver Only (121-12123)
  - E-Delivery Sign Only (121-12122)
  - Illustration (111)
  - Quote (212)
- Auto add will be limited to the "Area Type" of "Activity" only; "Reviewer" and "Reviewer Optional" will not be included in this scope.

## 4.2 Admin: Auto Added Packages and Package Position Audits

Audits are made and visible in the Package History tab when changes are made to:

- Auto Add Role Codes
- Package position dropdown list

The text for the Action will be:

- {Package Name} auto add package role code changed. Old value: {Old value}  
New Value: {New Value} {Action Date} {Login}
- {Package Name} saved and updated {Action Date} {Login}

The old value will be the previous value, New Value will be the value after the update, the Action Date will be the date and time the update occurred, and the Login will be the user that made the update.

Example: {Package Name} auto add package role code changed. Old value: New Value: ABC\*DEF\*



|                           |                             |   |
|---------------------------|-----------------------------|---|
| AM Annuity Package        | <a href="#">[Duplicate]</a> | X |
| AM Life Package           | <a href="#">[Duplicate]</a> | X |
| AM Sage Ticket Pkg        | <a href="#">[Duplicate]</a> | X |
| AM Tele-Sign Demo         | <a href="#">[Duplicate]</a> | X |
| Annuity Forms Only        | <a href="#">[Duplicate]</a> | X |
| Annuity Pkg - Wizard Only | <a href="#">[Duplicate]</a> | X |
| Annuity Pkg - DRAFT       | <a href="#">[Duplicate]</a> | X |

 [Replace Form/Wizard/Rule Set in Package](#)

Package Detail Forms/Wizards In Package Rule Sets In Package Package History

| Action   | Old Value              | New Value             | Action Date        | Login           |
|--|------------------------|-----------------------|--------------------|-----------------|
| Account Opening package position was saved and updated | Before Sales Agreement | After Sales Agreement | 6/29/2022 12:08 PM | it              |
| Account Opening saved and updated                      |                        |                       | 6/29/2022 12:08 PM | it              |
| Account Opening auto add package role code changed     |                        | ABC_*                 | 6/29/2022 12:08 PM | it              |
| Account Opening saved and updated                      |                        |                       | 6/29/2022 12:08 PM | it              |
| Account Opening rule set added                         |                        |                       | 9/3/2021 12:07 PM  | Brandon_FLADEMO |
| Account Opening saved and updated                      |                        |                       | 9/3/2021 12:07 PM  | Brandon_FLADEMO |
| iSured eApp Wizard rule set removed                    |                        |                       | 9/3/2021 12:06 PM  | Brandon_FLADEMO |
| Account Opening saved and updated                      |                        |                       | 9/3/2021 12:06 PM  | Brandon_FLADEMO |
| Account Opening rule set removed                       |                        |                       | 9/3/2021 12:06 PM  | Brandon_FLADEMO |
| Sage Term Ticket rule set added                        |                        |                       | 9/3/2021 12:05 PM  | Brandon_FLADEMO |
| Account Opening saved and updated                      |                        |                       | 9/3/2021 12:05 PM  | Brandon_FLADEMO |

### Acceptance Criteria

- When the new fields for Package Position and Automatically Added Role Codes are updated, an audit will be created and displayed in the Package History tab.
- The text for Action in the Audits will be
  - package position was saved and updated
  - auto add package role code changed
- The other values (Old Value, New Value, Action Date, and Login) will follow normal audit conventions

## 4.3 Admin: Help information for Auto Added Packages

A new Help bubble will be placed next to the Firm Orgs link. When a user hovers over it, it will display the following help text:

In the Auto Add to These Role Codes box you can type in individual Role Codes or use wildcards to specify multiple Role Codes. Using the wildcards will allow you to specify:

To populate this box with the Role Codes for specific Firm Org(s), you can click on the Firm Orgs link and select the desired Org(s). Once you close that box, anything in the Auto Add to These Role Codes box will be updated with the wildcard entries for the selected Firm Org(s).

### Acceptance Criteria

- A new help bubble will be added for the Auto Add to These Role Codes box.
- The help text will be:  
In the Auto Add to These Role Codes box you can type in individual Role Codes, or use wildcards to specify multiple Role Codes. Using the wildcards will allow you to specify:

Everything: \*  
Begins with: Something\*  
Ends with: \*Something  
Contains: \*Something\*

To populate this box with the Role Codes for specific Firm Org(s), you can click on the Firm Orgs link and select the desired Org(s). Once you close that box, the Auto Add to These Role Codes box will be updated with the wildcard entries for the selected Firm Org(s).

#### **4.4 App: Auto Added Packages**

FireLight will now allow for packages to be automatically added to Activities based on Role Codes. This will allow for these packages to be added to the Activity for users with the specified Role Code without it being included in a Sales Agreement.

When a user creates a new Activity, FireLight will check to see if that user's Role Code matches any entries in the new Auto Add Role Codes (including the wild cards) for that Activity type.

If it does, it will add the package to the Activity in the position indicated by the new Package Position entry on the Package

If no match is found, no Package will be automatically added

This check will only occur at Activity creation. If a Role Code is added or removed after an Activity is created, it will not affect the packages attached to that activity

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

- When a new Activity is created, a check will be made to determine if the user's Role Code(s) is listed in the new Auto Add Role Codes box for the Activity type
- If a match is found, that package will automatically be added at the position indicated by the new Package Position entry on the Package
- If no match is found, nothing will change
- The check and any addition of packages will only occur at the time of the Activity creation. Should the values in the Auto Add Role Codes change after the Activity is created, it will not affect the Activity
- Any forms in the package that is auto added are included in the forms dialog in the application entry.

- Signing Ceremony Only forms are not displayed (these forms are not displayed today, so regression)
- Auto add will be available for all activity types, except for:
  - E-Delivery (121-12100)
  - E-Delivery Deliver Only (121-12123)
  - E-Delivery Sign Only (121-12122)
  - Illustration (111)
  - Quote (212)
- If the session user has multiple role codes associated with them, the first role code from the session user's role code list will be used.