



# iConnect 165897 Design Approach - Disable Send Email Request

### **Project Overview**

Add functionality to disable the Send Email Request on the Client Signature Choice screen. Current functionality requires the user to sign now or send an email request. This enhancement would allow the user to go directly to the Client Verification screen and skip the Client Signature Choice screen.

# **Features/Requirements**

- Group Option--- 'Disable Send Email Request' added to allow the option to be enabled by group role code.
- Allow user to jump directly to the Client Verification Screen.

## **Use Cases / Workflow Changes**

After selecting the appropriate signer(s), the user will be directed to the Client Verification
Page.

## **Admin Changes**

User will need to check the 'Disable Send Email Request' option in the group settings for the desired user. You will not be able to use options 'Disable Sign Now' and 'Disable Send Email Request' together. There is validation in place to ensure that these options are not both checked.

#### **App Changes**

If the option 'Disable Send Email Request' is checked in the group settings for the user, there will not be a Client Signature Choice screen and the user will be directed to the Client Verification page once they select a Signer.

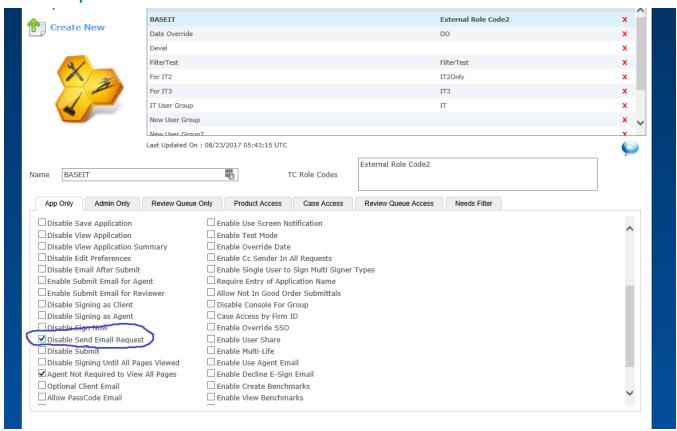
## **Integration Changes**

None Needed





## **UI Mock Ups**



#### **How to Enable and Use This Feature**

- In the Admin tool group options tab, select the checkbox for 'Disable Send Email Request'.
- In the App portal, create a new application and complete the app to 100%.
- Click 'Continue' and this will take you to a list of Signers.
- Select the appropriate Signer(s) and you will be directed to the Client Verification page.

# **Areas Impacted**

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration	Yes	'Disable Send Email Request' option added to group options. Cannot have 'Disable Sign Now' and 'Disable Send Email Request' together.
- Reports		





- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process	Yes	User will skip the client choice screen and jump directly to Client Verification if the 'Disable Send Email Request' option is checked
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		