
Agent Signing Order

FIRELIGHT BASE



AGENT SIGNING ORDER
Document Version: 1.1
Published: January 14, 2022

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iConnect 253979 Design Approach - Agent Signing Order

Project Overview

In this Enhancement, we will want to move the already existing Agent Signing Order to the Groups Tab instead of having it on the Organizational Settings in the Admin Tool. This enhancement will allow businesses to utilize the signing order in a more in-depth way, as it will allow different signing orders for different role codes.

Impacts -

Groups Tab - Agent Signing Order will be added to the App tab under Signing: General. This checkbox and signing order setting will be enabled for all role codes, so no changes should occur for any clients that have this setting already enabled within the organization setting

1 Move the Agent Signing Order to the Groups Tab

We will want to move the already existing Agent Signing Order from the Organization settings tab to the Groups Tab under the App tab. This will need to be moved under the subtitle "Signing: General" and will be enabled or disabled by a checkbox. When the checkbox is clicked, the dropdown next to the checkbox will be enabled, and the user can choose which order the agent will sign (already existing functionality). If the checkbox is not checked, the agent sign will be set to default

Signing: General

- ☒ Agent Not Required to View All Pages
- ☒ Allow Edits to Mobile
- ☐ Disable Decline E-Sign
- ☐ Disable Signing as Agent
- ☐ Disable Signing as Client
- ☐ Disable Signing Until All Pages Viewed
- ☐ Disable Sign Now
- ☒ Enable Single User to Sign Multi Signer Types
- ☐ Enable Override SSO
- ☒ Require Signature Capture
- ☐ Disable Send Email Request
- ☐ Agent Signing Order Last ▼

When Last is chosen by Agent Signing Order, another statement will show: Notify Agent when ready to sign which has the option of being checked.

Signing: General

- ☒ Agent Not Required to View All Pages
- ☒ Allow Edits to Mobile
- ☐ Disable Decline E-Sign
- ☐ Disable Signing as Agent
- ☐ Disable Signing as Client
- ☐ Disable Signing Until All Pages Viewed
- ☐ Disable Sign Now
- ☒ Enable Single User to Sign Multi Signer Types
- ☐ Enable Override SSO
- ☒ Require Signature Capture
- ☐ Disable Send Email Request
- ☐ Agent Signing Order Last ▼
- ☐ Notify Agent When Ready to Sign

Acceptance Criteria

- Agent Signing Order will be listed under the "Signing: General" subtitle in the Apps Tab of the Groups Tab in the Admin Tool
- When the Agent Sign Order is clicked, the dropdown will enable, allowing the user to choose the signing order of the agent.
- When the Agent Signing Order is unchecked, the dropdown will be disabled
- The Agent Signing order functionality already exists, and any change to this functionality is out of scope for this project
- WCAG guidelines still apply
- This change will be applied for REACT (Embedded Esign) as well as Legacy