INSURANCE TECHNOLOGIES

Modified Email Templates with Product Specific Links

FIRELIGHT BASE

FireLight®

Platform

Insurance Technologies, LLC

Insurance Technologies, LLC
Two South Cascade Avenue
Colorado Springs, CO 80903
USA
Phone: 719.442.6400
FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com
Website: http://www.insurancetechnologies.com

Table of Contents

Page 3 of 10

iConnect 242108 Design Approach - Modified Email Templates with Product Specific Links

Project Overview

Clients have requested the ability to add product specific links to emails. The specific use case is for the ability to include the links to retrieve the Prospectus or Buyer's Guide for the application that is being submitted. FireLight Admin, Products will be enhanced with a new drop-down field to select the option for Prospectus or Buyer's Guide and enter a product Prospectus or Buyer's Guide URL Link. Once this link is added, a new email replacement variable can be used in Email templates to display the Product Prospectus or Buyer's Guide URL.

Impacts:
- A new drop-down will be added to the Products page to select Prospectus and then add a product prospectus URL.
- A new email replacement variable will be added for the Product Prospectus or Buyer's Guide URL based on the product selected by the customer. This can then be used in email templates to show a Product Prospectus or Buyer's Guide URL based on the product selected by the customer.
- Data item added for use to differentiate product document type via rules to populate correct document reference into Leave Behind Email and/or Download Completed Application template.

1   Create "Product Links" on Product Page in Admin

On the Products page in Admin, an option will be added to enter product URL links for "Prospectus" or "Buyer's Guide". A dropdown to select Link Name (i.e.: Prospectus) and a text box to enter the Link (URL) will be added.

A new Data Item "FLI_PRODUCT_LINK_NAME" will be added for rule use to identify the document name desired in the email template (Prospectus or Buyer's Guide). This will allow email templates (such as the Leave Behind Email) to feature the document name desired by product type or product name.

A new Data Item to access the URL for Prospectus or Buyer's Guide will be added to the system as "FLI_PRODUCT_LINK". The prospectus or buyer's guide URL entered will be used for the product when this data item is used on forms, wizards or in email templates.

1. Link dropdown will have below values.

- Blank (By default drop down should be left blank)
- Prospectus
- Buyer's Guide

2. After user selects "Prospectus" from the drop down and enters a URL in the value text box, it will be saved into the database when the button "Save Product Config" is clicked.

3. To remove a product link, user can select blank value from the drop down and remove the link from the text box. In case user only selects a blank from the drop down and saves the product, system will delete the product link for that product.

4. If the user selects "Prospectus" or "Buyer's Guide" from the drop down and clicks "Save Product Config" without entering the URL, an error message will display prompting the user to enter the URL, "Please enter URL value.".

5. If the user enters the URL value and clicks "Save Product Config" without selecting a link name, an error message will display prompting the user to select the link name from dropdown, "Please select link name.".

6. Internally when Prospectus or Buyer's Guide value for the selected product is saved, new Data Item "FLI_PRODUCT_LINK" will be linked to this Prospectus or Buyer's Guide value.

7. The actions of adding, editing, or deleting a product link will be recorded in Product History. Action text for all the cases will be as below.
   - Adding a product link - "<Link Type> added"
   - Editing a product link - "<Link Type> updated"
   - Removing product link - "<Link Type> removed"

Enhancement to the Products page:

Insurance Technologies

FireLight®

Product Details	Product History

Product Name	_TD Test Product	
Product Type	Annuity	
Product Category	Annuity	
Product Type Filter (UI)	Annuity	
Rank Order		
CUSIP ID		
Billing Code	Normal	
Product Code		
Carrier Code		
Product DTCC Member Id		
Product Organization Name		
Full Settling DTCC Member	☐	
Product Locale	English (en-US)	
Allow Product Notification	☐	
Message		
	Start ___ End ___	
Product Links		
Last Updated	1 PM UTC	
Product Features		

Product Links dropdown:
- **Prospectus**
- Buyer's Guide

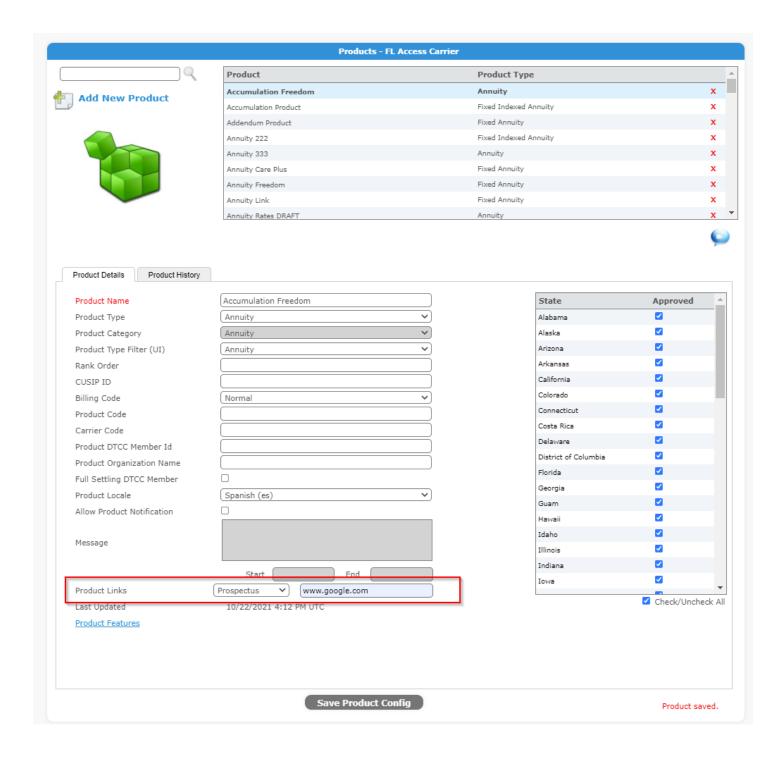| State	Approved
Alabama	☑
Alaska	☑
Arizona	☑
Arkansas	☑
California	☑
Colorado	☑
Connecticut	☑
Costa Rica	☑
Delaware	☑
District of Columbia	☑
Florida	☑
Georgia	☑
Guam	☑
Hawaii	☑
Idaho	☑
Illinois	☑
Indiana	☑
Iowa	☑

☑ Check/Uncheck All

For future use, this new section will also facilitate adding other product specific links, such as Video link, Brochure link, Leave Behind Form, etc.

Sample Rule to assign Document Type and Product Link values into the Data Items Ids based on the product type chosen in the application:

```
<block>

<diset dataitemid="FLI_PRODUCT_LINK_NAME">

 <const value="Buyer's Guide" type="String" />

</diset>

 <diset dataitemid="FLI_PRODUCT_LINK">

 <const value="www.Yahoo.com" type="String" />

</diset>

</block>
```

Acceptance Criteria

- "Product Links" section is available on the Admin Product Page.
- Dropdown shows option to select "Prospectus" or "Buyer's Guide".
- Dropdown default is a blank value.
- Text box is available to enter a value for the link.
- Error message is displayed if user selects "Prospectus" or "Buyer's Guide" from dropdown and does not enter a link name prior to selecting "Save Product Config".
- Error message is displayed if user enters a link name but does not select "Prospectus" or "Buyer's Guide" from the dropdown prior to selecting "Save Product Config".
- Editing a product link is allowed by selecting a different value from the drop down, or by changing the link into the text box.
- When a Prospectus link is entered for a product, it restricts adding a second Prospectus link or Buyer's Guide link.
- When a Buyer's Guide link is entered for a product, it restricts adding a second Buyer's Guide link or Prospectus link.
- If user has entered Prospectus URL for products, Data Item "FLI_PRODUCT_LINK" shows correct value when set in rules or application fields.
- If user has entered Buyer's Guide URL for products, Data Item "FLI_PRODUCT_LINK" shows correct value when set in rules or application fields.
- User is not able to enter both a Prospectus and Buyer's Guide link for the same product.

- Leave-Behind email shows the Prospectus or Buyer's Guide URL for the Product used in the Application.
- Data Item ID <FLI_PRODUCT_LINK_NAME> is created for use in rules.
- Data Item ID <FLI_PRODUCT_LINK_NAME> provides the name of the document as assigned in rules that can vary by product type or product name (as set in rules).
- When blank value is selected in the Product Link drop down, product link gets removed for that product.

2 Add replacement variable for the Product Prospectus

A new replacement variable "PRODUCT_LINK" will be created for Product Prospectus or Buyer's Guide. When using this replacement variable in an email template, while parsing the email, it will be replaced by the Product Prospectus or Buyer's Guide value entered on the Product Info screen for the specific product the email is sent for.

Example: When email replacement variable <PRODUCT_LINK> is used in below leave-behind email template, it will be replaced by variable value for Prospectus or Buyer's Guide entered on Product page for that specific product.

A new replacement variable <PRODUCT_LINK_NAME> will be added for rule use to identify the document name desired in the email template. This will allow the Leave Behind Email template to feature the document name desired by product type or product name.

Example: Template could feature reference to "Prospectus" if product is Variable Annuity, reference to "Buyer's Guide" if product is Fixed Annuity - The terminology reflected in the email template will come from rules set by client.

The application search item <PRODUCT_LINK_NAME> can be added by request to any client organization.

Leave-Behind email template: -

Dear <CLIENT_NAME>,

Thank you for signing the <ACTIVITY_NAME> for '<PRODUCT_NAME>' of <COMPANY_NAME>. Click link **<PRODUCT_LINK>** to download **<PRODUCT_LINK_NAME>**.

To download or print the signed documents, please click on the link at the bottom of the email. You will be asked for your birth date and the last 4 digits of your SSN to login.

If you have questions, please feel free to contact me.

Sincerely,

<AGENT_NAME>

To download or print signed <ACTIVITY_NAME> documents, click on <URL_LINK> and enter the last 4 digits of your SSN and your birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of a new browser window.

Acceptance Criteria

- New replacement variable <PRODUCT_LINK> is available to be added to email template to allow sending Product Prospectus URL.
- When email is received, product prospectus URL in the email matches the URL added on the Product page, for the specific product.
- New replacement variable <PRODUCT_LINK_NAME> is created for use in rules.
- Replacement variable <PRODUCT_LINK_NAME> provides the name of the document as assigned in rules that can vary by product type or product name (as set in rules).