



# iConnect 118204- Quoting Design Approach

Create a way to compare premiums from different term products.

### **Workflow Changes**

New views will be added in the Admin tool and the Application portal to accommodate the quoting functionality. Provider changes will be necessary to accommodate the various ways to retrieve rates. New deployment views will have to be added and existing product deployments will need to be updated. Various database updates are necessary to associate rates to products and the product rules.

### Features/Requirements

- Ability to upload rates and assign rates to products
- A generic engine that leverages the uploaded rates to calculate modal premiums
- Access for organization providers to rates within FireLight or Foresight/Other engine
- Ability to deploy rates and quoting information from one environment to another
- Ability to easily map client data to Firelight (i.e. Risk Classes)
- Currently limited to Term products only.

### **Admin Changes**

- Quoting view for Admin user to set quoting information
- Group options to disable/enable the quoting views in the Admin tool and the Application portal
- Update the existing product scope (regular and B/D) to include quoting data for deployments
- New quoting scope for deployment of product rate information
- Ability to upload rates, assign the rates to products, and expire rates as needed
- Ability to create product limits- to filter products based on jurisdictions, term period, age, and face amount
- Quoting configuration information that can be changed on a product basis (i.e. product fee)
- Ability to assign product details to products within the Admin tool
- Ability to assign a company rating to an organization

### **App Changes**

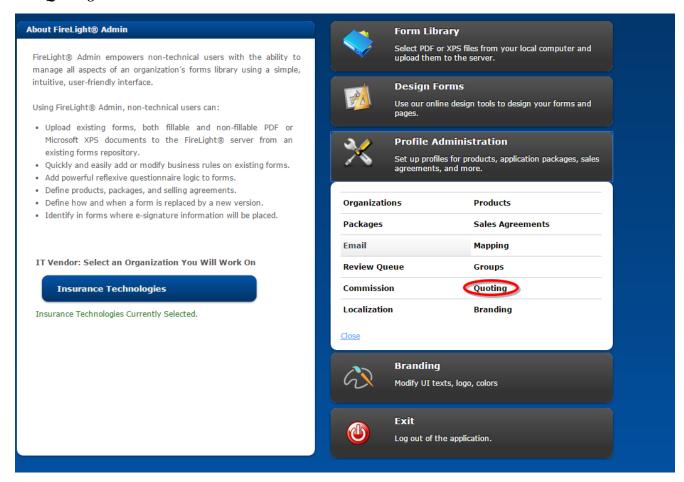
- Quoting view to run comparisons between products, and then select a product and create an application based on the comparison
- Update to the login process to allow user to go directly to quoting from the login screen
- Web service to access quoting information directly
- Access for organization providers to product premium information





### **UI Mock Ups**

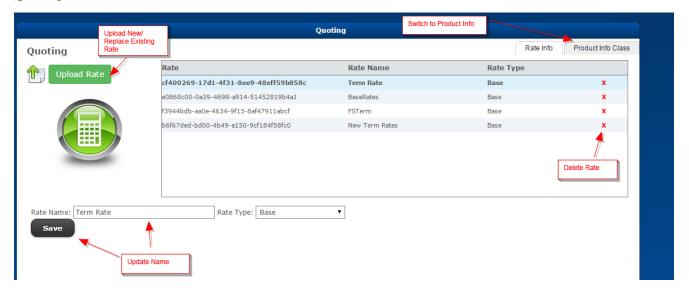
#### New Quoting Link within the Admin Tool



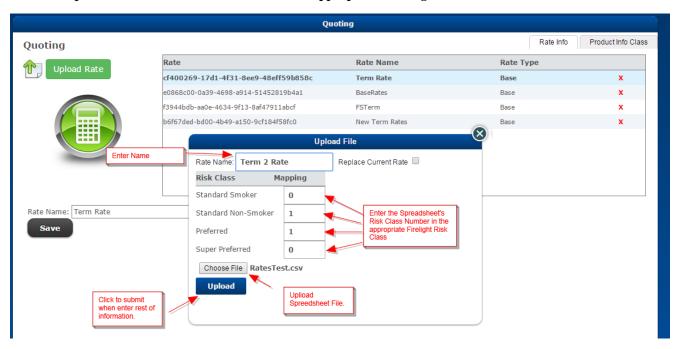




#### Quoting Rate View



#### Enter the spreadsheet's Risk Class Number in the appropriate Firelight Risk Class.







#### Example Spreadsheet Format (enter in .csv or .xlsx).

|   | 1      | : Jx Gender |            |           |       |          |   |  |
|---|--------|-------------|------------|-----------|-------|----------|---|--|
|   | Α      | В           | С          | D         | E     | F        | ( |  |
| 1 | Gender | Risk Class  | Level Peri | Issue Age | Band  | Rate     |   |  |
| 2 | 1      | 0           | 30         | 18        | 99999 | 0.001543 |   |  |
| 3 | 1      | 0           | 30         | 19        | 99999 | 0.001543 |   |  |
| 4 | 1      | 0           | 30         | 20        | 99999 | 0.001543 |   |  |
| 5 | 1      | 0           | 30         | 21        | 99999 | 0.001543 |   |  |
| 6 | 1      | 0           | 30         | 22        | 99999 | 0.001543 |   |  |
| 7 | 1      | 0           | 30         | 23        | 99999 | 0.001543 |   |  |
| 0 | 4      | 0           | 20         | 24        | 00000 | 0.001542 |   |  |

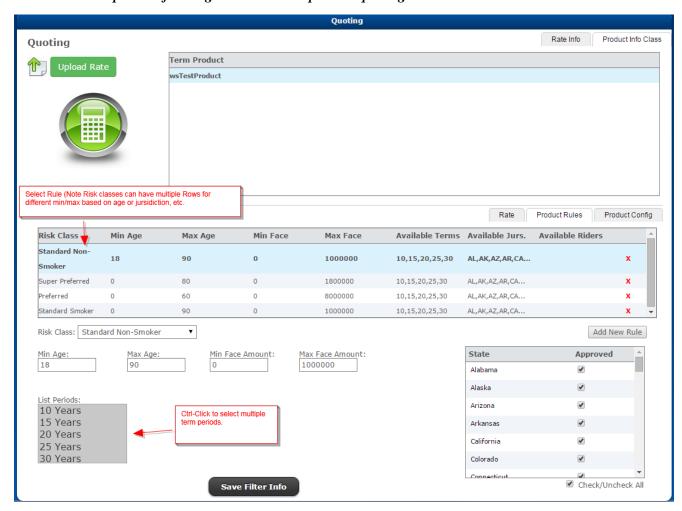
#### Assigning Rate to Product







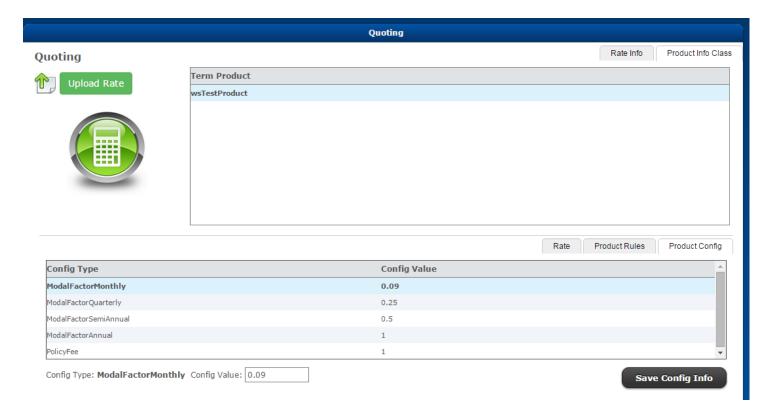
Product Rules-- product filtering is based on the product quoting rules.



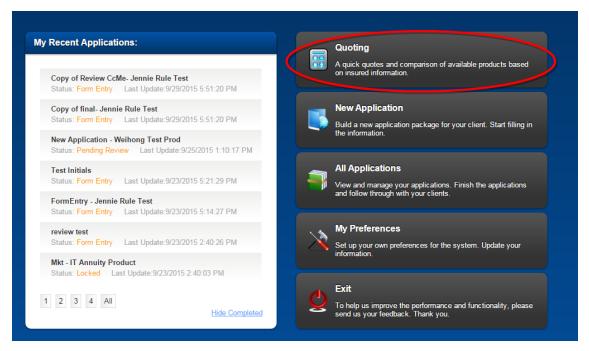




#### Configuration Information



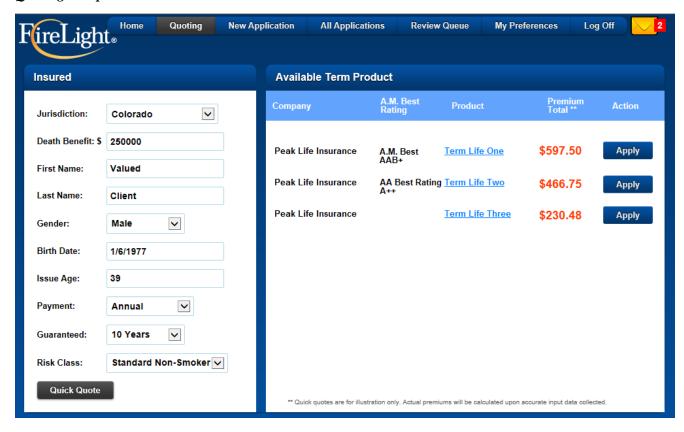
#### New Quoting Link within App Portal







#### Quoting Comparison View







## **Areas Impacted**

| Arcas Impacteu           |     |   |
|--------------------------|-----|---|
| System Area              | Yes | Comment   |
| Admin Tool               | Y   |   |
| - Form Library           | N   |   |
| - Design Forms           | N   |   |
| - Profile Administration | Y   | New quoting view  |
| - Reports                | N   |   |
| - Deployment             | Y   | Updates to product scope and addition of quoting scope. |
| - Groups                 | Y   | New group option flag                                   |
| -                        |     |   |
| FireLight App            |     |   |
| - New Application        | Y   | New path to create application                          |
| - Edit Application       | N   |   |
| - Signature Process      | N   |   |
| - Review Queue           | N   |   |
| - Manual Review          | N   |   |
| - User Preferences       | N   |   |
| - Inbound Integration    | Y   | Changes to passive call process and new web service     |
| - Outbound Integration   | N   |   |
| - PDF Generation         | N   |   |
|                          |     |   |
| FireLight Console        | N   | Option not available in console                         |
| - Windows O/S            | N   |   |
| - iOS                    | N   |   |
| - Android                | N   |   |
| -                        |     |   |
| Other Systems            | N   |   |
| - DTCC Integration       | N   |   |





| - Commission netting | N |  |
|----------------------|---|--|
| - Activity Reporting | N |  |