iConnect 159837 Design Approach

Project Overview

Extend preferences so that we can add agent level credentials for Redtail and other CRM's in the future. When an organization is setup to use Redtail, the credentials are either stored with the organization settings or they are entered by the agent through a cover page form. With this enhancement, the agent will be able to enter their credentials in preferences one time and when the CRM call to Redtail occurs, the credentials will not need to be re-entered.

Features/Requirements

- Add section to preference to set retail credentials
- Add User Group option to disable/enable setting for displaying this option. "Enable Crm Preferences"
- Ensure it is extendable for other CRM credentials in the future.

Use Cases / Workflow Changes

N/A

Admin Changes

User Group option for enabling this.

App Changes

Preference page will be changed to show a drop down for selecting CRM. A text box for password and a textbox for username.

Integration Changes

N/A

UI Mock Ups

How to Enable and Use This Feature

[Instructions on how to enable and use the feature within FireLight. Provide instructions for Admin and App]

Areas Impacted

System Area	Yes	Comment
Admin Tool	x	
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		
FireLight App	x	
- New Application		
- Edit Application		
- Signature Process		
- 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		