

iConnect 180225 Design Approach

Project Overview

The goal of this project is to provide an email notification to the reviewer when the agent replies to a More Info request within an Activity sent from the Review Queue.

Features/Requirements

- Create an email template to send back to the Review Queue reviewer when the user clicks on [Reply] to a More Info request in the activity.
- Email Template Name will be “Review Queue More Info Reply”
- Email Template verbiage is as follows:
Subject: Reviewer – More Info Received: <APPLICATION_NAME>
Dear <REVIEWER_NAME>,

<AGENT_NAME> has replied to your request for More Info for the following case, <APPLICATION_NAME>. Please log into Firelight at your earliest convenience to review.

<MESSAGE>
- This enhancement applies to both the Pre-Submit Manual review queue and the Post-Submit OSJ review queue.
- E-mail notification requirements:
OSJ Post-Submit Review Queue
 - The email used for the reviewer is the email address stored when the application order is locked. This is will be from one or two sources:
 - Email address entered in the Preferences, User Email Address.
 - Email address entered in the Admin Tool, Profiles, Review Queue Email Group.
 - If both of these sources exists, email is sent to both.
 - If both of these sources do not exist, no email is sent.
- Pre-Submit Manual Review Queue
 - The email used for the reviewer is the email address locked with the order. This is will be from one source:
 - Email address or addresses selected when the Request Review email is sent. Note that one or more email addresses can be sent; it only applies to the reviewer that locks the application order.

Use Cases / Workflow Changes

1. Email will be sent whenever a user clicks [Reply] in the More Info dialog that appears when a transaction is opened with a pending More Info Review Queue request.
2. Email will be sent each time [Reply] is clicked. Note that multiple replies may be sent in the same activity request.

Admin Changes

Add the new email template listed in requirements to be used whenever a user replies back to the reviewer from a Review Queue More Info request. See the requirements for the name and layout of the email template.

UI Mock Ups

Request More Info	User Name: Cynthia_COSC
9/25/2018 6:56:27 PM	Sending another request to test. Reply
Info Received	User Name: Cynthia_COSC
9/24/2018 10:25:14 PM	sending more info to the reviewer to see the email template.
Request More Info	User Name: Cynthia_COSC
9/24/2018 10:24:36 PM	see more info Reply

How to Enable and Use This Feature

1. Send More Info requests from the pre-submit manual review queue and the post-submit OSJ review queue.
2. Set up the reviewer email notification in the combinations described in the requirements section to be sure all are functioning.
3. Verify the reviewer gets an email for each [Reply] to the More Info request within an activity.
4. Verify you see the email template listed in the Admin, Profiles, Email section.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		
- Reports		
- Deployment		
- Email	-	Added new email template to Admin, Profiles, Email.
FireLight App		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		Generate email to reviewer when More Info reply is sent from an activity.
- Manual Review		Generate email to reviewer when More Info reply is sent from an activity.
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		