

# iConnect 127624 Design Approach

FireLight supports an optional Manual Review queue capability within the system. If the “Allow E-Approval” setting at the organization level is set, the system will allow the agent to either submit the application or send an email request to one or more reviewers.

This enhancement is intended to extend the capabilities to allow rules within the application to determine if the agent has the option to submit the application directly, bypassing the review step, or if they are forced to go through the review process.

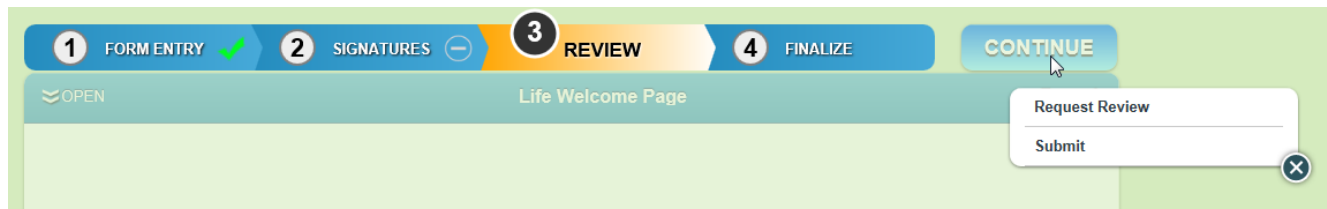
## Workflow Changes

The dialog to allow the user to select either “Request Review” or “Submit” will not be shown if the following conditions are met:

1. The organization setting to enable “Allow E-Approval” must be set.
2. FLI\_DISABLE\_ACTION is set to “BypassEApproval”.

The user will be immediately taken to the Manual Review request dialog so they can send the request to one or more reviewers.

The advisor will not be able to submit the application until the reviewer approves the application. If they cancel an outstanding review request and clicks “Continue” again, they will be redirected back to the Manual Review request dialog.



*Figure 1 Manual Review option*

**1** FORM ENTRY 
**2** SIGNATURES 
**3** REVIEW
**4** FINALIZE

**Send Email To Reviewer(s)**

Your recipients will receive an email message with instructions to complete the electronic application process.

Your Name:

Your Email:

[Add Reviewer](#)
[Reset](#)

Subject:

Dear Reviewer,

Please review the following client's application for 'Sage Term' of Sagacor

Click on th link at the bottom of the email to review and approve the appli

Please use the Passcode to login. I will be providing this Passcode via p

If you have questions please feel free to contact me.

Sincerely,

SAG Producer

To review the application, click on [URL\_LINK], and enter the Passcode.

Passcode for Reviewers: ZNRZKVWE

**Send Email Request**

**Cancel**

*Figure 2 Manual Review Request*

## Requirements/Assumptions

- Ability to dynamically enable/disable the ability of the agent to bypass the review step and submit application directly.
- Modify the system to determine if the Manual Review option dialog (Figure 1) is shown based on the state of FLI\_DISABLE\_ACTION data point within the application.
- The user will not be allowed to decline to use E-Approval or cancel an outstanding request to circumvent the review step.

## Admin Changes

No changes are needed to the Admin tool.

## App Changes

See workflow changes.

## Integration Changes

An external system can be leveraged to set the well-known data point within the application in one of two ways:

1. If the information is known before entering into FireLight, a new data point within an extension of the 1228 can be used by the custom integration provider to set the FLI\_DISABLE\_ACTION data item when the application is first created.
2. A form rule could call into the custom integration provider through a custom action (callextenal rule node triggered when FLI\_PERCENT\_COMPLETE data point is 100%) when the application reaches 100%. The custom integration provider could make an outbound call to an external endpoint to determine if the FLI\_DISABLE\_ACTION data point should be set or not.

Another possibility that was researched is to leverage the second Can Sell check, which is called immediately before the application is locked down for signatures. This call is implemented through the custom integration provider which has access to all of the application data to make an outbound call to an external endpoint. However, the provider does not have the ability to update the data after the call, which is needed for the rest of the process to work. A major change would be needed to modify the provider to have the ability to alter the application data.

## Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
▪ <b>Form Library</b>		
▪ <b>Design Forms</b>		
▪ <b>Profile Administration</b>		
▪ <b>Reports</b>		
▪ <b>Deployment</b>		
<b>FireLight App</b>		
▪ <b>New Application</b>		
▪ <b>Edit Application</b>	X	The workflow can be altered to force the advisor to leverage the Manual Review feature.
▪ <b>Signature Process</b>		
▪ <b>Review Queue</b>		
▪ <b>Manual Review</b>	X	
▪ <b>User Preferences</b>		
▪ <b>Inbound Integration</b>		
▪ <b>Outbound Integration</b>		
▪ <b>PDF Generation</b>		

<b>FireLight Console</b>		
▪ <b>Windows O/S</b>		
▪ <b>iOS</b>		
▪ <b>Android</b>		
<b>Other Systems</b>		
▪ <b>DTCC Integration</b>		
▪ <b>Commission netting</b>		
▪ <b>Activity Reporting</b>		