
Enhance Save Logic for Groups, Product Access and Needs
Filter

FIRELIGHT BASE

FireLight®

Platform

ENHANCE SAVE LOGIC FOR GROUPS, PRODUCT ACCESS AND NEEDS FILTER

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Insurance Technologies, LLC

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iConnect 243551 Design Approach - Enhance Save Logic for Groups, Product Access and Needs Filter

Project Overview

Changes can be made to the Product Access and Needs Filter by Organization dropdown selection. Currently, the save logic on the Groups setting does not capture all changes made at an Organization level on the History tab. Enhancements will be made to add the Organization name to the change made by role on the Group History. The Groups, Product Access View will also be restored to the pre-2.20 release view.

1 Restore the Groups, Product Access View from 2.20 Release Change

A temporary change was implemented for the April 2.20 release to guide users to manually save prior to changing Organizations on the Product Access tab. The August 2.21 release will implement a change to the save logic, allowing for the Product Access page to be restored to its original design.


Remove the phrase, "Changes must be saved before selecting new Organization"


Restore the location of "Check/Uncheck All" to its original position, next to the Organization dropdown menu.

Before enhancement:

Groups - FL Access Carrier

Groups

 [Create New](#)



Name ▼	TC Role Code	
Agent	FLA10	X
Default	Default	X
Firm Admin/Support	FLA25	X
Insurance Technologies	InsTech	X
Registered Representative	FLA20	X
Reviewing Principal	FLA30	X
Test	123	X
UNICO	UNICO	X

Last Updated On : 3/11/2021 2:43 AM UTC

Name

Illustration Services Role Code

TC Role Codes

App

Admin

Review Queue

Activity Access

Product Access

Case Access

Needs Filter

Debugging Tools

Training

Group History

Organization: FL Access Carrier Changes must be saved before selecting new Organization

☐ Check / Uncheck All

- ☒ Accumulation Product
- ☒ Annuity Care Plus
- ☒ Classic Term
- ☒ eDelivery Deliver Only
- ☒ EITS Wizard Product
- ☒ Fee and Expense Inquiry
- ☒ Forms
- ☒ Income Choice
- ☒ iSured Lifetime Income
- ☒ L&A
- ☒ Multi-Activity
- ☒ New York Life Post Issue
- ☐ Pre-Sale Demo
- ☒ Reviewer Document test

- ☒ Annuity 222
- ☒ Annuity Rates DRAFT
- ☒ Death Benefit Product
- ☒ eDelivery Fill and Sign
- ☒ Elite Term
- ☒ Financial Protection
- ☒ Future Advantage
- ☒ Income Provider Plus
- ☒ iSured Term
- ☒ Lifetime Income
- ☒ Need Determination
- ☒ NIGO Corrections
- ☒ Qualified Account Opening
- ☒ Sage Term


- ☒ Annuity 333
- ☒ BL Test Product
- ☒ Demo Wizard Product
- ☒ eDelivery Sign Only
- ☒ Essential Term
- ☒ FL Test Training Product
- ☒ Generic Subpay
- ☒ Index Select
- ☒ Kevin Test Product
- ☒ Magnum UL
- ☒ New Age Income (Digital Only)
- ☒ Non-Qualified Account Opening
- ☒ Retirement Income Max
- ☒ Schwab Demo Product


Save

After enhancement:

Groups - FL Access Carrier

Groups

 [Create New](#)



Name ▼	TC Role Code	
Agent	FLA10	X
Default	Default	X
Firm Admin/Support	FLA25	X
Insurance Technologies	InsTech	X
Registered Representative	FLA20	X
Reviewing Principal	FLA30	X
Test	123	X
UNICO	UNICO	X

Last Updated On : 3/11/2021 2:43 AM UTC

Name

Illustration Services Role Code

TC Role Codes

FLA10

App

Admin

Review Queue

Activity Access

Product Access

Case Access

Needs Filter

Debugging Tools

Training

Group History

Organization: FL Access Carrier ☐ Check / Uncheck All

- ☒ Accumulation Product
- ☒ Annuity Care Plus
- ☒ Classic Term
- ☒ eDelivery Deliver Only
- ☒ EITS Wizard Product
- ☒ Fee and Expense Inquiry
- ☒ Forms
- ☒ Income Choice
- ☒ iSured Lifetime Income
- ☒ L&A
- ☒ Multi-Activity
- ☒ New York Life Post Issue
- ☐ Pre-Sale Demo
- ☒ Reviewer Document test

- ☒ Annuity 222
- ☒ Annuity Rates DRAFT
- ☒ Death Benefit Product
- ☒ eDelivery Fill and Sign
- ☒ Elite Term
- ☒ Financial Protection
- ☒ Future Advantage
- ☒ Income Provider Plus
- ☒ iSured Term
- ☒ Lifetime Income
- ☒ Need Determination
- ☒ NIGO Corrections
- ☒ Qualified Account Opening
- ☒ Sage Term

- ☒ Annuity 333
- ☒ BL Test Product
- ☒ Demo Wizard Product
- ☒ eDelivery Sign Only
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- ☒ FL Test Training Product
- ☒ Generic Subpay
- ☒ Index Select
- ☒ Kevin Test Product
- ☒ Magnum UL
- ☒ New Age Income (Digital Only)
- ☒ Non-Qualified Account Opening
- ☒ Retirement Income Max
- ☒ Schwab Demo Product

Save



Acceptance Criteria

- Groups, Product Access does not display, "Change must be saved before selecting new Organization".
- Groups, Product Access displays "Check/Uncheck All" next to the dropdown for Organization.

2 Enhance the Group History with Organization Detail

The Group History currently does not reflect the Organization in which the change was made for by role. Enhancing the Group History with the Organization detail will allow more information for the clients to determine what changes were made to the Activity Access and Needs Filter by Organization and role.

Group History before enhancement:

Groups
 [Create New](#)


Name ▼	TC Role Code	
Agent	FLA10	X
Default	Default	X
Firm Admin/Support	FLA25	X
Insurance Technologies	InsTech	X
Registered Representative	FLA20	X
Reviewing Principal	FLA30	X
Test	123	X
UNICO	UNICO	X

Last Updated On : 3/12/2021 6:24 PM UTC

Name Illustration Services Role Code TC Role Codes


App Admin Review Queue Activity Access Product Access Case Access Needs Filter Debugging Tools Training Group History


Action	Old Value	New Value	Action Date	Login
Agent, Annuity Rates DRAFT Product Access added			3/12/2021 11:24:27 AM	Abi_FLADEMO
Agent saved and updated.			3/12/2021 11:24:27 AM	Abi_FLADEMO
Agent, Annuity Rates DRAFT Product Access removed			3/12/2021 11:23:41 AM	Abi_FLADEMO
Agent saved and updated.			3/12/2021 11:23:41 AM	Abi_FLADEMO
Agent saved and updated.			3/10/2021 7:43:07 PM	fiademo_it
Agent, Allow Edits to Mobile was enabled	Disabled	Enabled	3/10/2021 7:43:07 PM	fiademo_it
Agent saved and updated.			3/10/2021 7:39:19 PM	fiademo_it
Agent, Allow Edits to Mobile was disabled	Enabled	Disabled	3/10/2021 7:39:19 PM	fiademo_it
Agent saved and updated.			3/8/2021 1:07:59 PM	Rachel_FLADEMO
Agent, Enable Viewing of Rule Trace was enabled	Disabled	Enabled	3/8/2021 1:07:59 PM	Rachel_FLADEMO

Prev Next

Save

Group History after enhancement:

Groups
 [Create New](#)



Name ▼	TC Role Code	
Agent	FLA10	X
Default	Default	X
Firm Admin/Support	FLA25	X
Insurance Technologies	InsTech	X
Registered Representative	FLA20	X
Reviewing Principal	FLA30	X
Test	123	X
UNICO	UNICO	X

Last Updated On : 5/4/2021 12:07 PM UTC

Name
Illustration Services Role Code
TC Role Codes

App Admin Review Queue Activity Access Product Access Case Access Needs Filter Debugging Tools Training **Group History**

Action	Old Value	New Value	Action Date	Login
Agent, Annuity 222 Product Access added for Organization FL Access Carrier			5/4/2021 6:07:01 AM	Abi_FLADEMO
Agent, BL Test Product Product Access added for Organization FL Access Carrier			5/4/2021 6:07:01 AM	Abi_FLADEMO
Agent saved and updated.			5/4/2021 6:07:01 AM	Abi_FLADEMO
Agent, BL Test Product Product Access removed for Organization FL Access Carrier			5/4/2021 6:06:48 AM	Abi_FLADEMO
Agent, Annuity 222 Product Access removed for Organization FL Access Carrier			5/4/2021 6:06:48 AM	Abi_FLADEMO
Agent saved and updated.			5/4/2021 6:06:48 AM	Abi_FLADEMO
Agent, Aura Next UL Product Access added for Organization FL Access			5/3/2021 2:52:23 PM	cynthia_flademo

Acceptance Criteria

- Changes made on the Product Access tab are reflected in Group History by role with the Organization name detail.
- Changes made on the Needs Filter tab are reflected in Group History by role with the Organization name detail.