

iConnect Design Approach - Allow carrier to configure distributor deployment distros

Project Overview

Carriers want the ability to specify the Distributor notification distro independently of the distributor configuring it themselves. With this, we will need to modify the sales agreement UI and add a field to collect all distributor email addresses. Multiple email addresses will be allowed using semi colon. This information will then be passed to a new column that will be added to Organization sync table. The Organization sync table is currently housed in the Master Configuration Database. Finally, a code change will need to be implemented to include the email addresses in this new field for deployments to the organization.

Carrier Define Distributor Deployment Distros Impact:

- Carrier Admin: New setting to define distributor distros
- Deployment distro

Requirements / User Stories

Add Column in Organization sync

We will need to add a column to the OrganizationSync table to hold the notification email addresses that will be entered into the new field we install into the sales agreement titled Deployment Group Email. This table is located in the Master Configuration Database and will store all email addresses that have been entered into the new Deployment Group Email field.

Acceptance Criteria

- Email addresses are entered the Deployment email group field. A semi colon must be used between each email address and saved.
- All email addresses entered the Deployment email group field will be stored in the new column created in the OrganizationSync table. This table can be found in the Master Configuration Database.

Add Email field to Sales Agreement

We need to be able to collect all notification email addresses in the Sales Agreement tab for each Carrier-Distributor combination. Once collected they will be sent to the OrganizationSync table. To accomplish this, we will need to create a new email collection text field in the sales agreement in the admin. This text field will function the same way as the Deployment Notification Email field does in the Organization tab. This will just be in addition to the org setting. This includes having multiple email addresses separated by semi colon and a given tool tip to assist the user.

Only send one email if the same email is setup in both the new selling agreement distro and the original Org level distro. FL should only send 1 email per user.

Sales Agreement Details		Sales Agreement History	
Selling Org	Brokers International ▼		
Deploy Email Group			
Product Name			
More Info			
Start		End	
Time Zone	MST - Mountain Standard Time ▼		
Replace Product	Select Replaced Product ▼		
Illust Services Role			
Last Updated	1/1/0001 12:00 AM UTC		

Sales Agreement Details		Sales Agreement History	
Selling Org	Brokers International ▼		
Deploy Email Group	<input type="text" value="Enter multiple email addresses separated by semicolons"/>		
Product Name			
More Info			
Start		End	
Time Zone	MST - Mountain Standard Time ▼		
Replace Product	Select Replaced Product ▼		
Illust Services Role			
Last Updated	1/1/0001 12:00 AM UTC		

Acceptance Criteria

- New Distributor Email field allows multiple emails to be entered with semicolons separating each email address
- Tool tip is included to assist the user with imputing emails correctly
- Tool tip text will read "Enter multiple email addresses separated by semicolons"
- Validate that we still send the emails that are setup in the organization email distro
- Validate that if the same user is setup in both the new selling agreement distro and the original Org level distro, that only 1 email is sent to the user.

Code change for Deployments

A code change is needed to include all email addresses entered in the Deployment Group Email field for deployments to the selected organization.

Acceptance Criteria

- Email addresses entered in the Deployment Group Email must be included in the deployment process