

iConnect 153534 Design Approach

Provide a CRM option to access the Whitepage's API.

Workflow Changes

- Create a new CRM type for Whitepages.
- Add a new Custom Action option for Admin.
- Make minor changes to the CRM dialog box for Whitepages.

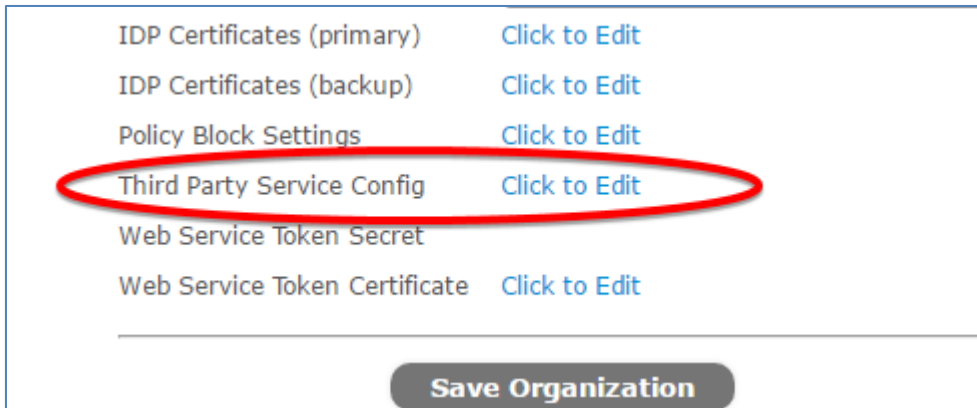
Features/Requirements

- Allow User to call Whitepages API from the CRM.

Admin Changes

No Changes to Admin except for adding the Whitepages credentials.

1. In Admin, Organizations - Add ReversePhoneAPIKey in the Third Party Service Config.

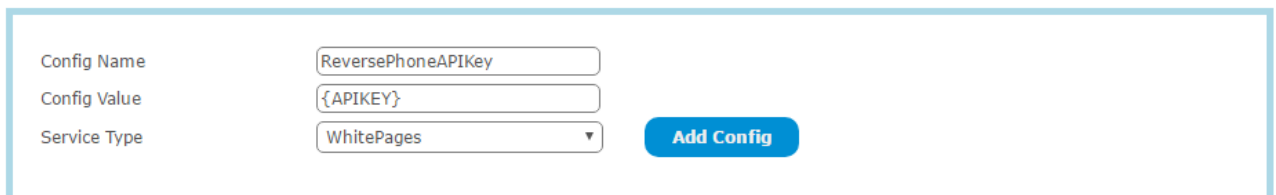


IDP Certificates (primary)	Click to Edit
IDP Certificates (backup)	Click to Edit
Policy Block Settings	Click to Edit
Third Party Service Config	Click to Edit
Web Service Token Secret	
Web Service Token Certificate	Click to Edit

Save Organization

2. The API Key is supplied to firms once the contracting is complete with Whitepages. Please contact Whitepages for your key or contact kdease@insurancetechnologies.com.

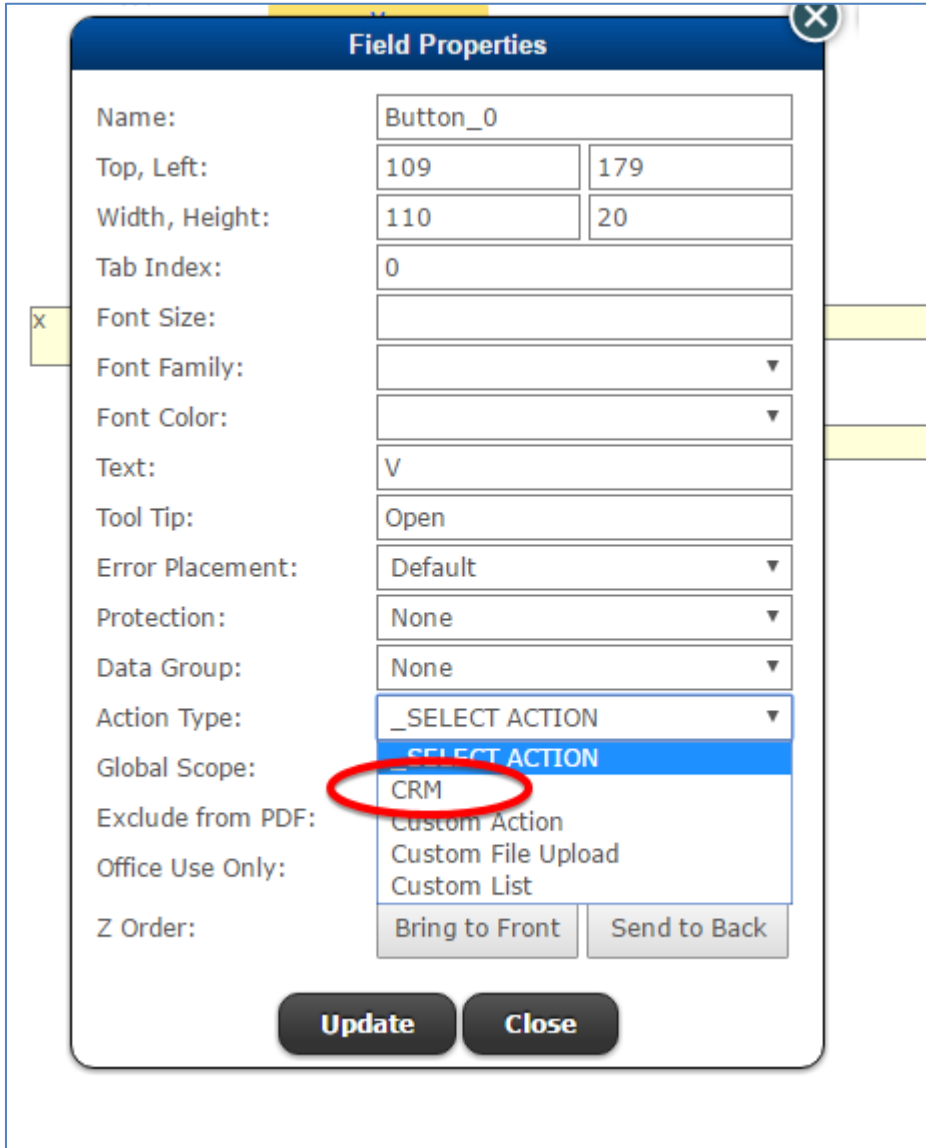
[Add New](#)



Config Name	<input type="text" value="ReversePhoneAPIKey"/>
Config Value	<input type="text" value="{APIKEY}"/>
Service Type	<input type="text" value="WhitePages"/>

Add Config

3. Create the CRM button control in FireLight Admin using the form Designer.



Field Properties

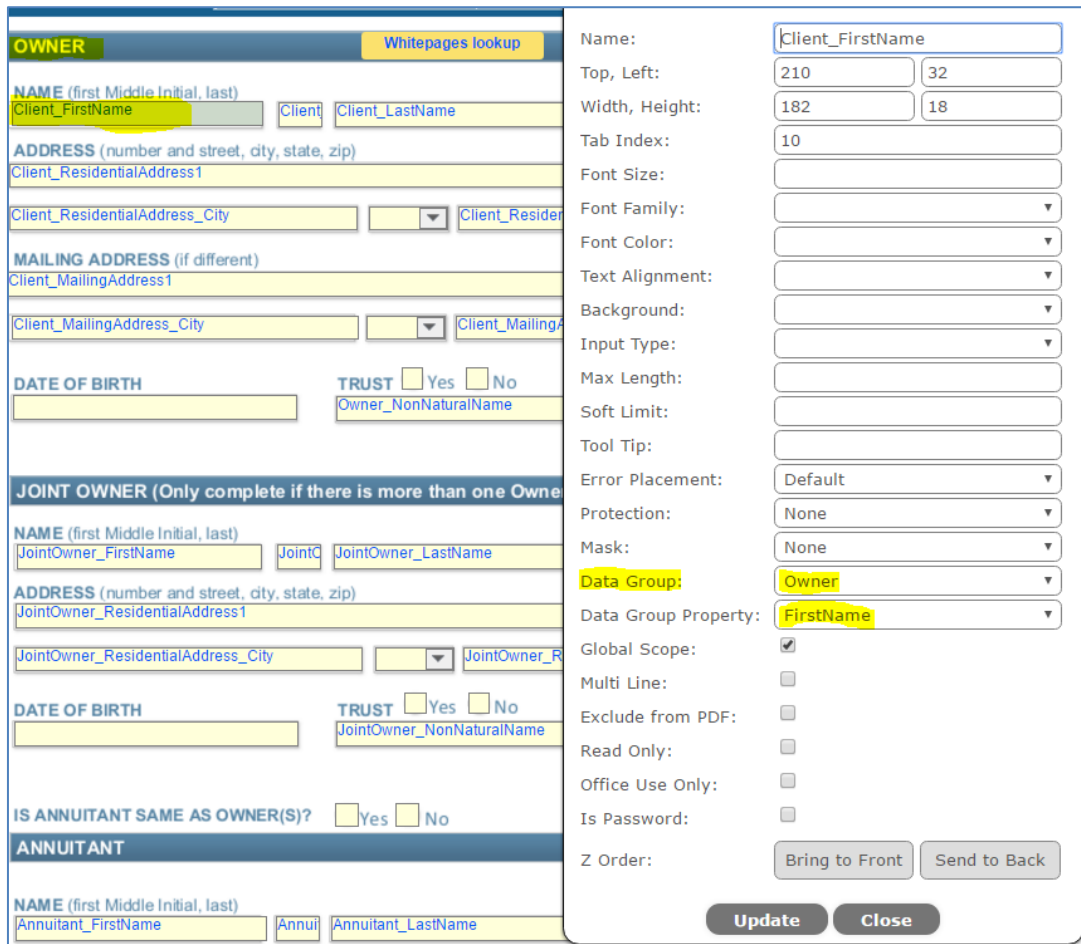
Name:	Button_0	
Top, Left:	109	179
Width, Height:	110	20
Tab Index:	0	
Font Size:		
Font Family:		
Font Color:		
Text:	V	
Tool Tip:	Open	
Error Placement:	Default	
Protection:	None	
Data Group:	None	
Action Type:	_SELECT ACTION	
Global Scope:	SELECT ACTION	
Exclude from PDF:	CRM	
Office Use Only:	Custom Action	
	Custom File Upload	
	Custom List	
Z Order:	Bring to Front	
	Send to Back	

Update **Close**

Set Action Type to CRM and set CRM Parameter to WP_[Prefix]. This determines the CRM Action is Whitepages.

Action Type:	CRM
CRM Parameter:	WP_Owner

4. All of the following fields are available to map. In order to pull in these values, you need to set the Data Group Property for each field.
 - FirstName
 - MiddleName
 - LastName (FullName for Businesses)
 - Gender
 - DiaNumber
 - AreaCode (LineType is mapped in this field)
 - Line1
 - Line2
 - City
 - AddressStateTC
 - Zip
5. To set the data group properties, open a form field that you want to map.
 - a. The **Data Group** should be set to that person type for this set of data (Owner = owner, Annuitant = Annuitant, Beneficiary = Beneficiary, etc). In other words, the Data Group will assign whose data is being pulled.
 - b. Then set the **Data Group Property** to define what data to pull from Whitepages.



The screenshot displays the 'OWNER' section of a form editor. The left pane shows the form fields, and the right pane shows the configuration options for the selected field.

Form Fields (Left Pane):

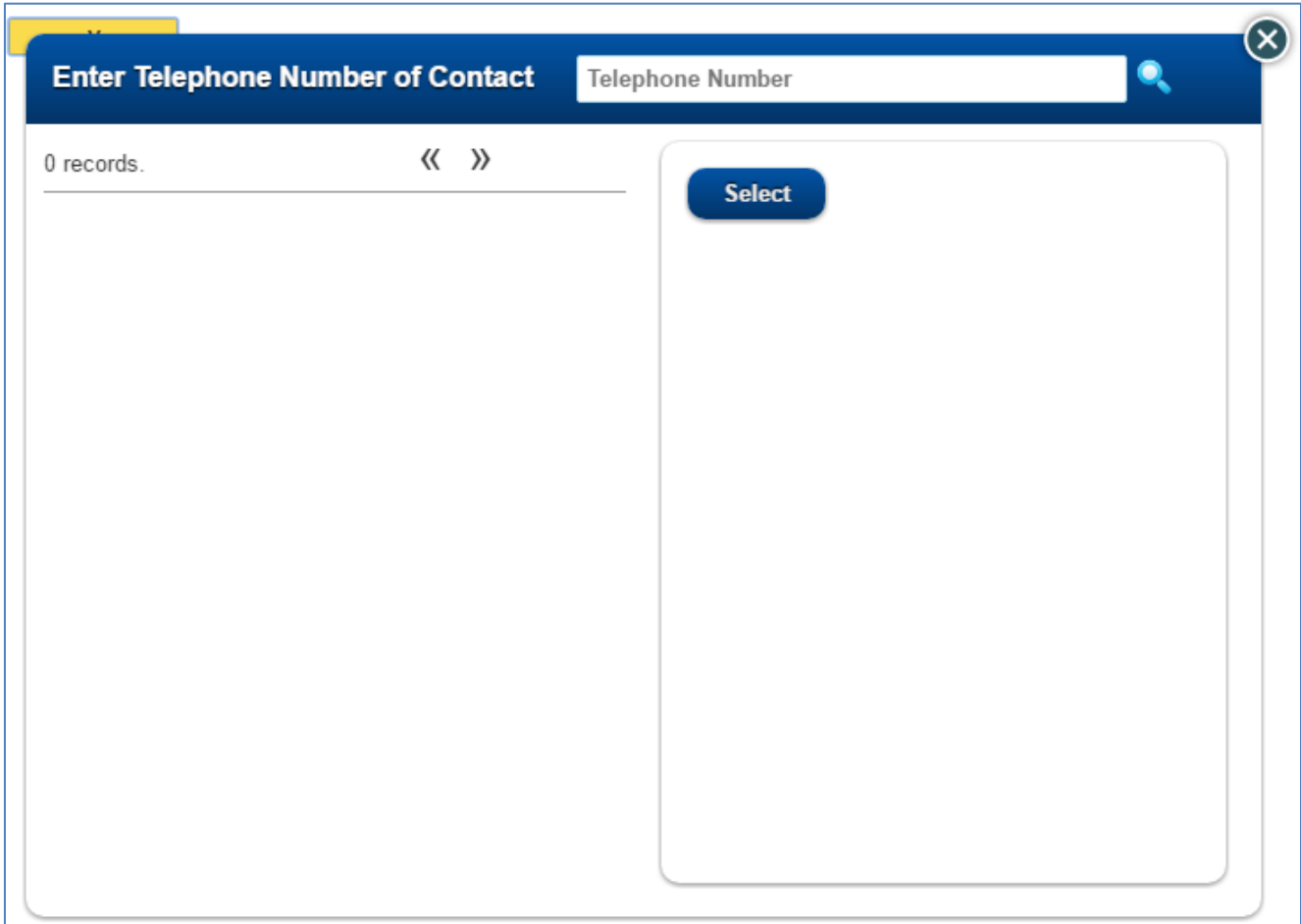
- OWNER** (Section Header)
- NAME** (first Middle Initial, last)
 - Client_FirstName
 - Client_LastName
- ADDRESS** (number and street, city, state, zip)
 - Client_ResidentialAddress1
 - Client_ResidentialAddress_City
- MAILING ADDRESS** (if different)
 - Client_MailingAddress1
 - Client_MailingAddress_City
- DATE OF BIRTH**
- TRUST** Yes No
 - Owner_NonNaturalName
- JOINT OWNER** (Only complete if there is more than one Owner)
 - JointOwner_FirstName
 - JointOwner_LastName
 - JointOwner_ResidentialAddress1
 - JointOwner_ResidentialAddress_City
 - JointOwner_DATE OF BIRTH
 - JointOwner_TRUST Yes No
 - JointOwner_NonNaturalName
- IS ANNUITANT SAME AS OWNER(S)?** Yes No
- ANNUITANT**
 - Annuitant_FirstName
 - Annuitant_LastName

Configuration Options (Right Pane):

- Name: Client_FirstName
- Top, Left: 210 32
- Width, Height: 182 18
- Tab Index: 10
- Font Size:
- Font Family:
- Font Color:
- Text Alignment:
- Background:
- Input Type:
- Max Length:
- Soft Limit:
- Tool Tip:
- Error Placement: Default
- Protection: None
- Mask: None
- Data Group:** Owner
- Data Group Property:** FirstName
- Global Scope: ☒
- Multi Line: ☐
- Exclude from PDF: ☐
- Read Only: ☐
- Office Use Only: ☐
- Is Password: ☐
- Z Order: Bring to Front Send to Back
- Update Close

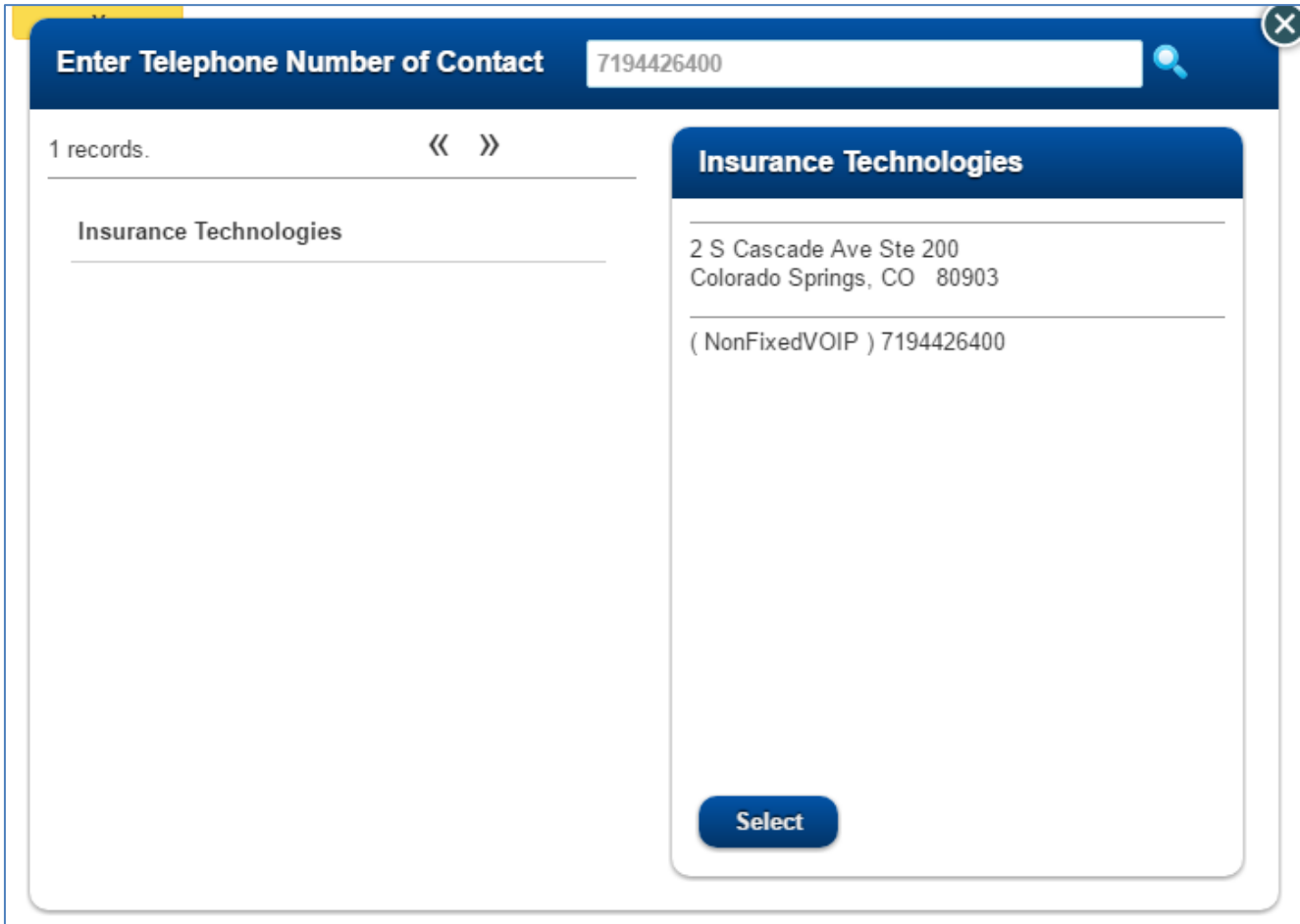
App Changes

Minor changes were made to the CRM dialog box to allow the User to look up a Contact from the Phone Number.



The image shows a CRM dialog box titled "Enter Telephone Number of Contact". It features a search bar labeled "Telephone Number" with a magnifying glass icon. Below the search bar, it displays "0 records." and navigation arrows. A "Select" button is visible on the right side of the dialog box.

The User enters a phone number and clicks the Search button to show the results. User Clicks the Select button to populate the corresponding fields on the form.



Enter Telephone Number of Contact 7194426400

1 records. < >

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2 S Cascade Ave Ste 200
Colorado Springs, CO 80903

(NonFixedVOIP) 7194426400

Select

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms	Y	CRM Parameter now takes into account WP_ prefix
- Profile Administration		
- Reports		
- Deployment		

FireLight App		
- New Application		
- Edit Application	Y	CRM Dialog Changes
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
FireLight Console		
- Windows O/S		
- iOS		
- Android		
-		
Other Systems		
- DTCC Integration		
- Commission netting		
- Activity Reporting		