

## iConnect 177313 Design Approach

### Project Overview

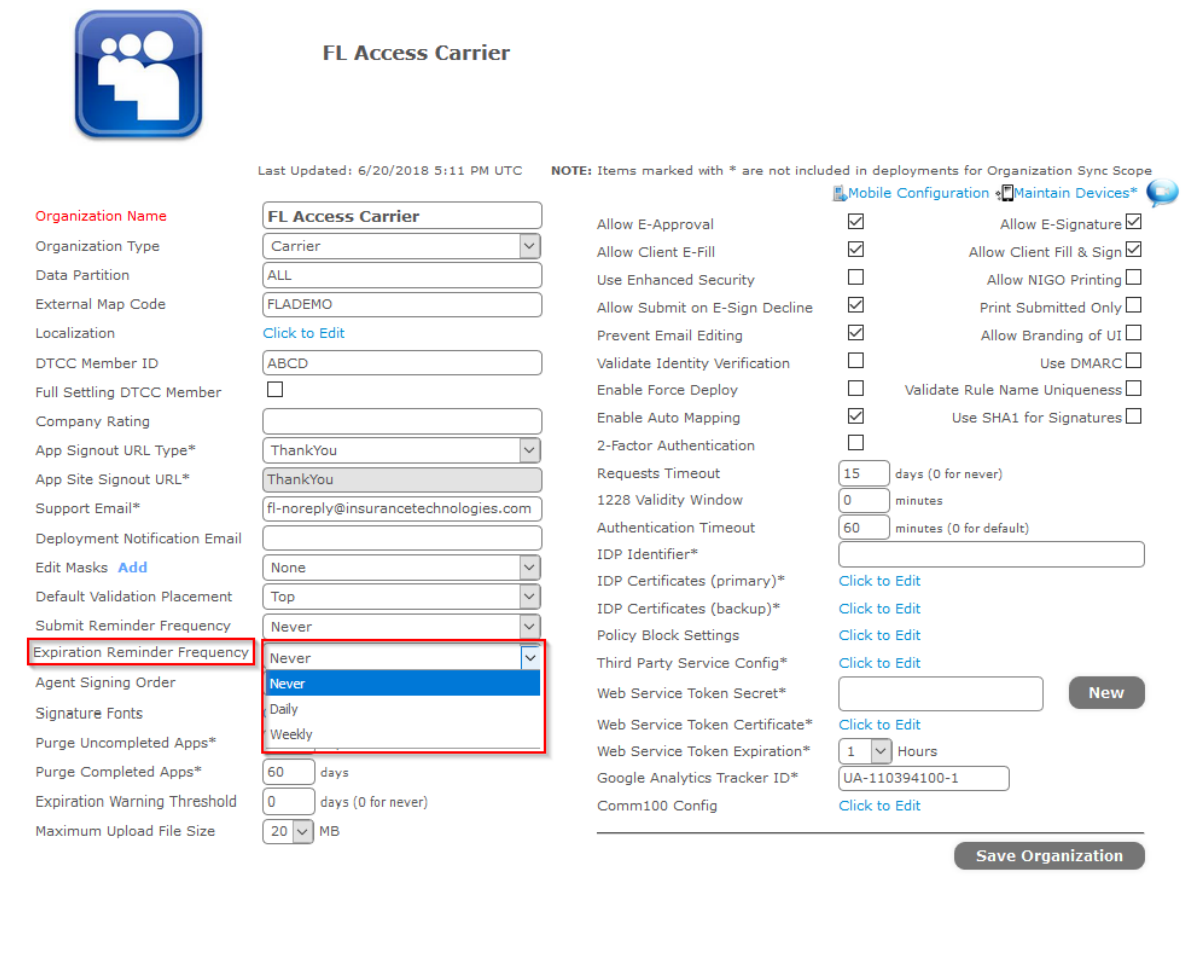
This enhancement will add to the existing “Expiration Warning Threshold” functionality to introduce an “Expiration Warning Frequency” at the organization level that will include an e-mail frequency (Never, Daily, Weekly), allowing the organization to send multiple warnings to the agent/client.

### Features/Requirements

- Create a new expiration reminder frequency setting.
  - This setting can be set to “Never”, “Daily”, or “Weekly”.
- Add the ability to put a [count] variable in e-mail templates to convey the number of days until expiration.

### Admin Changes

This feature can be configured in the Profiles > Organizations section of the admin tool allowing the user to select “Never”, “Daily”, or “Weekly”.



**FL Access Carrier**

Last Updated: 6/20/2018 5:11 PM UTC **NOTE:** Items marked with \* are not included in deployments for Organization Sync Scope

[Mobile Configuration](#) [Maintain Devices](#)

<b>Organization Name</b>	FL Access Carrier	Allow E-Approval	<input checked="" type="checkbox"/>	Allow E-Signature	<input checked="" type="checkbox"/>
Organization Type	Carrier	Allow Client E-Fill	<input checked="" type="checkbox"/>	Allow Client Fill & Sign	<input checked="" type="checkbox"/>
Data Partition	ALL	Use Enhanced Security	<input type="checkbox"/>	Allow NIGO Printing	<input type="checkbox"/>
External Map Code	FLADEMO	Allow Submit on E-Sign Decline	<input checked="" type="checkbox"/>	Print Submitted Only	<input type="checkbox"/>
Localization	<a href="#">Click to Edit</a>	Prevent Email Editing	<input checked="" type="checkbox"/>	Allow Branding of UI	<input type="checkbox"/>
DTCC Member ID	ABCD	Validate Identity Verification	<input type="checkbox"/>	Use DMARC	<input type="checkbox"/>
Full Settling DTCC Member	<input type="checkbox"/>	Enable Force Deploy	<input type="checkbox"/>	Validate Rule Name Uniqueness	<input type="checkbox"/>
Company Rating		Enable Auto Mapping	<input checked="" type="checkbox"/>	Use SHA1 for Signatures	<input type="checkbox"/>
App Signout URL Type*	ThankYou	2-Factor Authentication	<input type="checkbox"/>		
App Site Signout URL*	ThankYou	Requests Timeout	15 days (0 for never)		
Support Email*	fl-noreply@insurancetechnologies.com	1228 Validity Window	0 minutes		
Deployment Notification Email		Authentication Timeout	60 minutes (0 for default)		
Edit Masks <a href="#">Add</a>	None	IDP Identifier*			
Default Validation Placement	Top	IDP Certificates (primary)*	<a href="#">Click to Edit</a>		
Submit Reminder Frequency	Never	IDP Certificates (backup)*	<a href="#">Click to Edit</a>		
<b>Expiration Reminder Frequency</b>	Never	Policy Block Settings	<a href="#">Click to Edit</a>		
Agent Signing Order	Never	Third Party Service Config*	<a href="#">Click to Edit</a>		
Signature Fonts	Daily	Web Service Token Secret*		<a href="#">New</a>	
Purge Uncompleted Apps*	Weekly	Web Service Token Certificate*	<a href="#">Click to Edit</a>		
Purge Completed Apps*	60 days	Web Service Token Expiration*	1 Hours		
Expiration Warning Threshold	0 days (0 for never)	Google Analytics Tracker ID*	UA-110394100-1		
Maximum Upload File Size	20 MB	Comm100 Config	<a href="#">Click to Edit</a>		

[Save Organization](#)

Update current e-mail templates sent for expiration warnings to include a [count] in the message. This gives you the ability to add a field/variable in the message that will pull the number of days remaining until expiration.

## UI Mock Ups

Utilize the current expiration e-mail templates –

Email Template Type

Client Request Expiration Warning

Email Subject Line

Client Request about to Expire

Email Template

Dear <CLIENT\_NAME>,

Your pending request in <TRANSACTION\_TYPE> <APPLICATION\_NAME> is about to expire. Please take all necessary actions that this requires. To complete this request, click on <URL\_LINK> link. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of a new browser window.

Email Template Type

Agent Request Expiration Warning

Email Subject Line

Agent Request about to Expire

Email Template

Dear <AGENT\_NAME>,

Your pending request to <CLIENT\_NAME> in <TRANSACTION\_TYPE> <APPLICATION\_NAME> is about to expire. Please take all necessary actions that this requires.

## How to Enable and Use This Feature

This feature is enabled by setting the Expiration Frequency Reminder in the organization section of the admin tool.

### Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
- Form Library		
- Design Forms		
- Profile Administration	X	Addition of "Expiration Reminder Frequency" in organizations tab.
- Reports		
- Deployment		
<b>FireLight App</b>		
- New Application		
- Edit Application		
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
<b>FireLight Console</b>		
- Windows		
- iOS		
<b>Other Systems</b>		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		