
Allow ability to hide products

FIRELIGHT BASE

FireLight®

Platform

ALLOW ABILITY TO HIDE PRODUCTS

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Insurance Technologies, LLC

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Insurance Technologies, LLC

Two South Cascade Avenue
Colorado Springs, CO 80903
USA

Phone: 719.442.6400

FAX: 719.442.0600

Internet E-Mail: info@insurancetechnologies.com

Website: <http://www.insurancetechnologies.com>

Table of Contents

iConnect 247158 Design Approach - Allow ability to hide products	4
1 Hide CUSIP ID from Activity drop down.....	4

iConnect 247158 Design Approach - Allow ability to hide products

Project Overview

This feature will introduce the ability to control activities from the product selection drop-down. Using a new csv setting at an activity level, firms can define the products to hide from the product selection for that activity. This will allow firms to hide products that are not ready for the agent to access in that activity. This might be used for distributors that want to make illustration available to agents so they cannot deactivate the activity but need to hold a few products back from the illustration. Additionally, this can be used for firms that need the agents to go through the presale for a product. The product can be hidden from the application drop-down but remain visible in the presale drop-down. This feature will be present in both the carrier's and distributor's environments. However, they will be independent of each other, meaning the carrier's setting will not be part of the auto deploy to a distributor's environment.

Impacts:

- FL Admin -> Product Config -> Activities - A new field will be added to All Activities page at the admin side to allow entering comma separated CUSIP IDs. These CUSIP IDs will not appear on the new activity product selection on the user side

1 Hide CUSIP ID from Activity drop down


To allow an activity to not appear in the activity drop down, there will be a new field added on All Activities page at the admin side. Client can enter comma separated CUSIP IDs into this field. These CUSIP IDs will then not appear on the new activity page at user side.


These hidden CUSIP IDs could be accessible in case the users are directly linked towards those CUSIPs through Rules, SSO, Next Steps, Multi-Activity, etc.

This change will be implemented for both Carriers and Distributor environment. CUSIP IDs set to hide by the Carriers will not be deployed to the Distributors. Though Distributors can hide CUSIP IDs of their Carriers in their own environment.

Highlighted section in the below mock-up indicates the new field that will be added to Activities page. This new field "Hide Product CUSIP IDs" will be visible for all types of activities. Hence if CUSIP IDs for

Illustration are entered in this text box, those specific CUSIP IDs will not appear on New Illustration page at UI.


Add New Activity



Activities - FL Access Carrier - Test		
Fee Inquiry	Fee Inquiry	X
Generic Post Issue	Post Issue Services	X
Illustration	Illustration	X
Multiple Activities	Pre-Sale	X
Needs Determination	Pre-Sale	X
New Activity	Pre-Sale	X
Print Forms	Print Forms	X
Quote	Quote	X
Sub-Pay	Subsequent Payment	X
Test Activity	Application	X

Last Updated: 9/1/2021 12:06 PM UTC
Created: 4/24/2019 10:03 PM UTC

Activity Detail
Next Activities
Activity History

Activity Name
ACORD Type
Activity Type
Billing Code
Rank Order
Hide Product CUSIP IDs
Branding Icon (Font Awesome Icons)
Complete Purge Policy
Incomplete Purge Policy
Continue/Apply Label
Allow Pre-Signature Review
Allow Post-Signature Review
Bypass New Activity Prompts
Disable Transfer Data Items to Next Activity
Lock Transferred Data Items
Include InsTech Managed Products

Illustration

Illustration (111)

Illustration

916238361

chart-pie-alt

60

60

Apply

☐

☐

☐

☐

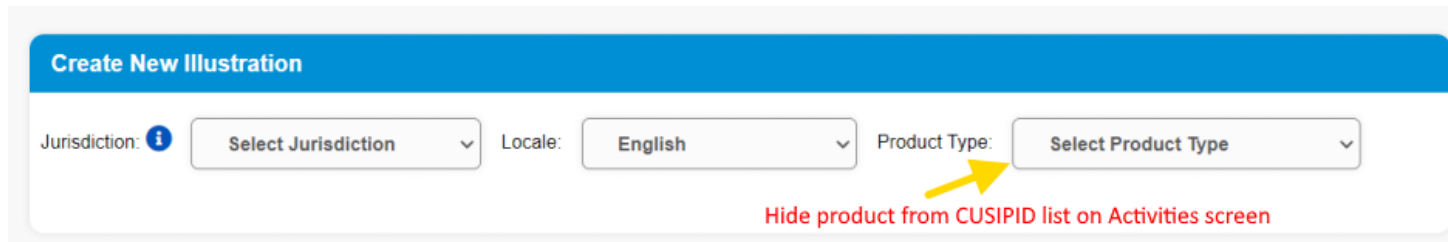
☐

☐

[Edit Activity Pop-up Messages](#)

Save Activity

Below mockup indicates that when CUSIP IDs for Illustration activity are hidden at admin side, those CUSIP IDs will not appear at UI on new Illustration page. Similarly, for other Activities as well admin can restrict Products to be selected from the Start New Activity page.



USE CASE 1: When a hidden 'Application' CUSIP is directly linked to an 'Account Opening' product via a rule.

After the user completed the account opening process and when they continue to apply, that hidden application is presented for the user to fill and submit. Even though the application CUSIP ID is set to be hidden, since it is directly linked with the Account Opening product via a rule, user will be able to access the Application product.

USE CASE 2: On Needs Determination activity, after the activity is complete and user continues to create an application. New application creation page is presented. Hidden Application CUSIP ID should not be listed on this page to create a new application.

USE CASE 3: There is only one Print Forms product "PF123" is assigned to the role code "RC1". And that product (PF123) is set to be hidden on Print Form activity page.

On the app side, when the user clicks at Print Form to start a new application, the system should load PF123 application to fill and print the application.

USE CASE 4: There is more than one Print Forms products assigned to the role code "RC1". And one of the Print Form product "PF123" is set to be hidden on the activity page.

On the app side, when the user clicks at Print Form to start a new application, the system will load start new application page to select a product. On this page, product "PF123" should not be listed for selection.

Acceptance Criteria

- Activities page has a new field added as "Hide Product CUSIP IDs".
- When Product CUSIP IDs are added to this new field, those products do not show up new activity creation page at the user end.
- After removing a product CUSIP from the field "Hide Product CUSIP IDs", it starts showing on new Activity creation page.
- From the Sales Demo site, if the user submits an application that is hidden using SSO, user can fill and submit that application.
- When user proceeds to start a new application from the homepage, hidden application products are not listed on new application page.