iConnect 147808 Auto-Submit When Signatures are Complete

Project Overview

This project's purpose is to give the ability to automatically submit after the signatures are complete for an application, and optionally notify the agent by email when this happens.

Features/Requirements

- Role code option to allow for the automatic submission of an application as defined within this document.
  - Role code option will be called "Enable Auto Submit".
- Data Item to override the Role code option.
  - "FLI_AUTO_SUBMIT" will be the data item ID.
  - If set to "true", the application will automatically submit as defined.
  - If set to "false", the application will not be automatically submitted.
  - If blank or not present, the application will rely on whether the role code/group option is set or not, in order to determine its functionality.
- Automatically submit an application when "Enable Auto Submit" group option is enabled and:
  - All signatures are complete for the application, and Pre-Submit (Manual) Review is not available for the application.
  - If e-sign is declined and Pre-Submit (Manual) Review is not available.
  - If all signatures are completed via Client Fill & Sign and Pre-Submit (Manual) Review is not available.
  - If Pre-Submit (Manual) Review is available and is declined.
  - If Pre-Submit (Manual) Review is available and is skipped because the "FLI_REQUIREMANUALREVIEW" data item flag is set to "false" (per iConnect 173296).
- Role code option to allow for email notification to the agent when an automatic submission has taken place.
  - Role code option will be called "Enable Auto Submit Email Notification".
- New email template for the automatic submission email notification called "Auto Submit Email".

Admin Changes

- New Role Code/Group option (on the Groups page) under the "App Only" tab: Enable Auto Submit
- New Role Code/Group option (on the Groups page) under the "App Only" tab: Enable Auto Submit Email Notification
- New email template for the automatic submission email notification: "Auto Submit Email"
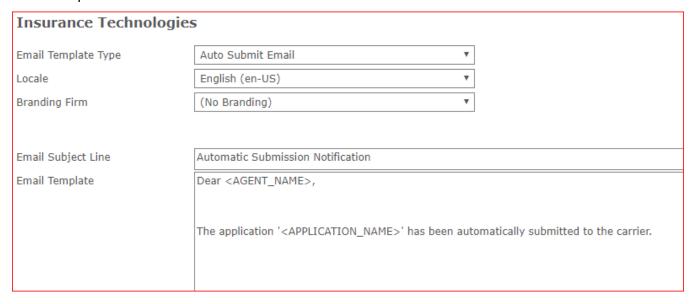
App Changes

- "FLI_AUTO_SUBMIT" data item can now override functionality of auto-submit as defined above in the Features section.
- If auto-submit is enabled, application will now automatically submit as defined above in the Features section.

Integration Changes

N/A

UI Mock Ups

Email template:

New Group options at bottom-right:

| App Only | Admin Only | Review Queue Only | Product Access | Case Access | Review (|

- Enable Submit Email for Agent
- Enable Submit Email for Reviewer
- Disable Signing as Client
- Disable Signing as Agent
- Disable Sign Now
- Disable Send Email Request
- Disable Submit
- Disable Signing Until All Pages Viewed
- Agent Not Required to View All Pages
- Optional Client Email
- Allow PassCode Email
- Auto-Email PassCode
- Enable Quoting
- Disable Log Off
- Enable Custom Submit Page
- Disable Show Annotations

- Allow Not In Good Order Submittals
- Disable Console For Group
- Case Access by Firm ID
- Enable Override SSO
- ☑ Enable User Share
- ☑ Enable Multi-Life
- ☑ Enable Use Agent Email
- Enable Decline E-Sign Email
- Enable Create Benchmarks
- Enable View Benchmarks
- Enable Leave-Behind Email
- Enable CRM Preferences
- Enable Auto Save
- ☑ Enable Auto Submit
- ☑ Enable Auto Submit Email Notification

How to Enable and Use This Feature

- To enable Auto-Submit, one of two ways can be set up:
  - On the desired group role code in the "Groups" page in the Admin tool, select the "Enable Auto Submit" option (under the App Only tab).
  - In the desired product, set up a hidden (doesn't have to be hidden) field called "FLI_AUTO_SUBMIT" with a rule that automatically sets it to "true".
    - Note that setting this data item to "false" will mean that the auto-submit feature will not get used, regardless of the group option.
- To enable Auto-Submit Email Notification:
  - On the desired group role code in the "Groups" page in the Admin tool, select the "Enable Auto Submit Email Notification" option (under the App Only tab).
- To change the Auto-Submit Email template:
  - In the "Email" page, select the "Auto Submit Email" template selection from the "Email Template Type" drop-down menu. The Template can be modified from here.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration	X	• New group option on "Groups" page: Enable Auto Submit • New group option on "Groups" page: Enable Auto Submit Email Notification
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process	X	• Automatic submission takes place from here if enabled & no manual review o Email notification takes place if auto-submit email enabled
- Review Queue		
- Manual Review	X	• Automatic submission takes place from here if enabled o Email notification takes place if auto-submit email enabled
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System	X	New Email template "Auto Submit Email", this email gets sent when automatic submission occurs
FireLight Console		
- Windows		

- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		