INSURANCE TECHNOLOGIES

Provide information to agents with locked cases

FIRELIGHT BASE

FireLight®

Platform

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iConnect 213746 Design Approach - Provide information to agents with locked cases

Project Overview

Carriers would like the ability to notify agents with configurable messages when a case is locked down. Enhancements will include a method for configurable messages to be sent for advanced communication to agents for items such as upcoming rate changes.

Impacts:

Email-new email template

UI: General-Audit report

Admin, Products-New fields added

1 Add Product Level Notification Indicator

A new Product notification indicator labeled, "Allow Product Notifications" has been added to the Admin, Product Configuration, Products. When the indicator is enabled, the user can enter a Start and End date for the notifications and the message content. The message content will be limited to 400 characters. Email and message center communications will be sent to the agent regarding all pending activities for the product indicated for the date range specified. The UI will enable the message if the "Allow Product Notifications" checkbox is not selected but values exist in any of the following fields: Message, Start Date, End Date. Once the values are entered in any of those fields, the selection for "Allow Product Notifications" will be automatically checked. Since this notification lives at the product level, the notification will apply for all locked activities and all distributors who use this product.

The Product Notification indicator can only be updated by a Carrier role for Carrier products. A Distributor role is unable to select/edit these fields for a Carrier product.

When saved, the Product History tab will be updated with the message information, start and end dates.

Acceptance Criteria

- "Allow Product Notifications" indicator is added in Admin, Product Configuration, Products.
- Indicator is available at a Product level; available for view by individual product.

- Selection is made at a Product level and only shown for the Product selected. Selecting the indicator for one product does not impact other products.
- When the indicator is selected, a custom product message can be entered to a maximum of 400 characters. Example 1: "This product is expiring. Please submit all pending activities on or before 9/30/2020." Example 2: "This product contains rates that will no longer be valid as of 10/1/2020."
- When the indicator is selected, dates are required to be entered in the "Message" and "Start" and "End" date fields.
- If a Message and/or dates are not entered, the indicator will not be updated/saved as selected.
- Product notifications can be entered for a future date range.
- The indicator is selected when data is entered in the "Message", "Start" and/or "End Date" fields.
- When the end date has passed for the product notification, the indicator, message and date range will remain in the UI but no emails will be sent. It is basically inactive.
- When a user manually clears selection for the Product Notifications, the "Message", "Start" and "End" fields clear and become disabled.
- Carrier role can select/edit the notification indicator and/or dates for Carrier products.
- Distributor role is unable to select/edit the notification indicator and/or dates for Carrier products.
- Distributor role can select/edit the notification indicator and/or dates for Distributor created products.
- Carrier role is unable to select/edit the notification indicator and/or dates for Distributor created products.
- Product History is updated with Message history, start and end dates.

2 Product Notification Deployment

Products selected to allow notifications will be deployed with the current Product Configuration deployment scope. Any product changes made will also be deployed due to sharing the same deployment scope.

Acceptance Criteria

- Product Configuration deployment scope is used for deployment of Product Notification selections.
- Distributor specific product notifications are considered when deploying products.

3 Create Product Notification Email Template

A new email template will be created for the Product Notifications. One email containing a list of activities by product will be sent per agent, per day, during the designated start and end dates. The email to the agent will contain notifications for all products within the same email.

The email template will contain the following data items: <MESSAGE>

<MESSAGE> will pull from the new "Message" field entered on the Product Page. This is limited to 400 characters. The email notification will include Company Name, Product Name, Activity Name, Application Name and FLI_CONFIRMATION number as part of the dynamic message.

Email Category: Activities

Email Template Type: Product Notification Email

Locale: Available to select for all Locales (dependent on localization settings)

Email Subject Line: Product Notification

Email Template:

Dear <AGENT_NAME>,

<MESSAGE>

Sample Email:

Dear Agent Johnson,

A rate change is effective September 30, 2020. Please submit open activities prior to that date for the current rate(s).

Peak Financial, Financial Security, e-Application, David Foster Financial Security, 6407FSEB20101600649

Peak Financial, Financial Security, e-Application, Karen Foster Financial Security, 6407FSEB20101600650

This product is expiring effective October 15, 2020. Please submit open activities prior to that date.

Peak Financial, Future Horizon, e-Application, Daniel Kim Future Horizon, 6407FSEB20101600672

Peak Financial, Future Horizon, Needs Determination, Sam Perkins, 6407FSEB20101600641

This product has a pending rate change effective October 5, 2020.

ABC Insurance, Savings Plus, e-Application, Jim Morrison Savings Plus, 6407FSEB20101600633

ABC Insurance, Savings Plus, e-Application, Marvin Thompson Application, 6407FSEB20101600657

ABC Insurance, Savings Plus, Needs Determination, Mark Johnson, 6407FSEB20101600634

Acceptance Criteria

- New email template is created under category "Activities" named "Product Notification Email".
- Locale can be selected (availability dependent on organization localization settings).
- Email Subject Line: Product Notification
- Email Template contains necessary data items.
- <MESSAGE> is pulled from new "Message" field on the Product Page.
- Email template contains necessary data reflecting locked activities only for the product(s) containing the notification.
- 1 email per agent with all activities listed, once per day during the date range specified.

4   Include New Product Notification in Nightly Scheduler

Product Notification Emails will be sent to the case owner/agent listed in User Preferences. If there are multiple agents listed on the activity, a copy will be sent to all agents. All products will be listed in a single email for all activities, per agent. The notification email will be sent once per day for locked activities in a pre-submit status using a new nightly schedule (new message process added to current scheduler). FireLight Message Center will also contain a copy of the message emailed for the user.

Acceptance Criteria

- Nightly scheduler implemented/updated for Product Notification emails and message center notifications.
- One email will be sent per day, per agent, listing all locked cases in a pre-submit status for all products selected for notification, regardless of activity.
- One message is added to the FireLight Message Center for the agent per day, per agent, listing all locked cases in a pre-submit status for all products selected for notification, regardless of activity.

5   Audit for Product Notification

Emails and Message Center notifications for the Product Notification will be added to the Audit report for the activity.

Example wording:

"A Product Notification email was sent by the Back Office to 'Joe Agent' at address 'joe@insurancetechnologies.com'. View History "

The audit history will reflect the product notification for each individual activity. Example: Product notification email contains 6 activities with product notifications. The audit history will be updated for each of the 6 activities to include the product notification email was sent.

Acceptance Criteria

- Audit report for the activity includes an entry for Product Notification email sent.
- Audit report for the activity includes an entry for Message Center Notifications.
- Audit history contains an entry regarding the Product Notification email sent for each individual activity when there are multiple in a single email. Example: 6 activities are included in the single product notification email; each activity audit shows the entry for the email sent.

6   Add Message Indicator on Recent Activities and All Activities

When a product notification has been sent for an activity, the agent can be notified of the activity by receiving a message through the message center. This will be displayed by the number displayed on the message center envelope in the eApp (functionality we have today), and also adding a message center icon with an indicator (a plus sign on the envelope) next to the activity in the Recent Activity window and the All Activities page. This will show up only when a product notification is ready for review.

If this envelope is selected, it will display the message immediately. Once the user exits the message, the envelope will still show next to the activity, but will not display the indicator until a new notification is sent.

This icon can be accessed by the Recent Activity or All Activities page and is clickable through both pages as well. Hover text will be added to the Recent Activity and All Activities in order to instruct the agent that they can click on the icon to receive the message. The message should be "Click envelope icon to review message".

Unread:

Read:

All Activities Unread:

All Activities Read:

While the agent will receive a single email with all product notification messages for all activities per day, the message center will contain individual messages per activity; each message in the message center will display only the message content from the product notification for the individual activity. This will differ from the email message containing all products and activities.

Example of message center message for individual activity:

"Solutions Plus has a rate change effective October 30, 2020. Please take necessary action prior to that date."

Acceptance Criteria

- When a product level notification is sent, a message center icon with indicator will display next to the activity.
- Once message is accessed, the indicator (plus sign) will disappear, but the envelope will still be visible.
- Upon selecting the message center icon either on the Recent Activity or All Activity pages, it will direct the user into the message.
- Hover text will be added to the recent activity and all activities that instructs the agent to select the icon to read the message. The message should appear as "Click envelope icon to review message".
- Individual activity messages are displayed when the user selects the Message Center. Each activity listed in the daily email will contain a message related specifically to the individual activity. The message center will display the dynamic product notification message.
- The Product Notification Message matches what is displayed in on Products page.
- When "Send Message Center Emails" is selected in User Preferences, the product notification email will be sent twice; once in the nightly scheduler for the product notification process and another for the message center email selection. If this is not desired, the user may update the "Send Message Center Emails" in their User Preferences.

7 Product Notification Visible for Activity

After a Product Notification message has been sent, the user will have the option to view the message when opening the locked activity in FireLight. The message displayed will pertain to the individual activity and will not contain information that is irrelevant to the activity itself.

Example: The Product Notification email sent in the nightly schedule may contain 6 policies. The message will only display the information related to the individual activity like the message center and audit history.

Wording for Message will be the dynamic Product Notification Message. Example:

"Solutions Plus has a rate change effective October 30, 2020. Please take necessary action prior to that date."

If multiple notifications need to be presented to the user for the activity, the Product Notification Message will be displayed in such a way that it is not hidden. Example: Product Notification Message and Pending Request dialog boxes need to be displayed. The Product Notification Message would display, as well as the Pending Request dialog. Each message window will allow for individual closure.

Acceptance Criteria

- When opening the locked activity in FireLight, the user will have the ability to view the Product Notification message sent.
- Message contains Product Notification information related to the individual activity only.
- Message contains dynamic Product Notification Message.
- Product Notification Message matches what is displayed on the Products page.
- When multiple message boxes need to display, the Product Notification message is displayed in a way where it is not hidden. Example: Product Notification and Pending Request dialog on the same activity; the Product Notification would be displayed on the page with the Pending Request. The user can close each dialog message box individually.