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Add 1035YP Ceding Carriers Fax Number into a Tag

## **FIRELIGHT BASE**

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Platform

**ADD 1035YP CEDING CARRIERS FAX NUMBER INTO A TAG**

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**Insurance Technologies, LLC**

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# iConnect 254396 Design Approach – Add 1035YP Ceding Carriers Fax Number into a Tag

## Project Overview

With this enhancement, the Fax number field for the Ceding Carriers from the third party webservice Cooperative Technologies 1035 Yellow Pages will be mapped in Firelight. This will be the fax number the transfer paperwork is submitted to for replacements.

### Impacts:

Changes will be made to third party webservice from Cooperative Technologies 1035 Yellow Pages to map below tag for ceding carriers fax number.

- Replacement\_Company\_Fax\_PhoneNumber

## 1 Map Ceding Carrier Fax Number into 1035YP

This feature will retrieve the ceding carrier fax number field from third party API from Cooperative Technologies 1035 Yellow Pages and map with below common tag in FireLight.

- Replacement\_Company\_Fax\_PhoneNumber

When a custom action button is used with Action Type as "CRM" and Data Group as "1035 Exchange Ceding Company", it calls ceding carriers contact info from Cooperative Technologies webservice. The above tag will be used to map the ceding company fax number field retrieved from the web service.

The mock-up below shows an example how the contact info is used in a form/wizard.

**Text Box Properties**

**Common Tag Name**

Replacement\_Company\_Fax\_PhoneNumber

**Text**

Fax Number

**Width**

2

**Mobile Width**

Enter a Value

**Error Placement**

Default

**Class Name**

Enter a Value

**Placeholder Text**

Enter a Value

**Help Text**

Enter a Value

**Input Type**

None

**Text Mask**

Phone ((999) 999-9999)

**SSN Format**

None

**Data Group**

1035 Exchange Ceding Company 1

**Data Group Property**

Fax

**Maximum Length**

100

CANCEL
OK

Field Properties

Field Name:

Replacement\_Company\_Fax\_Ph

Common Tag Name:

Replacement\_Company\_Fa... ▾

Top, Left:

647

309

Width, Height:

237

18

Tab Index:

0

Font Size:

0

Font Family:

▾

Font Color:

▾

Text Alignment:

▾

Background:

▾

Input Type:

▾

Max Length:

Soft Limit:

Placeholder Text:

Help Text:

Error Placement:

Default ▾

Protection:

None ▾

Mask:

None ▾

SSN Format:

None ▾

Data Group:

1035 Exchange Ceding Comp ▾

Data Group Property:

Fax ▾

Global Scope:

☒

Multi Line:

☐

Exclude from PDF:

☐

Read Only:

☐

Office Use Only:

☐

Is Password:

☐

Z Order:

Bring to Front

Send to Back

Update

Close

### Replacement Details

Surrendering Company Lookup

Surrendering Company Name Hennessy Funds		Surrendering Company Policy / Contract Number		
Street 1 Attn: c/o USBGFS 615 E Michigan St Fl 3		Street 2		
City Milwaukee	State WI	Zip Code 53202-5210	Phone Number (800) 261-6950	Fax Number
Type of Transfer/Replacement	Surrendering Plan Type	Surrendering Product Type		

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### Surrendering Company Lookup

Surrendering Company Location ID	
Surrendering Company Universal LocationID	
Surrendering Company Name	
Surrendering Company Policy / Contract Number	
Address Street 1	
Address Street 2	
CITY	Milwaukee
STATE	Wisconsin
ZIP Code	
Phone Number	
Fax Number	

***Acceptance Criteria***

- When an application uses a custom action button to retrieve the ceding carrier fax number, it is placed into the tag "Replacement\_Company\_Fax\_PhoneNumber"; fax number value is visible on the application.