INSURANCE TECHNOLOGIES

Add support for state specific quote product documents

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Platform

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iConnect 240184 Design Approach - Add support for state specific quote product documents

Project Overview

Carriers need the ability to show state specific documents with the annuity quotes, such as a product guide.

1 Add state specific quote documents in the Product Repository

Carriers need to be able to upload state-specific documents for quote products, such as a different product guide for Florida and New York and then another product guide for the remaining states.
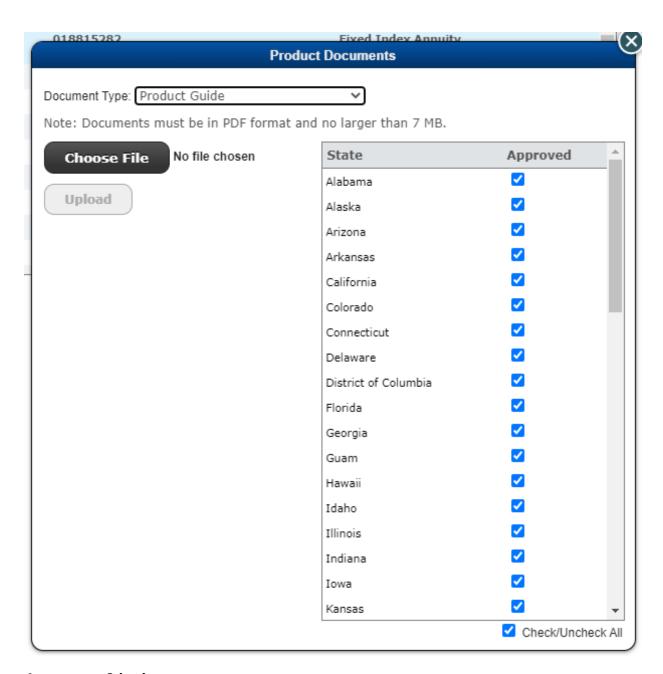
Note: If a document type needs to be replaced, it must first be deleted, then uploaded (no change to current logic).

Add the State selection list to the quote product documents dialog.

018815282   Fixed Index Annuity

Product Documents

Document Type: [Product Guide ⌄]

Note: Documents must be in PDF format and no larger than 7 MB.

Choose File   No file chosen

Upload

State	Approved
Alabama	☑
Alaska	☑
Arizona	☑
Arkansas	☑
California	☑
Colorado	☑
Connecticut	☑
Delaware	☑
District of Columbia	☑
Florida	☑
Georgia	☑
Guam	☑
Hawaii	☑
Idaho	☑
Illinois	☑
Indiana	☑
Iowa	☑
Kansas	☑

☑ Check/Uncheck All

Acceptance Criteria

- State selection list appears in the quote product documents dialog.
- All states are selected by default.
- Applies to Annuity only since Life is being replaced with IXN quotes.
- Allow the same document type, such as a product guide, to be uploaded for different states.
- Add logic for duplicate document types in one state - e.g. duplicate product guides for NY not allowed.
- Do not allow document upload when no states are selected.
- If a document type needs to be replaced, it must first be deleted, then uploaded again.

2 Display state specific quote documents

Display the quote product documents selected in the Admin Product Repository Product Documents dialog based on the selected jurisdictions in the quote wizard.

Acceptance Criteria

- Display the applicable product documents based on the states selected in the Admin Product Repository Product Documents dialog and the selected jurisdiction in the quote wizard.
- Verify documents appear for an uploaded document with a single selected state, such as Product Guide in New York.
- Verify documents appear for an uploaded document with multiple selected states, such as a Product Guide in Alabama, Colorado, and Idaho.
- Applies to Annuity only since Life is being replaced with IXN quotes.
- Verify duplicate document types in one state when uploaded in different state sets. For example, two product guides are uploaded for two different state sets and Arizona is in both. Show both Product Guide links on the quote page.
  - For example, state set one uploads Product Guide A in Arizona, California, and Maine. State set two uploads Product Guide B in Alaska, Arizona, and Delaware. In this example, there will be two Product Guide links on the quote page for Arizona.