

## **Agent Signing Order**

# **FIRELIGHT BASE**



**AGENT SIGNING ORDER** 

Document Version: 1.1

Published: January 14, 2022



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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



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# iConnect 253979 Design Approach - Agent Signing Order

#### **Project Overview**

In this Enhancement, we will want to move the already existing Agent Signing Order to the Groups Tab instead of having it on the Organizational Settings in the Admin Tool. This enhancement will allow businesses to utilize the signing order in a more in-depth way, as it will allow different signing orders for different role codes.

Impacts -

Groups Tab - Agent Signing Order will be added to the App tab under Signing: General. This checkbox and signing order setting will be enabled for all role codes, so no changes should occur for any clients that have this setting already enabled within the organization setting

## 1 Move the Agent Signing Order to the Groups Tab

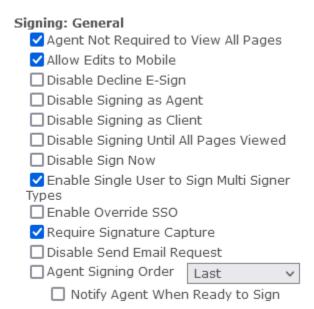
We will want to move the already existing Agent Signing Order from the Organization settings tab to the Groups Tab under the App tab. This will need to be moved under the subtitle "Signing: General" and will be enabled or disabled by a checkbox. When the checkbox is clicked, the dropdown next to the checkbox will be enabled, and the user can choose which order the agent will sign (already existing functionality). If the checkbox is not checked, the agent sign will be set to default





Signing: General		
Agent Not Required to View All Pages		
✓ Allow Edits to Mobile		
☐ Disable Decline E-Sign		
Disable Signing as Agent		
Disable Signing as Client		
Disable Signing Until All Pages Viewed		
☐ Disable Sign Now		
Enable Single User to Sign Multi Signer		
Types		
☐ Enable Override SSO		
Require Signature Capture		
☐ Disable Send Email Request		
Agent Signing Order Last v		

When Last is chosen by Agent Signing Order, another statement will show: Notify Agent when ready to sign which has the option of being checked.



### Acceptance Criteria





- Agent Signing Order will be listed under the "Signing: General" subtitle in the Apps Tab of the Groups Tab in the Admin Tool
- When the Agent Sign Order is clicked, the dropdown will enable, allowing the user to choose the signing order of the agent.
- When the Agent Signing Order is unchecked, the dropdown will be disabled
- The Agent Signing order functionality already exists, and any change to this functionality is out of scope for this project
- WCAG guidelines still apply
- This change will be applied for REACT (Embedded Esign) as well as Legacy