

---

Generate Link Without Email Functionality

# FIRELIGHT BASE

---



Platform

**GENERATE LINK WITHOUT EMAIL FUNCTIONALITY**

**Document Version: 1.0**

**Published: Oct 11, 2022**

**Insurance Technologies, LLC**

Copyright © 2022 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight® and FireLight® are registered or unregistered trademarks of Insurance Technologies, LLC (IT) in the USA and/or other countries.

ACORD, ACORD ObjX, ACORD OLifE, AL3, ACORD Advantage, ACORD XML, and "Association for Cooperative Operations Research and Development" are registered or unregistered trademarks of ACORD Corporation in the USA and/or other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, Windows, and other Microsoft names and logos are either registered or unregistered trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

All other trademarks are the property of their respective owners.

The information contained in this document is current as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, Insurance Technologies, LLC cannot guarantee the accuracy of any information presented after the date of publication.

INSURANCE TECHNOLOGIES, LLC MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT AND HEREBY DISCLAIMS ANY AND ALL SUCH WARRANTIES.

The material contained in this document is considered confidential and the intellectual property of Insurance Technologies, LLC. The recipient is given access to this material on the condition that the recipient (1) will keep the information confidential at all times, and (2) will not copy or modify or share the materials, except as expressly authorized by Insurance Technologies, LLC. The recipient should limit its disclosure of the information and materials only to its employees who have a clear business purpose and need to receive such information and materials and who are bound by confidentiality obligations to the recipient that are at least as protective of such information and materials as those contained herein.

**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](mailto:info@insurancetechnologies.com)

Website: <http://www.insurancetechnologies.com>

## Table of Contents

iConnect 235394 Design Approach – Generate Link Without Email Functionality .....	4
1     Add Generate Link Without Email button for Client Fill and Sign .....	4

# iConnect 235394 Design Approach – Generate Link Without Email Functionality

## Project Overview

The functionality for Generate Link Without Email has shown inconsistency across activities. We will adjust the system differences and close the gaps on Generate Link Without Email, so the functionality is consistently available and displaying expected outcomes.

This enhancement will provide an option to generate 3rd party link without sending an email when request client to fill and sign is sent. Currently, this option is available when request for client fill and remote sign is sent. By adding this option to Client Fill and Sign screen, producers will be able to send custom emails to the clients.

### Impact:

- FLApp: Other Actions > Request Client to Fill & Sign > Generate Link Without Email (new button)

## 1 Add Generate Link Without Email button for Client Fill and Sign

Generate Link Without Email is currently not an available feature in the Request Client to Fill & Sign functionality. Currently, the only option is to send an email request. The selection for Generate Link Without Email will be added as an option for selection in the Request client to Fill & Sign. This will add the same functionality across all client requests and expand the capability for clients to receive a link and passcode for client fill & sign without an email address.

A new button "Generate Link Without Email" will be added to Client Fill & Sign request page. When "Generate Link Without Email" button is clicked, it will generate login link for the primary signer only. When the button is clicked, it will show a dialog to display the URL and passcode that will be used by the primary signer to login to FL to fill and sign the application.

Below mockup displays adding the new button "Generate Link Without Email" on Client Fill & Sign request page.

Request Clients to Complete Filling and Signing Application

Your Name:

Your Email:

Primary ☒ Insured

Name:

Email:

Last 4 Digits of SSN/Government ID:

\* Birth Date:

Mobile Number:

Subject:

Message: 

Dear [CLIENT\_NAME],

Thank you for applying for individual disability insurance from The Standard.


To complete your electronic application, click here: [URL\_LINK]

If a new window doesn't automatically appear, please copy the link and paste it into the address bar of a new browser window.


Please enter your birth date and the last four digits of your Social Security number to log in. You'll be asked to accept the disclosure

The primary signer will receive an email message with instructions to complete the forms and signature.

After the primary signer completes the signature, other signers will receive an email with instructions to complete their signatures.

 Send Email

**Generate Link Without Email**

 Cancel

After the primary signer completes the forms and signatures, other signers on the application will be sent an email with instructions (link and passcode) to complete their signatures. The "Generate Link Without Email" button will only be available for the primary signer.

Below mockup displays the 3rd party fill request link and passcode to displayed on Client Fill & Sign request page.

**Request Clients to Complete Filling and Signing Application**

Your Name:

Your Email:

Primary ☒ **Annuitant**

Name:

Email:

Last 4 Digits of SSN/Government ID:

\* Birth Date:

Primary ☐ **Owner** [Remove]

Name:

Email:

\*Client Authentication via Passcode\*

Subject:

Message: 

Dear <CLIENT\_NAME>,  
 Navigate to Our BuyersGuide:  
<https://www.insurancetechnologies.com>

Thank you for applying for 'iSured Lifetime Income' of FL Access Carrier - Test.

In order to complete your electronic application, please click on the link at the bottom of the email. You will be asked to acknowledge your acceptance of the disclosure terms and

The primary signer will receive an email message with instructions to complete the forms and signature.

After the primary signer completes the signature, other signers will receive an email with instructions to complete their signatures.

Link generated at 9/9/2022 3:11:02 PM.  
 Please inform your recipient(s) to use Passcode **igji8qch**,  
 or enter the last 4 digits of SSN and birth date.

Recipient(s) must use this link:  
**<https://flqanextaz.insurancetechnologies.com/6n3Q>**

**Back To App**

### ***Acceptance Criteria***

- Generate Link Without Email is available option for Request Client to Fill & Sign.
- Generate Link Without Email provides a link for primary signer to access the activity.
- After the primary signer has completed their signature, email request will be sent to other signers to complete their signatures.