iConnect 128213- Email Notification on E-Signature Decline

Workflow Changes

None

Features/Requirements

Email notification sent on decline of the e-signature process. Additional decline signature template in admin which would allow organizations to update with their own process for obtaining wet signatures before application submission. Option within the admin tool would allow the organization to control this email notification at the group level.

Admin Changes

- Option to 'Enable Decline E-Sign Email' in the group settings tab will allow feature to be turned on/off. Default will be set to not send an email on decline the e-sign process.
- New email template added to the Email tab to allow organizations to insert desired text for the instructions on the wet-signature process before application submission in FireLight.

App Changes

- Auto-generated email sent to agent on click of 'Decline E-Signature' button if the option for 'Enable Decline E-Sign Email' has been checked in the group settings of the admin tool for the logged in user's group.

UI Mock Ups

Admin Tool

Option within groups tab to enable the decline e-sign email

Declined E-Signature Email Template- can be modified to include custom instructions for obtaining wet signatures before application submission

Application Portal

Trigger for auto-generated declined e-signature email is the button click on 'Decline E-Signature' in the signatures step of the application workflow.

System Area	Yes	Comment
Admin Tool		
▪ **Form Library**		
▪ **Design Forms**		
▪ **Profile Administration**	x	Option to enable email added to Groups tab- App Only Declined E-Signature template added
▪ **Reports**		
▪ **Deployment**		
FireLight App		
▪ **New Application**		
▪ **Edit Application**		
▪ **Signature Process**		
▪ **Review Queue**		
▪ **Manual Review**		
▪ **User Preferences**		
▪ **Inbound Integration**		
▪ **Outbound Integration**		
▪ **PDF Generation**		
▪ **Other**		
FireLight Console		
▪ **Windows O/S**		
▪ **iOS**		
▪ **Android**		
Other Systems		
▪ **DTCC Integration**		
▪ **Commission netting**		
▪ **Activity Reporting**		

Steps for testing:

1. In the Admin tool Organization tab, check option 'Enable Decline E-Sign Email' to turn on auto-generated email for declined e-signature process.
2. Add custom text to the 'Declined E-Signature Email' template in the Profiles/Email tab of the admin tool.
3. In the Application portal, verify email address is entered in preferences screen or, if using 1228 FireLight entry, an email address is sent in for the agent.
4. Create a new application in the app portal and complete the application.
5. Click continue to transition to the signature step of the application workflow.
6. An auto-generated email will be sent to the agent email with instructions for completing the wet-signature process before electronically submitting the application.