iConnect 165125 Design Approach

Project Overview

The goal of this project is to provide a numeric and currency mask. Previously, these masks were created in a rule. This project allows clients to create a currency/numeric mask for the Organization in the Admin tool.

Features/Requirements

- Specify a prefix.
- Apply a decimal.
- Use period or comma as the thousand separator.

Use Cases / Workflow Changes

Clients can create this mask on the Organizations page in the Admin Tool. Once your mask has been created apply the mask to a textbox field in the Form Designer. Save the form and create a new application with that form.

Admin Changes

Changes to the Admin are to a new mask type for currency/numeric. This mask type is saved at the Organization level along with all of the other masks.

UI Mock Ups

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Organization Name	Insurance Technologies
Organization Type	Carrier
Data Partition	ALL
External Map Code	IT
Shared Key	FireLight#123
Country	USA
DTCC Member ID	00012
Full Settling DTCC Member	☐
Company Rating	AAA+
App Signout URL Type	ThankYou
App Site Signout URL	ThankYou
Support Email	info@go.com
Deployment Notification Email	
Edit Masks Add	None
Default Validation Placement	Right
Submit Reminder Frequency	Never
Agent Signing Order	Last
Signature Fonts	Click to Edit

How to Enable and Use This Feature

To use this feature, navigate to the Organizations page within the admin tool and click the "Add" button next to Edit Masks. Select a mask type of Numeric and customize the mask to meet your requirements. When finished, click the "Add" button to add it to the database. You can now apply that mask to your textbox fields to your forms in the Forms Designer.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms	X	New mask type can be applied to Text box fields
- Profile Administration	X	Organization Page
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application	X	New mask type
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		

- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		