INSURANCE TECHNOLOGIES

Common Tags Organization Setting to Turn On/Off Common Tags July 2.25

FIRELIGHT BASE

FireLight®

Platform

INSURANCETECHNOLOGIES.COM

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1 Common Tags Organization Setting to turn On/Off Common Tags July 2.25

Add an organization level setting to control when the common tags are rolled out for each client. To accomplish this, an organization level flag has been added that will enable or disable common tags to control when common tags are set for data items (synch automatically between a carrier and distributor) and when the common tags are ignored.
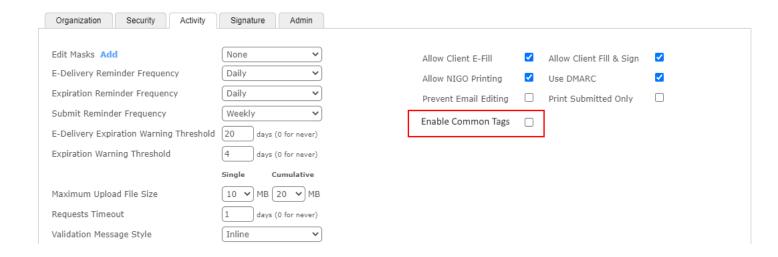
1.1 Org Setting Admin: Add new Organization Setting on the Activity tab to enable/disable common tags

Add a new option that will enable and disable common tags for an organization. ***The default will be unchecked (disabled).***

When a distributor and carrier are active in an activity, if either organization has common tags disabled, then both the carrier and distributor are disabled for the activity. For example, Carrier has common tags enabled and Distributor does not. When Distributor creates an activity with that specific Carrier product, common tags are disabled for that activity and will not synch automatically.

NOTE: *In-flight activities are not updated after they are created. The current common tags setting is stored in the saved activity and used regardless of if it has been updated after the activity is saved.*

1.2   Org Setting App: Update all activity creation entry points to read the new Common Tag Org Setting flag

Update all activity creation entry points to read the new common tag Admin Organization Setting flag. This includes:

1. Activity creation in FireLight

2. Embedded

3. SSO

4. API

5. Activity creation from another activity (e.g., illustration to application)