

## Generate Link Without Email Functionality

# **FIRELIGHT BASE**



**Platform** 

**GENERATE LINK WITHOUT EMAIL FUNCTIONALITY** 

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# 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

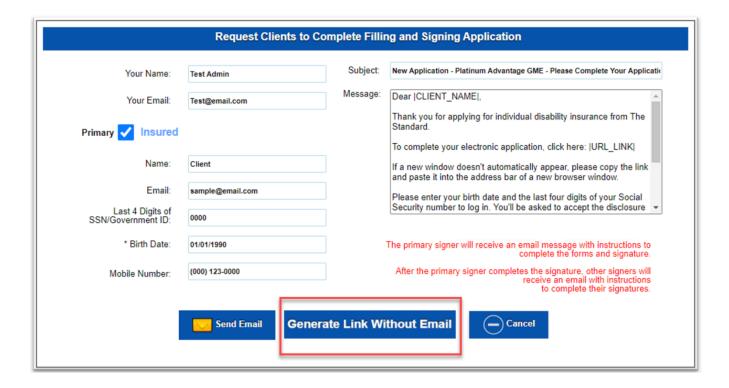
Generate Link Without Email is currently not an available feature in the Request Client to Fill & Sign functionality. Currently, the only option is to send an email request. The selection for Generate Link Without Email will be added as an option for selection in the Request client to Fill & Sign. This 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.





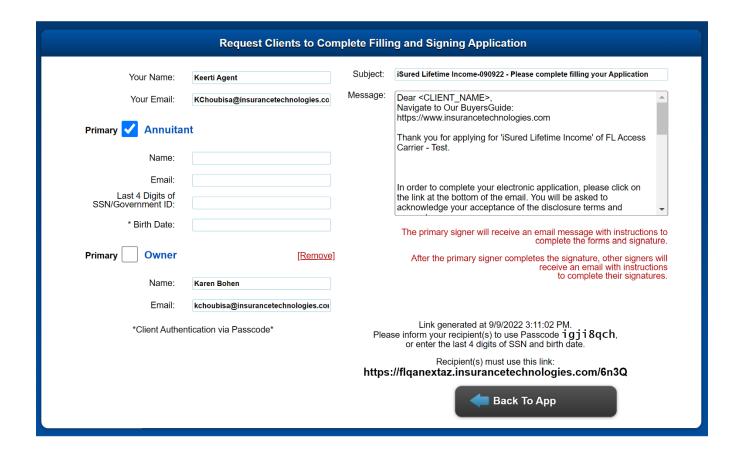


After the primary signer completes the forms and signatures, other signers on the application will be sent an email with instructions (link and passcode) to complete their signatures. The "Generate Link Without Email" button will only be available for the primary signer.

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







#### 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.