INSURANCE TECHNOLOGIES

Managing Multiple Sales Agreements

FIRELIGHT BASE

FireLight®

Platform

MANAGING MULTIPLE SALES AGREEMENTS

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iConnect 252604 Design Approach - Managing Multiple Sales Agreements

Project Overview

The enhancements in this feature will only apply to the Carrier Sales Agreements.

With this feature, users of FireLight will be able to make updates to multiple Sales Agreements at one time. They will be able to select multiple orgs at one time and have the changes made (i.e., states, etc.) applied to all of the selected orgs. It should be noted that this feature will not allow for granular level updates (e.g., only update the states).

Impacts: FL Admin -> Product Config -> Sales Agreement

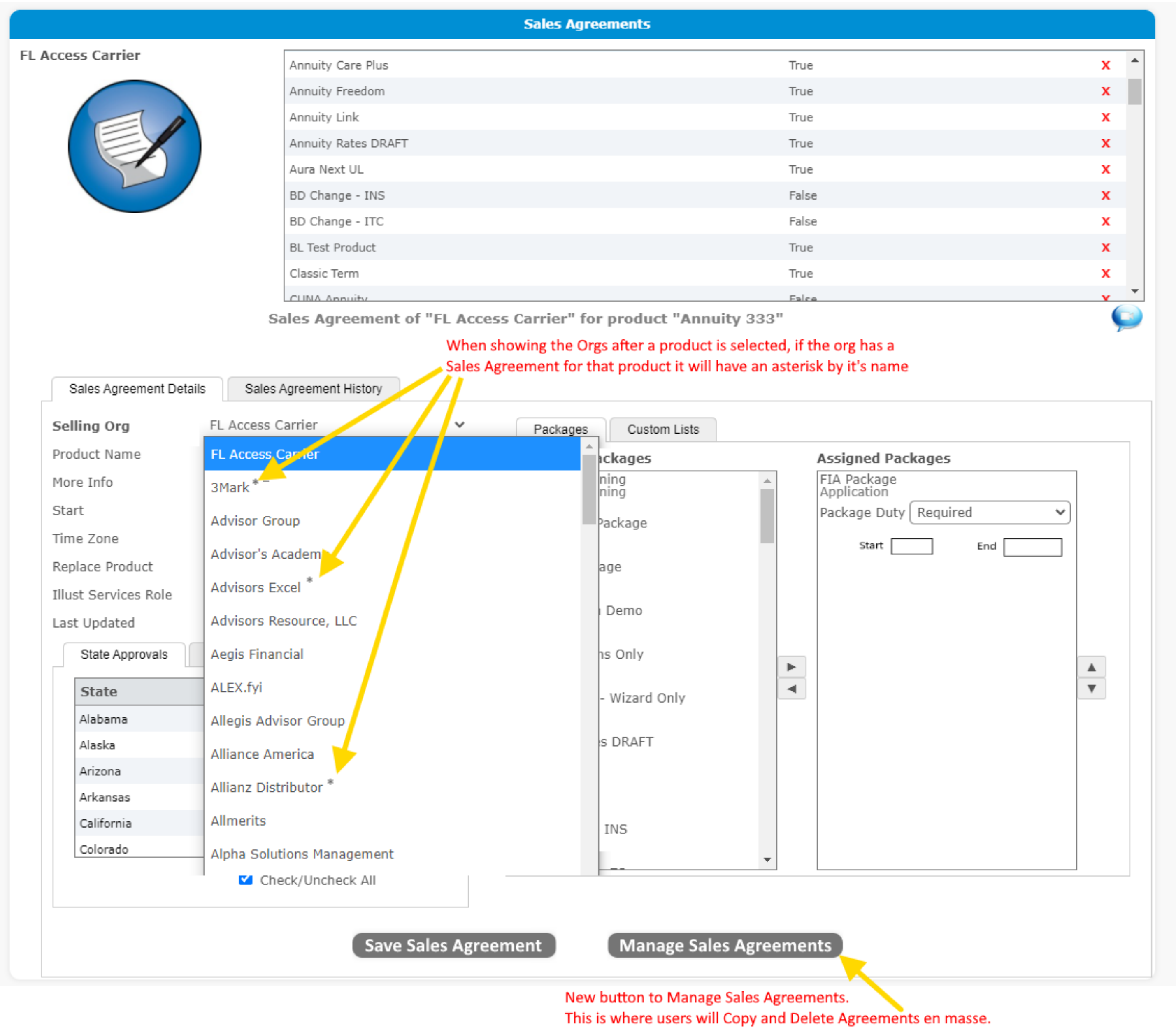
1 Update Sales Agreement UI

Changes will be made to the Sales Agreement UI to allow selection of a selling org without the product reverting focus, the ability to determine if the selling org has an active selling agreement and the creation of a new button for copying sales agreements.

The following updates will be made:

- Selecting a Selling Org:
    - When selecting a Selling Org, the selected product will not change. Currently if you select a product (i.e. Annuity 222) and then change the Selling Org, the selected product reverts back to the first in the list. This change will allow the user to select the product and change the Selling Org without the need to select the product again. Agreement (yes / no) should still be updated to reflect if there are agreements for the org.
- Displaying Selling Orgs:
    - When displaying the names in the Selling Org dropdown list, if the org has an active Selling Agreement for the selected product, it will have an asterisk by it's name (see image below). This enhancement will provide greater visibility to the user for ease of use.
- New Text Under Selling Org:
    - New text under the Selling Org dropdown will be displayed to show that an asterisk (*) by an Org will denote that it has an active Sales Agreement for the product. The text will read: "* By Org Will Indicate an active Sales Agreement"

- New Buttons:
    - A new button will be added to the right of the "Save Sales Agreement" button at the bottom of the UI. It will be labeled "Manage Sales Agreements". When the new "Manage Sales Agreements" button is clicked, it will launch the Manage Sales Agreements modal dialog. If the Sales Agreement is either new, or changes have been made, the "Manage Sales Agreements" button will be disabled until the changes have been saved. The security permissions for this button will follow the same security permissions as the Save Sales Agreement button
- The two buttons (Save Sales Agreement and Manage Sales Agreements will be centered horizontally at the bottom of the screen (see image below, and attached).
- After a product is selected, it will remain selected when the selected item in the Selling Org dropdown list changes, and the agreement status in the top of the screen will be updated to reflect the appropriate Agreement status for the org and products



Impacts: FL Admin -> Product Config -> Sales Agreements

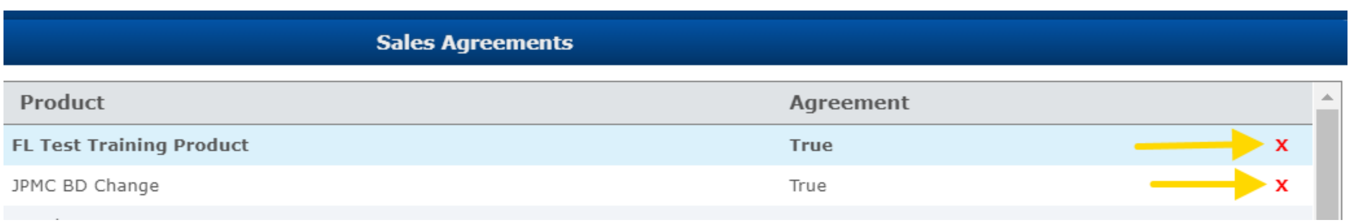
Acceptance Criteria

- After a product is selected, it will remain selected when the selected item in the Selling Org dropdown list changes, and the agreement status in the top of the screen will be updated to reflect the appropriate Agreement status for the org and products
- After a product is selected, the names of the orgs in the Selling Orgs dropdown list will have an asterisk by them if they have an agreement for that product.
- The new button will be added next to the "Save Sales Agreement" button, and the buttons will be centered horizontally at the bottom of the screen.
- To the right of the "Save Sales Agreement" button at the bottom of the screen, a new button will be created. It will be labeled "Manage Sales Agreements. When this button is clicked, it will launch a new modal dialog

2 Manage Sales Agreement for multiple orgs

FireLight will now allow users to copy and delete Sales Agreements for a single or multiple organizations at once, as well as save batches of organizations. When the new "Manage Sales Agreements" button is selected, a modal dialog box will be presented to the user.

FireLight currently only allows users to delete Sales Agreements one at a time. This is accomplished by clicking the red x on the right hand side of the Product section on the main Sales Agreement page. This functionality will not be changed.



Mange Sales Agreements Modal Dialog Box:

The Manage Sales Agreements Modal Dialog Box will be comprised of the following:

- A dropdown list for the Saved Batches (will change to a TextBox when renaming a batch)
- A ListBox for the Selling Orgs. It will be populated with all of the available organizations in the Selling Org dropdown list on the main Sales Agreements screen, as well as an option to check/uncheck all at the top. If an organization has a Sales Agreement for the selected product, it will have an asterisk by it's name. On initial load, no items in the list will be selected.
- Four Buttons: Copy Agreement, Delete Agreements, Save Batch, and Delete Batch

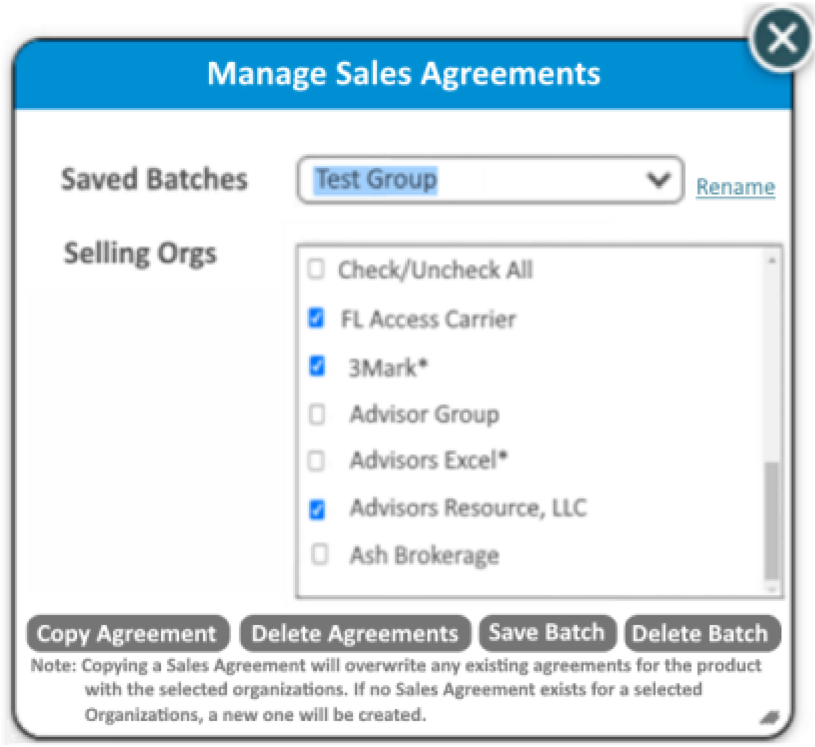
- A small note under the button to inform the user that copying to an org will overwrite an existing Sales Agreement if it has one for that product and will create a new Sales Agreement if an org doesn't have one for that product.

Saved Batches:

The dropdown list for Saved Batches will default to an empty batch, with the selected text "(New)" being displayed when first launched. It will be populated with a list of the user's Saved Batches. The selected text will be editable by the user so they can give a batch a name and save it.

Saved Batch selected:

When a user selects a Saved Batch, the selected text for the Saved Batch dropdown list will change to the selected batch's name. Additionally, the ListBox for Selling Orgs will be updated, with the organizations associated with that batch selected. If an organization has an active Sales Agreement for the selected product, it will have an asterisk by its name. It will be possible for an Org to be saved to multiple batches.



<u>Renaming a Batch:</u>

When a user wishes to rename a batch (either because it is new, or updating an existing batch name), the will click on the Rename link by the Saved Batches dropdown list. The dropdown list will be converted to a textbox where the user can type in a new name, and the text of the Rename like will change to "Cancel". If it is a new batch (noted by the selected text of the dropdown list being "(New)", the text box will be blank. If it is an update to an existing batch, the TextBox will be populated with the current name of the batch, and the text will be selected. If the user clicks Cancel, the TextBox will be hidden, and the Saved Batches dropdown list will again be displayed as it was before they clicked the "Rename" link. After the user updates the name in the textbox, they will click the Save Batch button. If the TextBox is empty, the user will be prompted for a name. This will save the batch. If it is updating an existing batch, the name for the selected batch in the dropdown list will be updated. If it is a new batch, a new entry will be created. The saved batches dropdown list will then be displayed again with the newly created / updated batch selected.

Four Buttons:

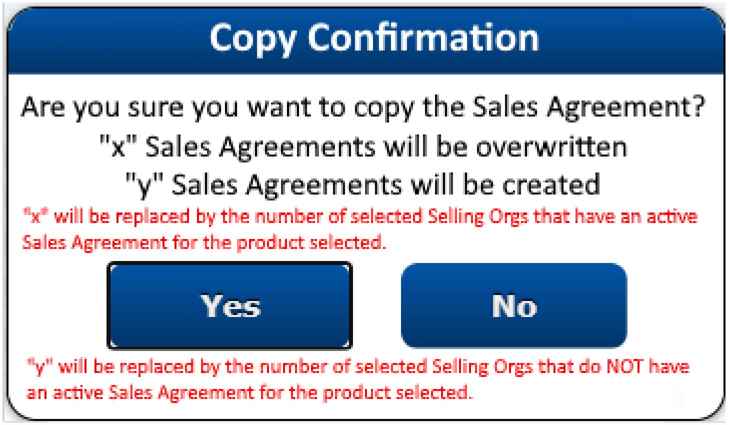
The four buttons will be at the bottom of the screen, just above the note about overwriting Sales Agreements. They will be:

- Copy Agreement - this button will launch a confirmation box (see section below for description and mockups). Users will be able to copy sales agreements to the selected orgs without saving the selected orgs to a batch.
- Delete Sales Agreements - this button will launch a confirmation box (see section below for description and mockups). Users will be able to delete sales agreements from the selected orgs without saving the selected orgs to a batch.
- Save Batch - this button will update the Batch with the name in the selected text of the Saved Batches dropdown list with the selected values from the Selling Orgs ListBox. If a Batch is found, it will be updated. If the selected text still has the initial value "(New)", the user will be prompted for a name (see image below), and the user will need to rename the batch. It will be possible for an Org to be saved to multiple batches.

- Delete Batch - will remove the Batch and organization associations for the batch specified in the selected text of the Saved Batches dropdown list, and the Saved Batches dropdown list will be refreshed. The Selling Orgs ListBox will be refreshed, and no items will be selected.

Copy Confirmation:

When a user clicks on the Copy Agreement button, a new confirmation box will be displayed. It will ask the user if they are sure they want to copy the Sales Agreement, and that "x" Sales Agreements will be overwritten and "y" Sales Agreements will be created. "x" will be replaced with the number of selected Selling Orgs that have an active Sales Agreement for the selected product. "y" will be replaced with the number of selected Selling Orgs that do NOT have an active Sales Agreement for the selected product. If the user confirms, the Sales Agreement will be copied to the selected Selling Orgs. If an organization already has a Sales Agreement for the product selected, it will overwrite it. If an organization does not yet have a Sales Agreement for the product selected, it will create one. Upon success, the Manage Agreements box will go away, and the user will be shown a message indicating the number of Sales agreements that were copied. This message will be displayed on the bottom right corner of the main Sales Agreement screen. The dropdown list for the Selling Org on the main Sales Agreement screen will also be refreshed so the organizations with the new Sales Agreement for the product will have an asterisk by their name. If there is an error copying the Sales Agreement, the user will be shown a message indicating what the error was, and the Manage Agreements box will still be visible.



Delete Confirmation:

When a user clicks on the Delete Agreements button, a new confirmation box will be displayed. It will ask the user if they are sure they want to delete x number of Sales Agreements, where x is the number of selected orgs that have an active Sales Agreement for the selected product. If the user confirms, the Sales Agreements for the selected orgs and product will be deleted. Upon success, the Delete Sales Agreements box will go away, and the user will be shown a message indicating the number of Sales Agreements that were deleted. This message will be displayed on the bottom right corner of the main Sales Agreement screen. The dropdown list for the Selling Org on the main Sales Agreement screen will then be refreshed so the organizations with a deleted Sales Agreement for the product will no longer have an asterisk by their name. If there is an error deleting a Sales Agreement, the user will be shown a message indicating what the error was, and the Manage Sales Agreements box will still be visible.

Overwriting / Creating Note

There will be a small notification/footnote to the user under the buttons on the dialog window regarding the overwriting of existing Sales Agreements and the creation of new ones. The text shall be: "Note: Copying a Sales Agreement will overwrite any existing agreements for the product with the selected organizations. If no Sales Agreement exists for a selected organization, a new one will be created."

Impacts: FL Admin -> Product Config -> Sales Agreements

Acceptance Criteria

- FireLight will allow users to copy a Sales Agreement to a single, or multiple organizations at once.
- Users will be allowed to save Batches of organizations
- When a user clicks the Manage Sales Agreements button, a modal dialog box will be displayed, and will be comprised of:
- A dropdown list for the Saved Batches with a link to Rename next to it. When the Rename link is clicked, the dropdown list will be converted to a Textbox
- A ListBox for the Selling Orgs. It will be populated with all of the available organizations in the Selling Org dropdown list on the main Sales Agreements screen, as well as an option to check/uncheck all at the top. If an organization has an active Sales Agreement for the selected product, it will have an asterisk by its name. On initial load, no items in the list will be selected.
- Four Buttons: Copy Agreement, Delete Sales Agreements, Save Batch, and Delete Batch
- A small note under the button to inform the user that copying to an org will overwrite an existing Sales Agreement if it has one for that product, and will create a new Sales Agreement in a org doesn't have one for that product.
- When first launched, the Saved Batches dropdown list will default to an empty batch, with the selected text being "(New)", and will be populated with a list of the user's Saved Batches . The selected text will be editable so the user can give a batch a name and save it. It will be possible for an Org to be saved to multiple batches.
- Selling Orgs will be a ListBox.
- It will have a "Check All/Uncheck All" option at the top and will be populated with all of the available organizations in the Selling Org dropdown list on the main Sales Agreement screen.
- If an active Sales Agreement for the selected product exists with an organization, it will have an asterisk by its name in the ListBox.
- When a user selects a Saved Batch, the following will occur:
- The selected text for the Saved Batches dropdown list will change to the selected batch's name.
- The ListBox for Selling Orgs will be updated, with the organizations associated with the batch selected.
- If an organization has an active Sales Agreement for the selected product, it will have an asterisk by its name.
- When a user Clicks the Rename link for the Saved Batches, the following will occur:
- The rename link will change from "Rename" to "Cancel". If the user clicks cancel, the TextBox is hidden again, and the dropdown list is shown again.
- The Saved Batches dropdown list will be hidden, and in its place a textbox will be displayed. If the selected text of the dropdown list matches the initial selected value "(New)", the TextBox

will be empty. If a saved batch has been loaded, the TextBox will be populated with the name of the batch, with the text selected

- When the user clicks the Save Batch button, the batch name will be updated. If it is a new batch, it will be created. If the TextBox is empty, the user will be prompted to enter a batch name. After the batch is updated/created, the dropdown list will be shown with the selected value being new/updated name
- The four buttons will be at the bottom of the screen, just above the note about overwriting of existing Sales Agreements, and will be defined as follows:
- Copy Agreement - When a user clicks on the Copy Agreement button, a new confirmation box will be displayed. It will ask the user if they are sure they want to copy the Sales Agreement, and that "x" Sales Agreements will be overwritten and "y" Sales Agreements will be created. "x" will be replaced with the number of selected Selling Orgs that have an active Sales Agreement for the selected product. "y" will be replaced with the number of selected Selling Orgs that do NOT have an active Sales Agreement for the selected product. If the user confirms, the Sales Agreement will be copied to the selected Selling Orgs. If an organization already has a Sales Agreement for the product selected, it will overwrite it. If an organization does not yet have a Sales Agreement for the product selected, it will create one. Upon success, the Manage Agreements box will go away, and the user will be shown a message indicating the number of Sales agreements that were copied. This message will be displayed on the bottom right corner of the main Sales Agreement screen. The dropdown list for the Selling Org on the main Sales Agreement screen will also be refreshed so the organizations with the new Sales Agreement for the product will have an asterisk by their name. If there is an error copying the Sales Agreement, the user will be shown a message indicating what the error was, and the Manage Agreements box will still be visible. Users will be able to copy sales agreements to the selected orgs without saving the selected orgs to a batch.
- Delete Sales Agreements - When a user clicks on the Delete Sales Agreements button, a new confirmation box will be displayed. It will ask the user if they are sure they want to delete x number of Sales Agreements, where x is the number selected. If the user confirms, the Sales Agreements for the selected orgs and product will be deleted. Upon success, the Delete Sales Agreements box will go away, and the user will be shown a message indicating the number of Sales Agreements that were deleted. This message will be located on the bottom right corner of the main Sales Agreement screen. The dropdown list for the Selling Org on the main Sales Agreement screen will then be refreshed so the organizations with a deleted Sales Agreement for the product will no longer have an asterisk by their name. If there is an error deleting a Sales Agreement, the user will be shown a message indicating what the error was, and the Delete Sales Agreements box will still be visible. Users will be able to delete sales agreements from the selected orgs without saving the selected orgs to a batch.
- Save Batch - this button will update the batch with the name in the selected text of the Saved Batches dropdown list with the selected values from the Selling Orgs ListBox. If a batch is

found, it will be updated. If the selected text still has the initial value "(New)", the user will be prompted for a name, and the user will need to click the Rename link. It will be possible for an Org to be saved to multiple batches.

- Delete Batch - will remove the batch and organization associations for the batch specified in the selected text of the Saved Batches dropdown list, and the Saved Batches dropdown list will be refreshed. The Selling Orgs ListBox will also be refreshed, and no items will be selected.
- There will be a note at the bottom of the screen to inform the user that copying this Sales Agreement will overwrite an existing one, or create a new one if needed. The text will be: "Note: Copying a Sales Agreement will overwrite any existing agreements for the product with the selected organizations. If no Sales Agreement exists for a selected organization, a new one will be created."