

## iConnect 155605 Design Approach

### Project Overview

This project will implement email notifications that provide access to the signed application documents after each client signs an application.

### Features/Requirements

If this feature is enabled, each time a client completes the signing ceremony, an email will be sent to the signer, which will include a link to download the application documents with captured signatures. A new email template will be available to customize the message of the email message that is sent.

The final download email notification already contains a link to all signed application documents with all signatures; this functionality will not change.

The agent will receive the final download link with all signatures if the role code option *Enable Submit Email for Agent* is enabled.

### Use Cases / Workflow Changes

N/A

### Admin Changes

**Groups** profile: a new App Only option *Enable Leave-Behind Email* will be added. For role codes that have this option enabled, additional email notifications will be sent after signing.

**Email** profile: a new *Leave-Behind Email* template will be added, which can be customized as needed. The default email template will be:

**Subject:** Print or download your signed documents

**Template:**

Dear <CLIENT\_NAME>,

Thank you for signing the application for '<PRODUCT\_NAME>' of <COMPANY\_NAME>.

To download or print the signed documents, please click on the link at the bottom of the email. You will be asked for your birth date and the last four digits of your Social Security number.

If you have questions, please feel free to contact me.

Sincerely,

<AGENT\_NAME>

To download or print your signed application documents, click on <URL\_LINK>, enter the last 4 digits of your SSN and birth date. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of a new browser window.

### App Changes

Whenever a signature is completed, if the *Leave-Behind Email* option is enabled for the application's owning agent role code, an email notification will be sent to the signer, using the Leave-Behind Email template. Sending of the email message will also be recorded in the application audits.

### Integration Changes

None

### UI Mock Ups

N/A

### How to Enable and Use This Feature

In the Admin tool, enable the Group option *Enable Leave-Behind Email* for the user. This will activate the functionality to send email after each signer signs the application.

### Limitations

1. If the signer does not have an email address, they will not receive the notifications emails.
2. In a distributor environment, email templates and group options are controlled by the distributor.
3. The link to application documents in the leave-behind email will follow the normal expiration policy as configured via the organization Requests Timeout setting. It will not expire when all applications have been captured but will function the same as the link in the final emails (showing all signatures).

### Areas Impacted

System Area	Yes	Comment
<b>Admin Tool</b>		
- Form Library		
- Design Forms		
- Profile Administration		Groups – new App Only option <i>Enable Leave-Behind Email</i>

		Email – new <i>Leave-Behind Email</i> template
- Reports		Audit report will include notification of leave-behind emails sent
- Deployment		
<b>FireLight App</b>		
- New Application		
- Edit Application		Application history will include notification of leave-behind emails that are sent
- Signature Process		Emails sent after each captured signature
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
<b>FireLight Console</b>		
- Windows		
- iOS		
<b>Other Systems</b>		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		