Email Documentation

Client Request Emails	To Name/Email	From Name/Email[1]	CC Address	Template Name	Available Tags[3]

Client fill request[1]	Client Name/Email typed in email fields or pre-filled from mapped dataitems	Default: Session User's Preference Name/ Email [2]
		
		Use Agent: Owning Agent's Preference Name/Email
			If cc Sender in all requests is set in Admin, cc email sent to 'From Email' address	Request Client to Fill Application	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<URL_LINK>`
					`<CLIENT_NAME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					`ApplicationSearchItems`[4]

Client contact agent request from external client fill[1]	'From Name/Email 'used in the client fill request	Client 'To Name/Email' used in client fill request	No cc Sender	No template	N/A- Client generated email

Signature request[1]	Client Name/Email typed in email fields or pre-filled from mapped dataitems	Default: Session User's Preference Name/ Email [2]
		
		Use Agent: Owning Agent's Preference Name/Email
			If cc Sender in all requests is set in Admin, cc email sent to 'From Email' address	Signature Request	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<URL_LINK>`
					`<CLIENT_NAME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					`ApplicationSearchItems`[4]

Signature request completed	'From Name/Email 'used in the signature request	Client 'To Name/Email' used in signature request	No cc Sender	Client Signed and Approved the Application	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<CLIENT_NAME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					`<CITY_NAME>`
					`ApplicationSearchItems`[4]

Client contact agent request from external client sign[1]	'From Name/Email 'used in the signature request	Client 'To Name/Email' used in client fill request	No cc Sender	No template	N/A- Client generated email
Signature declined during external	'From Name/Email 'used in the signature request	Client 'To Name/Email' used in client fill request	No cc Sender	Client Signed and Declined	N/A- Client generated email

signature request				the Application	

Signature declined by agent	Default: Session User's Preference Name/ Email
	
	Use Agent: Owning Agent's Preference Name/Email
	
	If preference email has not been set, org email is used
		Organization name/email	**No cc Sender**	Declined E-Signature	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					`ApplicationSearchItems`[4]

Final email on application submission	All signers not agent: Name/Email entered in client verification screen	'From Name/Email 'used in client fill/signature requests if available, else organization name/address	If cc Sender in all requests is set in Admin, cc email sent to 'From Email' address	Download Completed Application	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					`ApplicationSearchItems`[4]

Batch processing email requests- client fill and signature requests[1]	Pre-filled from mapped dataitems	Default: Session User's Preference Name/ Email [2]
		
		Use Agent: Owning Agent's Preference Name/Email
			No cc Sender	Signature Request	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					`<URL_LINK>`
					`ApplicationSearchItems`[4]

Client fill & Sign request[1]	Client Name/Email typed in email fields or pre-filled from mapped dataitems	Default: Session User's Preference Name/ Email [2]
		
		Use Agent: Owning Agent's Preference Name/Email
			If cc Sender in all requests is set in Admin, cc email sent to 'From Email' address	Signature Request	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<URL_LINK>`
					`<CLIENT_NAME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					`ApplicationSearchItems`[4]

User Share Request	User preference for agent receiving share request	Default: Session User's Preference Name/ Email [2]
		
		Use Agent: Owning Agent's Preference Name/Email
			cc email sent to 'From Email' address	User Share Request	`<AGENT_NAME>`
					`<URL_LINK>`
					`<USERSHARE_NAME>`
					`<DATE_TIME>`
					`<SHARETYPE>`

Accept User Share	User preference Name/Email for owning agent	User preference for agent accepting share request	No cc Sender	Accept User Share	`<AGENT_NAME>`
					`<URL_LINK>`
					`<USERSHARE_NAME>`
					`<DATE_TIME>`
					`<SHARETYPE>`

Reject User Share	User preference Name/Email for owning agent	User preference for agent rejecting share request	No cc Sender	Revoke User Share	`<AGENT_NAME>`
					`<URL_LINK>`
					`<USERSHARE_NAME>`

					`<DATE_TIME>` `<SHARETYPE>`

Client Request Expiration Warning	Client Name/Email used in original request	Default: Session User's Preference Name/ Email [2]
		
		Use Agent: Owning Agent's Preference Name/Email
			If cc Sender in all requests is set in Admin, cc email sent to 'From Email' address	Client Request Expiration Warning	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<URL_LINK>`
					`<CLIENT_NAME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					ApplicationSearchItems[4]

Agent Request Expiration Warning	Agent Name/Email used in original request	Default: Session User's Preference Name/ Email [2]
		
		Use Agent: Owning Agent's Preference Name/Email
			No cc Sender	Agent Request Expiration Warning	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<URL_LINK>`
					`<CLIENT_NAME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					ApplicationSearchItems[4]

Client Request Expiration Notification	Client Name/Email used in original request	Default: Session User's Preference Name/ Email [2]
		
		Use Agent: Owning Agent's Preference Name/Email
			If cc Sender in all requests is set in Admin, cc email sent to 'From Email' address	Client Request Expired	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<URL_LINK>`
					`<CLIENT_NAME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					ApplicationSearchItems[4]

Agent Request Expiration Notification	Agent Name/Email used in original request	Default: Session User's Preference Name/ Email [2]
		
		Use Agent: Owning Agent's Preference Name/Email
			No cc Sender	Agent Request Expired	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<URL_LINK>`
					`<CLIENT_NAME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					ApplicationSearchItems[4]

[1] If email address field can be edited, DMARC logic is automatically applied- From Address replaced by organization email with reply to From Address to avoid email server rejection due to domain mismatch.

[2] May disable preference fields and send in with incoming FireLight request. If template fields are not disabled, may also type in desired name/email.

[3] If replacement tags are being used directly in the app portal template view, pipe enclosure must be used in tag as browsers will not allow direct replacement of brackets. For example, use |PRODUCT_NAME| rather than <PRODUCT_NAME>. Additionally, use of unavailable tags may result in email and other browser view errors.

[4] Requires a database change. Check with your FireLight® project manager.

Review Queue Emails	To Name/Email	From Name/Email	CC Address	Template Name	Available Tags[3]

Manual reviewer requests for application review[1]	Reviewer Name/Email typed in email fields or reviewer Name/Email info saved in session user's preferences	Default: Session User's Preference Name/ Email [2]
		
		Use Agent: Owning Agent's Preference Name/Email
			If cc Sender in all requests is set in Admin, cc email sent to 'From Email' address	Manual Review Queue Request	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<AGENT_NAME>`
					`<REVIEWER_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					ApplicationSearchItems[4]

E-Approval (Manual Review) approve/reject notification	'From Name/Email 'used in request for review	Reviewer 'To Name/Email' used in review request	No cc Sender	Manual Review Queue Approve Message/ Manual Review Queue Decline Message	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					`<CITY_NAME>`
					ApplicationSearchItems[4]

Manual review queue contact agent emails[1]	'From Name/Email 'used in the client fill request	Client 'To Name/Email' used in client fill request	No cc Sender	No template	N/A- Client generated email

Passcode Email	Based on info used in request	Based on info used in request	No cc Sender	Review Request Passcode	`<PASSCODE>`
					`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					ApplicationSearchItems[4]

Application approved/rejected from Review Queue[1]	Owning Agent's Preference Name/Email	Reviewer's Preference Name/Email
		
		If preference not set: Organization name/address
			No cc Sender	Review Queue Approve Message/ Review Queue Reject Message	`<APPLICATION_NAME>`
					`<DATE_TIME>`
					`<AGENT_NAME>`
					`<PRODUCT_NAME>`
					`<PRODUCT_TYPE>`
					`<COMPANY_NAME>`
					`<CITY_NAME>`
					ApplicationSearchItems[4]

Request for additional information from Review Queue[1]	Owning Agent's Preference Name/Email	Reviewer's Preference Name/Email If preference not set:	No cc Sender	No Template	N/A- Reviewer generated email

		Organization name/address			
Batch processing review requests[1]	Pre-filled from mapped dataitems	Default: Session User's Preference Name/ Email [2] Use Agent: Owning Agent's Preference Name/Email	No cc Sender	Batch Review Request	<APPLICATION_NAME> <DATE_TIME> <AGENT_NAME> <PRODUCT_NAME> <PRODUCT_TYPE> <COMPANY_NAME> ApplicationSearchItems[4]
Review Reminder Email[1]	Reviewer Name/Email as typed in original request	Default: Session User's Preference Name/ Email [2] Use Agent: Owning Agent's Preference Name/Email	If cc Sender in all requests is set in Admin, cc email sent to 'From Email' address	No template	N/A- reminder email
Review Auto-Added to Queue	Firm address or review queue email group	Organization name/address	No cc Sender	Review Queue Message	<APPLICATION_NAME> <DATE_TIME> <AGENT_NAME> <PRODUCT_NAME> <PRODUCT_TYPE> <COMPANY_NAME> <QUEUE_NAME> <QUEUE_NUMBER> <AGENT_CODE> <CASE_NAME> ApplicationSearchItems[4]

[1] If email address field can be edited, DMARC logic is automatically applied- From Address replaced by organization email with reply to From Address to avoid email server rejection due to domain mismatch.

[2] May disable preference fields and send in with incoming FireLight request. If template fields are not disabled, may also type in desired name/email.

[3] If replacement tags are being used directly in the app portal template view, pipe enclosure must be used in tag as browsers will not allow direct replacement of brackets. For example, use |PRODUCT_NAME| rather than <PRODUCT_NAME>. Additionally, use of unavailable tags may result in email and other browser view errors.

[4] Requires a database change. Check with your FireLight project manager.