

---

IXN Integration E-Ticket 2.22 December

# FIRELIGHT BASE

---

FireLight®

Platform

IXN INTEGRATION E-TICKET 2.22 DECEMBER

Document Version: 1.0

Published: October 08, 2021

**Insurance Technologies, LLC**

Copyright © 2021 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight® and FireLight® are registered or unregistered trademarks of Insurance Technologies, LLC (IT) in the USA and/or other countries.

ACORD, ACORD ObjX, ACORD OLifE, AL3, ACORD Advantage, ACORD XML, and "Association for Cooperative Operations Research and Development" are registered or unregistered trademarks of ACORD Corporation in the USA and/or other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, Windows, and other Microsoft names and logos are either registered or unregistered trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

All other trademarks are the property of their respective owners.

The information contained in this document is current as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, Insurance Technologies, LLC cannot guarantee the accuracy of any information presented after the date of publication.

INSURANCE TECHNOLOGIES, LLC MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT AND HEREBY DISCLAIMS ANY AND ALL SUCH WARRANTIES.

The material contained in this document is considered confidential and the intellectual property of Insurance Technologies, LLC. The recipient is given access to this material on the condition that the recipient (1) will keep the information confidential at all times, and (2) will not copy or modify or share the materials, except as expressly authorized by Insurance Technologies, LLC. The recipient should limit its disclosure of the information and materials only to its employees who have a clear business purpose and need to receive such information and materials and who are bound by confidentiality obligations to the recipient that are at least as protective of such information and materials as those contained herein.

**Insurance Technologies, LLC**

Two South Cascade Avenue  
Colorado Springs, CO 80903  
USA

Phone: 719.442.6400

FAX: 719.442.0600

Internet E-Mail: [info@insurancetechnologies.com](mailto:info@insurancetechnologies.com)

Website: <http://www.insurancetechnologies.com>

## Table of Contents

iConnect 251421 Design Approach - IXN Integration E-Ticket 2.22 December .....	4
1 IXN: Support e-Ticket from IXN.....	4
1.1 IXN: Support IXN E-Ticket Method .....	4
1.2 IXN: Error Handling.....	4
2 E-Ticket: Email Templates .....	5
2.1 IXN: Adding email template to support E-Ticket Delivery .....	5
3 IXN: Support Illustration as Next Activity .....	6
3.1 IXN: Child Rider Limits .....	7
3.2 IXN: Provide IXN with data in Quote Action for Illustration Action .....	7
3.3 IXN: Evaluate IXN Response for Illustration .....	7

# iConnect 251421 Design Approach - IXN Integration E-Ticket 2.22 December

A new activity for E-Ticket has been added to FireLight and will be accessible in the Agency Life Quoter for carriers to support eTicket submissions. The eTicket will use the Acord 103-10301 Ticket App activity. FireLight Illustration will also be added for clients to access through an "Illustrate" button on the Agency Life Quoter for available products. The E-Application will authenticate from IXN to FireLight with agent email when selecting "E-Apply" from the ALQ. FireLight E-Application will be accessible from the ALQ by following this process, including the FireLight E-Signature process.

## Impacts:

E-Tickets submitted in IXN will be transmitted and supported by FireLight

Access to FireLight Illustrations will be available through the ALQ. An "Illustrate" action will be displayed for available products.

Authentication will occur behind the scenes from IXN to FireLight

## 1 IXN: Support e-Ticket from IXN

FireLight will now support IXN e-Ticket. A new Activity type is available for the IXN e-Tickets and a method will be setup from IXN for FireLight to call.

### 1.1 IXN: Support IXN E-Ticket Method

Clients may use FireLight to support E-Tickets from IXN. Existing functionality will be used to support the E-Ticket using the setup for the E-Application developed in a previous release. E-Tickets will use the Ticket App (Acord 103-10301) Activity setup in FireLight.

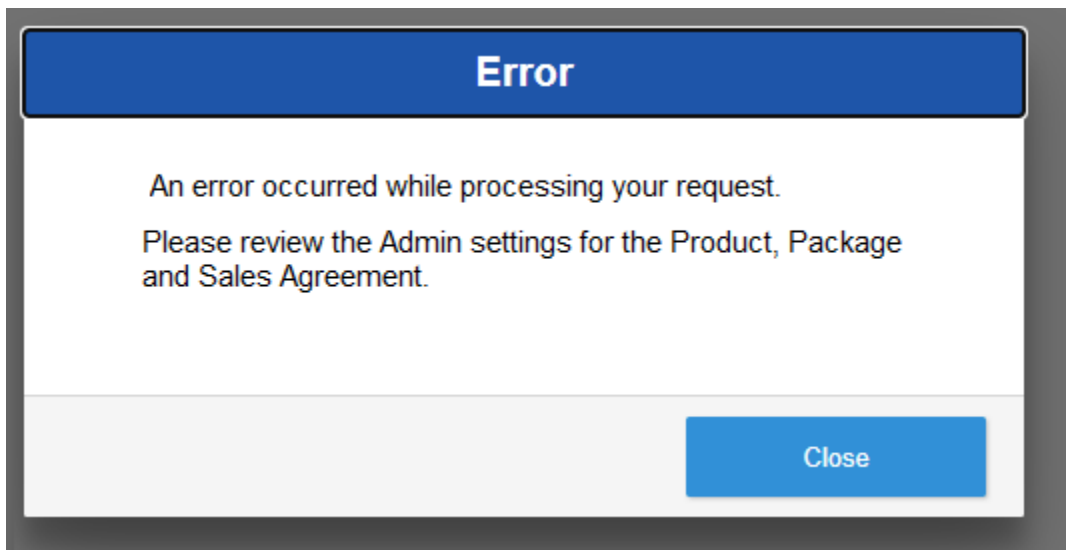
Product availability will be checked for to create the E-Ticket and handle the E-Ticket action. Current E-Apply method will be modified to include the handling for the E-Ticket.

#### *Acceptance Criteria*

- E-Tickets from IXN are received by FireLight and use Acord 103-10301.
- E-Tickets are displayed in FireLight on the Recent Activity and All Activities views.

### 1.2 IXN: Error Handling

When a product is available for E-App, E-Ticket and/or Illustration, but does not have the proper setup of packages/forms/wizards, etc. FireLight will not allow continuation of the activity. The user will be provided with an error message for the activity and will not be able to proceed without correcting the admin for the product in FireLight.



### ***Acceptance Criteria***

- When product is available but not properly setup in Admin, the user receives an error.
- Once setup is resolved in Admin, user can proceed with the product.

## **2 E-Ticket: Email Templates**

### **2.1 IXN: Adding email template to support E-Ticket Delivery**

A new email template will be added specific to the E-Ticket workflow.

The Email category will be E-Ticket, and the Email Template Type will be "E-Ticket Next Steps Notification"

Email Subject Line: <CLIENT\_NAME> Regarding <APPLICATION\_NAME> - Next steps

Dear <CLIENT\_NAME>,

Thank you for applying for '<PRODUCT\_NAME>' of <COMPANY\_NAME>. You will be contacted by a trained professional from <MESSAGE> to conduct an interview in order to complete the next phase of

your application process. Having the following information available will help you keep your interview as brief as possible:

<MESSAGE>

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

Sincerely, <AGENT\_NAME>

### ***Acceptance Criteria***

- Email Category will list out E-Ticket when referencing Ticket emails
- Email Template Type will list "E-Ticket Next Steps Notification" referencing next steps
- Email will contain Email Subject Line: <CLIENT\_NAME> Regarding <APPLICATION\_NAME> - Next steps
- Email Body will state: Dear <CLIENT\_NAME>,
- Thank you for applying for '<PRODUCT\_NAME>' of <COMPANY\_NAME>. You will be contacted by a trained professional from <MESSAGE> to conduct an interview in order to complete the next phase of your application process. Having the following information available will help you keep your interview as brief as possible:
- <MESSAGE>
- If you have any questions please feel free to contact me.
- Sincerely, <AGENT\_NAME>
- <MESSAGE> The first instance within the body of the email will be customized by the client to indicate the vendor serving as the fulfillment center on behalf of the carrier.
- <MESSAGE> the final instance can be customized by the client to state next steps

## **3 IXN: Support Illustration as Next Activity**

IXN Quote embedded in FireLight currently provides the ability to add the action for FireLight e-Application. The ability to Illustrate from the IXN Quote will be added to provide additional functionality and actions to FireLight clients using the IXN Life Quote.

Impacts:

Life Quote - IXN embedded-action available for Illustrate

### 3.1 IXN: Child Rider Limits

Child term riders are currently supported in FireLight as dollar amounts. The IXN Quote expresses the child term in units instead of dollar amounts. FireLight will be updated to support Child Term Riders in Units.

#### ***Acceptance Criteria***

- Child Term riders are supported in FireLight in units.

### 3.2 IXN: Provide IXN with data in Quote Action for Illustration Action

FireLight will provide IXN with data in the quote action to determine when a product is available for illustration. IXN will display an action button for "Illustrate" in the IXN Agency Life Quoter (ALQ). The determination of product availability is based on product CUSIP and will follow the same process as the availability for FireLight E-Application and E-Ticket inside of the ALQ.

#### ***Acceptance Criteria***

- Illustration product availability is added to quote action for IXN to check availability for illustration on products.
- Illustrate button is displayed on IXN platform if FireLight product is available for Illustration.

### 3.3 IXN: Evaluate IXN Response for Illustration

Additional research is needed to determine if items from the IXN response are needed for illustration. Items to evaluate:

- Modal Values on Riders
- Premiums
- Policy Fees

IXN fields will be mapped over into FireLight using common tag items. The data fields will not be locked down that are required to run CRM for client data lookup upon entering the FireLight E-Ticket Wizard.

#### ***Acceptance Criteria***

- IXN data values are mapped successfully to FireLight common tag data items.
- CRM can be run in FireLight E-Ticket Wizard, when present.