

iConnect 165897 Design Approach - Disable Send Email Request

Project Overview

Add functionality to disable the Send Email Request on the Client Signature Choice screen. Current functionality requires the user to sign now or send an email request. This enhancement would allow the user to go directly to the Client Verification screen and skip the Client Signature Choice screen.

Features/Requirements

- Group Option--- 'Disable Send Email Request' – added to allow the option to be enabled by group role code.
- Allow user to jump directly to the Client Verification Screen.

Use Cases / Workflow Changes

- After selecting the appropriate signer(s), the user will be directed to the Client Verification Page.

Admin Changes

User will need to check the 'Disable Send Email Request' option in the group settings for the desired user. **You will not be able to use options 'Disable Sign Now' and 'Disable Send Email Request' together. There is validation in place to ensure that these options are not both checked.**


App Changes


If the option 'Disable Send Email Request' is checked in the group settings for the user, there will not be a Client Signature Choice screen and the user will be directed to the Client Verification page once they select a Signer.

Integration Changes

None Needed

UI Mock Ups

 **Create New**



BASEIT	External Role Code2	
Date Override	DO	X
Devel		X
FilterTest	FilterTest	X
For IT2	IT2Only	X
For IT3	IT3	X
IT User Group	IT	X
New User Group		X
New User Group2		X

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Name:
TC Role Codes:

App Only
Admin Only
Review Queue Only
Product Access
Case Access
Review Queue Access
Needs Filter

☐ Disable Save Application
☐ Disable View Application
☐ Disable View Application Summary
☐ Disable Edit Preferences
☐ Disable Email After Submit
☐ Enable Submit Email for Agent
☐ Enable Submit Email for Reviewer
☐ Disable Signing as Client
☐ Disable Signing as Agent
☐ Disable Sign Now
☒ **Disable Send Email Request**
☐ Disable Submit
☐ Disable Signing Until All Pages Viewed
☒ Agent Not Required to View All Pages
☐ Optional Client Email
☐ Allow PassCode Email

☐ Enable Use Screen Notification
☐ Enable Test Mode
☐ Enable Override Date
☐ Enable Cc Sender In All Requests
☐ Enable Single User to Sign Multi Signer Types
☐ Require Entry of Application Name
☐ Allow Not In Good Order Submittals
☐ Disable Console For Group
☐ Case Access by Firm ID
☐ Enable Override SSO
☐ Enable User Share
☐ Enable Multi-Life
☐ Enable Use Agent Email
☐ Enable Decline E-Sign Email
☐ Enable Create Benchmarks
☐ Enable View Benchmarks

How to Enable and Use This Feature

- In the Admin tool group options tab, select the checkbox for 'Disable Send Email Request'.
- In the App portal, create a new application and complete the app to 100%.
- Click 'Continue' and this will take you to a list of Signers.
- Select the appropriate Signer(s) and you will be directed to the Client Verification page.

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration	Yes	'Disable Send Email Request' option added to group options. Cannot have 'Disable Sign Now' and 'Disable Send Email Request' together.
- Reports		

- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process	Yes	User will skip the client choice screen and jump directly to Client Verification if the 'Disable Send Email Request' option is checked
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		