INSURANCE TECHNOLOGIES

Branding the FireLight Access login email

FIRELIGHT BASE

FireLight®

Platform

INSURANCETECHNOLOGIES.COM

Insurance Technologies, LLC

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
Website: http://www.insurancetechnologies.com

Table of Contents

iConnect 239965 Design Approach - Branding the FireLight Access login email

Project Overview

Clients will have the ability to professionally brand the system generated FireLight Access email that sends the users their firelight user login and password reset information. This will be able to provide our clients the ability to add their professional touch to these emails and provide their company identification to their agents. Clients can also alter the email verbiage to make it more company centric.

To accommodate above requirement, three new email templates for "Firelight Access Login for FL user", "Firelight Access Login when adding existing user to new organization" and "Your Firelight Access Password Reset" will be added to firelight email section where clients can customize these email category as per their company branding. This will be a base enhancement and based on this, clients will be able to further customize HTML templates for these emails. Ability to customize HTML templates for these emails is not in the scope of this current feature.

Impact (FireLight Access Clients Only): Admin -> Organization Configuration -> Email - A new email category and template type for FL Access login email will be added on this screen to allow client customization

1   Include FL Access login email for email branding

To add FL Access login and password reset emails into branding templates, changes will be done to FL Admin Email template section. On Email template screen new templates will be added for the clients to customize these emails as per their company branding.

Below email templates will be added.

A. Firelight Access Login Email Template: Currently there are 2 different user emails sent at the time of FL Access login.

1.   When an Admin creates a FL user
2.   When an existing user is added to an organization

Following templates for these emails will be added on above screen:

1. Login email for FL user:

Email Category - "*Firelight Access*"

Email Template Type - "*Firelight Access Login for FL user*"

Email Subject Line - "*Your FireLight Login*"

Email Template - Replacement variables within the angular brackets will be fixed and text other than these variables can be customized.

"Dear <USER_NAME>,

Welcome to FireLight® Access. <ORG_NAME> has made it possible for you to submit business electronically using Firelight and avoid the hassles and cost of doing business with paper applications. By selecting the link below, you will be able to edit your account information prior to submitting business through FireLight®. Completing this information will save you time by pre-populating your information on all the applications you submit.

To log in:

1. *Navigate to <URL_LINK>*

2. *Enter your email address <USER_EMAIL>*

3. *Enter your temporary password: <USER_PWD>*

Edit/complete as much of your information as possible. This will save you time on every application you submit.

Please address any questions to <ORG_EMAIL>.

Sincerely,

<ORG_NAME>"

Below mockup shows changes (highlighted) that will be made to add this new email template.

Email Template - FL Access Carrier - Test

FL Access Carrier - Test

Email Category — Firelight Access

Email Template Type — Firelight Access Login for FL user

Locale — English (en-US)

Email Subject Line — **Your FireLight Login**

Email Template

Dear <USER_NAME>,

Welcome to FireLight® Access. <ORG_NAME> has made it possible for you to submit business electronically using Firelight and avoid the hassles and cost of doing business with paper applications. By selecting the link below, you will be able to edit your account information prior to submitting business through FireLight®. Completing this information will save you time by pre-populating your information on all the applications you submit.

To log in:
1. Navigate to <URL_LINK>
2. Enter your email address <USER_EMAIL>
3. Enter your temporary password: <USER_PWD>

Edit/complete as much of your information as possible. This will save you time on every application you submit.

Please address any questions to <ORG_EMAIL>.

Sincerely,
<ORG_NAME>

Email Preview

No HTML template available for email branding.

Save Email Template

2. Login email when adding existing user to a new organization:

Email Category - "*Firelight Access*"

Email Template Type - "*Firelight Access Login when adding existing user to new organization*"

Email Subject Line - "*Your FireLight Login*"

Email Template - Replacement variables within the angular brackets will be fixed and text other than these variables can be customized.

"Dear <USER_NAME>,

Welcome to FireLight® Access. <ORG_NAME> has made it possible for you to submit business electronically using Firelight and avoid the hassles and cost of doing business with paper applications. By selecting the link below, you will be able to edit your account information prior to submitting business through FireLight®. Completing this information will save you time by pre-populating your information on all the applications you submit.

To log in:

1. *Navigate to <URL_LINK>*

2. *Enter your email address <USER_EMAIL>*

3. *Enter your account password.*
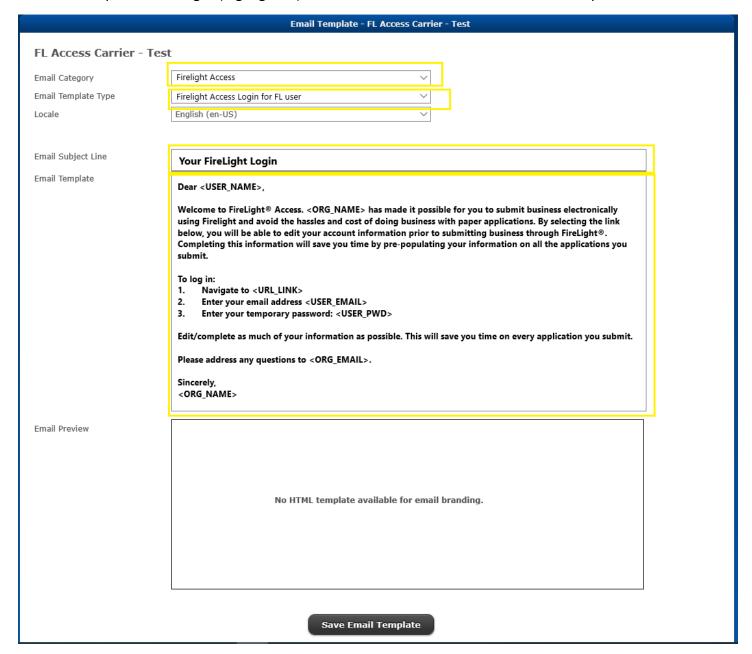
Please address any questions to <ORG_EMAIL>.

Sincerely,

<ORG_NAME>"

Below mockup shows changes (highlighted) that will be made to add this new email template.

Email Template - FL Access Carrier - Test

FL Access Carrier - Test

Email Category	Firelight Access ▾
Email Template Type	Firelight Access Login when adding existing user to new organization ▾
Locale	English (en-US) ▾

Email Subject Line

Your FireLight Login

Email Template

Dear <USER_NAME>,

Welcome to FireLight® Access. <ORG_NAME> has made it possible for you to submit business electronically using Firelight and avoid the hassles and cost of doing business with paper applications. By selecting the link below, you will be able to edit your account information prior to submitting business through FireLight®. Completing this information will save you time by pre-populating your information on all the applications you submit.

To log in:

1.	Navigate to <URL_LINK>

2.	Enter your email address <USER_EMAIL>

3.	Enter your account password.
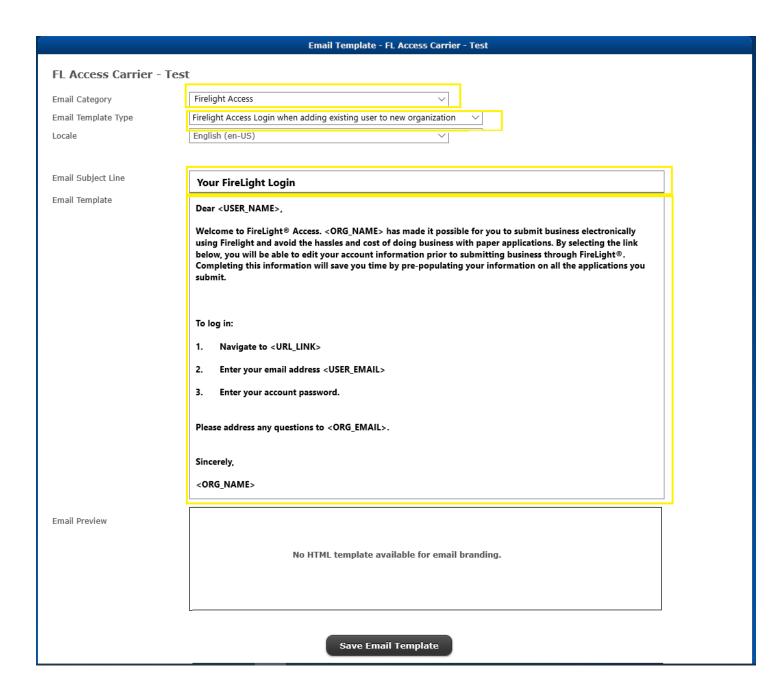
Please address any questions to <ORG_EMAIL>.

Sincerely,

<ORG_NAME>

Email Preview

No HTML template available for email branding.

Save Email Template

B. For Firelight Access Password Reset email template, following options will be added:

Email Category - "*Firelight Access*"

Email Template Type - "*Your Firelight Access Password Reset*"

Email Subject Line - "*FireLight Access password reset*"

Email Template - Replacement variables within the angular brackets will be fixed and text other than these variables can be customized.

"*Hello,*

You (or someone else) requested resetting the password for your Firelight Access account.

To continue the password reset process, please click this link:

<URL_LINK>"

Below mockup shows changes (highlighted) that will be made to add this new email template.

Email Template - FL Access Carrier - Test

FL Access Carrier - Test

Email Category	Firelight Access
Email Template Type	Your Firelight Access Password Reset
Locale	English (en-US)

Email Subject Line	FireLight Access password reset
Email Template	Hello, You (or someone else) requested resetting the password for your FireLight Access account. To continue the password reset process, please click this link: <PWD_RESET_LINK>

Email Preview	No HTML template available for email branding.

Save Email Template

Acceptance Criteria

- Changing text for FL Access login email for an FL Access client is possible.
- This change does not customize email text for FL Access admin users.
- Addition of new template does not impact other templates
- Below info is visible for the new FL Access login email for FL User:
  - Email Category - "Firelight Access"
  - Email Template Type - "Firelight Access Login for FL user"
  - Email Subject Line - "Your FireLight Login"
  - Email Template -
    "Dear <USER_NAME>,

    Welcome to FireLight® Access. <ORG_NAME> has made it possible for you to submit business electronically using Firelight and avoid the hassles and cost of doing business with paper applications. By selecting the link below, you will be able to edit your account information prior to submitting business through FireLight®. Completing this information will save you time by pre-populating your information on all the applications you submit.

    To log in:
    1.   Navigate to <URL_LINK>
    2.   Enter your email address <USER_EMAIL>
    3.   Enter your temporary password: <USER_PWD>

    Edit/complete as much of your information as possible. This will save you time on every application you submit.

    Please address any questions to <ORG_EMAIL>.

    Sincerely,
    <ORG_NAME>"
- Below info is visible for the new FL Access login email when adding existing user to a new organization:
  - Email Category - "Firelight Access"
  - Email Template Type - "Your Firelight Access Login when adding existing user to new organization"
  - Email Subject Line - "Your FireLight Login"
  - Email Template -
    "Dear <USER_NAME>,

Welcome to FireLight® Access. <ORG_NAME> has made it possible for you to submit business electronically using Firelight and avoid the hassles and cost of doing business with paper applications. By selecting the link below, you will be able to edit your account information prior to submitting business through FireLight®. Completing this information will save you time by pre-populating your information on all the applications you submit.

To log in:
1.   Navigate to <URL_LINK>
2.   Enter your email address <USER_EMAIL>
3.   Enter your account password.

Please address any questions to <ORG_EMAIL>.

Sincerely,
<ORG_NAME>"

- Changing text for FL Access password reset email is possible
- Below info is visible for the new FL Access password reset email category:
  - Email Category - "Firelight Access"
  - Email Template Type - "Your Firelight Access Password Reset"
  - Email Subject Line - "FireLight Access password reset"
  - Email Template -

    "Hello,

    You (or someone else) requested resetting the password for your Firelight Access account.

    To continue the password reset process, please click this link:

    <URL_LINK>"