
Create Post Issue Email Category

FIRELIGHT BASE

FireLight®

Platform

CREATE POST ISSUE EMAIL CATEGORY

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Insurance Technologies, LLC

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iConnect 257954 Design Approach – Create Post Issue Email Category

Project Overview

This feature will add new email templates for Post Issue activity type. Currently the system has email templates for different activity types such as E-Delivery, Pre-Sale, Quote, Illustration, etc., but not for post-Issue. These email templates are used to automatically send an email at various stages of an activity such as, Client fill & Sign, when an activity is submitted, when signatures are requested and completed, etc.

Presently post-issue uses email templates same as the “Activities” type of email category. With this enhancement, email templates for post-issue will be separated under a new email category as “Post-Issue”. Clients will have the ability to customize email templates specific to the post-issue type of activity.

Email templates being added for Post Issue email category will be:

1. Client Request to Fill - Post-Issue
2. Download Completed - Post-Issue
3. Signature Request - Post-Issue

Impacts: New email category, template type and email text will be added to screen FLAdmin -> Organization Config -> Email.

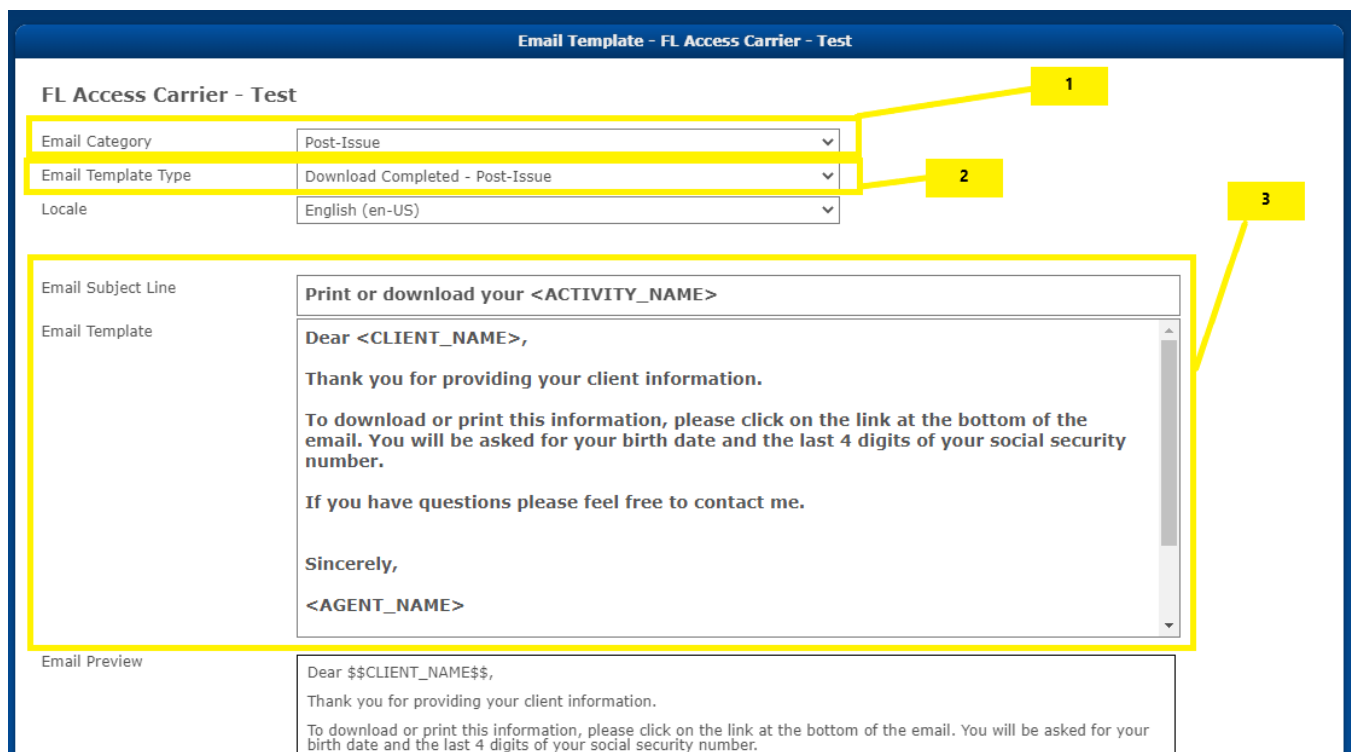
1 Add Email templates for Post Issue

Create a new email category and templates for Post-Issue type of activity. These email templates will be same as Pre-Sale type of activity. The email templates for Post-Issue email category will be used at the time of below actions for Post-Issue activity:

1. When user sends a post-issue activity to a client for fill or to fill & sign.
2. When post-issue activity is complete, and the client is informed to print or download the documents.
3. When an email signature request is pending at client's end.

Below changes will be made to screen - FLAdmin -> Organization Config -> Email.

1. Add new Email Category as "Post-Issue"
2. Add 3 new Email Template Types as:
 - Client Request to Fill - Post-Issue
 - Download Completed - Post-Issue
 - Signature Request - Post-Issue
3. Add Email Subject Line and Email Template text for the new template types same as pre-sale.



Email Template - FL Access Carrier - Test

FL Access Carrier - Test

Email Category: Post-Issue

Email Template Type: Download Completed - Post-Issue

Locale: English (en-US)

Email Subject Line: Print or download your <ACTIVITY_NAME>

Email Template:

Dear <CLIENT_NAME>,

Thank you for providing your client information.

To download or print this information, please click on the link at the bottom of the email. You will be asked for your birth date and the last 4 digits of your social security number.

If you have questions please feel free to contact me.

Sincerely,

<AGENT_NAME>

Email Preview:

Dear \$\$CLIENT_NAME\$\$,

Thank you for providing your client information.

To download or print this information, please click on the link at the bottom of the email. You will be asked for your birth date and the last 4 digits of your social security number.

Acceptance Criteria

- New email category for Post-Issue is added to the drop down.
- Three new email template types under "Post-Issue" email category are added to the drop down.

- When a template type is selected under email category "Post-Issue", it allows editing the subject line and template text.
- When a user sends a post-issue activity to client for signing, an email is sent using the template "Client Request to Fill - Post-Issue".
- When a user sends a post-issue activity is complete, an email is sent using the template "Download Completed - Post-Issue".
- When a user sends a post-issue activity is complete, an email is sent using the template "Signature Request - Post-Issue".