
Allow Product Organization Name on Sales Agreement

FIRELIGHT BASE

FireLight®

Platform

ALLOW PRODUCT ORGANIZATION NAME ON SALES AGREEMENT

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Insurance Technologies, LLC

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iConnect 264571 Design Approach – Allow Product Organization Name on Sales Agreement

Project Overview

Currently FireLight has an option to enter a "Product Organization Name" for each of the products on the "Products" page in the Admin tool. This "Product Organization Name" appears as a selling carrier on the new product selection page on the app side, to allow users to filter the products based on the listed carriers. This enhancement will allow clients to enter a "Product Organization Name" for the Sales Agreements as well, for each of the Selling Organizations.

Use Case: Client ABC has multiple carriers that share products, most commonly Dist111 and Dist222. When one of the distributors wants a specific Organization name to appear next to a product, Client ABC should be able to do it by entering product specific organization names for each of the Selling Org rather than building multiple products to facilitate this.

Impact:

- FLAdmin: Product Config > Sales Agreements > Product Organization Name (new text box).
- FLApp: List the product organization value into the Carriers drop down and in the product list on new product selection page.
- FLAdmin: Changes will be recorded and show at the Sales Agreement History tab.


1 Admin: Add Product Organization Name Field for Sales Agreements

A new field "Product Organization Name" will be added on the Sales Agreements page in the Admin Tool. Admin user can enter an organization name for each of the sales agreements specific to the selling organization. The name entered as the "Product Organization Name" will then be listed into the Carrier drop down on the new product selection page.

Below is the mockup for the field to be added on FL Admin > Product Config > Sales Agreement page.

Sales Agreements

FL Access Carrier - Test



Product	Agreement	
E-Delivery Sign Only product_OP	True	X
Pre-Signature Review	True	X
_TomD - Telesign	True	X
001 Testing	True	X
01 Non Insurance prod	True	X
01 Non Insurance prod	True	X
Accumulation Product	True	X
Addendum Doc Signing App	True	X
Addendum Testing App	True	X

Sales Agreement of "FL Access Carrier - Test" for product " E-Delivery Sign Only product_OP"

Selling Org FL Access Carrier - Test*

* By Org Will Indicate an active Sales Agreement

Product Name

Product Organization Name

More Info

Start End

Time Zone ▼

Replace Product Select Replaced Product ▼

Illust Services Role

Last Updated 7/12/2022 7:54 AM UTC

State Approvals
Back Office Script
Options

State	Approved
Alabama	✓
Alaska	✓
Arizona	✓
Arkansas	✓
California	✓

☒ Check/Uncheck All
☐ Display Approved States during signing ceremony

Packages
Custom Lists

Available Packages

23 May Package Application

23 May Package Application

AccountOpening_Package Account Opening

Addendum Testing Package-Form&Wiz Application

AM Annuity French Package Application

AM Annuity French Package Application

AM Annuity Package Application

AM Annuity Spanish Package Application

Annuity Rates DRAFT Application

Assigned Packages

E-Delivery Sign Only package_OP
E-Delivery Deliver Only
Package Duty Required ▼

Save Sales Agreement
Manage Sales Agreement

This new field "Product Organization Name" will be an optional field that will be added for both Carrier and Distributor environments. When "Product Organization Name" is entered for a Distributor Sales Agreement in the Carrier environment, it will be deployed to the selected Distributor environment through Deployment method.

When "Manage Sales Agreement" button is clicked, and the selected sales agreement is copied to other selling organizations, value from "Product Organization Name" will not be copied to the other selling organizations. So that user can set the "Product Organization Name" individually for each of the selling organization for a product.

Acceptance Criteria

- New field "Product Organization Name" is added on the Sales Agreement page in the admin tool.
- Value entered in the "Product Organization Name" is listed as a carrier on the new product creation page for that product in the app.
- New field "Product Organization Name" is not a mandatory field, and the sales agreement can be saved without entering a value.
- New field "Product Organization Name" is available for Carrier and Distributor environments.
- When a sales agreement is copied to another selling organization, the value from "Product Organization Name" is not copied.

2 Admin: Update Sales Agreement History

When value for "Product Organization Name" is updated, this change will be recorded into the database and shown at the "Sales Agreement History" tab.

Action column will show text "Product Organization Name was updated for selling org: <Selling Organization Name>".

Old Value, New Value, Action Date and Login columns will show the appropriate values as per the changes.

Below mockup shows the info that will show on the history tab when product organization name is updated.

Sales Agreement Details		Sales Agreement History		
Action	Old Value	New Value	Action Date	Login
Sales Agreement saved and updated for selling org: Insurance Technologies			7/25/2022 6:54 AM	IT
Product Organization Name was updated for selling org: Insurance Technologies	Life Extent Plan	Life Plan	7/25/2022 6:54 AM	IT

Acceptance Criteria

- Product Organization Name changes for a sales agreement are recorded and displayed at the Sales Agreement History tab.

3 Admin: Manage Deployment Process

The new field "Product Organization Name" will also be included at the deployment process when Sales Agreement data is deployed from:

- a Carrier to a Distributor environment
- for a selling organization from one environment to next environment

When "Product Organization Name" is entered for a Distributor Sales Agreement in the Carrier environment, it will be deployed to the selected Distributor environment through Deployment method.

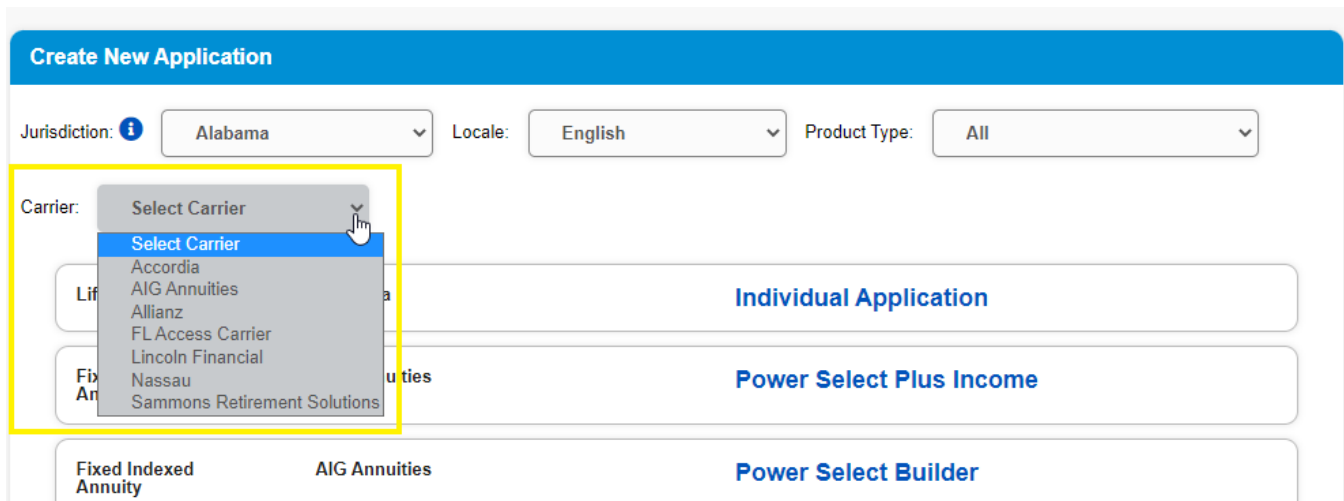
Acceptance Criteria

- Added/updated value for Product Organization Name entered for a selling organization in UAT environment is available for that selling organization in Staging environment via the deployment process.
- Added/updated value for Product Organization Name entered for a distributor from carrier environment is available for that distributor in their own organization environment via the deployment process.

4 App: List Product Organization Name for New Product Creation

The value entered in the field "Product Organization Name" on the sales agreement page will appear in the "Carrier" list on the new product creation page to filter products.

Below mockup shows the Carrier drop down that appears on the new product selection page. The entered product organization name will be listed in this Carrier drop down when there is any values available for any of the listed products.



The "Product Organization Name" (from Sales Agreement page) will also be listed as the selling organization beside the product name on the product selection list.

For a product, value entered in "Product Organization Name" on Sales Agreement page will be prioritized over the value entered on Products page.

Case1: For a product "Power Select Builder", "InsTech" is entered on Products page. And on Sales Agreement page value is "Insurance Technologies" for selling org Insurance Technologies. On new product selection page, Carrier drop down will show "Insurance Technologies".

Case2: For a product "Power Select Builder", "InsTech" is entered on Products page. And on Sales Agreement page there is no organization name entered for selling org Insurance Technologies. On new product selection page, Carrier drop down will show "InsTech".

Acceptance Criteria

- Entered "Product Organization Name" is listed as a carrier on new product selection page (in the app) when there are any values available for any of the listed products.
- "Product Organization Name" is listed next to the product name on the product list.
- Organization name entered on Sales Agreement page will take priority over the organization name entered on Products page.