

iConnect 135145- Design Approach for Email Template Subject

Project Overview

Ability to update email template subject lines for emails generated in the FireLight App Portal

Features/Requirements

- Admin tool email template tab will include a subject line with the default subject line text for each email type
- Subject line can be changed by typing in the subject line text area of the email template in the Admin tool
- Text replacement for common dataitems and search items will be available in the subject line
- Current capabilities to edit email subject line when disable edit email is not selected at the organizational level will remain unchanged in the app portal
- Ability to use text replacement for common dataitems and search items in the subject line of the email template in the app portal added

Use Cases / Workflow Changes

Organization can alter the subject line of each email template in Email under the Profiles tab of the Admin tool. This will be saved and used for all outgoing emails for users in the FireLight app portal. Text replacement can replace the common dataitems and search items within the subject line just as in the body of the email.

If 'Disable Edit Email' is not selected at the organizational level within the Organization tab of the Admin tool, users may also edit the subject line of the email template in the app portal for client fill requests and signature requests. Text replacement will work the same as in the admin tool's email templates.

Admin Changes

Added text area within the email template will display the default subject line for each email template. Any changes to the template will be saved and used in outgoing email's within the FireLight application process. Text replacement capabilities will also be added.

App Changes

Added text area within the email template will display the default subject line for each email template. Any changes to the template will be saved and used in outgoing email's within the FireLight application process. Text replacement capabilities will also be added.

Integration Changes

None needed

UI Mock Ups

Admin Tool- Email Templates under Profiles Tab

Insurance Technologies

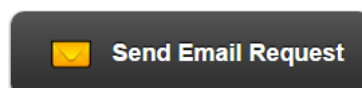
Email Template Type	Review Request Email Template
Email Subject Line	Review Request for <APPLICATION_NAME>
Email Template	<p>Dear <REVIEWER_NAME>,</p> <p>Please review the following client's application for '<PRODUCT_NAME>' of <COMPANY_NAME>.</p> <p>Click on the link at the bottom of the email to review and approve the application. You will be asked to acknowledge your acceptance of the disclosure terms and consents. The instruction for completing your 'Electronic Signature' will be provided as well.</p> <p>Please use the Passcode to login. I will be providing this Passcode via phone or a separate email.</p> <p>If you have questions please feel free to contact me.</p> <p>Sincerely,</p> <p><AGENT_NAME></p> <p>To review the application, click on <URL_LINK>, and enter the Passcode. If a new window does not automatically appear, you may have to copy the link and paste it into the address bar of new browser window.</p>

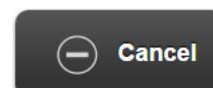
Send Email To Client To Request Signatures

Your client will receive an email message with instructions to complete the electronic application process.

Client Name:		Subject:	Signature Request for <APPLICATION_NAME>
Client Email:			Dear [CLIENT_NAME],
Your Name:	Agent		Thank you for applying for 'Jennie Rule Test' of Insurance Technologies.
Your Email:	tester@insurancetechnologie		Sincerely,
* Client Last 4 Digits of SSN:			Agent
* Client Birth Date:		Message:	

* These values will not show in email.

 **Send Email Request**

 **Cancel**

How to Enable and Use This Feature

Altering Subject Line Using Admin Tool

- Click on Profiles link in the Admin tool and select Email
- Choose the Email Template Type from the drop-down that you would like to alter
- Include a common dataitem, such as <APPLICATION_NAME>, in the subject line to test text replacement
- Change the Email Subject Line and click ‘Save Email Template’ button
- Login to app portal and create email for the altered type.
- Verify the changes in the generated email template (if client fill or client sign request) or in the email that is sent to your email server
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Altering Subject Line Using App Portal

- In the Admin tool on the Organization tab, ensure that ‘Disable Edit Email’ is unchecked
- Create an application within the app portal
- Create a Client Fill request by selecting ‘Request Client to Fill App’ from the Other Actions drop-down or a signature request by completing the application, accepting electronic signature, and clicking ‘Send Email Request’ for a particular signer
- Change the Email Subject Line and include a common dataitem in the subject line to test text replacement
- Send email request and verify the subject line in the email that is sent to your email server

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form Library		
- Design Forms		
- Profile Administration		Email template subject line
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application		
- Signature Process		

- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		Email template subject line
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		