

# How-to – Sorting Hat Find an Agent US

V1.0-Global Marketing Technology-AEM

**Component Name: Find an Agent - US**

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# 1 Document History

The following important changes have been made to this document:

Date	Version #	Description of Changes Made	Author	Approved By
October 10 - 2019	1.0	Initial Draft	Christopher Restino	

## Table of Contents

### Contents

<b>1</b>	<b>DOCUMENT HISTORY .....</b>	<b>2</b>
<b>2</b>	<b>INTRODUCTION.....</b>	<b>4</b>
2.1	SHORT DESCRIPTION.....	4
2.2	AEM COMPONENT DATA MODEL.....	5
2.3	INTENDED AUDIENCE .....	5
<b>3</b>	<b>HOW TO ENABLE/TURN-ON THE COMPONENT.....</b>	<b>6</b>
<b>4</b>	<b>COMPONENT DIALOG.....</b>	<b>7</b>

## 2 Introduction

This document provides “How to Instructions” for the component “Find an Agent – US on the Anticipatory Pathing Tool (Sorting Hat)”. This component is intended to be used in all Evolution pages, including:

- Home page
- Solution Category page
- Solution Detail page

### 2.1 Short Description

This is intended to path users to the correct destination, or complete certain tasks in line. This is a Drag and Drop component available in the AEM Side-kick. This component includes Choose Insurance screen and Find an Agent screen.

#### Feature Overview

Find an Agent – CTA on the Sorting Hat container to navigate to the Find an Agent – US flow

**Choose Insurance** – option to choose Insurance

Following rules are enforced:

- Min items on Choose a Network screen – 2
- Max items on Choose a Network screen – 8

#### Desktop/Tablet

- when more than 6 include a Text link to show more choices

#### Mobile

- when more than 4 include a Text link to show more choices

**Find an Agent screen** – includes CTA to navigate to Find a Vision Provider results screen

**Find an Agent By Name** – option to navigate to Find an Agent by Name overlay

**Back Button** – option to navigate to the previous screen (available starting on the Second screen on the flow)

## 2.2 AEM Component Data Model

Tab	Field Name	Field Group	Field Type	Validation	Accepted values
Configuration	Sorting Hat Menu Item - Config				
	Title	Configuration	Text Field	Mandatory Max Char. 45	Alphanumeric
	Icon	Configuration	Drop Down	Mandatory	List of Tile Icons
	Plan Overlay Config				
	Insurance Type Overlay Headline	Configuration	Text Area	Mandatory Max Char. 50	Alphanumeric
	Agent Options	Configuration	Path Field	Optional	Valid URL
	Custom Agent Options	Configuration	Multifield Panel	Optional	Agent Options
	Label	Configuration	Text Field	Mandatory	Text
	Value	Configuration	Text Field	Mandatory	Text
	Find an Agent By Name Label	Configuration	Text Field	Optional	Text
	Find an Agent By Name Link	Configuration	Path Field	Optional	Valid URL/page path
	Find Agent Submission Overlay Headline				
	Find Agent Submission Overlay Headline	Configuration	Text Area	Mandatory Max Char. 50	Alphanumeric
	Agent Placeholder	Configuration	Text Field	Optional	Alphanumeric
	Error Message Text	Configuration	Text Field	Optional	Alphanumeric
	Submit Button Text	Configuration	Text Field	Optional Max Char. 25	Alphanumeric

## 2.3 Intended Audience

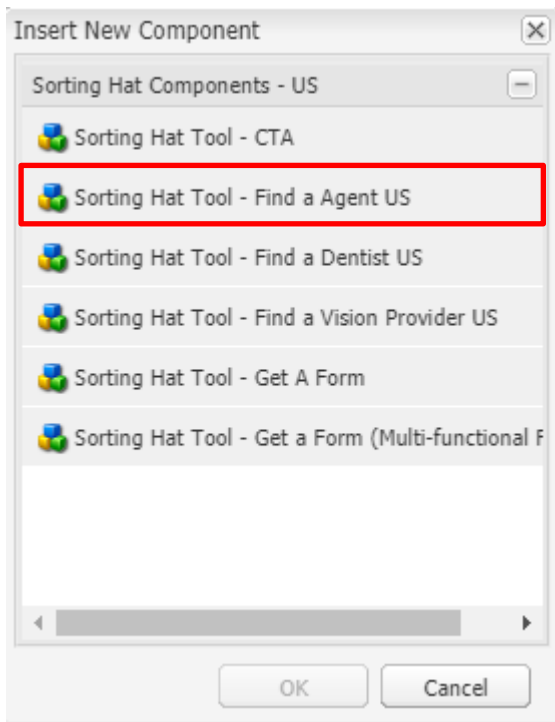
The primary audience of this design is:

- Content Authors
- Agencies
- Marketers

### 3 How to Enable/Turn-On the Component

This component/feature is available in the sidekick and can be dragged onto only the parsys configured in the Sorting Hat container Component

- From Sidekick, select market specific sorting hat component group then “Sorting Hat Tool – Find a Agent US”



## 4 Component Dialog

Right click and press edit or double click the component to open the dialog.

### Configuration Tab

This tab contains the overall component configurations

1. Title – Text that shows up on the tile in the sorting hat container
2. Icon – Icon that shows up on the tile in the sorting hat container
3. Insurance Type Overlay Headline – Text on the left side of the sorting hat container changes to this when the insurance type overlay section is shown
4. Agent Options - a list in the miscadmin that contains the US Agent details
5. Custom Agent Options – Multifield that allows you to add Agent Options Manually
6. Label – label of the Agent Option
7. Value – Value of the Agent Option
8. Find an Agent by Name Label – label text for find an agent by name link
9. Find an Agent by Name Link – redirect URL for the find an agent by name link
10. Find Agent Submission Overlay Headline – Text on the left side of the sorting hat container changes to this when the Find agent submission overlay section is shown
11. Agent Placeholder – placeholder text for find an agent input.
12. Error Message Text – text for when user doesn't enter correct value in input
13. Submit Button Text – text for submit button CTA

**Configuration**

▲ Sorting Hat Menu Item - Config

Title\*

Icon\*

Please choose an icon from the dropdown

▲ Plan Overlay Config

Insurance Type  
Overlay Headline\*

Agent Options

Custom Agent  
Options

[Add Option](#) 

Click the '+' to add a new option

Find an Agent By  
Name Label

Find an Agent By  
Name Link

▲ Find Agent Submission Overlay Config

Find Agent  
Submission Overlay  
Headline\*

Agent Placeholder

Error Message Text

Submit Button Text

OK

Cancel



What would you like to do today?

Find a Dentist

Find an Agent

Find Broker Resource

Show More +

Find a Vision Provider

Find an Agent US Configuration

Sorting Hat Menu Item - Config

Title\* Find an Agent

Icon\* Agent

Plan Overlay Config

Insurance Type Overlay Headline\* Choose type of insurance

Agent Options

Custom Agent Options

Label*	Auto and Home Insurance	
Value*	PC	
Label*	Business	
Value*	COM	

Find an Agent By Name Label Find an Agent By Name

Find an Agent By Name Link http://agents.metlife.com/

Find Agent Submission Overlay Config

Find Agent Submission Overlay Headline\* Find an agent in your area.

Agent Placeholder Enter Zip, City or State

Error Message Text Enter Zip, City or State

Submit Button Text Find an agent

Choose type of insurance

Auto and Home Insurance

Business

Find an Agent By Name

Find an Agent US Configuration

Sorting Hat Menu Item - Config

Title\* Find an Agent

Icon\* Agent

Plan Overlay Config

Insurance Type Overlay Headline\* Choose type of insurance

Agent Options

Custom Agent Options

Label*	Auto and Home Insurance	
Value*	PC	
Label*	Business	
Value*	COM	

Find an Agent By Name Label Find an Agent By Name

Find an Agent By Name Link http://agents.metlife.com/

Find Agent Submission Overlay Config

Find Agent Submission Overlay Headline\* Find an agent in your area.

Agent Placeholder Enter Zip, City or State

Error Message Text Enter Zip, City or State

Submit Button Text Find an agent

**H** Find an agent in your area.

**J** Enter Zip, City or State

**K** FIND AN AGENT

Find an Agent By Name

**I** Enter Zip, City or State

Enter Zip, City or State

FIND AN AGENT

Find an Agent By Name

Find an Agent US

Configuration

Sorting Hat Menu Item - Config

Title\* Find an Agent

Icon\* Agent

Please choose an icon from the dropdown

Plan Overlay Config

Insurance Type Overlay Headline\* Choose type of insurance

Agent Options

Custom Agent Options

Label\* Auto and Home Insurance

Value\* PC

Label\* Business

Value\* COM

Add Option

Click the '+' to add a new option

Find an Agent By Name Label Find an Agent By Name

Find an Agent By Name Link http://agents.metlife.com/

Find Agent Submission Overlay Config

Find Agent Submission Overlay Headline\* Find an agent in your area.

Agent Placeholder Enter Zip, City or State

Error Message Text Enter Zip, City or State

Submit Button Text Find an agent

OK Cancel

- H**
- I**
- J**
- K**