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Carrier Testing as Distributor Guide

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Table of Contents

Introduction

This guide demonstrates the steps needed to access the Carrier Testing as a Distributor enhancement that became available in the FireLight® 2.16 release.

Carrier Setup

Enable Distributor Testing

In FireLight Admin on the **Groups** page, select the group **Name** and **TC Role Code** to do the testing and select the **Enable Distributor Testing View** check box in the **Testing** section as shown below.
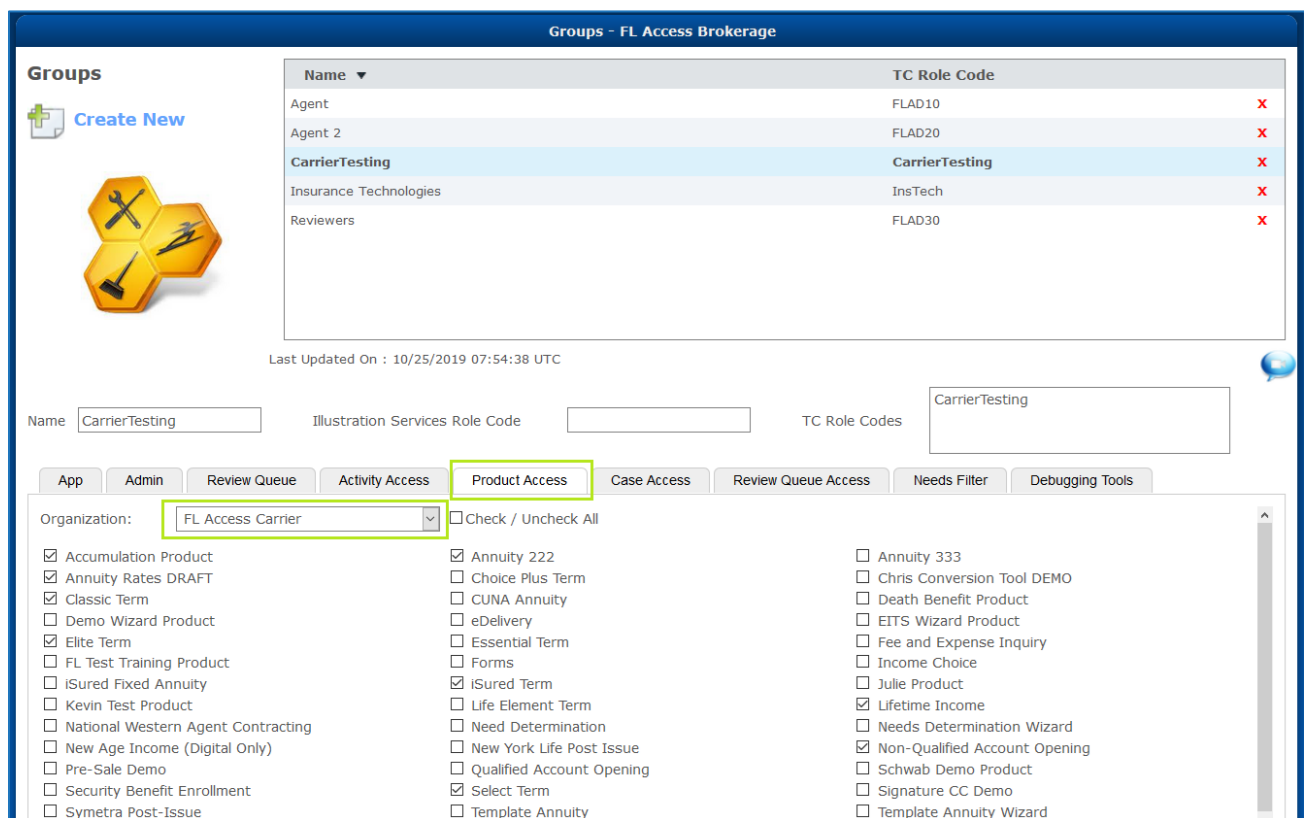
Distributor Setup

1. Distributors need to create the Carrier Testing Group. In FireLight Admin/Organization Configuration/**Groups** page, create a generic Carrier Testing group and enter a **Name** and **TC Role Code** for the group.

   NOTE: If a carrier testing group already exists, another one does not need to be created.

2. On the **Product Access** tab, select the check boxes for the product access per selling organization for the carrier testing group as shown below.

3. On the **Activity Access** tab, select all of the applicable activities to be used in carrier testing as shown below.

4. Distributors need to **Enable the Carrier Testing View.** In FireLight Admin/Organization Configuration/**Organization Settings** page on the **Activity** tab, select the **Enable Carrier Testing View** check box, which enables the associated dropdown list. In the dropdown list, select the Group that was created for carrier testing as shown below.

FL Access Brokerage

Last Updated: 10/25/2019 7:48 PM UTC   **NOTE:** Items marked with * are not included in deployments for Organization Sync Scope

Mobile Configuration   Maintain Devices*

| Organization | Security | Activity | Signature | Admin |

Edit Masks **Add**   None

E-Delivery Reminder Frequency   Weekly

Expiration Reminder Frequency   Weekly

Submit Reminder Frequency   Never

E-Delivery Expiration Warning Threshold   5   days (0 for never)

Expiration Warning Threshold   0   days (0 for never)

Maximum Upload File Size   20   MB

Requests Timeout   15   days (0 for never)

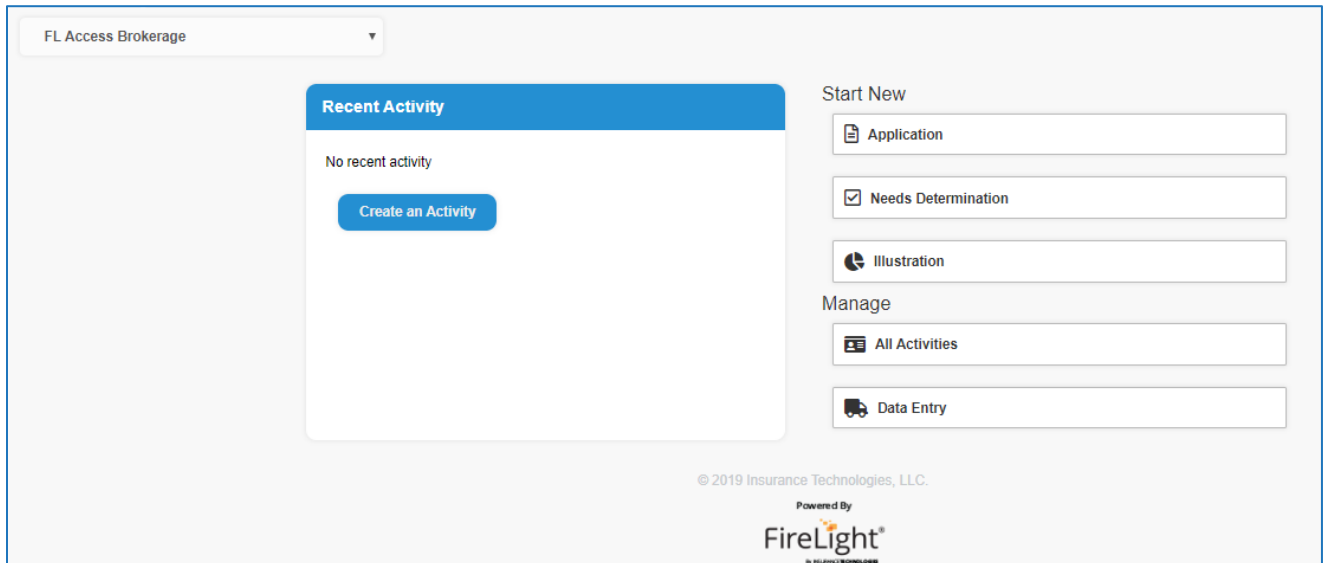Allow Client E-Fill ☑   Allow Client Fill & Sign ☑

Allow NIGO Printing ☑   Use DMARC ☐

Prevent Email Editing ☐   Print Submitted Only ☐

Enable Carrier Testing View ☑

CarrierTesting

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Carrier Testing in a Distributor Environment

1. Carriers log in to FireLight using their carrier group Name/TC Role Code. When the carrier selects the distributor to test, FireLight transitions the user into the Distributor group Name/TC Role Code that was enabled for the Distributor Testing View.

   NOTE: This list contains the distributors with whom the carrier has active selling agreements that have created a carrier testing group and enabled carrier testing in their environment. When selecting a distributor, the carrier sees only their carrier products in the distributor environment. FireLight filters for the originating carrier and shows only those products.

2. FireLight transitions from the logged in Carrier Group to the Distributor Testing Group in the distributor environment.