



# Carrier Testing as Distributor Guide

The firelight logo is located in the middle right section. It features the word "firelight" in a black, lowercase, sans-serif font. A small orange hexagon is positioned to the right of the letter "t".

firelight

## **CARRIER TESTING AS DISTRIBUTOR GUIDE**

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# 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.

The screenshot shows the 'Groups - FL Access Carrier' page in FireLight Admin. The 'Insurance Technologies' group is selected, and the 'InsTech' TC Role Code is entered. The 'Testing' section is expanded, and the 'Enable Distributor Testing View' checkbox is checked and highlighted with a green box.

Name	TC Role Code	
Agent	FLA10	X
Default	Default	X
Firm Admin/Support	FLA25	X
Insurance Technologies	InsTech	X
Registered Representative	FLA20	X
Reviewing Principal	FLA30	X
Test	123	X
UNICO	UNICO	X

Last Updated On : 10/23/2019 03:22:47 UTC

Name: Insurance Technologies Illustration Services Role Code: TC Role Codes: InsTech

App Admin Review Queue Activity Access Product Access Case Access Review Queue Access Needs Filter Debugging Tools

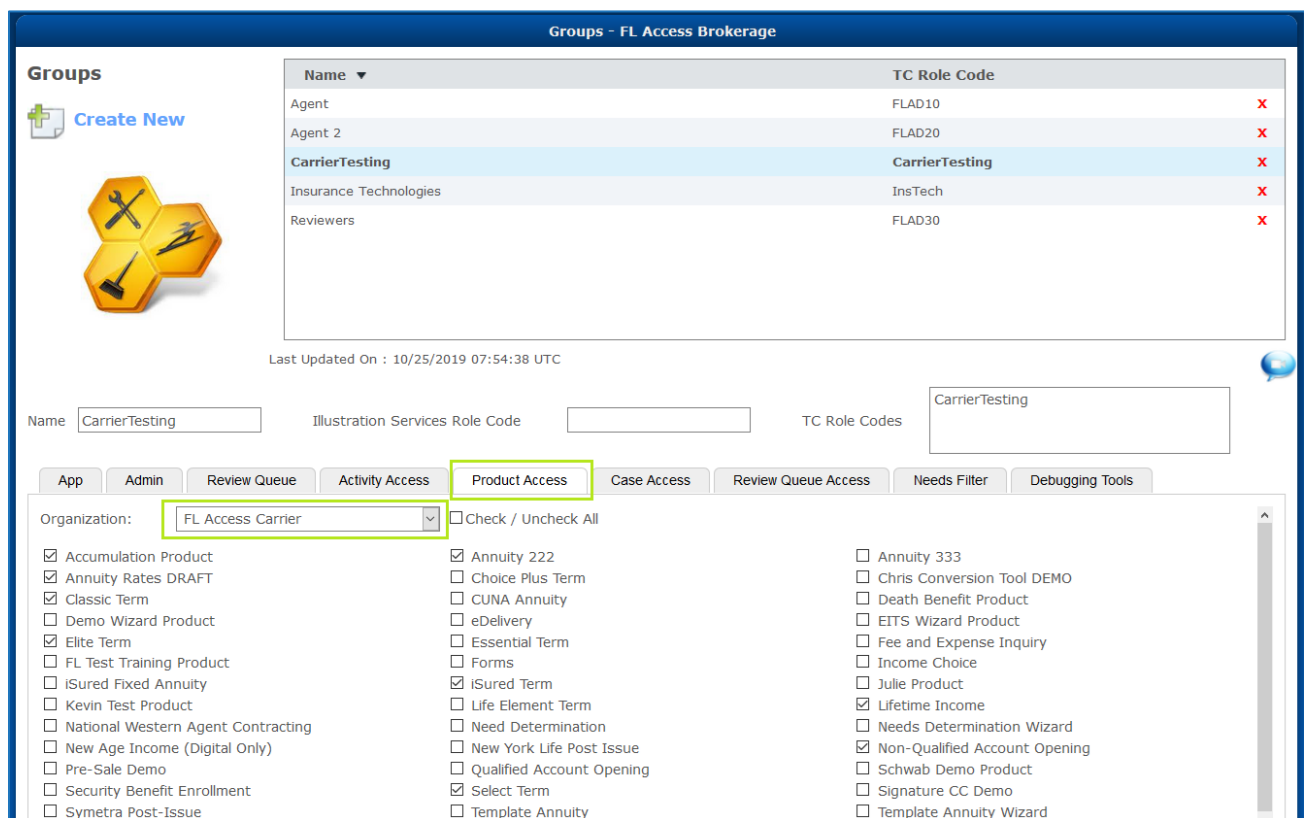
**Enable Distributor Testing View**

## 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.



**Groups - FL Access Brokerage**

**Groups**

Create New

Name	TC Role Code	
Agent	FLAD10	X
Agent 2	FLAD20	X
<b>CarrierTesting</b>	<b>CarrierTesting</b>	X
Insurance Technologies	InsTech	X
Reviewers	FLAD30	X

Last Updated On : 10/25/2019 07:54:38 UTC

Name: CarrierTesting Illustration Services Role Code: TC Role Codes: CarrierTesting

App Admin Review Queue Activity Access **Product Access** Case Access Review Queue Access Needs Filter Debugging Tools

Organization: FL Access Carrier

☐ Check / Uncheck All

<input checked="" type="checkbox"/> Accumulation Product	<input checked="" type="checkbox"/> Annuity 222	<input type="checkbox"/> Annuity 333
<input checked="" type="checkbox"/> Annuity Rates DRAFT	<input type="checkbox"/> Choice Plus Term	<input type="checkbox"/> Chris Conversion Tool DEMO
<input checked="" type="checkbox"/> Classic Term	<input type="checkbox"/> CUNA Annuity	<input type="checkbox"/> Death Benefit Product
<input type="checkbox"/> Demo Wizard Product	<input type="checkbox"/> eDelivery	<input type="checkbox"/> EITS Wizard Product
<input checked="" type="checkbox"/> Elite Term	<input type="checkbox"/> Essential Term	<input type="checkbox"/> Fee and Expense Inquiry
<input type="checkbox"/> FL Test Training Product	<input type="checkbox"/> Forms	<input type="checkbox"/> Income Choice
<input type="checkbox"/> iSured Fixed Annuity	<input checked="" type="checkbox"/> iSured Term	<input type="checkbox"/> Julie Product
<input type="checkbox"/> Kevin Test Product	<input type="checkbox"/> Life Element Term	<input checked="" type="checkbox"/> Lifetime Income
<input type="checkbox"/> National Western Agent Contracting	<input type="checkbox"/> Need Determination	<input type="checkbox"/> Needs Determination Wizard
<input type="checkbox"/> New Age Income (Digital Only)	<input type="checkbox"/> New York Life Post Issue	<input checked="" type="checkbox"/> Non-Qualified Account Opening
<input type="checkbox"/> Pre-Sale Demo	<input type="checkbox"/> Qualified Account Opening	<input type="checkbox"/> Schwab Demo Product
<input type="checkbox"/> Security Benefit Enrollment	<input checked="" type="checkbox"/> Select Term	<input type="checkbox"/> Signature CC Demo
<input type="checkbox"/> Symetra Post-Issue	<input type="checkbox"/> Template Annuity	<input type="checkbox"/> Template Annuity Wizard

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

## Groups

[Create New](#)

Name ▼	TC Role Code	
Agent	FLAD10	X
Agent 2	FLAD20	X
<b>CarrierTesting</b>	<b>CarrierTesting</b>	X
Insurance Technologies	InsTech	X
Reviewers	FLAD30	X

Last Updated On : 10/25/2019 07:54:38 UTC

Name
CarrierTesting

Illustration Services Role Code

TC Role Codes
CarrierTesting

App
Admin
Review Queue
**Activity Access**
Product Access
Case Access
Review Queue Access
Needs Filter
Debugging Tools

☐ Check / Uncheck All

☐ Account Opening
☐ Fee Inquiry
☒ Needs Determination
☐ Quote

☒ Application
☐ Guided Illustration
☐ Post Issue
☐ SubPay

☐ E-Delivery
☒ Illustration
☐ Print Forms

**Illustration**
☐ Enable Illustration Send Email

Illustration Email Expiration
3
days

- 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](#)

E-Delivery Reminder Frequency

Expiration Reminder Frequency

Submit Reminder Frequency

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

Expiration Warning Threshold  days (0 for never)

Maximum Upload File Size  MB

Requests Timeout  days (0 for never)

Allow Client E-Fill ☒ Allow Client Fill & Sign ☒

Allow NIGO Printing ☒ Use DMARC ☐

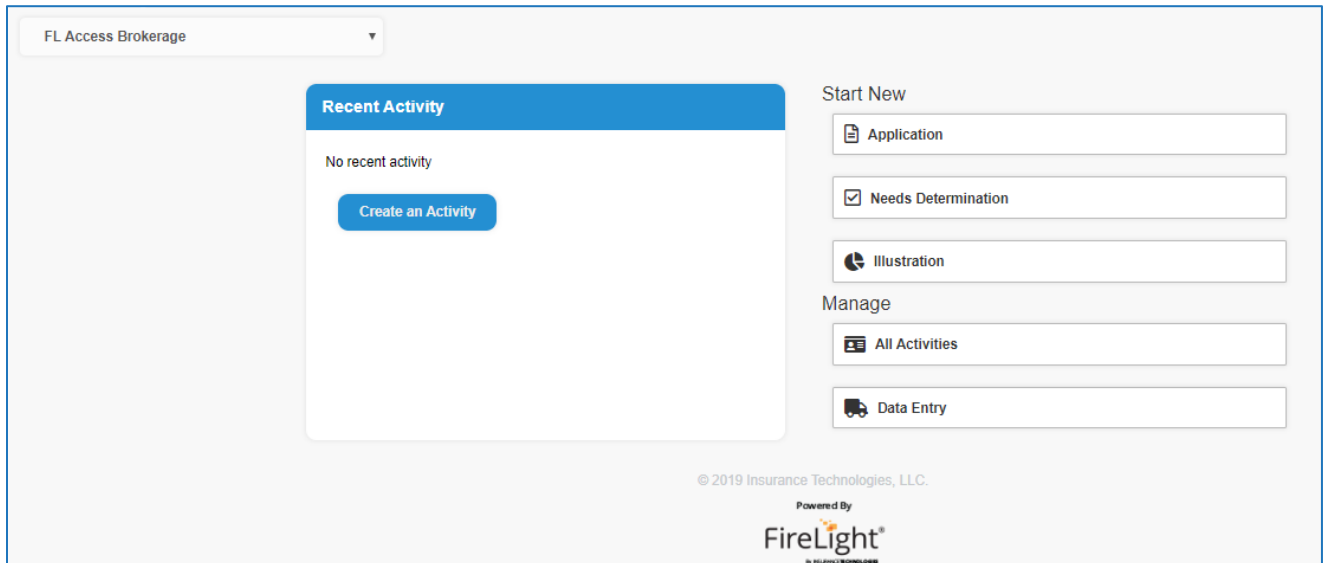
Prevent Email Editing ☐ Print Submitted Only ☐

Enable Carrier Testing View ☒

## 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.



The screenshot displays the FireLight user interface. At the top left, there is a dropdown menu labeled 'FL Access Brokerage'. The main content area is divided into two columns. The left column features a blue header 'Recent Activity' above a white box containing the text 'No recent activity' and a blue button labeled 'Create an Activity'. The right column has a 'Start New' section with three input fields: 'Application' (with a document icon), 'Needs Determination' (with a checked checkbox icon), and 'Illustration' (with a pie chart icon). Below this is a 'Manage' section with two input fields: 'All Activities' (with a list icon) and 'Data Entry' (with a truck icon). At the bottom center, the text '© 2019 Insurance Technologies, LLC.' is displayed above the 'Powered By FireLight' logo, which includes the tagline 'BY INSURANCE TECHNOLOGIES, LLC.'.

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