



Configurable Pre-Sale Guide

FireLight®

**CONFIGURABLE
PRE-SALE GUIDE**

FireLight®

6/11/2024

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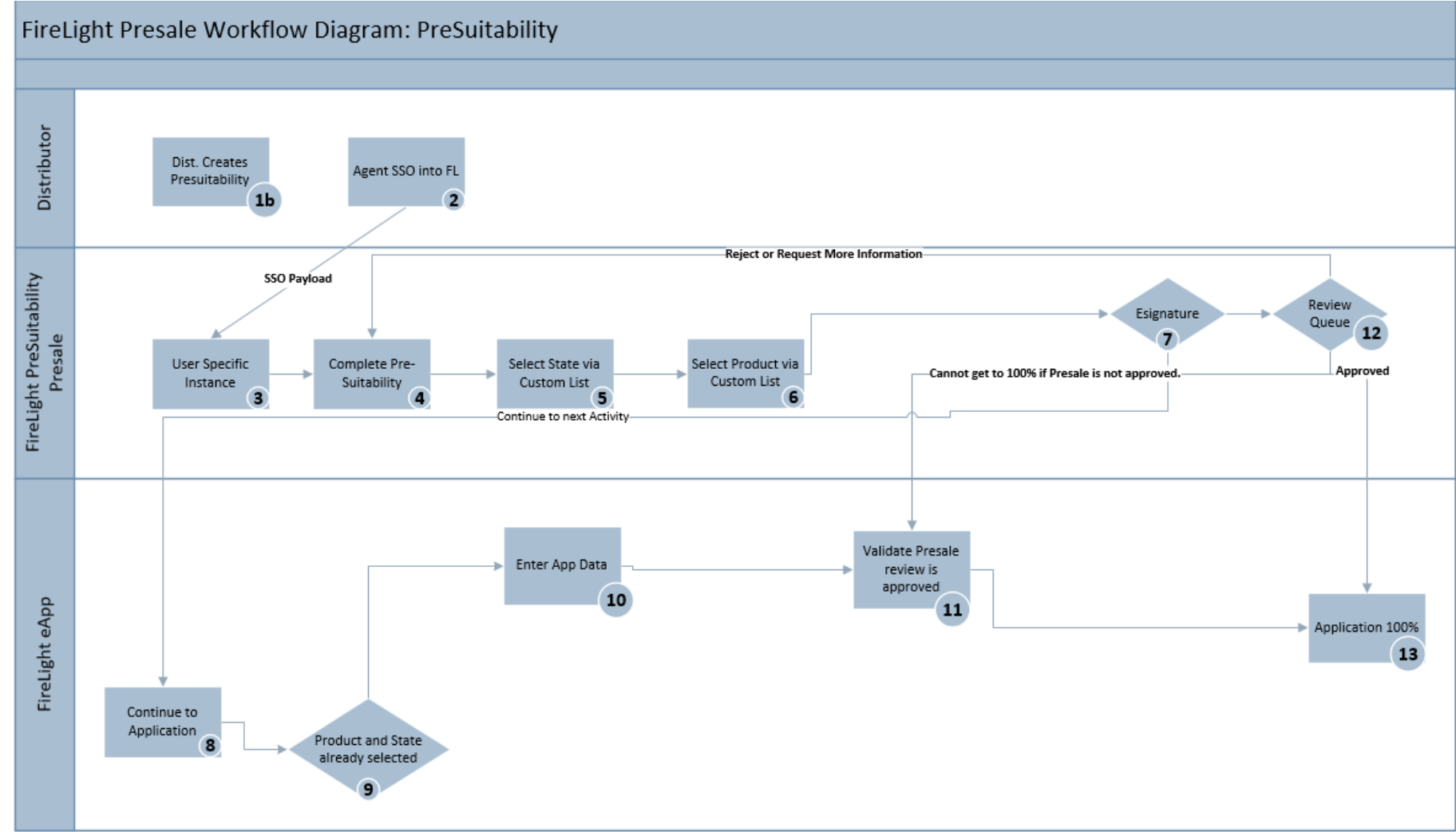
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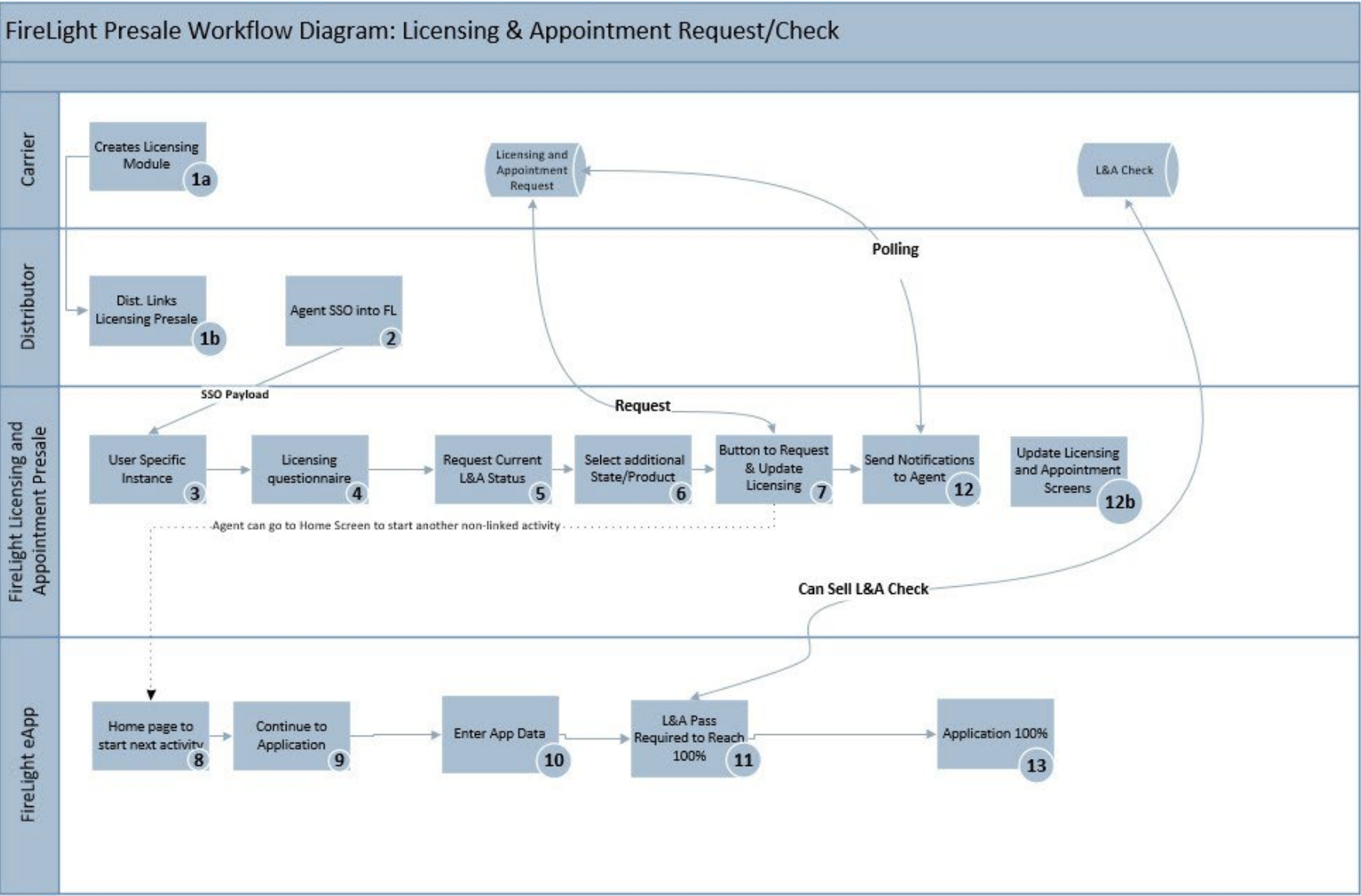
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FireLight® Pre-Sale Diagrams

FireLight® supports three different workflows that reflect the aspects of a presale case. Following is a Visio of the workflow options.





Admin Basics for Setting Up Pre-Sale

Pre-Sale is creating a new activity that will precede a following activity. Several places within the Admin allow configurability to the pre-sale. This section details each one.

Activity Detail

Activity Name

The Activity Name can be configured to a business need. This allows the user to name their activity specific to what they're trying to accomplish. When adding a new Activity, this will need to be altered.

ACORD Type

ACORD Type drives the activity and associates it with Products, Packages, and the Sales Agreements. This has replaced the Transaction Type from previous releases and makes an activity and package accessible to both a carrier and distributor. The type chosen will reflect the ACORD value associated with it.

ACORD Type	Needs Determination (116-11600)	<input type="button" value="v"/>
------------	---------------------------------	----------------------------------

Activity Type

This feature is attached to the ACORD Type and is locked down as it cannot be altered.

Branding Icon

The icon reflected in FireLight® can be configured by the client. The icons are featured from FontAwesome, and a link is provided to view each professional icon. The textbox can be altered, and the name of the icon will need to be entered to display the chosen icon.

Branding Icon (Font Awesome Icons)	<input type="text" value="check-square-o"/>	<input checked="" type="checkbox"/>
--	---	-------------------------------------

Continue/Apply Button

A value can be entered to customize the label of the Continue button.

Continue/Apply Label	<input type="text" value="Apply"/>
----------------------	------------------------------------

Allow Pre/Post Signature Review

These checkboxes are mutually exclusive and allow for a pre-signature or a post-signature pre-submission review. This option can be chosen along with a post-submission review.

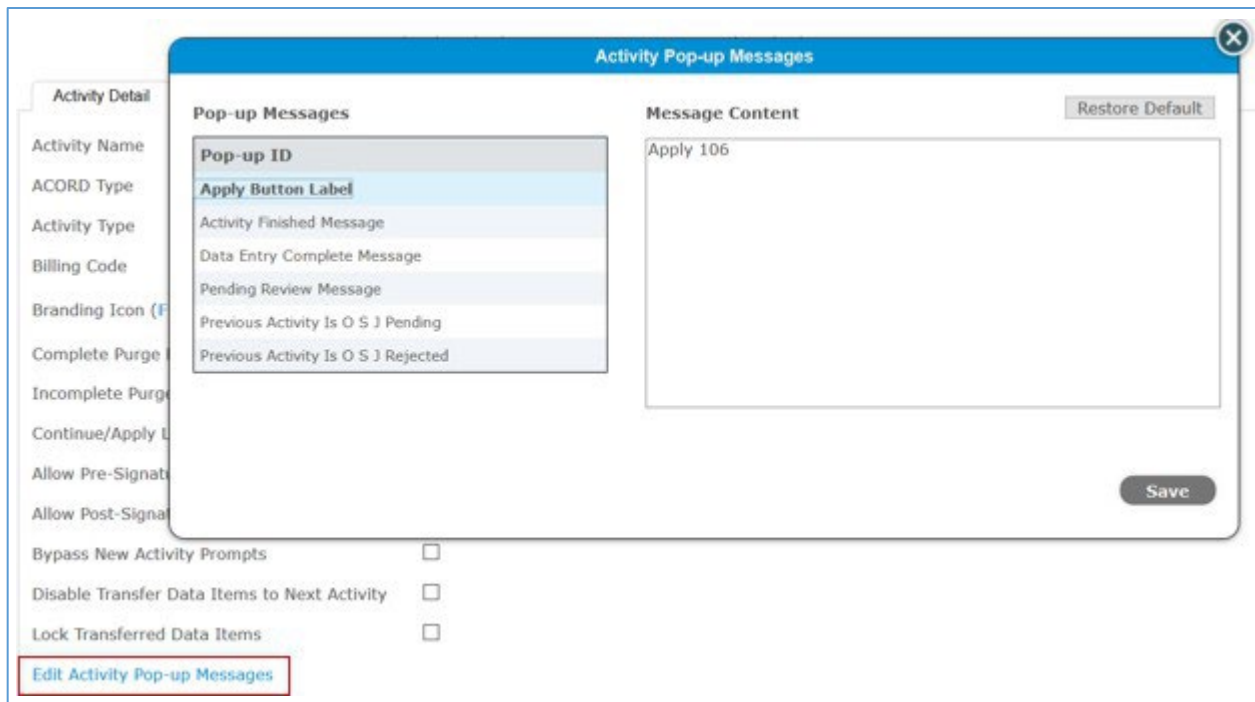
Bypass New Activity Prompts

This feature allows you to skip choosing the jurisdiction and product if there is only one product and one carrier set to this activity. This feature applies only to the initial activity. For example, if there was only one Needs Determination listed for the Activity, then once selected in FireLight® it will immediately launch the forms listed:

The screenshot displays the FireLight interface. At the top, under 'Start New', there are four buttons: 'Licensing', 'New Business', 'Quote', and 'Client Questionnaire'. The 'Client Questionnaire' button is selected, indicated by a checkmark and a mouse cursor. Below this is a progress bar with four steps: 1. DATA ENTRY (95%), 2. SIGNATURES, 3. REVIEW, and 4. FINALIZE. A 'CONTINUE' button is located to the right of the progress bar. The main content area features the Sured logo and a section titled 'Client Information' with a question mark icon.

Edit Activity Pop-up Messages

Select pop-up and toast messages can be customized based on the client's business need. If a user wants to return to the default message, a selection can be made to change the message. These messages are cached, so it will take 20 minutes for changes to be reflected.



Activity Pop-up Messages

Activity Detail

Activity Name

ACORD Type

Activity Type

Billing Code

Branding Icon (F)

Complete Purge

Incomplete Purge

Continue/Apply L

Allow Pre-Signat

Allow Post-Signat

Bypass New Activity Prompts ☐

Disable Transfer Data Items to Next Activity ☐

Lock Transferred Data Items ☐

[Edit Activity Pop-up Messages](#)

Pop-up Messages

Pop-up ID	Apply Button Label
Activity Finished Message	
Data Entry Complete Message	
Pending Review Message	
Previous Activity Is O S J Pending	
Previous Activity Is O S J Rejected	

Message Content

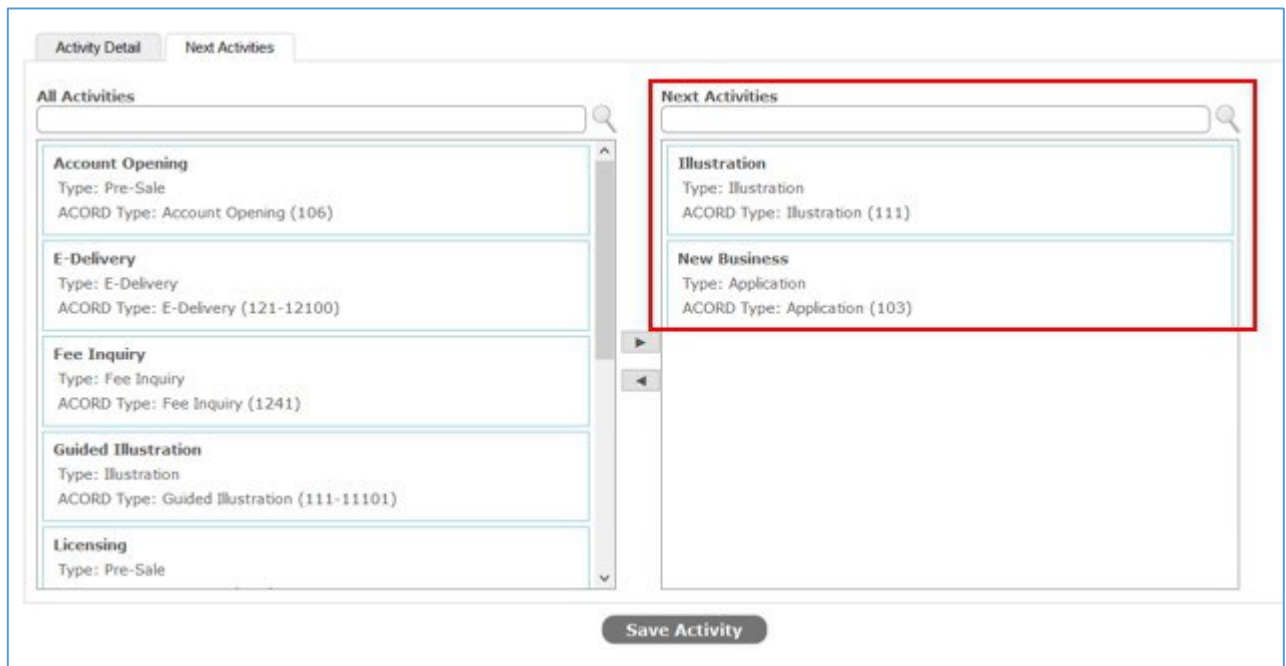
Apply 106

Restore Default

Save

Next Activity

Add in the Next activities that will be associated with the Pre-sale. Multiple next activities can be associated with the Pre-sale and will be displayed once the Pre-sale activity has been submitted.



Activity Detail

Next Activities

All Activities

Account Opening
Type: Pre-Sale
ACORD Type: Account Opening {106}

E-Delivery
Type: E-Delivery
ACORD Type: E-Delivery {121-12100}

Fee Inquiry
Type: Fee Inquiry
ACORD Type: Fee Inquiry {1241}

Guided Illustration
Type: Illustration
ACORD Type: Guided Illustration {111-11101}

Licensing
Type: Pre-Sale

Next Activities

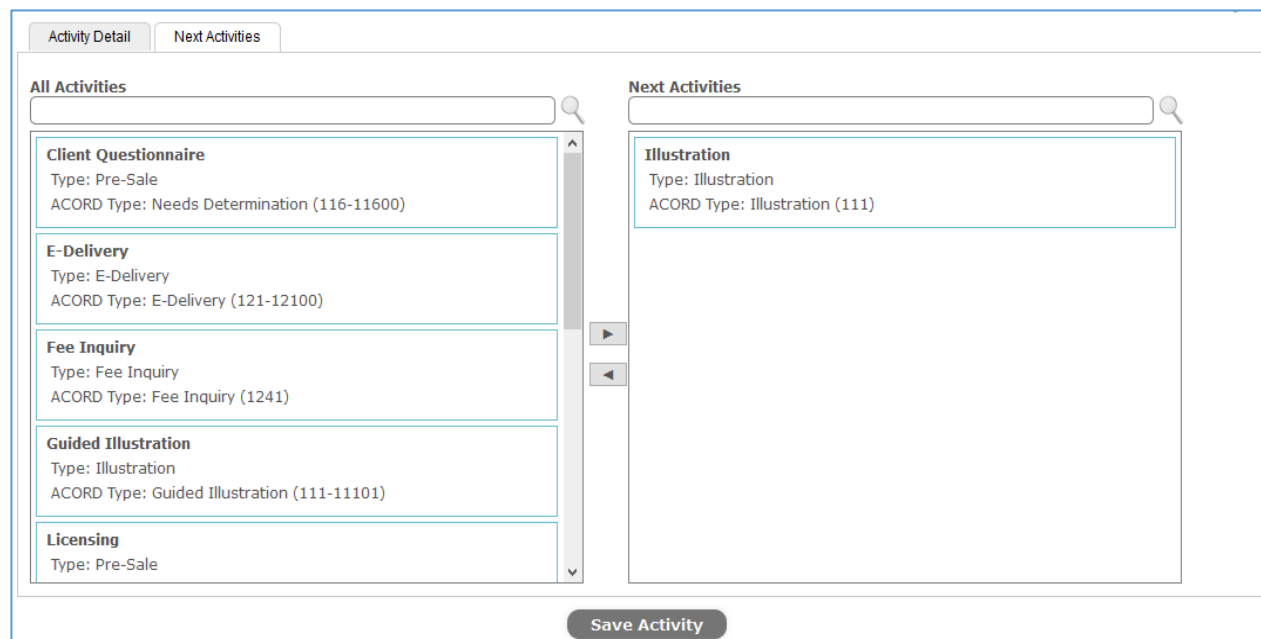
Illustration
Type: Illustration
ACORD Type: Illustration {111}

New Business
Type: Application
ACORD Type: Application {103}

Save Activity

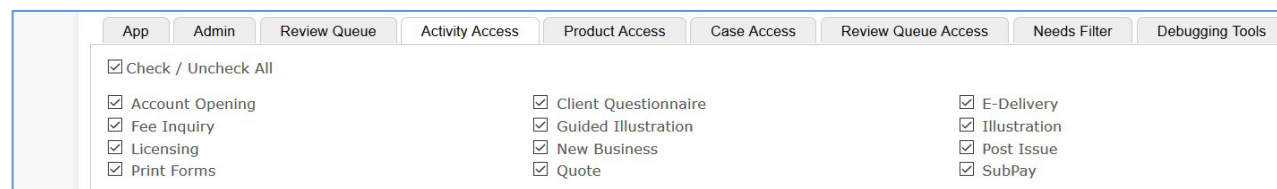
If only one Activity is selected for the Next Activity, and only one product is associated with that Activity, it will bypass the Jurisdiction and Product type menu and open up the next Activity

without displaying the menu. If there are multiple products associated with the next activity, the normal FireLight® prompts will appear.



Groups

To have the Pre-sale activity visible, it will need to be selected for each role code in the Activity tab.

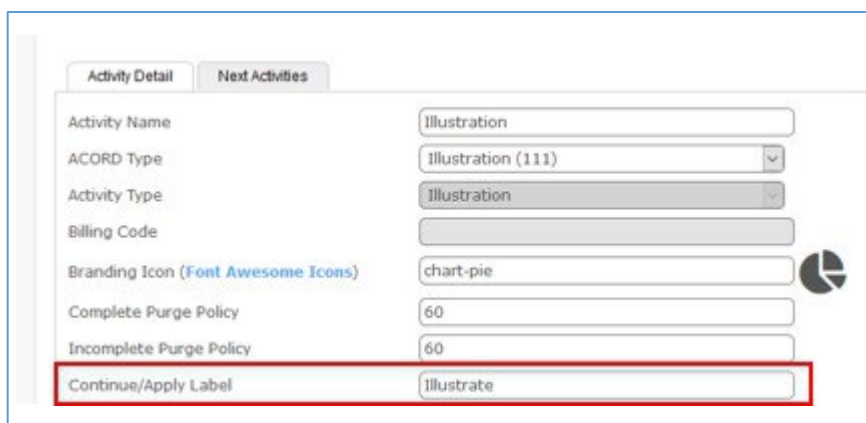


App	Admin	Review Queue	Activity Access	Product Access	Case Access	Review Queue Access	Needs Filter	Debugging Tools
<input checked="" type="checkbox"/> Check / Uncheck All								
<input checked="" type="checkbox"/> Account Opening	<input checked="" type="checkbox"/> Client Questionnaire	<input checked="" type="checkbox"/> E-Delivery						
<input checked="" type="checkbox"/> Fee Inquiry	<input checked="" type="checkbox"/> Guided Illustration	<input checked="" type="checkbox"/> Illustration						
<input checked="" type="checkbox"/> Licensing	<input checked="" type="checkbox"/> New Business	<input checked="" type="checkbox"/> Post Issue						
<input checked="" type="checkbox"/> Print Forms	<input checked="" type="checkbox"/> Quote	<input checked="" type="checkbox"/> SubPay						

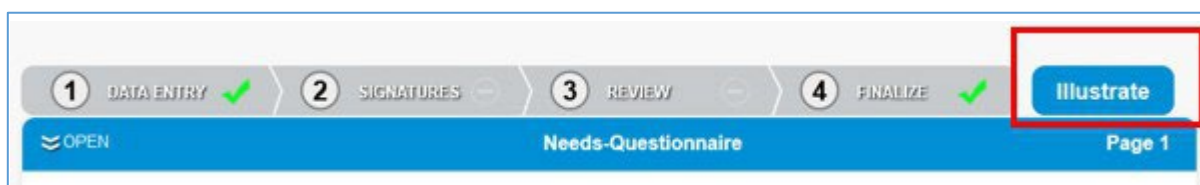
Setting Up Workflows

Using Buttons to Drive Next Activity

Buttons can be edited to lead the user to the next desired activity. This is located within the Activities section of the Product Config tab in the Admin App. Under Activity Detail, the Continue/Apply Label can be configured to reflect the activity that needs to occur. An example could be Illustration. In this example, "Illustrate" is used as the label and reflects in FireLight® once an Activity has been completed:



Activity Detail	Next Activities
Activity Name	Illustration
ACORD Type	Illustration (111)
Activity Type	Illustration
Billing Code	
Branding Icon (Font Awesome Icons)	chart-pie
Complete Purge Policy	60
Incomplete Purge Policy	60
Continue/Apply Label	Illustrate



1 DATA ENTRY

2 SIGNATURES

3 REVIEW

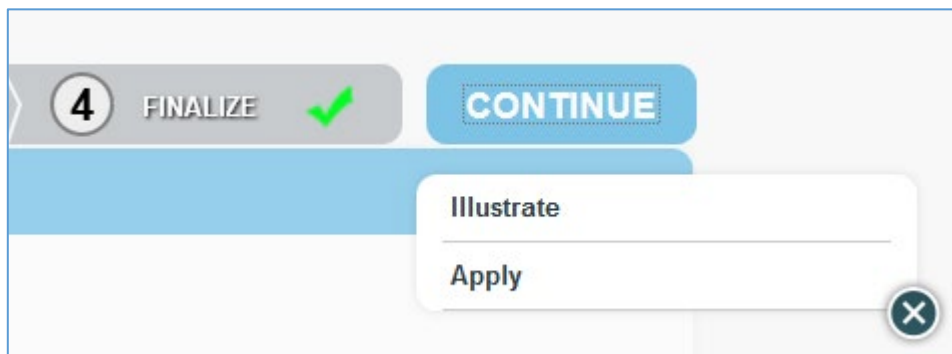
4 FINALIZE

Illustrate

Needs-Questionnaire

Page 1

If more than one activity is listed in the Next Activity list, there will be a dropdown displaying the choices:



4 FINALIZE

CONTINUE

Illustrate

Apply

There is no limit on how many activities can be added to the Next Activities list.

Select Jurisdiction and Product Inside of Pre-Sale and Move into Application

The product and state selected in the pre-sale option can be set up to prefill for the next activity. Two FireLight® global data items need to be set on the parent activity:

FLI_NEXT_ACTIVITY_PRODUCT_CUSIP and FLI_NEXT_ACTIVITY_JURISDICTION. These data values can be collected in input controls (dropdown lists or custom lists). In the pre-sale activity, set the

data items, and then use these values for the subsequent application. If the values are specified and available, the user will automatically move into the next activity with these values

Example using dropdown lists:

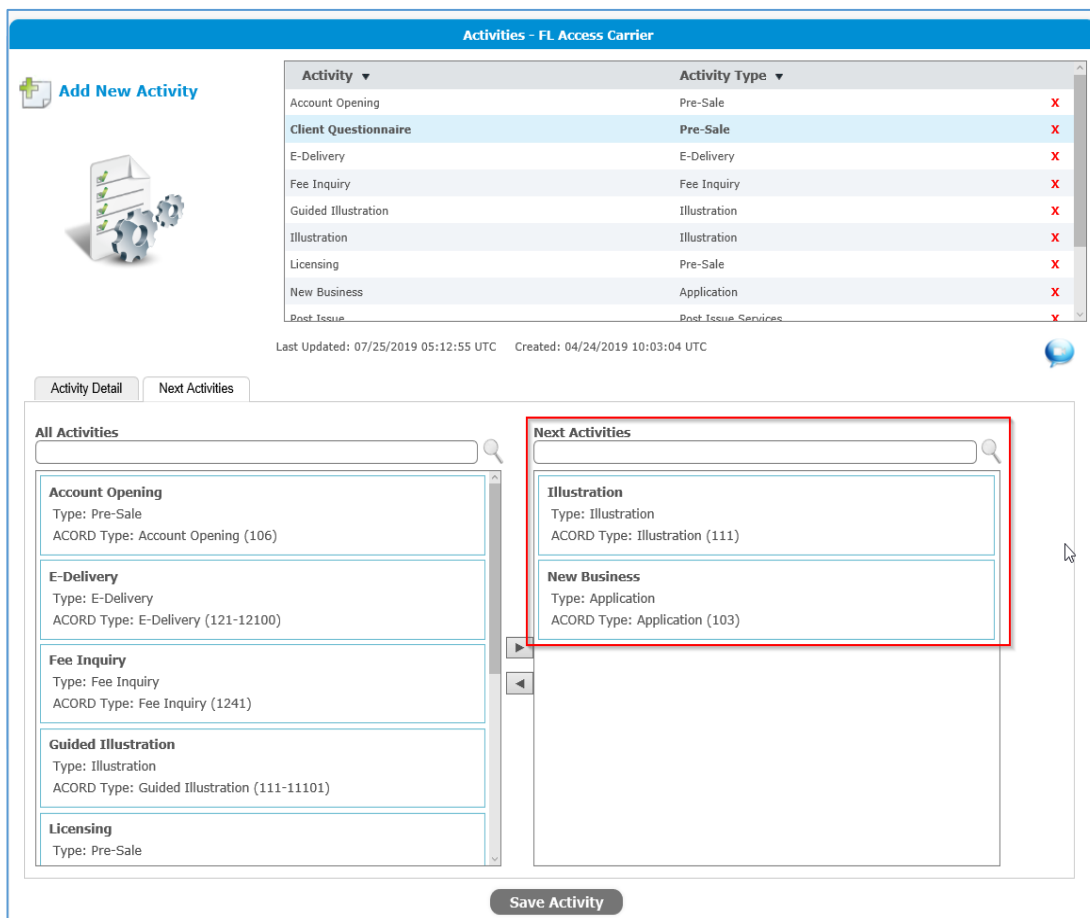
The image displays two side-by-side screenshots of the 'Field Properties' dialog box, which is used for configuring data items. Both dialog boxes have a blue header with the title 'Field Properties' and a close button (X) in the top right corner.

Left Screenshot: The 'Name' field is set to 'FLI_NEXT_ACTIVITY_JURISDICT'. The 'Top, Left' coordinates are 781 and 41. The 'Width, Height' are 70 and 18. The 'Text' field is set to 'Jurisdiction'. The 'Protection' is set to 'None'. The 'Data Group' is set to 'None'. The 'Global Scope' checkbox is checked. The 'Exclude from PDF' checkbox is checked. The 'Z Order' buttons are 'Bring to Front' and 'Send to Back'. The 'Update' and 'Close' buttons are at the bottom. Below the dialog box, a dropdown menu is open, showing 'Jurisdiction' as the selected item. Below that, a text box contains 'FLI_NEXT_ACTIVITY_JURISDICTION_LABEL'.

Right Screenshot: The 'Name' field is set to 'FLI_NEXT_ACTIVITY_PRODUCT_'. The 'Top, Left' coordinates are 820 and 41. The 'Width, Height' are 70 and 18. The 'Text' field is set to 'Product'. The 'Protection' is set to 'None'. The 'Data Group' is set to 'None'. The 'Global Scope' checkbox is checked. The 'Exclude from PDF' checkbox is checked. The 'Z Order' buttons are 'Bring to Front' and 'Send to Back'. The 'Update' and 'Close' buttons are at the bottom. Below the dialog box, a dropdown menu is open, showing 'Product' as the selected item. Below that, a text box contains 'FLI_NEXT_ACTIVITY_PRODUCT_CUSIP_LABEL'.

Setting the data item to an ACORD value:

Note: The State code will need to be added as the export value to execute this action.



Activity	Activity Type	
Account Opening	Pre-Sale	X
Client Questionnaire	Pre-Sale	X
E-Delivery	E-Delivery	X
Fee Inquiry	Fee Inquiry	X
Guided Illustration	Illustration	X
Illustration	Illustration	X
Licensing	Pre-Sale	X
New Business	Application	X
Post Issue	Post Issue Services	X

Last Updated: 07/25/2019 05:12:55 UTC Created: 04/24/2019 10:03:04 UTC

Activity Detail Next Activities

All Activities

Account Opening
Type: Pre-Sale
ACORD Type: Account Opening (106)

E-Delivery
Type: E-Delivery
ACORD Type: E-Delivery (121-12100)

Fee Inquiry
Type: Fee Inquiry
ACORD Type: Fee Inquiry (1241)

Guided Illustration
Type: Illustration
ACORD Type: Guided Illustration (111-11101)

Licensing
Type: Pre-Sale

Next Activities

Illustration
Type: Illustration
ACORD Type: Illustration (111)

New Business
Type: Application
ACORD Type: Application (103)

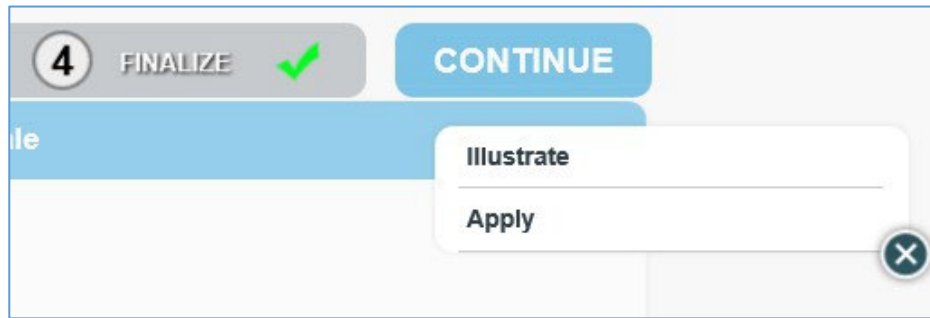
Save Activity

When there is more than one ACORD type listed for the next activity, a dropdown is presented upon pre-sale completion for the user to select which activity they would like to complete next. Once the activity is chosen from the dropdown, the user will be routed to the product chosen from the CUSIP.

If the selections are not valid, the user does not have access to create the product and jurisdiction, or the steps are not taken to set the next activity jurisdiction and product, FireLight® displays a message to the user and the user needs to go through the normal activity creation workflow. In the Admin Help, see FLI_NEXT_ACTIVITY_PRODUCT_CUSIP and FLI_NEXT_ACTIVITY_JURISDICTION in the "Common Tags" topic, CommonTags.xlsx spreadsheet for more information.

Using Rules and Next Activity Options

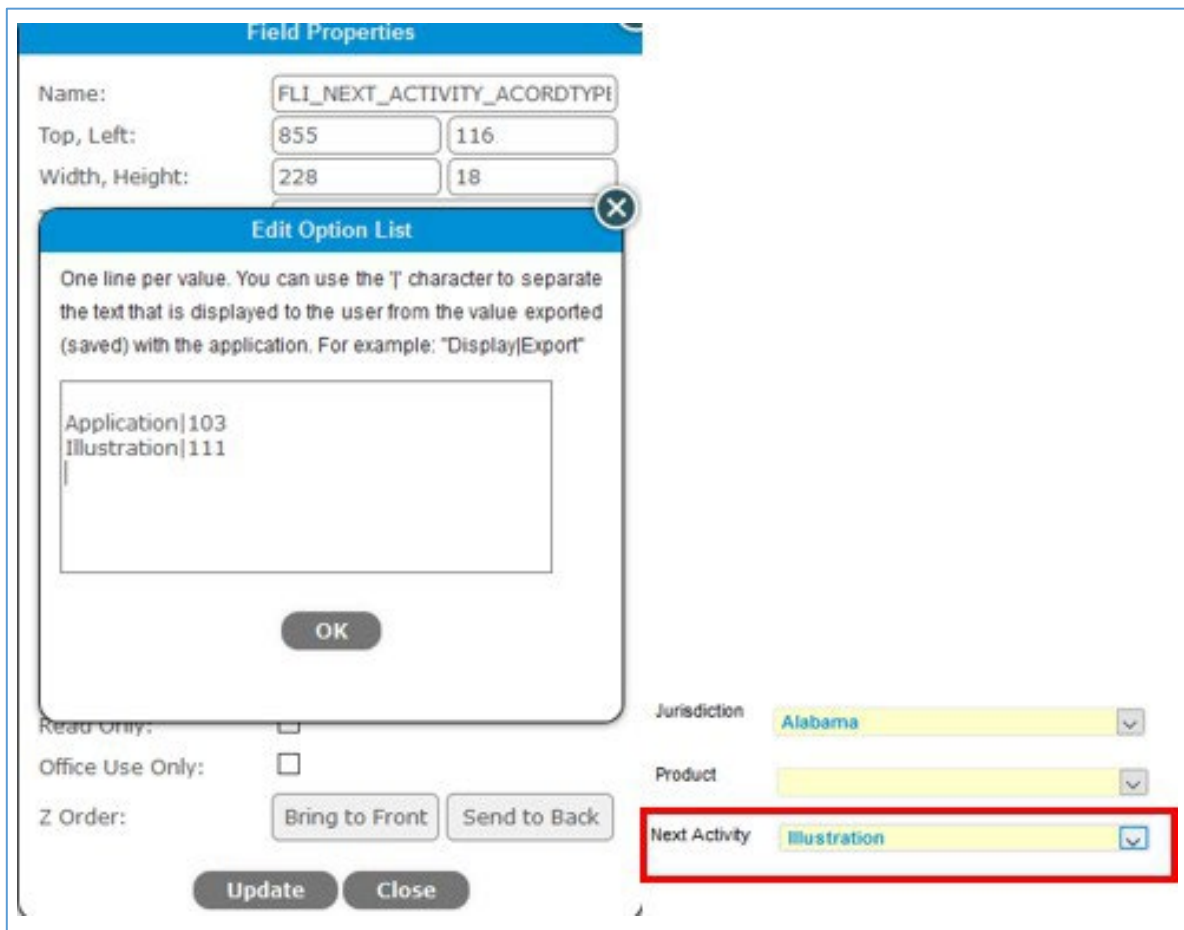
A new dataitem has been created to reflect the Next Activity through ACORD type. This is FLI_NEXT_ACTIVITY_ACORDTYPE, and this dataitem can be utilized to specify the next Activity.

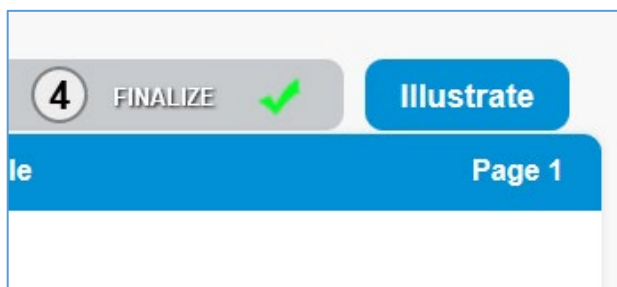


For example, to have an illustration show for the next activity when multiple activities are listed, add the following rule:

```
<diset dataitemid="FLI_NEXT_ACTIVITY_ACORDTYPE">
  <const value="111" type="String" />
</diset>
```

Even though there are multiple activities listed within the field properties, the rule will designate the activity reflected.





Using the Needs Filter through Pre-Sale

The Needs filter can be used to create a greater filter for the pre-sale activities. Within the groups tab, the Needs filter can filter certain next activity products based on data items and export values.

An example would be if a product needed to be filtered based on the Owner's age. The age would be added along with the products needing to be filtered down:

Upload		Organization:	FL Access Carrier	New Category
Filter Type	New Filter Category			
Data Item ID	ValueLessThanX			
X Lifetime Income	Owner_Age			
X Abi and Julie's Test Product	40			
X Annuity 222	60			
X Accumulation Product	50			
X Annuity 333	50			
X CUNA Annuity	50			
X Death Benefit Product	50			

Once the value is entered into the pre-sale and the user is advanced to the next activity, the Needs filter will show the products they are allowed to select based on the query.

Create New New Business

Jurisdiction: Alabama
Product Type: Annuity
Carrier: Select Carrier

Override Date: 07/30/2019

Annuity	FL Access Carrier	Abi and Julie's Test Product
Annuity	FL Access Carrier	FL Test Training Product
Annuity	FL Access Carrier	New Age Income (Digital Only)
Annuity	FL Access Carrier	RW Testing for Upload PDF
Annuity	FL Access Carrier	Template Annuity
Annuity	FL Access Carrier	Template Annuity Wizard
Annuity	FL Access Carrier	VA Annuity

Please Note: The Needs filter is based on the selected role code, so multiple filters can be created if there are multiple role codes.

For more direction on the Needs filter, please see the Admin Help.

The Deployment Process

When deploying a Pre-Sale either into the higher environments like Staging and Production or deploying into a distributor environment, there is not much of a change with the current deployment process. The difference is the configuration for activities. For both carriers and distributors, the activity name will have to be created.

If a carrier is deploying to a distributor, the current process of pairing the package to the product for that selling organization is the same within the Sales Agreement; however, the defining item is that the package is set by the ACORD Type that is the same as the Activity.

Package Detail
Forms/Wizards In Package
Rule Sets In Package

Package Name Contracting

ACORD Type Licensing (129)


Area Type Activity

Role Codes

Add Standard
Api Role

Sales Agreements

FL Access Carrier



Product	Agreement	
Abi and Julie's Test Presale	False	X
Abi and Julie's Test Product	False	X
Accumulation Product	True	X
Annuity 222	True	X
Annuity 333	False	X
Chris Conversion Tool DEMO	False	X
Client Questionnaire	False	X
Contracting and Appointment	True	X
CLIMA Annuity	False	X

Sales Agreement of "FL Access Carrier" for product "Contracting and Appointment"

Selling Org: FL Access Brokerage

Product Name:

More Info:

Start: End:

Time Zone:

Replace Product: Select Replaced Product

Illust Services Role:

Last Updated: 8/1/2019 4:52 PM UTC

State Approvals
Back Office Script
Options

State	Approved
Alabama	<input checked="" type="checkbox"/>
Alaska	<input checked="" type="checkbox"/>
Arizona	<input checked="" type="checkbox"/>
Arkansas	<input checked="" type="checkbox"/>
California	<input checked="" type="checkbox"/>
Colorado	<input checked="" type="checkbox"/>

☒ Check/Uncheck All

Available Packages

Assigned Packages

Contracting
PreSale
Package Duty: Required

Save Sales Agreement

While the activity is not deployed to distributors, the product and package are and will be tied to the distributor's activity through the ACORD Type. This gives the distributor the opportunity to name the Activity according to their business needs but still tie the carrier's product and package to it.

Deploy - FL Access Carrier

Synchronization Scope: Distributor All Configuration Reason:

Deployment History

Type here to filter by organization or description Check/Uncheck All ☐ ☐ Correct Out-of-Sync Environments

Description	Organization	Deploy
Lifetime Income	Crump	<input type="checkbox"/>
Lifetime Income	Dease Test	<input type="checkbox"/>
Lifetime Income	FIDx	<input type="checkbox"/>
Accumulation Product	FL Access Brokerage	<input type="checkbox"/>
Annuity 222	FL Access Brokerage	<input type="checkbox"/>
Contracting and Appointment	FL Access Brokerage	<input checked="" type="checkbox"/>

Deploy Now

[View All Scheduled Deployments](#)

Schedule Deployment at (Mountain Time):

Schedule Deployment

Activity Detail Next Activities

Activity Name

ACORD Type Licensing (129)

Activity Type Pre-Sale

Billing Code

Branding Icon ([Font Awesome Icons](#))

Complete Purge Policy

Incomplete Purge Policy

Continue/Apply Label