

---

Deploy Custom Lists in All Configuration Scope

# FIRELIGHT BASE

---



Platform

**DEPLOY CUSTOM LISTS IN ALL CONFIGURATION SCOPE**

**Document Version: 1.0**

**Published: October 30, 2020**

**Insurance Technologies, LLC**

Copyright © 2020 Insurance Technologies, LLC, all rights reserved.

Insurance Technologies, ForeSight® and FireLight® are registered or unregistered trademarks of Insurance Technologies, LLC (IT) in the USA and/or other countries.

ACORD, ACORD ObjX, ACORD OLifE, AL3, ACORD Advantage, ACORD XML, and "Association for Cooperative Operations Research and Development" are registered or unregistered trademarks of ACORD Corporation in the USA and/or other countries.

Microsoft, Microsoft SQL Server, Microsoft Internet Information Server, Windows, and other Microsoft names and logos are either registered or unregistered trademarks of Microsoft Corporation in the U.S.A. and/or other countries.

All other trademarks are the property of their respective owners.

The information contained in this document is current as of the date of the publication. Because Insurance Technologies, LLC must respond to changing market conditions and technology advances, Insurance Technologies, LLC cannot guarantee the accuracy of any information presented after the date of publication.

INSURANCE TECHNOLOGIES, LLC MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, IN THIS DOCUMENT AND HEREBY DISCLAIMS ANY AND ALL SUCH WARRANTIES.

The material contained in this document is considered confidential and the intellectual property of Insurance Technologies, LLC. The recipient is given access to this material on the condition that the recipient (1) will keep the information confidential at all times, and (2) will not copy or modify or share the materials, except as expressly authorized by Insurance Technologies, LLC. The recipient should limit its disclosure of the information and materials only to its employees who have a clear business purpose and need to receive such information and materials and who are bound by confidentiality obligations to the recipient that are at least as protective of such information and materials as those contained herein.

**Insurance Technologies, LLC**

Two South Cascade Avenue  
Colorado Springs, CO 80903  
USA

Phone: 719.442.6400

FAX: 719.442.0600

Internet E-Mail: [info@insurancetechnologies.com](mailto:info@insurancetechnologies.com)

Website: <http://www.insurancetechnologies.com>

## Table of Contents

iConnect 215635 Design Approach – Deploy Custom Lists in All Configuration Scope .....	4
1 Enhance Sales Agreements to include Custom Lists Sub Tab.....	4
2 Include Custom Lists with All Configuration Deployment .....	7

# iConnect 215635 Design Approach – Deploy Custom Lists in All Configuration Scope

## Project Overview

Carriers are using custom lists in combination with rules in FireLight to control allocations as it gives greater flexibility to manage distributor variations and date drive changes. Custom lists are not included in the "All Configuration" deployment, which has led to production issues because distributors didn't deploy the lists. There are some carriers who intentionally do not deploy all custom lists to all distributors. Enhancements will be made to the sales agreement to allow custom lists to be deployed in the "All Configuration" deployment scope.


## 1 Enhance Sales Agreements to include Custom Lists Sub Tab

In order to fulfill the request to include the custom list in "All Configuration" deployment, but allow for carriers to have the flexibility to decide if they would like to include custom lists in the deployment, a change will be made to "Sales Agreements".

The "Sales Agreements" details will feature sub tabs for Packages and Custom Lists. Packages will be displayed as they are currently but moved to display under a sub tab labeled "Packages". A new sub tab will be created for "Custom Lists". The custom list(s) desired to be added to the product will be available for selection under the "Custom Lists" sub tab.

**Sales Agreements**

**FL Access Carrier**



Product	Agreement	
<b>Accumulation Product</b>	<b>True</b>	<b>X</b>
Annuity 222	True	X
Annuity 333	True	X
Annuity Rates DRAFT	True	X
BD Change - INS	False	X
BD Change - ITC	False	X
Chris Conversion Tool DEMO	True	X
Classic Term	True	X
CUMA Annuity	False	X

**Sales Agreement of "FL Access Carrier" for product "Accumulation Product"**

**Selling Org** FL Access Carrier

**Product Name**

**More Info**

**Start**  **End**

**Time Zone**

**Replace Product** Select Replaced Product

**Illust Services Role**

**Last Updated** 5/6/2019 3:36 PM UTC

**Sales Agreement Details**
**Sales Agreement History**

**Packages**
**Custom Lists**

**Available Packages**

- Account Opening Application
- Annuity Rates DRAFT Application
- BD Change - INS Post Issue
- BD Change - ITC Post Issue
- Carrier FIA Package Application
- Chris Test Application
- Demo Wizard Package Application
- Digital Package (Wizard Screens) Application
- e-Delivery E-Delivery
- EITS Wizard Package Application
- Fee Inquiry VA

**Assigned Packages**

eConsent Application

Package Duty Required

Fee Inquiry\_FIA Fee Inquiry

Package Duty Required

FIA Package Application

Package Duty Required

**State Approvals**
**Back Office Script**
**Options**


State	Approved
Alabama	✓
Alaska	✓
Arizona	✓
Arkansas	✓
California	✓
Colorado	✓

☒ Check/Uncheck All

**Save Sales Agreement**

Sales Agreements

FL Access Carrier



Product	Agreement	
Accumulation Product	True	X
Annuity 222	True	X
Annuity 333	True	X
Annuity Care Plus	True	X
Annuity Care Plus II	True	X
Annuity Premium Choice	True	X
Annuity Rates DRAFT	True	X
Ascent Pro 10	True	X
RD Change - INS	False	X

Sales Agreement of "FL Access Carrier" for product "Accumulation Product"

Sales Agreement Details

Sales Agreement History

**Selling Org** FL Access Carrier

Product Name

More Info

Start  End

Time Zone [Dropdown]

Replace Product Select Replaced Product

Illust Services Role

Last Updated 9/29/2020 1:13 PM UTC

State Approvals

Back Office Script

Options

State	Approved
Alabama	✓
Alaska	✓
Arizona	✓
Arkansas	✓
California	✓
Colorado	✓

✓ Check/Uncheck All

Packages

Custom Lists

**Available Custom Lists**

Products

**Assigned Custom Lists**

TEST GRID

Save Sales Agreement

### Acceptance Criteria


- Sales Agreement features sub tabs for "Packages" and "Custom Lists".
- Packages are displayed under the new sub tab, but functionality remains unchanged.
- Custom Lists can be added and assigned to the selected product.
- Custom Lists do not contain the "Optional" or "Required" drop down selection like Packages.

## 2 Include Custom Lists with All Configuration Deployment

With the addition of Custom Lists in the Sales Agreement, the deployment page will be updated to show the details for Custom Lists deployed under the All Configuration, Distributor All Configuration and Carrier Only All Configuration. "Custom List Changes:" will be added on the deployment summary to the right of the page, featured under the Deployment Description Summary and the Total for Selected Items summary.

Sales Agreements

**FL Access Carrier**



Product	Agreement	
<b>Accumulation Product</b>	True	X
Annuity 222	True	X
Annuity 333	True	X
Annuity Care Plus	True	X
Annuity Care Plus II	True	X
Annuity Premium Choice	True	X
Annuity Rates DRAFT	True	X
Ascent Pro 10	True	X
RD Change - INS	False	X

Sales Agreement of "FL Access Carrier" for product "Accumulation Product"

**Selling Org** FL Access Carrier

**Product Name**

**More Info**

**Start** 01/01/1900 **End**

**Time Zone** UTC - Coordinated Universal Time

**Replace Product** Select Replaced Product

**Illust Services Role**

**Last Updated** 10/5/2020 7:53 PM UTC

Packages
Custom Lists

**Available Custom Lists**

Cust List 1

**Assigned Custom Lists**

Products  
TEST GRID

▶
◀

**State Approvals** Back Office Script Options


State	Approved
Alabama	✓
Alaska	✓
Arizona	✓
Arkansas	✓
California	✓
Colorado	✓

✓ Check/Uncheck All

Save Sales Agreement

Sales Agreements

FL Access Carrier



Product	Agreement	
Accumulation Product	True	X
Annuity 222	True	X
Annuity 333	True	X
Annuity Care Plus	True	X
Annuity Care Plus II	True	X
Annuity Premium Choice	True	X
Annuity Rates DRAFT	True	X
Ascent Pro 10	True	X
RD Change - TMS	False	X

Sales Agreement of "FL Access Carrier" for product "Accumulation Product"

Sales Agreement Details

Sales Agreement History

**Selling Org** FL Access Carrier

**Product Name**

**More Info**

**Start** 01/01/1900 **End**

**Time Zone** UTC - Coordinated Universal Time

**Replace Product** Select Replaced Product

**Illust Services Role**

**Last Updated** 10/5/2020 7:53 PM UTC

State Approvals

Back Office Script

Options

State	Approved
Alabama	✓
Alaska	✓
Arizona	✓
Arkansas	✓
California	✓
Colorado	✓

☒ Check/Uncheck All

Available Custom Lists

Assigned Custom Lists

Cust List 1  
Products  
TEST GRID

Save Sales Agreement



Deploy - FL Access Carrier

Synchronization Scope: All Configuration ▼

Reason:

Deployment

History

Type here to filter by organization or description

Description	Organization	Deploy
Accumulation Product	FL Access Carrier	<input checked="" type="checkbox"/>
Allianz 222 Annuity	Allianz	<input type="checkbox"/>
Allianz 360 Annuity with Benefit Rider	Allianz	<input type="checkbox"/>
Allianz 365i Annuity	Allianz	<input type="checkbox"/>
Allianz Core Income 7 Annuity	Allianz	<input type="checkbox"/>
Allianz Endurance Plus Annuity	Allianz	<input type="checkbox"/>
Allianz MasterDex X	Allianz	<input type="checkbox"/>
American Legacy Fee Based	Lincoln Financial	<input type="checkbox"/>
American Legacy Fee Based - New York	Lincoln Financial	<input type="checkbox"/>
American Legacy Series B Share	Lincoln Financial	<input type="checkbox"/>
American Legacy Series B Share - New York	Lincoln Financial	<input type="checkbox"/>
American Legacy Series C Share	Lincoln Financial	<input type="checkbox"/>
American Legacy Series C Share - New York	Lincoln Financial	<input type="checkbox"/>
American Legacy Series L Share	Lincoln Financial	<input type="checkbox"/>
American Legacy Series L Share - New York	Lincoln Financial	<input type="checkbox"/>
Annuity 222	FL Access Carrier	<input type="checkbox"/>
Annuity 333	FL Access Carrier	<input type="checkbox"/>
Annuity Care Plus	FL Access Carrier	<input type="checkbox"/>
Annuity Care Plus II	FL Access Carrier	<input type="checkbox"/>
Annuity Premium Choice	FL Access Carrier	<input type="checkbox"/>
Annuity Rates DRAFT	FL Access Carrier	<input type="checkbox"/>
Ascent Pro 10	FL Access Carrier	<input type="checkbox"/>
Benefit Choice	FL Access Carrier	<input type="checkbox"/>
ChoicePlus Assurance Fee Based	Lincoln Financial	<input type="checkbox"/>
ChoicePlus Assurance Fee Based - New York	Lincoln Financial	<input type="checkbox"/>

☐ Force Deploy

Deploy Now

[View All Scheduled Deployments](#)  
 Schedule Deployment at (Mountain Time):

Schedule Deployment

**Accumulation Product**  

Product Changes:	0
Form Changes:	0
Package Changes:	0
<a href="#" style="color: #007bff;">Sales Agreement Changes:</a>	1
Rule Set Changes:	0
Custom List Changes:	1
Activity Changes:	0

**Total for Selected Items**  

Product Changes:	0
Form Changes:	0
Package Changes:	0
<a href="#" style="color: #007bff;">Sales Agreement Changes:</a>	1
Rule Set Changes:	0
Custom List Changes:	1
Activity Changes:	0

Functionality will include custom list changes, but carrier and distributor custom list changes will not be impacted by one another.

Example:

Distributor adds custom lists, carrier deploys. Custom lists will not be deleted/overwritten/deployed in the distributor custom list view due to the carrier deployment.

***Acceptance Criteria***

- "Custom List Changes:" is added under the deployment description summary.
- "Custom List Changes:" is added under the Total for Selected Items summary.
- Custom Lists are deployed in the "All Configuration" deployment scope.
- Custom Lists are deployed in the "Distributor All Configuration" deployment scope.
- Custom Lists are deployed in the "Carrier Only All Configuration" deployment scope.
- "Custom List Changes:" updates as expected with the correct number of Custom Lists included in All Configuration deployment action for the deployment description summary.
- "Custom List Changes:" updates as expected with the correct number of Custom Lists included in All Configuration deployment action for the Total for Selected Items summary.
- "Custom List Changes:" updates as expected with the correct number of Custom Lists included in Distributor All Configuration deployment action for the deployment description summary.
- "Custom List Changes:" updates as expected with the correct number of Custom Lists included in Distributor All Configuration deployment action for the Total for Selected Items summary.
- "Custom List Changes:" updates as expected with the correct number of Custom Lists included in Carrier Only All Configuration deployment action for the deployment description summary.
- "Custom List Changes:" updates as expected with the correct number of Custom Lists included in Carrier Only All Configuration deployment action for the Total for Selected Items summary.
- Deployment by a carrier does not impact distributor custom list changes.
- Deployment by a distributor does not impact carrier custom list changes.
- Distributors cannot view or remove carrier custom lists from the Sales Agreements, Custom Lists tab.
- Custom List upload/viewing functionality remains on the Custom Lists action and does not change that option.