

# Deploy Custom Lists in All Configuration Scope

# **FIRELIGHT BASE**



Platform

**DEPLOY CUSTOM LISTS IN ALL CONFIGURATION SCOPE** 

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# 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.

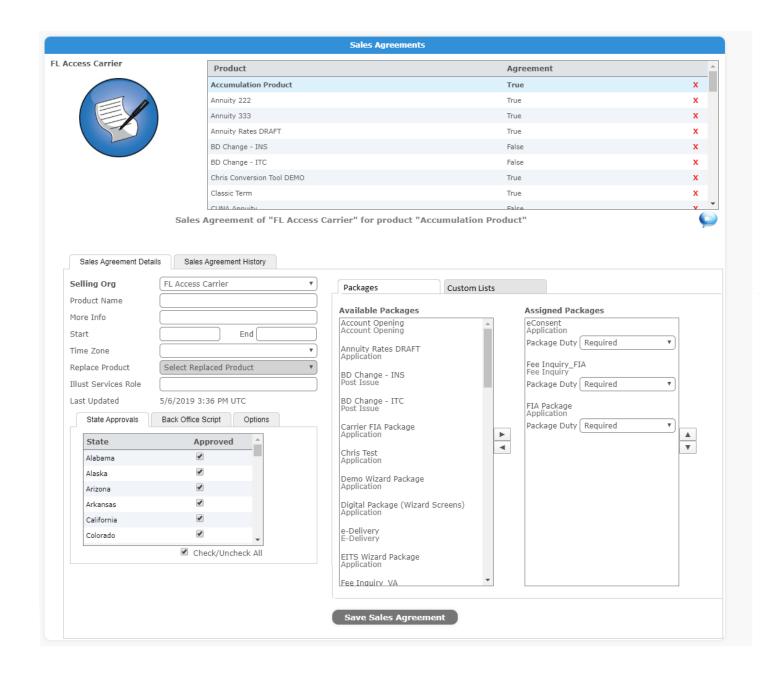
### 1 Enhance Sales Agreements to include Custom Lists Sub Tab

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.

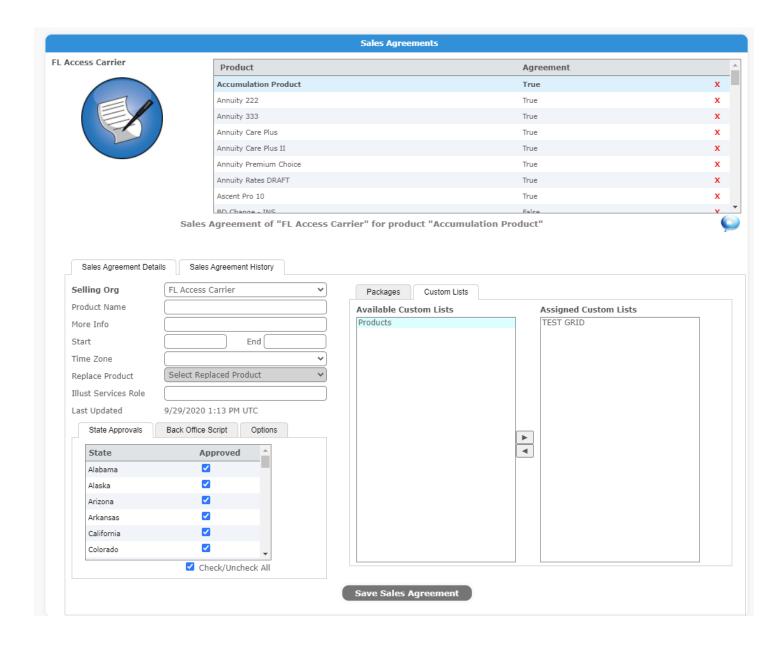












#### Acceptance Criteria

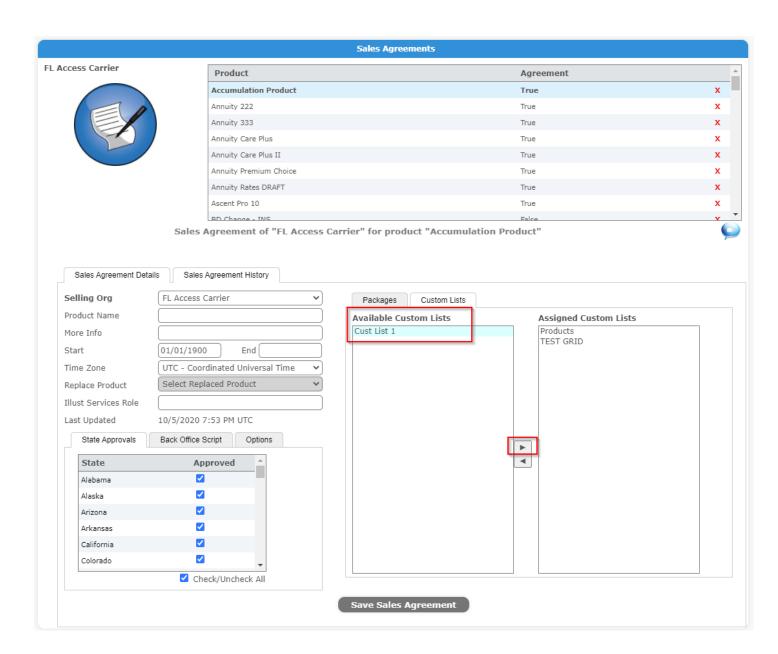
- Sales Agreement features sub tabs for "Packages" and "Custom Lists".
- Packages are displayed under the new sub tab, but functionality remains unchanged.
- Custom Lists can be added and assigned to the selected product.
- Custom Lists do not contain the "Optional" or "Required" drop down selection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





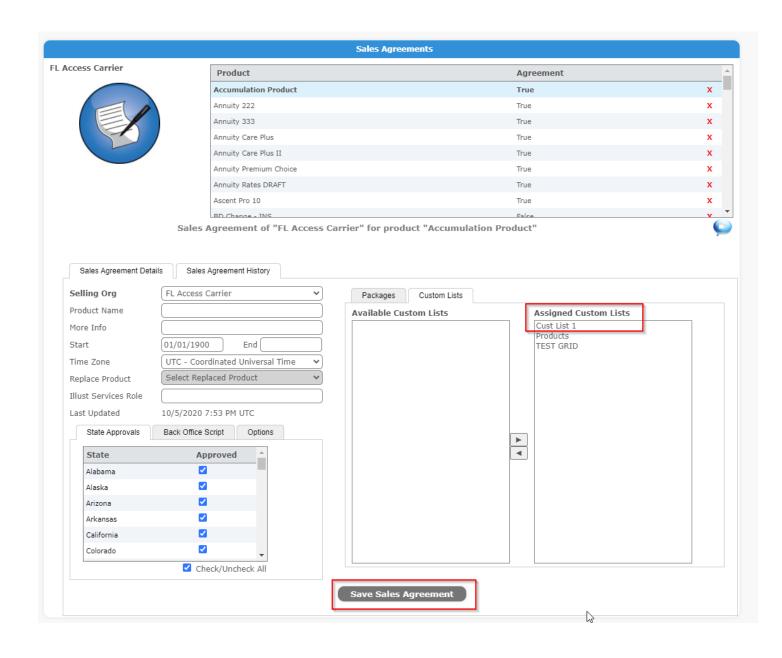
## 2 Include Custom Lists with All Configuration Deployment

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.



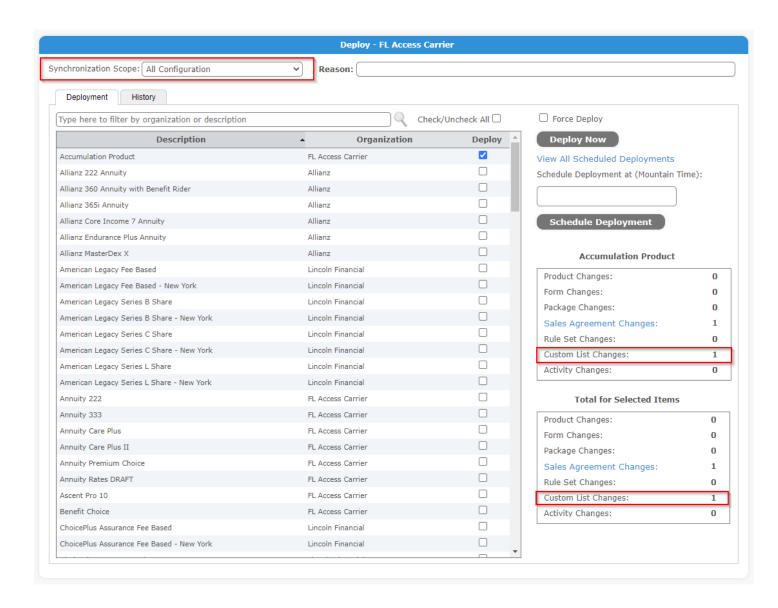












Functionality will include custom list changes, but carrier and distributor custom list changes will not be impacted by one another.

#### 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.