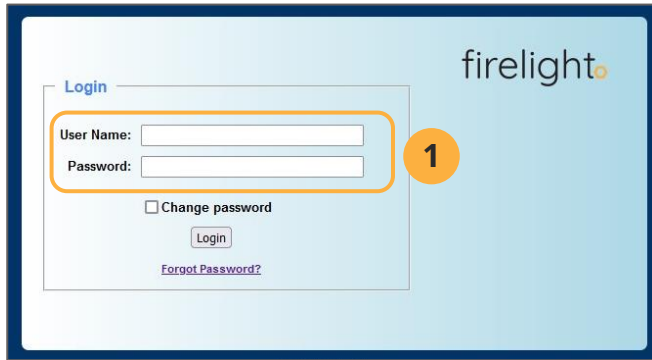


# Carrier Steps for Establishing a Sales Agreement with a Distributor & Deploying a Product

## REFERENCE GUIDE

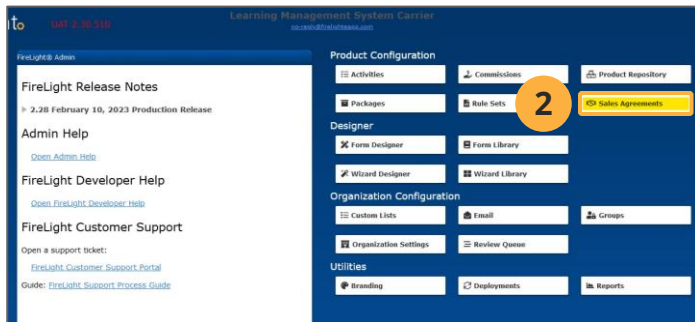
This document demonstrates how a Carrier establishes a new sales agreement in Firelight between the Carrier and a Distributor or a Distributor's sub-firm and deploy a product to the Distributor's Firelight instance. Carriers should execute these steps with their environment expert to ensure all requirements are considered. If you would like to deploy a product to a Distributor's sub-firm, follow the steps in the 'Deploying to a Distributor's Sub-firm' section.



### 1. Login

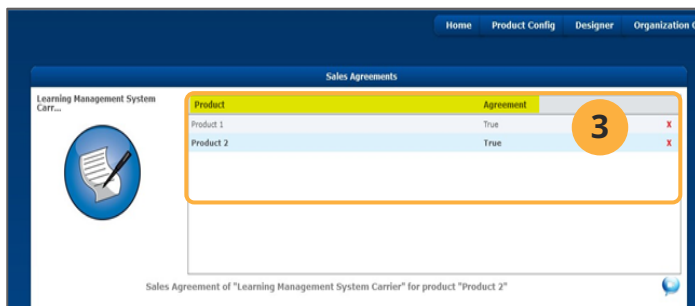
Type in your **Username & Password** to login to your FireLight UAT Admin environment. Configuration and testing take place in the UAT environment. To access FireLight, click [here](#).

For login support, contact your Project Manager.



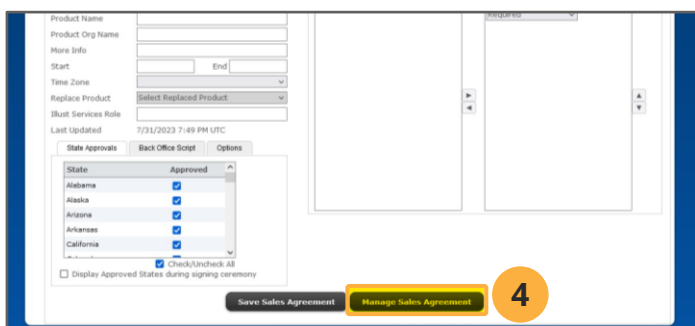
### 2. Sales Agreement

From FireLight Admin, select **Sales Agreement**. Sales Agreement is used to define and maintain Carrier and Distributor relationships.



### 3. Product

Select the desired **product** in the Sales Agreement table.

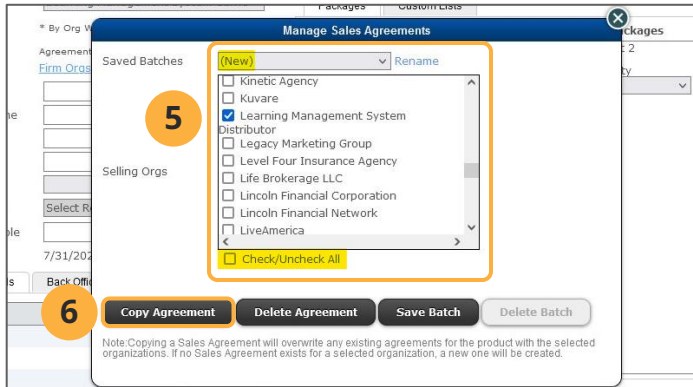


### 4. Manage Sales Agreement

With the product selected, click the **Manage Sales Agreement** button.

# Carrier Steps for Establishing a Sales Agreement with a Distributor & Deploying a Product

## REFERENCE GUIDE

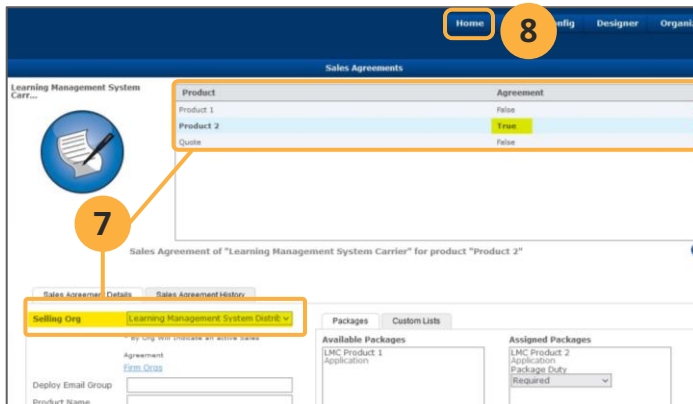


### 5. Saved Batches & Selling Orgs

- Confirm **(New)** is in the **Saved Batches** field
- Locate the desired distributor(s) within the list and check the box next to their name(s)
- Verify the **Check/Uncheck All** field is unchecked

### 6. Copy Agreement

Click **Copy Agreement**.



### 7. Verify the Agreement

Verify the agreement is established by clicking the **Selling Org** field and selecting the Distributor. Confirm the product's agreement is set to **True**.

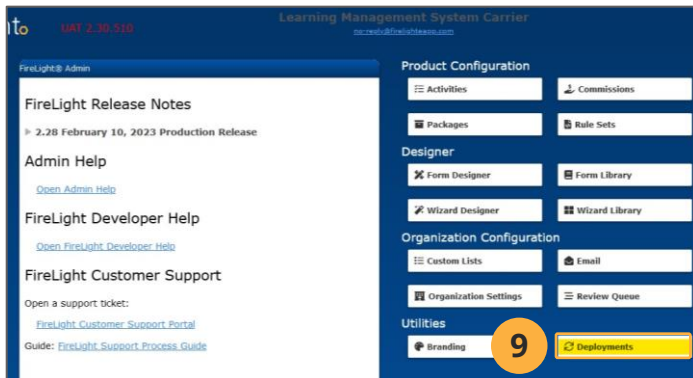
### 8. Home

After you establish the Sales Agreement, you must deploy the changes, select **Home**.

**IMPORTANT:** Before deploying, contact your environment expert or development team to confirm all development is ready. Deploying with unfinished changes may result in (not-in-good-order) issues.

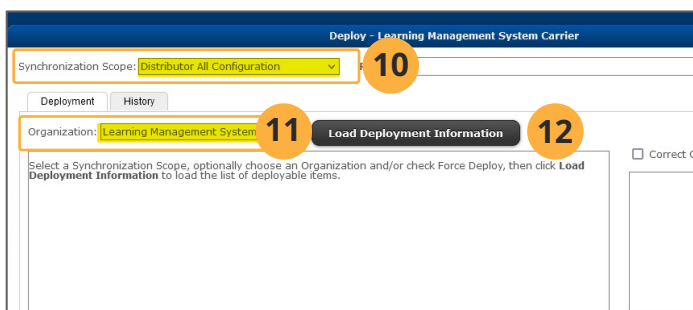
### 9. Deployments

From the Firelight Admin, select **Deployments**.



### 10. Synchronization Scope

From the Synchronization Scope drop-down, select **Distributor All Configuration**.



### 11. Organization

From the **Organization** field, select the desired **Distributor**.

### 12. Load Deployment Information

Click **Load Deployment Information**.

# Carrier Steps for Establishing a Sales Agreement with a Distributor & Deploying a Product

## REFERENCE GUIDE

Deploy - Learning Management System Carrier

Synchronization Scope: Distributor All Configuration Reason: Carrier A - Product 2 Launch

Deployment History

Organization: Learning Management System Distributor Load Deployment Information

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

Description	Organization	Deploy
Product 1	Learning Management System Distributor	<input type="checkbox"/>
Product 2	Learning Management System Distributor	<input checked="" type="checkbox"/>

Deploy Now View All Scheduled Deployments Schedule Deployment at (Mountain Time)

Schedule Deployment

### 13. Deploy Checkbox

Within the table, locate the desired product(s) and check the **Deploy** checkbox(s).

### 14. Reason

Type in a reason for the deployment, including the carrier's name and product.

### 15. Deploy Now

Click **Deploy Now** or Schedule Deployment.

**Note:** If you use Schedule Deployment, you need to select a date to deploy.

## Verify the Deployment was a Success

### 1. History

Select the **History** tab.

### 2. Load History

Click **Load History**.

### 3. Product Success

You can see up to 3 rows per deployment (one each for UAT, Staging, and Production). In the To Server field under the Deployment Statistics section, verify that the UAT item is successful.

Deploy - Learning Management System Carrier

Synchronization Scope: Distributor All Configuration Reason: Carrier A - Product 2 Launch

Deployment History

To Server: All To Organization: All

Start: End: Load History

Description	Status	Time
Carrier A - Product 2 Launch	Success	7/31/2023 4:21:56 PM
Carrier A - Product 2 Launch	Success	7/31/2023 4:21:55 PM
Carrier A - Product 2 Launch	Success	7/31/2023 4:21:53 PM

Deployment Statistics

Start Time: 7/31/2023 4:21:53 PM

Completion Time: 7/31/2023 4:21:56 PM

Elapsed Time: 00:00:03

From Server: UAT

To Server: UAT

User Name: Tyler J.

## PRO TIP:

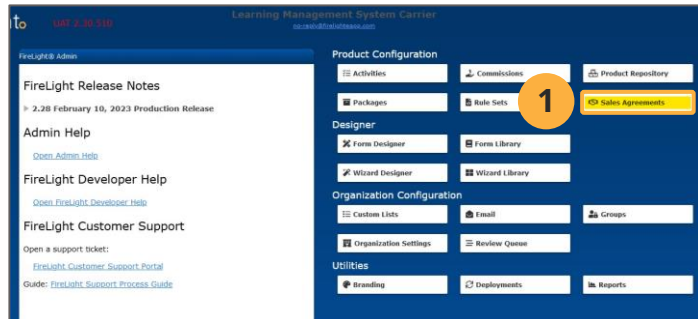
- Once the deployment is complete and confirmed, inform the distributor(s) that the product(s) are now available in their UAT environment.
- It's recommended that the Distributor submits at least 1 test case for each product in UAT before launching to production. The Carrier should review each test case transmission for In-Good-Order accuracy. This ensures that the Distributor's workflow additions are compatible with the Carrier's back-office system.

# Carrier Steps for Establishing a Sales Agreement with a Distributor & Deploying a Product

## REFERENCE GUIDE

### Deploying to a Distributor's Sub-firm(s)

Log into the Firelight UAT admin system where system configuration and testing take place. In most instances, Hexure generates and maintains logins for the admin system. For login support, contact your Project Manager or open a Jira ticket.



#### 1. Sales Agreement

From Firelight Admin, select **Sales Agreement**. Sales Agreement is used to define and maintain Carrier and Distributor relationships.

#### 2. Selling Org

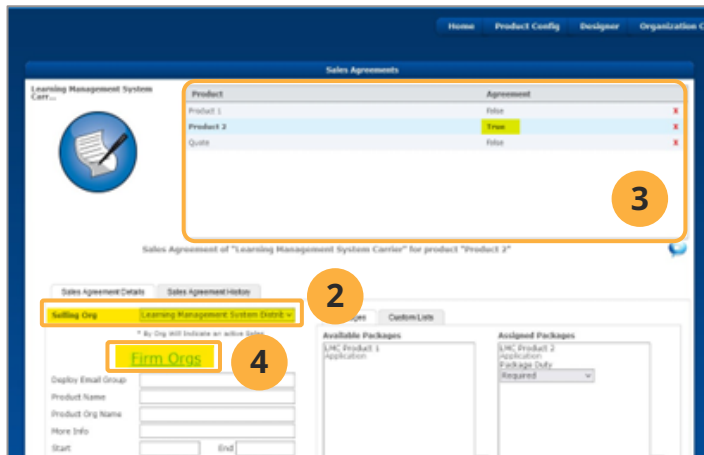
In the Sales Agreement Details tab, from the **Selling Org** drop-down, select the Distributor's organization.

#### 3. Product

Select the desired **product** in the Sales Agreement table.

#### 4. Firm Org

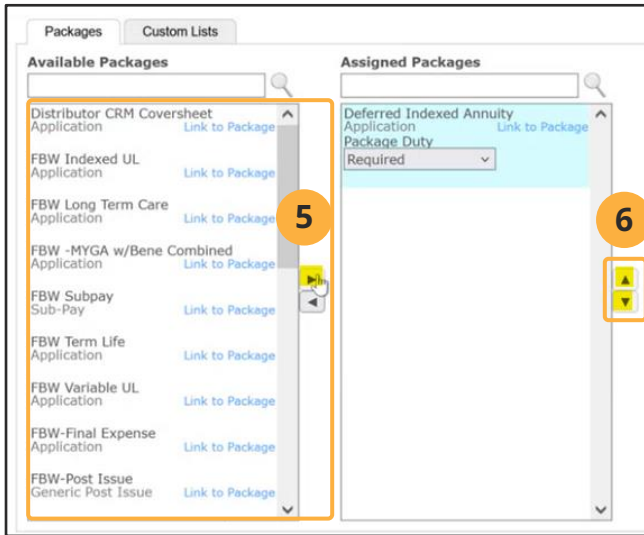
Click **Firm Orgs** and select the necessary sub-firm from the Firm Organization pane.




**Note:** The Firm Org list displays all firms that have been set up for organizations in Firelight. Make sure you only select the appropriate firms that apply to the selected selling organization.

# Carrier Steps for Establishing a Sales Agreement with a Distributor & Deploying a Product

## REFERENCE GUIDE




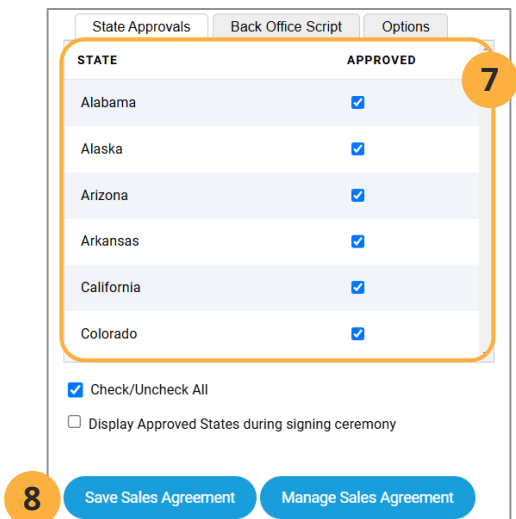
### 5. Available Package

From the Packages Tab, select the **Available Package** that needs to be in the sales agreement. Click the  (right arrow) to assign the package.

Repeat this action for each package that needs to be assigned.

### 6. Arrange Packages

From the right side of the Assigned Packages list, use the  (up and down arrows) to determine the order the packages should appear to a user.



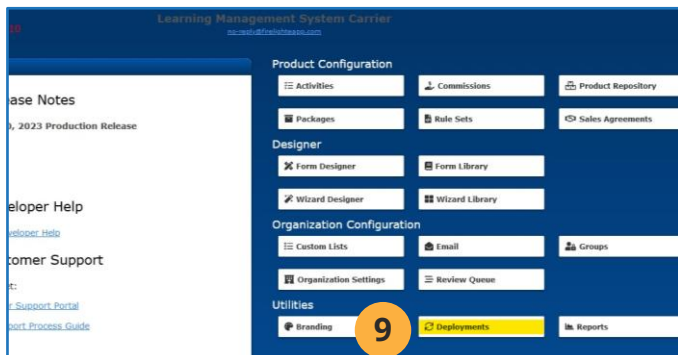
### 7. State Approval

From the State Approval tab, mark the checkbox for each **state** for which the product has been approved.

### 8. Save Sales Agreement

When finished, click **Save Sales Agreement**.

**Note:** Before Proceeding, contact your environment expert or development team to confirm that all in-progress development is ready for deployment. Moving onto the steps below with unfinished admin changes may result in not in-good-order submissions (NIGO).



### 9. Deployments

From the Firelight Admin home screen, select **Deployments**.



# Carrier Steps for Establishing a Sales Agreement with a Distributor & Deploying a Product

## REFERENCE GUIDE

Deploy - Learning Management System Carrier

Synchronization Scope: **Distributor All Configuration** 11

Deployment History

Organization: **Learning Management System Distributor** 12

**Load Deployment Information** 13

Select a Synchronization Scope, optionally choose an Organization and/or check Force Deploy, then click **Load Deployment Information** to load the list of deployable items.

Deploy - Learning Management System Carrier

Synchronization Scope: **Distributor All Configuration** Reason:

Deployment History

Organization: **Learning Management System Distributor** **Load Deployment Information**

Type here to filter by organization or description

Description	Organization	
Product 1	Learning Management System Distributor	
Product 2	Learning Management System Distributor	<input checked="" type="checkbox"/>

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**Deploy Now**

View All Scheduled Deployments

Schedule Deployment at (Mountain Time)

**Schedule Deployment**

Deploy - Learning Management System Carrier

Synchronization Scope: **Distributor All Configuration** Reason: **Carrier A - Product 2 Launch** 15

Deployment History

Organization: **Learning Management System Distributor** **Load Deployment Information**

Type here to filter by organization or description

Description	Organization	
Product 1	Learning Management System Distributor	
Product 2	Learning Management System Distributor	

16

**Deploy Now**

View All Scheduled Deployments

Schedule Deployment at (Mountain Time)

**Schedule Deployment**

Deploy - Learning Management System Carrier

Synchronization Scope: **Distributor All Configuration** Reason: **Carrier A - Product 2 Launch**

Deployment **History** 17

To Server: **All** To Organization: **All**

Start: End: **Load History** 18

Description	Status	Start Time
Carrier A - Product 2 Launch	Success	7/31/2023 4:21:56 PM
Carrier A - Product 2 Launch	Success	7/31/2023 4:21:55 PM
Carrier A - Product 2 Launch	Success	7/31/2023 4:21:53 PM

Deployment Statistics

Start Time: 7/31/2023 4:21:52 PM

Completion Time: 7/31/2023 4:21:53 PM

Elapsed Time: 00:00:01.1950000

From Server: UAT

To Server: **UAT**

User Name: Tyler\_LMSC

Deployment Reason: Carrier A - Product 2 Launch

## 11. Synchronization Scope

Change the Synchronization Scope to **Distributor All Configuration**.

## 12. Organization

Change the **Organization** to the Distributor.

## 13. Load Deployment Information

Click **Load Deployment Information**.

## 14. Deploy Checkbox

Within the table, locate the desired product(s) and check the **Deploy** checkbox(s).

## 15. Reason

Add details to the **Reason** field, describing what is being deployed. Include both the Carrier name and product name for history tracking.

## 16. Deploy Now

Click **Deploy Now** or select a date and click **Schedule Deployment**. In the Confirm Deploy popup, select Ok.

## 17. History

To verify the deployment was successful, click the **History** tab.

## 18. Load History

Click **Load History**. You can see up to 3 rows per deployment (UAT, Staging, Production). The item with UAT beside the To Server field in the Deployment Statistics must be successful.

**Note:** Once the deployment is complete and confirmed, inform the Distributor that the product(s) are available in their UAT environment.

It is recommended for the Distributor to submit at least one test case for each product in UAT before launching to production. The Carrier should review each test case transmission for In-Good-Order accuracy. This ensures that the Distributor's workflow additions are compatible with the Carrier's back-office system.