FireLight Admin Information Checklist

Use the following checklist to gather information for setting up forms and profiles in FireLight® Admin.

For each Product:

- ☐ Carrier (manufacturer) product name
- ☐ Sales Agreement product name
- ☐ Product type
- ☐ Rank Order
- ☐ CUSIP ID
- ☐ Carrier Code
- ☐ State Approvals

For each Package:

- ☐ Package name
- ☐ Package type
- ☐ List of forms to include
- ☐ List of role codes to include
- ☐ Form inclusion type
  - Required
  - Conditional
  - Optional
  - Print Only
  - Submit Only
  - Input Only Required
  - Input Only Conditional

For each Sales Agreement:

- ☐ Originating manufacturer name
- ☐ Selling organization
- ☐ Products to include
- ☐ Alternate product names if applicable, optional
- ☐ Agreement start and end dates, optional
- ☐ Time zone for agreement, optional
- ☐ Back Office Scrip data for work flow
- ☐ State approvals for agreement
- ☐ Which Package for each product in the agreement
- ☐ Whether to auto deploy, optional

For each Form when added:

- ☐ The PDF file (file name and location on your computer/network)
- ☐ Form Number
- ☐ Form Name
- ☐ Description
- ☐ Edition/Version of the form, optional
- ☐ Date to activate the form, optional
- ☐ Date to expire the form, optional
- ☐ Time zone for dates, optional
- ☐ Form that will replace this form on expiration, if known, optional
- ☐ Is this form part of Back Office?
- ☐ Is this form a Report?
- ☐ Is this form a Template?
- ☐ Document Tag type
- ☐ State approvals for this form

For each form when edited in the Designer:

- ☐ Data ID (DataItemID) of any field to be copied in from a different form
- ☐ List of controls and field IDs to add
- ☐ List of controls and field IDs to edit
- ☐ List of controls and field IDs to delete
- ☐ Rules for each field
- ☐ Location for placement of controls
- ☐ Field properties for each control
- ☐ Tabbing order for controls

For Form to FireLight mapping:

- ☐ Form data ID (DataItemID) for each form data field to be mapped

For email templates:

- ☐ New email wording
- ☐ New or different variable field names for data fill