# FireLight Admin Information Checklist

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

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| **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 |