Using the FireLight Navigation Bar

REFERENCE GUIDE

The navigation menu on the top right-hand side of the screen is displayed throughout the FireLight interface. Reference this guide to help you use this menu.

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New Sub-Pay - Subpay Status: Data Entry Updated: 5/20/2024				

1. Home

Select **Home** to return to the FireLight homepage or main dashboard.

2. New Activity

New Activity provides the same range of options as the buttons under the Start New section. Some of these might include; Quote, Illustration, Application, and others

3. All Activities

Select **All Activities** to view all activities, search for a specific activity, or use filters to narrow your search for activities.

4. Preferences

Select **Preferences** to set your personal preferences for FireLight, like name, Firm, address, phone number, and time zone.

5. Training

Select **Training** to view agent training videos on how to use FireLight.

Setting User Preferences in FireLight

REFERENCE GUIDE

Learn how to edit your FireLight personal preferences and edit your name, time zone, Firm Name, address, and phone number, along with Reviewer or Review Queue preferences.

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1. Preferences

From the top menu of FireLight, select **Preferences.**

2. General

From General, you can edit your Full Name, Email Address, Default State Jurisdiction, Default Product Type, Time Zone, Language, and Number of Cases per page.

3. Agent

From Agent you can edit your Firm Name, Phone Number, Business & Firm Address, Central Registration Depository (CRD) Number, and National Producer Number.

4. Reviewers

You may have a **Reviewers** section to add a new reviewer by name and email.

5. Review Queue

You may have a **Review Queue** section to edit Review Queue settings.

6. Quote

You can set a **Default Line of Business** for quotes, for example "Life."

7. Save

Click **Save** to save any updates or changes.

8. Mobile Access

Use this section to set up FireLight on a mobile device.