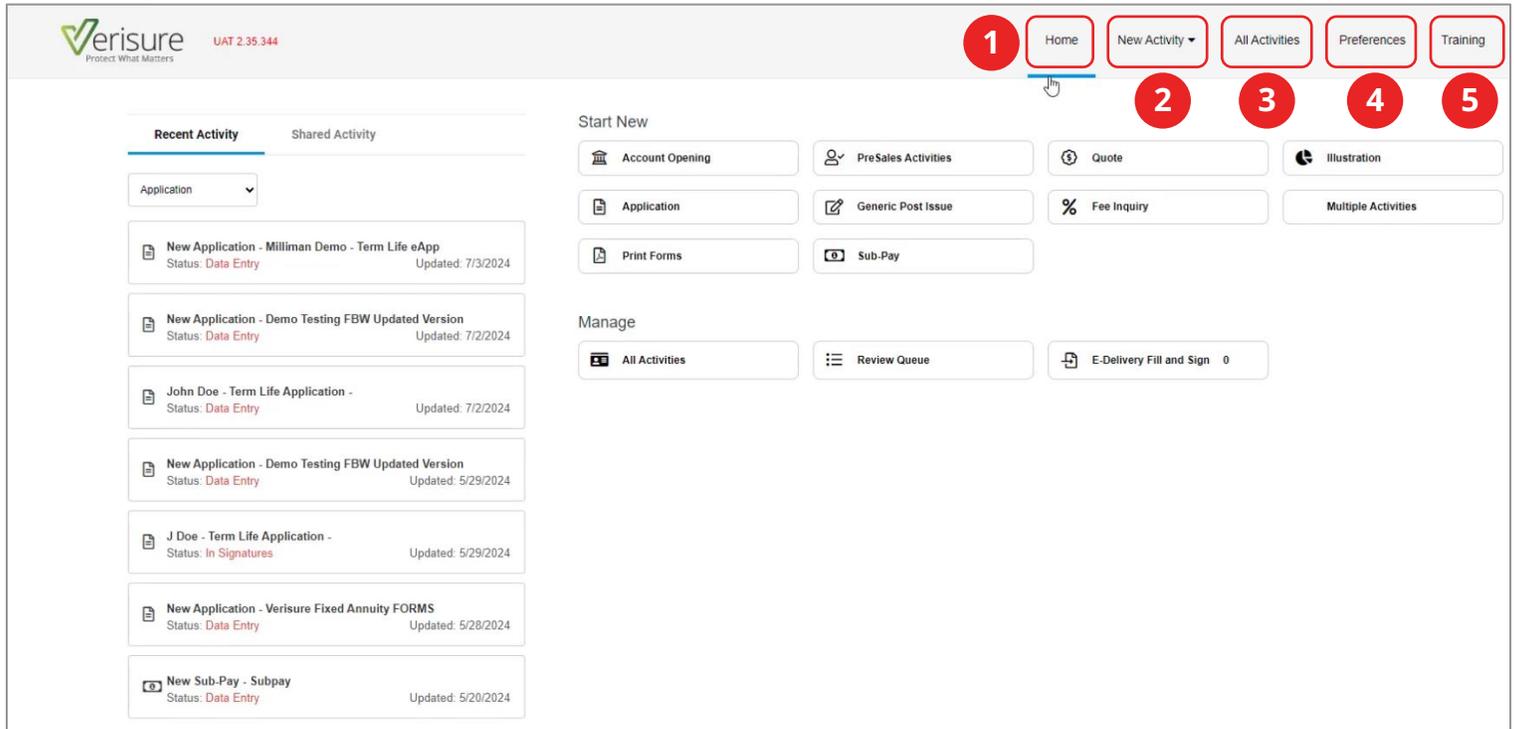


Using the FireLight Navigation Bar

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.



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.

The screenshot shows the 'My Preferences' page in the FireLight interface. The page is divided into several sections, each highlighted with a red box and a numbered callout:

- 1. Preferences:** The top navigation menu where the 'Preferences' link is highlighted.
- 2. General:** A section containing fields for 'User Full Name', 'User Email Address', 'Default Jurisdiction', 'Default Product Type', 'Default Time Zone', 'Locals', and 'Page Size for My App. List'. There are also checkboxes for 'Send Message Center Emails', 'Enable Rule Tracing For Session', and 'Display New FireLight UI'.
- 3. Agent:** A section for personal and business information, including 'First Name', 'Middle Name', 'Last Name', 'Firm Name', 'Phone Number', 'Business Address', 'Firm Address', 'CRD Number', 'NPN Number', and 'Zip Code'.
- 4. Reviewers:** A section with an 'Add New Reviewer' button and fields for 'Reviewer Full Name' and 'Reviewer Email Address'.
- 5. Review Queue Preferences:** A section with a 'Default Page Size for Review Queue Lists' dropdown and a 'Warn me before locking reviews' checkbox.
- 6. Quote:** A section with a 'Default Line of Business' dropdown menu.
- 7. Save:** A blue 'Save' button located at the bottom left of the 'Quote' section.
- 8. Mobile Access:** A section at the bottom with 'Add New Device' and 'Windows Install' buttons.

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.