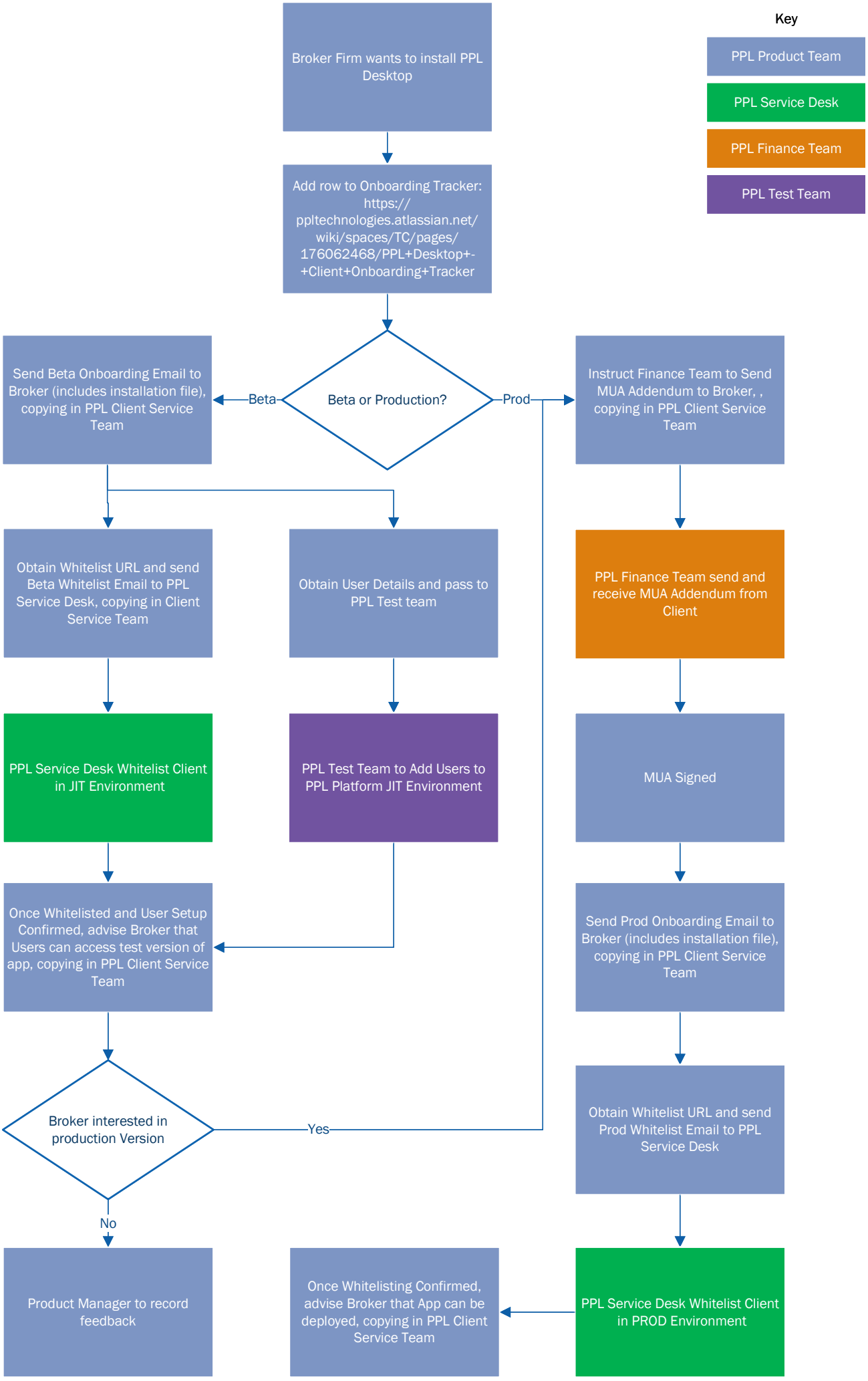
Key
PPL Product Team
PPL Service Desk
PPL Finance Team
PPL Test Team
Broker Firm wants to install PPL Desktop
Add row to Onboarding Tracker: https://pptechnologies.atlassian.net/wiki/spaces/TC/pages/176062468/PPL+Desktop+-+Client+Onboarding+Tracker
Beta or Production?
Beta
Prod
Send Beta Onboarding Email to Broker (includes installation file), copying in PPL Client Service Team
Instruct Finance Team to Send MUA Addendum to Broker, , copying in PPL Client Service Team
Obtain Whitelist URL and send Beta Whitelist Email to PPL Service Desk, copying in Client Service Team
Obtain User Details and pass to PPL Test team
PPL Finance Team send and receive MUA Addendum from Client
PPL Service Desk Whitelist Client in JIT Environment
PPL Test Team to Add Users to PPL Platform JIT Environment
MUA Signed
Once Whitelisted and User Setup Confirmed, advise Broker that Users can access test version of app, copying in PPL Client Service Team
Send Prod Onboarding Email to Broker (includes installation file), copying in PPL Client Service Team
Broker interested in production Version
Yes
No
Obtain Whitelist URL and send Prod Whitelist Email to PPL Service Desk
Product Manager to record feedback
Once Whitelisting Confirmed, advise Broker that App can be deployed, copying in PPL Client Service Team
PPL Service Desk Whitelist Client in PROD Environment