

Making News at BAIS

Message from Managing Director – Jim Armstrong

Welcome back – I hope you all had a relaxing and happy long weekend. Did you get caught out by any April Fools trickery?

We are very excited about the upcoming Steadfast convention. If you visit our stand Robert and Deb will be there to show you the changes to iFind which have been released this morning, as well as our Client Portal offering.

Also at Steadfast we will be joined on our stand by Your Finance Formula with an exciting new revenue generating proposition for you which will help you offer a fantastic value-adding service to your clients.

Meanwhile back at the office ... we are now in the final stages of planning the roll out of our latest version of ibais with full cross browser capability and the latest .net technology.

Our developers are also working on a lot of online products for clients as more and more of our clients are moving in this direction. We have products out there that are fully auto-rated, paid online via a payment gateway or premium funded, with documents produced automatically so the transaction is effectively 'no touch' for your staff. Some products are direct to public and some are offered by underwriting agents to brokers via a secure broker portal. All are fully integrated with ibais and update the back-office system with all the accounting entries completed and policy details populated. Talk to us if you are interested in finding out more about what we can do for you.



BAIS is a proud supporter of Feel the Magic Foundation and Camp Magic - A Place for Grieving Kids to Grow

www.feelthemagic.org.au

Ask Sheri for more info

Steadfast Convention

It's here! The new iFind Google style search, based on your feedback, has been released. If you would like to see it in action come and see us at Steadfast. More details in the What's New section of this edition of News@BAIS.

We will also have our new client portal being demonstrated – you could provide your key clients with access to view their policies and reproduce documents in a secure portal environment. Ask us at Stand 21 for more details.

Prize Draw

You could win a Google Home at the Steadfast convention! To be in the draw, talk to the BAIS team at Stand 21 at the Steadfast convention in Melbourne.



We look forward to seeing you all there!

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IMPORTANT ANNOUNCEMENT

Unveiling at the 2018 Steadfast Conference:

Discover the advantages of becoming a [Finance Referral Partner](#)



YourFinanceFormula

Take advantage of the newly designed iBAIS system that streamlines Finance referrals at the click of a button. Offer your clients the following finance products via your iBAIS System:



- Home Loans
- Investment Loans
- Vehicle & Equipment Finance
- Self-Managed Superfund Loans

- Business Loans
- Commercial Property Loans
- Construction & Development Loans

It has been one year in development and we are excited to announce our latest initiative and strategic partnership at this year's Steadfast Conference.



- Add value for your clients
- Win more business

- Insulate your clients from competition
- Receive generous commissions

For those insurance brokers who wish to be part of the pilot program and request more information, please click here to [Register your Interest](#) and Your Finance Formula will be in touch with you shortly.

Client Processing

Client Code: FRED002 | FRED BLACK

Address: 103 GEORGE STREET | 2000

TY Gross: 4,891.92 | TY Net Profit: 450.00 | Unallocated

LY Gross: | LY Net Profit: | 30 Days

Active and Expired Policies

Memo No	Type	Class	Risk Description	Policy Number	U/W	St	Start	End	Invoice	CL	Balance	90+ Days
17120004	>> Pol	GEN	Test before pass fsl, sd to To Be Advised	RETAINGST	A		01/06/17	01/06/18	I14930			
17120003	Pol	GEN	Test before pass fsl, sd to To Be Advised	LLOYDS	A		01/06/17	01/06/18	I14929	1630.64	1630.64	1344.64

Client Finance Processing

Client Code: FRED002 | FRED BLACK

Address: 103 GEORGE STREET

TY Gross: 4,891.92 | TY Net Profit: 450.00 | Unallocated

LY Gross: | LY Net Profit: | 30 Days

Active and Expired Referrals:

Contract No	Status	Loan Class	Loan Amount	Purpose of Loan	Lender	LVR%	Term (months)	Settlement Date	Finance Expires	Broker Comm
9	Prospect		5,678,910		GE finance	0.00%	30			0.15
8	Lodged	Loan class two	100,000	Building restructure		0.00%				0.00
7	Lodged		88,888			0.00%				0.00
6	Lodged		99,999			0.00%				0.00
5	Lodged		101,000			0.00%				0.00

Contracts: 6

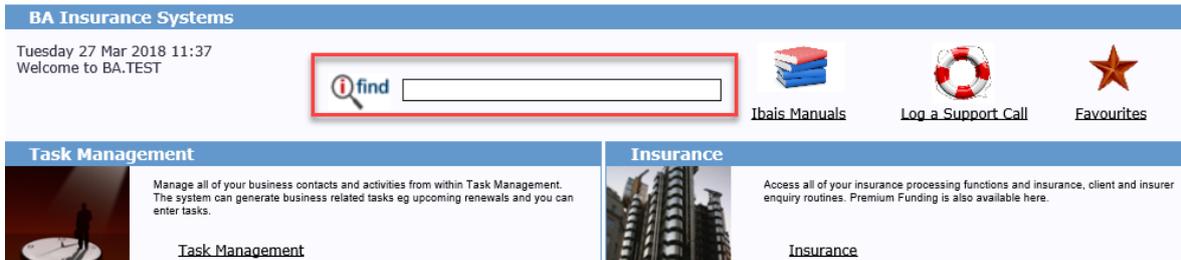
What's New?

Release Notes for System Modifications

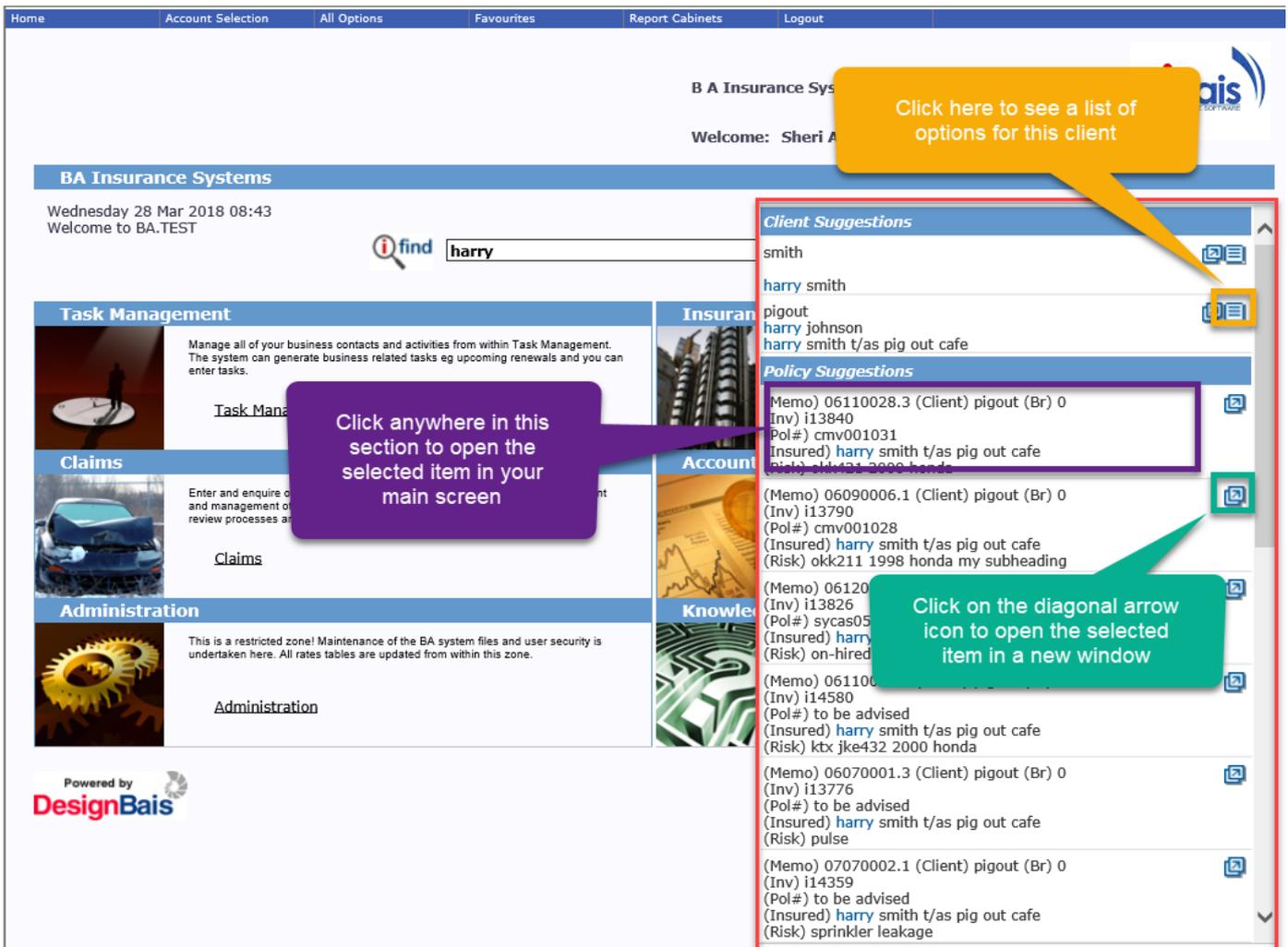
iFind has changed

We've heard your feedback and it was overwhelmingly in favour of iFind being a clickable event as opposed to a mouse over/hover. We also made the search results larger so that more results can be displayed at a time.

The first change you will notice is that iFind is now a permanent search field on the ibais Home screen:



When data is entered in the iFind search field the results are displayed as below in a larger pop up screen:



What's New? ...cont.

Release Notes for System Modifications

On screens other than the Home screen, this icon is now clickable rather than a 'hover over' to activate

Once the search has been completed you can close the screen by clicking here

Member	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
Used	RETAINGST	A	01/06/17	01/06/18	I14930	1630.64	1630.64	1465.64	1465.64
Used	LLOYDS	A	01/06/17	01/06/18	I14929	1630.64	1630.64	1344.64	1344.64
Used	ROYAL	A	01/06/17	01/06/18	I14928	1630.64	1630.64	1465.64	1465.64

Premium	1,000.00	Premium + Charges	1,630.64
FSL	360.00	Commission 15.0000 %	150.00
Underwriter GST	136.00	Commission GST	15.00
Stamp Duty	134.64	Withholding Tax+FBC	30.00
Policy Fee	0.00	Due to Insurers	941.00
Other Charges	0.00	Broker Gross Profit	150.00
Premium + Charges	1,630.64	Subagent Comm	0.00
Brokers Fees	0.00	Broker Net Profit	150.00
Rebate Amount	0.00	Subagent GST	0.00
Brokers Fee GST	0.00	Client GST	136.00
Client Payable	1,630.64	Debtor Payable	1,630.64

Help Us Help You

What you can do to assist the Support Team to help you

When you have a support issue to log there are some things you can do to make it easier for the team to help you more quickly and accurately.

Always provide as much detail as you can – it helps us find and solve the problem when we have a full description of what you were trying to do, any error messages and an example of the problem.



Our preferred method is for issues to be logged via the Log a Support Call icon on the ibais Home screen.

Wherever possible, please always ensure the following information is somewhere in your support call or email:

- Your Name, Contact number and Email address
- Which database (if you have more than one)
- What you were trying to do (steps you took before the issue occurred – this helps us replicate the issue)
- What went wrong (include a screen shot of any error messages displayed or describe what happened)
- An example (invoice number, memo number or client code etc) of where the issue happened
- Any other information that you think might be relevant or useful.

We work hard to provide you with quick turnaround and if the information we receive is detailed it can help to expedite the process. Thanks