News@BAIS

Making News at BAIS

Message from Managing Director – Jim Armstrong

Your input and feedback is very important to us, which is why in this edition of News@BAIS we are calling on you to let us know what you would like to see in the new Dashboard we are developing for ibais. Please take a few moments to send us your thoughts and suggestions.

It seems that a large percentage of brokers and underwriting agents are looking towards a more technology focused offering for their clients. This is certainly reflected in the development requests we are regularly receiving. Are you aware that we can create full quote, bind and pay facilities for your clients to access via your website, or for underwriting agents to make available to brokers via a Broker Portal? These products update directly into your ibais system in real time. We now also offer responsive design so that your site can be optimised on any device. Talk to us if you would like to know more about what we can do for you.

Hope you are all enjoying some milder weather as we move into Autumn. Sydney is finally seeing some relief from the hot Summer.

Until next time…

News@BAIS Contents

We Need You

Contribute Your Ideas to the New ibais Dashboard

As you may have seen in the last edition of NewsBAIS in 2018, we are currently working towards a fresh new look for ibais. A big part of this is the Dashboard which will replace the current Home screen, providing you with a customizable, visual representation of various data sets from your system.

To ensure that this new development is relevant and adds the most value to the system we are asking for your input. We want the dashboard to offer options that will enhance your experience of ibais and will make accessing the information you need on a daily basis easier and more efficient.

We envisage a set of graphs will be available that you can select to add to your own personalized dashboard, and that you can alter at any time if your requirements change. Some of the types of data that you might like to see could be Tasks, Renewals Outstanding, Sales or Earnings reports etc – This is where your input is so important to ensure that the options we make available are useful and relevant.

Graphs will be clickable to drill down into further information or proceed to process or action the item represented (eg a graph of outstanding renewals could be clicked on to see a list of the policies due to be renewed, and then they could be renewed from that list).

The selection of graphs to be displayed will be customizable for each user, so you can select the graphs relevant to your role, and different staff members can display different data on their dashboard.

Please take the time to let us know what type of data you would hope to see on your dashboard.

Contributions and ideas can be submitted to Sheri: sheri@bais.com.au - please put Dashboard as the Subject of your email.

What's New?

Release Notes for System Modifications

Proportional GST on Commission

A recent modification to the system allows you to set a policy class to calculate the GST on commission based on the ratio of total Insurer Premium GST to total Insurer Premium.

This caters for situations where part of the premium is GST exempt (eg partially overseas) and the commission on that portion of the premium is also to be treated as GST exempt. Where the policy class is flagged for Proportional GST on Broker Commission the system will automatically reduce the GST on Commission proportionally based on the Premium GST.

If this is required for any of your policy classes, please contact the Support Team for assistance on how to activate it.

Transaction Listing by Transaction Date Report

This report has been modified to add the following additional columns:

- Policy Fee
- Client Payable
- Due to Insurer
- Effective End Date

Daylight Saving Ends

Reminder

This weekend is the end of Daylight Savings time – clocks will be changing BACKWARD one hour on Sunday 7th April at 3:00am in NSW, ACT, SA, TAS, and VIC.

Do You Have a Story?

Invitation

If you have a story to share of an award, achievement or important anniversary for your company or a staff member, we would love to know so that we can share this in News@BAIS and join you in celebrating your successes.

To contribute a story please send an email with the details to sheri@bais.com.au with the subject line: News@BAIS Submission.

Are We Talking to the Right People?

You are receiving this newsletter as you have previously been put forward as one of the main contact points for our team to communicate with. Please let us know :

- If you do not wish to receive any further communication from us
- If there is anyone else who should be added to our distribution list

Changes to who we direct these and other general communications to can be advised by email to sheri@bais.com.au.

If you receive these newsletters please ensure that they are being distributed to all ibais users. Thank you.

Did You Know?

Handy Hints & Tips

Sunrise Recovery

From time to time there can be a miscommunication between ibais and Sunrise – perhaps your computer froze or you accidentally closed the screen without completing the transaction fully. When this happens the transaction may have a different status in ibais than what appears in Sunrise.

When a transaction has become mismatched you are likely to see an error saying this is "Not the Latest Version". Sunrise Recovery is the ibais process that helps you to correct these mismatches. There are two possible responses:

Delete in Sunrise - In this case the system has found that the transaction is incomplete in Sunrise and must be deleted and re-processed.

Process in ibais - In this case the transaction is completed in Sunrise but ibais is not up to date. When this response is received the system will allow you to process the transaction in ibais WITHOUT re-accessing Sunrise (because Sunrise already has the transaction)
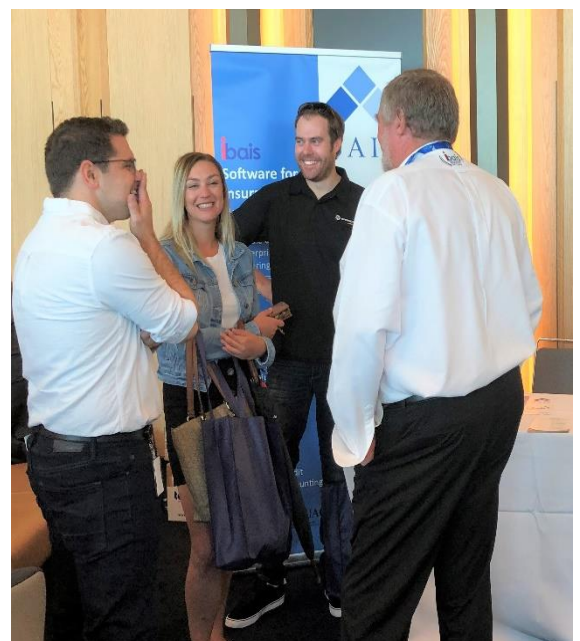
Previously it was not possible to recover an Amend Renewal transaction or a Closing. The system has been modified to allow these transactions to also be recovered if needed.

UAC Expo

Sydney

Robert and Sheri recently attended the UAC Expo in Sydney at the Hyatt.

We were happy to sponsor the Afternoon Drinks session. Thank you for joining us for a drink, those of you that were there.
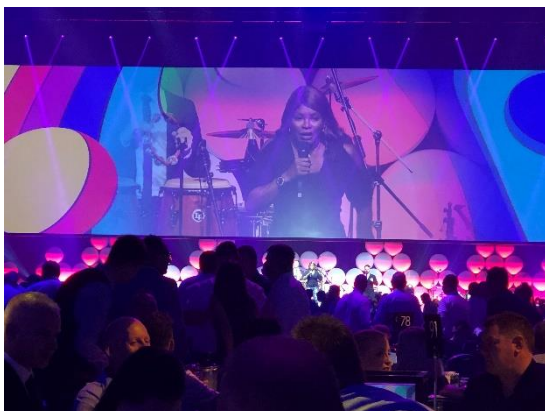
21st Steadfast Convention

Gold Coast

March also saw Robert and Sheri head to the 21st Steadfast Convention at the Gold Coast Exhibition Centre.

As always it is a wonderful opportunity for us to catch up with our clients and it was great to see so many of you at our stand over the three days.

The final Gala Dinner looked spectacular and Marcia Hines ensured the dance floor was put to good use.

Here are a few photos from the convention.

Steadfast Winner

$1000 Pre-Paid Mastercard

Congratulations to Ann Keenan from Primassure, who was the lucky winner of our prize draw. Ann was presented with a Pre-Paid Mastercard valued at $1000.

We Will Be Closed

Public Holidays

Please note our office will be closed for the following Public Holidays in April:

Friday 19th April   Good Friday
Monday 22nd April   Easter Monday

Thursday 25th April   ANZAC Day

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