

Making News at BAIS

Message from Managing Director – Jim Armstrong

We've hit the ground running with a very busy start to the year. We are currently completing extensive testing in preparation for the release of ibais and DesignBAIS version 7.

This release will be staggered over the next few months and the first site is already running live. We'll be in contact with more details once a release schedule has been finalised.

Some of the changes with this release include the move to .NET technology which enables ibais to be fully compatible with other popular browsers such as Chrome, Safari, Edge and Firefox. We have also taken the opportunity to update the system security profile to take account of the latest threats and we're looking at dual factor authentication to add another level of security.

In addition, we've added the ability to encrypt our databases and also to have transactions fully replicated to a separate server (please contact us if you are interested in these options.)

Have You Updated?

New Web Server

In March 2017 we issued details of our new Webservers via News@BAIS and other email communication. However, it appears we have some clients who are still using the old webserver (<https://designbais.bais.com.au/ibais/>) to connect to ibais.

This old address will be switched off in the near future so it is important that ALL staff are made aware and update their shortcuts and favourites to use the new address as soon as possible. The correct address to access ibais is: <https://ibais.com.au/ibais/>

When you update to the new address you need to ensure that your Internet Explorer settings are also updated. [Click here for instructions](#) on how to update these settings.

Important Notice

System Maintenance – ibais Unavailable

On Sunday 18th March we need to conduct routine maintenance on our main bureau server. This will require the system to be taken offline from approximately 8:00am to 2:00pm, during which time ibais will not be available.

It is important that we conduct this work to ensure that we maintain our systems at an optimal level and stay ahead of any potential issues. We understand that this may cause some inconvenience and we have scheduled it to minimize this as much as possible.



Please ensure that information about this maintenance down time is distributed to all staff who use ibais.

Our technicians will work as quickly as possible to reduce the amount of down time where possible. Thank you for your understanding and co-operation.

News@BAIS Contents

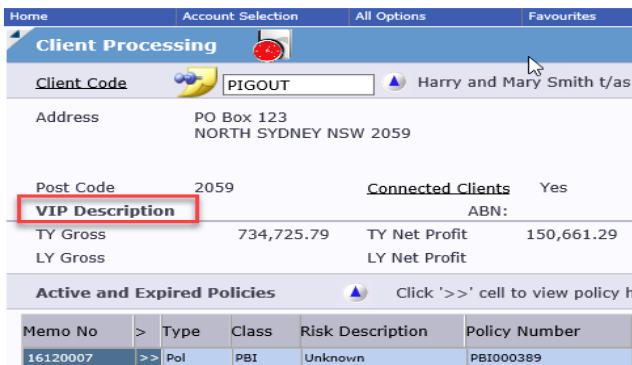
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Did You Know?

Handy Hints & Tips

Displaying VIP Description or Classification Code

If you would like to display either the VIP description or Classification/ANZIC Code from the Client Record when in the Client Processing screen this can be enabled. Log a support call and advise which of these two fields you want displayed and it will be enabled and will then display where shown below:



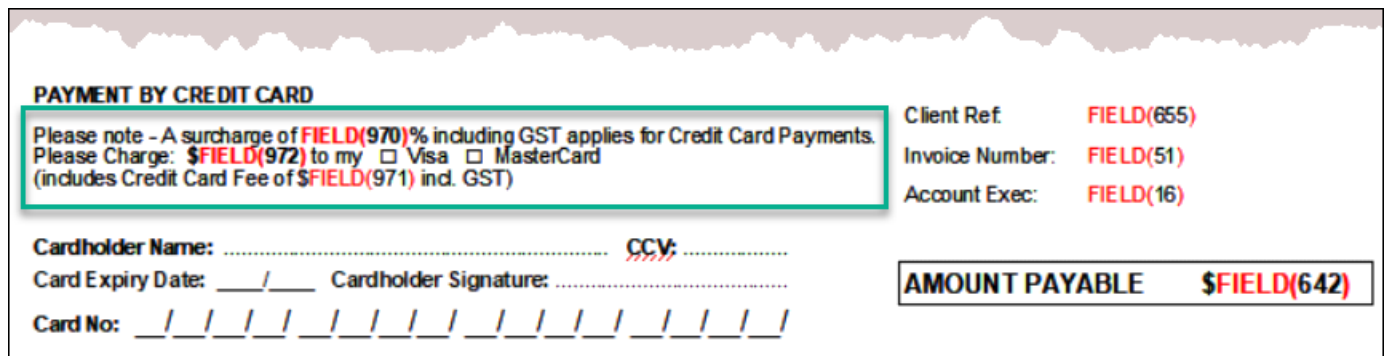
Creating Client Codes

Are you aware that some characters *cannot* be used if you are using Sunrise, SVU and/or any other third party system where we communicate via xml? This means that the following should be avoided:

- <
 - >
 - “
 - ’
 - &
- In addition, avoid copying and pasting where special characters might be inadvertently copied eg: Café
The accent on the e will cause issues.

Showing Credit Card Fees on Invoices

If you want to charge your client a credit card fee to cover your cost for these transactions you can include the % value, the \$ amount and the total payable (including the fee) on your invoice, similar to the example below:



Sydney Expo UAC

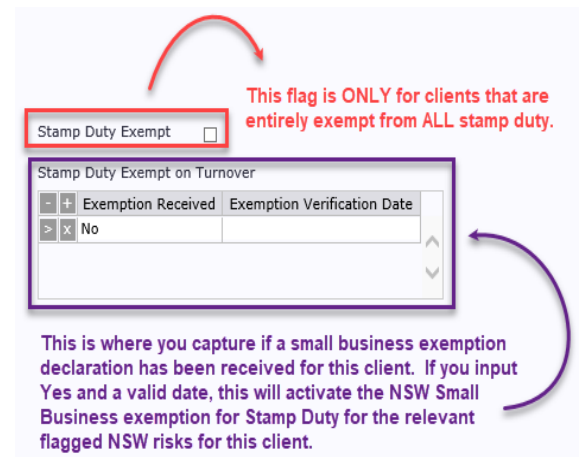
A PROUD MEMBER OF THE UNDERWRITING AGENCIES COUNCIL

On Friday 6th March our National Sales & Support Manager - Robert Stapleford - will be attending the Sydney UAC Expo at the Sydney Hilton. If you are going to be there be sure to find Robert and say hi!

Clarification

NSW Small Business Stamp Duty Exemption

There appears to be some confusion around the correct way to flag your exempt clients so that the new exemption will be applied correctly. Please refer to the screen shot below for the correct use of the Stamp Duty flags on the Client Maintenance screen:



Prizewinner 2017



Our prize winner, Ian Ferris from Your Insurance Brokers, enjoying his New Year’s Eve on Cockatoo Island and lunch at Bondi Icebergs which he won after visiting the ibais stand at the Steadfast Convention in 2017.



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



www.bais.com.au

Do You Have a Story?

Invitation



If you have a story to share of any 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.

Send an email with the details to sheri@bais.com.au with the subject line: News@BAIS Submission.

Getting to Know You

Staff Profiles

Glenn Eiszele

Glenn has been a member of our friendly Support Team for almost 10 years.



Outside of work Glenn is a musician in a band and enjoys photography and videography. He also has a penchant for Classic 50s – 70s Australian and American motorbikes and cars.

Coming Soon

New Software Under Development

A few enhancements we are working on:

- Background Funding
- Email Payment Reminders
- Rtf Schedules (already being piloted)
- Html Email Signatures

More details about these (and other) exciting developments will be published when they are ready for general release.