



ibs Release Note v23.7 rev. 2

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1. Introduction

1.1 Overview

This document contains a list of the changes that have been made as part of ibs v23.7.

1.1. Disclaimer

All developments are thoroughly tested by gpm in a range of test environments to ensure that ibs works as expected. This release of ibs is supported on versions of Windows and Office that are currently under support by Microsoft. We strongly recommend that all clients thoroughly test any new release within their own environment before going live.

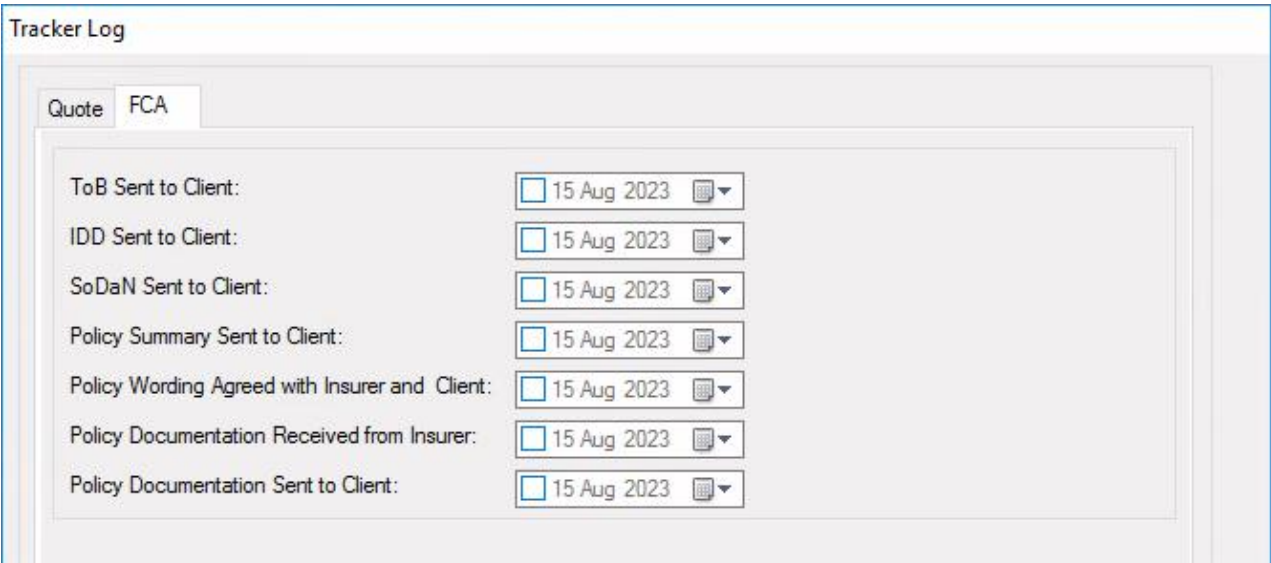
2. Enhancements

2.1 Accounting

2.2 Quote

FCA Tracker in Quote (ref. 10433)

ibs has been enhanced such that the FCA tab, previously only available on the Tracking screen within a risk, is now visible on the Tracking screen within a quote.



The screenshot shows a 'Tracker Log' window with two tabs: 'Quote' and 'FCA'. The 'FCA' tab is selected. Below the tabs is a table with two columns: 'Event' and 'Date'. The 'Event' column lists various milestones, and the 'Date' column shows dates, all of which are '15 Aug 2023'. Each date has a small calendar icon to its right.

Event	Date
ToB Sent to Client:	15 Aug 2023
IDD Sent to Client:	15 Aug 2023
SoDaN Sent to Client:	15 Aug 2023
Policy Summary Sent to Client:	15 Aug 2023
Policy Wording Agreed with Insurer and Client:	15 Aug 2023
Policy Documentation Received from Insurer:	15 Aug 2023
Policy Documentation Sent to Client:	15 Aug 2023

New bookmark for Cresta value (ref. 10522)

A new bookmark has been added to output the Cresta value associated with each location/address on a quote/risk.

Property Addresses: Only first 5 lines of address will be available for Bordereau output

Address1:	AMP House
Address2:	Dingwall Road
Address3:	Croydon
Address4:	Surrey
Address5:	

Post Code: CR0 2LX Country:

Prop Type: Commercial

CCY: GBP Premium Amount: 0.00

Add
Delete
<<
<
1 of 2
>
>>
Close

The bookmark name is SchLocCresta_n_X where n is the location/address number within the quote/risk.

Note: the Cresta field label can be amended by configuration and in the above example has been renamed to Prop Type. The bookmark name however remains as above.

New bookmark for IPT Rate (ref. 10762)

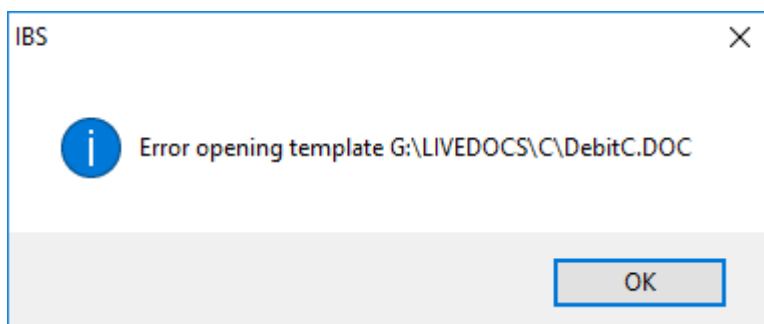
A new bookmark (IptRate) has been added for quote and risk documents containing the percentage rate of IPT applicable. Trailing zeroes in the decimal portion of the number will be removed. The bookmark will interrogate only the tax code configured as the 'core' IPT code.

2.3 Miscellaneous

Validation for existence of document templates (ref. 10080)

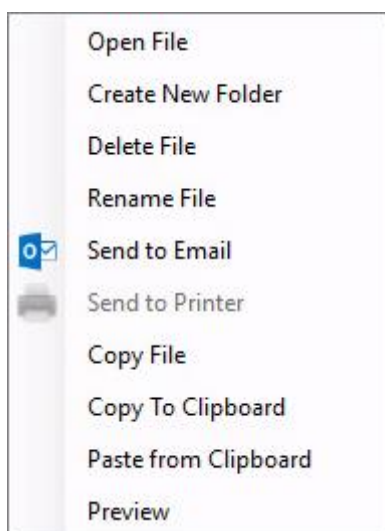
When creating documents in the following areas, validation will now check the existence of the required document template and if not found will display a suitable error message to the user.

Quote documents
 Policy/Premium documents
 Endorsement documents
 Claim documents



'Open File' option added to DMS document menu (ref. 10202)

To aid useability, a new Open File option has been added to the right-click menu for each document.



Access to ibs desktop when creating emails (ref. 10426)

Creation of emails from the quote, policy, claim and endorsement screens has been enhanced such that ibs can be accessed in addition to the email screen, allowing a user to visit, for example, the DMS to copy/paste documents into the email.

3. Corrections

Error 'Cannot read description for sub section' after changing CoB (ref. 9954)

Quote validation of the Class of Business and associated scheme details has been corrected such that the error 'Cannot read description for sub section' no longer occurs.

Auto Renewal error for property risks containing endorsements (ref. 10500)

The Auto Renewals function has been corrected such that an 'unhandled exception' error no longer occurs on property risks containing endorsements.



Unhandled Exception error when duplicating aircraft (ref. 10710)

ibs has been corrected such that the above error no longer occurs when copying an existing aircraft within a risk.

Error 30001 removing Commercial Property Scheme (ref. 10828)

ibs has been corrected such that 'error 30001' no longer occurs when deleting sections from a Commercial Property scheme.

Updating bookmark values to blank (ref. 10771)

ibs has been corrected such that bookmark values are now correctly removed from documents where the corresponding values in ibs are no longer populated.