



ibs Release Note v23.8 rev. 3

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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 v23.8.

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

Recent Used on Client Search (ref. 10580)

A Recently Used option has been added to the Client Search function. Pressing this button will display the standard Search Results screen containing a list of the most recently accessed client accounts:

A screenshot of the 'Client Search' dialog box. It features several input fields: 'Client Code' (a small box), 'Client Name' (a long box), 'Short Name' (a long box), 'Account Executive' (a dropdown menu), 'Post Code' (a small box), 'Contact Name' (a long box), 'Policy Number' (a small box), and 'Assured Name' (a long box). At the bottom, there are three buttons: 'Search', 'Recent Used' (which is highlighted with a red rectangular border), and 'Close'.

Client search results (5 records)

Client Code	Name	Address	Post Code	Status
00006	American Refining Group Inc	Chicago		Cancelled
A0001	A1 Insurance Agencies	Suffolk House	SS2 6LA	
A1234	A1 Insurance Brokers	1 Bromley High Street	BR1 2ER	
ABL01	Able Finance Services	Leadenhall Street		
GB001	Geoff Barden Agent Account	WeWork	EC2M 4PL	

Select Search Comments  Export Close

Note 1: the list of client accounts is recorded per user.

Note 2: If only one client account exists on the list then it will be opened automatically.

Note 3: The Client Search function has been corrected such that it allows access to client accounts only (Agent and Direct).

2.2 Miscellaneous

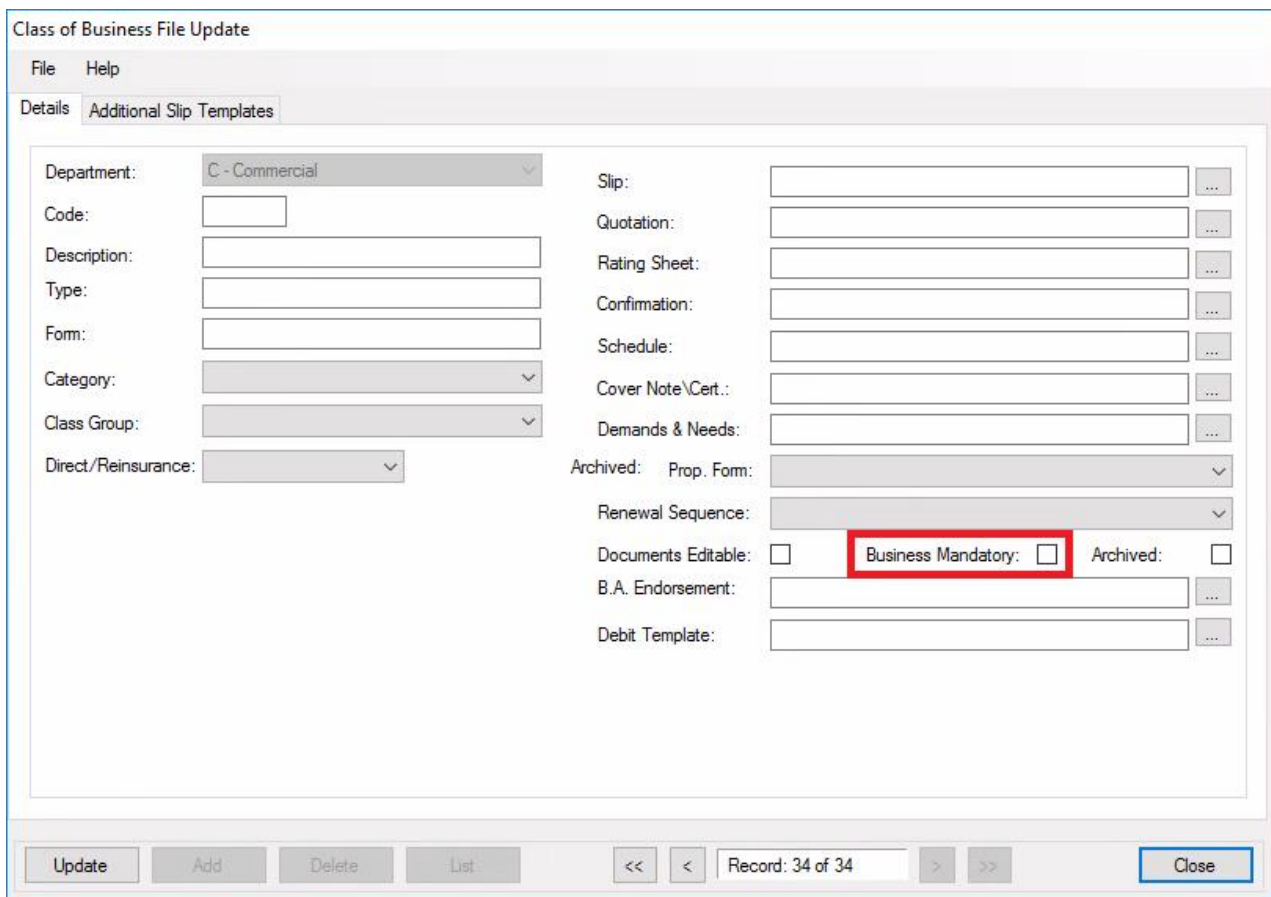
Scheme Performance Improvements (ref. 11084)

Further performance improvements have been implemented on the Schedule screen within a quote and risk, specifically when returning from the Property Sections screen to the Schedule screen.

2.3 Risk

Mandatory Business Description on Quote and Risk (ref.10635)

It is now possible to mandate entry of a Business Description value on a quote and risk. This functionality can be activated per Class of Business by ticking the Business Mandatory setting on the Class of Business record:



Class of Business File Update

File Help

Details Additional Slip Templates

Department: C - Commercial

Code:

Description:

Type:

Form:

Category:

Class Group:

Direct/Reinsurance:

Slip:

Quotation:

Rating Sheet:

Confirmation:

Schedule:

Cover Note\Cert.:

Demands & Needs:

Archived: Prop. Form:

Renewal Sequence:

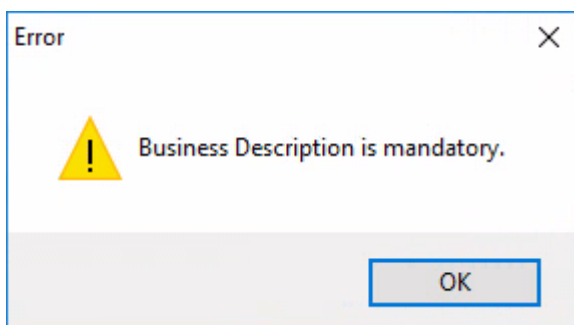
Documents Editable: ☐ Business Mandatory: ☐ Archived: ☐

B.A. Endorsement:

Debit Template:

Update Add Delete List << < Record: 34 of 34 > >> Close

For Classes of Business where this setting is ticked, quotes and risks will validate that a value is present in the Business Description field:



Error

Business Description is mandatory.

OK



Display 'core' Class of Business Code (ref. 11081)

The core Class of Business code selected at the time of risk creation is now displayed in the Risk Summary screen.

3. Corrections

Convertible currency premium amounts on Bordereau (ref. 10458)

The following bordereau reporting fields have been corrected for convertible currency transactions:

- Nett (ex Tax)
- Nett (ex Tax) Sett
- Nett (inc Tax)
- Nett (inc Tax) Sett
- Gross (inc Tax)
- Gross (inc Tax) Sett
- Tax (Amount)
- Tax (Amount Sett)

Bordereau output for Profit Commissions (ref. 10669)

The Bordereau function has been corrected such that Profit Commission transaction are accurately presented on the Bordereau Transaction Summary screen and the Excel bordereau. The Commission percentage and amount will no longer appear as doubled.

Commercial Property Bookmarks (ref. 10834)

'Property Commercial' scheme/schedule bookmarks for risks with 'Property' Class of Business are now output irrespective of the Class of Business on the individual sections of a risk. Previously the bookmarks were not populated if the first section of the risk contained a Class of Business not set as 'Property'.

Complaints (ref. 10966)

The Complaints tab on the Account Code screen has been corrected to enable the dropdown fields to be correctly populated when adding a new complaint. A spelling correction 'Dirrector' has also been corrected.

Amend Slip on endorsement (ref. 10916)

The Amend Slip function within an endorsement has been amended such that the slip file extension is now sought from the main Class of Business on the risk rather than that of the selected section.