



ibs Release Note v24.11 rev 1



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1. Introduction

1.1 Overview

This document contains a list of the changes that are included in ibs v24.11.

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 Administration

No changes.

2.2 Accounting

BSM Processing Error Messages (ref. 13670)

The validation of BSM data has been revised such that scenarios that are for information purposes are no longer reported as errors that require GPM assistance. Previously all information, warnings and errors were reported as requiring GPM assistance.

2.3 Claim

No changes.

2.4 Miscellaneous

No changes.

2.5 Quote

No changes.

2.6 Reporting

Speed of CSV output file creation (ref. 13734)

The performance of creation of CSV output files for Ledger, Ledger Sequence and Premium files has been significantly improved.

Business Description added to Quote CSV output file (ref. 13716)

The Business Description value has been added to the Quote CSV output file.

Details for Quotation - 01257

Assured Details Schedule Conditions Taxes Brokerage Subjectivities

Inception Date: ☒ 27 Nov 2024 ☐ Inception Time: 00:00:00 Renewal Date: 27 Nov 2025

Expiry Date: 26 Nov 2025 Expiry Time: 23:59:59 Time Zone:

Period: 12 Months at 27th Nov 2024

(Re)Insured: Daisy Smith

Original Insured:

Risk Address: The Queen Vic Walford

Post Code: E1 1AA

Postal Address:

Business Description:

Proposal Date: ☐ 27 Nov 2024

New/Renewal: Platforms:

Reason for NTU:

Reason:

Estimated Brokerage: CCY:

Likelihood of takeup:

Add Address

Mailing Post Code:

Connection:

Update Close

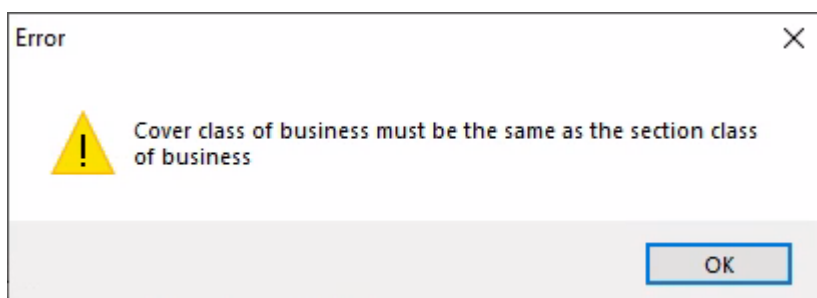
New CSV output file for outstanding ledger postings (ref. 13696)

A new CSV output file is now available containing just outstanding/unmatched ledger postings. The columns included are identical to the main Ledger CSV output file.

2.7 Risk

Validation of Cover Class of Business (ref. 13729)

Additional validation has been added to the Policy Section Details screen within a risk to ensure that the Class of Business selection for each Cover on the section matches the Class of Business value of the section.



Note that for new unsaved risks, ibs still allows covers to be added with different Class of Business values which, when the risk is subsequently saved, results in a separate section being created for each Class of Business.

Auto Renewals – open new Quote or Risk (ref. 13523)

New buttons have been added to the Auto Renewals screen to allow the renewal quote or renewal risk to be opened directly from the Auto Renewals screen.

Renewals

Renewal Date Range
 Start Date: 01 Feb 2025 End Date: 01 Feb 2025

Account Handler
 [Dropdown]

Department/Sub Division
 Department: All Sub Division: All
 Class of Business: All

Client Search
 [Text Box] [Search]

Lapsed and Renewed
 Display Lapsed Policies: ☐
 Display Renewed Policies: ☐
 Display Renewed Policies Not Debited: ☐

Retrieve Results

Policy No	Select	Inception Date	Expiry Date	Assured	Original Insured	Agent	Business Description	Quote No	New Policy	Cover
C240615		01 Feb 2024	31 Jan 2025	XYZ Aviation Ltd		B0003				
C240950		01 Feb 2024	31 Jan 2025	Pantheon Test Assured		BWIL				
C240951		01 Feb 2024	31 Jan 2025	Pantheon Test Assured		BWIL				
C240952		01 Feb 2024	31 Jan 2025	Pantheon Test Assured		BWIL				
C240973		01 Feb 2024	31 Jan 2025	Toby Jug Limited		CHR01				
C240974		01 Feb 2024	31 Jan 2025	ABC Insured Company		B0003				
C240975		01 Feb 2024	31 Jan 2025	ABC Insured Company		A1234				
C240977		01 Feb 2024	31 Jan 2025	ABC Insured Company		A1CL2				
C240978		01 Feb 2024	31 Jan 2025	ABC Insured Company		A1CL2				
C240979		01 Feb 2024	31 Jan 2025	ABC Insured Company		A1CL2				
C240980		01 Feb 2024	31 Jan 2025	ABC Insured Company		A1CL2				
C240981		01 Feb 2024	31 Jan 2025	ABC Insured Company		A1CL2				

Select All Unselect All View Edit Renewal Comments Amend Renewal Cover Lapse Export View New Policy View New Quote Close

Produce Renewal Quote for Selected Produce Renewal Policy for Selected Admin Change Print Invitation Letters Selected All Print Chase Letters Selected All

3. Corrections

Premium error when Maximum Admin Fee set to blank (ref. 13693)

If the Maximum Fee Amount value on the Fee Accounts screen was set to blank then an unhandled exception error would occur when attempting to debit a premium. This issue has been resolved (the Maximum Admin Fee value will be saved as 0.00 if left blank).

Fee Accounts

Account: Default Value: Display Name:

Admin Fee: PLB001 0.00 Admin Fee

Policy Fee: PLB001 0.00 Policy Fee

Charity Donation: [Text Box] [Text Box]

Maximum Admin Fee: 0.00

Update Close

Internet Receipts error (ref. 13731)

The Internet Receipt function has been corrected such that it can be accessed correctly.

**Signed Line Calculation (ref. 13757)**

Validation was added in v24.9 to ensure that the sum of signed lines within a section does not exceed the Order to Close value. However in some circumstances the sum of signed lines was being incorrectly calculated, resulting in a failure of this validation and the user being unable to exit the section screen. This issue has been resolved.

Account Code Update screen (ref. 13765)

The Account Executive and Credit Controller labels have been corrected. Their locations had been erroneously reversed in v24.7.