BIS PLATFORM

User Manual

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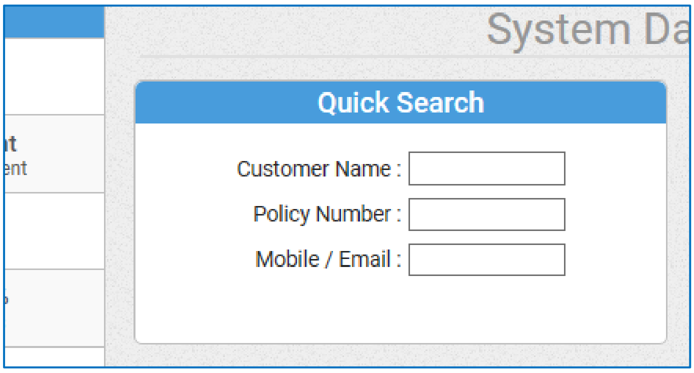
Client Management

Searching for Existing Client

Once logged into BIS Platform, on the home page there will be a search box on the top left corner of the screen.

If you click into the search box and press “**Enter**” on the keyboard your entire client bank will appear.



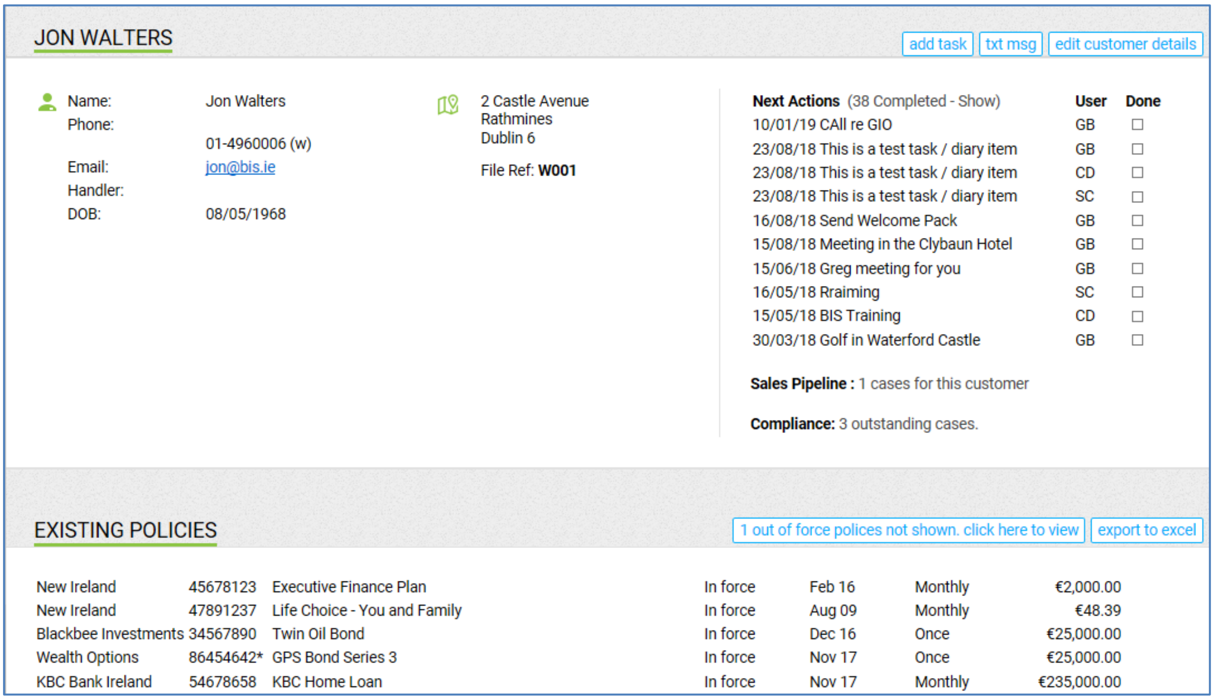
Simply scroll down through the list until you find your respective client.

Alternatively, if you type the first name, surname or part of a client name into the search box, the relevant Client will automatically appear.

Client Profile

Click on a client’s name to enter the client profile.

This is where all the information on the client is stored.



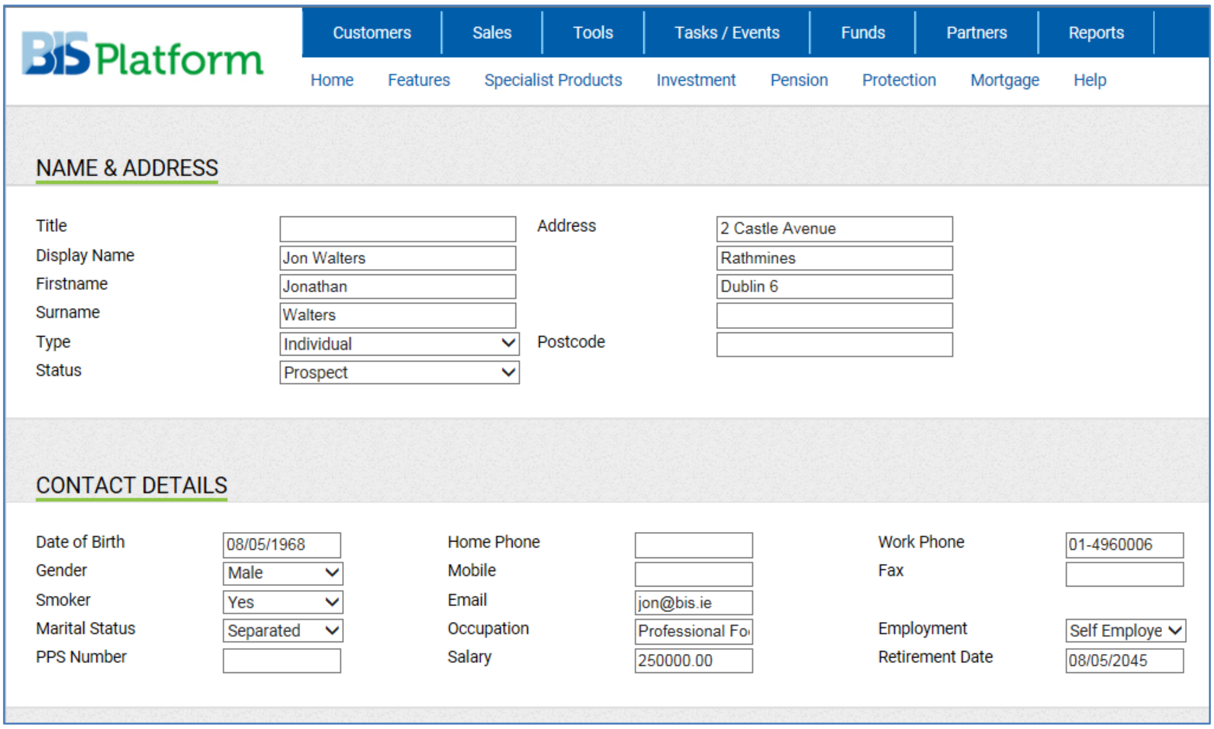
Adding a Client

On the homepage of the BIS platform you will see on the top tool bar under "**Customers**" there is an option to "**Add New Customer**"

Simply enter the details required and click "**Create New Customer**" in the actions panel on the right hand side and the client will be added to the system.

Editing a Client's Details

Clicking on a client's name brings you into their client profile.



Within a client's profile there will be a link called "**Edit Customer Details**".

Simply click on this link and any changes you make can be saved for future reference.

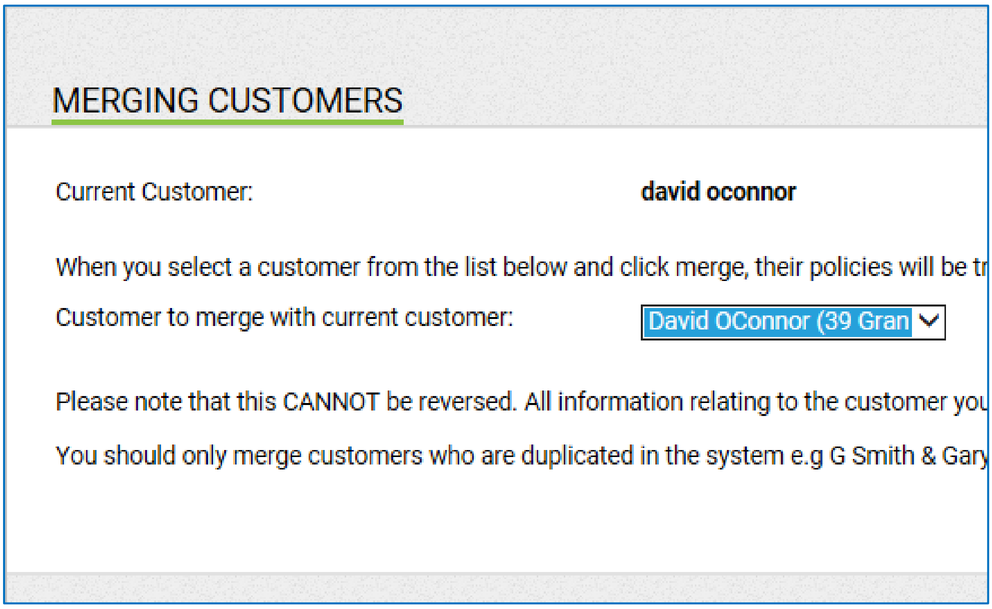
Merging a Client's Details

If there are multiple occurrences of the same client, you can use the merge facility to ensure only one occurrence remains.

Firstly, select the correct entry of a particular client whom has numerous entries.

Then from within a client's profile click "**Edit Customer Details**"

Then click "**Merge Customers**" in the actions panel on the right hand side of the screen to get a full list of all clients.



Then simply select the corresponding entry of the client whose contact details are incorrect.

Once you click "**Merge**" all policies will appear under once client entry with the correct contact details being displayed.

(This may have to be repeated if multiple occurrences of a client appear)

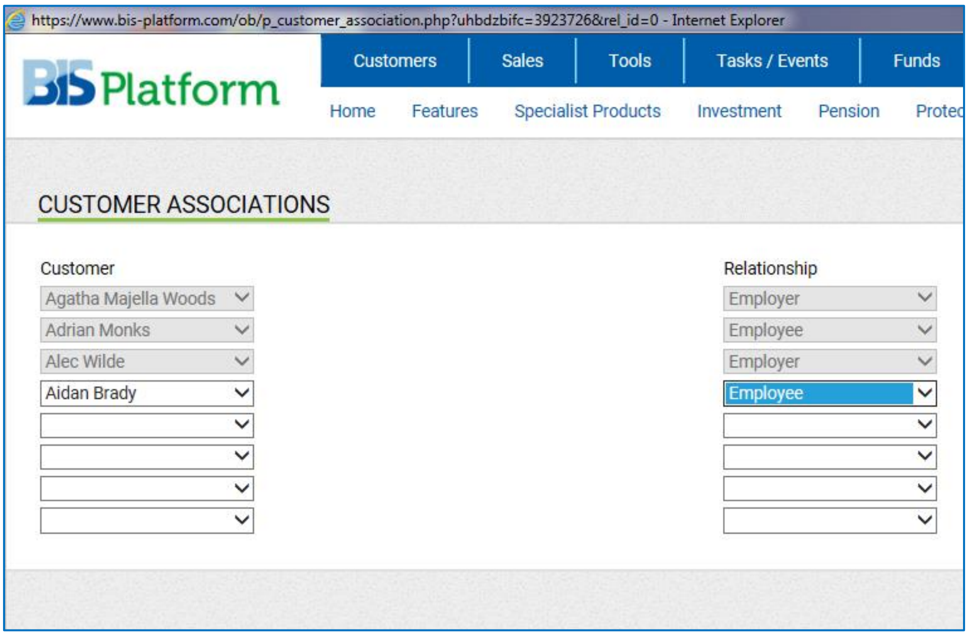
Creating an Association/Link between Clients

If two clients are named on a policy, then the association between both will automatically occur.

However, if there is an alternative relationship between two clients, such as family member or friend, you can manually create the association.

From within a client's profile, simply click "**Edit**" beside "**Associate Clients**" and select the respective client and relationship.

This will bring you to a page where you can browse through your client list and choose the customer you wish to make an association with.

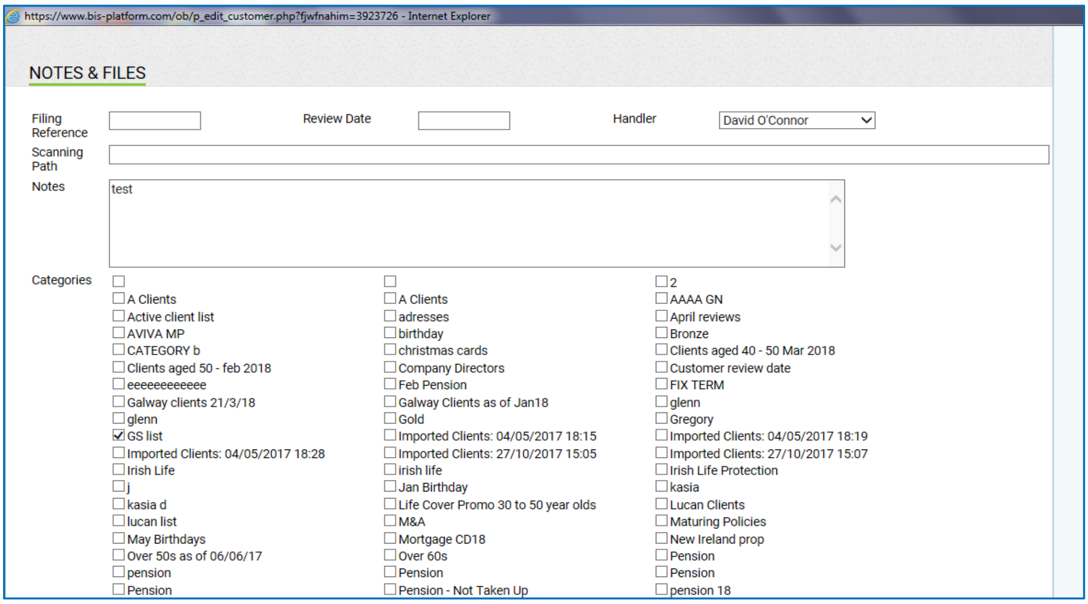


Once you have made the association, click "**Save details**" in the actions panel on the right hand side of the screen, to store it in the system.

Leaving Notes about a Client

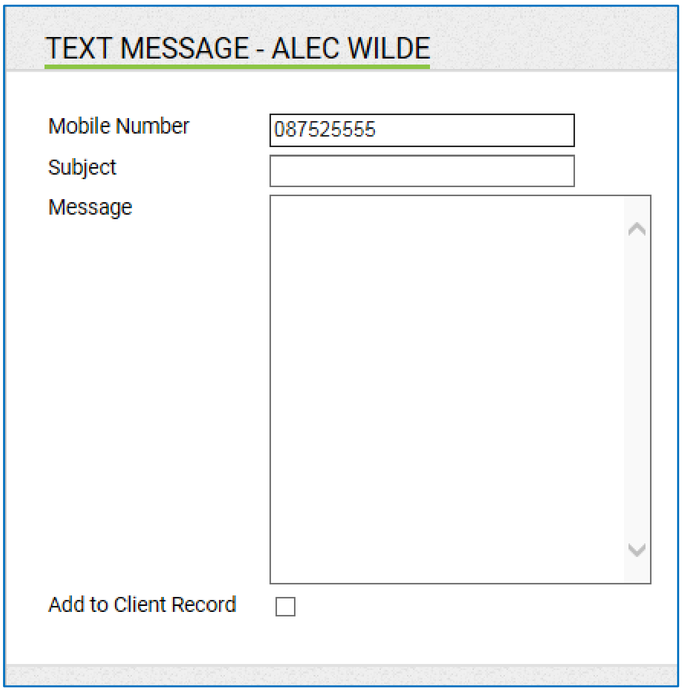
From within a client profile, click on “**Edit Customer Details**”.

Then in the “**Notes & Files**” section simply add the necessary information and click “**Save Details**” to record the updates.



Text Messaging a Client

From within the client profile click “**txt msg**”.



Enter the client’s number, the message subject and then the message you wish to send or, alternatively, choose a template by clicking “**Message Templates**” in the actions panel on the right of the screen.

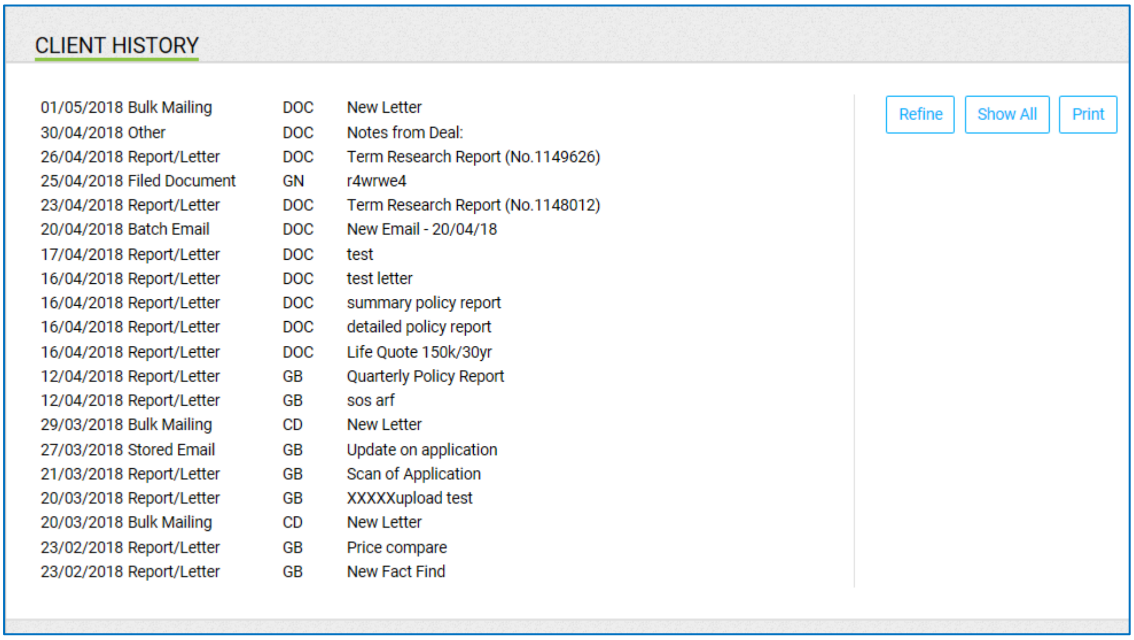
Then click “**Send Message**” in the actions panel.

Recording Correspondence with a Client

The BIS Platform allows you to record any correspondence with a client to be stored in the respective client's profile for future reference.

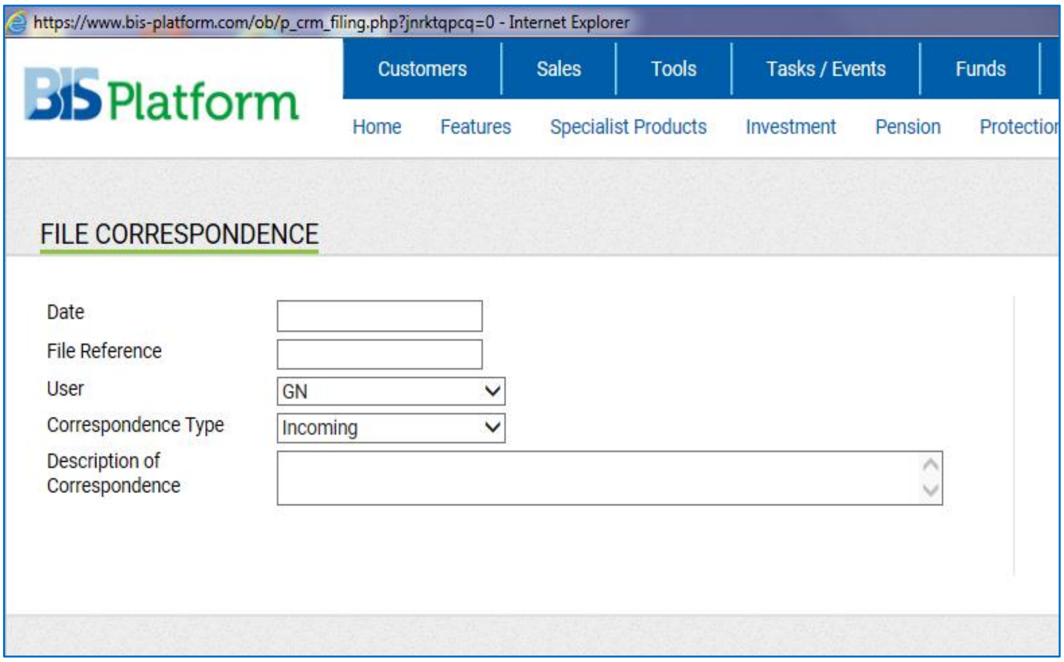
From within a client profile click on "**Client Notes**" in the Actions panel on the right hand side of the screen.

This will show you client history and policy notes.



01/05/2018 Bulk Mailing	DOC	New Letter
30/04/2018 Other	DOC	Notes from Deal:
26/04/2018 Report/Letter	DOC	Term Research Report (No.1149626)
25/04/2018 Filed Document	GN	r4wrwe4
23/04/2018 Report/Letter	DOC	Term Research Report (No.1148012)
20/04/2018 Batch Email	DOC	New Email - 20/04/18
17/04/2018 Report/Letter	DOC	test
16/04/2018 Report/Letter	DOC	test letter
16/04/2018 Report/Letter	DOC	summary policy report
16/04/2018 Report/Letter	DOC	detailed policy report
16/04/2018 Report/Letter	DOC	Life Quote 150k/30yr
12/04/2018 Report/Letter	GB	Quarterly Policy Report
12/04/2018 Report/Letter	GB	sos arf
29/03/2018 Bulk Mailing	CD	New Letter
27/03/2018 Stored Email	GB	Update on application
21/03/2018 Report/Letter	GB	Scan of Application
20/03/2018 Report/Letter	GB	XXXXXupload test
20/03/2018 Bulk Mailing	CD	New Letter
23/02/2018 Report/Letter	GB	Price compare
23/02/2018 Report/Letter	GB	New Fact Find

From here click "**File Correspondence**" in the actions panel on the right hand side of the screen to record a correspondence with the client then click "**Save Contact**" to store it.

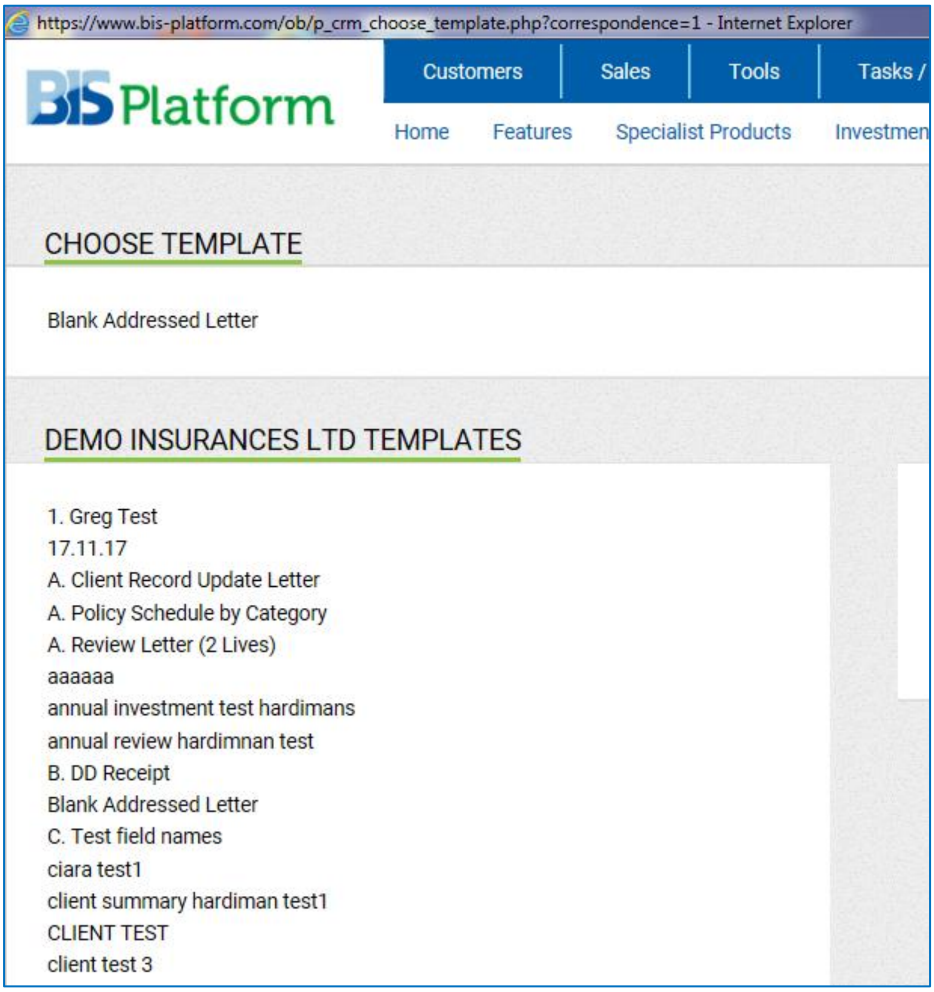


Creating Correspondence

From within the client profile, click on “**Client Notes**” in the actions panel on the right hand side of the screen.

On the next page, click “**Client Correspondence**” in the actions panel.

This will bring you to a page with a wide variety of templates you can use, or, alternatively create your own templates, or just stick with a blank addressed letter.



Clicking “**Blank Addressed Letter**” will automatically download and appear as a word document.

Product Research

In the top bar of the home screen you will see a number of options with drop down menus providing a range of products.

Hover the curser over any of them for the drop down menus of products.

This will allow you to browse through the products,

The sections are: -

- **Specialised Products**
  These are a range of bonds whose design does not fit the traditional type of intermediary products.

- **Investment**
  Unit linked bonds, Deposit bonds, Regular savings etc.

- **Pension**
  Regular premium, Single premium, ARMF etc.

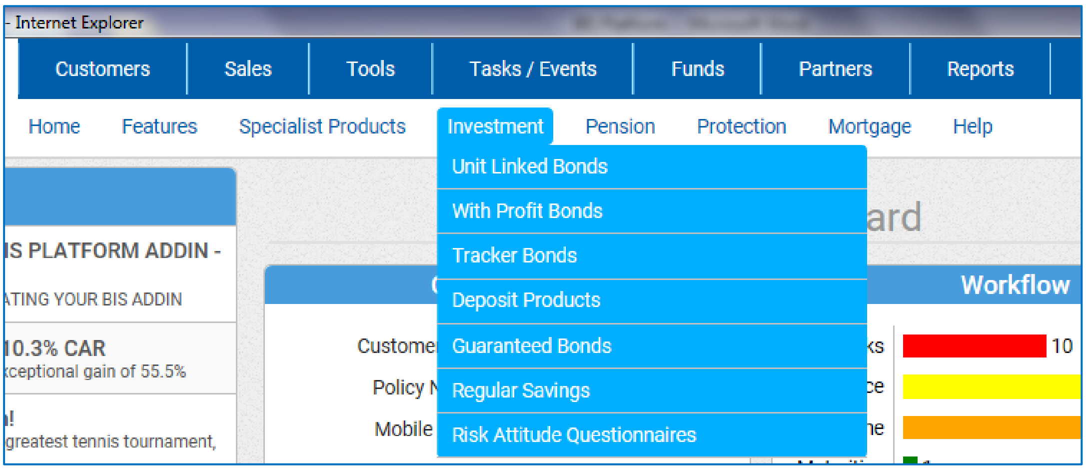
- **Protection**
  Term quotes, Illness cover, Income protection etc.

- **Mortgage**
  Mortgage rates, Re financing calculator, Overpayment calculator etc.

Hover the curser over any of these, and you will be given a variety of products to choose from.

Clicking on any of these options will bring you to a page with all the products available on the market.

To see the full information on a product just click the product name.

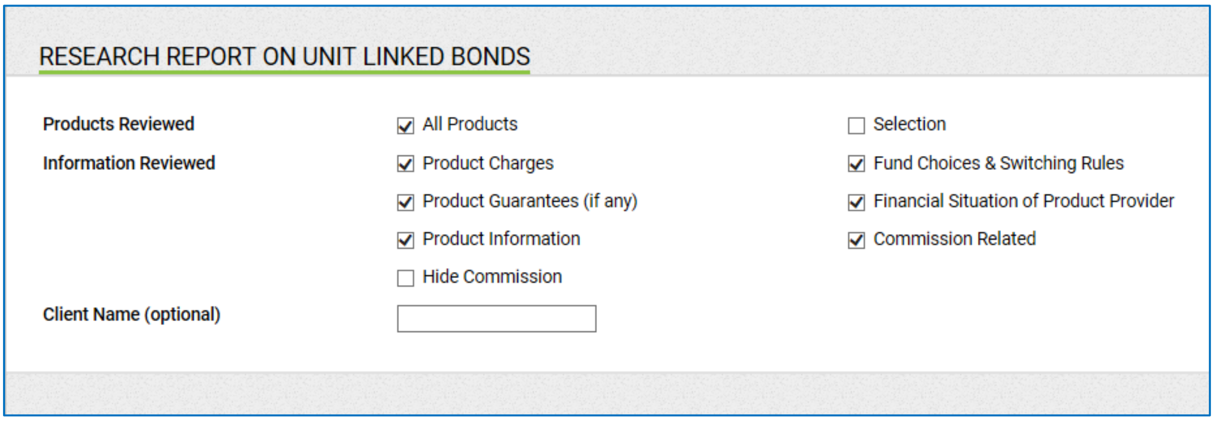


Research Report

To produce a research report for your client file, simply click "**Research Report**" in the actions panel on the right hand side.

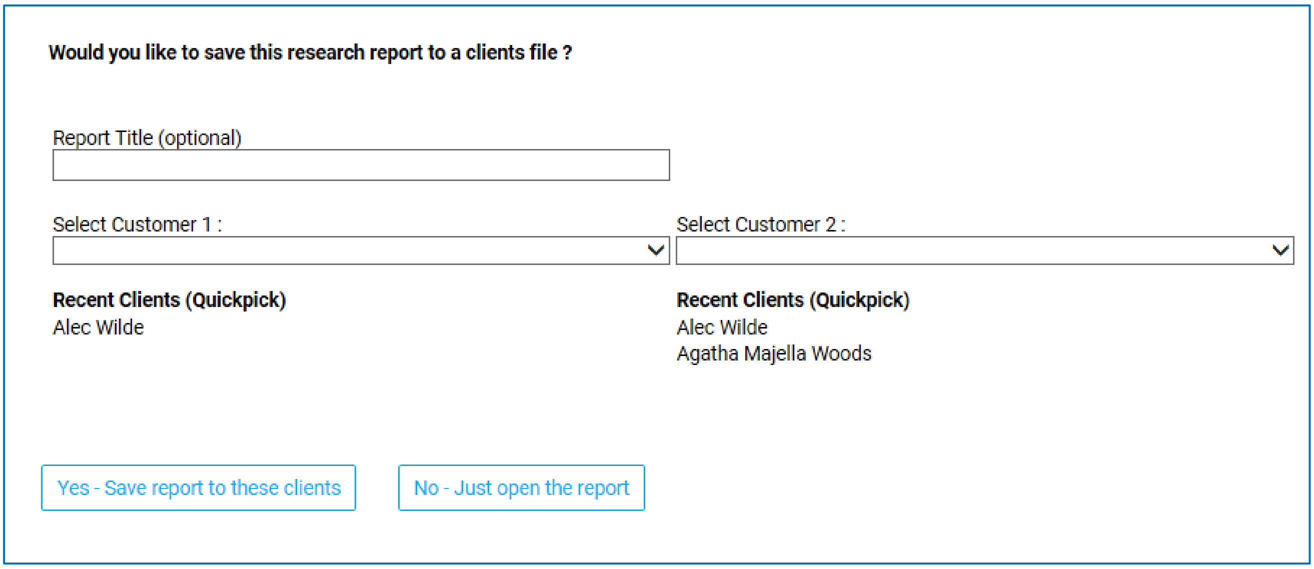
Tick the boxes beside "**Products Reviewed**" to add the products you wish to show in your report.

Tick the boxes beside "**Information Reviewed**" to select which information you wish to include, such as, product charges and product guarantees etc.



Then click "**Create Report**" in the actions panel on the right hand side of the screen.

This will allow you name the report and select which customers you wish to save it to, as shown below.



Projected Value

To see the projected value of the product, click “**Projected Values**” in the actions panel on the right hand side of the screen.

This will give you an option to enter the “**Investment Amount**” and “**Commission**” and calculate the project value of the product in 5 and 10 years.

PROJECTED VALUES

Investment Amount: 50000 Commission Level: Standard

PRODUCT PROJECTIONS

Provider	Product Name	5 yrs	10 yrs	Comm %
Aviva	Investment Bond (Option C3)	57,338	68,418	5%
Aviva	Investment Bond (Option C2)	57,233	68,395	5%
Aviva	Investment Bond (Option C1)	57,128	68,371	5%
Aviva	Investment Bond (Option B)	57,267	67,987	5%
Aviva	Investment Bond (Option A)	57,774	68,072	5%
Aviva	Easy Access Investment Bond (Option D1)	57,458	68,233	5%
Aviva	Easy Access Investment Bond (Option D2)	57,397	67,591	5%
Friends First	Conductor Investment Plan (Option A)	57,952	68,527	4%
Friends First	Conductor Investment Plan (Option B)	57,634	68,688	4%
Friends First	Conductor Investment Plan (Non-financed)	57,549	68,570	4%
Irish Life	Signature Bond	58,150	68,552	3%
Irish Life	Signature 2 Bond	57,458	68,233	3%
New Ireland	Smart Funds (Base AMC: 1%)	57,962	68,312	4%
New Ireland	Smart Funds (Base AMC: 0.875%)	57,807	68,398	4%
New Ireland	Smart Funds (Base AMC: 0.75%)	57,648	68,479	4%

From here you also have the option to produce a specific research report including the projected values.

Just click “**Quote Specific Research Report**” in the actions panel on the right to create the report.

For further information, click “**Extended Information**” in the actions panel.

This will bring you to a page showing you product information such as the managing charge and allocation rate.

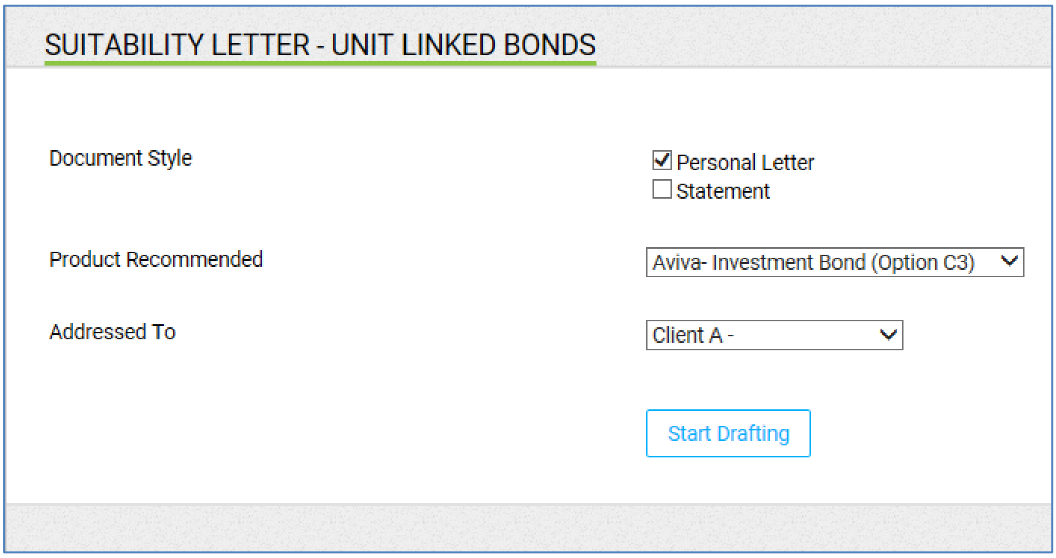
Statement of Suitability

To create a Suitability Letter, click “**Statement of Suitability**” in the actions panel on the right hand side of the screen.

This will allow you to choose the style in which you compose the document, either a personal letter or a statement.

Next choose the product you are recommending and which client you are addressing it to.

Once you have completed the details click “**Start Drafting**” below.



This will bring you to “**Introduction**”.

You can write your own introduction or choose one of the templates provided. (Text in the templates is amendable, and you can save any template you write for future use)

Finish your introduction and press “**Next Section**” in the actions panel on the right hand side of the screen.

Next is the “**Needs and Objectives**” section.

As with the previous section you may write your own text or choose from the templates provided.

Do this in each section and continue by clicking “**Next Section**” in the actions panel until you have completed your statement of suitability.

Once completed, your letter will automatically appear as word document.

As shown below:

Client A

25th June 2018

Important Notice – Statement of Suitability

This is an important document which sets out the reasons why the product(s) or service(s) offered or recommended is/are considered suitable, or the most suitable, for your particular needs, objectives and circumstances.

Dear Client

Introduction

Thank you for taking the time to meet with me and discuss your financial planning requirements. Following my research during which I carried out a fair analysis of the market, I have identified Investment Bond (Option C3) from Aviva as the most suitable product to meet your current requirements.

Needs and Objectives

You wish to provide an income of EURxxx from this investment.

To supplement your current pension arrangements, you have a lump sum of EURxx,xxx to contribute towards an investment fund.

Your objective is to reach a target fund of EURxx,xxx in X years.

Personal Circumstances

You are XX years old.

You are self-employed and your occupation is

You are a Company Director of XX

You are employed by XX

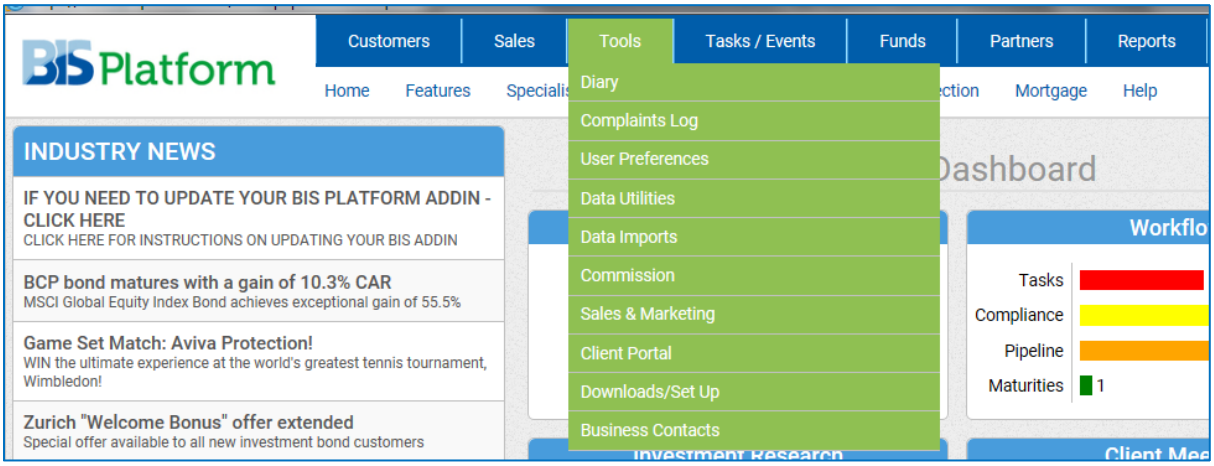
You are married to X with X children.

You are married to X and have no children.

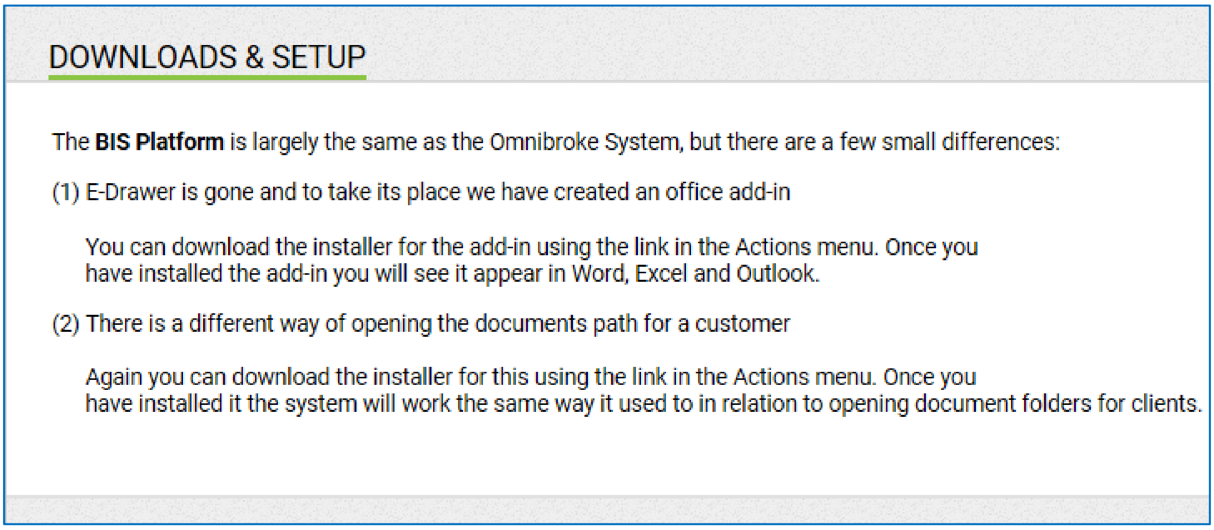
Document Management

When you first open up the BIS Platform make sure you download the add ins.

On the home page you will see "**Tools**" on the top of the screen.



Hover the curser over "**Tools**" and click "**Downloads/Setup**".



Click "**Office Admin** (**Platform**)" in the actions panel to download the MS add-in.

Click "**Scanned Docs Uploader**" to download the add-in for uploading scanned documents

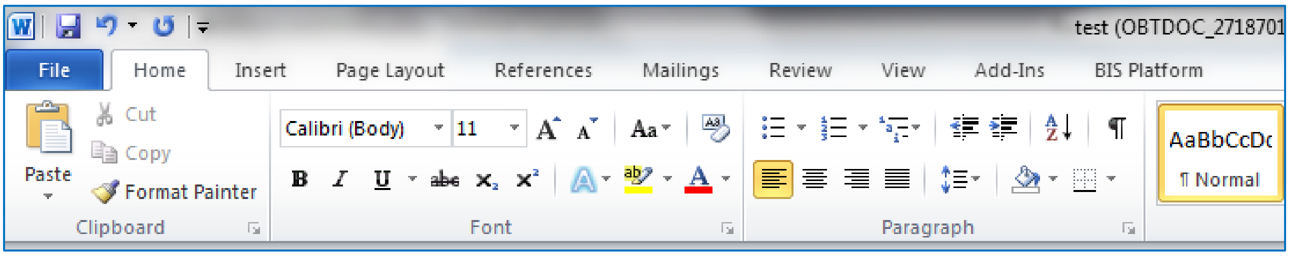
This will automatically download the installer.

Click "**Run**" to install the software.

Once installed, you will see it in **Excel**, **Word**, and **Outlook**.

Word

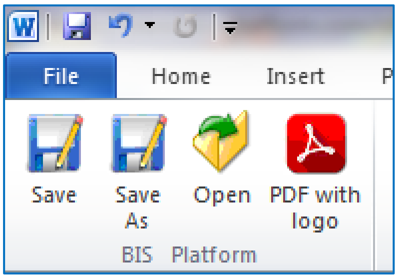
From within Word you will see “**BIS Platform**” at the top right of the screen.



When you have completed your word document, click on “**BIS platform**”.

This will give the options:

- **Save**
  Clicking save simple saves the document to your PC.
- **Save as**
  Clicking save as will bring up your client list and allow you to save the document to a client’s profile within the platform
- **Open**
  Clicking open allows you to open the file within the platform
- **PDF with logo**
  Clicking PDF with logo allows you to open the file as a PDF containing a logo of your choice



Excel

From within Excel you will see “**BIS Platform**” at the top right of the screen.

In Excel you will be given the options to save to your PC/Client profile, save as to client profile, or open in client profile.

Outlook

From within Outlook you will see “**BIS Platform**” at the top right of the screen.

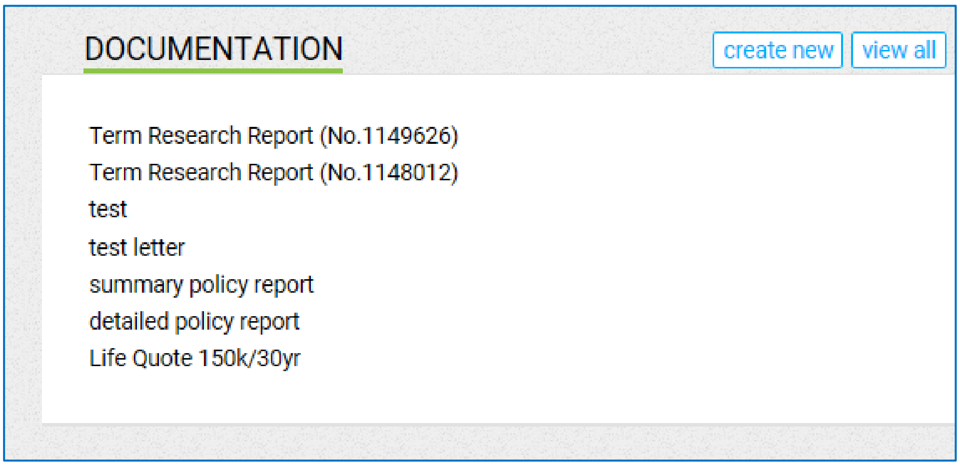
In Outlook you will have the option to save an email to the client profile or to “**Save & Send**” to send the email while also saving it to the client’s profile.

When you have completed your document in any of these programs, click on “**BIS Platform**”.

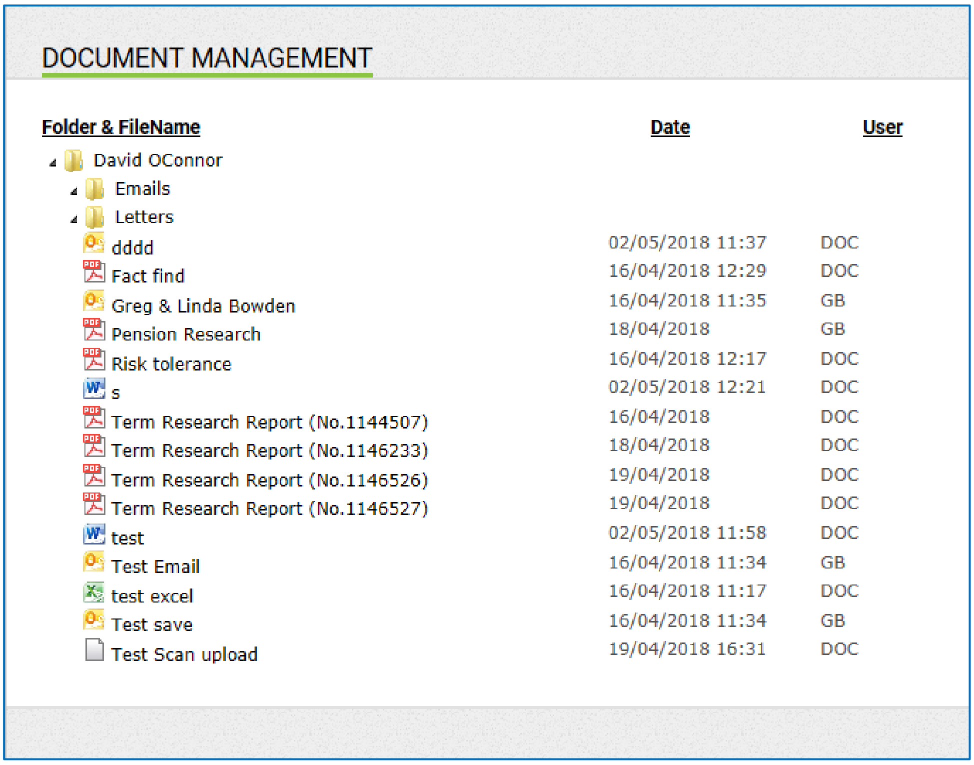
This will allow you to save your document to a client and will appear in the client profile under “**Documentation**”.

Documentation

From a client's profile, on the bottom left of the screen, you will see "**Documentation**".



Click "**View All**" This will bring you to a page that will show you any documents that you have saved to the client or have uploaded form your PC.


DOCUMENT MANAGEMENT

Folder & FileName	Date	User
David OConnor		
Emails		
Letters		
dddd	02/05/2018 11:37	DOC
Fact find	16/04/2018 12:29	DOC
Greg & Linda Bowden	16/04/2018 11:35	GB
Pension Research	18/04/2018	GB
Risk tolerance	16/04/2018 12:17	DOC
s	02/05/2018 12:21	DOC
Term Research Report (No.1144507)	16/04/2018	DOC
Term Research Report (No.1146233)	18/04/2018	DOC
Term Research Report (No.1146526)	19/04/2018	DOC
Term Research Report (No.1146527)	19/04/2018	DOC
test	02/05/2018 11:58	DOC
Test Email	16/04/2018 11:34	GB
test excel	16/04/2018 11:17	DOC
Test save	16/04/2018 11:34	GB
Test Scan upload	19/04/2018 16:31	DOC

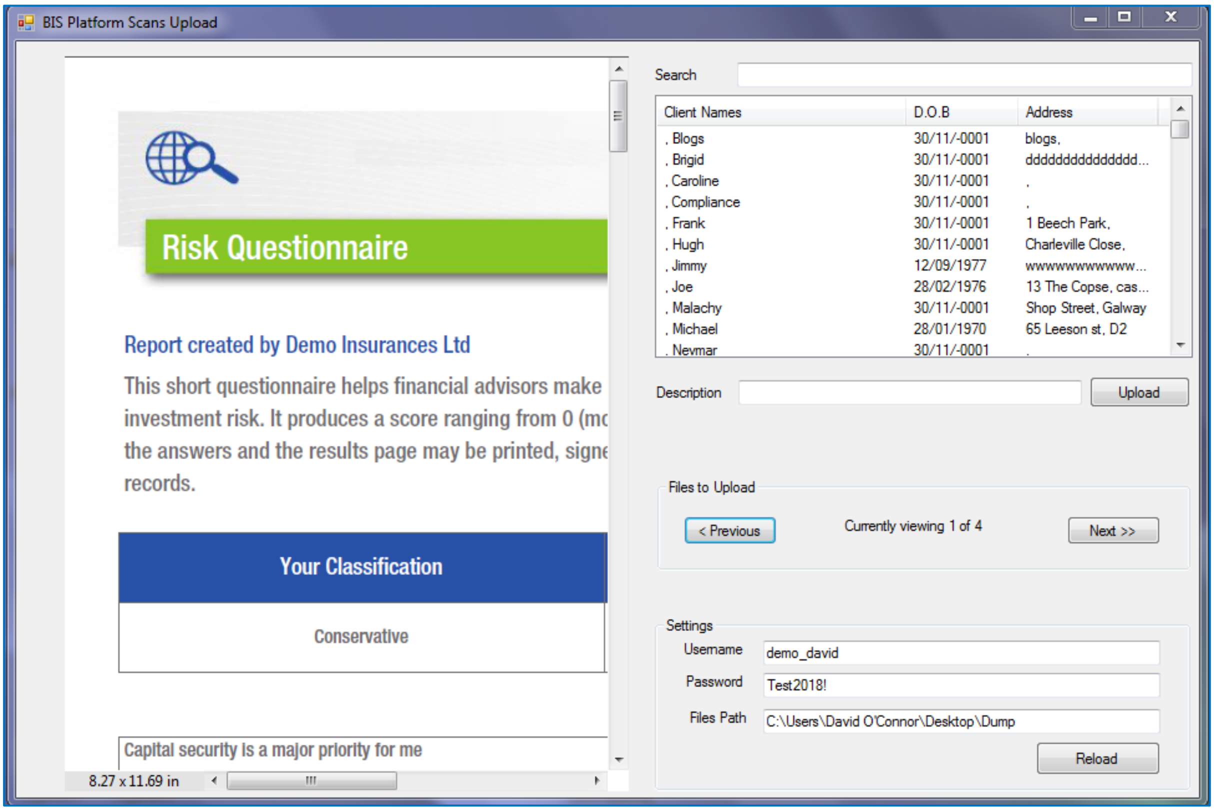
If you wish to upload a document from your PC, just click "**Upload Files** "in the actions panel, on the right hand side of the screen.

This will allow you to browse your pc to choose a file to upload.

Scanned Documents

The BIS scan uploader allows you to scan documents and upload the on to the platform.

Once you have scanned the document onto your PC, open ”**BIS Platform Scans Uploader**” on your desktop.



Copy and paste the file location of your scanned documents folder into “**Files Path**” box on the scans upload program.

In the top right you can search your client database.

Once you find the client you want to save the document to, click on their name.

Once you have chosen your client you can name the file in the “**Description**” box and click upload.

This will upload the file to the BIS platform and be saved in the Client Profile.

You can then find the file in the Client Profile under “**Documentation**”

Fact Finds and Needs Analysis

Creating a Fact Find for a Client

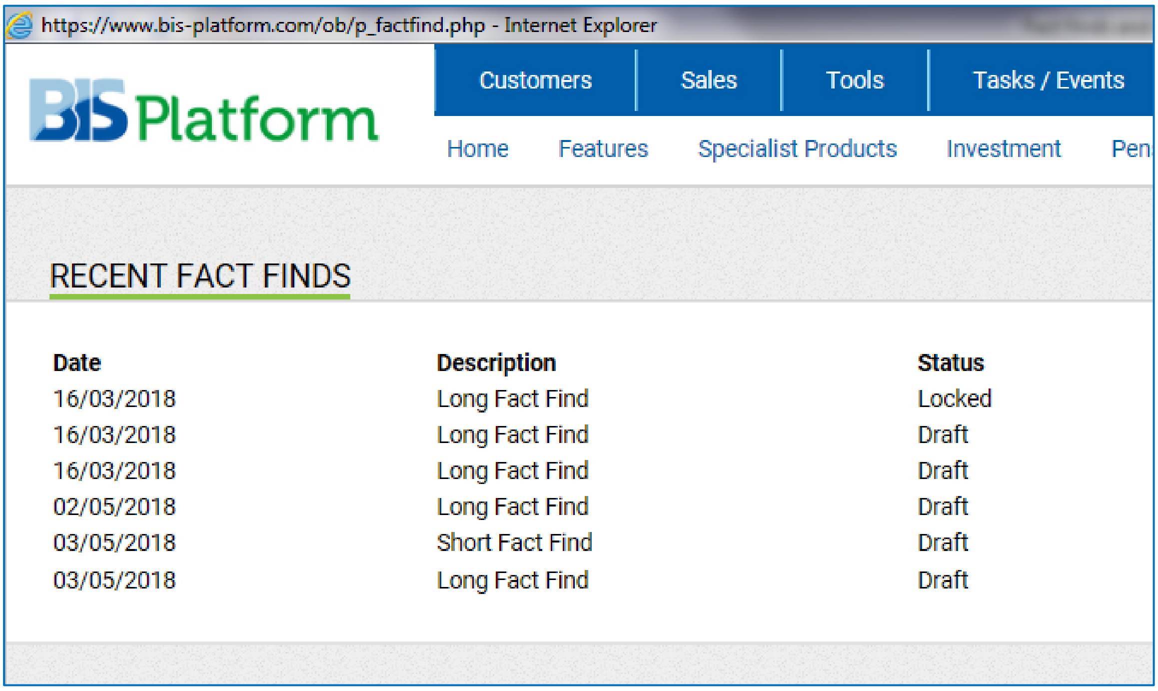
You can create fact find for a client and there are two different types to choose from,

- **Short Fact Find**
- **Long Fact Find**

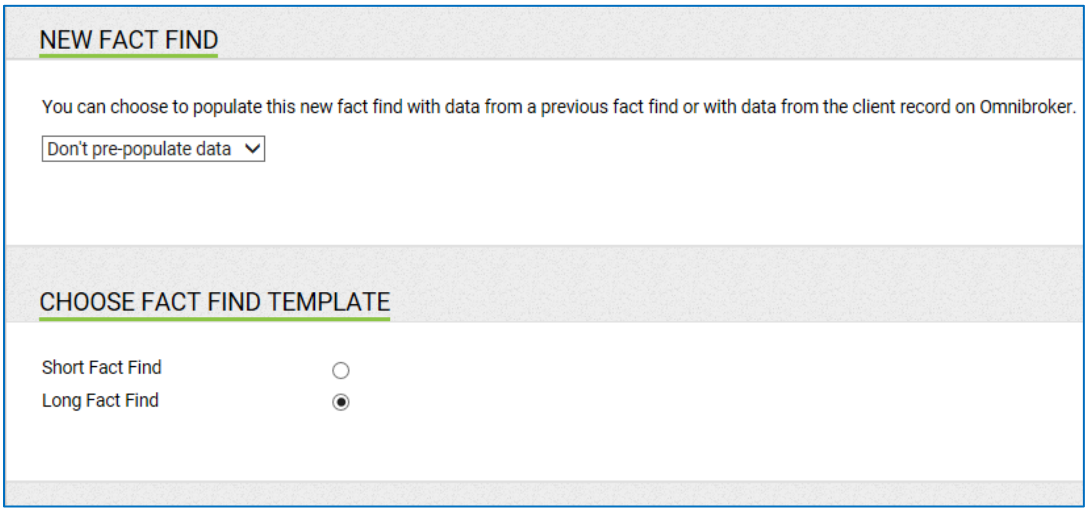
Each fact find can be created from scratch can be populated using data from the client record or can be created using data from a previous fact find.

From within a client's profile, click on "**Fact Find and Needs Analysis**" in the actions box

A page will then be displayed listing recent fact finds that have been created for the client.



Simply click on one of the existing fact finds or click on "**Add Fact Find**" to create new fact find.



The “**Short Fact Find”** accounts for basic client finances.

The” **Long Fact Find”** goes into more detail.

Both the short and long fact finds can be produced in a professional PDF document and presented to a client to be completed.

Below is an example of how the PDF document will appear.

Demo Broker

Demo Insurances Ltd

Document prepared by David O'Connor, created on 08/05/2018

Personal Details

	Self	Partner
Name		
Address		
Home Telephone		
Mobile		
Email		
Marital Status		
Date of Birth		
Sex		
Smoker		
Health		
PPS Number		

Dependents

Name	Date of Birth	Relationship

Employment Details

	Self	Partner
Occupation		
Type		
Employer (if applicable)		

Personal / Employment Notes

Printing a Blank Copy of a Fact Find

You can print a blank copy of both fact finds.

For both short and long fact finds simply leave all sections empty and click "**Print as PDF**".

Creating a Needs Analysis Report

You can create a needs analysis report for a client reviewing the areas of life protection and pension provision.

The areas available for review are

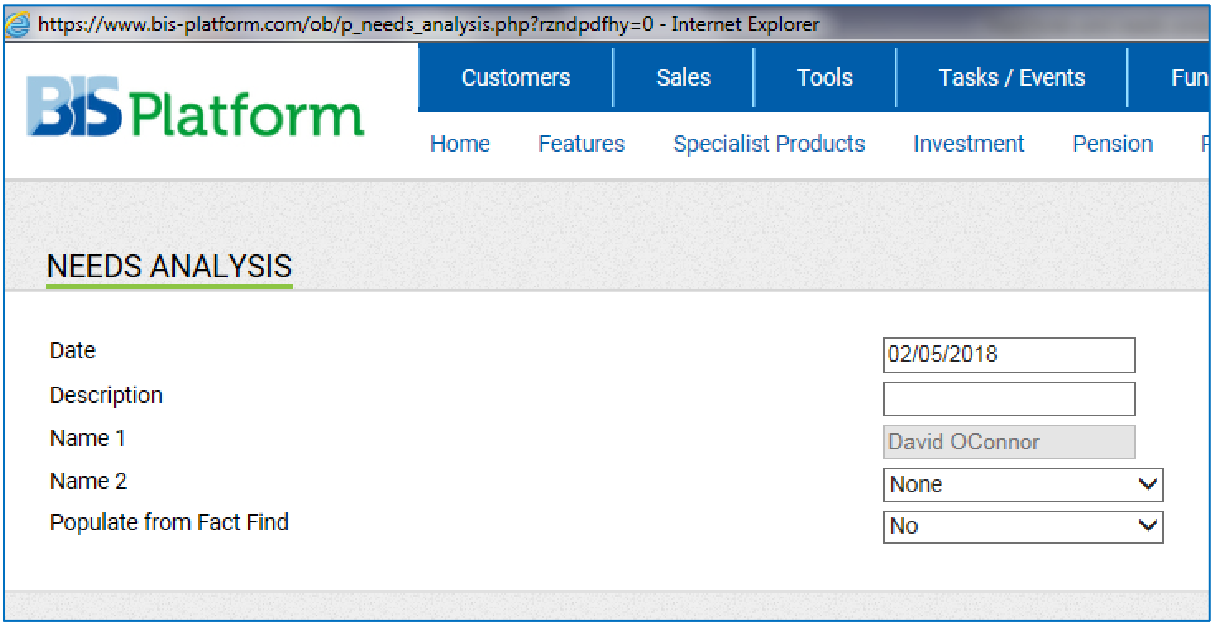
- Income/expenditure
- Personal balance sheet
- Life cover
- Income protection cover
- Pension cover

In each case simple calculations are provided to help evaluate a client's currents situation.

If a short fall is identified within any area reviewed, then a quotation for the cost of the shortfall amount can easily be generated.

From within the client's profile, click on "**Fact Find and Needs Analysis**".

Then you have a choice to view a needs analysis report already created or alternatively you can create a new report by clicking "New Needs Analysis".



At the start of a needs analysis report you will be asked to select the clients to be reviewed.

You will also be given the option to populate the report with details obtained from a previous fact find.

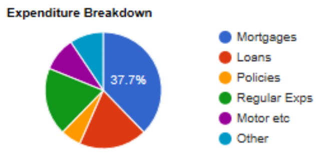
You can then choose the areas you would like to analyse by simply ticking the appropriate boxes and clicking “**Next Page**”.

You will be asked to confirm client details such as name, DOB gender and smoker status. Once all details have been confirmed then click “**Next Page**”.

The next section will require you to complete a monthly income and expenditure analysis in which you will be asked to enter details such as total monthly income, total monthly expenses etc. (This will be filled in automatically if you choose to populate from a previous fact find)

MONTHLY INCOME & EXPENDITURE ANAYLSIS

Gross Annual Salary	200000
Net Monthly Income (from salary)	10000
Other Net Monthly Income	0
Total Net Monthly Income	
Mortgage Repayments	2000
Other Loan Repayment	1000
Life/Savings/Pension Policies	300
Regular Expenses (eg.rent,food,household bills)	1000
Motor/ Travel/ Holidays	500
Other Expenses	500
Total Monthly Expenses	**5300**



The next section will be an “**Assets vs Liabilities balance sheet**”.

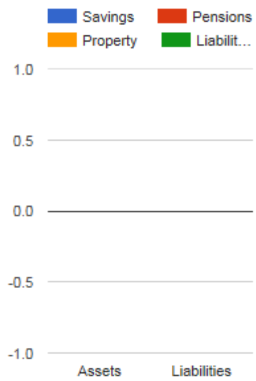
ASSETS VS LIABILITIES - BALANCE SHEET

Property Assets (show more lines)

Pensions (show more lines)

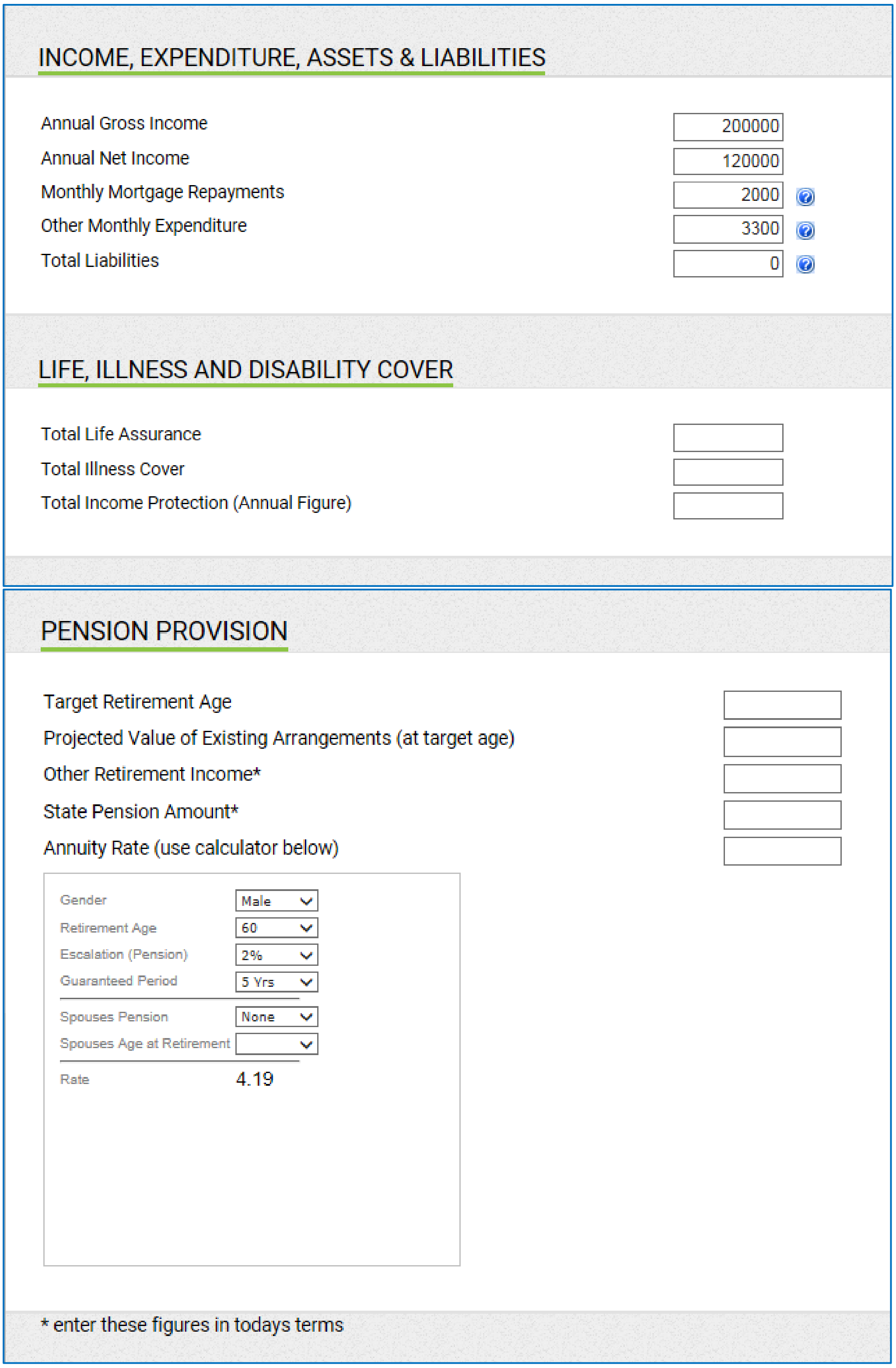
Investments / Savings / Other (show more lines)

Liabilities (show more lines)



After completing this “**Click Next Page**”

This will show you income, expenditure, assets & liabilities and require you to complete "**Life Income and Disability Cover**" and to calculate "**Pension Provision**".



INCOME, EXPENDITURE, ASSETS & LIABILITIES

Annual Gross Income	200000
Annual Net Income	120000
Monthly Mortgage Repayments	2000
Other Monthly Expenditure	3300
Total Liabilities	0

LIFE, ILLNESS AND DISABILITY COVER

Total Life Assurance	
Total Illness Cover	
Total Income Protection (Annual Figure)	

PENSION PROVISION

Target Retirement Age	
Projected Value of Existing Arrangements (at target age)	
Other Retirement Income*	
State Pension Amount*	
Annuity Rate (use calculator below)	

Gender	Male
Retirement Age	60
Escalation (Pension)	2%
Guaranteed Period	5 Yrs
Spouses Pension	None
Spouses Age at Retirement	
Rate	4.19

* enter these figures in todays terms

Once all the details have been entered click "**Next Page**" to bring you to the Life cover recommendations page.

Life Cover

This page will analyse a client's profile and recommend a level of life cover that should be in place. The recommended level of life cover is calculated as a sufficient sum to clear all outstanding liabilities and to pay a multiple of net income for the client to the next of kin should a claim occur.

A shortfall will then be identified if the existing level of life cover does not meet the recommended level of life cover.

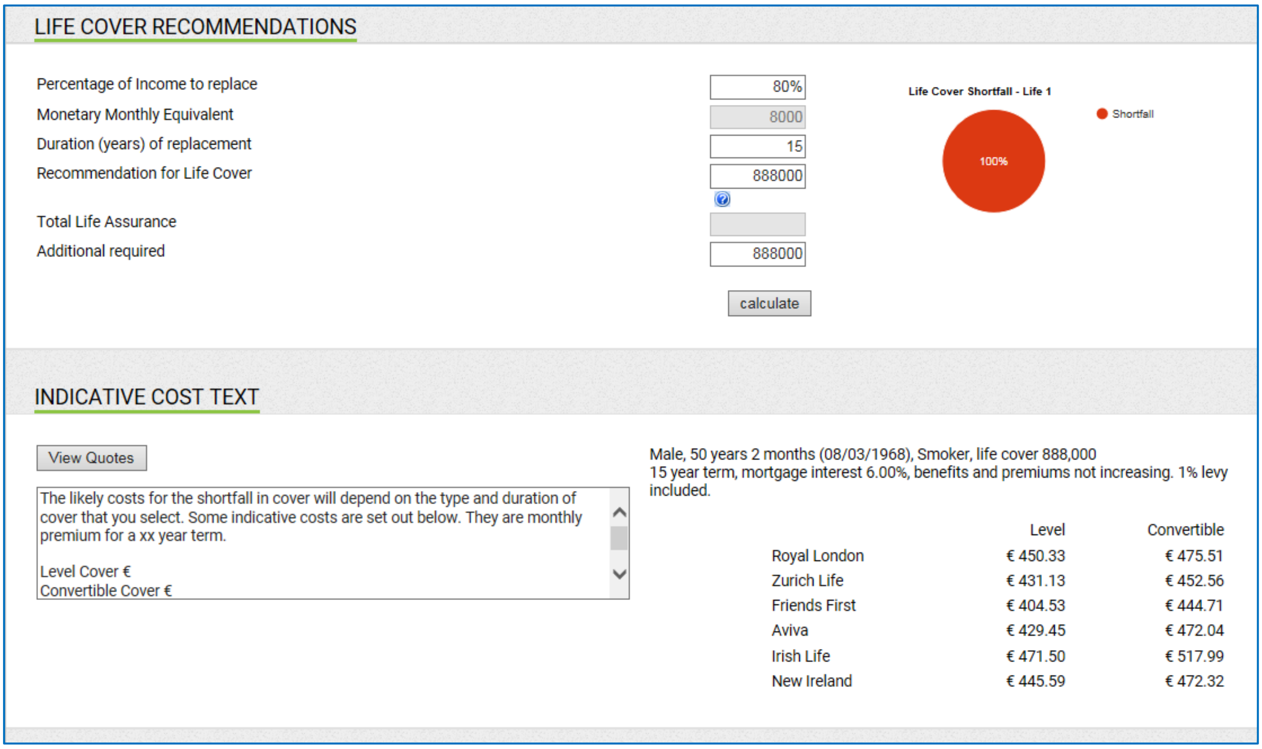
The term and percentage of income to replace will be decided by you the broker and if changes need to be made simply click calculate to update the calculations.

Once the shortfall amount has been confirmed click view quotes to get a costing for the additional

The client details, shortfall amount and term of cover will automatically populate into respective fields in the quotation engine.

The life cover option will also be automatically chosen.

Once the premium frequency and indexation options has been made click "**View Quotes**" to view the premium costs from each provider.



From the list of providers returned, choose the premiums for the level of additional cover required that you would like to include in the report.

You can then insert the premiums into the "**Indicative Cost Text**" section which will appear in the completed report.

This will clearly identify the cost of the additional amount of cover for the client.

Once all the details have been entered click "**Next Page**" to bring you to the illness cover recommendations page.

Illness Cover

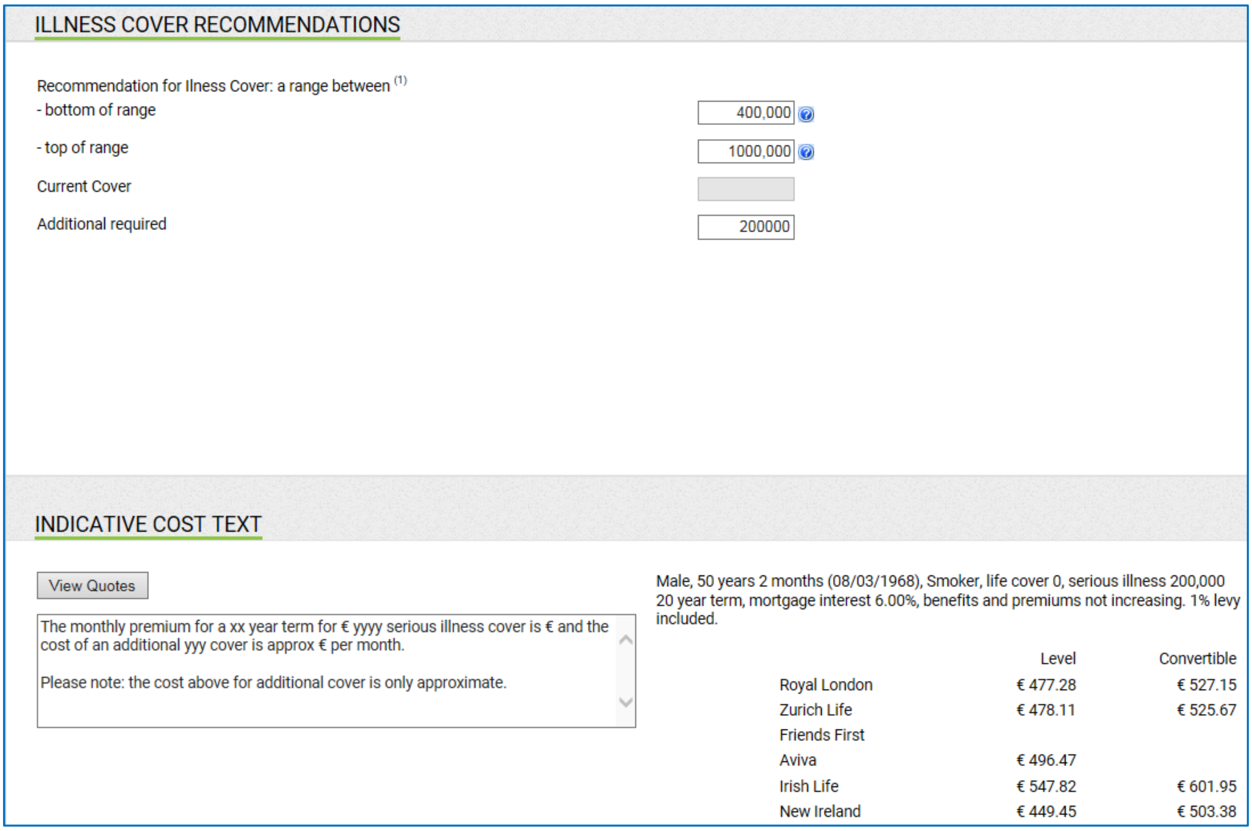
This section will analyse a client's profile related to serious illness cover and recommend a range of cover that should be in place.

It highlights a bottom of range illness cover being the minimum amount of cover in placed (2x gross annual salary) and a top of range serious illness cover being the ideal amount of cover in place (enough to clear all outstanding liabilities and leave all sufficient funds to cater for medical expenses).

Depending on the existing serious illness cover in place you can make a recommendation on the additional amount of cover required.

The client details, shortfall amount and term of cover will automatically populate into the respective fields in the quotation engine.

Once the premium frequent and indexation options has been made click "**View Quotes**" to view the premium costs from each provider.



From the list of providers returned, choose the premium for the level of additional cover required that you would like to include in the report.

You can insert the premiums into the "**Indicative Cost Text**" section will appearing the report when completes.

This will clearly identify the cost of the additional amount of cover for the client.

Once all the details have been entered click "**Next Page**" to bring you to the income protection recommendations page.

Income Protection Recommendation

This section will analyse a client's profile related to income protection cover and recommend if a shortfall it exists.

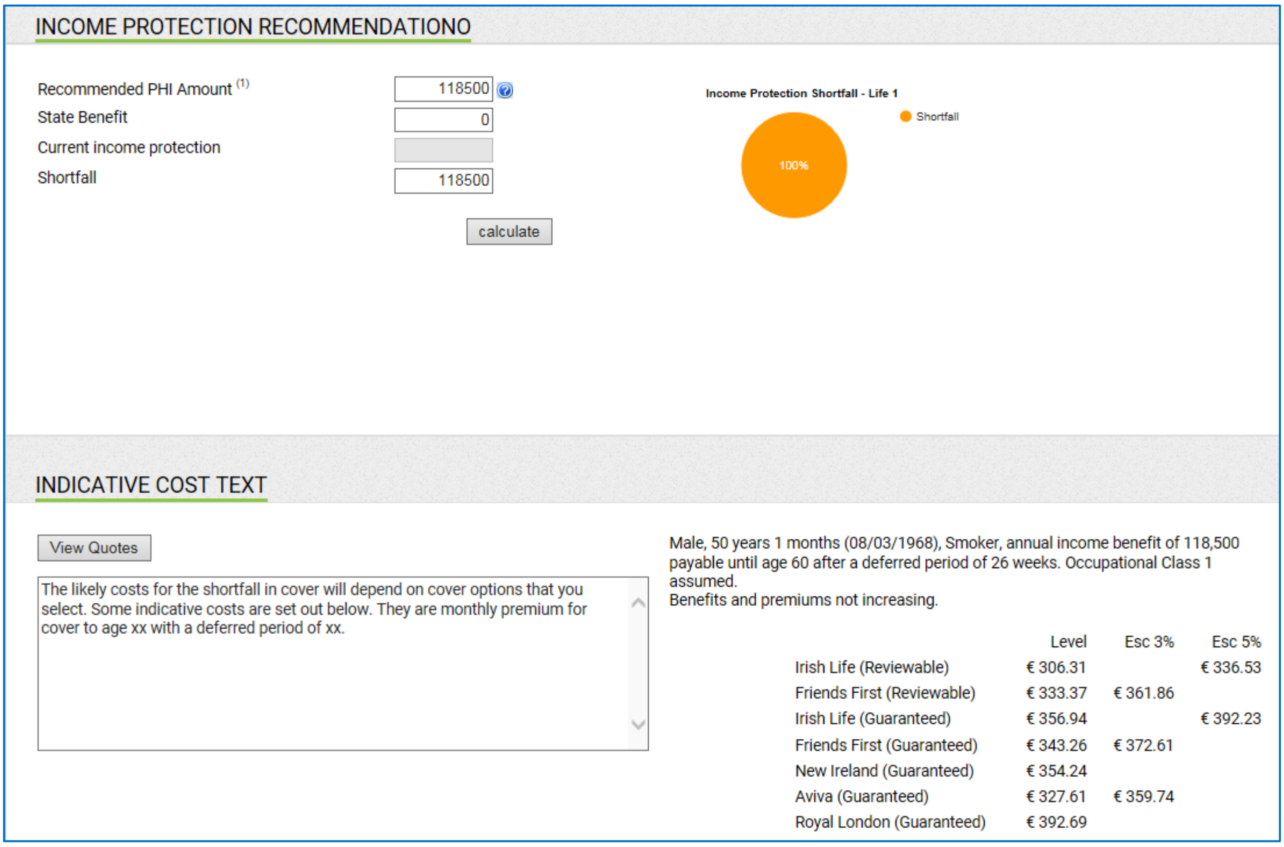
75% of the existing salary will be displayed as the recommended PHI cover that should be in place.

If annual salary is greater than €125,000 then 75% of the first €125,000 (=€93,750) plus 33% of the remainder of the gross salary is recommended.

The state benefit and existing PHI cover (if any) will be subtracted from the recommended level of cover to easily identify any shortfall that might exist.

However, if 75% of the existing salary is too high based on your judgement, you can alter the recommended level of PHI cover and click calculate to alter the shortfall amount.

Once the shortfall amount has been agreed, click "**Calculate**" to get a cost for the level of additional cover.



The client details and shortfall amount will automatically populate into the respective fields in the quotation engine.

Once the NRAQ, Occupational Class and Deferred options has been selected click "**View Quotes**" to view the premium costs from each provider.

From the list of providers returned, choose the premiums for the level of additional cover required that you would like to include the report.

You can then insert the premiums into the "**Indicative Cost Text**" section which will appear in the report when completed. This will clearly identify for the client, cost for the additional amount of cover.

Once all the details have been entered click "**Next Page**" to bring you to the pension provision recommendations page.

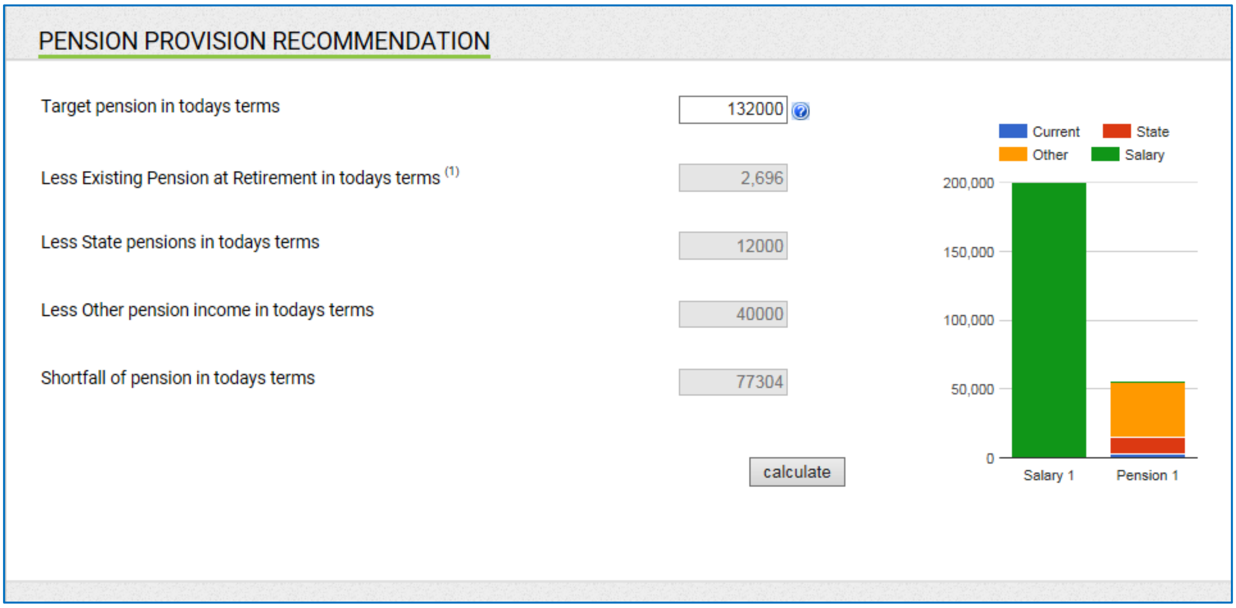
Pension Provisional Recommendation

This section will analyse a client's profile related to pension provision and will highlight a shortfall in their pension should it exist.

From the desired target pension required by a client, a shortfall of pension, state pension (if applicable) and other retirement income such as rental income etc. (in today's terms).

The target pension in today's terms by default is calculated 66% of
annual salary however you can amend this figure to an amount more suitable and affordable.

Once the target pension has been agreed upon, click "**Calculate**" to update the shortfall amount.



Then click "**View Quotes**" to get a costing for the shortfall amount.

Once assumptions such as net growth rate, premium escalation and inflation rate has been made then click "**Calculate**" to display the costing for this pension requirement.

Then click "**Next Page**" to continue.

The Needs Analysis Report will now be ready to be generated.

Click “**View Report**” to display the report in a word document as shown below.

SUMMARY

The purposes of this report is to help define some key financial goals and existing shortfalls and to put a plan in place to address the steps needed to meet your future needs in this regard.

The findings in the Report and the recommendations made are based on the information you have supplied through our Fact Finding process and also details we have obtained in regard to any financial products that currently exist.

The following is a summary of the key findings of the information you have supplied to us:

Basic Information	
Date Of Birth	08/03/1968
Gender	Male
Smoker Status	Yes
Annual Gross Income	€ 200,000
Annual Net Income	€ 120,000

Summary of Regular Income and Regular Expense	
Total Gross Monthly Income:	€ 200,000
Total Net Monthly Income:	0
Regular Monthly Expenses:	€ 5,300
Current Net Disposable Income:	€ 4,700

Summary of Net Worth	
Total Assets	0
Total Liabilities	0

You can then save the report to the client file or alternatively you can save the report locally to your PC.

Creating an Investment Review for a Client

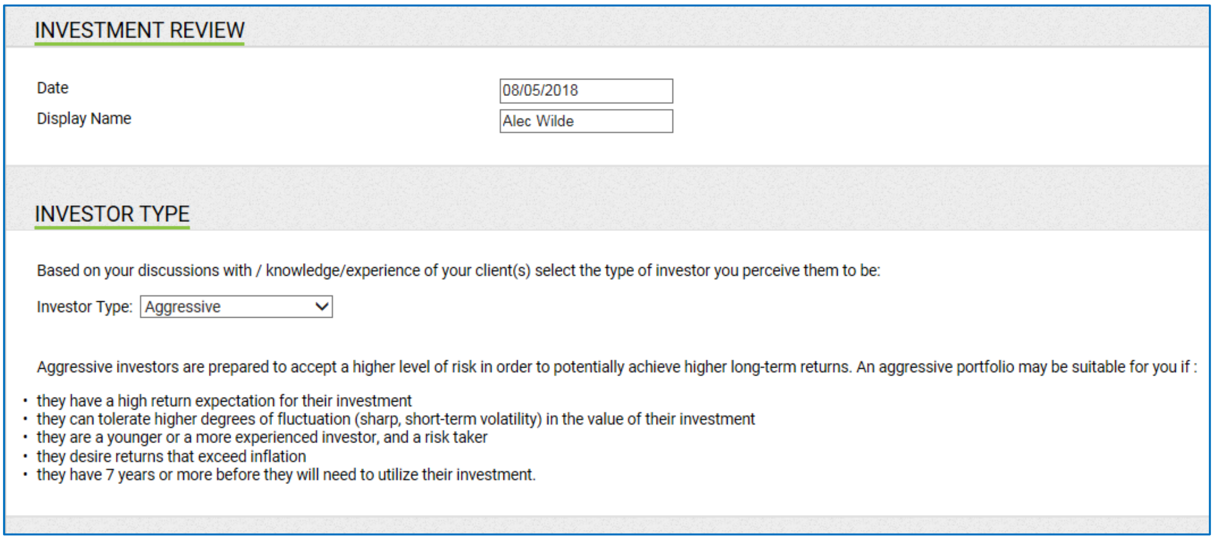
The investment review is a useful tool when recommending an investment product for a client.

It allows you to make investment recommendations in the form of a letter suited to the type of investor your client is.

From within a client's profile click on "**Fact Find & Needs Analysis**" in the action panel.

You then have then have the choice to view an "**Investment Review**" already created or alternatively you can create a new investment review report by clicking "New Investment Review" in the actions panel.

At the start of an investment review, you will be asked to select the type of investor you perceive your client to be.



After selecting an investor type click "**Next Page**" in the actions panel and continue on, as with the needs analysis report.

Once completed, the report will appear in a word document as shown below.

8 May 2018

Dear Alec,

Further to our recent discussions on a possible lump sum investment, I have set out below what I perceive to be a suitable portfolio / asset split for your investment portfolio. This is based on your answers to my questions on the Investment Questionnaire we completed.

The asset split suggested below could be described as Aggressive. I feel this best matches your investment need. The two most important factors in deciding what type of portfolio is suitable are

(1) your investment horizon – the period during which you plan not to touch the investment

(2) your attitude to risk and hence to loss, .i.e. whether you accept that the value of your investment may fall below that of the initial investment amount

SAMPLE AGGRESSIVE ASSET SPLIT

Asset Class	Minimum	Neutral	Maximum
Equity	65	80	95
Traditional Bonds	0	15	30
Money Market Instruments	0	0	5
Other	0	5	10

The other factors that are important in determining the suitability of various different asset classes are your dependence on the amount invested and the size of your total assets relative to the investment.

SUITABLE INVESTMENTS

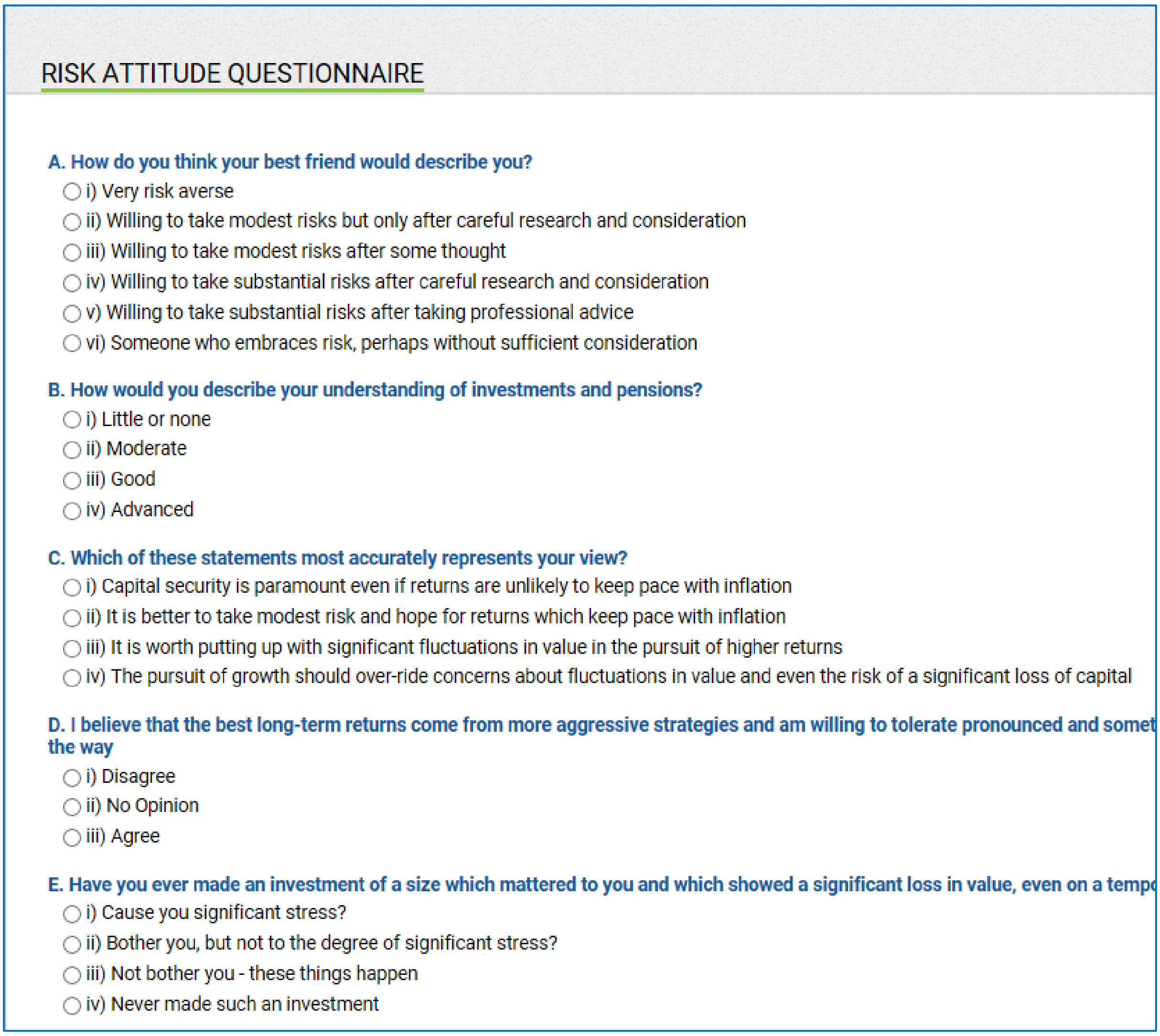
Given the profile described above, the type of investments products suitable would include Equity funds (international and sector-based), Index Tracking funds, Aggressively Managed fund or a mix of specialist funds to match the asset split as above. The advantage of the latter approach is that diversification across fund managers can also be achieved.My recommendation is that you ....In my experience wishes and

Risk Attitude Questionnaire

From the client profile click on "**Fact Find and Needs Analysis** " in the actions panel.

On the next page click "**Add Risk Attitude Questionnaire**"

This will bring you to a questionnaire to be filled out assessing the client's attitude to risk.


RISK ATTITUDE QUESTIONNAIRE

A. How do you think your best friend would describe you?

- i) Very risk averse
- ii) Willing to take modest risks but only after careful research and consideration
- iii) Willing to take modest risks after some thought
- iv) Willing to take substantial risks after careful research and consideration
- v) Willing to take substantial risks after taking professional advice
- vi) Someone who embraces risk, perhaps without sufficient consideration

B. How would you describe your understanding of investments and pensions?

- i) Little or none
- ii) Moderate
- iii) Good
- iv) Advanced

C. Which of these statements most accurately represents your view?

- i) Capital security is paramount even if returns are unlikely to keep pace with inflation
- ii) It is better to take modest risk and hope for returns which keep pace with inflation
- iii) It is worth putting up with significant fluctuations in value in the pursuit of higher returns
- iv) The pursuit of growth should over-ride concerns about fluctuations in value and even the risk of a significant loss of capital

D. I believe that the best long-term returns come from more aggressive strategies and am willing to tolerate pronounced and somet the way

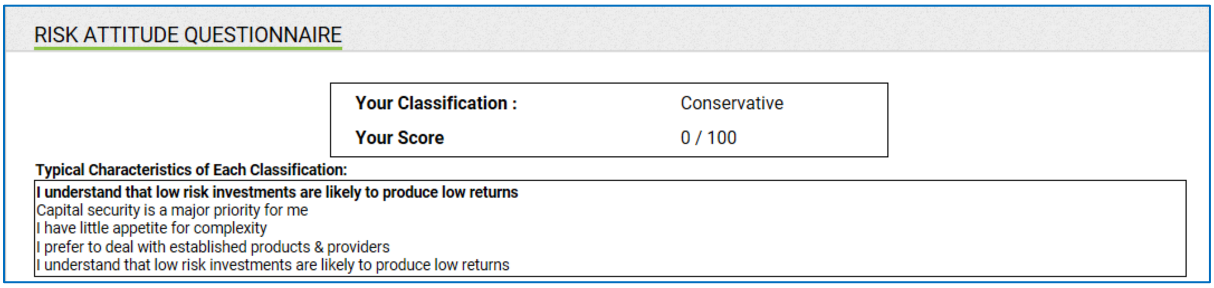
- i) Disagree
- ii) No Opinion
- iii) Agree

E. Have you ever made an investment of a size which mattered to you and which showed a significant loss in value, even on a tempo

- i) Cause you significant stress?
- ii) Bother you, but not to the degree of significant stress?
- iii) Not bother you - these things happen
- iv) Never made such an investment

Once you complete the questionnaire click "**Submit Questionnaire**" at the bottom of page.

This will calculate the results; provide a score of 0-100, and a classification of "**Growth**", "**Conservative**" etc.


RISK ATTITUDE QUESTIONNAIRE

Your Classification :	Conservative
Your Score	0 / 100

Typical Characteristics of Each Classification:

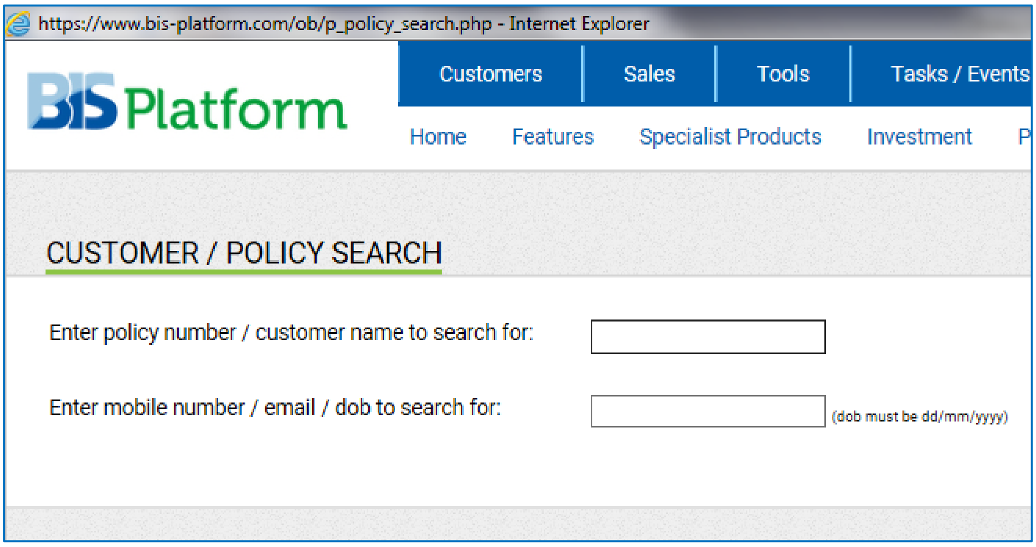
I understand that low risk investments are likely to produce low returns
Capital security is a major priority for me
I have little appetite for complexity
I prefer to deal with established products & providers
I understand that low risk investments are likely to produce low returns

You can then save the results to the client by clicking "**Save to Client**" in the actions panel or create a report by clicking "**Generate Report**" in the actions panel.

Policy Management

Searching for a Policy

Hover the curser the “**Customers**” tab and click “**Search**”, or select “**Quick Search**” in the middle of the homepage screen.

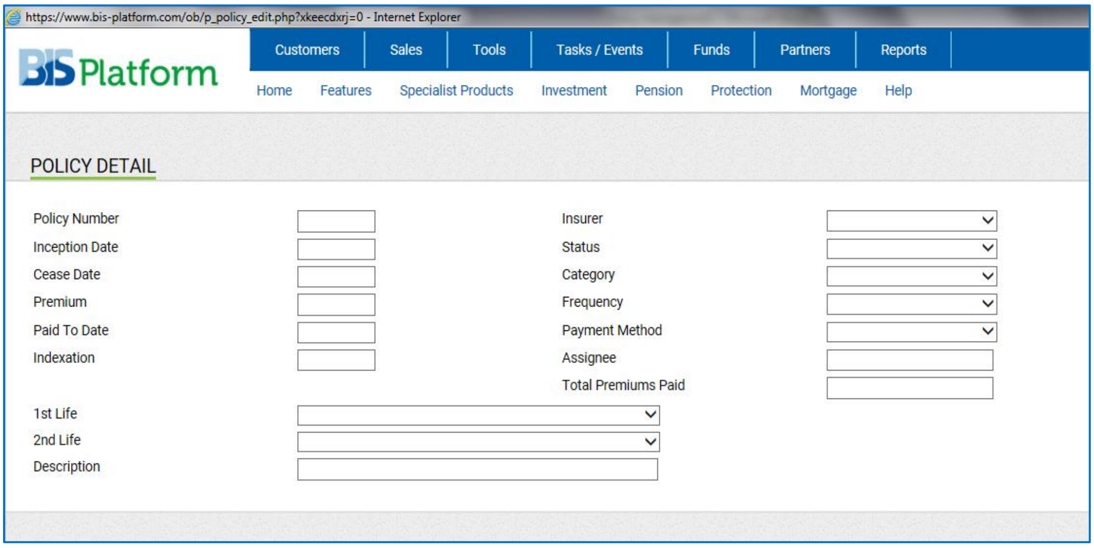


Simply enter the policy number and press enter and the respective policy will then be displayed.

Adding a Policy

From within a client profile click “**Add New Policy**” in the Actions panel.

On the next page the relevant fields for adding a new policy will be displayed.

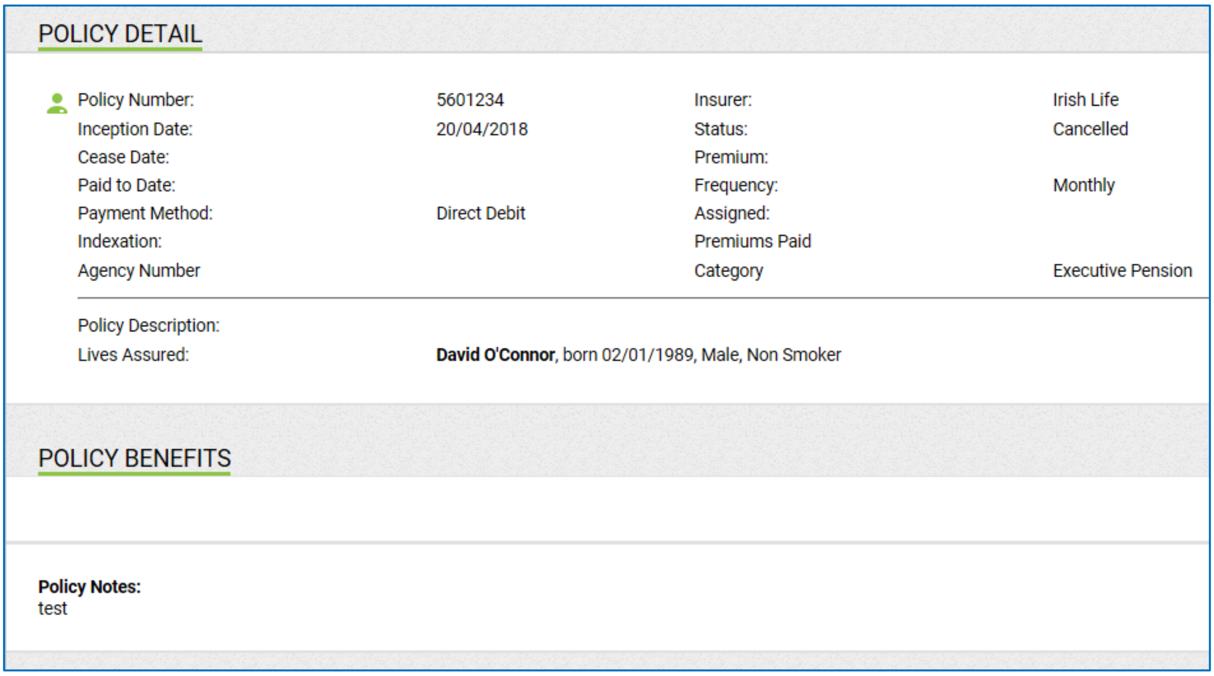


Once the details are saved the new policy will appear in the client’s profile and can then be included in any future policy reports created.

Viewing a Policy in Detail

From within a client profile, simply click on the respective policy you wish to view and all details will be displayed.

These include Policy Details along with Fund & Policy Values.



POLICY DETAIL

Policy Number:	5601234	Insurer:	Irish Life
Inception Date:	20/04/2018	Status:	Cancelled
Cease Date:		Premium:	
Paid to Date:		Frequency:	Monthly
Payment Method:	Direct Debit	Assigned:	
Indexation:		Premiums Paid	
Agency Number		Category	Executive Pension

Policy Description:	
Lives Assured:	**David O'Connor**, born 02/01/1989, Male, Non Smoker

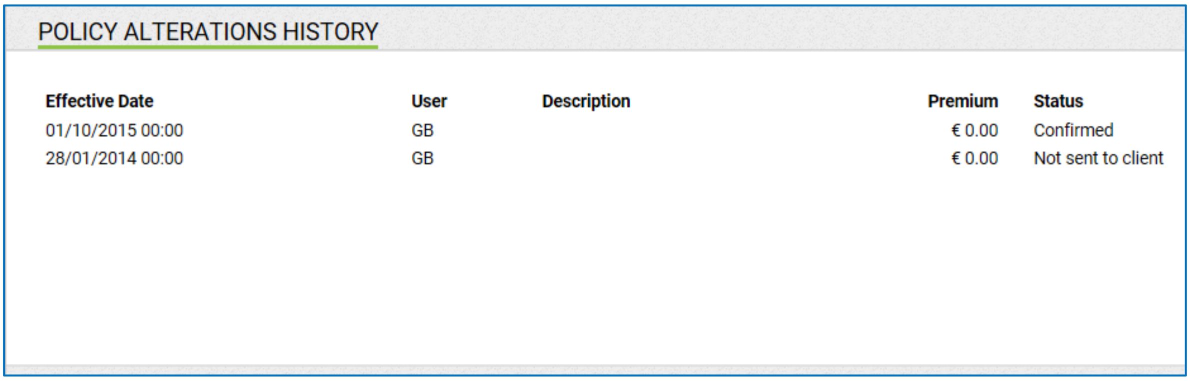
POLICY BENEFITS

Policy Notes:
test

Viewing Policy History

After selecting a policy to view you will see "**Policy History**" in the actions panel.

Click this link and you can view the history of the policy, which is recorded from the first update to BIS Platform.



POLICY ALTERATIONS HISTORY

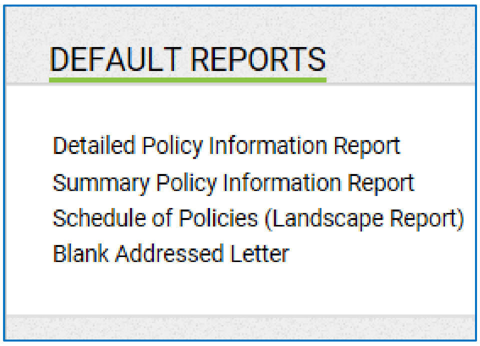
Effective Date	User	Description	Premium	Status
01/10/2015 00:00	GB		€ 0.00	Confirmed
28/01/2014 00:00	GB		€ 0.00	Not sent to client

Leaving Policy Notes

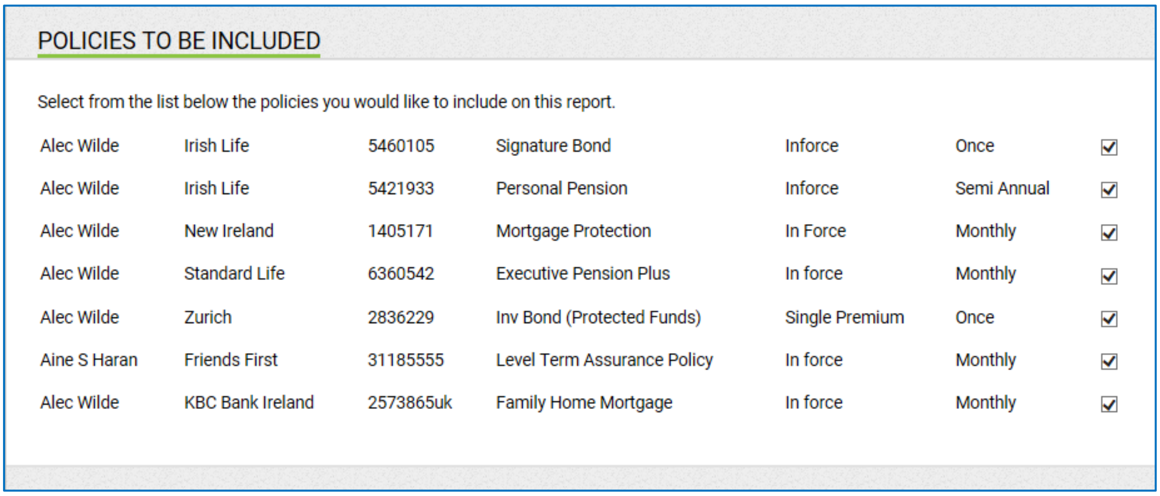
From within a client’s profile click “**Create Report**” situated in the Actions panel.

On this page you will have several different styles of reports to choose from including “**Detailed Policy**” and “**Summary Policy**” information report.

The “**Detailed**” report gives a one-page account of each policy chosen while the “**Summary**” report appears as a one-page document addressed to the client with a brief account of each policy selected.



Once you have decided on the style of the report; you then choose which policies to include in the document.


POLICIES TO BE INCLUDED

Select from the list below the policies you would like to include on this report.

Alec Wilde	Irish Life	5460105	Signature Bond	Inforce	Once	☑
Alec Wilde	Irish Life	5421933	Personal Pension	Inforce	Semi Annual	☑
Alec Wilde	New Ireland	1405171	Mortgage Protection	In Force	Monthly	☑
Alec Wilde	Standard Life	6360542	Executive Pension Plus	In force	Monthly	☑
Alec Wilde	Zurich	2836229	Inv Bond (Protected Funds)	Single Premium	Once	☑
Aine S Haran	Friends First	31185555	Level Term Assurance Policy	In force	Monthly	☑
Alec Wilde	KBC Bank Ireland	2573865uk	Family Home Mortgage	In force	Monthly	☑

Simply “**Tick the Box**” next to each policy you wish to include in the report and click “**Create Report**”

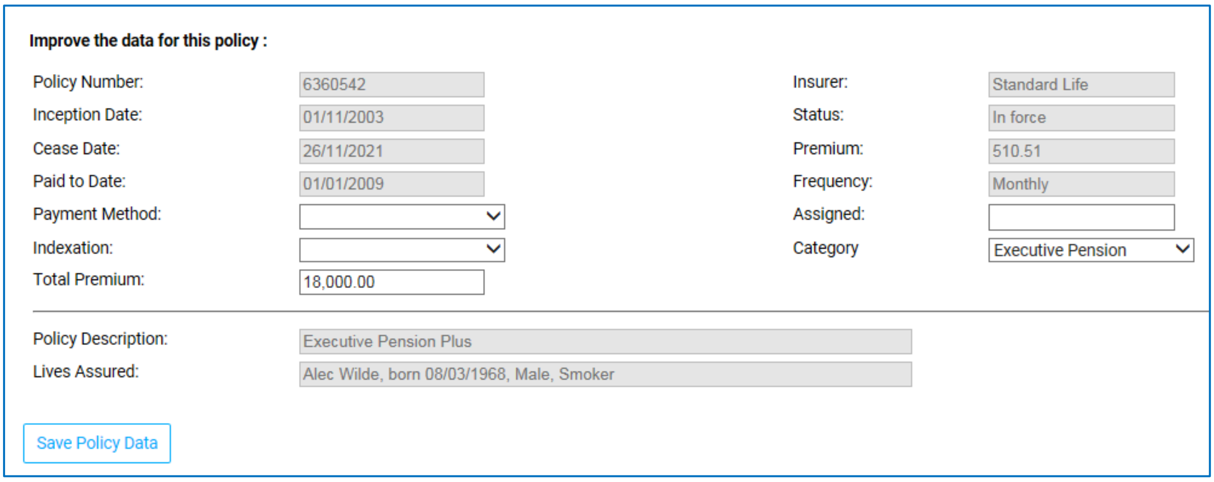
All the policy reports can be created in PDF and word format, allowing you to edit the document if required.

Improving Policy Data

If a policy comes in on the feed and the provider has sent in incomplete details, or you just want to add in extra data on a policy

From the client profile click on the policy that you want to change, then click "**Improve Policy Data**" in the actions panel.

This will show you all the policy details and any area where the data is incomplete.
Enter any data you wish to add and click "**Save Policy**" data at the bottom of the page.



Sales Management

Business Intelligence

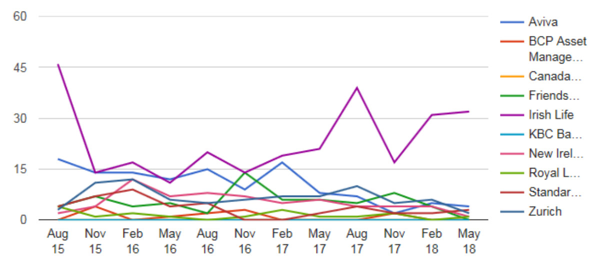
Hover the curser over the sales Tab and click “**Business Intelligence**”.

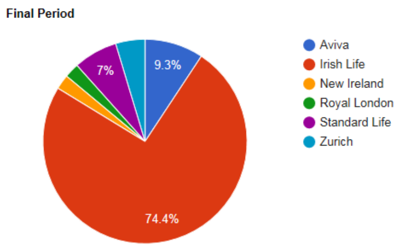
This will bring you to a page showing all the information and underlying data on the policies you have out on your clients.

BUSINESS INTELLIGENCE

Graph What	Policy Count - All
	New Business Only
Split By	Life Office
Handler	All Handlers

GRAPH





UNDERLYING DATA

	Aug 15	Nov 15	Feb 16	May 16	Aug 16	Nov 16	Feb 17	May 17	Aug 17	Nov 17	Feb 18	May 18
Aviva	18	14	14	12	15	9	17	8	7	2	5	4
BCP Asset Management		4		1	2	3				2		
Canada Life												
Friends First	4	7	4	5	2	14	6	6	5	8	4	
Irish Life	46	14	17	11	20	14	19	21	39	17	31	32
KBC Bank Ireland												
New Ireland	2	4	12	7	8	7	5	6	4	4	4	1
Royal London	4	1	2	1		1	3	1	1	2		1
Standard Life	4	7	9	4	5			2	4	2	2	3
Zurich	3	11	12	6	5	6	7	7	10	5	6	2

Sales Pipeline

Hover the curser over the sales Tab and click “**Sales Pipeline**”

This will bring you to a page showing you all your sales prospects.

SALES PIPELINE

There are 16 leads in your pipeline.

Total AP is **€0**

Total SP is **€0**

In the **last month** you have added €100 AP and €0 SP

In the **next month** you expect to close €0 AP and €0 SP

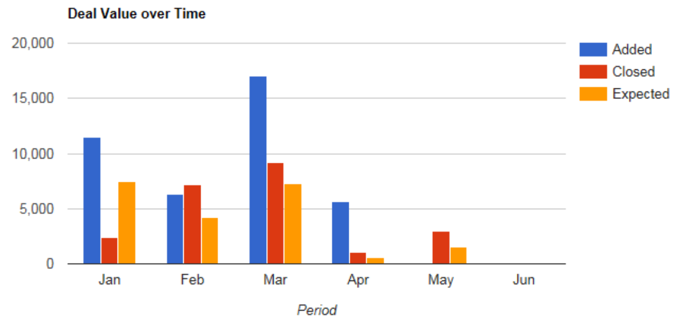
Conversion rate in the last three months has been 100%

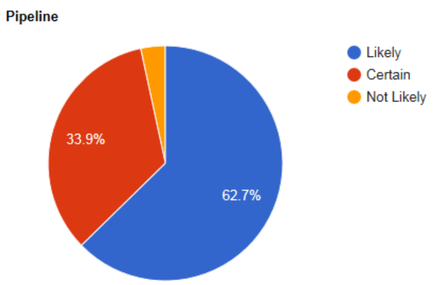
From: Jan-2018

To: Jun-2018

Graph Type: Deal Value

DEALS BY TIME | CERTAINTY





ACTIVE DEALS

02/01/2018	GB	Mortgage - KBC	Barry O'Keeffe	Underwriting Outstanding	Likely	3000
10/01/2018	GB	Life Assurance - NIA	Agatha Majella Woods	Questionnaire	Likely	500
18/01/2018	CD	protection	Adrian Monks	Initial Discussion	Likely	0
18/01/2018	CD	protection	Adrian Monks	Initial Discussion	Likely	0
26/01/2018	CD	Pension	Sinead Walters	Initial Discussion	Likely	0
26/01/2018	GB	Mortgage - KBC	Gareth Egan	Completed	Likely	3000
26/01/2018	CD	protection	Adrian Monks	Quotes forwarded to Client	Likely	1000
14/02/2018	CD	CRM & DOC MGT	Key Financials	Proposal Sent Out	Likely	102
23/02/2018	CD	CRM & DOC MGT	Oliver Murphy Insurance Brokers Ltd	Initial Discussion	Likely	63
23/02/2018	CD	Full Platform	Andrew Johnston Wealth Management Ltd	Initial Discussion	Likely	124
27/02/2018	CD	Term Quote	Ciara Byrne	Initial Discussion	Likely	1000
28/02/2018	CD	Term	Ciara Byrne	Initial Discussion	Certain	1000
28/02/2018	GB	Income Prot	Colm O'Flaherty	Proposal Sent Out	Likely	800

To add a deal, just click “**Add Deal**” in the action panel.

Enter in the all the details of the deal status and value then click “**Save Deal**” in the action panel.

This will save in your “**Sales Pipeline**” and also give you the option to save to the clients file.

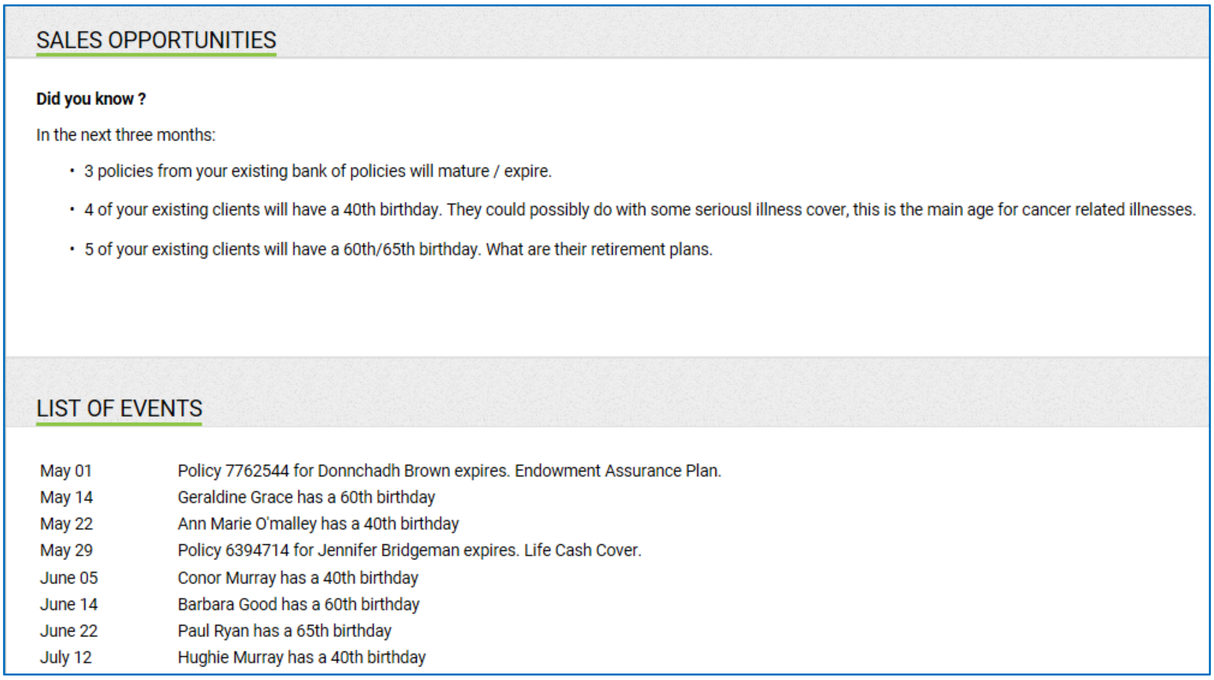
You also have the option to save the information in an excel file. In the actions panel you will see “**Export to Excel** (**Active/Closed**)”.

Clicking on either of these will automatically open the information in an excel spread sheet so it can be saved on your PC.

Sales Opportunity

Hover the curser over the sales Tab and click “**Sales Opportunities**”

This will bring you page showing you showing information on clients that may bring about an opportunity for a sale.



It will show if you have clients with significant birthdays coming up and it also shows policies that are about to mature or expire.

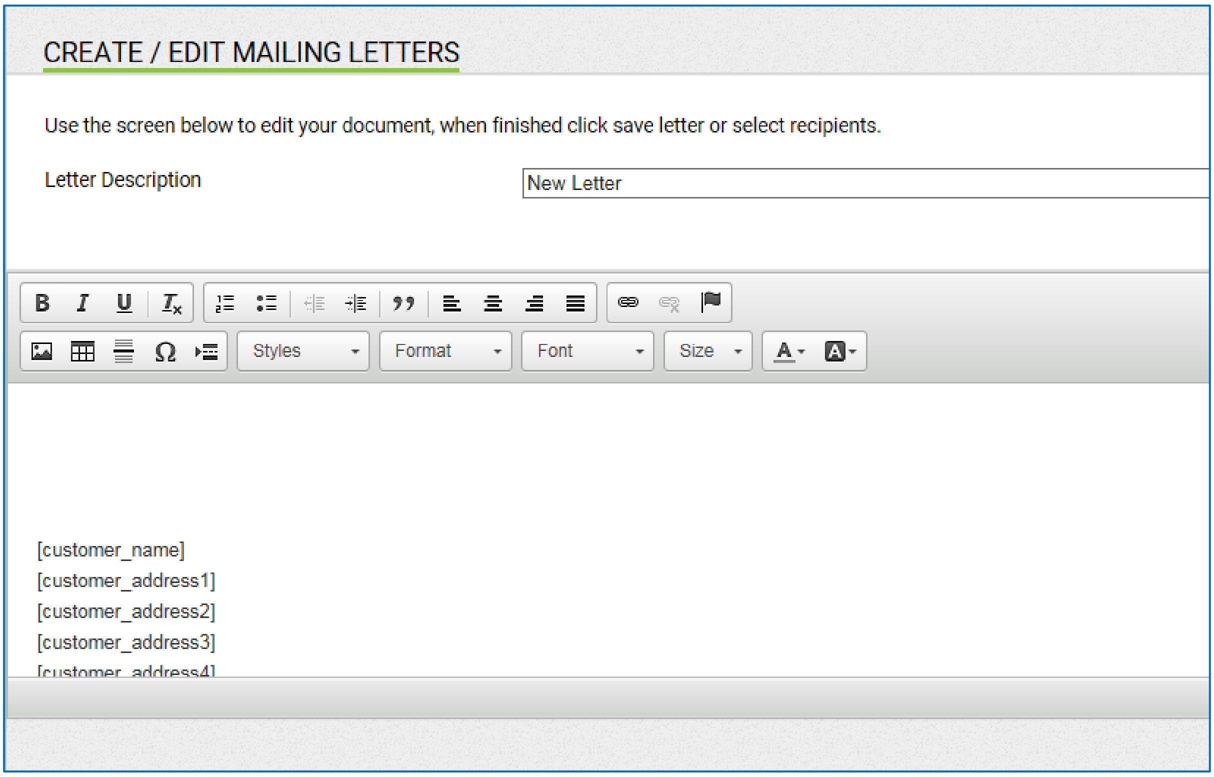
Mail Merging (Sending Group Letters for Marketing Purposes)

Hover the curser over the "**Sales**" Tab and click on "**Mail Merge**".

This will bring you to a page showing you previous letters you may have sent.

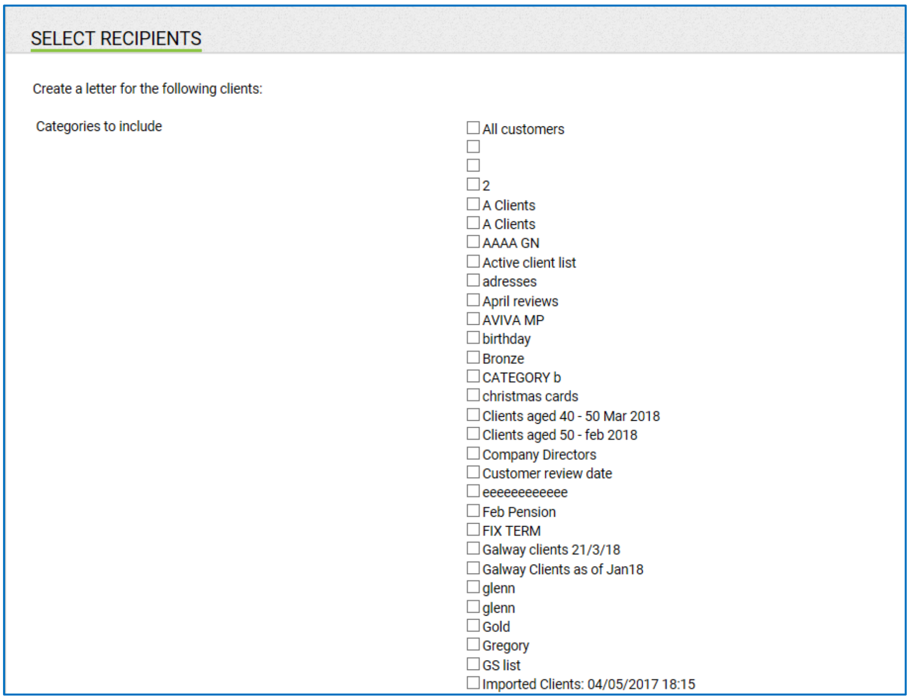
Click on the letter you wish to send or alternatively click on "**Create New Letter**" in the actions panel.

Clicking on "**Create New Letter**" will bring you to a page where you can design the letter you wish you send.



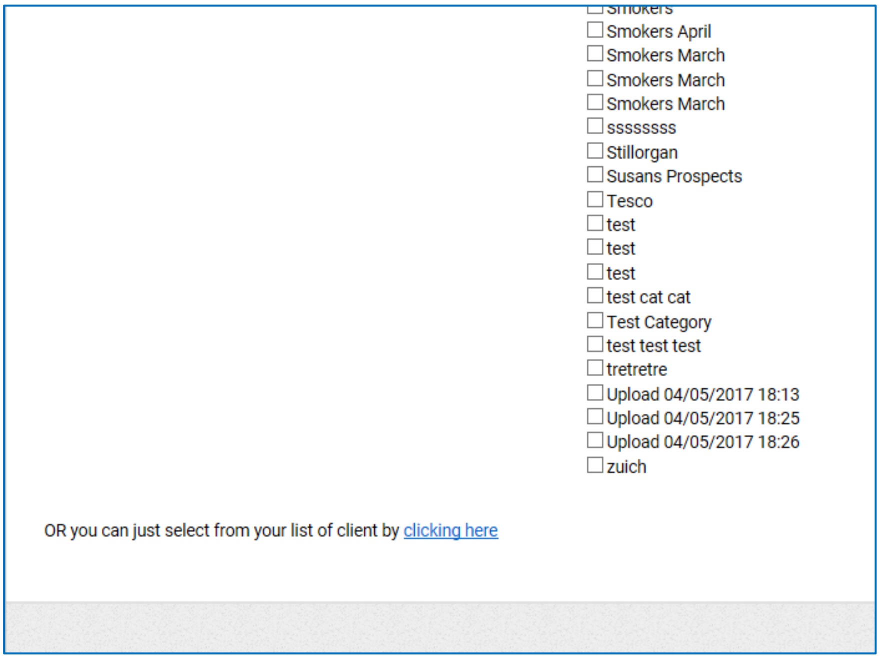
In the actions panel you will be given an option to "**Save Letter**" this will save the letter you have designed so it can be reused in the future.

To add recipients of your letter, click “**Select Recipients**” in the actions panel. This will show you a list of customer categories you can select to receive your letter.



Just tick the boxes next to the categories you wish to include and click “**Continue**” in the actions panel.

Alternatively, if you scroll to the bottom of the page, you will see an option to individually select people form your clients list.



Tick the box beside a client’s name to add them to the list, select as many clients as you wish and click “**Save**” in the actions panel. This will show you the list you have created and offer some additional marketing options.

If you are satisfied with the list of recipients click “**Generate Document**” in the actions panel. This will automatically open your letter in a word document.

Email Merging (Sending Group Emails for Marketing Purposes)

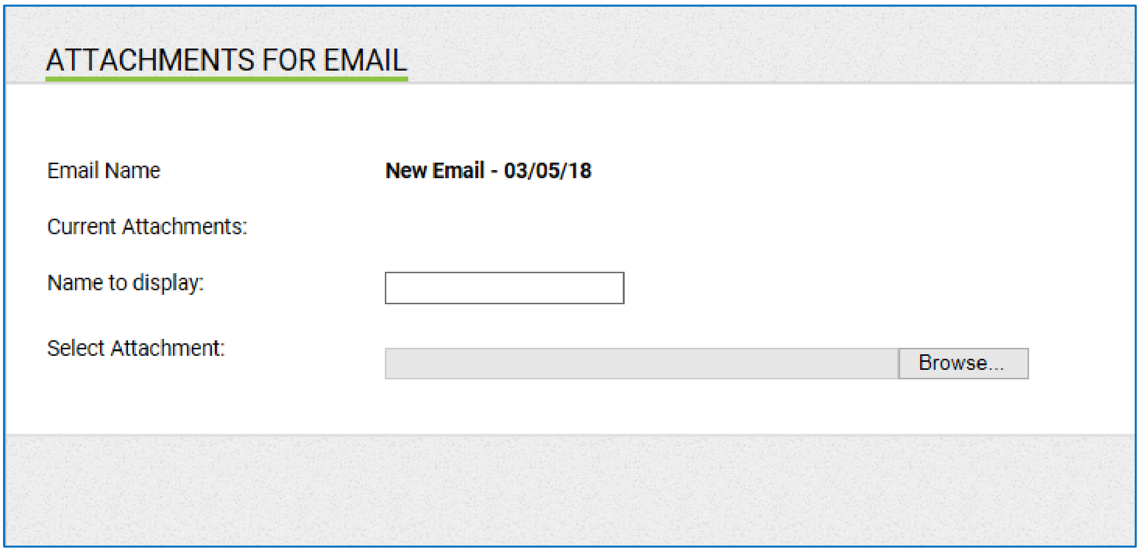
Hover the curser over the "**Sales**" tab and click on "**Email Merge**".

This will bring you to a page showing you previous emails you may have sent.

Click on the email you wish to send or alternatively click on "**Create New Letter**" in the actions panel.

Clicking on "**Create New Email**" will bring you to a page where you can design the email you wish you send.

In the actions panel you will be "**Attachments**", this will allow you to attach any files you wish to include in your email.



In the actions panel you will also be given an option to "**Save Email**" this will save the letter you have designed so it can be reused in the future.

To add recipients of your email click "**Select Recipients**" in the actions panel.

This will show you a list of customer categories you can select to receive your email.

Just tick the boxes next to the categories you wish to include and click "**Continue**" in the actions panel.

Alternatively, if you scroll to the bottom of the page, you will see an option to individually select people form your clients list.

Tick the box beside a client's name to add them to the list, select as many clients as you wish and click "**Save**" in the actions panel.

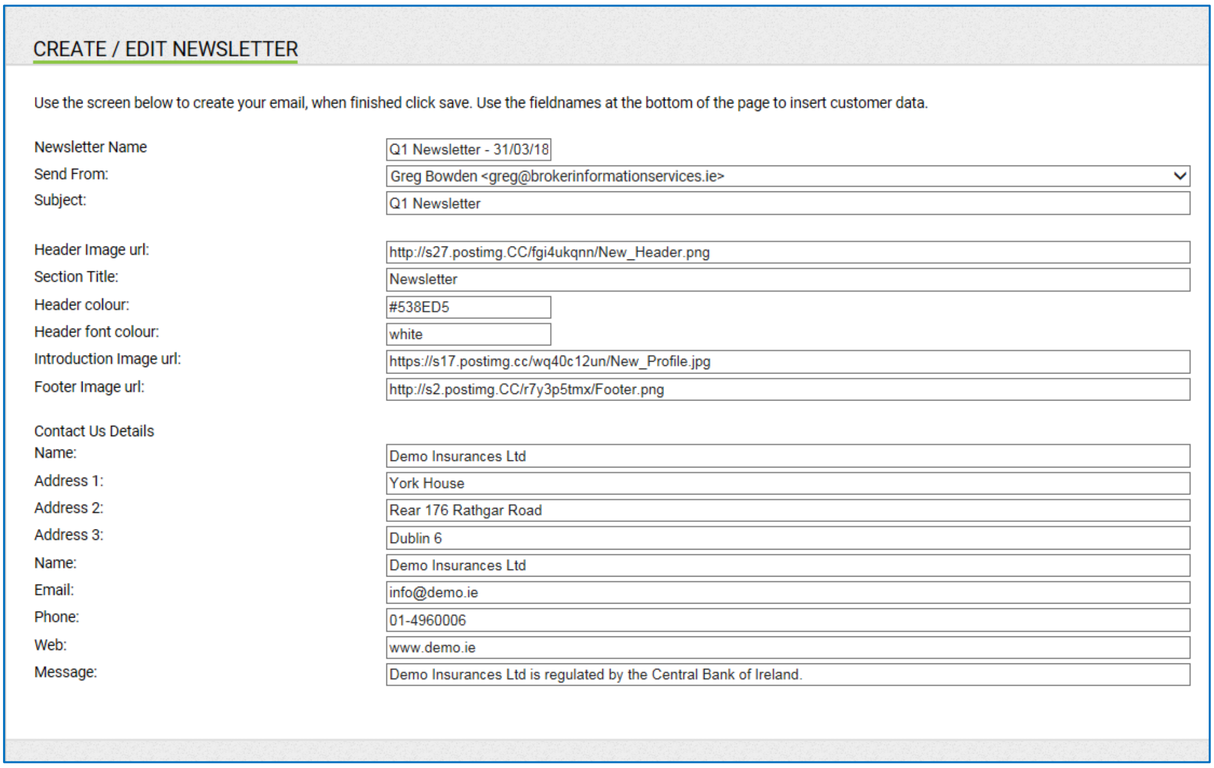
This will show you the list you have created and the email you have written.

If you are satisfied with the list of recipients click "**Send All Emails**" in the actions panel

Creating a Newsletter

Hover the curser over the "**Sales"** Tab and click on "**Newsletter**".

This will bring you to a page where you can create your own newsletter.


CREATE / EDIT NEWSLETTER

Use the screen below to create your email, when finished click save. Use the fieldnames at the bottom of the page to insert customer data.

Newsletter Name	Q1 Newsletter - 31/03/18
Send From:	Greg Bowden <greg@brokerinformationservices.ie>
Subject:	Q1 Newsletter
Header Image url:	http://s27.postimg.CC/fgi4ukqnn/New_Header.png
Section Title:	Newsletter
Header colour:	#538ED5
Header font colour:	white
Introduction Image url:	https://s17.postimg.cc/wq40c12un/New_Profile.jpg
Footer Image url:	http://s2.postimg.CC/r7y3p5tmx/Footer.png
Contact Us Details	
Name:	Demo Insurances Ltd
Address 1:	York House
Address 2:	Rear 176 Rathgar Road
Address 3:	Dublin 6
Name:	Demo Insurances Ltd
Email:	info@demo.ie
Phone:	01-4960006
Web:	www.demo.ie
Message:	Demo Insurances Ltd is regulated by the Central Bank of Ireland.

Once you have created your newsletter you can save it for future use by clicking "**Save Newsletter**" in the actions panel.

To select the clients, you want to receive the newsletter click "**Select Recipients**" in the actions box

This will show you a list of customer categories you can select to receive your newsletter.

Just tick the boxes next to the categories you wish to include and click "**Continue**" in the actions panel.

Alternatively, if you scroll to the bottom of the page, you will see an option to individually select people form your clients list or paste client emails in the box provided.

Tick the box beside a client's name to add them to the list, select as many clients as you wish and click "**Save**" in the actions panel.

This will show you the list you have created and the newsletter you have created.

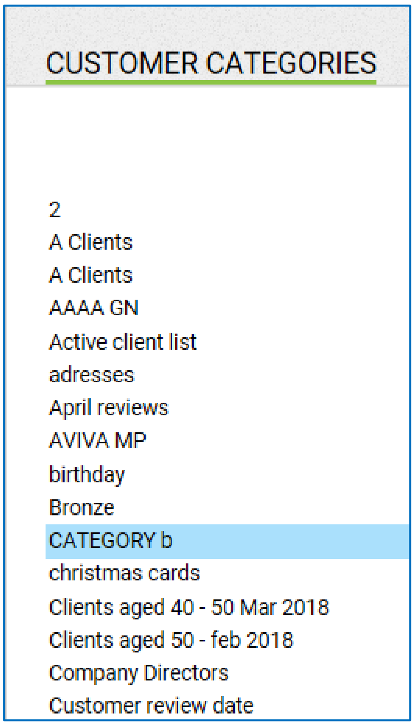
If you are satisfied with the list of recipients click "**Send All Emails**" in the actions panel.

Customer Categories

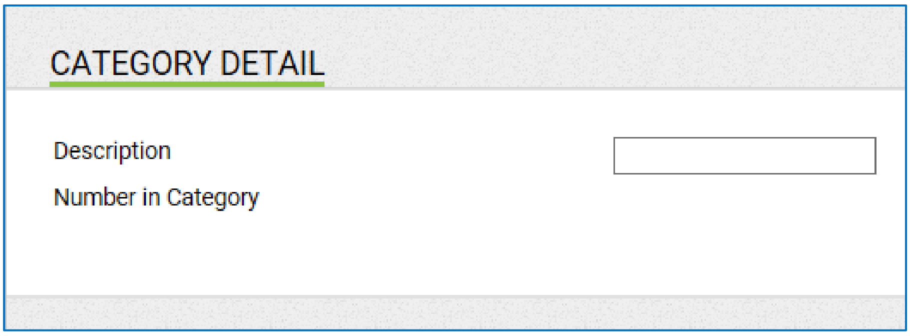
Hover the curser over the "**Sales"** tab and click on "**Customer Categories**".

This will bring you to a list of customer groups you have created.

Click on a customer category to see it in more detail, including a description and which customers are included in the category.



Alternatively, if you want to create a new category click "**Add New Category**" in the actions panel.



This will give you an option to name the category and then add any customer you wish to be included in it, to add or remove customers just click "**Add/Remove Customers**".

Select the customers you wish to add from your client list and click "**Save**".

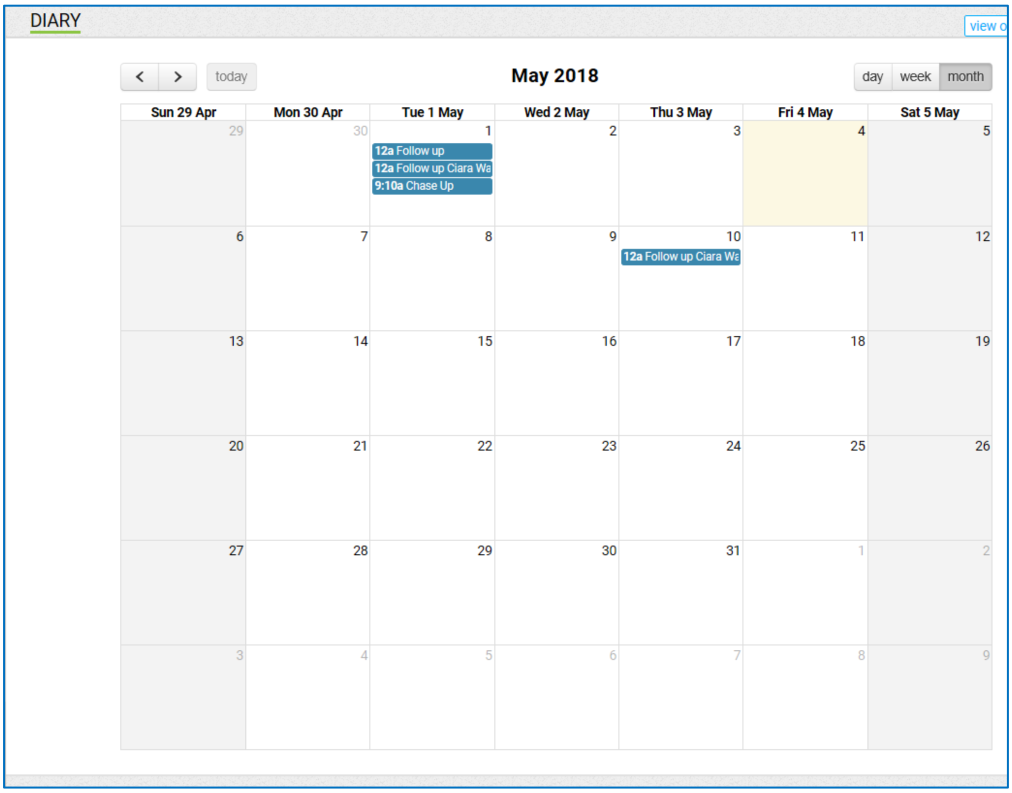
Then click "**Save Details**" in the actions panel to save the category to your list.

Schedule

Diary

Hover the curser over "**Tools**" and click "**Diary**".

This will bring you to a calendar showing your upcoming meetings or events.



To enter in a new appointment, simply click on the date you want to schedule the meeting or click "**Add Event**" in the actions panel.

Enter in the details such as time, customer and type of meeting, and then click "**Save**" in the actions panel.

From the diary you can select "**Print**" in the actions panel to print off your schedule a week at a time.

Complaints Log

Hover the curser over “**Tools**” and click on complaints.

This will show you a log of previous complaints.

Click on any complaint you wish to view.

COMPLAINT LOG

01/05/2018	David O'Connor	test	Open
30/04/2018	David O'Connor	gfdfg	Open
04/12/2017	Greg Bowden	Kasia Domaradzka	Closed
08/11/2017	Timothy Ahern	Mr. Wednesday	Open
11/09/2017	Timothy Ahern	Test Sept	Open
17/08/2017	Timothy Ahern		Open
15/08/2017	Timothy Ahern	Complainant A	Closed
03/08/2017	Timothy Ahern	Neymar	Open
14/07/2017	Timothy Ahern	Customer A	Closed
14/07/2017	Timothy Ahern	Anita	Open
06/07/2017	Timothy Ahern		Open
22/06/2017	Greg Bowden	Johnny Sexton	Closed
16/06/2017	Sinead Cooney	Ciara Dunne	Open
29/05/2017	Greg Bowden	Joe Bloggs	Closed
29/05/2017	Geoff Needham	Sinead Cooney	Open
26/05/2017	Greg Bowden	Sinead Cooney	Open
24/05/2017	Greg Bowden	Sinead Cooney	Open
24/05/2017	Ciara Dunne		Open
24/05/2017	Greg Bowden	Sinead Cooney	Open
23/05/2017	Frank Murray	Mary Cooney	Open
23/05/2017	Frank Murray	Sinead Cooney	Open
22/05/2017	Greg Bowden	Sinead Cooney	Open
22/05/2017	Greg Bowden	Sinead Cooney	Open
22/05/2017	Demo User	sinead cooney	Open
11/05/2017		Yves St Laurant	Open
24/04/2017	Murray Frank	sinead	Open
24/04/2017	Geoff Needham	Greg B	Open

To add a complaint, just click “**Create New Complaint**” in the actions panel.

Enter the details of the complaint and click “**Save New Complaint**”.

Frequently asked questions

What is the BIS Platform?

The BIS Platform is a web-based platform developed to provide brokers with product quotations and CRM platforms to help them to provide in-depth advice and on-going services to their clients.

It provides Financial brokers with live client and client policy details in one single client view.

OmniBroker is currently being delivered to over 1500 Financial Broker firms and its introduction has been the greatest technological innovation in the Financial Broker market for many years.

Carrying out thorough and accurate research of the market is an essential part of being a Financial Broker.

Best Advice and **AdviserPlus** have been the gold standard in this field for over 10 years, for ease of use, accuracy of information.

We enable Financial Brokers to compare life insurance, mortgage, investment, pensions and health insurance markets and to obtain customer specific quotations and research reports.

Each section is updated daily and quotations are returned accurately in seconds.

How do I reset my password?

You cannot reset your password from within the platform.

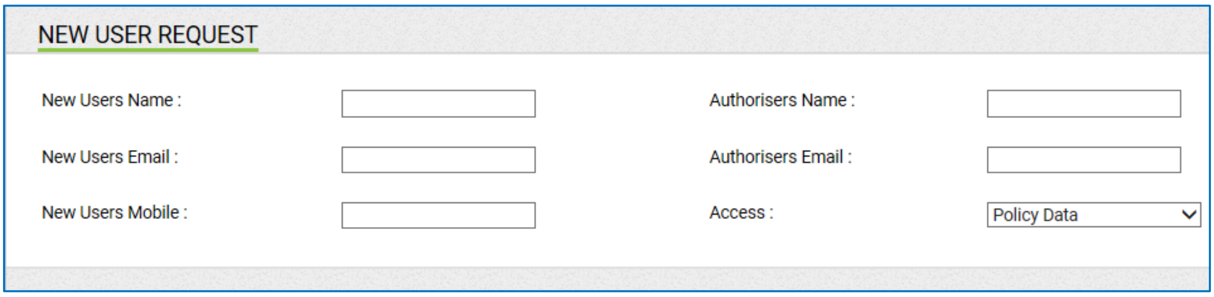
Passwords are confidential and sent by text message.

If you accidentally delete or misplace your password, you must phone Broker Information Services, (01 496 0006) so that a new password can be sent by text message to you.

How do I request new user?

At the home page hover the curser over the “**Features**” tab and click on “**Request user**”.

This will bring you to the page shown below.

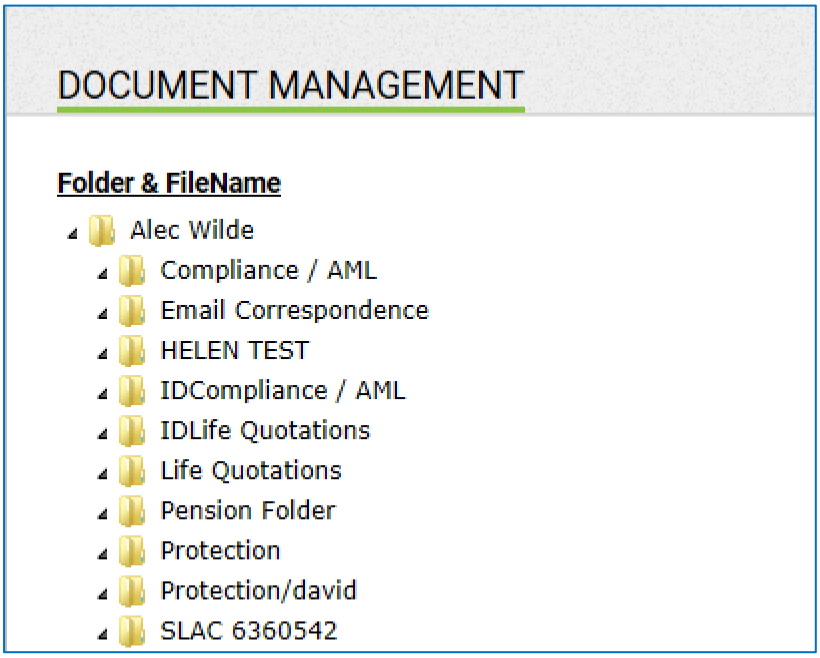


To request a new user, input the required details including an Authoriser i.e. Principle or Director who will receive a copy of the user request.

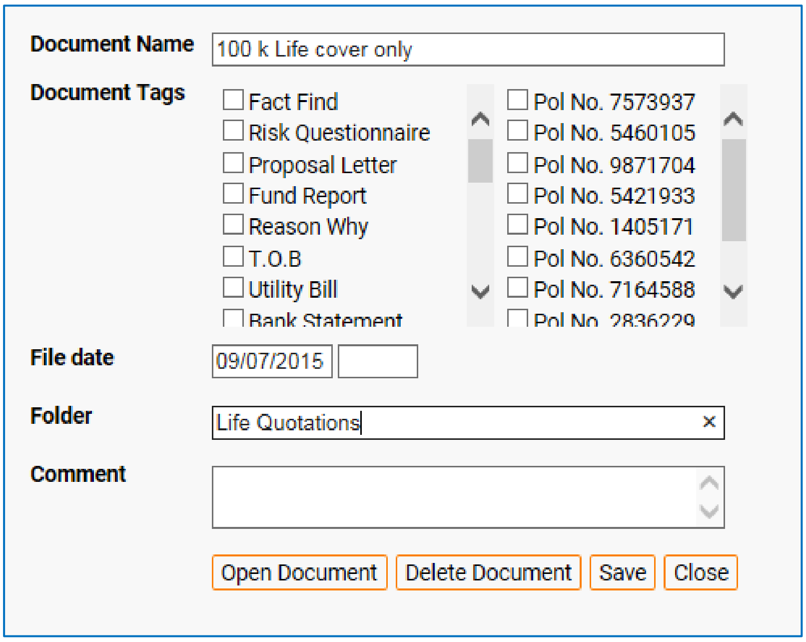
Upon receiving the user request and verifying account details, new login details will be sent by email to the user.

How do I create sub folder?

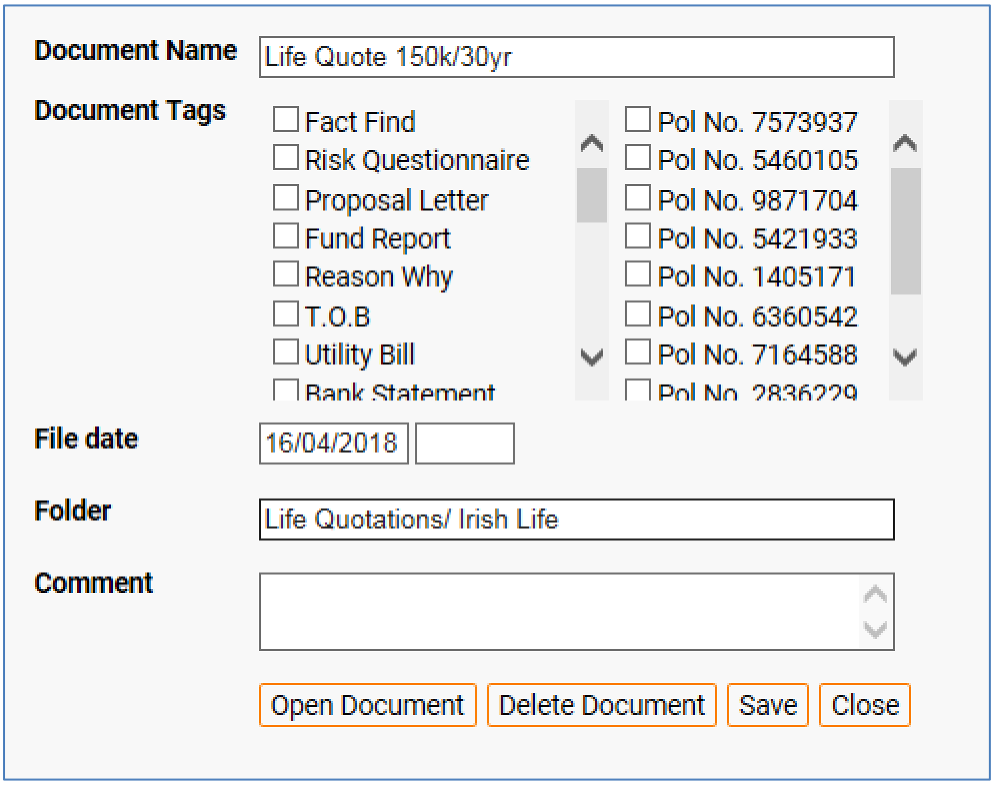
From a client profile scroll down to "**Documentation**" and click on "**View all**".



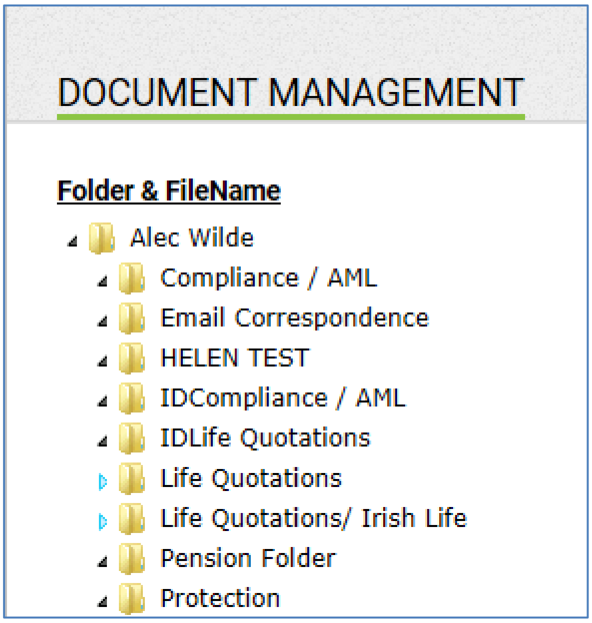
From here click on a folder and you will see window.



On put a forward slash (/) and the name of the subfolder and click “**Save**”.

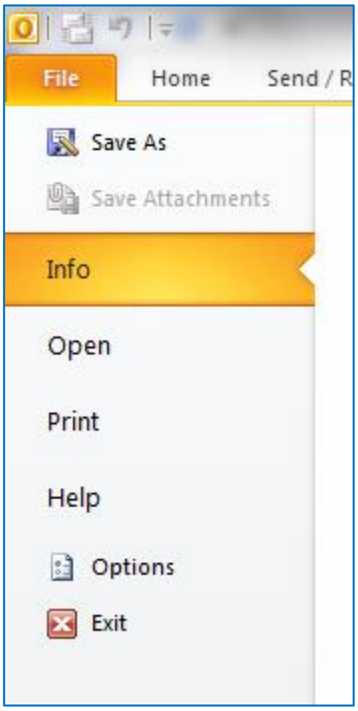


This will save the subfolder in documentation.

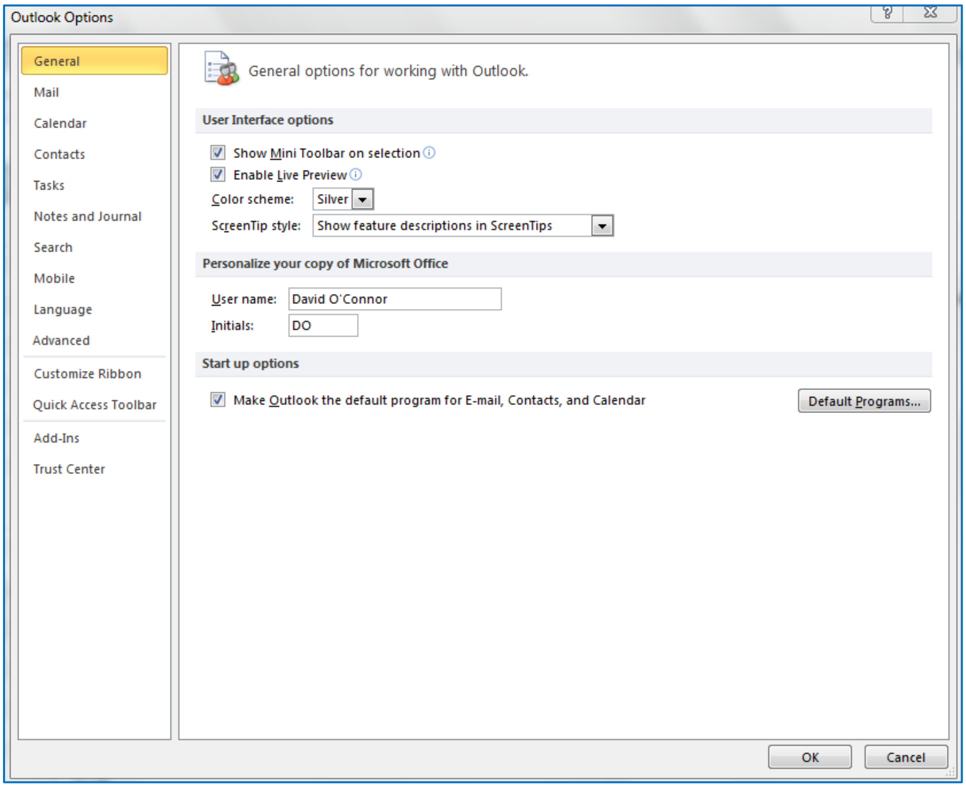


My add-in is disabled in outlook

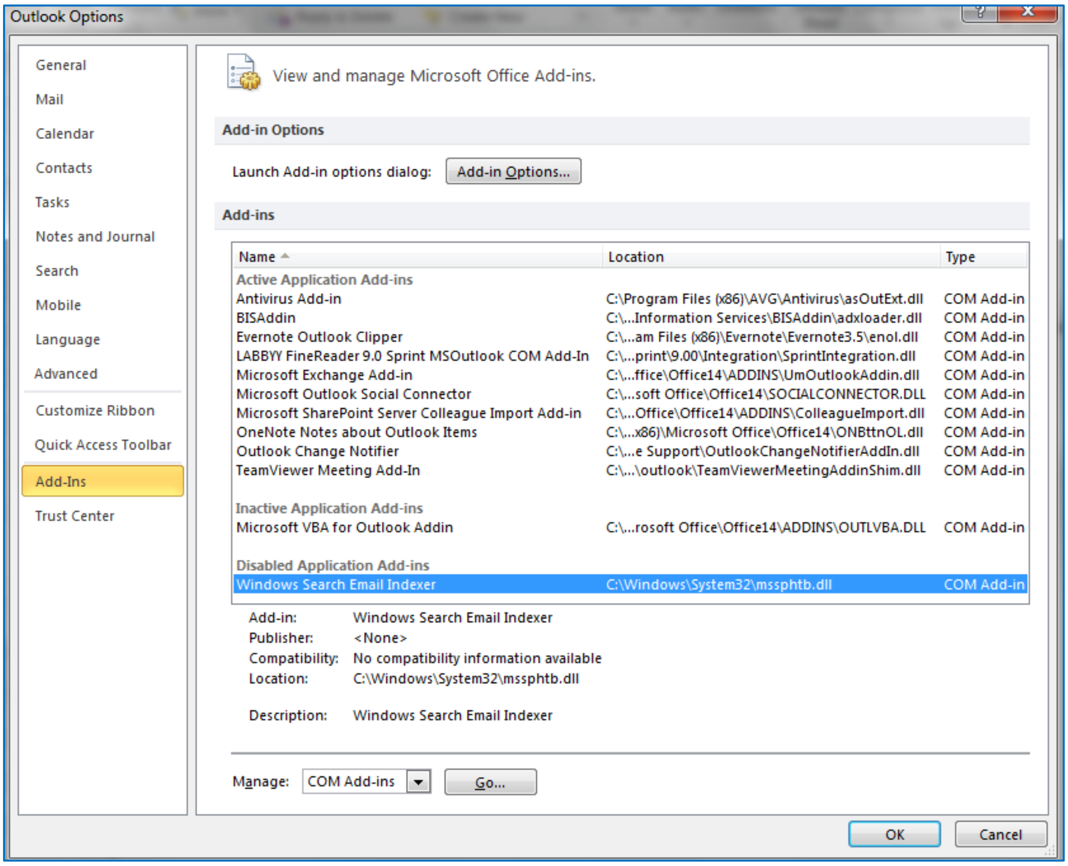
From within outlook, click “**File**” and then click “**Options**”.



This will open “**Outlook Options**” window.

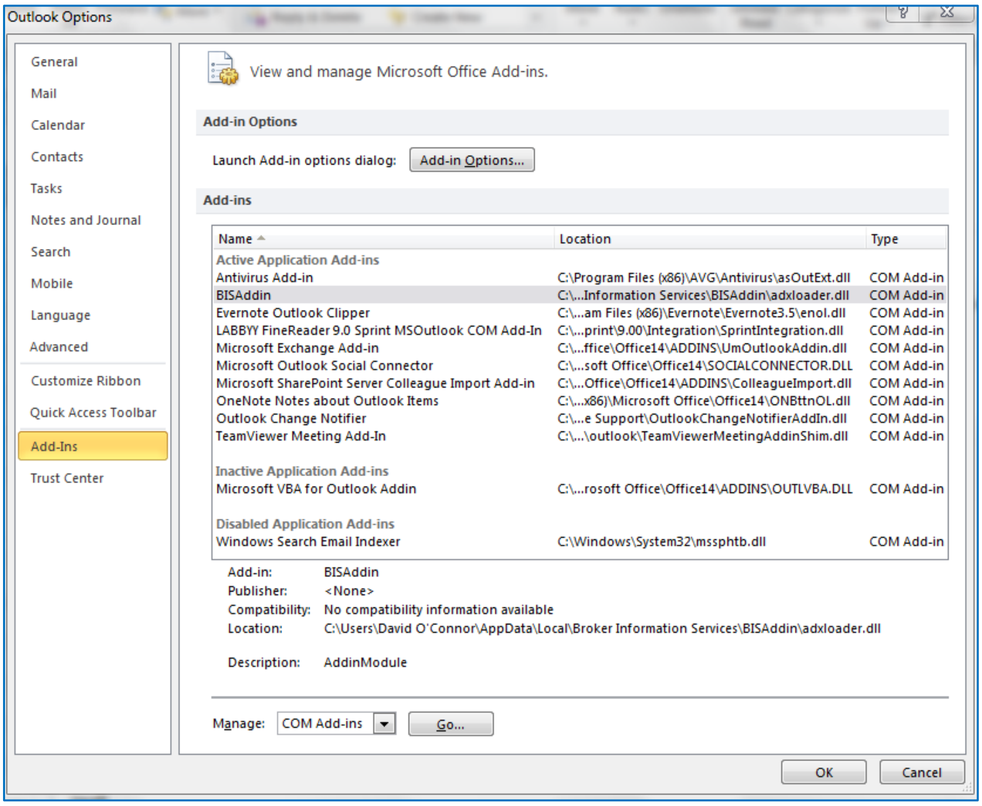


From here click “**Add Ins**”.

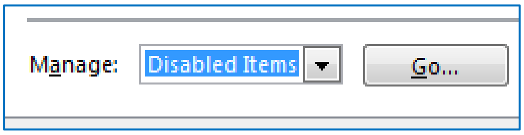


This will show you all the add ins you have in outlook.

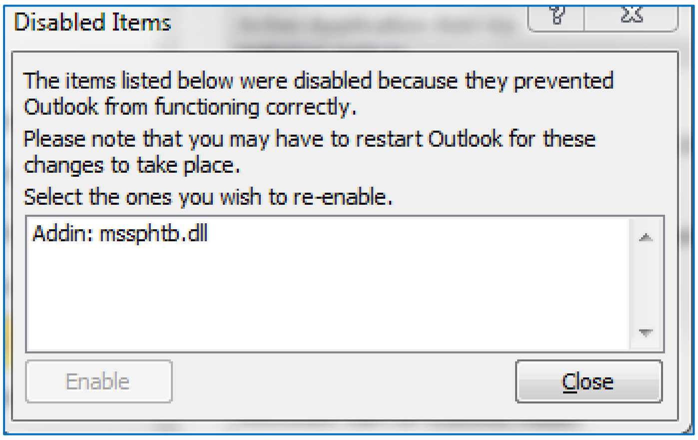
In the list you will see “**Inactive application add ins**” and “**Disabled application add ins**”



If you see "**BIS Add In**" in either of these categories, scroll down to the bottom of the window and you will see "**Manage**"



Click on "**Disabled Items**" and click "**Go**"



Click on "**BIS Addin**" and click "**Enable**"

What's the difference between client merge and associate?

If there are multiple entries of the same client you can merge them into one, so you can see them under the same client profile.

Client associations are links between two separate clients i.e. spouses so that you can

Which browsers does the platform work on?

The BIS Platform operates on all browsers including, Google Chrome, Firefox and any internet explorer higher than version 10.

Omnibroker reports don't open, all I see is a box with a Red X.

When installing Windows 7, instead of running the application to download the icon, Save the file to the desktop, then on the desktop right click and choose to "**Run as an Administrator**".

If it is not Windows 7 it probably hasn't allowed the "**eDrawer**" application to download.

How do I tag a handler?

At the home page hover the curser over the "**Features**" tab and click on "**Request user**".

This will bring you to the page shown below.

Click on the link "**Click here to open Omnibroker application form**".

SET UP FORMS & DOWNLOADS

Click here to open the Omnibroker Application Form

Click here to download the latest version of Omnibroker Launcher (Windows 7)

Click here to test PDF opens in browser

Click here to download our add-in for document management

This will download a PDF form called "**Omnibroker/ BIS Platform Data Instruction**".

Print out the form and complete this section with the details of the person you want to add as a handler.

OmniBroker / BIS Platform Authorised User Details

(Please note system Pin & Passwords are sent via text message. Mobile numbers are only used to facilitate a confidential circulation of login details)

Name: ______________________________

Email Address: ______________________________

Mobile Number: ______________________________

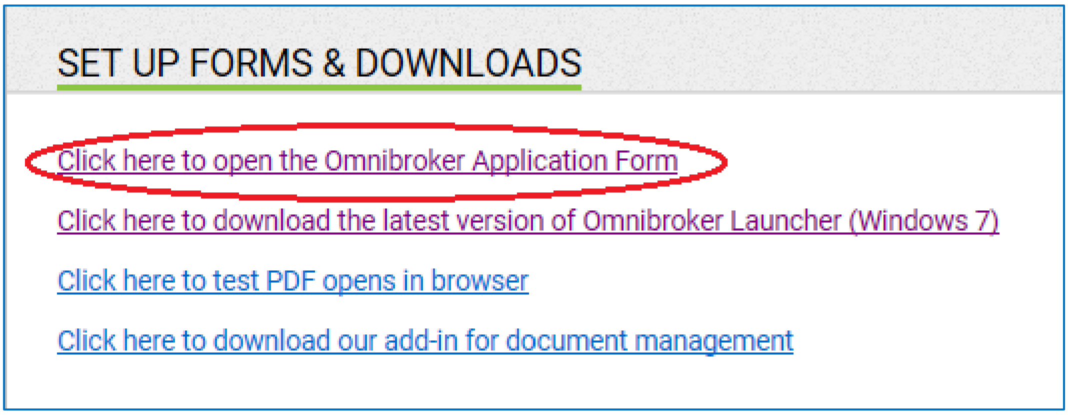
This two page form should be faxed, scanned / emailed or posted to Broker Information Services.

How Do I Add Agency Codes?

At the home page hover the curser over the "**Features**" tab and click on "**Request user**".

This will bring you to the page shown below.

Click on the link "**Click here to open Omnibroker application form**"



SET UP FORMS & DOWNLOADS

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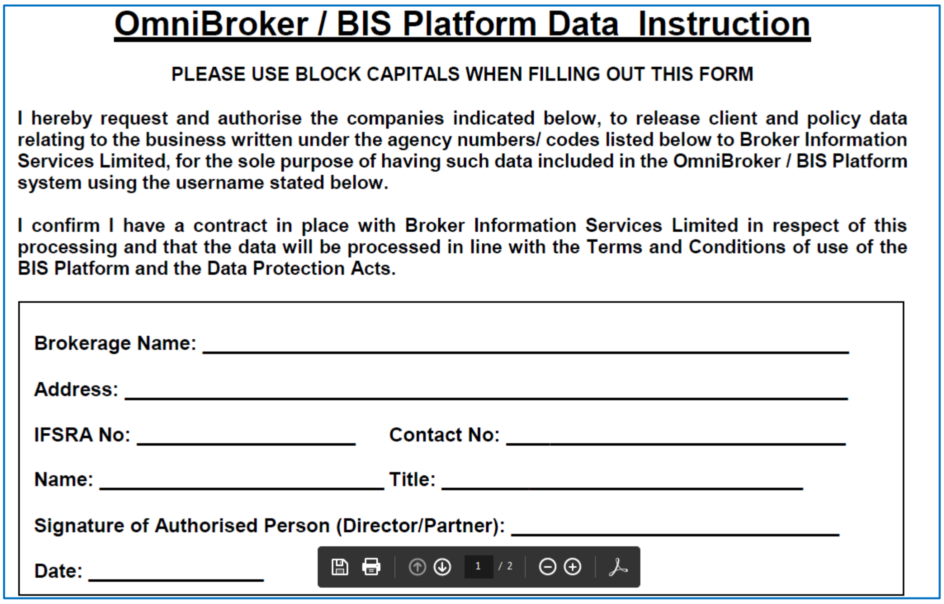


OmniBroker / BIS Platform Data Instruction

PLEASE USE BLOCK CAPITALS WHEN FILLING OUT THIS FORM

I hereby request and authorise the companies indicated below, to release client and policy data relating to the business written under the agency numbers/ codes listed below to Broker Information Services Limited, for the sole purpose of having such data included in the OmniBroker / BIS Platform system using the username stated below.

I confirm I have a contract in place with Broker Information Services Limited in respect of this processing and that the data will be processed in line with the Terms and Conditions of use of the BIS Platform and the Data Protection Acts.

Brokerage Name: ____________________

Address: ____________________

IFSRA No: ____________ Contact No: ____________

Name: ____________ Title: ____________

Signature of Authorised Person (Director/Partner): ____________

Date: ____________

This form must be filled out with the brokerage details, including the IFSRA no and the signature of the authorised person.

You can then provide agency codes on the second page of the form, shown below:

Authorisation / Instruction to:

Provider	Agency Codes
Aviva	
BCP	
Royal London	
Friends First 5 digits	
Irish Life e.g. NN77/ N777	
New Ireland e.g. 5 digits, letter	

This two page form should be faxed, scanned / emailed or posted to Broker Information Services.

Address: York House (Rear 176), Rathmines Park, Rathgar Road, Dublin 6.

Fax: 01 6335024.

Email: info@brokerinformationservices.ie

Multiple Quotes not Returning on Best Advice

If there are quotes not returning on best advice you should either upgrade browser or download and use Firefox instead.

Change” **Best Advice ID”** when logging in from “**Omnibroker**” or change “**Best Advise**” user ID on your user login.

When trying to open Omnibroker I get this warning “Run time 430 error”.

If you are getting the warning “**Run-time Error 430 - Class Does Not Support Automation or Does Not Support Expected Interface”** you may need to upgrade your internet explorer. Alternatively you can login online.

I don’t see any Tool bar on Best Advice

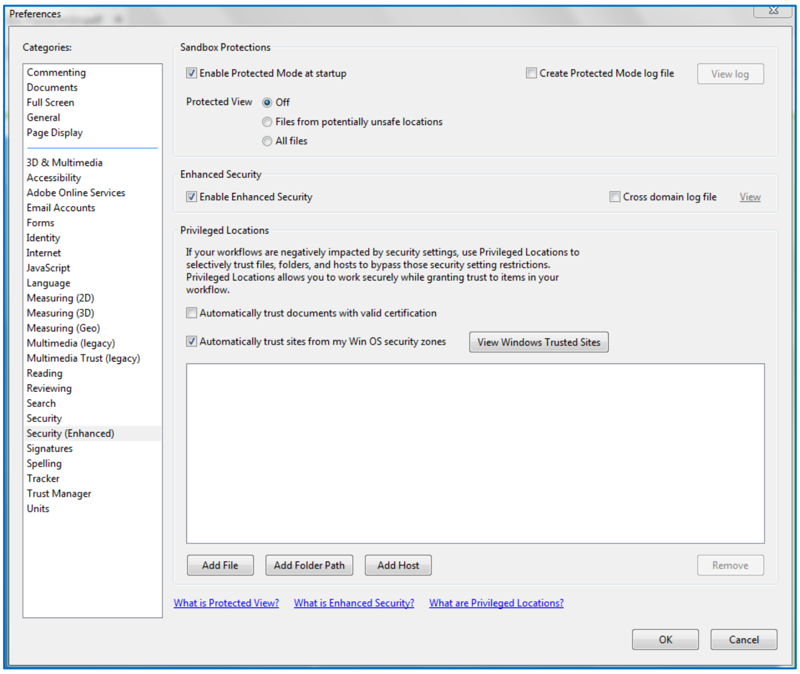
If you don’t see “**Best Advice**” in the tool bar I could be that java script is not enabled**,** start by using another browser to confirm.

If the Login button greyed out, you may need to re-install the “**Omnibroker**” launcher e.g. XP 0

When Generating a PDF From the Reports in Omnibroker – the Page Returns Blank.

Open a PDF and click “**Edit**” in the toolbar.

Scroll down and click “**Preferences**”.



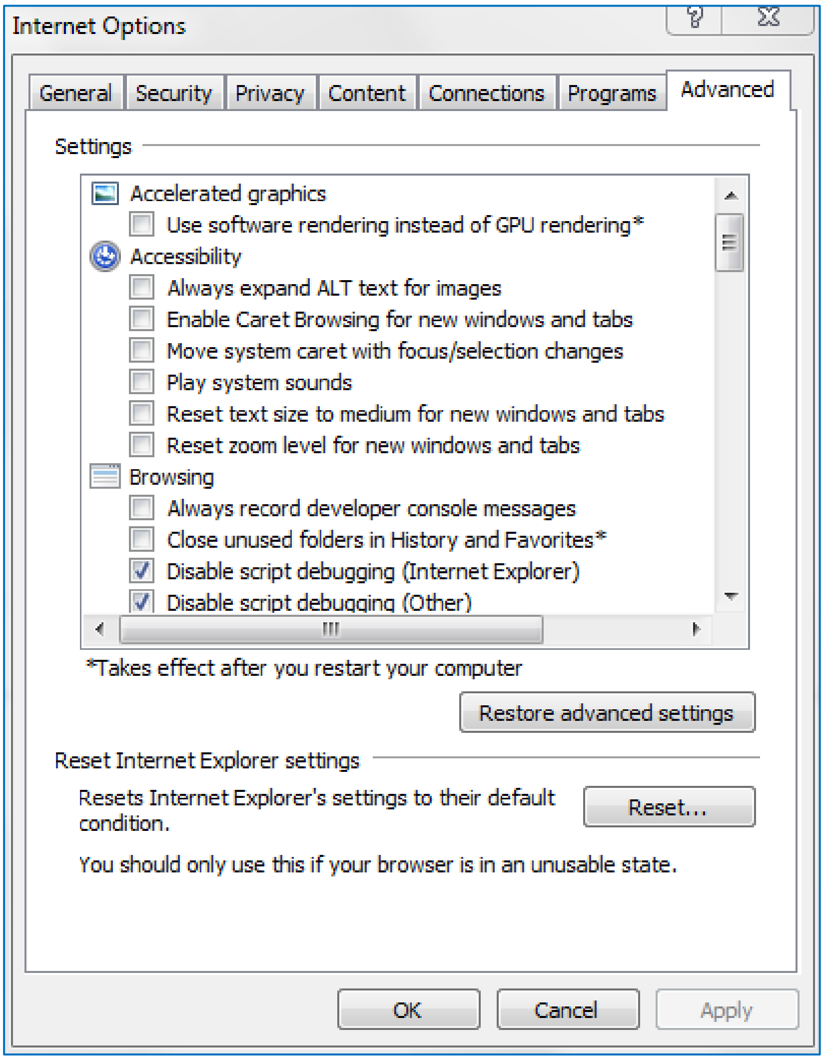
This will open a new window. Click “**Internet**” in the side panel and untick “**open in a browser window**”.

Close “**Omnibroker**” and open it up again.

If that doesn't work, try opening **"Open Internet Explorer".**

Click "**Tools"** at the top of the page and then click "**Internet Options"**.

Click the "**Advanced"** tab.

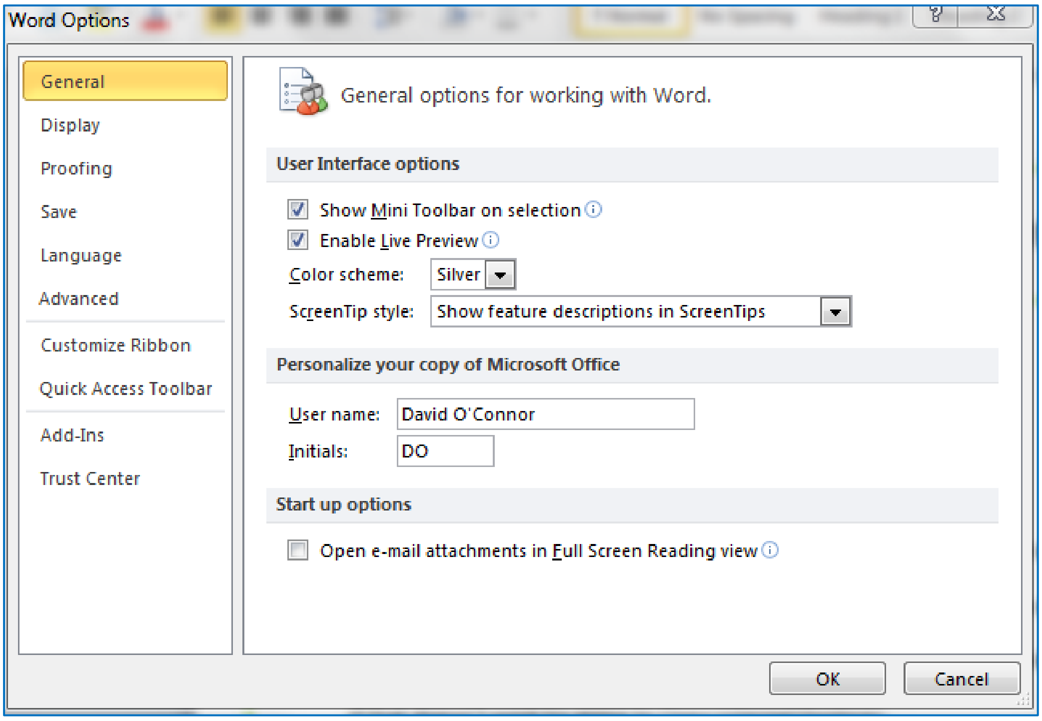


Under "**Reset Internet Explorer Settings"**, click "**Reset"**.

I Can't Print or Edit Omnibroker Reports/Letters.

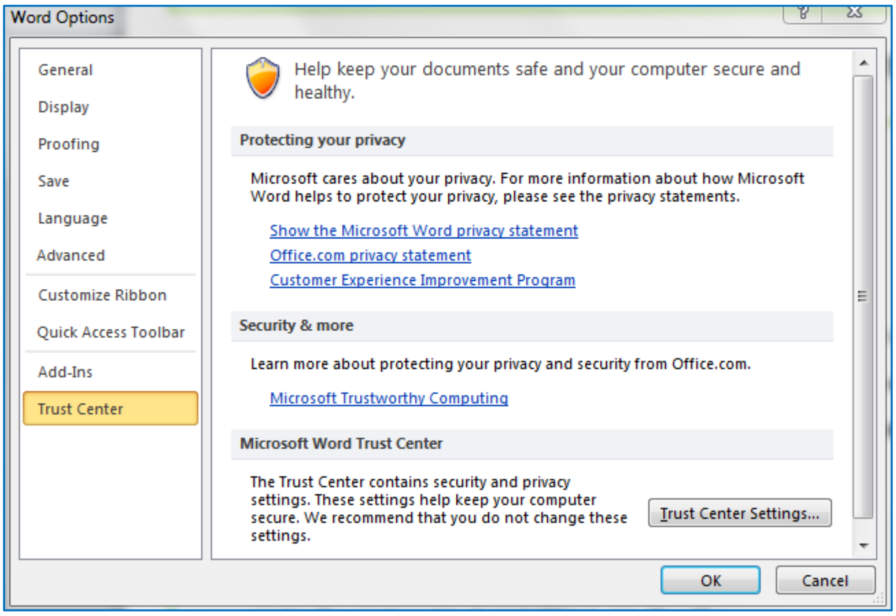
Open word 2010 and click “**File**”, scroll down and click on “**Options**”.

This will open up a window called “**Word Options**”.

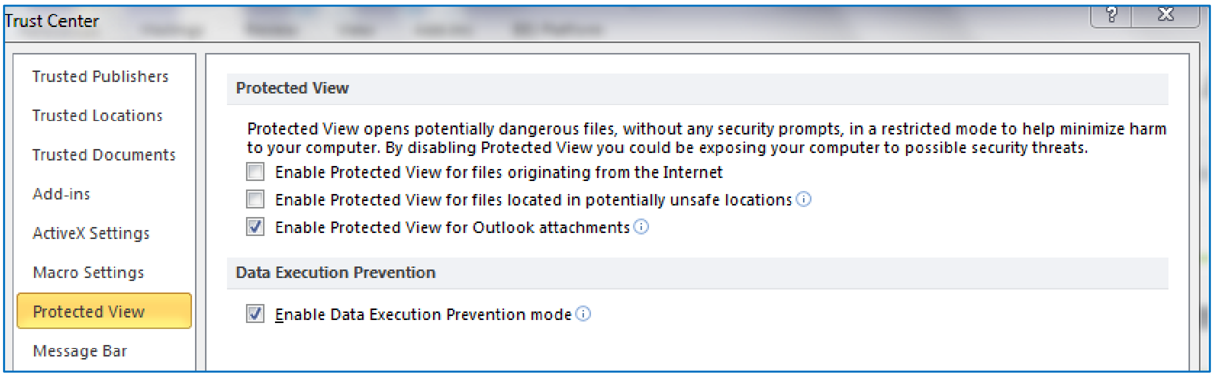


In this window, click on “**Trust Centre**” at the bottom of the panel on the left of the screen.

From here, click on “**Trust Centre Settings**” on the right hand side of the screen.



From here untick the box “**Enable Protected View for files originating from the Internet**”



If that doesn't work try going to Open Internet Explorer.

Click "**Tools"**, and then click "**Internet Options"**.

Click the "**Advanced"** tab.

Under "**Reset Internet Explorer Settings**", click "**Reset**".

Whenever I Complete a Risk Questionnaire Keeps Returning 0/100.

If the results to your questionnaire keep returning "**0/100**", it is most likely due to the customer answering 1 on question C.

"**Capital security is paramount even if returns are unlikely to keep pace with inflation**" choosing this option will automatically return a result of "0/100 conservative" as the client is extremely risk averse even if it means low returns.

I Have Accidentally Decreased the Font Size

If you have a mouse with a wheel and are using any of the below browsers, you can increase and decrease the size of your fonts in your browser by holding down the Ctrl key, and while continuing to hold down the key, move the mouse wheel up or down.

Alternatively you can press and hold the **Ctrl key** and press either the **+** (plus) or **-** (minus) keys on the top of the keyboard to increase and decrease the font.

All browsers also support pressing the Ctrl key and 0 (zero) at the same time to reset the font back to the default font.

I keep getting Automation Errors when Logging into Omnibroker with Windows 8

Firstly, download "**Omnibroker set up**" from **Best Advice** and save to desktop.

Right click on start menu and click on "**Run**"

This will open up a new window

In this window type "**msconfig**" in to the script bar and click "**OK**"

This will open the "**System Configuration**" window

Tick the box "**Safe Boot**" "**Minimal**", and click "**Apply**" and then "**OK**"

This will show you a window offering you to restart your computer

Click "**Restart**"

On restart double click on "**Omnibroker setup**" icon and run the install as normal

Repeat the first steps again and then *deselect* "**Safe boot**"- click "**Apply**" then click "**OK**"

Then restart.

OmniBroker Blank is showing Login Error although User Details Present

If Omnibroker login is blank try disabling "**AVG**" in the Add-on.

Click "**Tools**" and then scroll down and click "**Add Ons**"

Mail Merge Images

The image will need to be converted into a "**Jpeg**" or "**PNG**" and then you will need to create an image URL using postimage.org

Use the URL to embed in the mail merge editor tool by selecting the below and pasting in the URL.

Mail Merge Attachments

Files too large when trying to send as attachment by email merge

http://smallpdf.com/compress-pdf

Omnibroker Reports are Opening to gibberish

Firstly, check if the "**ActiveX**" message is coming up on login, click "**Allow Always**".

Check in "**eDrawer**" is present & enabled on "**Manage add-ons/All add-ons**" – then re-download.

Add or change trusted sites to medium low and check that security isn't blocking "**eDrawer/ActiveX**"

If you are operating on Windows 10, you may have to change your default browser from "**Edge**" to "**IE11**". Below is a link on how to do this.

http://home.bt.com/tech-gadgets/computing/not-keen-on-microsoft-edge-heres-how-to-change-your-default-web-browser-on-windows-10-11364000481508

Emails are Not Arriving from Email Merge

The most common reason for an email sent from our system being rejected is due to an incomplete "**SPF record"** for your domain.

Your "**SPF record"** specifies which servers are authorised to send emails from your domain.

Because you use our system to send emails from your domain you need your SPF record to include our servers.

To action this you need to contact the person who provides you with your email and ensure that the following are added to your SPF record (they should know what this means).

server1.brokerinformationservices.ie

I Can't Open Word – Word 2007

Turn off "**Protected View**" in trust centre settings.

So add "**OmniBroker**" to trusted sites and sent security level to medium low, then on log –in.

You need to click to allow "**ActiveX**" content before proceeding.

Open "**Outlook**" and click on file.

Scroll down and click on "**Options**"

This will open the "**Outlook Options Window**"

Click on "**Add Ins**" on the left side of the screen and look for "**BIS Add In**".

If it's under the deleted section you need to re-enable it.

Go to bottom of screen – click "**Manage**" and choose Deleted item and click on "**Go**".

The next screen allows you to choose the "**Add-ins**" to be re-enabled.

Document Management Disabling Every Time Outlook Closed/PC Shut Down

Office add-ins disabled in “**Word**”, “**Excel**” or “**Outlook**”.

First, see this article on how to activate the inactive add-ins or enable the disabled add-ins: https://support.netdocuments.com/entries/22201018-Enabling-NetDocuments-Integrations-in-Office

If you have tried the solution referenced above and the “**Add-Ins**” are still not loading when the application is opened, then it may be due to a “**Registry Setting**”.

This registry setting determines how the “**Add-In**” is loaded in the application. This article describes how to adjust this registry setting.

In Add-ins in “**Word (or Excel/Outlook)**” you will see the current load behaviour of the particular add-in.

The load behaviour of the add-in should be set to "**Load at Start-up**".

The load behaviour is "**Unloaded**" then follow these steps:

Open your registry editor. To do this, open your Windows Start menu and type "**regedit**".

Go to HKEY_CURRENT_USER > Software > Microsoft > Office > Word > Addins > ND.Of2007Int. Note what the “**LoadBehavior**” is set to.

It will be a number like 0 or 1 or 3.

If the “**LoadBehavior**” is anything other than "**3**" then follow these steps:

1) Close “**Word (or Excel or Outlook)**”. Make sure the "**winword.exe**" process is not running in the Windows Task Manager.

2) Open the registry editor again. Double-click the registry key to edit it.

3) Change the Load Behaviour to "**3**". Close the registry editor.

4) Re-open the registry editor to ensure "**3**" is still there.

5) Open “**Word**”. The add-in should now load automatically at start-up.

If these five steps do not fix the Load Behaviour you may have to go a step further and run a repair on the Application Integrations. This can be done through Control Panel / Programs and Features.

NOTE: If the Load behaviour reads the following message, you have a 64-bit version of Office installed. The integration add-in will not load in this environment.

How Do I Add an Image to a Document in Mailing?

To add image to document in mailing

Firstly, go to "https://postimage.org/"

Choose your image and upload.

Choose "link and copy".

Go back to Omni broker and go into letter and click in body of letter where you want image placed.

Then click on image icon see below and paste the image URL. Here you can adjust size etc.

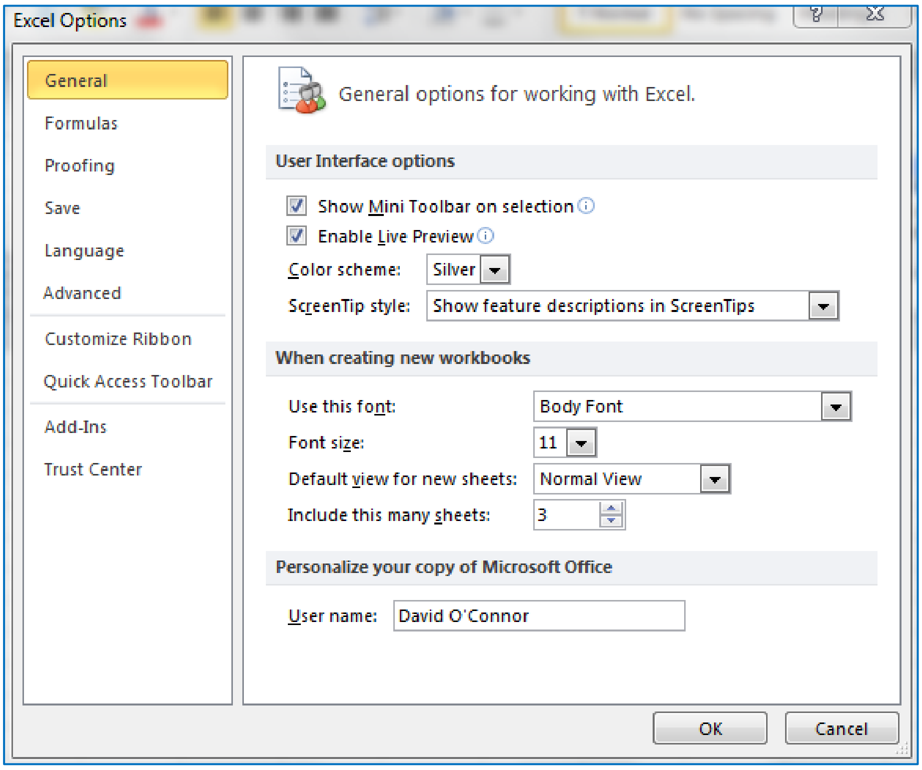
Excel Reports on Omnibroker Keep Opening Blank

This can be due to Excel being set on protected view.

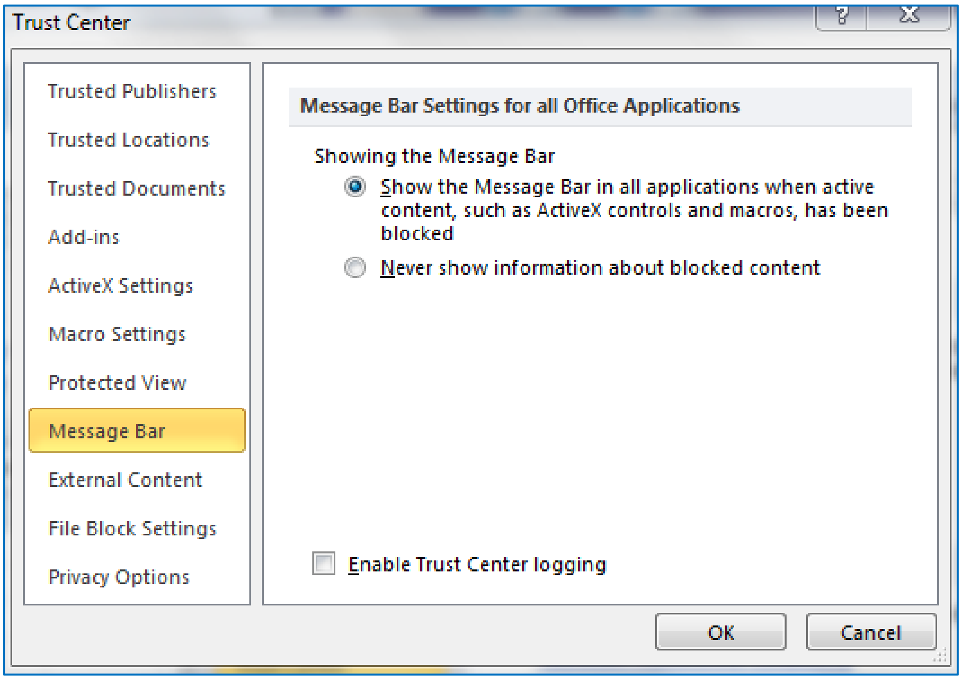
Firstly open "**Excel**" –and click on file.

Scroll down and click "**Options**".

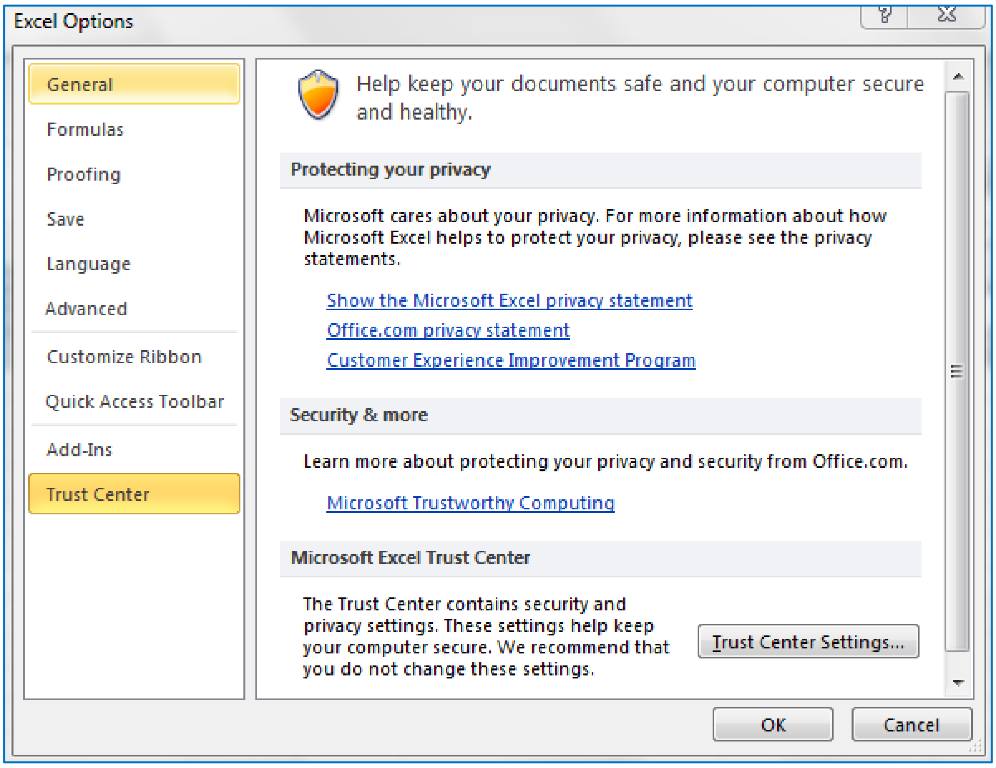
This will open a window called "**Excel Options**".



Click on "**Trust Centre**" on the left side of the page and then click on "**Trust Centre Settings**".



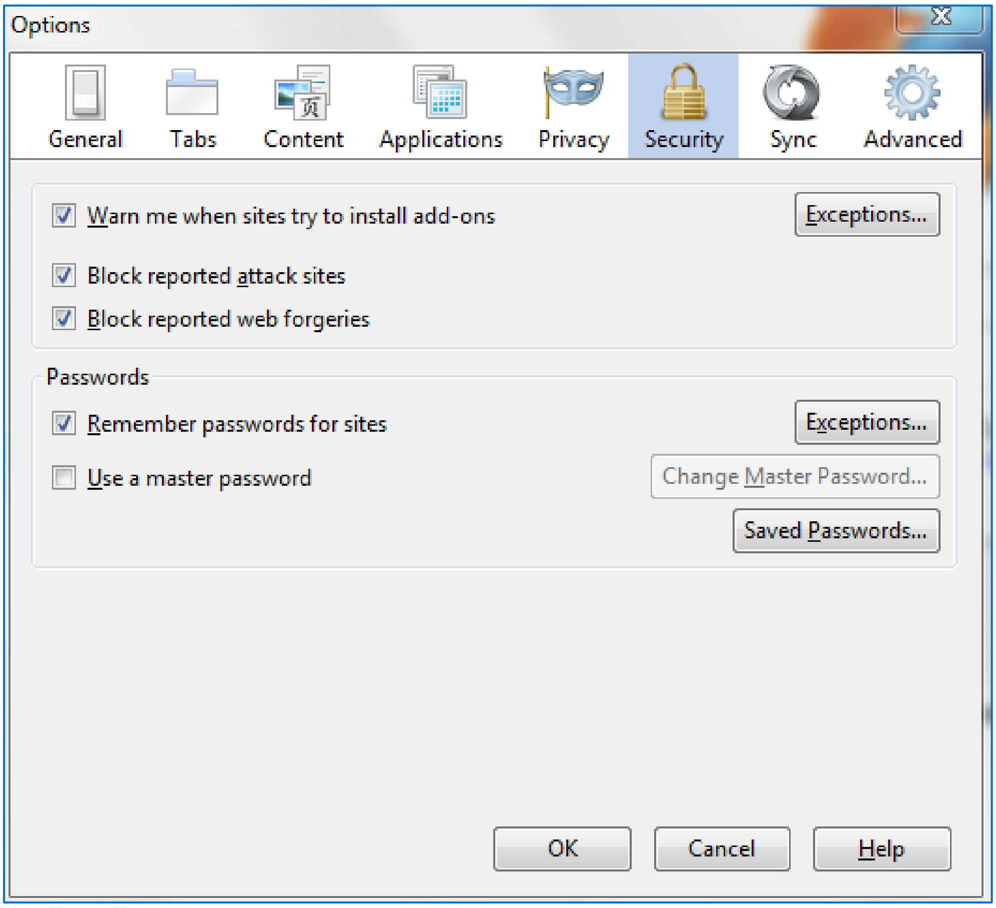
Click on "**Protected View**" on the left of the page and untick the box "**Enable Protected View for Files Origination from the Internet**".



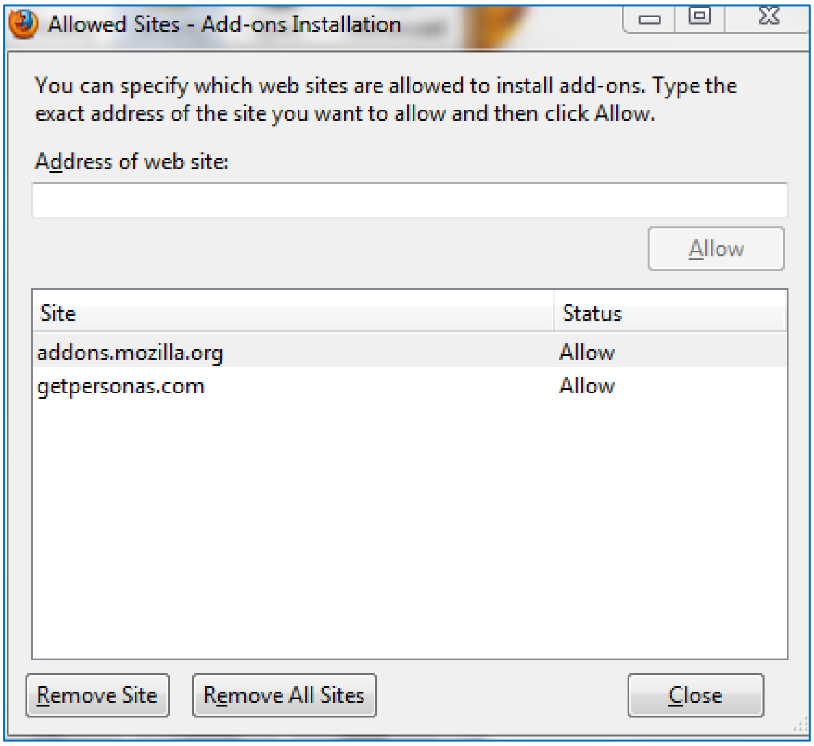
How Do I Add Trusted Sites to Mozilla Firefox?

Open your Firefox browser, and then click on the “**Firefox**” in the top-left corner.

From the drop-down menu select “**Options”.**



Click on the "**Security"** tab, then on the upper "**Exceptions"** button.



You can now enter or remove the URLs of trusted site.

When entering URLs, please include the full address of the website, without any sub-sections.

A sub-section is divided from the main URL by "**/**".

When you want to enter the address of the site, include everything between the first "**/**" symbol, if any.

If you add the address with the sub-section you'll only flag the sub-section as a trusted site and the rest of the site will still be considered unsafe by the browser.

How Do I Stop Pop Ups on FireFox?

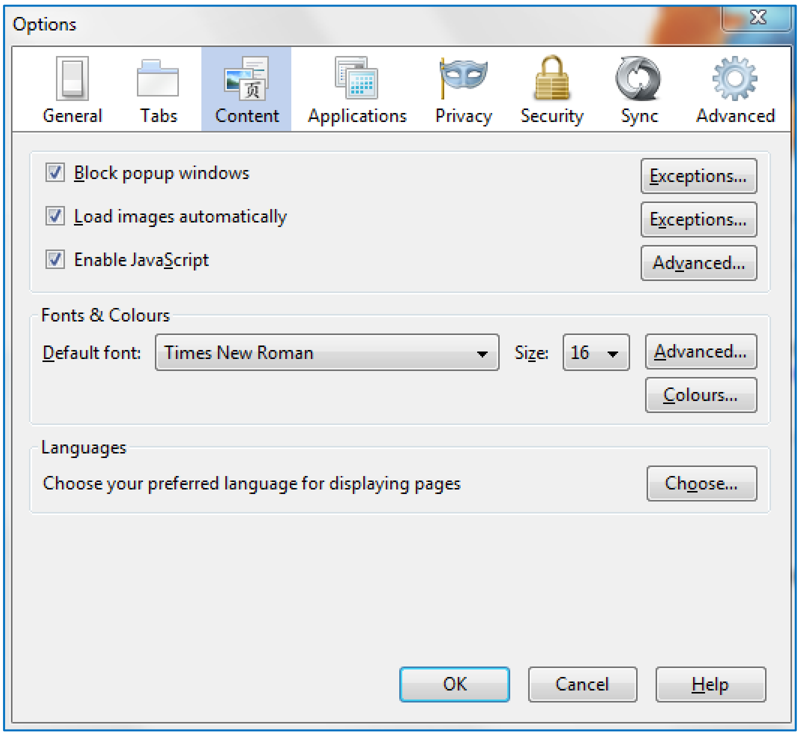
Open the "**Mozilla Firefox**" Browser.

Click on the drop down menu on the top left corner of the Firefox browser, and select "**Options**."

This will open the "**Options**" window.

Click on the "**Content**" tab at the top of the window.

Tick the box beside "**Block pop-up windows**".



Click the “**OK**" button.

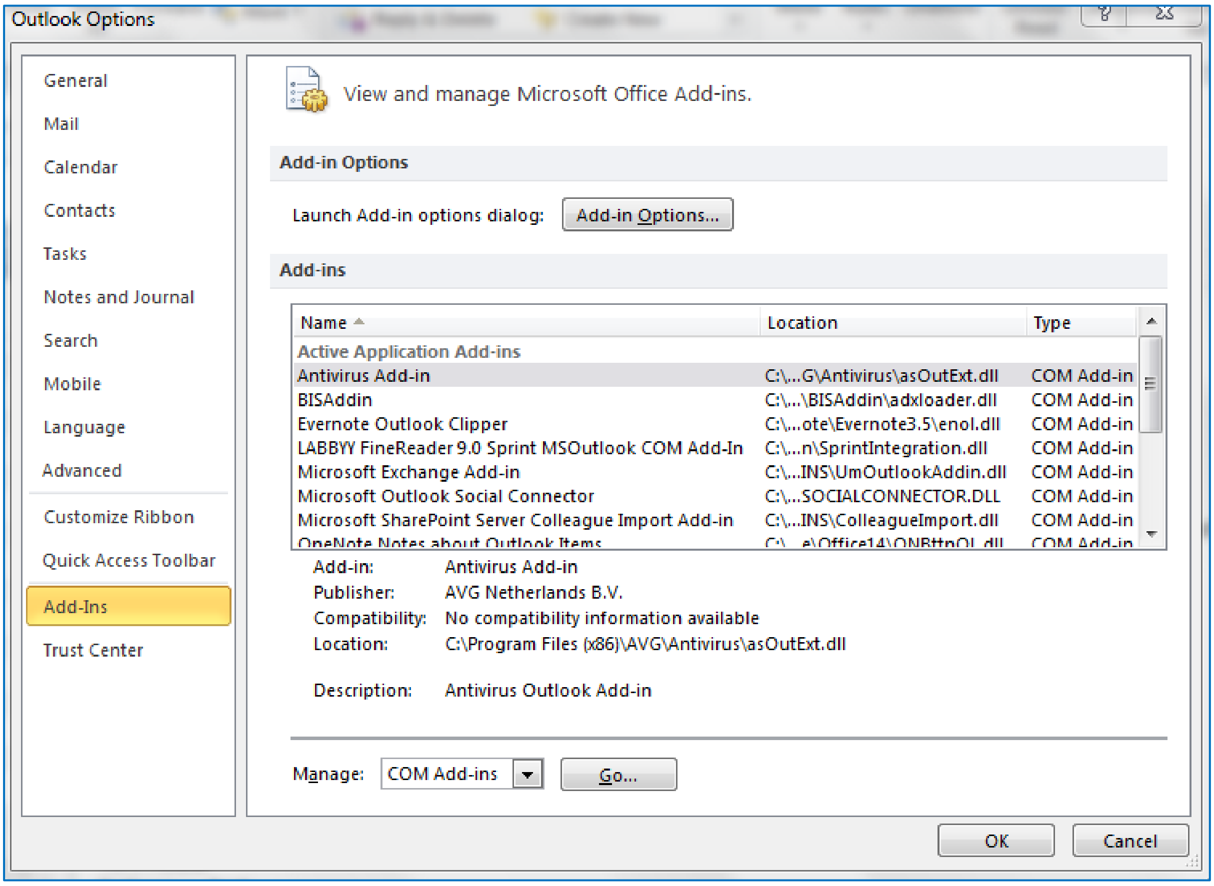
Pop-Up Windows are now blocked in Mozilla Firefox Browser.

How to find and Disable Outlook Add-ins and Plugins

Disabling unnecessary plugins is a great way to make your “**Outlook**” start faster, run more reliably and take less memory.

In Outlook click on “**File**” and scroll down to “**Options**”.

This will open a new window. On the left of the page click on “**Add Ins**”



There are two types of “**Add ins**”

“**COM Add-ins**” and “**Exchange Client Extensions**”.

You must disable COM Add-ins:

To do this, Select “**COM Add-ins**” in the Manage drop-down at the bottom of the Trust Center window and click “Go”.

Uncheck any add-ins that you are not using.

Note: If you see “**The connected state of Office Add-ins registered in HKEY_LOCAL_MACHINE cannot be changed**” see this article for help with disabling those add-ins.

How Do I Enable TLS and SSL on the Internet Explorer?

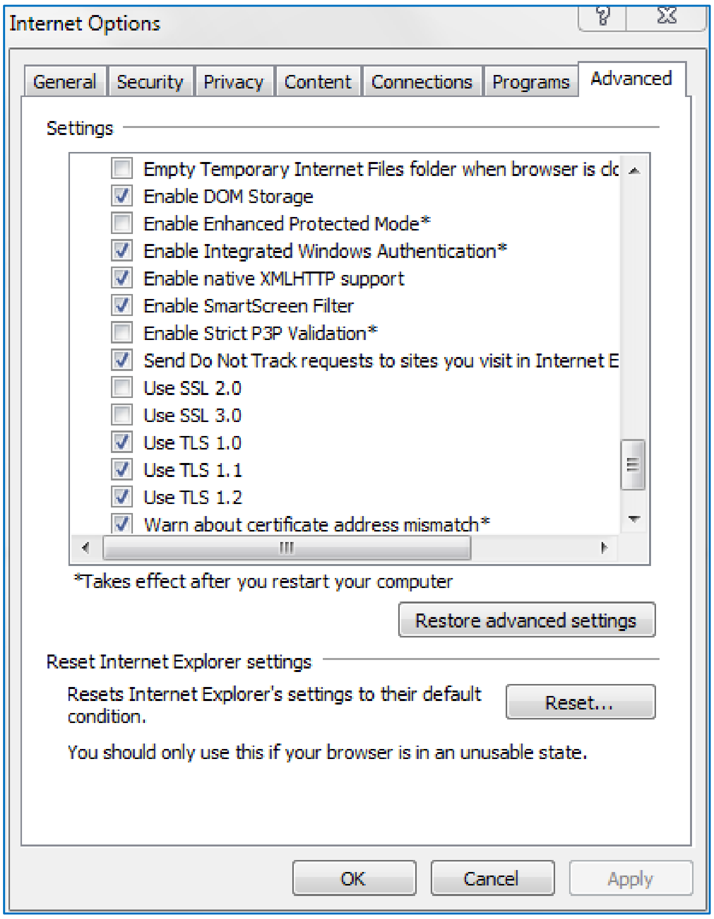
The message came up to enable **TLS** and **SSL**.

Open up "**Internet Explorer**" and click "**Tools**" on the top of the page.

Scroll down to "**Internet Options**".

This will open up a new window.

At the top of the window click "**Advanced**" and scroll down until you see "**Security**"



Under security you should tick the boxes beside. **"Use SSL 2.0"**

"Use SSL 3.0"

"Use TLS 1.0"

"Use TLS 2.0"

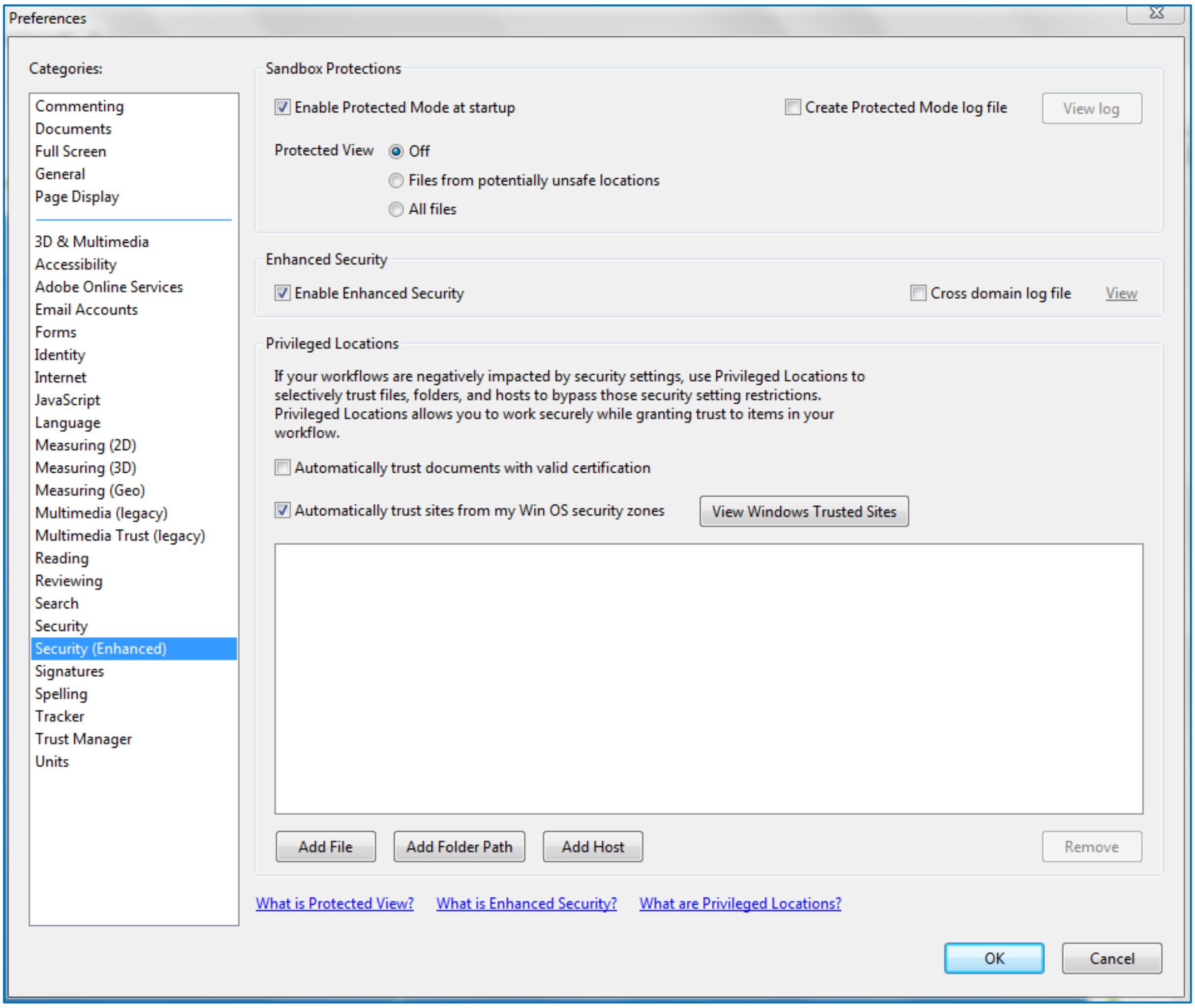
"Use TLS 3.0"

The PDF is Not Loading to the "BIS Scan Uploader".

There is a problem with Adobe Acrobat/Reader.

Firstly, open any **PDF** file and click on "**Edit**" at the top of the screen.

Scroll down and click on "**Preferences**".



Click on "**Security (Enhanced)"** and untick box beside "**Enable Protect Mode at Start-up**".

Click on "**OK**" and close, the **PDF**.

How Do I Get Rid of Internet Explorer Script Error Pop Up?

Turn off the Scripting Debugger (for Internet Explorer 7)

Firstly, Start Internet Explorer.

Click on “**Tools**” at the top of the screen, scroll down and click “**Internet Options**”.

This will open a new window.

(If you can't see the Tools menu, press Alt to display the menus).

Click the “**Advanced**” tab on the top right of the window.

Scroll down and tick the box “**Disable Script Debugging**” and click “**OK**”.

Please check the YouTube video as well:

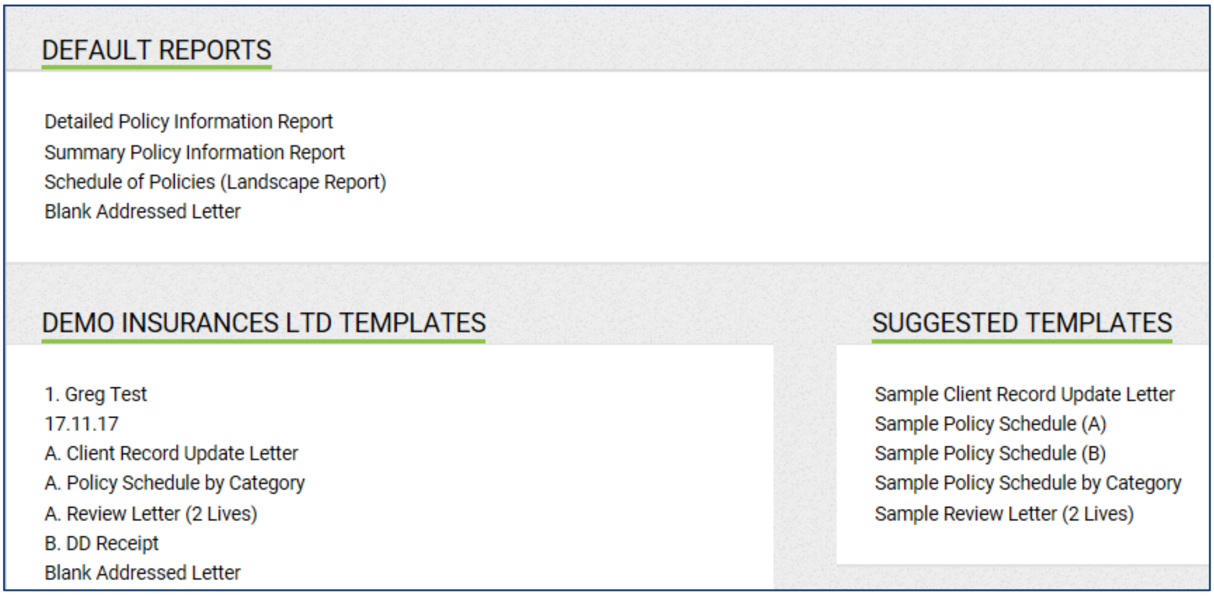
https://www.youtube.com/watch?v=_dhmYbll0n8

Creating a Report (Template)

Click into the client profile and click on **"Create Report"** in the actions panel.

This will bring you to a page that will show you **"Default Reports"**, and "**Suggested Templates**".

You can use these pre made templates for your report if you so wish.

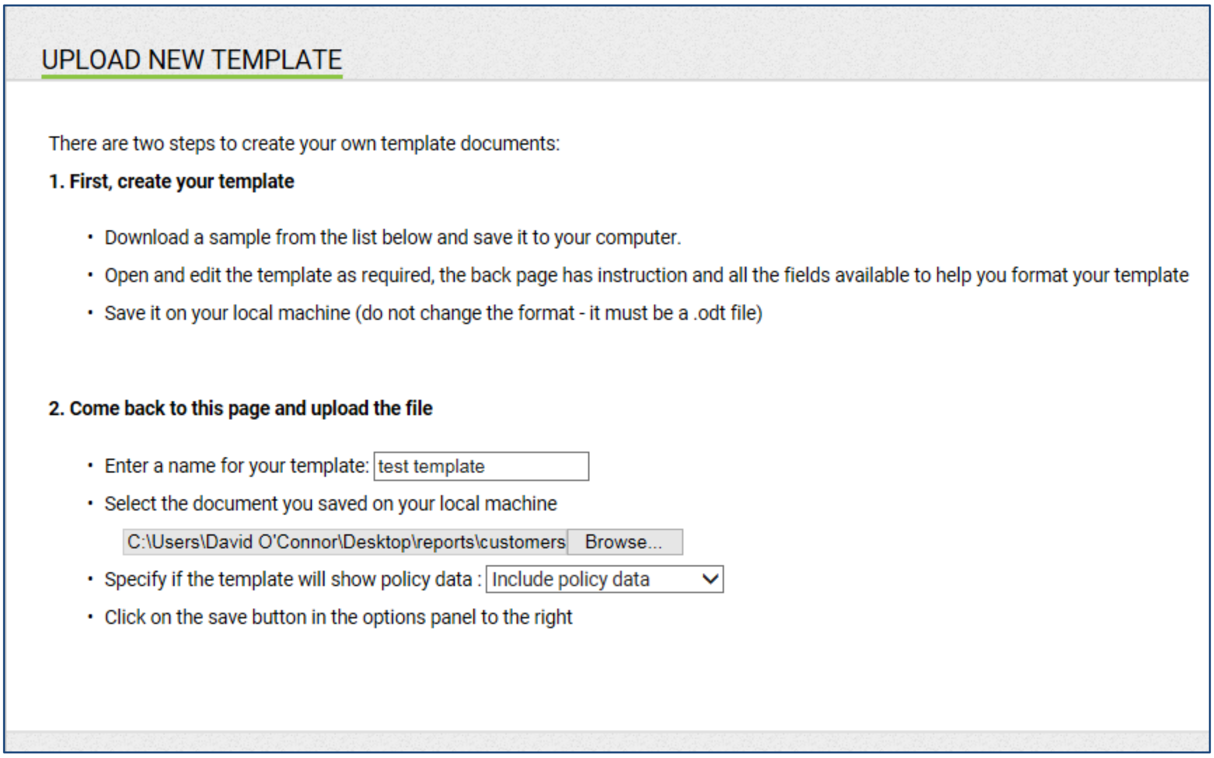


However, if you wish to create your own report.

Click on **"Manage Templates"** in the tasks/actions panel.

Then click on **"New Template"** on the next page.

This will bring you to the following page:



Click on **"Available Data"** in the tasks/actions panel**.**

This will bring up the following window:

Available Data Fields

Fieldname	Description	Sample Data
customer_id	Customer Id	3923726
customer_name	Customer Name	David OConnor
customer_address1	Customer Address1	39 Grange downs
customer_address2	Customer Address2	Rathfarnham
customer_address3	Customer Address3	
customer_address4	Customer Address4	
customer_phone	Customer Phone	0863658513
customer_mobile	Customer Mobile	086-3658513
customer_fax	Customer Fax	
customer_email	Customer Email	ocodave@gmail.com
customer_title	Customer Title	
customer_firstname	Customer Firstname	David
customer_surname	Customer Surname	OConnor
customer_file_ref	Customer File Ref	
customer_notes	Customer Notes	test
customer_gender	Customer Gender	Male
customer_dob	Customer Dob	02/01/1989
customer_phone_work	Customer Phone Work	
customer_review_date	Customer Review Date	
customer_occupation	Customer Occupation	manager
customer_marital_status	Customer Marital Status	Single
customer_smoker	Customer Smoker	No
customer_status	Customer Status	
customer_employment_status	Customer Employment Status	Employee
customer_fee	Customer Fee	0

Under **"Fieldname"** are all the code words for to use in your report template.

For example, typing **"customer_name"** will show the customers full name in the completed report.

Open up a new word file on your desktop.

In a word document, type out the template you wish to save, using the **"Fieldname"** code words from the "**Available Data"** window.

Below is an example of a **"Customer Letter With Policy Documents"**.

customer_name
customer_address1
customer_address2
customer_address3
customer_address4

xdate

Re: Policy p_number1 with p_insurer1

Dear customer_firstname,

Please find enclosed your policy documents for your p_desc1 with p_insurer1 which commenced on p_start_date1 and ceases on p_end_date1.

Thank you for choosing Highfield Financial Planning.

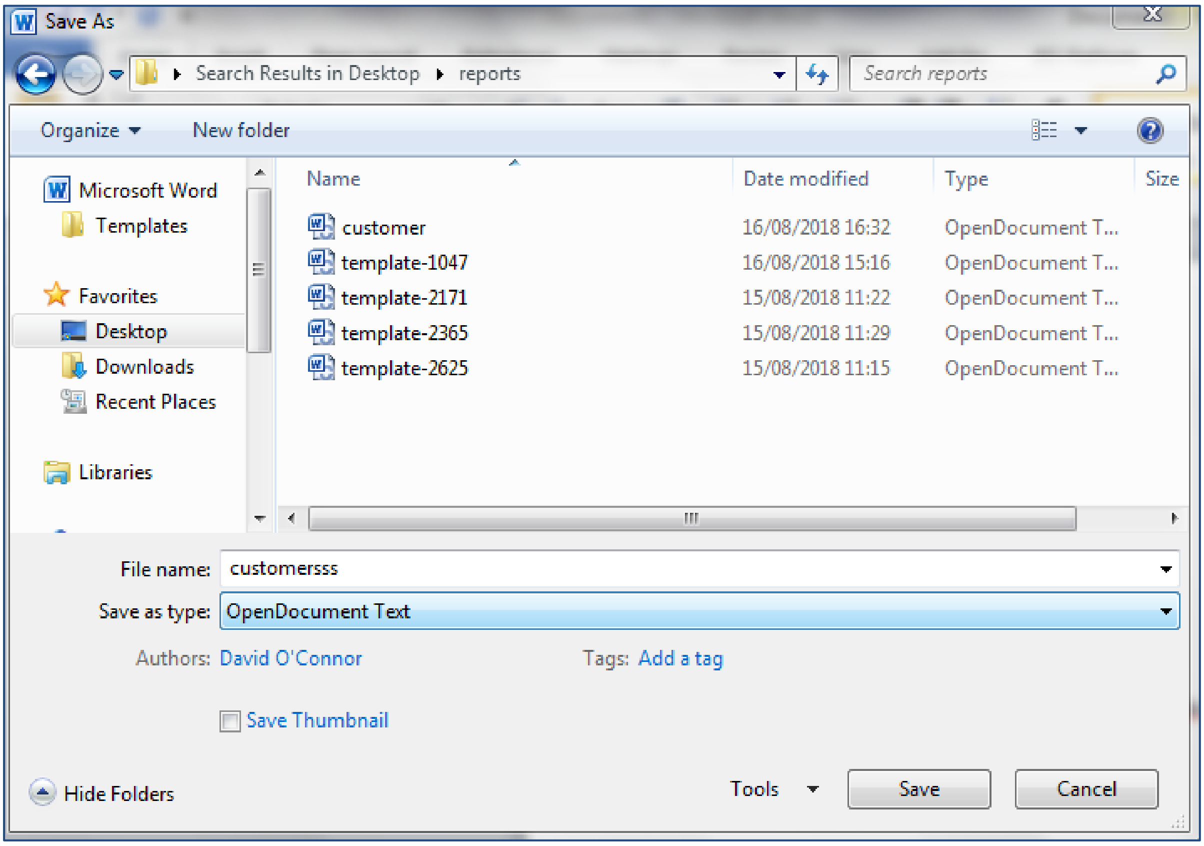
Kind regards,

____

user_firstname user_surname

When you have completed the template, click **"File"** and then **"Save As"** to save it to your desktop.

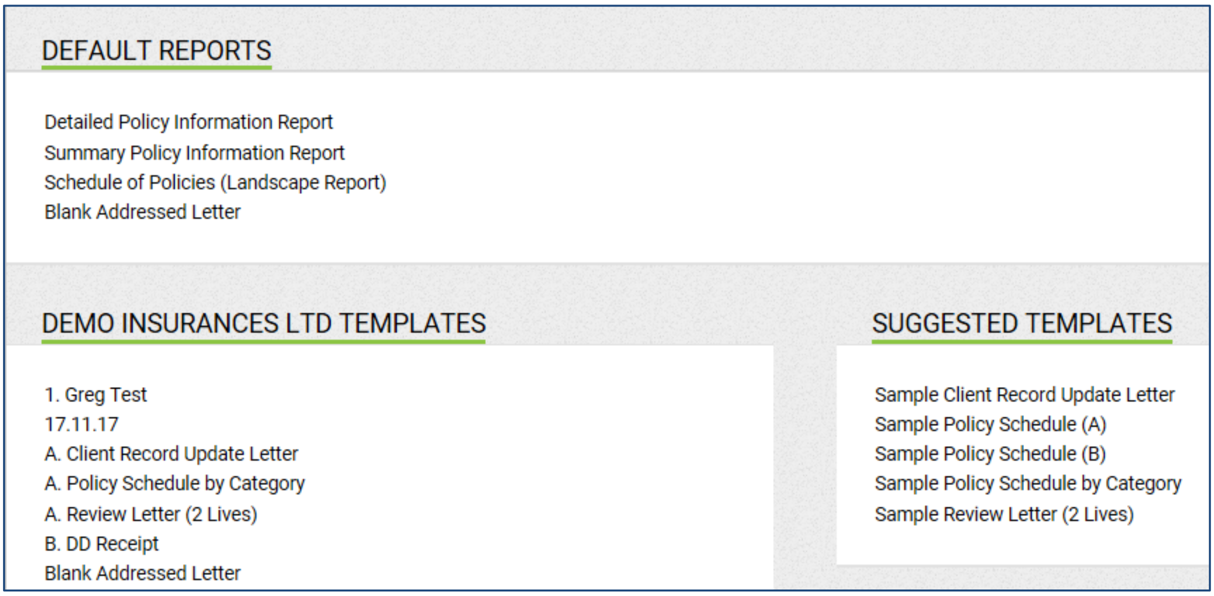
You must save it as an **"Open Document Text"**.



Open up the platform and select the client you wish to make the report for.

Click into the client profile and click on **"Create Report"** in the actions panel.

This will bring you to a page that will show you **"Default Reports"**, "**Suggested Templates**" and "**Demo Templates".**



Click on **“Manage Templates”** in the tasks/actions panel.

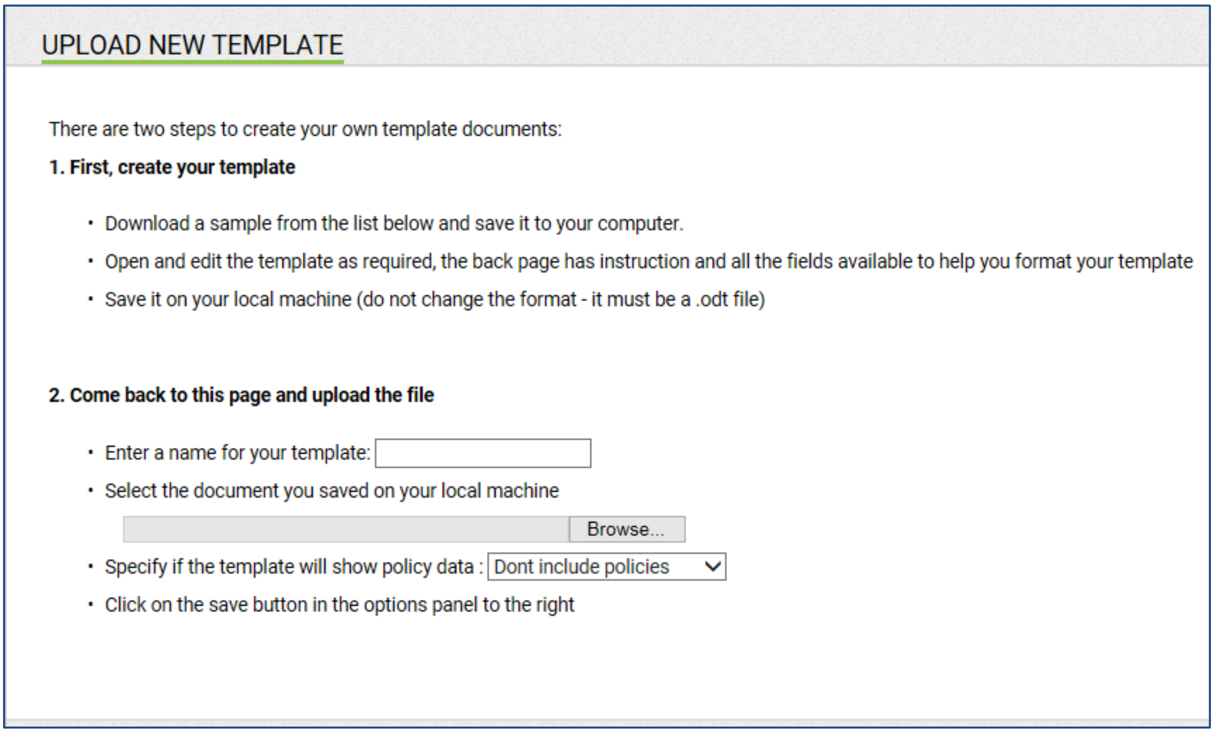
This will open a new page showing you existing templates.

MANAGE TEMPLATES

1. Greg Test	download template	upload template	delete
A. Client Record Update Letter	download template	upload template	delete
A. Policy Schedule by Category	download template	upload template	delete
A. Review Letter (2 Lives)	download template	upload template	delete
B. DD Receipt	download template	upload template	delete
Cover Letter with Policy Docs July	download template	upload template	delete
Customer Record Letter	download template	upload template	delete
dave test test test	download template	upload template	delete
General Policy Docs Letter	download template	upload template	delete
Half year review letter	download template	upload template	delete
Letter with Pol Docs Aviva	download template	upload template	delete
Letter with Policy	download template	upload template	delete
Letter with Policy Docs	download template	upload template	delete

Click on **“New Template”** in the tasks/actions panel.

This will bring to the following page:



Enter a name for your template.

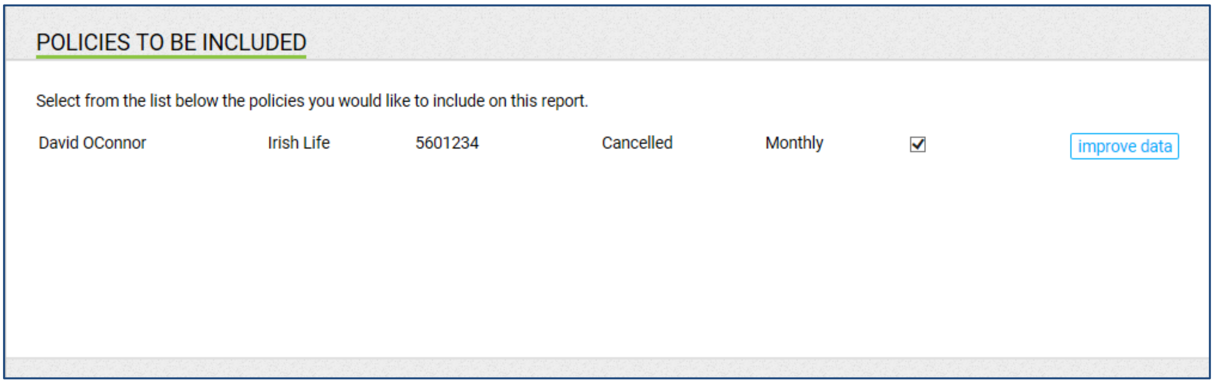
Browse your desktop and find your saved template.

Specify if the template will show policy data.

Then click **"Save"** in the tasks/actions panel.

Your template should now appear on the **"Templates"** page.

Click on the template you have saved and you should be brought to the following page:



Click on **"Create Report (Word)"**or "**Create Report (PDF)".**

This will create your finished report with all the data fields completed.

Below is the completed **"Customer Letter With Policy Documents"** report:

Jon Walters
2 Castle Avenue
Rathmines
Dublin 6

17/08/2018

Re: Policy 45678123 with New Ireland

Dear Jonathan,

Please find enclosed your policy documents for your Executive Finance Plan with New Ireland which commenced on 01/02/2016 and ceases on 08/05/2043.

Thank you for choosing Highfield Financial Planning.

Kind regards,

David O'Connor