BIS Dashboard

A guide on how to navigate the New BIS Dashboard:

New Features:

- **Total Customers, Total Policies & Total AUM**

This section will display your Total amount of Customers, Policies and the Total AUM Value instantly as you log in to The BIS Platform. You can access these figures through the reports section also however, now they will be up front and centre.

- **Last 10 Policies**

Your Last 10 Policies written will appear under this area which displays policy number, client name & policy category. If you click on any of these policies, it will bring you to that policy detail page for a closer view.

- **Top 10 Customers**

Your Top 10 Customers by volume of Total AUM will be listed. This section displays the customer name and their Total AUM value. If you click on these customers it will direct you to their client profile.

- **Business Contacts**

Business Contacts allows you to list your most frequent contacts on The BIS Platform Dashboard. You can add any Business Contacts through the Tools Menu. As you click on a contact, their name, company, role and contact details such as email and phone numbers will all be listed. This area will make it easy for you to access details through The BIS Platform.

- **AUM Chart / List**

The AUM pie chart will give you a bring a visual aspect to the Dashboard. As you hover over each section on the chart, you will get feedback on the Total AUM Value and percentage filtered by provider. You can also click the widget at the top right of this section to change this view to a list, which lists the supplier with their Total AUM.

Existing Features:

- **Quick Search**

The Quick Search facility allows you to search by Client name, policy number or mobile / email. Alternatively you can select the enter key which will bring up your entire client portfolio. Under the Customer Menu you can also search for Clients.

- **Workflow**

Your Workflow will displays any Tasks in your diary, any active Compliance events, active Pipeline deals and Maturities. You can click on the wording of these options and it will bring you to each section to view the numbers reflecting on the graph.

- **New Business graph**

The New Business graph will display any business written in the months shown. To get a more detailed view of your new business, you can visit the Business Intelligence page under the Sales menu where you can filter further.

- **Investment Research & Protection Quoting Shortcuts**

Through these sections you can access shortcuts for pensions product listings, digital funds centre, risk questionnaire, term quotes, income protection quotes and pension term quotes. All of these areas can be accessed through the Funds menu, Investment menu, Pension menu and Protection menu.

- **Client Meeting**

The Client Meeting section includes Pdf documents of fact finds, proposal forms, risk questionnaire and your TOB. You can also add your own Pdf documents to the Client Meeting section through the User Preferences under the Tools Menu in the area called Homepage Shortcuts.

- **Industry News**

The Industry News panel on the left of the Dashboard is updated regularly and shows any recent articles / news published in the industry.

At the top of the Industry News panel, there is a settings widget where you can customise the New Dashboard to your liking, ticking and unticking the checkboxes to include each section.

