Irish Life

MyBiz Mobile App

The MyBiz mobile app allows you to keep up to date with your customer's plans while on the move. The app is available to download on Iphone, IPad, Android and Windows phones.

How do I register?

The first time you log onto the system you will need to enter your B-line / Execution user id and password. This will then register your profile on your phone. The next time you log in you will only need to enter your password.

What can I do?

Below is an outline of just some of the features of the app.

Pipeline alerts

The MyBiz mobile app keeps you right up to date with your pipeline. As your new business moves through the pipeline you will be kept updated each step of the way. The app will alert you when:

- A new proposal is submitted
- Requirements are added, updated and completed.
- Requirements are coming due.
- The plan issues.

Existing customer alerts

The app also lets you know what's happening with your existing customers.
The app will alert you when:

- Plans are about to mature.

- Plans are coming up for review.

- A payment is missed.

- A customer has made important contact such as requesting a value or downloading a claim form.

Your customer's details at your fingertips

With the MyBiz mobile app you can get access the details for all of your customers. You can search by name or enter a plan number.
For each customer you can see:

- Basic name and address details.

- Contact details.

- Premiums paid and payment method.

- The benefits screen showing any life and illness benefit details on the plan.

- Plan values and funds summary, where applicable.

- New Business and Underwriting requirements.

- Letters and documents being sent to the customer.

Push Notifications Available!

The MyBiz mobile app also has a push notification feature. So when something happens with your pipeline or there is a new customer alert, a notification will be sent to your phone, even if you're not currently using the application. When you receive a push notification the app shortcut will update, showing a number of new icons.

The push notification can be disabled at any time through the application settings.

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