



WinBEAT NEXT Application Form



Company Details (Primary Location)

Company Name:

Trading as (if Applicable):

ABN:

Company Contact Details (Primary)

Phone:

Mobile:

Business Website Address (if applicable):

Company Address(es)

Address:

Postal Address (if different from above):

Type of business

- Registered Broker
 Authorised Representative
 Underwriting Agency

AFS License No:

WinBEAT NEXT Application Type

- Single User Only. (Any 1 user logged in at any one time)
or
 Multi-User. Initial User Level Required:

What system are you currently using (if any)

Desired Contract
Start Date

Do you require a quotation for a conversion of
your existing data? Yes No

Primary Contact

Name:

Position:

Phone:

Email:

Electronic Trading

Do you require a Sunrise
Exchange connection? Yes No

Do you require a quote to
convert your information
to Sunrise Exchange? Yes No

Are you a member of any of the following groups?

- National Insurance Brokers Association (NIBA)
 Steadfast Insurance Brokers Management Group Ltd
 Council of Queensland Insurance Brokers Inc. (CQIB)
 Underwriting Agencies Council (UAC)

How did you find out about WinBEAT NEXT?

- Associate Insurer Prev. Association
 Internet Other:
Please specify

Return to Ebix by

Email: winbeat@ebix.com.au

Ebix Australia Pty Ltd
winbeat@ebix.com.au
www.ebix.com.au

Sydney
Ground Floor, 754 Pacific Hwy
Chatswood NSW 2067
P: +61 2 8467 3000

Melbourne
Suite 7, 670 Canterbury Rd
Surrey Hills VIC 3127
P: +61 3 9895 2600

Ledger Name:

The Ledger name is limited to 16 characters and cannot contain any spaces, special characters or symbols

General Options

- | | | |
|--------------------------------------|--|---|
| <input type="checkbox"/> Coinsurance | <input type="checkbox"/> Export | <input type="checkbox"/> Account Manager Security |
| <input type="checkbox"/> OrganiseIT | <input type="checkbox"/> OfficeTech DMI | <input type="checkbox"/> OPG |
| <input type="checkbox"/> Steadfast | <input type="checkbox"/> Database Services | |

Banking Options

- | | |
|---|--|
| <input type="checkbox"/> Not Applicable | <input type="checkbox"/> Automated Banking |
| <input type="checkbox"/> MPP | <input type="checkbox"/> NAB Transact |

eLink

- | | | |
|---------------------------------|---------------------------------|----------------------------------|
| <input type="checkbox"/> Policy | <input type="checkbox"/> Client | <input type="checkbox"/> eXpress |
|---------------------------------|---------------------------------|----------------------------------|

EDI Options

- | | | |
|--|---------------------------------------|--------------------------------------|
| <input type="checkbox"/> Sunrise | <input type="checkbox"/> No. Users | |
| <input type="checkbox"/> Sunrise - Quoting | <input type="checkbox"/> Installments | <input type="checkbox"/> SmartOffice |

iClose

- | | | |
|--|--|--|
| <input type="checkbox"/> iClose - Accounting | <input type="checkbox"/> iClose - Policies | <input type="checkbox"/> iClose - Claims |
|--|--|--|

Premium Funding/Background Funding

Available only by application to your participating premium funder. On acceptance, the funder will contact us to activate the option.

Thank you

Thank-you for choosing WinBEAT for your back-office system. For your application status contact the WinBEAT team at [03 9895 2600](tel:0398952600) or free call [1800 807 139](tel:1800807139) outside the Melbourne metro area, or alternatively email winbeat@ebix.com.au. Please allow 5 - 7 working days for processing.

What next?

On receipt of this application, we will prepare the WinBEAT Next Software and Support Agreement. This agreement will be forwarded to you, together with quotations for the once-only WinBEAT NEXT Forms License and WinBEAT NEXT Connection Fee with your initial quarterly subscription. Training options will also be included with this initial kit. The activation of one or more WinBEAT NEXT options may be requested at any time after you have initially registered WinBEAT NEXT.

A note on WinBEAT NEXT User Levels

User Levels may be subsequently increased or decreased on request by a simple phone call. WinBEAT NEXT subscription rates are based on the User Level. The user level is defined as the maximum number of users able to log into a WinBEAT NEXT portfolio at any one time. WinBEAT NEXT subscription rates include one scheduled training course credit for one person per annum.

Return to Ebix by

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