WinBEAT
Application Form

WinBEAT4

Company Details (Primary Location)

Company Name:

Trading as (if Applicable):

ABN:

Company Address(es)

Address:

Postal Address (if different from above):

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

DD | MM | YYYY

Do you require a quotation for a conversion of your existing data?   ☐ 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)

Company Contact Details (Primary)

Phone:

Mobile:

Business Website Address (if applicable):

Type of business

☐ Registered Broker

☐ Authorised Representative

☐ Underwriting Agency

AFS License 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

How did you find out about WinBEAT NEXT?

☐ Associate   ☐ Insurer   ☐ Prev. Association

☐ Internet   ☐ Other: _____
Please specify

Ledger Name:

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

General Options

Coinsurance   ☐ Export   ☐ Account Manager Security

OrganiseIT   ☐ OfficeTech DMI   ☐ OPG

Steadfast   ☐ Database Services

Banking Options

Not Applicable   Automated Banking

MPP   NAB Transact

eLink

Policy   Client   eXpress

EDI Options

Sunrise   No. Users

Sunrise - Quoting   Installments   SmartOffice

iClose

iClose - Accounting   iClose - Policies   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 or free call 1800 807 139 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 Software and Support Agreement. This agreement will be forwarded to you, together with quotations for the once-only WinBEAT Forms License and WinBEAT Connection Fee with your initial quarterly subscription. Training options will also be included with this initial kit. The activation of one or more WinBEAT options may be requested at any time after you have initially installed WinBEAT on your PC or network.

A note on WinBEAT User Levels

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