



WinBEAT4

Information Pack



Everything you need to know about **WinBEAT4**

Solutions for General Insurance Intermediaries

Specially Developed for Small – Medium Business

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Your insurance business...

Are you still doing it the hard way?

Insurance is a service and information based business. Servicing your clients efficiently demands that you analyse and process information quickly in order to provide authoritative and timely advice.

- Is your existing system coping with such demands?
- Is it providing you with the information you need?
- Is it assisting you with your compliance?
- Is it cost-effective?
- Are you able to analyse your Trust Account at a glance?
- Is the support the best available?
- Is it widely used by the market?
- Does it offer a seamless interface to electronic underwriting, on-line quoting, automated banking and premium funder quoting systems?

If you are tied to a system that is inflexible and cumbersome you will not be as efficient and competitive as you should be. If your interface to electronic trading, online quoting and premium funding quotations is not up to date your staff will be wasting valuable time.

Areas such as invoicing, cash receipting and paying Underwriters and GST must be easy to use to ensure your employees are not diverted from other important administrative tasks.

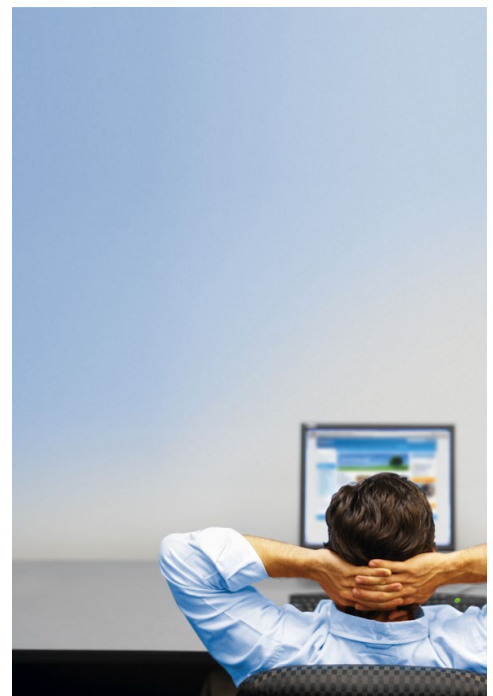
Time is one of your most valuable commodities but unless you use your time to the best advantage, there is a limit to how productive and successful your business can be.

We will transform the way you do business and enhance your future viability.

We not only develop the product, but also provide the organisational expertise to support you and your staff.

WinBEAT provides the solution for businesses like yours at a realistic cost. We have built our reputation as one of the leading general insurance broking software vendors over a period of more than thirty years and have demonstrated our long-term commitment to the industry.

Ebix Australia is committed to the delivery of outstanding customer service. We provide quality, user-friendly products and maintain our commitment to the price sensitive strategy that we have identified as being essential to the development of long-term business relationships



WinBEAT4

What is it?

WinBEAT4 is a scalable Windows-based software program designed specifically for General Insurance Intermediaries. With a history of more than 40 years of experience and development, the product has been designed from the ground up by Australians for the Australian marketplace.

Seamless interfaces for a total solution

WinBEAT offers seamless interfaces to:

- Sunrise Exchange electronic underwriting and Sunrise Online Quoting services
- iClose e-commerce solutions (Policy, Settlements, Custom Web Applications)
- Web-based quoting systems of participating premium funders
- Background Funding with participating funders
- Document Management Systems
- Banking systems
- Ebix Online Payment gateway
- Custom designed web based products

Professional update and support service

The product update and support service keeps your WinBEAT software up to date with regular releases of new enhanced versions. You also have access to our helpdesk with a **1800 free call** for users outside the Melbourne metropolitan area. Users may also contact us by email.

Professional training

We provide training Australia-wide and offer scheduled classroom, customised on-site and web-based training courses from Introductory to Advanced. Professional course material is supplied with all of our courses. All our Trainers hold a Certificate IV in Training and Assessment.



Subscription service

WinBEAT is available via a simple quarterly subscription. There are no huge up-front Licence Fees and no minimum subscription period.

In Australia, there are more General Insurance Brokers and Authorised Representatives using WinBEAT than any other General Insurance system.

- Installed base of around 400 intermediary sites
- Representing over 6,700 individual users

WinBEAT also leads the market in ease of use and value for money.

WinBEAT4

WinBEAT Subscription includes a full Support Agreement

Your software will always be up to date. The subscription includes a full Software Support Agreement. This Agreement includes WinBEAT Software Updates. It also includes a WinBEAT telephone support service during the hours of 8:30am to 5:30pm EST/EDST on every Melbourne business day, with a 1800 free call number for users outside the Melbourne metropolitan area.

No minimum term

You are not locked into any minimum term. You may terminate at any time by simply giving 30 days' notice. Renewal is by invitation each subsequent quarter. Each renewal is issued around 14 days prior to expiry of the subscription period and is payable by the due date. Direct credit and Credit card (Visa and MasterCard) payment options available for your convenience.

Increase or decrease users at any time

A simple email to our helpdesk upgrades or downgrades your WinBEAT user level to the requested number of users at the rates then in effect. The next quarterly Fee will be adjusted accordingly. Gives you better control over costs.

Only pay for what you use

You only pay for the WinBEAT options that you use such as additional Ledgers, Sunrise Exchange Expert or Sunrise Online Quoting and the WinBEAT Export, Co-insurance, Overseas Underwriting, Automated Banking or Document Management Interface options.

WinBEAT rates scaled to user level

Start from single user with WinBEAT installed on a single standalone PC and upgrade WinBEAT to multi-user networking. Easy single step subscription upgrades from 2 to 250+ users. Enables your WinBEAT user numbers to be expanded as your business grows. This gives you flexibility without commitment.

WinBEAT4 & Sunrise Exchange

Sunrise Exchange

WinBEAT incorporates an optional interface to Sunrise Exchange, a full cycle electronic trading facility, owned and managed by Ebix.

Around 380 of our WinBEAT customer sites, representing some 2,500 individual Sunrise Exchange users, are currently connected to this service.

The Sunrise Exchange platform allows insurance intermediaries and underwriters to transact together, securely in real time, with a vast range of insurance products and services.

Sunrise Exchange has been designed to streamline all of the transactions across the underwriters you work with.

Connection to Sunrise Exchange is based on the total number of concurrent users.

Connected

Sunrise Exchange is the industry platform that connects intermediaries' systems with insurance underwriting applications.

It allows insurance professionals to process quotes, submit and respond to new business, make enquiries, endorse and renew policies, complete cancellations and lapses across home, motor, commercial, trade and most other general insurance products.

Productive

Sunrise Exchange reduces administrative processes through systems integration from insurer to intermediary. Freeing up staff allows them to be redeployed in more productive roles, potentially generating more revenue and improving customer service in your business.

Cost Effective

By doing business via Sunrise Exchange, intermediaries and underwriters achieve significant transaction processing cost reductions. The information is processed once and updated to both the insurer and the intermediary's back office systems, eliminating multiple handling and reducing possible data entry errors.

Automated

Automatic management of renewals and significantly faster turnaround times on policies helps you to process more business, more efficiently.



WinBEAT4 & Sunrise Online Quoting

Sunrise Online Quoting

Sunrise has a real-time, complete feature and rates comparison tool in the market that allows you to acquire and compare home, contents or motor quotations from leading Australian insurers. Online Quoting leverages Sunrise Exchange, to provide business process efficiencies, reduce operational costs and increase staff productivity.

Easy-to-use

Simply complete a single set of questions within Online Quoting to obtain multiple quotes and compare policy feature and benefits. Online Quoting provides business process efficiencies, reduces operational costs and increases staff productivity.

Immediate

Online Quoting returns an instant set of quotes according to your customer's requirements and allows you convert an enquiry to a sale directly, whether they're on the phone or with you in person.

Comparative

Online Quoting offers an unbiased view of the options available and equips you with comprehensive information to guide your customer towards the most appropriate policy for their needs.

Accurate

The immediate nature of Online Quoting guarantees the most current rates and features every time. Online Quoting helps you avoid price quotation errors and the inconvenience of re-clarifying details at a later stage. Quotes are saved and can be accessed for up to 18 months.

Integrated

On acceptance of quotations, Online Quoting integrates directly to broking systems, therefore you avoid re-keying data each time, saving time and effort.

Standardised

We use industry accepted sources, such as Glass's Guide, Red Book and policycomparison.com, so you get the most accurate and up-to-date features and pricing.



WinBEAT4 & Sunrise Templates

Sunrise Templates

Your employees can waste considerable time and effort re-formatting policy coverage information to create professional looking and printer friendly documents. All in all, this process is inefficient, costly and creates professional indemnity exposure for your business.

Sunrise Templates convert unformatted text into uniform, well presented intermediary invoice schedules. The Sunrise Templates solution also formats text received from insurers and processes it into your broking system and onto the invoices you issue to clients.

Enhance productivity

By using our Standard Templates, you can improve productivity by re-deploying time elsewhere. Any changes insurers make to their products are automatically updated by Sunrise Exchange within the Templates. Therefore you benefit from all of the improvements at no additional charge.

Maintain consistency

Standard Templates provide uniformity across all insurer products. This eliminates the need for your employees to re-key insurer schedules into a format for your business and means they become familiar with a similar look and feel regardless of the product, or of your employees' specialty area.

Improve accuracy

You can be confident that the documents you are presenting to your clients are accurate from the start. Whether you're emailing, printing, or storing them for future use.

Streamline integration

Our Standard Templates complement your broking system templates. They take the details passed by Sunrise Exchange and relevant information gathered from within your system to create professional looking documents.

Reduce risk

By reducing manual intervention, you decrease your company's exposure to Professional Indemnity claims and client confusion. With this you gain peace of mind that the data within your systems and invoices is accurate and compliant.

Customise Templates

If our Standard Templates do not meet your company requirements we can customise the Templates to your needs.

Minimize your input and maximise your outcomes with Sunrise Templates.

WinBEAT4 & Ebix iClose

iClose Framework

WinBEAT incorporates an optional interface to the Ebix range of products.

Based on a peer to peer messaging architecture, iClose incorporates a series of modules and interfaces that can be implemented individually or in any combination to fill gaps in the e-Commerce arena.

It provides a secure, cost effective e-Commerce platform that complements existing market facilities such as Sunrise Exchange and Sunrise Online Quoting.

iClose is a comprehensive e-commerce strategy incorporating standards, software products, interfaces and services designed to address all aspects of the broker-insurer relationship. It addresses a range of business processes and provides a complete solution for functions including quotations, referrals, placements, settlements and claims.

The following iClose interfaces are currently available in WinBEAT.

iClose Policy

A direct style of e-commerce interface similar to Sunrise Exchange but designed to use the ACORD Messaging approach as an alternative to a VPN connection. It is ideally suited to niche business.

The Product Matrix on the following page outlines the Underwriter and Underwriting Agency products available within the iClose policy framework.

iClose Placements

Designed to simplify the quote and bind phases for negotiated risk classes, iClose Placements is a flexible facility that complements existing Ebix quotation facilities available through Sunrise Exchange or Online Quoting.

Fully integrated with all Ebix broking systems, a broker initiates a quote request which passes workflow control to iClose Placements, then using an agreed question set, the broker is able to submit the required risk details to multiple insurers, and monitor and manage quote responses.

iClose Settlements

Most accounting functions between brokers and insurers rely on inefficient manual processes with associated back-office duplication and potential for errors. Providing a more efficient solution iClose Accounting automates and streamlines traditional manual processes.

The Settlement process is the first accounting function to be automated. Settlement workflow is simplified for the broker, iClose Accounting automatically produces settlement (remittance) files in XML format as part of the Underwriter Payments process. These settlement files are forwarded via a secure connection to the Underwriter's system.

The broker then pays the underwriter by Electronic Funds Transfer. This EFT payment triggers the upload of the settlement file into the Underwriter's system and matches policies with payments.

Sunrise & iClose Policy Product Matrix

Risk classes available through **Sunrise Exchange** and **iClose Policy**



	AIG	Allianz	att	axis	CGU	CHUBB	coverlink	gard	Hollard	NTD	QBE	360	TIO	vero	ZURICH
Business Pack	■				■				■				■		■
Commercial Motor					■						■			■	
Commercial Pack															■
Contract Works											■				
Corporate Travel	■														
Farm Motor					■										
Farm Pack					■						■				
Heavy Motor										■	■				
Home		■			■						■			■	
Information Communication					■						■				
Landlords		■			■								■	■	
Management Liability					■		■	■							
Marine Cargo	■	■								■					■
Marine Carriers		■	■							■					
Medical Malpractice											■				
Motor		■			■						■			■	
Motor Trades		■												■	
Office Pack		■			■									■	
Personal Accident											■				
Pleasure Craft		■			■						■				
Professional Indemnity	■	■			■						■				
Strata					■										
Taxi and Hire Car			■												
Trades Pack		■												■	
Workers Compensation		■			■		■				■				■

Our Business Partners

Premium Funding Partners

Ebix Australia Pty Ltd together with its premium funding interface partner Red Planet Software, created the first interface standard defining the way premium funders' quoting systems interface to general insurance intermediary software.

This standard was released to the market in June 2003.

The interface provides a facility for WinBEAT users to select one or more invoices to be funded in WinBEAT, and then automatically transfers the details to a selected funder's quoting system for a premium funding quotation in a seamless interface.

Brokers will need to contact their funder to apply for a connection.

Background Funding

The WinBEAT4 Background Funding Module is designed to streamline the production of Premium Funding quotations for your customers.

Background funding allows an invoice or statement to be automatically funded in the background. Funding 'instalments' will be printed on the invoice with a link to the funder's web site for completion of the funding contract and direct debit details.



Our Business Partners

Banking Solutions: Macquarie Premium Payments

Created in partnerships with Macquarie, Macquarie Premium Payments (MPP) offers a comprehensive and fully integrated banking solution. MPP is designed to streamline and automate the invoicing, receipting and bank reconciliation processes within your business. It is designed to provide significant back office efficiencies by eliminating current manual processes, freeing up staff, cutting costs, reducing risk, eradicating errors and providing your clients with a wider range of payment options.



The module integrates with facilities already available through Macquarie's online banking platform, Active Banking, to provide a comprehensive banking solution.

Incoming Receipts/Payments

Receipts are managed by Macquarie's innovative DEFT Payment Systems. Client relationships are improved by allowing you to offer a wider range of payment to your clients.

You choose which payment methods you wish to offer. WinBEAT produces an invoice with a special remittance advice so that premium collection and receipts processing is fully automated via the DEFT Payment Systems.

Payments are made to a central Macquarie facility and a daily banking transaction file and deposit file are available to automatically update WinBEAT. This negates the need for manual receipting and frees office staff from the time-consuming task of processing and reconciling receipts and payments.

Please turn over for further payment methods and instructions

IB PAY

Biller Code: 95682
Ref: 40002881913634

To pay on-line with your credit card (card types here) visit www.abcinsurance.com.au
Client Ref: 0119X Invoice Ref: 11632
Call 1300 78 11 45. A surcharge may apply.
DEFT Reference Number: 40002881913634

eft

Acct Name: ABC Insurance Brokers Trust Account
BSB: 182222 Account: 282046366
Lodgement Reference: 8191363
Please note: Lodgement Reference is required

POST billpay

*498 400028 00081913634
+400028 81913634 <

For payments by cheque see reverse.

ABC Insurance Brokers Pty Ltd
Our Reference: DIMENSIONS
Invoice No: 11632
Due Date: 4/04/2017

Premium	\$1,923.00
U'writer Levy	\$0.00
Fire levy	\$0.00
GST	\$197.32
Stamp Duty	\$211.53
Broker Fee	\$50.15

AMOUNT DUE
\$2,382.00

000238200<3+

Sample Invoice Remittance for Macquarie Premium Payments

Invoice Payment Method Options

- BPay
- Credit Card via Internet
- Credit card via Phone
- Credit Card via your Ebix Online Payment Gateway
- Australia Post pay in store by cheque or EFTPOS
- EFT
- Cheque

External Payments

Offering greater efficiencies and flexibility for payments, WinBEAT will create a banking file to be sent to Macquarie Bank to disburse multiple payments via a single file. Payments can include:

- Insurer Settlements
- Sub Agent Settlements
- Third Party Broker Settlements
- Client Refunds and other Payments
- Sundry Creditors Payments

Security and authorisation controls are implemented to ensure the integrity of all payments.

Reconciliation

Completing the financial loop is the option to automate bank reconciliations.

The elimination of tedious repetitive tasks through automatic bank reconciliation frees up countless hours spent doing it manually.

Since the MPP module handles most aspects of receipting and payments, it also ensure that balances, receipts and payments are aligned between your Ebix system and the bank's records.

Further Details

To discuss Macquarie Premium Payments contact **Macquarie Bank**

Our Business Partners

Banking Solutions: NAB Transact

Created in partnership with NAB, WinBEAT offers the NAB Transact banking module, a fully integrated banking solution option. This solution streamlines and automates the invoicing and receipting within your business. NAB Transact is designed to provide significant back office efficiencies by eliminating current manual processes, freeing up staff, cutting costs, reducing risk, eradicating errors and providing your clients with a wider range of payment options.



NAB TRANSACT

The module integrates with facilities already available through the NAB Transact and Connect banking platforms to provide a comprehensive banking solution.

Incoming Receipts/Payments

Receipts are managed by NAB Transact, allowing you to offer a wider range of payment to your clients. You choose which payment methods you wish to offer.

WinBEAT produces an invoice with a special remittance advice so that premium collection and receipts processing is fully automated via NAB Transact.

In addition to conventional payment methods, the NAB Transact module is the first integrated banking system to offer a solution for clients paying by EFT.

Payments are made to NAB and a daily banking transaction file and deposit file are available to automatically update WinBEAT. This negates the need for manual receipting and frees office staff from the time-consuming task of processing and reconciling receipts and payments.

	Bill Code: 95682 Ref: 0130000111990 Telephone & Internet Banking - B _{PAY} SM Contact your bank or financial institution to make this payment from your cheque, savings, debit, credit card or transaction account. More info: www.bpay.com.au	Our Reference: WILSO E Invoice No: 12387 Acct Man: W Walter	
	Acct Name: ABC Insurance Brokers Trust Account BSB: 083123 Account: 333456900 Reference: WILSO E 12387		
	Mail this portion with your cheque payable to: Walter Insurance Brokers 300 Barrack Street PERTH WA 6000		
	To pay with your Mastercard, Visa or AMEX Call 1800 807 139 Visit www.aboinsurance.com.au Client Ref: 011X Invoice Ref: 12387		
<table border="1"> <tr> <td>AMOUNT DUE</td> <td>\$4,639.47</td> </tr> </table>		AMOUNT DUE	\$4,639.47
AMOUNT DUE	\$4,639.47		

Sample Invoice Remittance for NAB Transact

Invoice Payment Method Options

- BPay
- Credit Card via Internet
- Credit card via Phone
- Credit Card via your Ebix Online Payment Gateway
- Australia Post pay in store by cheque or EFTPOS
- EFT
- Cheque

External Payments

Offering greater efficiencies and flexibility for payments, WinBEAT will create a .ABA banking file. The file is simply uploaded to NAB Connect and all payments are automatically transacted overnight. Payments can include:

- Insurer Settlements
- Sub Agent Settlements
- Third Party Broker Settlements
- Client Refunds and other Payments
- Sundry Creditors Payments

Security and authorisation controls are implemented to ensure the integrity of all payments.

Further Details

To discuss NAB Transact contact your **NAB Account Executive**

Our Business Partners

Banking Solutions: Online Payment Gateway

The Ebix Online Payment Gateway (OPG) offers another convenient and cost effective payments solution by allowing your clients pay by credit card via your own website.

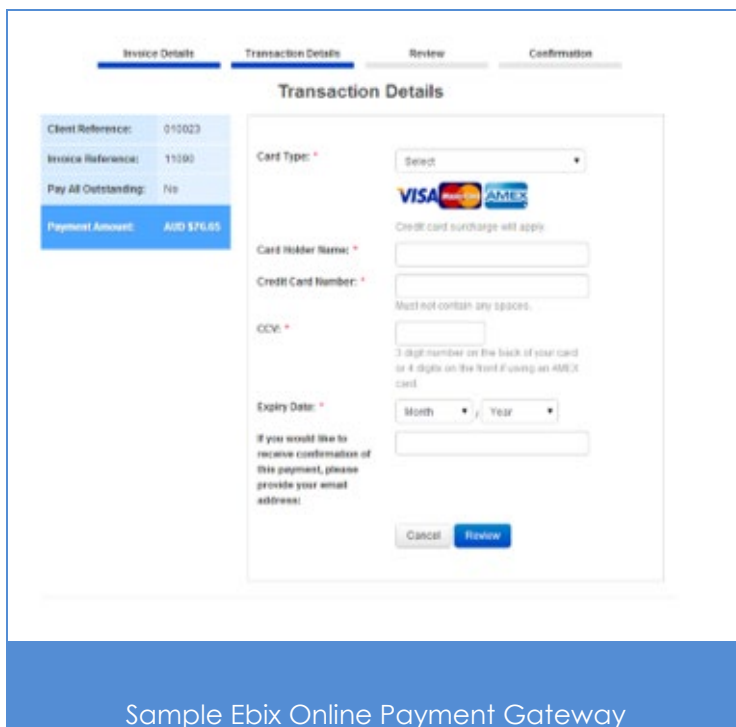
How it works

Your customer will access a "Payments" page on your web site and enter the client and invoice references that are printed on their invoice.

They then enter credit card details for payment of the invoice or statement amount, the payment is processed by the payment gateway service provider and a file is sent to you to upload into your WinBEAT broking system to receipt those policies paid via the payment gateway.

- We customise the Payments page to suit your own website
- You select the Payment Gateway Service Provider
- You select the credit cards you wish to allow - VISA, Mastercard, American Express and/or Diners Club
- You specify the % of the merchant fee to be charged for each card type

There are a number of technical requirements for setting up the WinBEAT OPG. For more detailed information contact winbeat@ebix.com.au.



Supported Systems:

- ANZ eGate
- CBA via Securepay | BPoint
- Macquarie Bank
- NAB via NAB Transact
- SecurePay
- St George via PayWay
- Westpac via PayWay

Our Business Partners

Document Management Software

We believe that our customers should be able to choose a document management solution that best suits their individual requirements.

WinBEAT incorporates a basic linking of documents and other client files to a fixed folder structure via the 'Documents' button. There are however numerous Document Management Software suppliers in the market who offer a more sophisticated and innovative solution to the scanning, filing, retrieving and viewing of your documentation in an orderly fashion.

The following Document Management Software suppliers have developed a DMI to WinBEAT:



The office solution that gets you organised. No more mountains of paperwork, no more searching through filing cabinets and no more continually waiting for documents. All your data is stored in one database. Information literally at your fingertips – saving you time and money.

organiseit is a software application designed to provide an easy to use solution for the management of your office filing system.



technosoft solutions. <https://www.technosoftsolutions.com.au>
soft solutions to hard problems

Technosoft Solutions specialise in software and consultancy services for Electronic Document Management systems. We have the expertise and solutions that aim to achieve the less paper office environment.

The OfficeTech2 Document Management System, our flagship product, is the global office solution that streamlines office communications and the storage of diverse documents that are produced every day in the office environment.

Pricing Schedule

Standard

All prices exclude GST

Connection Fee

POA

Applies to the initial establishment or subsequent re-instatement of the service.

Forms Module

POA

Once-only Licence Fee payable with your initial WinBEAT subscription.

Pre-designed special forms including Invoices, Schedules, Closings, Statements, Bank Deposit, Underwriter Remittance, Final Notice, Quote Slip, Claims Advice, Claims Notification, Cover Note Request, Receipts, Schedule of Insurances and Certificate of Insurance. Invoice printing includes options for standard or Credit Card remittance as well as basic notice of disclosure and IBD wording, (or you may elect not to print this wording where you have your own wordings pre-printed on the reverse side of the invoice). Provision for logo included on forms where appropriate.

Base Subscription Rates

The *WinBEAT* subscription rates depend on the number of users you need. Rates are scaled at individual user level. The base fees, payable quarterly in advance, are as follows:

Rates are based on the maximum number of users to be connected at the same time **to the primary** portfolio (or database).

Rates explicitly exclude remote site support, (support to staff at locations other than the primary address shown on the agreement).

Each additional portfolio or database, if there is more than one, attracts a fee and requires separate registration for the maximum users connected simultaneously to that database. Discounted rates (50% of base fee) apply **for each additional portfolio or database**. Where there are multiple portfolios or databases, the portfolio with the largest number of users is the primary portfolio.

The WinBEAT subscription is payable **quarterly in advance**. It includes Helpdesk support, product update service and a scheduled training course for one person per annum. (Training credits do not apply to additional portfolios).

Rates specifically exclude any on-site or non-scheduled training services. You may move up or down from any user level and the rate will be adjusted accordingly. You may cancel at any time **after the initial quarter** by giving 30 days notice.

WinBEAT Pricing Schedule

Options —Interfaces

Sunrise Online Quoting Interface

POA

Sunrise Online Quoting enables intermediaries to receive real-time home and motor quotes, with features and benefits, from multiple Insurers without re-keying information.

Contact Sunrise at support@ebix.com.au for further information about Sunrise Exchange and Sunrise Online Quoting. Pricing is based on number of users subscribing to the interface.

Sunrise Templates

POA

Each individual template is \$15 per quarter. Costs are scaled for 7+ templates

Premium Funding Interface

No additional fee

The WinBEAT Premium Funding Interface enables you to nominate a client, and select one or more invoices for a funding quotation. This information is then transferred automatically into the premium funder's quoting software, and a quotation can be produced in a matter of seconds.

The premium funding interface is only available by application to your participating premium funder. On acceptance, the funder will contact us to activate the option.

Red Planet Software Intermediary Funding Interface

POA

For intermediary customers using the Red Planet Premium Funding Software www.redplanetsoftware.com.

QBE Claimwrite Interface

No additional fee

The WinBEAT interface with QBE Claimwrite is designed to enhance and simplify your claims handling processes.

Using QBE's c.ch@nge direct connectivity you will have direct access to QBE claimwrite and can automatically update claim details between WinBEAT & QBE.

Brokers must apply to QBE for access to this interface

WinBEAT Export Interface

POA

Allows you to export single or multiple policy details and merge the client and policy details into a Microsoft Word template.

Automated Banking Interface

POA

Incorporates the ability create outgoing data files to advise your bank to make payments from your trust account (ABA files) and optionally to accept incoming bank files for BPay transactions to your trust account.

Restricts a nominated user/s access to clients for selected account manager/s. For example for authorised reps with their own client base.

Document Management Interface (DMI)

POA

Enables WinBEAT to interface with 3rd party Document Management Software for the participating DMS vendors. Connects the WinBEAT Client directly to the Document Management System using the Client Code.

WinBEAT Online Payment Gateway (OPG)

\$350 / quarter

The Ebix OPG gives you the opportunity to let your clients pay by credit card via your own web site.

Your customers will access a "Payments" page on your web site and enter the client and invoice details that are printed on their invoice. The OPG will interrogate your WinBEAT database to extract the balance owing for this invoice and display this outstanding balance on the payment page. Your client enters their credit card details for payment of the invoice or statement amount, the payment is processed by the payment gateway service provider and a file is sent to you to upload into your broking system to receipt those policies.

Coinsurance and Overseas Underwriting

+15% to base fee

Provides for multiple insurers for the one risk and for overseas underwriting including the automated calculation of overseas tax and remittance of government rates and levies

WinBEAT eLink Interface

POA

Import external client and policy data in XML format into WinBEAT.

Specific purpose external applications such as web sites can now be used to record client and policy information which is passed to the WinBEAT transaction engine and processed as if the transaction had been entered via a conventional WinBEAT data entry screen. eLink performs transaction validations, creates accounting records and updates the database.

Front end applications can include iClose Custom Web Applications, external web sites, HTML pages created on your intranet or third party in-house developed applications.

Ebix can also assist with development of your front-end application using our iClose Custom Web Application toolset.

WinBEAT SmartOffice Integration

POA

SmartOffice is a cloud-based Customer Relationship Management (CRM) application that offers easy-to-use solutions to address the challenges of relationship management and client service to help you build and maintain profitable relationships with your clients.

WinBEAT4 integrates with SmartOffice at both the client and policy level. You can upload your entire WinBEAT client database and optionally upload their policies, then use all of the marketing, prospecting and client management tools that SmartOffice provides.

WinBEAT Database Services

POA

Merge one or more Underwriters, Account Managers, Sub-intermediaries, Client Groups or Policy Classes. The Database Services programs have been written to allow you to 'clean-up' your database by deleting old and unused Underwriters, Policy Classes, Sub Intermediaries, Account Managers and Client Groups and merging them into other Underwriters, Policy Classes, Sub Intermediaries, Account Managers and Client Groups.

WinBEAT Ledger Services

Ledger Merge

POA

Merge 2 or more WinBEAT Ledgers to form a new ledger.

Ledger Split

POA

Split clients and policies for one or more account managers from the existing portfolio to create two separate portfolios.

Ledger Copy and Clear

POA

Copy and Clear Client, policy and accounting information. Keep Classes, Underwriters, WinBEAT Forms and other set up information.

WinBEAT Sunrise Executive Conversion

POA

Convert Sunrise Executive policies into a WinBEAT database. Standard classes and Sunrise products are set up however no balances or schedule data can be converted.

Data Conversion

POA

Convert data from any existing Broking System or CRM into WinBEAT Clients and/or policies.

Training Options

Overview

An understanding of the WinBEAT basics and elementary business rules is essential.

The WinBEAT rates include 1 free scheduled training course for one person per annum.

There are many options available in your WinBEAT registration. As each business has unique requirements, utilising the options to your best possible advantage is an important factor determining successful implementation of the system.

Important: WinBEAT training is mandatory. Only users holding a current WinBEAT training certificate have access to our WinBEAT support services. A database of trained users is maintained by our support personnel.

Our Support policy is outlined on our website – please click the link to view [Support policy](#)

Web-based via Webex

Instructor driven interactive online training, demonstrations, meetings or presentations in real time from different locations.

The host and attendees will enjoy highly dynamic and flexible e-learning whilst sharing their desktops, applications and documents.

Consulting

Ebix offers consulting with one of our professional staff who has extensive knowledge both of WinBEAT and the insurance industry.

Consulting is beneficial if you have specific requirements and do not want a structured training course.

Scheduled Group Courses

Group training sessions (usually 6 to 10 participants at a time) are conducted regularly in each state.

On-Site

On-site training is available at the rates then in effect. Travelling and accommodation costs apply.

Group training and On-site sessions are subject to COVID:19 regulations.

For an obligation-free quote contact:

Tonia Colliver
Training Manager
wbtraining@ebix.com.au

The Next Steps...

- 1 Complete the online WinBEAT Application Form
- 2 Upon receipt of your application, we will prepare your Software and Support Agreement, together with quotations for the once-only setup fees, training options and the initial quarterly subscription.
- 3 Upon receipt of the signed Agreement and initial fees, we will immediately forward the software and installation instructions to your office.

You have access to our telephone support and technical support services to assist you to install the software. This service is included with your WinBEAT subscription.

- 4 A training package must be arranged at this time.

If training at a scheduled course is not practical, an on-site or web-based training course must be arranged to familiarise you with the WinBEAT product (See training options on the previous page).

It is important to note that the support line does not cover product training.

Telephone and email support services are available only to those users who have completed a formal WinBEAT training course or received on-site training by Ebix staff.

- 5 Product updates are advised via email and can be downloaded by your WinBEAT System Administrator at a time convenient to them.

Major upgrades are supplied on CD. All Updates are included as part of your WinBEAT subscription and are automatically forwarded to you while you subscribe to WinBEAT.

- 6 WinBEAT renewal invitations are issued each subsequent quarter approximately 14 days prior to expiry.

Upon receipt and clearance of your subscription payment, we email the updated registration for the following quarter.

For a live demo via WebEx, further information or any queries contact:
WinBEAT Support

- 03 9895 2600 (Melbourne)
- 1800 807 139 (outside Melbourne metro area)
- winbeat@ebix.com.au