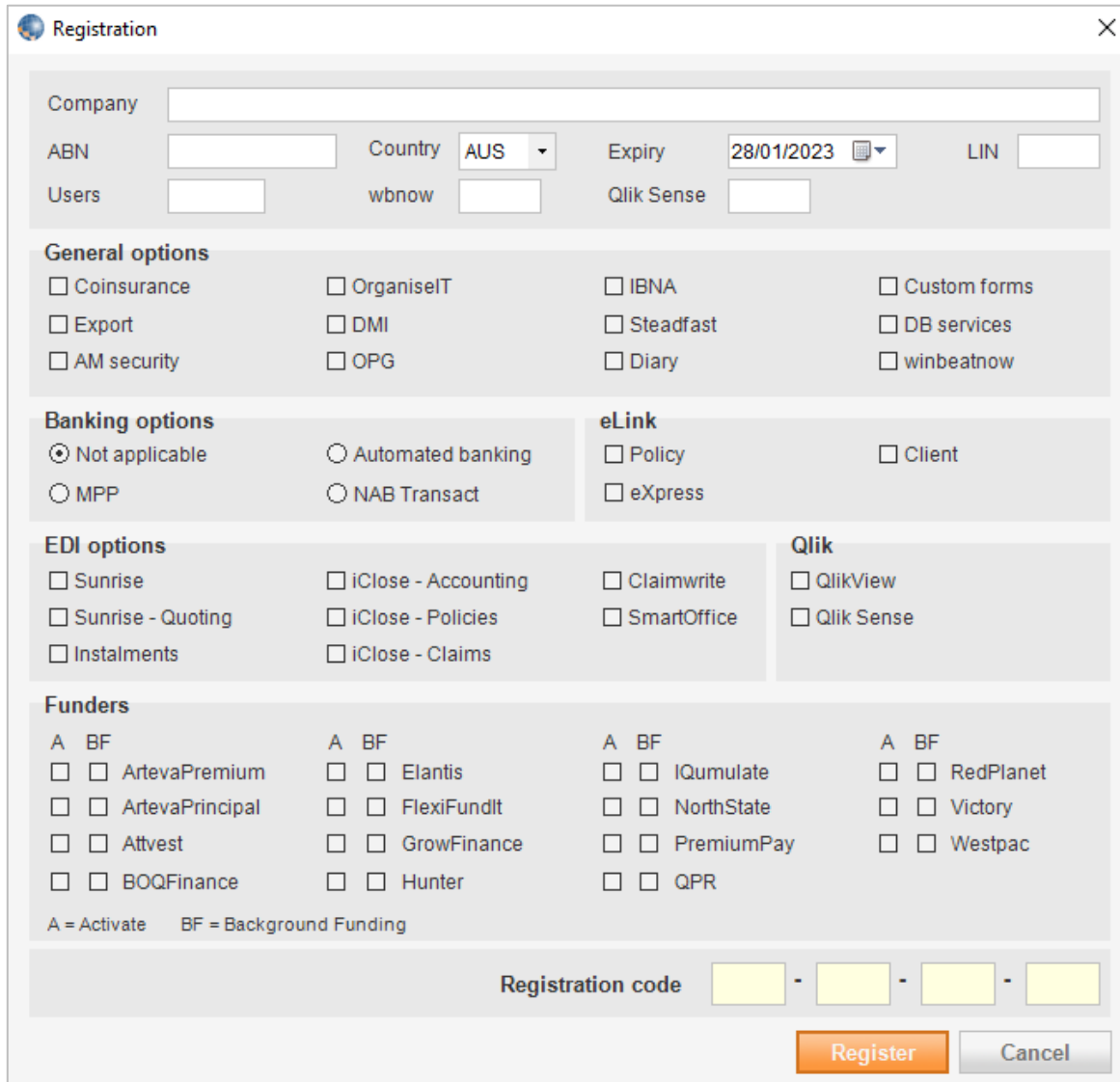# WinBEAT4 Registration Options

You may have noticed a number of WinBEAT Registration Options on your WinBEAT Subscription Invoice and Registration forms.

This guide provides a brief outline of these subscription options, including their costs.

All prices are exclusive of GST

Once you request activation of any of our optional modules, you will be supplied with a new registration including the option and the appropriate user guide/s.

The cost, where applicable, will be added to your next WinBEAT renewal. This gives you an opportunity to 'try before you buy' as any module may be deactivated prior to the renewal if not required.

Please email winbeat@ebix.com.au for further information on any of these registration options or to request activation.

Coinsurance and Overseas Underwriting add 15% to base fee

Coinsurance Underwriting is when a policy for a client is placed with more than one Underwriter, thus sharing the risk. Within WinBEAT you are required to create an Underwriter Account for each Underwriter with which you are placing business.

Overseas Underwriting is where a policy for a client is placed with an Overseas Underwriter and you may be required to pay tax on the premium to the Australian Government. Therefore, within WinBEAT you are required to create an Underwriter Account for the Overseas Underwriter plus Dummy Underwriter Account for the Overseas Tax, GST, Fire Service Levy and Stamp Duty (for each relevant state).

Export add 3% to base fee

WinBEAT Export has been designed to allow you to 'export' client account details, invoice details, claim details and merge these fields onto either a Microsoft Word template or your own email templates in WinBEAT.

WinBEAT Export was developed to assist with compliance and other documentation. The WinBEAT Export facility provides a flexible tool to allow you to design your own compliance documentation, standard letters and claims documents.

Account Manager Security add 3% to base fee

The Account Manager Security Model has been designed to limit the access of a nominated WinBEAT User to client and policy information for specified Account Manager or Managers only.

Account Manager Security does not replace existing WinBEAT security, but works as a filter to limit the user's access. Users who have Account Manager Security activated will only have access to those clients who are associated with their assigned Account Managers. Account Manager Security will apply to all menu options and functions in WinBEAT therefore only allowing access to the specified Account Manager client and invoice details assigned to the user. For example; Reports, Receipts etc. will only display the relevant clients and invoices.

OrganiseIT add 3% to base fee

WinBEAT can automatically link with the OrganiseIT Document Management System.

WinBEAT - OrganiseIT users can activate the link simply by registering the option via WinBEAT. Once the Registration option has been activated, the Documents button on the WinBEAT Client Account will automatically link to the same Client Account within the OrganiseIT database.

Document Management Interface (DMI) add 3% to base fee

Ebix business solutions currently provide the ability to attach documents. However, there is an increasing need to provide more flexible solutions. We believe that an Ebix client should be able to choose a DMS (Document Management System) that best suits their individual requirements.

The purpose of the Ebix DMI is to provide suppliers of document management software solutions with a standard mechanism to interface their software to Ebix software solutions.

Access to information in a DMS will be provided at functional level, allowing a broker to view all documents in the DMS at a macro Client level, or at a micro level individually to select documents relating only to a specific policy or claim. The DMI additionally caters for documents related to third parties that a broker deals with such as Underwriters and Associates.

Online Payment Gateway (OPG)   cost available on request

The Ebix Online Payment Gateway (OPG) gives you the opportunity to let your clients pay by credit card via your own web site. Your customer will access a "Payments" page on your web site and enter the client and invoice details that are printed on their invoice.

The Payment Gateway will access your WinBEAT database to extract the balance owing for this invoice and display this outstanding balance on the payment page. Your client may 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 daily to upload into your broking system to receipt those policies paid via the payment gateway.

IBNA   no additional fee

In order to allow the National office to build a data base of member premium flows at a macro level IBNA have designed the "IBNA Premium Consolidation Report". The intention of the report is to give IBNA as a group some meaningful information with which to negotiate with underwriters, especially when looking to develop specific products.

The process allows member information to be imported and matched to a common set of premium and underwriter codes.

Steadfast   no additional fee

The Board of Steadfast Group Limited commissioned the development of the Steadfast Report to assist in providing statistical input to the Board for the Group's Strategic Planning Process.

The results of the report will assist the Board in determining the specific risk areas where Steadfast is performing well and where additional products or services may be necessary from their Strategic Partners to increase the penetration of certain markets.

The results of all Members' reports will be consolidated into a summary report for management analysis. The individual member reports you supply to Steadfast will not be disclosed to any other members or third parties.

Diary   no additional fee

The WinBEAT Diary module was developed to provide an automated task and reminder system to assist with day to day processing and follow up of your normal insurance activities.

The WinBEAT Diary module allows users to optionally automate follow up reminders for Renewals and New Business, Quotes, Claims, part receipted items and compliance requirements, as well as to add diary entries for Tasks, Appointments and Events. These settings are global across the database. Users may also set up pre-defined diary items for such things as meetings and reviews and other business activities. The Diary includes a Calendar view and an Item view that allows filtering on All, Client, Policy or Claim entries. Users can add both public and private entries into their diary.

Database (DB) Services   cost based on users

Database Services allows merging of one or more Underwriters, Account Managers, Associates, 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, Associates, Account Managers and Client Groups and merging them into other Underwriters, Policy Classes, Associates, Account Managers and Client Groups.

The cost for Database Services is based on the number of registered WinBEAT users in your ledger. It is a once-only charge and can then be used as many times or often as required.

Automated Banking   add 3% to base fee

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

If you are not using BPay you may still utilise this module to create and upload .ABA files for automated processing of Underwriter, Associate, Client and Funder payments.

You should discuss automated banking options with your bank before activating this module in WinBEAT as each bank will provide different automated banking facilities.

Macquarie Premium Payments (MPP)   cost based on users

Macquarie Bank and Ebix have developed the Macquarie Premium Payments (MPP) module which is designed to automate the receipting, payments and bank reconciliation process within a broker's office.

The facilities included in the MPP module are designed to provide significant back office efficiencies by eliminating current manual processes and eradicating errors.

Based on three-tier architecture, the module handles:

- incoming receipts
- outbound payments
- automated bank reconciliation.

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

The MPP quarterly subscription is based on the WinBEAT user level at the time of billing.

NAB Transact   cost based on users

NAB Transact Receivables Management allows you to accept and process payments from your clients using a variety of channels including:

- 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

WinBEAT incorporates a NAB Transact module that allows you to accept some or all of the above payment types and prints the required payment options on your WinBEAT Invoice, Statement and Final Notice.

You can also utilise the NAB Transact module to create and upload .ABA files for automated processing of Underwriter, Associate, Client and Funder payments via the NAB Connect facility.

The NAB Transact quarterly subscription is based on the WinBEAT user level at the time of billing.

eLink   cost available on request

Creating new opportunities within WinBEAT for support of eCommerce, web applications and legacy systems, eLink is a powerful, flexible XML based integration tool from Ebix.

eLink allows you to decide the most appropriate approach to data entry and opens up unlimited support for eCommerce applications. Using the power of XML and standard web development tools, it is possible to build an eCommerce framework in a fraction of the time required by conventional methods.

In simple terms, your company may offer insurance for particular schemes, customers wishing to insurer under the scheme may complete a quote form, via your website then confirm/accept. This information is then uploaded as an eLink file into WinBEAT, creating the client account automatically and a new business policy.

eLink eXpress is an interface that allows you to update your WinBEAT Client data using external source data.

Sunrise Exchange   cost based on users/seats

EDI Sunrise offers insurers and intermediary partners the competitive advantage of a direct connection that enables real time transaction processing over a broad range of insurance products.

The cost does not relate to your WinBEAT User Level, but to the Sunrise Exchange user level you subscribe to with Ebix Exchange.

Online Quoting   no additional fee

Sunrise Exchange Online Quoting provides intermediaries with the ability to receive real-time home and motor quotes from participating insurers. Information entered via a single screen questions set, provides intermediaries with comparative prices, product features and benefits.

Contact Sunrise Exchange at support@ebix.com.au for further information about Sunrise Exchange and Sunrise Online Quoting.

Instalments - Instalment Billing   add 3% to base fee

Instalments allows a client to pay their QBE or CGU premium as monthly instalments or as one annual instalment, directly to QBE or CGU. The Instalments module is only available for QBE or CGU policies processed via the Sunrise Exchange interface. Activation of the Instalments registration option can only be authorised by QBE or CGU.

Policies processed prior to activation of the Instalments registration option in WinBEAT will not record instalment information.

iClose   no additional fee

iClose is an Ebix innovation providing a seamless interface for the exchange of Policy and Claim transactions between an Ebix broker software product and an Insurer or Underwriting agency.

The interface allows the broker, as the source of the insurance transaction, to push the transaction through to the third party, or for the third party to push the transaction through to the Ebix broker software product.

iClose is an open standard for interfacing between an insurer and insurance broker applications. In effect, the standard allows the insurer's application to be treated as a "plug-in" to the broker's in-house system.

Claimwrite   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 to WinBEAT.

Available only by application to QBE.

Smartoffice   no additional fee

SmartOffice is 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.

WinBEAT integrates with SmartOffice at the client level. You may upload your entire WinBEAT client database and use all of the marketing, prospecting and client management tools that SmartOffice provides.

Premium Funding   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 may be produced in a matter of seconds.

Available only by application to your participating premium funder.

Once your application has been accepted, the funder will contact us to to request the activation on your WinBEAT Registration.

The following Premium Funders currently participate in the Ebix Premium Funding Interface:

- Arteva Premium
- Arteva Principal
- Attvest
- BOQ Finance
- Elantis
- Flexi Fundit
- Grow Finance
- Hunter
- IQumulate
- North State
- Premium Pay
- QPR
- Red Planet
- Victory

Background Funding   no additional fee

The 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, via the WinBEAT Premium Funding Interface, without the user going to the funder web site.

Funding 'instalments' will be printed on the invoice with a link to the funder's web site for "**acceptance and completion**" of the funding contract and the direct debit details.

Your client may click on the URL to complete the form to premium fund their premium, or if funding is not required, your clients may select to pay the invoice direct to you in the normal way.

The following funders currently offer Background Funding:

- Arteva Premium
- Arteva Principal
- Attvest
- BOQ Finance
- Elantis
- Flexi Fundit
- Grow Finance
- Hunter
- IQumulate
- North State
- Premium Pay
- QPR
- Red Planet
- Victory