

WinBEAT4.3 Release Notes

These Release Notes detail all the software releases to WinBEAT4.3 including the major 4.3 upgrade in February 2022.

Your current WinBEAT database MUST be on the latest WinBEAT 4.2 version BEFORE upgrading to WinBEAT 4.3. The latest version is WinBEAT 4.2.34.

If you require assistance with updating your database to WinBEAT 4.2.34 BEFORE the 4.3 Upgrade please contact the WinBEAT Support desk on 1800 807 139.

Please also be aware any client that has **Custom Forms** should **NOT attempt** the 4.3 upgrade until they have contacted the WinBEAT Support desk and discussed with one of our Support Team members.

WinBEAT4.3.13

Released 28/03/2022

Administration

Sunrise Roll back to legacy IE Browser

The following have been reverted back to the legacy IE Browser:

- * QBE Workers Compensation product
- * Claimwrite
- * All Zurich products

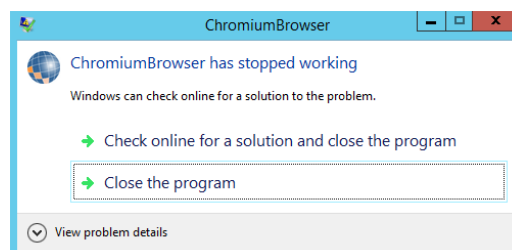
They will be updated to the new Chromium Browser as each underwriter updates their products.

iClose products utilise IE browser

A number of clients have had issue being able to connect to iClose products. We have reinstated the legacy IE browser. They will be updated to the new Chromium Browser as the underwriters update their products.

Browser error

EBIX Browse behavior has improved as the Sunrise window now only opens at 90% instead of a full window. This should stop the Chromium Browser crashing when finalising a transaction in Sunrise. The following error should no longer display:



Reports

Claims Reports

There was an error when trying to preview Claims reports which has been rectified.



WinBEAT4.3.10

Released 21/02/2022

Administration

Internet Interfaces open in Chromium Browser

WinBEAT has a new bundled Internet browser – EBIX Browse. The new browser replaces the previously used legacy Browser IE.

New Database Manager

When Upgrading to WinBEAT 4.3 please do not forget to update your Database Manager

Archive Ledger

The WinBEAT 4.2 Archive ledger should be upgraded as part of your WinBEAT 4.3 Upgrade.

SQL Express 2019

SQL Express 2019 is bundled into the WinBEAT 4.3 installer cd for **new** WinBEAT installations. This replaces SQL Express 2012 which is no longer supported.

SQL password updated

The SQL password has been updated from EID to FID encryption.

The use of special characters such as: !, #, \$ / for use in the SQL password are now available.

FID Password = Winbeat123!*

FID Password = Ss!@#\$\$%^&*[_+:"/

Changes to Post Billpay for DEFT

Australia Post no longer accepts cash when clients pay their DEFT invoices by Post Billpay.

The Post Billpay detail has been updated on DEFT invoices remittance and on the "Invoice Reverse".

Remittance Advice on DEFT Invoice New Post Billpay logo

DEFT PAYMENT SYSTEMS
Please turn over for further payment methods and instructions

B PAY Biller Code: 12345
Ref: 012344819112350

To pay on-line with your credit card (card types here) visit www.abcinsurance.com.au
Client Ref: 013X Invoice Ref: 12365
Call 1300 78 1145. A surcharge may apply.
DEFT Reference Number: 012344819112350

eft Acct Name: ABC Insurance Brokers Trust Account
BSB: 182355 Account: 56498629
Lodgement Reference: 81911235
Please note: Lodgement Reference is required.

ABC Insurance Brokers Pty Ltd
Our Reference: ADAMS S
Invoice No: 12365
Due Date: 15/08/2021

Premium	\$1,235.00
U'writer Levy	\$0.00
Fire levy	\$0.00
GST	\$126.01
Stamp Duty	\$135.85
Broker Fee	\$26.14

AMOUNT DUE \$1,522.00

*123 012344 00819112350
+012344 819112350 < 000152200<3+

Invoice Reverse - New Post Billpay logo and payment options only Cheque or EFTPOS

DEFT PAYMENT SYSTEMS
DEFT is a service of Macquarie Bank

B PAY Card **eft** EFT **Post Billpay** In Person **Mail**

Contact your participating financial institution to make payment directly from your cheque or savings account.
www.abcinsurance.com.au or by phone on 1300 78 1145.

Pay by credit or debit card at a financial institution.
ABC Insurance Brokers Pty Ltd accepts Mastercard, Visa, American Express & Diners Club Cards.

Pay by Direct Bank Deposit by accessing the internet banking site of your financial institution.
It is important that the Lodgement Reference number provided is used in the lodgement reference field of your electronic file or funds transfer system so that your payment can be identified.

Please present page intact at any Australia Post Office.
Payments may be made by cheque or EFTPOS.

Please make any cheques payable to DEFT Payment Systems for ABC Insurance Brokers Pty Ltd.

Detach payment slip and mail with payment to:
DEFT Payment Systems
GPO Box 4690
Sydney NSW 2001

Please make cheques payable to DEFT Payment Systems for ABC Insurance Brokers Pty Ltd.
Please note that receipts will not be issued for mailed payments.

Account Manager

Email alert when Account Manager Changed on Client Account

Many brokers have requested the ability for WinBEAT to report if an Account Manager is changed on an existing Client Account.



A new checkbox is now available for Users with a security level of Administrator giving the ability to activate "Alert on change account manager".

Maintain user

Ms Louise Petersen

Username: louise Security level: Administrator Branch: MAIN

Alert on change bank details: Alert on change account manager:

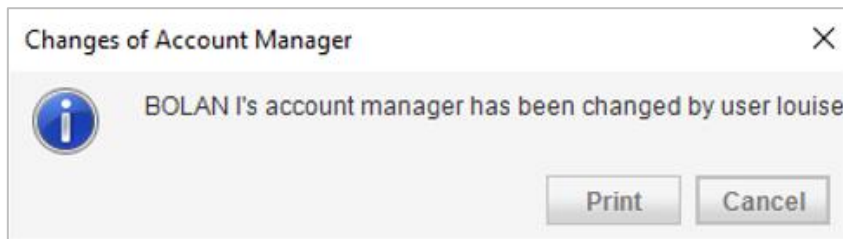
PDF folder: Document folder: CSV folder: Enable Folder Browser:

Contact: Title: Ms First name: Louise Last name: Petersen Telephone: 03 9547 1236 Fax: 03 9654 1236 Mobile: Job title: Assistant Email: louise@abcinsurance.com.au Signature: [Signature]

Buttons: Save, Close

This function may only be activated for ONE Administration log in.

Once activated, when the designated Administrator logs into WinBEAT they will receive a message if anyone has changed the Account Manger on a Client account



They will be able to print a report which outlines the details:

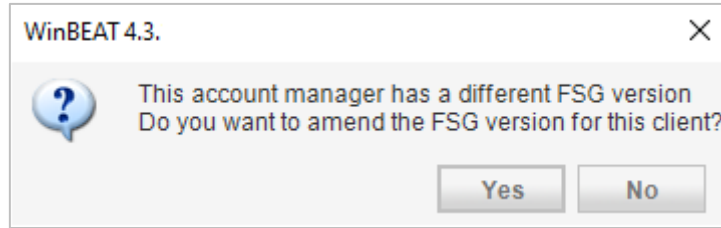


The details will also display on the Activity Log:

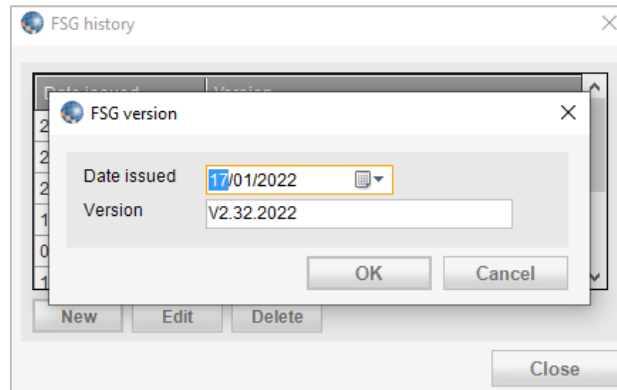
- Who the original Account Manager was
- If the Policy Account Manager has been updated.

Activity Log For Users						
04/02/2022 To 04/02/2022						
User	Date Logged	Type	Source	Activity	Object	
louise	4/02/2022 16:42:29	Client	Client	Amend	BOLAN I	
louise	4/02/2022 16:42:29	Client	Client	H Sharp	BOLAN I	
louise	4/02/2022 16:42:32	Client	Client	Update policy AM	BOLAN I	

If the new account manager has a different FSG the user will also be prompted to update the FSG on the client account.



If YES is selected, the Client account – Additional details tab will open and once the user clicks on the FSG history and selects New, the default FSG version saved on the Account Manager will auto populate.





Search function with Account Manager Security (AMS)

If Account Manager Security (AMS) is activated on a user profile. The Client/Policy enquiry search by email will be restricted to only the clients accessible due to the AMS overlay.

With AMS overlay:

Find Client

Find client by

- Code
- Client number
- Name
- Trading as
- Client group
- Client address
- Insured name
- Contact name
- Contact number
- Policy number
- Invoice number
- Invoice comment
- BPAY reference
- Total premium
- Invoice client balance
- Invoice text
- EDI reference
- Risk description

Email: bigpond

Clients

Code	Name	Email
JONES J	Mr Jack Jones	[3 matches found]

OK Cancel

Without AMS overlay:

Find Client

Find client by

- Code
- Client number
- Name
- Trading as
- Client group
- Client address
- Insured name
- Contact name
- Contact number
- Policy number
- Invoice number
- Invoice comment
- BPAY reference
- Total premium
- Invoice client balance
- Invoice text
- EDI reference
- Risk description

Email: bigpond

Clients

Code	Name	Email
JONES J	Mr Jack Jones	[3 matches found]
NEWTON N	Mr Nigel Newton	[2 matches found]
SMITH J	Jenny Smith	[2 matches found]
SP02468	Body Corporate Strata P..	[2 matches found]
VERAL B	Ms Bernadette Verall	[2 matches found]

OK Cancel

Associates

Secondary or Sub Associate may not be flagged inactive if attached to live policy

Where an Associate is only utilised as a Secondary Associate on a policy or flagged as a Sub Associate, users are not permitted to change the associate card to inactive until all outstanding transactions have been finalised (client, both associates and underwriter paid) and the policy is no longer active (must be in Client/Policy enquiry "All" list not "Live list")

Client Account – Associate Search

A new search function has been implemented in the Maintain Client Window. Users will now have the ability to search for an Associate to attach to the client account.

The default listing, when selecting the drop arrow, will change from Associate description to Associate code.

Clients

Client: [Search] [New]

Unallocated cash \$0.00 [Edit] [Delete]

Details | Additional details | Contacts | User fields

General

Code: []
Name: []
Trading as: []
ABN: []

Contact information

Telephone: []
Fax: []
Email: [] [Send]
Web: [] [View]

Office use

Client group: []
Account manager: []
Associate: [] [Search]

Cross ref client

Addresses

Postal address: []
Suburb/City: []
State: [] Postcode: [] [Search]

The same as above address

Street address: []
Suburb/City: []
State: [] Postcode: [] [Search]

Activity: Active [] Archivable

ANZSIC code: Unclassified [Search]

Documents | Addendum | Export | Diary | Print details

Reset [Save] Close

If the user wishes to search by the associate abbreviation, they will have to utilise the

Search



When the user clicks on the **Search** button the ability to search by Code, Name, Abbreviation and Associate Group is available.

The user does not need to enter the complete client code, complete client name or complete abbreviation – only a few characters will return a match.

Our example below is a search by Associate Name and we only entered the word broker. Any associate that has the name broker in their name will be returned on the search.

Find Associate

Find associate by

Code

Name

Abbreviation

Associate group

Name:

Associates

Show

Code	Name
HORT INS	Horton Brokers Pty Ltd
OBRIEN	O'Brien Insurance Broker

When searching by Associate group WinBEAT provides the drop box for the user to select the appropriate Associate group.

Find Associate

Find associate by

Code

Name

Abbreviation

Associate group

Associate group:

Associates

Show

Code	Name	Associate Group
LANE B	Barbara Lane	Referrer group
SMYTHE D	Dianne Smythe	Referrer group

If the user wishes to search by the associate abbreviation, they will have to utilize the **Search** button and select the Abbreviation option.

If "Lock Associate" in system options has been activated, once the Associate is selected and the Client account "saved". The Search function is deactivated and only the WinBEAT System Administrator may update the Associate on the Client Account.

Clients

Client DIMENSIONS Search New

Dimensions Pty Ltd
Unallocated cash \$0.00 Edit Delete

Details Additional details Contacts User fields

General

Code DIMENSIONS

Name Dimensions Pty Ltd

Trading as

ABN 25 368 154 369

Contact information

Telephone 03 9658 1111

Fax 03 9658 1251

Email admin@dimensioncakes.com.au Send

Web www.dimensioncakes.com.au View

Office use

Client group Commercial Clint

Account manager Leanne Campbell

Associate CAMP INS Search

Cross refer client

Addresses

Postal address 54 Lyre Street

Suburb/City ROCKLYN

State VIC Postcode 3364 Search

The same as above address

Street address 54 Lyre Street

Suburb/City ROCKLYN

State VIC Postcode 3364 Search

Activity Active Archivable

ANZSIC code Cake and Pastry Manufacturing (Factory based) Search

Documents Addendum Export Diary Print details

Reset Save Close



Transactions

Invoice Compliance Type Retail/Wholesale on Amend transactions

It has been brought to some of our brokers attention that users are changing the compliance type on an invoice after the invoice has been sent to the client. That is, they are amending the invoice and changing the invoice compliance type.

When users process a New Business, Renewal or Transfer Renewal Transaction they are able to update the Compliance Type on the "Details Window" to Retail or Wholesale.

Transaction entry > Details
Transaction: New business
Class: HOME Client: WILSO E EDI: WinBEAT

Policy account manager: N INGRAM Nigel Ingram

Details: Policy number: T/BIA, The insured: Emma Wilson, Comment, Invoice text, Funding: Not Funded

Instalments: Pay by instalments

Compliance: Invoice type: [Unknown] (dropdown), Edit, Retail, Wholesale

Options: Add invoice to invoice queue, Change invoice date when printed, Close on receipt, Add invoice to closing queue, Change closing date when printed

Client type: Retail (dropdown)

FSG: 2012/2019 - V 3.5
Privacy: 2012/2019 - V 2.5
Electronic delivery date: 07/12/2017

Transaction entry > Details
Transaction: Amend policy (details only)
Class: HOME Client: WILSO E EDI: WinBEAT

Policy account manager: N INGRAM Nigel Ingram

Details: Policy number: H41345623, The insured: Emma Wilson, Comment: 1 Neptuna Cres. Larrakeyah NT 0820 B-5500K Building and Contents Insurance, Invoice text: 1 Neptuna Crescent, Larrakeyah NT 0820, Funding: Not Funded

Instalments: Pay by instalments

Compliance: Invoice type: [Unknown] (dropdown), Edit, Wholesale

Options: Add invoice to invoice queue, Change invoice date when printed, Close on receipt, Add invoice to closing queue, Change closing date when printed

Client type: Retail (dropdown)

FSG: 2012/2019 - V 3.5
Privacy: 2012/2019 - V 2.5
Electronic delivery date: 07/12/2017

Users are no longer permitted to change the Compliance type on an "Amend Transaction" or a "Rebroke Renewal" – they must refer to the WinBEAT System Administrator who has the ability to do so.

If the transaction has been recovered from a Sunrise or iClose audit recovery, and the Invoice compliance type is "unknown", the user will still be able to amend the Invoice compliance to either Wholesale or Retail.

Sunrise Auto truncate name

Often the Insured name entered into your transaction in Sunrise may be very lengthy.

It is not uncommon for the user to receive an error message 'String or binary data would be truncated. The statement has been terminated.'

WinBEAT has to be closed using Windows Task Manager following this error and the transaction is not created in WinBEAT. The transaction does of course exist in Sunrise and at the insurer end.

This problem has been addressed in this upgrade and the error will no longer occur.

Once the policy is transferred back into WinBEAT, if an "Insured name" is longer than 50 characters, it will display in full on the client schedule.

Schedule of Insurance Page 1

Class of Policy: Home Insurance Policy No: IP 505700
The Insured: Mr Stephen Adams And Members Of His Family Includ Invoice No: 12422
Our Ref: ADAMS S

InsNet Platinum Cover Home and Contents Insurance

Insured(s): Stephen Adams and members of his family including Aunties and Uncles and distant Cousins Plus dogs &

Situation: 23 Smith Street



However, the user should update the details in the WinBEAT "Transaction Entry > Details" tab and split between the two fields for the "Insured name" as per our example below:

Transaction entry » Details

Transaction **Amend policy** Class **HOME** Client **ADAMS S** EDI **Sunrise**

Details | User fields | Summary

Policy account manager **B DAVIES** Barry Davies

Details
 Policy number IP 505700
 The insured **Mr Stephen Adams And Members Of His Family**
Including Aunties And Uncles And Distant Cousins P
 Comment
 Invoice text
 Funding Not Funded

Options
 Add invoice to invoice queue
 Change invoice date when printed
 Close on receipt
 Add invoice to closing queue
 Change closing date when printed

Instalments
 Pay by instalments

Compliance
 Invoice type **Retail**
 PDS
 Advice

 Proposal from client
 Proposal to underwriter
 Cover arranged
 Cover confirmation
 Client type **Retail**
 FSG **20/01/2021 - V 3.5**
 Privacy **20/12/2019 - V 2.5**
 Electronic delivery date

The insured name offers two fields each able to display 50 characters.

Details

Policy number

The insured

If the user updates the two fields for the "Insured name" in WinBEAT, the Insured details will display correctly over the two lines on the Client Invoice.

As per your request, we have arranged the following insurance cover effective from the 1/02/2022. To ensure your protection, we must receive your remittance within 14 days of you receiving this account. Page 1 of 3

Mr Stephen Adams
 GPO Box 23
 COLLINGWOOD VIC 3066

TAX INVOICE
 This document will be a tax invoice for GST when you make payment.
 Invoice Date: 1/02/2022
 Invoice No: 12422
 Our Reference: ADAMS S
 Should you have any queries in relation to this account, please contact your Account Manager Barry Davies

Class of Policy: Home Insurance
Insurer: XYZ Insurance Ltd
 121 Collins Street Melbourne Vic 3000
 ABN: 02 333 444 555

NEW POLICY
Policy No: IP 505700
Period of Cover:
 From 1/02/2022
 to 1/02/2023 at 4:00 pm

The Insured: Mr Stephen Adams And Members Of His Family
 Including Aunties And Uncles And Distant Cousins P



If the user does not update the insured name into the two fields and only leaves the detail in the first field. On completion of the transaction the field will be truncated to 50 characters and only display those 50 characters on the client invoice.

Email: info@ebix.com.au Page 1 of 3

As per your request, we have arranged the following insurance cover effective from the 1/02/2022. To ensure your protection, we must receive your remittance within 14 days of you receiving this account.

Mr Stephen Adams
GPO Box 23
COLLINGWOOD VIC 3066

TAX INVOICE
This document will be a tax invoice for GST when you make payment

Invoice Date: 1/02/2022
Invoice No: 12422
Our Reference: ADAMS S

Should you have any queries in relation to this account, please contact your Account Manager
Barry Davies

Class of Policy: Home Insurance
Insurer: XYZ Insurance Ltd
121 Collins Street Melbourne Vic 3000
ABN: 02 333 444 555

NEW POLICY
Policy No: IP 505700
Period of Cover:
From 1/02/2022
to 1/02/2023 at 4:00 pm

The Insured: Mr Stephen Adams And Members Of His Family Includi

Reports

Diagnostic Report

Diagnostic reports may only be emailed to the WinBEAT Support Desk – the fax number/facility is no longer available. The WinBEAT support email address is winbeat@ebix.com.au

Claims Report – Claims Listing by Policy Class

The ability to sort Claims Listing Reports by Policy Class is now available.

Claims listing

Account manager

All
 Select
 Group

Account manager on

Client Policy

Class

All
 Select

Underwriter

All
 Select

Date of loss

Start date: 01/01/2022
End date: 31/01/2022
 No date of loss included

Sort by

Account manager Class
 Underwriter

Options

Print notes Print schedule

Print Cancel

Interfaces

eLink Import Intermediary details

When using eLink the Intermediary Details Text is not generated. Users may now utilise the "amend" transaction to add the Underwriting Intermediary details

Premium Funding

Arteva Premium and Arteva Principal Premium Funding


Principal Funding & Premium Funding have merged together as Arteva.

Each funder is available individually as Arteva Premium and Arteva Principal in your WinBEAT registration:

Funders			
A	BF		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ArtevaPremium	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ArtevaPrincipal	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Attvest	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	BOQFinance	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Elantis	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	FlexiFundIt	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	GrowFinance	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Hunter	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	IQumulate	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NorthState	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PremiumPay	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	QPR	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RedPlanet	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Victory	
<input type="checkbox"/>	<input type="checkbox"/>	Westpac	

A = Activate BF = Background Funding


Each funder has their own new background funding template.




Pay By The Month
View and accept online

10 monthly payments of
\$1,215.00

VISIT: www.pbtm.com.au
USERNAME: BOWDEN
PASSWORD: 12425

[Click Here](#) 


10 MONTHLY PAYMENTS OF or AMOUNT DUE	\$1,215.00 \$11,000.00
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Pay By The Month
View and accept online

10 monthly payments of
\$68,160.67

VISIT: brokers.principal.com.au/pbm
REFERENCE: REF123456


[Click Here](#) 

10 MONTHLY PAYMENTS OF or AMOUNT DUE	\$68,160.67 \$619,597.00
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Attvest Background Funding Update

Attvest have updated their Background Funding Template for New Business transactions.

The template now displays "Plus initial Application Fee"

PAY MONTHLY **ATTVEST**
FINANCE 

[Click Here to Complete Details](#)

10 Monthly Instalments of \$116.93
Plus initial Application Fee of \$50.05


URL: base.attvest.com.au/online
Reference: REF123456

10 MONTHLY PAYMENTS OF or AMOUNT DUE	\$116.93 \$1,017.50
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BOQ Background Funding Update

Bank of Queensland have updated their Background Funding Template for New Business and Opt In/Opt Out transactions.

The template now displays additional text "Total Amount Repayable".



Pay by Monthly Instalments

	Instalment Amount	\$90.31
	Number of Instalments	10
	First Instalment Date	1/02/2022
	Total Amount Repayable	\$903.10


To pay by monthly instalments, [Click Here](#) or visit:
brokerpoint.com.au/pbmi
 and enter Reference: REF123456

10 MONTHLY PAYMENTS OF	\$90.31
or AMOUNT DUE	\$775.50

Elantis Background Funding Update

Elantis have updated their Background Funding Template for New Business transactions.

The template now displays two boxes with premium and instalment information as well as the summary of payment options.




PAY MONTHLY NOW

10 instalments of \$90.31

Total amount payable \$903.10
(includes credit charges and application fee if applicable)

Click here to accept online or visit
select.elantis.com.au/pbtm

Enter code: REF123456



10 MONTHLY PAYMENTS OF	\$90.31
or AMOUNT DUE	\$775.50