

Learning Objectives

This course is aimed at experienced WinBEAT users who want to utilise their WinBEAT database to create reports, letters and email lists.

Participants will learn to extract data using WinBEAT Custom Reports and then manipulate, sort, order, filter and utilise the data using Microsoft Word, Excel and Outlook.

Prerequisites:

- Reasonable proficiency in Microsoft Word, Excel and Outlook
- WinBEAT Introduction Course or equivalent skills

Methodology:

Instructor lead classroom training with hands on practical exercises from a comprehensive course manual

WinBEAT Custom Report Fundamentals

Logging Into WinBEAT

Overview of Custom Reports

- Marketing Facility
- Compliance Details
- Custom Report Features
- ODBC and Database Connectivity
- MS Database Queries (DQY)

What is a CSV File?

- Database Terminology
- Understanding Fields
- New Custom Report Fields
- Saving and Naming Conventions
- Where to start with my Report
- Storing Custom Reports
- Copying a Report

Maintain Menu

User Defined Fields

- What are User Defined Fields?
- Understanding Field Formats
- Creating a Table
- Adding Table Values
- Assigning a Table to a User Field
- Mandatory User Fields
- Assigning a Text Defined Field

- Assigning a Date Defined Field
- Assigning an Invoice Field
- Assigning a Claims Field
- Maintain/ Edit a Table
- Maintaining Client User Fields
- Maintaining Invoice User Fields
- Maintaining Claims User Fields
- Printing User Defined Fields

Working with Custom Reports

Creating a Basic Custom Report

- Creating a Basic Report
- Re-arranging Field
- Preview a Report
- Saving and Printing Reports
- Deleting a Report

Editing an Existing Report

- Applying a Filter and Sort
- Removing a Filter or Sort
- Adding or Removing Fields

Additional Buttons

- Export DQY
- Export CSV
- Export to Word

Working with a DQY

Understanding DQY Files

- Exporting Report as a DQY
- Import and Open DQY in Excel
- Automatic Updating of DQY

Custom Reports & DQY

Workshop

Attendees have an opportunity to work independently through a number of Custom Report Scenarios

Working with DQY In MS Excel

- Editing a DQY in Excel
- Re-ordering Columns
- Formatting Fields
 - Date
 - Premium (Numeric)

- Using Auto Sum
- Applying a Filter and Sort
- Saving Formatted DQY as Excel File

Other WinBEAT Courses available:

- Introduction to WinBEAT 3.3 Transaction Processing Level 1

- Intermediate WinBEAT 3.3 Transaction Processing Level 2

- Intermediate WinBEAT 3.3 Accounting Level 1

- Intermediate WinBEAT 3.3 for System Administrators

- Advanced WinBEAT 3.3 Accounting Level 2

Working with Excel Data into Microsoft Word

Mail Merging with Excel Data

Add Merge Fields to a letter
Perform a Mail Merge

Setting Query Options

Setting an "AND" Query
Setting an "OR" Query

Working with DQY in Microsoft Word

Mail Merging with a DQY

Merge Directly from DQY
Using DQY as Data Source

Setting a Criteria

Viewing Merge Results

Merging DQY with Labels

Working with a CSV File

Understanding CSV Files

Saving Custom Report as CSV
Export Report as a CSV

Open CSV File in Microsoft Excel

Creating an Email List for MS Outlook

Create Email list from Excel Data

Purpose for Email List
Extract Data in Custom Reports
Save as a CSV File

Filter CSV File in Excel
Import CSV File into Outlook
Updating your Contact List

WinBEAT Export

Creating MS Word Templates

What is Export?
WinBEAT Export Fields
Specify Template Path
Activate Forms Toolbar
Inserting Form Fields
Working with Date Fields
Working with Numeric Fields
Saving the Template

Working with Export in WinBEAT

Using Export from WinBEAT
Transaction Entry
Custom Reports
Client Manual
Reports Menu
Client Account
Claims

New Custom Reports Export to Word

Understanding Export to Word
Form Fields & Bookmarks

Export Report to MS Word
Saving Merged Documents