

Learning Objectives

This Course is designed for WinBEAT System Administrators.

Upon completion of the course participants will have an excellent grasp of maintaining and administering a WinBEAT Database.

Participants will learn how they can utilise the new enhancements and features within their business to increase efficiency.

Prerequisites:

- Excellent Windows skills
- A strong working knowledge of WinBEAT
- WinBEAT Administrator Security Level access to their WinBEAT database

Benefits:

Gain the skills and understandings to be a supportive and pro-active WinBEAT System Administrator and learn to manage the database for optimum efficiency and benefit to the business.

Methodology:

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

Introduction

Overview

What's New in Version 3.3?
Using the ABC Training Ledger
Logging into WinBEAT

WinBEAT Help Menu

CIP Points
WinBEAT Assistance & Help Menu

System Admin Notes

Screen Resolution
User Enhancement
Database Information
Sub Intermediary renamed
Support Login

Maintain Menu

Client Account
Underwriter Account
Groups (new menu)
Associate Account
Class Groups
Classes & Policy Packs

Group Reporting
Schedule – background colour
Standard Wordings – IBD/FOS
Mandatory User Defined Fields
Cancellation Codes

Diary Module

Diary Options

Automated Diary Entries
Maintain Diary Types
Understanding Calendar View

Working with Diary Entries
Understanding Item View
Diary Button
Moving Diary Entries

Email Templates

Purpose for Email Templates
Creating Email Templates

Maintaining Email Templates

Transaction Processing

New System Options

Print Advice on New Page
Mandatory Invoice Compliance

Transaction Entry

Processing a New Business

Details Window Enhancements
Automated Diary Entries
Working with Mandatory Fields
Email Templates

Other Processing Options

Multiple Associate Transactions
Account Manager at Policy Level
Multi Client System Options
Multi Client Invoicing

Maintain Menu

Transfer Policy to another Client
Transfer Policy History

Other WinBEAT Courses:

- Introduction to WinBEAT
3.3 Transaction Processing
Level 1

- Intermediate WinBEAT
3.3 Transaction Processing
Level 2

- Intermediate WinBEAT
3.3 Accounting Level 1

- Advanced WinBEAT
3.3 Accounting Level 2

- Advanced WinBEAT
3.3 Integrating WinBEAT
& MS Office

Sunrise Exchange Menu

Sunrise Transaction Entry
Sunrise Forms/Templates

Audit Recovery Reports
Additional Sunrise Reports

Bank Menu

Receipting

Multi Client Policy Receipting
Multi Select Totals
EFT & EFT Batch Changes
BPAY Batch
Underwriter Receipt/credits only

Automated Banking System Options

Lock Bank Account Details
Working Account Details
GST Account Details

Payments

U/W & Associate Payments

Automated Banking & MPP

GST Payment
Drawing Income
Creating Bank File
MPP & Macquarie Premium
Funding

Enquiries Menu

Client / Policy Enquiry

Display Fax & Activity
Associate Label
Trading As
Contact Information
Cross Reference

Edit Client Addendum
Cancelled Policy View
Invoice Risk Enquiry
New Find Fields
EDI Reference
Client ID
Diary Button

Reports Menu

Reports Menu

Policy & Client Account Manager
Premiums Received Report
GST Free Report
Domestic Bordereau Report
Compliance Reports by Category
Unpaid Premiums UW Advice
Underwriter Group Reports
Cancellation Report
Client Insurance Manual

Enquiries Menu

IBA Enquiry Report
Financial Snapshot Print Option
Historical Sales – Show GST

Custom Reports

New Export to Word
Understanding Bookmark
Fields

Claims Menu

Claims Enquiry & Edit
Print Notes

Claims Automated Diary Entries
Multi Client Claims