

Learning Objectives

This course is aimed at existing WinBEAT users. Upon completion of the course participants will have a sound understanding of all aspects of transaction processing in WinBEAT

Prerequisites:

- Understanding of General Insurance
- Introduction to WinBEAT Course

Benefits:

Participants will learn to process more complex transactions which will increase their working knowledge of WinBEAT

Methodology:

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

Introduction

Overview

Logging into WinBEAT
Using the ABC Training Ledger

WinBEAT Help Menu

Using the Help Manual
Using 'What's New'
Email WinBEAT Support

Navigating WinBEAT

WinBEAT Toolbar
Keyboard Shortcuts
Multiple Document Interface

User & Security Levels

WinBEAT User Security Levels
Creating a New User
Email Templates

Maintain Menu

What's New in Maintain

Client Account Enhancement

Trading Name
Changing Account Manager
Associate on Client Account
Cross Reference
Account Activity
Archivable Flag
Compliance Fields
Contacts Enhancement
Mandatory User Fields
Diary Button (optional)

Activity

Underwriter & Associate

Groups

Associate Groups
Policy Class Groups
Policy Class Fees & Rates

Invoice Menu

WinBEAT Transaction Concepts

What is a Policy?
What is an Invoice?
What is a Risk or Section?
What is a Multi Section Policy?
What is a Pack Policy?
What is a Multi Client Policy?
What is Co-Insurance?
What is an Overseas Policy?

What's New in Trans Entry

Multi Associates
Details Window Enhancement
Mandatory Fields
Account Manager on Policy
Automated Diary Facility
Multi Client Invoices
Cancellation Codes

Transaction Processing

New Business
New Business GST free
Processing a Quotation
Converting a Quotation

Endorsements

Pro-Rate Endorsement
Return Premium
Unconfirmed Endorsement
Confirm an Unconfirmed
Fee or Commission only

Cancellations

Understanding Cancellations

Compliance Menu

Client Advice
Edit Compliance Advice

Other WinBEAT Courses:

- Introduction WinBEAT 3.3
Transaction Processing Level 1
- Intermediate WinBEAT 3.3
Accounting Level 1
- Intermediate WinBEAT 3.3
for System Administrators
- Advanced WinBEAT 3.3
Accounting Level 2
- Advanced WinBEAT 3.3
Integrating WinBEAT & MS
Office

Invoice Menu

Other Processing Types

Multi Section Policy

- Create a Multi Section Policy
- Endorse a Multi Section Policy
- Enquire on Multi Section policies

Pack Policy

- Create a Policy Pack Class
- Create Policy Class Sections
- Process a Policy Pack

Multi Client Invoicing

- System Option Setup
- Multi Client Accounts
- Processing a Multi Client Invoice
- Enquiring on Multi Client Invoice

Underwriter Agency

- Underwriter Agency Account
- Process U/W Agency Invoice
- Enquire on U/W Agency

Co-Insurance Policy

- Process a Co-Insurance Policy
- Enquire on Co-Insurance

Overseas Underwriting

- What is O/Seas Underwriting?
- O/Seas Underwriter Accounts
- Process an Overseas Policy
- Enquire on Overseas Policy

Maintain Menu

- Transfer Policy to another Client
- Transferring Policy History

Sunrise Exchange Menu

- Sunrise Forms/Templates
- Sunrise Audit Recovery
- Advanced Recovery
- Close VS Unclose

- Receipting Sunrise Transaction
- Sunrise Documents

Enquiry Menu

Client Policy Enquiry

- Sort by Headings
- View & Edit Client Details
- Policy History

- Client Statement
- Using Find and Search
- Invoice Activity
- Diary Button

WinBEAT Reports

Reports Menu

- Debtors Reports
- Sales Transaction Listing
- Client Schedule of Insurance
- Summary Schedule
 - WinBEAT Support
- Enquiry Forms
- Client Ranking

Enquiry Reports

- Graphic Analysis – Forecast