

Learning Objectives

In this course attendees will learn basic, day to day, practical skills for processing in WinBEAT.

Prerequisites:

- Understanding of General Insurance
- Basic understanding of Windows and reasonable keyboard skills

Benefits:

Participants will learn the correct methods for processing transactions in WinBEAT.

Methodology:

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

Next Step:

Intermediate WinBEAT 3.3 Transaction Processing Level 2

Introduction

Overview

What is WinBEAT?
Using the ABC Training Ledger
Logging into WinBEAT

WinBEAT Help Menu

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

Navigating WinBEAT

Working with WinBEAT
Keyboard Shortcuts
Multiple Document Interface

User & Security Levels

Creating a New User
WinBEAT Security

Maintain Menu

Client Groups

What is a Client Group?

Account Managers

What is an Account Manager?

Underwriter Accounts

What is an Underwriter?

Associate

What is an Associate?

Client Account

What is a Client Account?
Understanding Client Codes
Create a New Client Account

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?

New Business

Selecting Class & Underwriter
Inception & Expiry Dates
Premium Components
Schedule Template
Comment/Invoice Text Fields
Invoice Compliance
Schedule Preview
Automated Diary Entry

Additional Transaction Functions

Summary/Compliance tab
User Fields
Finish & Print
Funding
Export

Amend Policies/Endorsement

Guidelines for Amending
Processing an Amendment

Renewals

Renewals Pending Report
Processing a Renewal Invoice

Endorsements

Creating an Endorsement
Extra, Return & Nil Premium
Comment/ Invoice Text Fields
Understanding Notation

Cancellations

WinBEAT Cancellation Types
Cancel a Policy Mid Term
Cancel an Endorsement
Cancellation Enquiry

Edit Invoice Compliance

Invoice Client Advice

Transaction Entry Workshop

Attendees work independently through transactions.

Other WinBEAT Courses:

- 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
- Advanced WinBEAT 3.3 Integrating WinBEAT & MS Office

Sunrise Menu

Sunrise Transaction Entry

Process a Sunrise Quote
Convert a Sunrise Quote
Close VS Unclose
Receipt Sunrise Transactions

Amend or Endorse a Policy
Lapse or Cancel a Policy
Sunrise Documentation

Trainer Demonstration Only

Renewals / Import Renewals

Enquiry Menu

Client Policy Enquiry

All, Live & Outstanding
View Balances
Selecting Tabs & Headings
Viewing Schedule or Notation
Comment & Invoice Text
Funding Status

Understand Invoice Activity
View Policy/Invoice
Last Invoice on Policy
Unallocated Cash
Using Find and Search
Client Statement
Print Forms

Claims Menu

Claims Processing

Processing a Claim
Understanding Claims
Enquiry

Claims Printing
Claims Reports

WinBEAT Reports

Enquiry Reports

Unallocated Cash

Reports Menu

Debtors Reports
Client Statements
Final Notice
Enquiry Forms