

Intermediate WinBEAT4 Administration

Learning Objectives

The Intermediate WinBEAT4 Administration Course, is designed for users with WinBEAT Administrator Security Level.

Upon completion of the course participants will have an excellent grasp of maintaining and administering their WinBEAT4 Database.

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

Prerequisites:

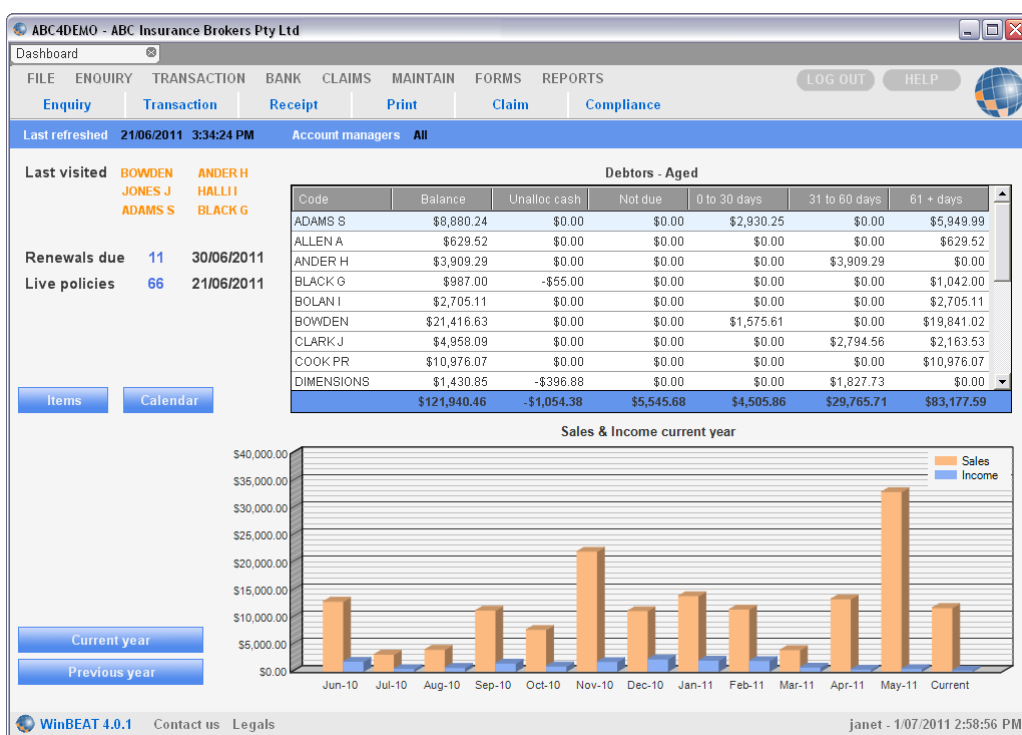
- Excellent Windows skills
- A strong working knowledge of WinBEAT
- WinBEAT Administrator Security Level access to their WinBEAT database

Benefits:

Gain the skills and understandings to be a supportive and pro-active WinBEAT4 System Administrator and learn to manage the database for optimum efficiency and benefit to the business.

Methodology:

Instructor lead classroom training using hands on, practical exercises from a comprehensive course manual.



WinBEAT4

Course Content

Introduction to WinBEAT4

- What is WinBEAT4?
- Using ABC Training Database
- Logging into WinBEAT4
- WinBEAT4 User Interface

What's New in WinBEAT4?

- New Features
- New Enhancements

WinBEAT4 File Menu

Administration

- Exploring System Option Tabs
- User Configuration
- Document Packaging
- Maintain Sequence Numbers
- WinBEAT4 Document Folders
- Download & Install Updates

- Diagnostic – Data integrity
- Maintain Printing Options
- Utilising Branches

WinBEAT4 Dashboard

- Dashboard Security
- Set up Dashboard Profiles
- Schedule Data Collection Task
- Dashboard Functionality
- Open & Close Dashboard Display

WinBEAT4 Diary

- View WinBEAT4 Calendar
- View Calendar Types
- View Task Options
- Working with Calendar
- Managing Tasks

WinBEAT4 Maintain Menu

- Working with Groups
- Classes & Policy Packs
- Managing Rates
- Cancellation Codes – Why?
- UDF – Client, Invoice & Claims

WinBEAT4 Bank Menu

- Automated Banking
- Macquarie Premium Payments
- OPG – On Line Payment Gateway

WinBEAT4 Transaction Menu

Compliance

- Electronic Day Book - Client Addendum
- Maintain Client & Invoice Compliance
- Compliance Reporting

WinBEAT4 Support Login

- Managing Quotes
- Bulk Update FSG

WinBEAT4 Database Manager

- Manual Backup
- Scheduled Backup
- Testing Data Restore
- Copy Live to Training
- Archive & Delete

Additional Ebix Services

- eLink Transactions & Pay File
- iClose Transactions
- iClose Accounting
- Database Services – Merge & Delete



WinBEAT4