

Introduction to WinBEAT4

Learning Objectives

The Introduction to WinBEAT4 Course, is designed for attendees to acquire the necessary basic skills for navigating and processing WinBEAT and Sunrise transactions on a daily basis.

Prerequisites:

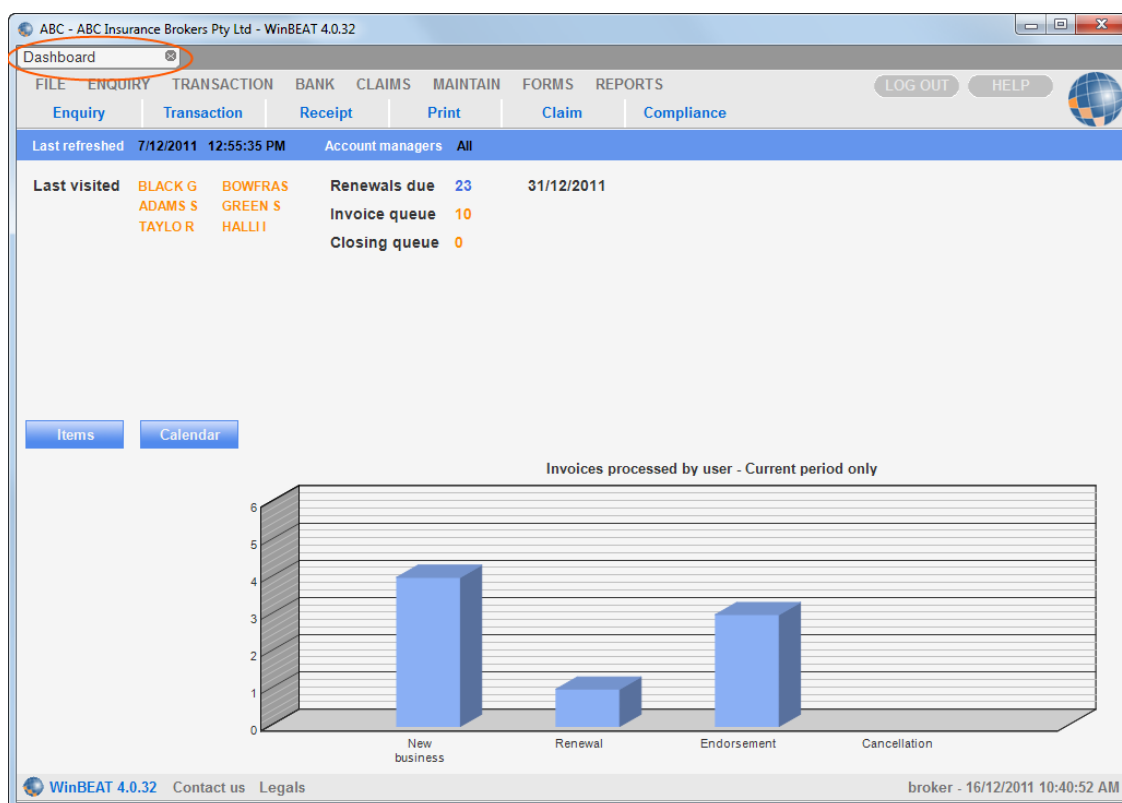
- Understanding of General Insurance terminology
- Basic understanding of Windows and reasonable keyboard skills

Benefits:

Participants will learn the correct day to day methods for processing transactions in WinBEAT and Sunrise.

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
- Understanding Dashboard
- Navigating WinBEAT4
- Switching Tasks
- WinBEAT4 On Line Help

WinBEAT4 Maintain Menu

- Creating a Client Accounts

WinBEAT4 Transaction Menu

- What are WinBEAT Transactions?
- What are Sunrise Transactions?

WinBEAT Transactions

New Business

- Select Class & Underwriter
- Inception & Expiry Dates
- Premium Components
- Working with Schedule Templates
- Invoice & Comment Fields
- Invoice Compliance
- Underwriter & Client Notes
- Schedule Preview
- Finish & Print or Finish

Amend

- Amending Principles
- Processing an Amendment

Endorsements

- Endorsement Principles
- Processing Endorsements

Cancellation

- Cancellation Principles
- Processing Cancellations

Renewals

- Renewal Reports
- Processing a Renewal

Sunrise Transactions

Understanding Sunrise

- Sunrise Transaction Options
- Printing Invoices – No Closings
- Close VS Unclosed

Sunrise Quotes

- Sunrise Quote VS On Line Quoting
- Process a Sunrise Quote
- Convert Sunrise Quote/ New Business

Sunrise New Business

- Process a Sunrise New Business
- Confirm or Suspend

Sunrise Amend

- Amending Principles

Sunrise Endorsements

- Endorsement Principles
- Processing an Endorsement

Sunrise Cancellations

- Cancellation Principles
- Processing Cancellations

Sunrise Renewals

- Renewal Requests & Imports

Forms Menu

- Printing Sunrise Documents

WinBEAT4 Client/Invoice Compliance

- Edit Compliance Options

WinBEAT4 Enquiry

- Understanding Client/Policy Enquiry

WinBEAT4 Processor Dashboard

- Working with Processor Dashboard

WinBEAT4 Bank Menu

- Processing a Basic Client Receipts

WinBEAT4 Claims Menu

- Processing Claims
- Claims Enquiry
- Claims Reports

WinBEAT4 Transaction Workshop

WinBEAT4 Reports

- Reprinting Invoices & Closings
- Debtors Reports
- Client Statements & Final Notices
- Enquiry Forms



WinBEAT4