

Volume 22  
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It has been an exciting six months for Ebix beginning with our acquisition of EbixExchange (formerly Telstra eBusiness Services) on the 2<sup>nd</sup> January 2008.

The acquisition provides us with the opportunity to enhance the range of services available to our traditional intermediary clients as well as providing a new range of services to insurers.

Our aim is to provide a greater range of e-commerce services and products that deliver business efficiencies and cost savings. As a technology innovator we plan to deliver a range of solutions and services to extend the boundaries of the e-commerce marketplace.

We are already noticing benefits from all being under the one roof and over the coming months you should see even more operational efficiencies.

An EbixExchange component has been added to our newsletter, so you will find all the latest Sunrise news on page 4.

It was 'Conference Season' earlier in the year with the AIMS conference in Macau in February followed almost immediately by the Steadfast Convention in Adelaide in March, our own Staff Conference in Sydney, as well as the Aon Retail Conference and The AAIB Conference in Ballarat in April.

The AIMS Convention was a good opportunity to hear first hand some of the plans for AIMS.

We had a large team at the Steadfast Convention and it was a good opportunity to see all our

Steadfast customers and to be a part of another successful convention.

The AAIB (RIBA) Conference was well attended by regional brokers from all over Australia this year, with the largest attendance on record. We enjoyed chatting with both our local and interstate customers.

We are currently working hard on our next major release of WinBEAT - Version 3.3, which we plan to roll-out throughout October. We will be running WinBEAT 3.3 Workshops in all capital cities during November so check out the workshop dates on page 5 and put them in your diary. All WinBEAT training from October will be based on this new 3.3 release.

We would like to welcome Yusef Mekaoui to our helpdesk team. Yusef started with us in April and has a background in technical and software support. He has already taken on many of the more technical support issues and we think he is proving to be an asset to the Helpdesk team.

Unfortunately we will be having a small price rise for WinBEAT subscriptions from July 1 averaging around 5%. You will receive a letter with your next renewal outlining the price change.

Your WinBEAT End of Financial Year Checklist is attached with this newsletter and as always we will extend support to 6:30 pm EST on Monday 30th June.

Kiersten Lethbridge  
Divisional General Manager

### WinBEAT End of Financial Year Checklist

Your End of Year checklist is attached with this Newsletter.  
You can go to [www.ebix.com.au](http://www.ebix.com.au) to download the checklist.

Select - Intermediary - WinBEAT - Support – Hot Tips

**Our Helpdesk hours will be extended to 6:30 pm on Monday 30th June**

### WinBEAT *Hot!* Tips

#### End of Financial Year Checklist

We have once again produced our WinBEAT End of Financial Year Checklist to ensure that you complete all of the activities and reports required for your End of Financial Year.

The checklist not only provides information on which reports to run throughout June to help you ensure your WinBEAT data is clean and tidy for the June 30 close, but also which additional reports you should run at the end of June for audit purposes.

The checklist is attached with this newsletter. Alternatively, you can download it from [www.ebix.com.au](http://www.ebix.com.au): select - [WinBEAT - Support - What's New](#).

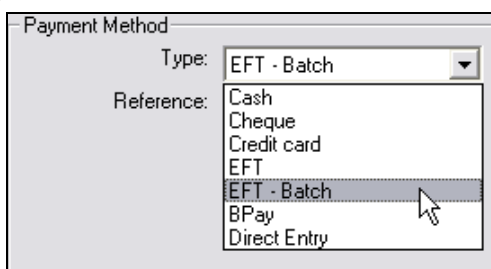
#### Working with EFT Receipts

Many of you have EFTPOS machines in your office and the ability to process credit card receipts directly into your Trust Account.

These transactions are 'batched' by the bank on a daily basis and posted to your trust account as a single amount. They will also be displayed as a single amount on your bank statement.

In WinBEAT, **EFT Batch** should be selected by a user when processing any credit card receipts that are transacted via the EFTPOS machine.

The user should process each individual credit card receipt in WinBEAT, selecting **EFT Batch** for each receipt.



At the end of the day the total for your EFT Batch receipts in WinBEAT should then be equal to the "Settlement" total that is produced on your EFTPOS machine.

The WinBEAT **Summary IBA** (Insurance Broking Account) report will display one "batch" transaction to match your actual bank statement. The WinBEAT **Detailed IBA** report will display the individual transactions within each daily batch.

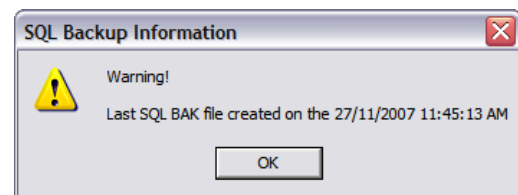
EFT should only be selected when processing a receipt for a client who has transferred funds directly into your trust account, as each EFT transaction is displayed as an individual amount on both the Summary and the Detailed IBA Reports.

#### Disaster Recovery

Your Financial Services Licence requires that you have adequate technological resources, an IT strategy and a fully tested Disaster Recovery Plan in place. Your Disaster Recovery Plan should be designed to ensure that you can get back to business and continue to service your customers as quickly as possible after a catastrophic event.

Obviously, a major part of the Disaster Recovery Plan involves your computer systems and software. It is surprising how often we deal with customers who do not perform regular back-ups of their WinBEAT database and those who cannot find the WinBEAT Upgrade-Installation CD. These two things are key components of any Disaster Recovery Plan.

WinBEAT version 3.2.20 or above displays a warning message if it cannot find a .BAK file that is less than 2 days old:



If this message is displayed it means that the WinBEAT .BAK file has not been created and backed up as part of your scheduled back-up. You should immediately check your WinBEAT back-up routine to ensure it is working correctly.

The WinBEAT 3.2 Installation CD contains documentation on WinBEAT Back-up and Database Manager tools.

Storing the WinBEAT Installation / Upgrade CD in an appropriate location to ensure it is accessible when required is up to you, however the entire installation CD can be downloaded from our web site if required. Ebix Consulting can assist with your Disaster Recovery process and you can contact our helpdesk for further information.

#### WinBEAT Release 3.2.28

The WinBEAT 3.2.28 update was recently released. You should ensure you have updated WinBEAT prior to End of Financial Year as there are a number of key fixes and enhancements included in the release.

You will need to make sure you have the WinBEAT 3.2 Upgrade CD on hand prior to running the update as WinBEAT may request access to the CD to check installation details as part of the update process.

Release Notes can be found in the **H**elp menu - **W**hat's **N**ew or you can download them from [www.ebix.com.au](http://www.ebix.com.au) [Intermediary - WinBEAT - Support - What's New](#)

## WinBEAT Major Release 3.3

Our next major release - WinBEAT Version 3.3 is scheduled to be rolled out throughout October 2008.

This release contains numerous enhancements that have been requested by our users.

Some of the WinBEAT 3.3 major enhancements include:

- Multi-Client Invoices – one invoice can be split between a number of clients
- Two Associates (sub-intermediaries) on an invoice – allows for a commission split.
- Account Manager on policies not just clients – allows Account Manager Sales and Income reporting at policy level
- Database Required Fields – allows System Administrators to define the Fields in the database that must be completed before a client account or transaction can be saved.
- WinBEAT Payment Gateway - brokers can let clients pay their invoice via a payment interface on the brokers web site
- New Management Reports including Renewal Retention and Quote Conversion reports
- Flag Client, Underwriter or Associate (sub-intermediary) as 'Inactive' so they cannot be selected for transactions.
- DOFI Reporting Requirements – see below

Keep an eye on our website at [www.ebix.com.au](http://www.ebix.com.au) for further information about the WinBEAT 3.3 Release and check out page 5 of this newsletter for WinBEAT 3.3 Workshop dates.

## DOFI Reporting Requirements

NIBA recently welcomed a decision by the Federal Government to defer the deadline for the introduction of new reporting requirements for brokers placing business with direct offshore foreign insurers (DOFIs) for an additional three months. The new requirements will not now commence until October 1.

From October 1 insurance brokers will need to maintain records of business placed with DOFIs and report their dealings on a regular basis to ASIC. We are working closely with NIBA and industry bodies to ensure the reporting requirements are catered for within our broking systems. We will shortly release a White Paper on DOFI Reporting Requirements which will be available for download from [www.ebix.com.au](http://www.ebix.com.au).

## [www.ebix.com.au](http://www.ebix.com.au)

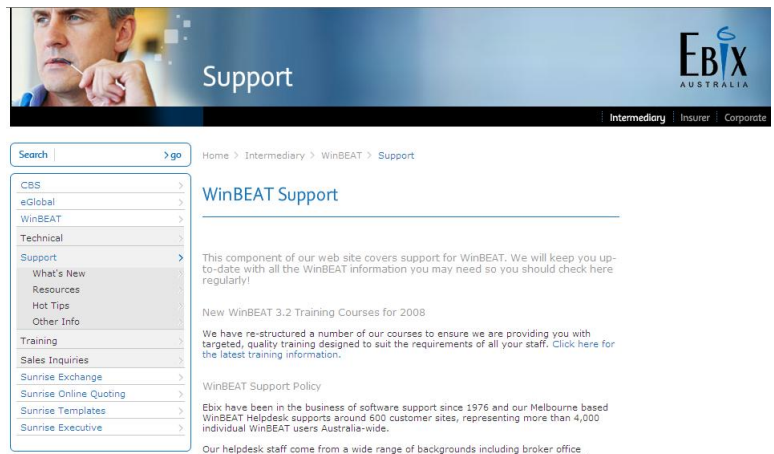
We have finally launched our new web site at [www.ebix.com.au](http://www.ebix.com.au) which provides information for the entire Ebix Australia suite of products.

### Broking Systems:

- CBS
- eGlobal
- WinBEAT

### EbixExchange Products:

- Sunrise Exchange
- Sunrise Online Quoting
- Sunrise Templates
- Sunrise Executive



You will find lots of useful information including our latest WinBEAT training courses, dates and locations.

Our WinBEAT End of Financial Year Checklist is also now available and can be downloaded from:

### Intermediary – WinBEAT – Support - Hot Tips

The Checklist will remind you of all the clean-up, activities and additional reports that you need to complete for your End of Financial Year.

The WinBEAT "What's New" Release Notes can also be downloaded at any time – a useful thing to do *before* you do an update so you are aware of all the changes and can provide a précis for your staff.

We have also changed our email addresses so you may want to update your email address book for the following email addresses:

WinBEAT Support	<a href="mailto:winbeat@ebix.com.au">winbeat@ebix.com.au</a>
WinBEAT Training	<a href="mailto:wbtraining@ebix.com.au">wbtraining@ebix.com.au</a>
Sales – all products	<a href="mailto:sales@ebix.com.au">sales@ebix.com.au</a>

## Sunrise Update

### Sunrise Training & Support

#### Sunrise Exchange Training Availability

With the recent acquisition of EbixExchange, we are pleased to offer you the following training options:

#### Introducing WebEx Web Based Training

WebEx training has been widely accepted by our customers as it offers an excellent alternative when onsite training is not available. WebEx training provides instructor led, customised web-based training designed to satisfy unique requirements.

We are now very pleased to offer WebEx training for both Sunrise Exchange and Sunrise Online Quoting which you can schedule on an as-required basis. WebEx training allows you to book either a 30 or 60 minute training session that will comprehensively cover particular topics within Sunrise Exchange and Online Quoting.

For more information about this unique training tool simply email [training@ebix.com.au](mailto:training@ebix.com.au).

#### On Site Training

Onsite training may be conducted on an individual or group basis. One of our professional trainers will attend your office to assist you in gaining a better understanding of using Sunrise Exchange through WinBEAT.

#### User Guides

We have a variety of user guides and reference guides that cover both Sunrise Exchange and Online Quoting. To request an updated version of a document simply email [training@ebix.com.au](mailto:training@ebix.com.au) with your requirements.

#### Upcoming Release!

In the second half of 2008 we will be introducing Sunrise Exchange modules into some of our standard WinBEAT Classroom training courses. This is designed to give you a better understanding of Sunrise Exchange from introductory through to administrator level.

#### Contact Us

For more information regarding Sunrise Exchange training or to discuss your specific needs, you can email [training@ebix.com.au](mailto:training@ebix.com.au) or contact our Client Relationship Manager, Joanne Matic on (03) 9899 3388.

### Sunrise Templates

Sunrise Templates are designed to replace the text sent by the insurers that forms the schedule on your WinBEAT Invoice.

With Sunrise Templates, it is no longer necessary for your staff to re-key or reformat insurer text for your invoices. Sunrise Templates take the text sent by the insurer's Sunrise product and reformats it using rich text format.

Sunrise Templates will:

- provide standard formatting across insurer products
- ensure schedules are easy to read for your staff and clients
- eliminate the need to retype information
- use Rich Text Format which allows your choice of fonts, bolding and underlining
- add a professional look and feel to your invoices

For more information about Sunrise Templates please go to our website [www.ebix.com.au](http://www.ebix.com.au) or email [templates@ebix.com.au](mailto:templates@ebix.com.au).

### Online Quoting

Do you know that **Sunrise Online Quoting** gives you:

- Real time online comparative quoting for
  - ✓ Six Home Insurers – Allianz, Anzvar, Calliden, CGU, QBE and Vero
  - ✓ Four Motor Insurers – Allianz, CGU, QBE and Vero
- Australia wide rates
- Single question set, saving time and effort
- Ability to convert online quotes to Sunrise Exchange new business without having to re-key into WinBEAT
- Ability to store and retrieve quotes for up to 18 months
- Policy features and benefits comparison using PolicyComparison.com
- Glasses and Redbook support

If you haven't already made the move to connect to Sunrise Online Quoting why not take advantage of our 14 day trial.

For more information about Sunrise Online Quoting please go to [www.ebix.com.au](http://www.ebix.com.au) or email [onlinequoting@ebix.com.au](mailto:onlinequoting@ebix.com.au).



## WinBEAT Training

### WinBEAT Training 2008

WinBEAT courses have been scheduled through to December 2008 so make sure you maximise your software investment and book yourself or a member of your staff into a course near you.

Not only do you and your staff earn 6 CIP points for each WinBEAT course but you will also learn how to:

- ✓ use WinBEAT to make your back-office procedures more efficient
- ✓ track and manage compliance issues
- ✓ automate some of the more repetitive activities that your staff are required to do
- ✓ enhance productivity

Don't forget that annual training is included as part of your WinBEAT subscription. You can easily check your training credits by emailing:

[wbtraining@ebix.com.au](mailto:wbtraining@ebix.com.au)

#### WinBEAT Release 3.3 Training

Our new major release WinBEAT 3.3 is due out in October 2008 and we will be running WinBEAT 3.3 Workshops in all capital cities throughout November.

WinBEAT release 3.3 Workshops will be held on the following dates:

Melbourne	Tuesday 28 <sup>th</sup> October
Sydney	Thursday 6 <sup>th</sup> November
Adelaide	Wednesday 12 <sup>th</sup> November
Brisbane	Tuesday 18 <sup>th</sup> November
Perth	Tuesday 25 <sup>th</sup> November

The **WinBEAT 3.3 For System Administrators** course will be introducing this new version from October onwards – check the course dates below.

### Course Dates July – December 2008

VICTORIA		
Melbourne	WB 3.2 for System Administrators	Fri 11 Jul
Melbourne	Integrating WinBEAT & MS Office	Thu 17 Jul
Melbourne	Intermediate WinBEAT Processing	Thu 25 Sep
Melbourne	<b>WB 3.3 for System Administrators</b>	Thu 13 Nov
Melbourne	<b>WB 3.3 for System Administrators</b>	Fri 14 Nov
Bendigo	Intermediate WinBEAT Accounting	Tue 9 Sep
Bendigo	Integrating WinBEAT & MS Office	Wed 10 Sep
Ballarat	<b>WB 3.3 for System Administrators</b>	Thu 6 Nov
Ballarat	Advanced WinBEAT Accounting	Fri 7 Nov
Albury-Wod	WB 3.2 for System Administrators	Tue 22 Jul
Albury-Wod	Intro WB Transaction Processing	Wed 23 Jul
TASMANIA		
Launceston	Intro WB Transaction Processing	Tue 26 Aug
Launceston	Advanced WinBEAT Accounting	Wed 27 Aug
Launceston	<b>WB 3.3 for System Administrators</b>	Tue 2 Dec
NEW SOUTH WALES		
Sydney	Intermediate WinBEAT Processing	Wed 6 Aug
Sydney	Integrating WinBEAT & MS Office	Thu 7 Aug
Sydney	<b>WB 3.3 for System Administrators</b>	Wed 19 Nov
Sydney	Advanced WinBEAT Accounting	Thu 20 Nov
Sydney	<b>WB 3.3 for System Administrators</b>	Tue 2 Dec
Canberra	Intro WB Transaction Processing	Tue 16 Sep
Canberra	Intermediate WinBEAT Accounting	Wed 17 Sep
Canberra	Intermediate WinBEAT Processing	Thu 18 Sep

QUEENSLAND		
Brisbane	Integrating WinBEAT & MS Office	Tue 2 Sep
Brisbane	Advanced WinBEAT Accounting	Wed 3 Sep
Brisbane	<b>WB 3.3 for System Administrators</b>	Tue 25 Nov
Brisbane	Intermediate WinBEAT Processing	Wed 26 Nov
Gold Coast	<b>WB 3.3 for System Administrators</b>	Tue 11 Nov
Gold Coast	Intro WB Transaction Processing	Wed 12 Nov
Townsville	Intermediate WinBEAT Accounting	Tue 15 July
Townsville	WB 3.2 for System Administrators	Wed 16 July
NORTHERN TERRITORY		
Darwin	Advanced WinBEAT Accounting	Tue 12 Aug
Darwin	Integrating WinBEAT & MS Office	Wed 13 Aug
SOUTH AUSTRALIA		
Adelaide	Intro WB Transaction Processing	Tue 19 Aug
Adelaide	Intermediate WinBEAT Accounting	Wed 20 Aug
Adelaide	<b>WB 3.3 for System Administrators</b>	Tue 18 Nov
Adelaide	Advanced WinBEAT Accounting	Wed 19 Nov
WESTERN AUSTRALIA		
Perth	Intro WB Transaction Processing	Tue 7 Oct
Perth	Intermediate WinBEAT Accounting	Wed 8 Oct
Perth	Integrating WinBEAT & MS Office	Thu 9 Oct
Perth	Advanced WinBEAT Accounting	Fri 10 Oct
Perth	<b>WB 3.3 for System Administrators</b>	Thu 4 Dec