

Volume 23
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End of Financial year is almost upon us and we have had a busy six months finalising the WinBEAT 3.3 release, attending conferences and working on new functionality and e-commerce solutions.

We have just released the NSW SES levy compliant version of WinBEAT - Version 3.3.23 - to all our clients. The WinBEAT NSW SES Levy Set-up Reference Guide is available for download from our website www.ebix.com.au. This levy is applicable to any fire risk insured in NSW so the Reference Guide will be relevant to our brokers Australia wide where they write business in NSW.

Our WinBEAT End of Financial Year Checklist is also available for download from www.ebix.com.au and will ensure that your End of Year runs smoothly and you have copies of all the June 30 reports required for audit purposes.

We will be providing extended support on Tuesday 30th June until 6:30 pm EST.

On the e-Commerce front, it is pleasing to report that more than 5,000,000 transactions have been processed via Sunrise Exchange this financial year and around 10,000 quotes a day are requested via Sunrise Online Quoting.

iClose Accounting was launched in conjunction with QBE earlier in the year. iClose Accounting automates the settlements process with the Underwriter. We recently confirmed with QBE that the iClose Accounting roll out will be gradual and initially concentrated on areas where greater efficiencies can be achieved.

The second half of 2009 will bring the release of further Ebix e-commerce solutions including **iClose Placements** which allows brokers to obtain and manage quotes for typically negotiated classes of risk. We will be also launching **iClose Policy** with our first underwriter in the coming quarter. Go to [page 3](#) for all the iClose news.

Keep up to date with all the latest news at www.ebix.com.au

Complete your Online Image



How effective is your website?

In the current climate a professional and engaging website is an essential tool to better service your clients.

Ebix Professional Services can custom build a website to suit your business needs and introduce eCommerce functionality, turning your website into a powerful sales and marketing tool.

To transform your online presence contact our Professional Services Team on 1800 331 018 or email sales@ebix.com.au for more information.

WinBEAT  Tips

FOS Wording on Invoices

Following the merger of the Financial Ombudsman Service with Insurance Brokers Disputes Limited on the 1st of January 2009 all IBD members are now members of FOS

FOS has established an Insurance Broking division to consider disputes that were previously considered by IBD which means you will have to update the IBD wording on your WinBEAT Invoice if you have not already done so.

From the **M**aintain menu select **W**ordings - Standard **W**ordings.

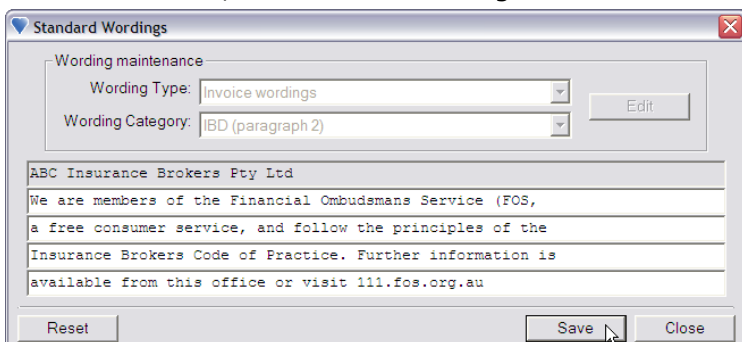
Select Wording Type : **Invoice Wordings**


Wording Category : **IBD (paragraph 2)**

Click 

You will need to amend each line. A wording similar to the following is suggested:

"We are members of the Financial Ombudsman Service (FOS), a free consumer service, and follow the principles of the Insurance Brokers Code of Practice. Further information is available from our office, or visit www.fos.org.au."



Click  to save your changes.

WinBEAT Release 3.3

The WinBEAT Release 3.3 Roll-out was completed in February and most of our users have now upgraded to this new version.

There have been a number of subsequent minor updates so everyone should ensure they have updated WinBEAT to version **3.3.23**. This version is the NSW SES Levy compliant release.

WinBEAT System Administrators can select **H**elp - **D**ownload Latest Version to download the update file if required. All WinBEAT users should also ensure they have read the 3.3 Release Notes - **H**elp What's **N**ew - as there are around 100 enhancements and changes in the 3.3 Release.

WinBEAT Database Services

Did you know that activating the **Database Services** option in your WinBEAT Registration allows you to do a clean-up of your database?

Database Services provides you with the facility to "merge and delete" old or unused underwriters, account managers, associates and associate groups, policy classes and class groups and client groups within your WinBEAT database. This means you can clean up old or redundant entities without impacting the integrity of your Historical Sales Reports.


For example: you may have a number of underwriters that are no longer in use and you do not want users to see them or select them from any Underwriter drop list. Database Services allows the System Administrator to 'merge' the unwanted underwriter onto another live underwriter ensuring historical data is not lost. The unwanted underwriter will then be deleted automatically as part of the process.

Historical Sales reports will retain the historical data so you will still see the original entity on any Historical Sales Report.

WinBEAT Database Services is a registration option and the cost is based on the number of users in your largest ledger. You may use Database Services in any ledger and as many times as you wish once you are registered for it.

You can email winbeat@ebix.com.au to obtain a Database Services Reference Guide and quotation.

WinBEAT Upgrade CD

 As you are aware earlier this year we sent our WinBEAT 3.3 Major Release on CD.

It is quite important that you **keep this CD in a safe place** as you may need to use it throughout the year for such things as:

- installation of new workstations
- re-installation where a computer has crashed and requires re-building
- installation on a new server
- uninstall and reinstall WinBEAT Client

You can download the installation CD from our web site however this is quite time consuming due to the size of the files requiring download, so it is best to ensure the install CD is available.

The logo for 'iClose Update' features the word 'iClose' in a blue, rounded font with a thin blue arc above it, followed by the word 'Update' in a bold, blue, sans-serif font.

What is iClose?

iClose is a comprehensive e-commerce strategy incorporating standards, software products, interfaces and services designed to address all aspects of the broker-insurer relationship. It addresses a range of business processes and provides a complete solution for functions including quotations, referrals, placements, settlements and claims.

Not just a single product or interface, iClose is an end to end business solution. It is the result of an analysis of current available facilities and market requirements as well as research into available technology and standards. iClose will be an evolving solution set that will expand as market requirements change.

Based on a peer to peer messaging architecture, iClose incorporates a series of modules and interfaces that can be implemented individually or in any combination to fill gaps in the e-commerce arena. It provides a secure, cost effective e-commerce platform that compliments existing market facilities such as Sunrise Exchange and Sunrise Online Quoting.

iClose Accounting

In conjunction with QBE we have recently launched our iClose Accounting Module for both WinBEAT and CBS, and soon eGlobal. The iClose Accounting Module automates the settlement process between the Broker and the Underwriter.

iClose Accounting automatically produces settlement (remittance) files in XML format as part of the Underwriter Payments process. These settlement files are forwarded via a secure connection to the Underwriter's system. The broker then pays the underwriter by EFT. This EFT payment triggers the upload of the settlement file into the Underwriter's system and matches policies with payments.

This process saves the Underwriter having to manually process each individual payment and allocate an amount to each outstanding premium.

Our testing phase was successfully completed in May and, over the next few months, QBE will be rolling out iClose Accounting to a wide range of brokers, including the Austbrokers Group.

iClose Placements

Obtaining and managing quotes for typically negotiated classes of risk will become easier when iClose Placements is launched later in the year.

Designed to streamline the quote process, iClose Placements allows multiple quote requests to be generated and sent to a panel of insurers, allowing the broker to manage the responses.

Generating quotes is a straightforward process – relevant risk details are entered into data entry screens which represent a common question set for participating insurers. The interactive referral process allows both parties to provide additional information to refine the quote. Workflow utilities are available to manage responses.

iClose Placements uses the new ACORD industry standards for transmitting quotes and will use the ACORD Australian data standards as the question sets, as these are released. iClose Placements will be fully integrated with WinBEAT complementing existing functionality, which makes quote generation seamless. However, the best news is the cost – once connected to the Ebix iClose environment, there are no costs for submitting quotes or receiving quote responses.

If you would like more information about iClose please email sales@ebix.com.au

Legislative Update

DOFI Reporting Update

After DOFI reporting deadlines were set in 2008 there has been very little further activity from the Federal Government in this area.

We have had no updates or advice from ASIC further detailing Reporting requirements and therefore have not been able to develop reports in our three broking systems.

NSW Emergency Services Levy Update










The NSW Government have finalised the new State Emergency Services Levy on building insurance premiums. We have recently released WinBEAT Version 3.3.23 which is the NSW SES Levy compliant version.

You can download the "WinBEAT NSW SES Levy Set-up Reference Guide" from www.ebix.com.au

Sunrise News

The Sunrise Exchange range of products continues to grow and over the last year we have added **thirteen new products** to Sunrise Exchange. We now have **forty-six products** across nine insurers and twenty classes of business, with more new products coming on line in the next six months.

Sunrise Products June 2009

									
Business Pack	X		X	X	X		X	X	X
Commercial Motor	X			X			X		
Contract Works							X		
Farm Motor				X					
Farm Pack				X			X		
Heavy Motor						X			
Home	X	X	X	X	X		X	X	X
Information Communication							X		
Landlords	X		X	X	X				
Medical Malpractice							X		
Motor	X			X			X	X	
Motor Trades	X								
Office Pack	X						X		
Pleasure Craft	X						X		
Professional Indemnity							X		
Retail Pack	X								
Strata				X					
Taxi									X
Trades Pack	X						X		X
Workers Compensation							X		

Sunrise Templates

Sunrise Templates takes the plain text sent by the insurer and reformats it using rich text format. If you utilise Sunrise Templates it will no longer be necessary for your staff to re-key or reformat insurer text in order to make your invoices look presentable.

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 you can go to our website: www.ebix.com.au or email templates@ebix.com.au

WinBEAT Training

WinBEAT Training 2009

Your WinBEAT subscription includes quarterly "Training Credits" which can be used in a variety of ways:

- Scheduled Courses which we run Australia-wide
- WebEx Customised Training – course modules are customised to suit your specific requirements
- On-site training and consulting – fully tailored to your business needs
- WinBEAT Operational Review – learn how to get maximum benefit from WinBEAT for your business

Not only do you enhance skills and increase productivity through training but you and your staff can earn CIP points for any WinBEAT training that you do. To find out your training credit status or obtain more information simply email: wbtraining@ebix.com.au

Note that our **Integrating WinBEAT and MS Office** course will now incorporate both Office 2003 and 2007.

Course Dates June – November 2009

VICTORIA		
Melbourne	Intro WB Transaction Processing	Tue 16 Jun
Melbourne	Intermediate WinBEAT Accounting	Wed 17 Jun
Melbourne	Intro WB Transaction Processing	Fri 10 Jul
Melbourne	Advanced WinBEAT Accounting	Tue 21 July
Melbourne	Intermediate WinBEAT Processing	Thu 13 Aug
Melbourne	Integrating WinBEAT & MS Office*	Thu 20 Aug
Melbourne	WB 3.3 for System Administrators	Fri 21 Aug
Melbourne	Intro WB Transaction Processing	Thu 24 Sept
Melbourne	Intermediate WinBEAT Accounting	Thu 15 Oct
Melbourne	Advanced WinBEAT Accounting	Fri 16 Oct
Melbourne	Integrating WinBEAT & MS Office*	Thu 5 Nov
NEW SOUTH WALES		
Sydney	Intro WB Transaction Processing	Wed 8 Jul
Sydney	Intermediate WinBEAT Processing	Tue 18 Aug
Sydney	WB 3.3 for System Administrators	Wed 19 Aug
Sydney	Intermediate WinBEAT Accounting	Tue 20 Oct
Sydney	Integrating WinBEAT & MS Office*	Wed 21 Oct
Sydney	Intermediate WinBEAT Processing	Tue 24 Nov
Sydney	Advanced WinBEAT Accounting	Wed 25 Nov
Sydney	Intro WB Transaction Processing	Thu 26 Nov
Albury	Intermediate WinBEAT Processing	Wed 5 Aug
Albury	Advanced WinBEAT Accounting	Thu 6 Aug
Newcastle	Intermediate WinBEAT Processing	Tue 11 Aug
Newcastle	Integrating WinBEAT & MS Office*	Wed 12 Aug
Coffs Harb.	TBA	Tue 27 Oct
Coffs Harb.	TBA	Wed 28 Oct
TASMANIA		
Launceston	Intermediate WinBEAT Processing	Wed 26 Aug
Launceston	Integrating WinBEAT & MS Office	Thu 27 Aug

QUEENSLAND		
Brisbane	Intermediate WinBEAT Processing	Tue 8 Sept
Brisbane	WB 3.3 for System Administrators	Wed 9 Sept
Brisbane	Integrating WinBEAT & MS Office*	Thu 10 Sept
Brisbane	Intermediate WinBEAT Accounting	Tue 17 Nov
Brisbane	Advanced WinBEAT Accounting	Wed 18 Nov
Brisbane	Intro WB Transaction Processing	Thu 19 Nov
Gold Coast	Advanced WinBEAT Accounting	Tue 13 Oct
Gold Coast	Integrating WinBEAT & MS Office*	Wed 14 Oct
Townsville	Intermediate WinBEAT Processing	Wed 22 Jul
Townsville	Integrating WinBEAT & MS Office*	Thu 23 Jul
Cairns	WB 3.3 for System Administrators	Tue 19 May
Cairns	Intro WB Transaction Processing	Wed 20 May
Cairns	Intermediate WinBEAT Processing	Thu 21 May
NORTHERN TERRITORY		
Darwin	TBA	Tue 25 Aug
Darwin	TBA	Wed 26 Aug
SOUTH AUSTRALIA		
Adelaide	Advanced WinBEAT Accounting	Tue 15 Sep
Adelaide	Integrating WinBEAT & MS Office*	Wed 16 Sep
WESTERN AUSTRALIA		
Perth	Intermediate WinBEAT Accounting	Tue 14 Jul
Perth	Advanced WinBEAT Accounting	Wed 15 Jul
Perth	Integrating WinBEAT & MS Office*	Thu 16 Jul
Perth	Intro WB Transaction Processing	Tue 6 Oct
Perth	Intermediate WinBEAT Processing	Wed 7 Oct
Perth	Integrating WinBEAT & MS Office*	Thu 8 Oct

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* For both Microsoft Office 2003 and 2007