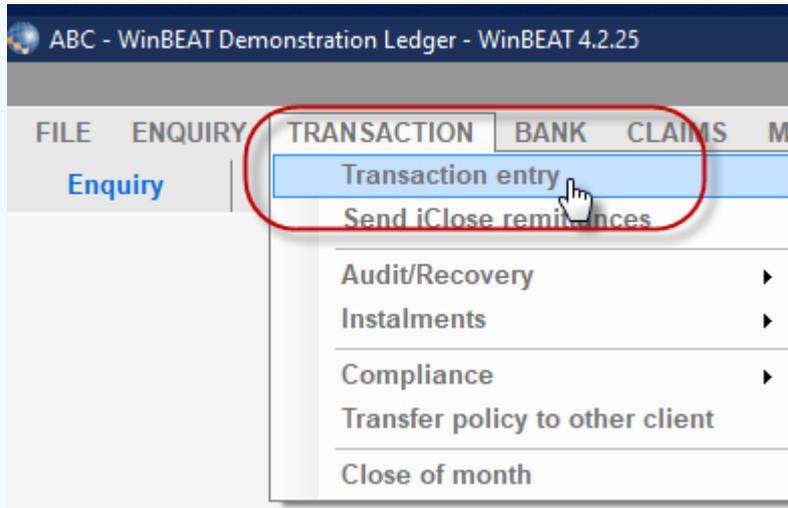


Winbeat – How to obtain Certificate of Currency

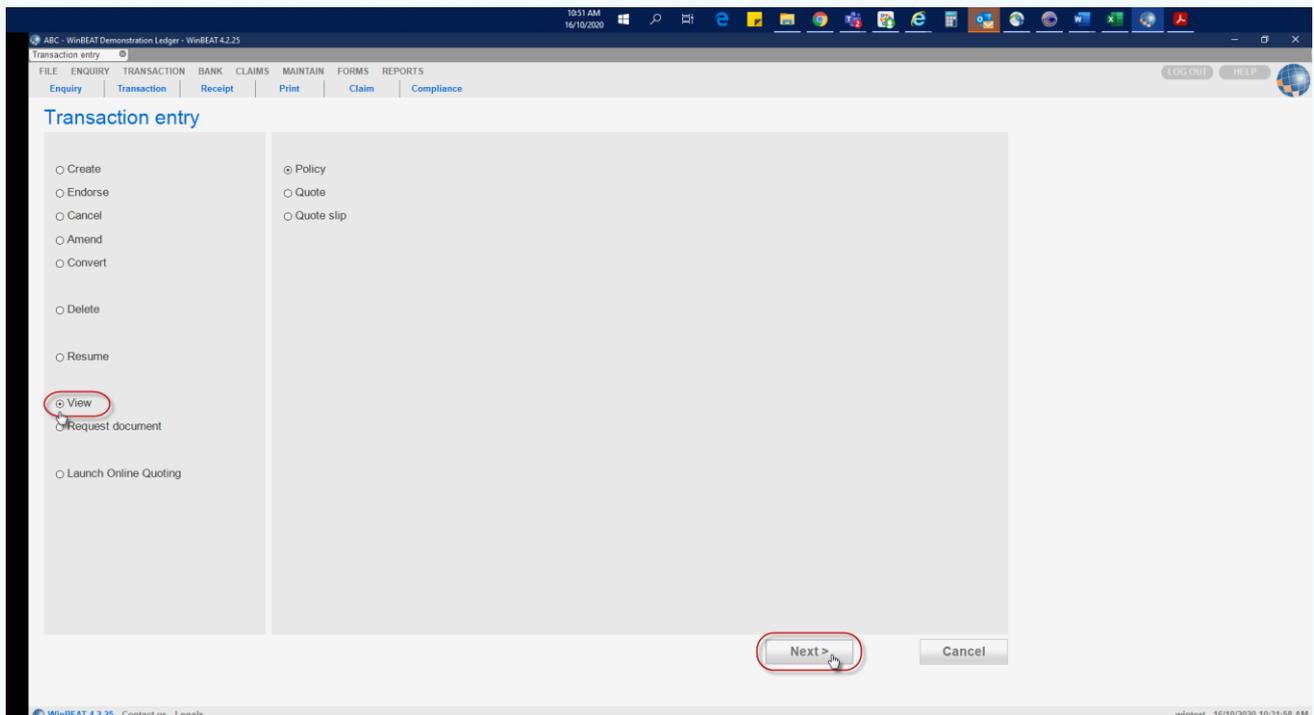
Stage 1. Log into Winbeat

- Log into Winbeat
- Select **Transaction** > **Transaction Entry**



Stage 2. Transaction entry

- Select **View**
- Click **Next**



Stage 3. Select Policy

- From the Client drop down box, select the client record
- Click **Show**, to bring up policy results
- Select the **policy** required
- Click **Next**

Transaction **View policy**

Client **CLOUGH** Search

Telephone
Email
Primary contact
Contact phone
Contact mobile
Activity

839 Collins Street
DOCKLANDS VIC 3001

Client group **Not Applicable**
Account manager **Office Account**
Agent **No Associate**
Balance **\$116,752.19**
Unallocated **\$0.00**
Outstanding **\$116,752.19**
Compliance type **Unknown**

Policies
Show All Live Outstanding

Class	Underwriter	EDI	Policy number	Inception	Expiry	Activity	Premium	Balance	
Business	QBE	S	141	BPK	8/05/2020	6/05/2021	Active	\$1,001.62	\$1,001.62
Business	QBE	S	141	BPK	11/05/2020	11/05/2021	Active	\$2,458.29	\$2,458.29
Business	QBE	S	141	BPK	24/06/2020	24/06/2021	Active	\$2,568.78	\$2,568.78
Private Motor	QBE	S	141	MPA	18/10/2019	18/10/2020	Active	\$296.49	\$296.49
Commercial Motor	QBE	S	141	MVA	16/07/2020	16/07/2021	Active	\$511.98	\$511.98
Business	QBE	S	141	BPK	23/09/2020	23/09/2021	Active	\$625.89	\$625.89
Business	QBE	S	141	BPK	25/09/2020	25/09/2021	Active	\$5,200.56	\$5,200.56
Business	QBE	S	141	BPK	25/09/2020	25/09/2021	Active	\$7,931.98	\$7,931.98
Business	QBE	S	141	BPK	13/10/2020	13/10/2021	Active	\$2,650.63	\$2,650.63
Business	QBE	S	141	BPK	13/10/2020	13/10/2021	Active	\$2,650.63	\$2,650.63
Business	QBE	S	141	BPK	13/10/2020	13/10/2021	Active	\$2,650.63	\$2,650.63
Business	QBE	S	141	BPK	13/10/2020	13/10/2021	Active	\$2,650.63	\$2,650.63
Business	QBE	S	141	BPK	13/10/2020	13/10/2021	Active	\$2,650.63	\$2,650.63

Click Next < Back Next > Cancel

Stage 4. Select Version

- Click **Next**

Transaction **View policy** EDI **Sunrise**

Versions

PolicyRef	Status	Static
QBEUAT-7932-1-1	N/B	CLS

Click Next < Back Next > Cancel

Stage 5. Policy & Customer details

- Click on the **Premium** tab

Policy & customer details

Account: 41
Inception: 13/10/2020 • Effective: 13/10/2020 • Expiry: 13/10/2021

Policy Customer History **Premium** Payment

Policy Summary
Here is a summary of the situations and risks you've added.

Situations	Associated Risks	Status	Premium
525420 - FLORIST, RETAIL, OPERATION 123 FREMANTLE WA 6160	Property / Business Interruption Liability		\$2,226.25 \$424.38

Abandon Options Next

WinBEAT 4.2.25 Contact us Legals wintext - 16/10/2020 10:31:58 AM

Stage 6. Premium Tab

- Click on **Options**
- Then **Documents**

Policy & customer details

Policy Customer History **Premium** Payment

Policy Premium Breakdown

	FAP	Premium	Levies	S/Duty	GST	Total	Comm
123 FREMANTLE WA 6160							
Property	\$1,714.06	\$1,714.06	\$0.00	\$188.54	\$171.41	\$2,074.01	\$385.66
Fire Terrorism	\$125.82	\$125.82	\$0.00	\$13.84	\$12.58	\$152.24	\$28.31
Liability	\$350.73	\$350.73	\$0.00	\$38.58	\$35.07	\$424.38	\$78.91
Intermediary Fee (incl.GST)	-	-	-	-	-	\$0.00	-
Grand Total	\$2,190.61	\$2,190.61	\$0.00	\$240.96	\$219.06	\$2,650.63	\$492.88

Underwriting Information

Premium Summary

Annual Premium	\$2,650.63
Commission	\$492.88
GST on Commission	\$49.29
Net Premium	\$2,108.46

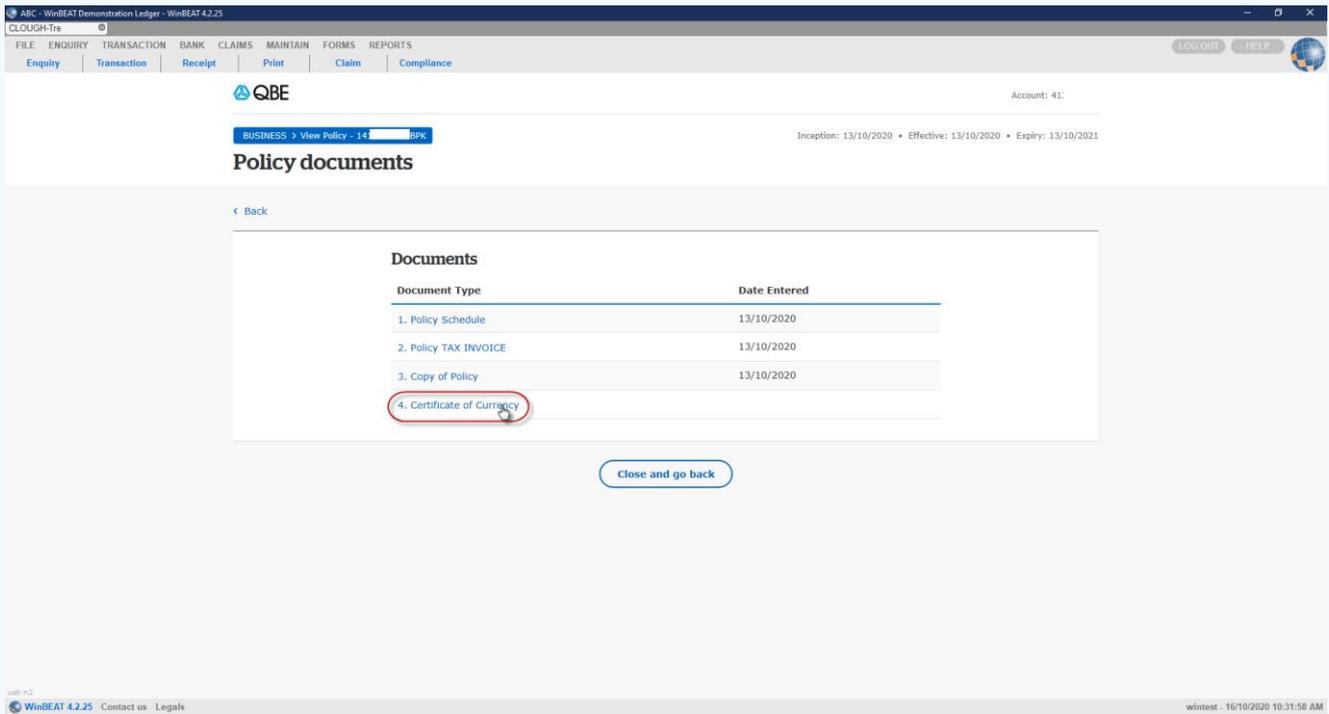
Documents
Confirmation of What You Told Us

Back Abandon **Options** Complete Next

WinBEAT 4.2.25 Contact us Legals wintext - 16/10/2020 10:31:58 AM

Stage 7. Policy Documents

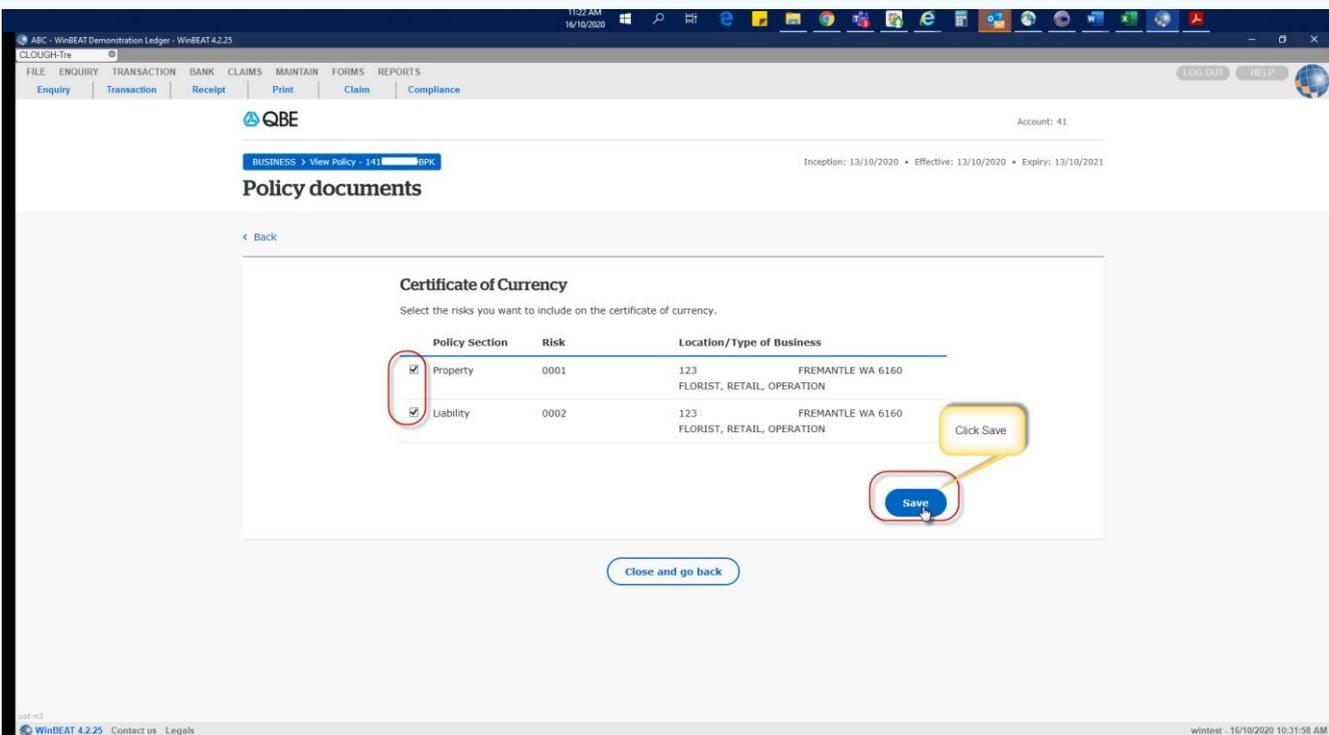
- Select Item 4 > **Certificate of Currency**



Stage 8. Policy Section

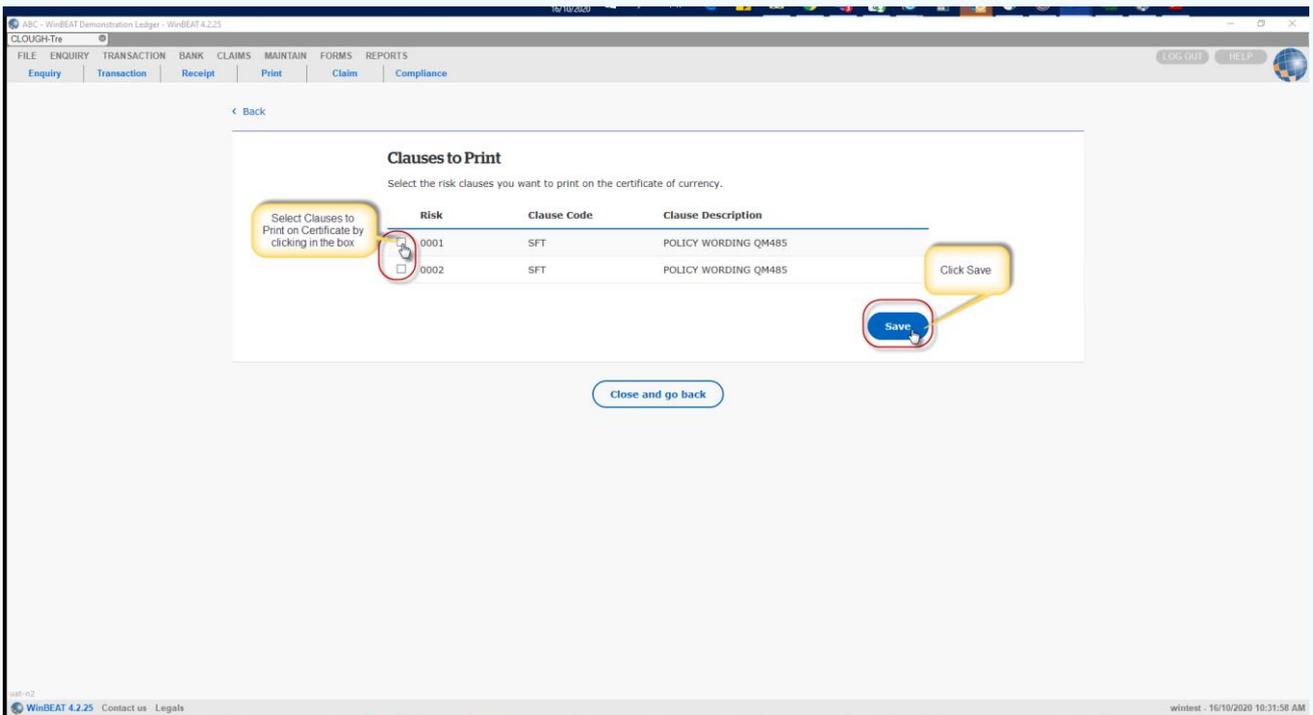
- All Risks will be selected
- Click **Save**

NOTE: If policy has multiple locations, you can only select Risks from one location for a Certificate of Currency



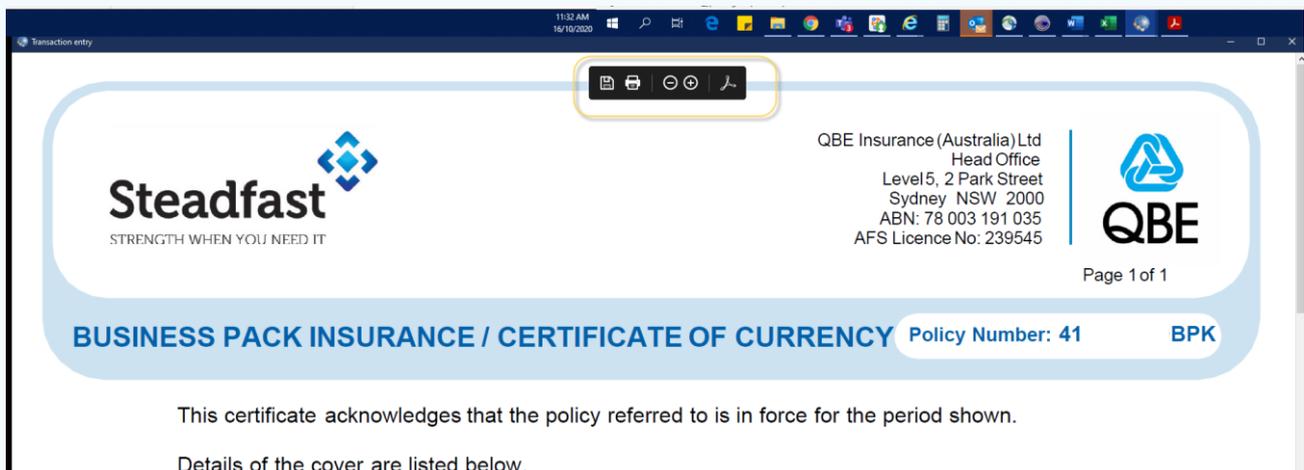
Stage 9. Clauses to Print

- Select one or more clauses to Print on the Certificate of Currency by clicking in the box alongside the required clause
- Click **Save**



Stage 10. Certificate of Currency

- The Certificate of Currency should now open for you as a PDF Document
- Click  to Save document
- Click  to Print document
- Click  to PDF document. This function will allow you to automatically email the Certificate of Currency or Save the document as a PDF



Stage 11. Close and go Back

- Once you Close the PDF Document you will be taken back to your Winbeat,
- Click **Close and go back**

The screenshot shows the WinBEAT web application interface. At the top, there is a navigation menu with options like FILE, ENQUIRY, TRANSACTION, BANK, CLAIMS, MAINTAIN, FORMS, and REPORTS. Below this, the QBE logo and account number (413314093) are visible. The main content area is titled 'Policy documents' and includes a 'Documents' table. A callout box with a yellow background and a red border points to a button labeled 'Close and go back'. The callout text reads: 'After you close the PDF Document, you need to click Close and Go back'.

Document Type	Date Entered
1. Policy Schedule	13/10/2020
2. Policy TAX INVOICE	13/10/2020
3. Copy of Policy	13/10/2020
4. Certificate of Currency	13/10/2020