

writepay instalment billing reference card

Including an intermediary fee with writepay

To include an intermediary fee in the premium:

- > Go to the Premium screen within Sunrise.
- > Click on the Edit button.
- > Enter a dollar amount for the intermediary fee including GST, and click on the Save button.
- > The intermediary fee will now be included in the total premium.

Premium		Payment				
P	Premium	FSL	S/Duty	GST	Total	Comm
0	\$410.20	\$90.24	\$49.54	\$50.04	\$600.02	\$92.29
0	\$53.00	\$0.00	\$5.24	\$5.30	\$63.54	\$11.92
					\$0.00	edit

Note: An intermediary fee can only be entered during a Quote, New Business, or Renewal transaction.

Setting up writepay: the payment screen

The premium instalment option can be set up from the Sunrise / c.change **Payment** screen.

- 1 Select payment method.
Options: Credit Card or Bank Account
- 2 Select the payment period.
Options: Annual or Monthly
- 3 Enter the deduction date.
- 4 Complete the required Bank Account / Credit Card details.

Click on **Next** to continue.

Authorising premium instalment deductions

Method 1: Complete the DDR Online

- > Click on the Complete DDR button. If you agree to authorise the payment, client on the I AGREE button.
- > Provide the client with a copy of the Direct Debit Service Agreement.

Method 2: Complete the Paper DDR Form

Click on Options, and then View Authorisation Form.

- > Print out the Direct Debit Request (DDR) form for the client to complete.
- > Print out the Direct Debit Service Agreement to hand to the client.

The client should return the form to the intermediary within 7 days.

~~Please forward you client's DDR form to your local QBE office.~~

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Instalment dishonours

In the event of a premium instalment dishonouring, QBE will issue within 24 hours a standard dishonour letter to your customer care of your office.

c.change reporting (managed by Marsh-Landmark Accounts Administrator)

To view writepay reports and your Statement of Account:

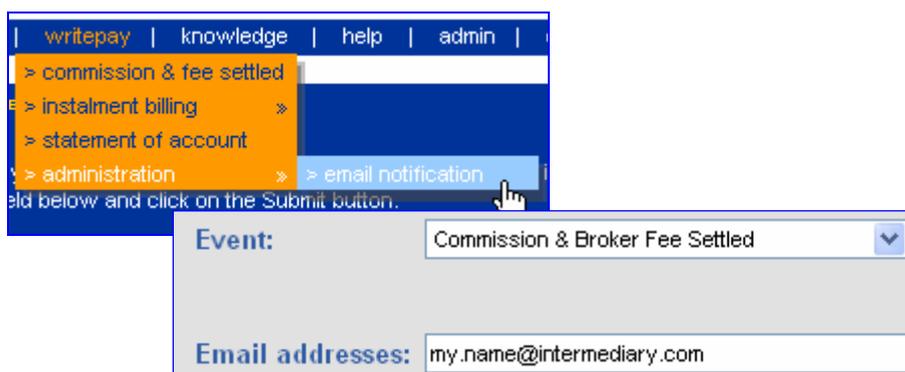
- > Log into c.change using your c.change user id and password.
- > Select the required report from the writepay menu.
- > Select the account you wish to view.
- > Open the report by selecting the appropriate month.



Staying informed by e-mail

To set up or edit an e-mail update:

- > Log into c.change using your c.change user id and password.
- > From the writepay menu, select **administration** and then **e-mail notification**.
- > Select the event you would like to be kept informed about.
- > Click on the **Edit** button and enter the e-mail address that is to receive the notification.
- > Click on the **Save** button to save these changes.



Note: If you would like to enter several e-mail addresses simply separate these with a comma within the "Email addresses" box.

Monthly commission settlement

WinBeat

- > To update WinBeat, go to the **Sunrise** top menu and select **Sunrise Instalments** and **Reconciliation**.
- > A login prompt will be displayed. Enter your c.change username and password to access the update.
- > If a file is available, it will automatically download and update WinBeat to reflect Fee and Commission payment made to the intermediary's bank account.
- > To view a report of the Intermediary Fee and Commission payment settled, go to the **Sunrise** top menu, select **Sunrise Instalments** followed by **Reports and Instalments Processed**.

CBS

- > To update CBS go to the **Accounting** main menu, select the **Banking** Menu then select **Process QBE Direct Billed Banking**.
 - > Select the QBE Client Code.
 - > Enter the reconciliation file's directory path and file name under Import File Name.
 - > Select F7 to proceed.
- Note:** It is recommended that the program is initially run without update (Update Flag set as "N") to check for errors.

Brokers Advantage

- > To update Brokers Advantage go to **Broking & Claims** on the main menu, select **Data Entry** and **Automatic Settlements**.
- > Use **F3** to list the reconciliation files in the directory. Select the file and click on **Accept** and **Save**.
- > Select **Settlement Import Errors** from the menu. Input today's date to check for errors.
- > Select **Settlements Completed** from the menu. A report will display all the settlements completed.