



November 3, 2004

To: The Broker's Workstation Users

Dear Valued Client:

Re: The Broker's Workstation – Important Releases and Changes

Custom Software Solutions is pleased to report the release of the following new features/tools within The Broker's Workstation (TBW).

Driver Record Override:

Two new tabs have been added to the IQ interface.


1. Driver Override Tab - This allows the user to manually override the following:
 - Driver Class
 - Driver Record (Separate fields for TPL & Collision)
2. Rate Group Override Tab - This allows the user to override the Rate Group for the vehicle. The absence of a value in these fields will result in IQ determining the appropriate Class, Record or Rate Group based on data.

Custom Software
SOLUTIONS INC.

297 Nelson St. W. P.O. Box 639 Virden, MB, R0M 2C0
Tel: 204-748-4800, 1-888-291-3588 Fax: 204-748-4806
www.cssionline.com

Coverage Item Properties - Private Passenger Vehicle

Is Active |
 Vehicle Details |
 General Details |
 Location Factors |
 Protection |
 Type Of Coverage/Deductible |
 Lessor, Lienholder, Co-Owner |
 Vehicle Endorsements |
 Liability |
 Driver Record Overrides |
 Rate Group Overrides

 Select the appropriate 'Rate Groups' for this coverage item.
 Hint: Type Ctrl+A to copy the current value to all companies.

= Used for Rating
 = Used for the Application


	Rate Group (AB)	Rate Group (Coll)	Rate Group (Comp)	Rate Group (Comb)
AXA				25
Allianz	25	27	23	
Aviva	25	27	23	
Dominion	25	27	23	
Economical		27	23	
Facility				25
ING Insurance	25	27	23	
Optimum West	25	27	23	
Peace Hills		27	23	
Portage Mutual	25	27	23	
Royal SunAlliance				25
Sovereign	25	27	23	
The Citadel	25	27	23	
Wawanesa	25	27	23	

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 Liability |
 Driver Record Overrides |
 Rate Group Overrides

 Select the appropriate 'Driver Record', 'Driver Class' for this coverage item.
 Hint: Type Ctrl+A to copy the current value to all companies.

= Used for Rating
 = Used for the Application

	Driver Class	Driver Record (Coll)	Driver Record (TPL)
AXA	1	6	6
Allianz	1	6	6
Aviva	1	6	6
Dominion	1	6	6
Economical	1	6	6
Facility	1	5	5
ING Insurance	1	6	6
Optimum West	1	6	6
Peace Hills	1	6	6
Portage Mutual	1	6	6
Royal SunAlliance	1	6	6
Sovereign	1	6	6
The Citadel	1	6	6
Wawanesa	1	6	6

Type Of VICC Rating:

A new field has been added on the "Vehicle Details" tab named "Type of Rating". Previously IQ used the VICC rating method only. This will allow the user to also rate by purchase price, if appropriate.

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Continuously Insured Since:

We have changed the way we collect data on the "Person Screen". IQ now forces the user to indicate if previous/current insurance exists and if so how long has it been in force. This will prevent auto rating issues caused when users ignore the field.

Excluded Drivers:

Provides the ability to add people to the vehicle without the need to connect them to a vehicle.

Liability Questions:

We have now added the ability to answer CSIO application liability questions into the IQ interface.

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Please run the TBW Remote Update Utility to access these changes. For assistance in using these new features, please contact our Support Team at 1-888-291-3588.

Please share this information with all TBW users in your office(s) and thank you for using TBW.

Yours truly,

Custom Software Solutions Inc.

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