



June 15, 2005

To: The Broker's Workstation Users

Dear Valued Client:

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

Custom Software Solutions Inc. (CSSI) is pleased to announce the release of the following enhancements and new features to its The Broker's Workstation product.

New Procedure for New Business Applications and Producer Assignment:

After a CSR has completed rating and underwriting a new client through Intelliquote (IQ), IQ will force the CSR to assign a producer to the Folder, prior to allowing the completion of the application. This will prevent any automatic abeyances created in the I-Biz upload process to Wawanesa, ING and future I-Biz companies from being assigned to the folder vs. a producer.

New "CSIO Carrier" Field:

There is a new field that will appear under Lists/Insurance Companies that is titled "CSIO Carrier". The user needs to input this field to match the free form text name that was entered for a given Insurance Company. This is used for XML conversion when uploading to the ING Savers Website.

Custom Software
SOLUTIONS INC.

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Insurance Companies - Address Not Validated

Please enter Insurance Company details below.

Company Name: Rating Engine:

Accounting Code: EDI: CSIO: Spool: Servicing Carrier:

CSIO Carrier:

Branch Name:

PCode: Override Address Validation

Street #: Street Name: Street Type: Direction: Suite:

City/Prov: PCode:

Country: Gen Delivery:

Add. Address Info: PO Box:

Rte Type: Rte #: Inst Type: Inst Name:

Phone 1 & 2 / Fax:

Contact/EDI Email:

Contact 1/2:

Agency:

Branch:

Department:

Broker Numbers: Set as Default

Enhanced Content of Client Folder Receipts:

Printed client folder receipts now report more details of the transactions that are allocated to the subject receipt. For each policy transaction item allocated to close the receipt, the receipt will print the transaction type, effective date, insurance company, transaction description including a policy number, and the amount allocated. For other transaction types that are allocated to close the receipt, the printed receipt will detail the transaction type, effective date, transaction description and the amount allocated. In the event that the receipt amount is not fully allocated, any unallocated balance will be presented as a "Payment on Account". The sum of the allocation details provided plus the remaining payment on account will then equal the total of the receipt.

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.

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Yours truly,

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