



March 21, 2006

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 (TBW) product.

1. Claims

- **Multiple Third Parties** – when entering a claim using the claim report tool the user can now add multiple third parties. In the past the report was limited to only one third party.
- **New Claim on “other” Policy** – A user can now drop a claim report document onto a policy with a policy description type of “other”.
- **Full Intelliquote (IQ) Claim** - The user now has the ability to create/edit/delete claims while working offline or via IQ using the full and express claim wizards. This functionality will also allow the user to select whether or not they want a document created for the claim when creating or editing via Folder Details and IQ. The user can do this by selecting or deselecting a ‘Create Document’ check box while in the claim wizard.
- **Additional Driver Description Selections** – The user can now select “unknown driver” and “no driver” within the claim report.
- **Expandable Claim Application** - If a claim contains more data than the application can hold, such as three or more Claimants, the program now indicates that the data is in an additional Schedule A. The user can add all the required data in Schedule A.

- 2. Vehicle Substitutions** – In the past TBW had no functionality for changing a Personal Passenger Vehicles (PPV) to a Commercial Vehicle or Vice Versa. The only way a user could accomplish this was to remove the vehicle and then add it back with the changes. The user was forced to reassign/add back all driver/claim/Leinholder/endorsement information. The program now allows for this change to be made. On the “Optional Coverages” window in IQ there is a “Convert Auto” button. If the user has highlighted a Commercial Vehicle, PPV, Commercial Trailer, or Private Trailer and clicks the

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

“Convert Auto” button they will be prompted with a conversion message. In the example below a Commercial Vehicle was selected for conversion to PPV.

Example:

```
-----
Attention
-----
This Commercial Vehicle will be converted to a Private Passenger
Vehicle.
Are you sure you want to continue?
-----
Yes NO
-----
```

If the user selects “Yes” the program clears Region and MidTerm Change Values, retains Mortgage/LeinHolder information, all coverages (endorsements/extension), and all Primary/Occasional/Excluded Drivers.

When complete the user will receive the following message...

```
-----
Attention
-----
Successfully converted Commercial Vehicle to Private Passenger
Vehicle.
Please edit this item and add any missing information.
-----
OK
-----
```

- 3. Critical Abeyances and I-Biz Sequencing** – Critical Abeyances are now created by the system when there are premium matching problems, status changes, and sequencing problems with I-Biz documents. Users **can not** manually create a critical abeyance. On TBW Login or Shut Down the program will now check if there are any critical abeyances for the user. If there are critical abeyances that are not marked as done for this user they will be asked if they want to view them. If yes, the user is presented with the regular abeyance screen. This screen will show all critical abeyances IN RED. All controls are disabled except for the OK and print buttons. The user can double click a critical abeyance to view details, change the details, mark as done but they can not delete the abeyance.

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.

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