October 2, 2007

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.
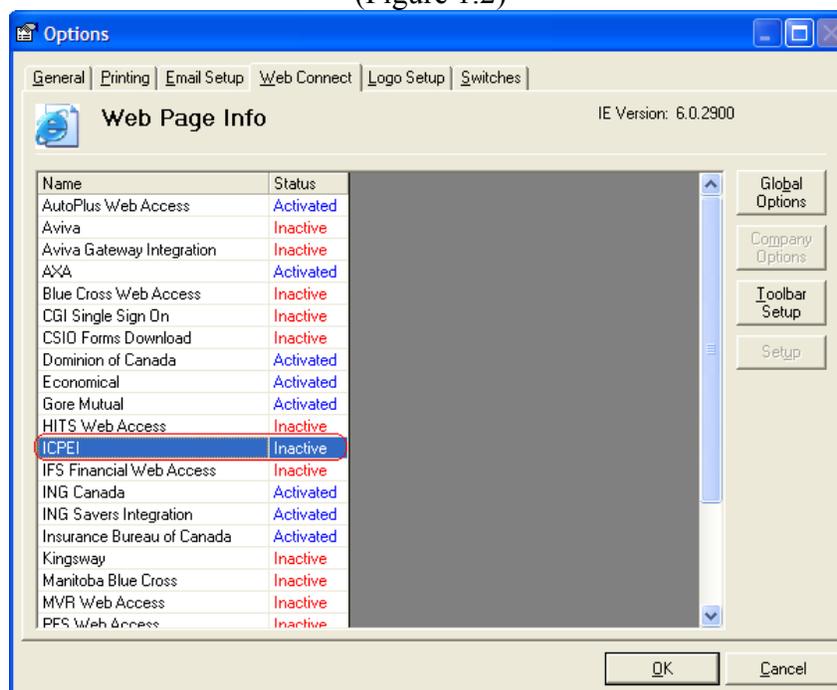
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1.   Webconnect ICPEI :

The following new Webconnect ICPEI is now available to all users. To enable this new webconnect setup the user rights for Webconnect-ICPEI (Figure 1.1), then proceed to webconnect options to enable (Figure 1.2).

(Figure 1.1)

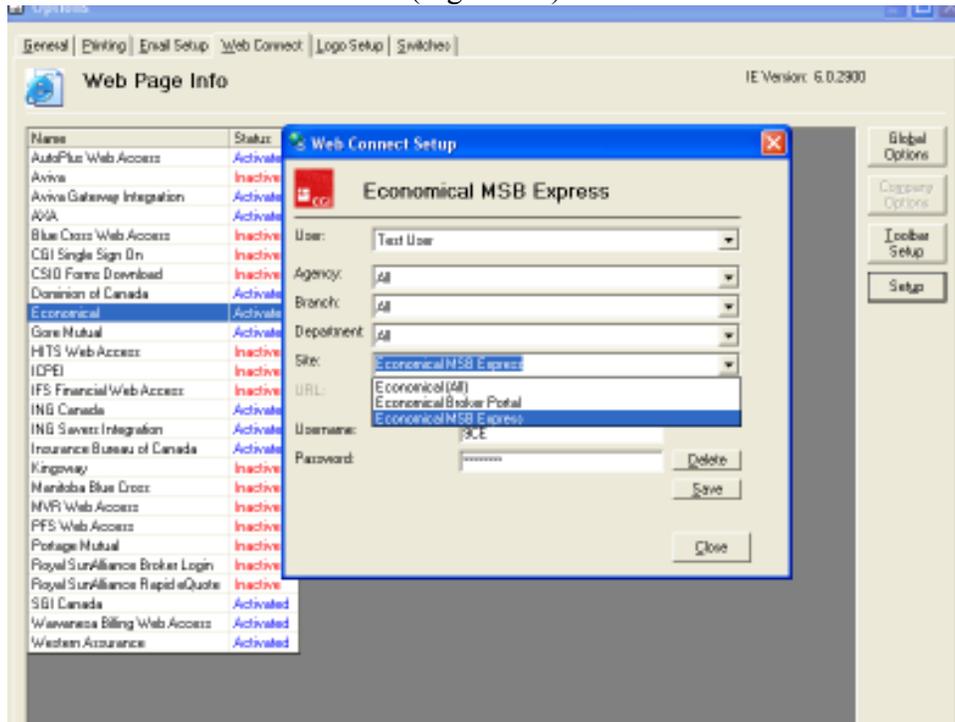|	1	2	3	4	5	6
WebConnect - Dominion of Canada	☐	☐	☐	☐	☐	☐
WebConnect - Economical	☐	☐	☐	☐	☐	☐
WebConnect - Gore Mutual	☐	☐	☐	☐	☐	☐
WebConnect - HITS	☑	☑	☑	☑	☑	☑
WebConnect - ICPEI	☑	☑	☑	☑	☑	☑
WebConnect - IFS	☑	☑	☑	☑	☑	☑
WebConnect - ING Canada	☐	☐	☐	☐	☐	☐

(Figure 1.2)

2.   MSB Express Webconnect (Only Economical Brokers) :

The following new Webconnect MSBExpress is now available to all Economical Brokers. To enable this new webconnect, setup user rights for Webconnect-Economical (Figure 2.1) and then proceed to webconnect options to enable. (Figure 2.2)

(Figure 2.1)

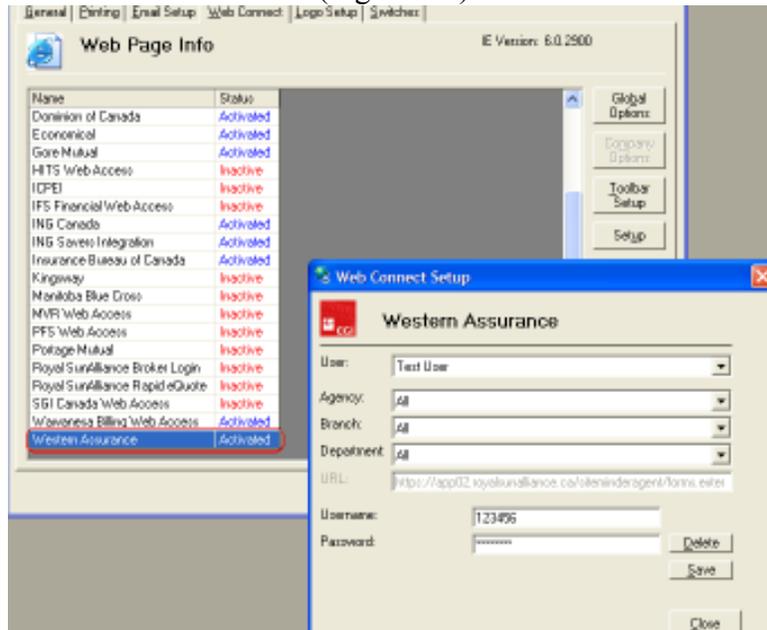|	1	2	3	4	5	6
WebConnect - Blue Cross	☑	☑	☑	☑	☑	☑
WebConnect - CGI (Single Sign On)	☑	☑	☑	☑	☑	☑
WebConnect - CSIO	☑	☑	☑	☑	☑	☑
WebConnect - Dominion of Canada	☑	☑	☑	☑	☑	☑
WebConnect - Economical	☑	☑	☑	☑	☑	☑
WebConnect - Gore Mutual	☑	☑	☑	☑	☑	☑
WebConnect - HITS	☑	☑	☑	☑	☑	☑

(Figure 2.2)

3. Webconnect – Western Assurance:

The following new Webconnect Western Assurance is now available to all users. To enable this new webconnect, setup user rights for Webconnect-Western Assurance (Figure 3.1), then proceed to webconnect options to enable (Figure 3.2).

(Figure 3.1)

(Figure 3.2)

4.   New SGI Webconnect options:

The following new options are now available with the Webconnect- SGI option: Homepage, AutoFund, Forms Download, and Policy lookup (Figure 4.1). To enable Webconnect –SGI if not already setup, user needs to setup user rights for Webconnect- SGI (Figure 4.2) and then proceed to webconnect options to enable (Figure 4.3)
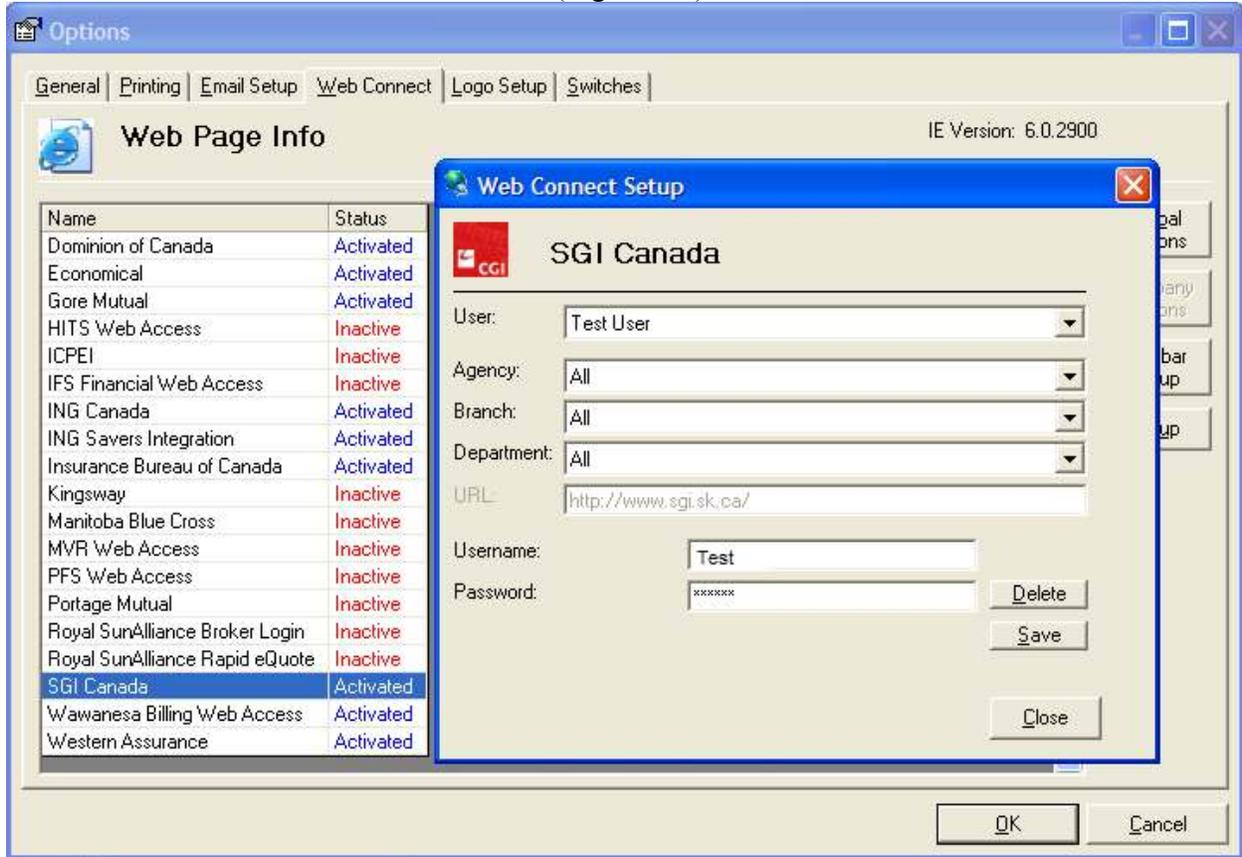
(Figure 4.1)

(Figure 4.2)

(Figure 4.3)

5.   Receipt Print & Post:

Now when a new receipt is created on a client ledger card, the user has the option of printing the receipt before posting it. Once the print & post option is selected the receipt will print a copy an also post at the same time. This feature works the same as on the GL Receipt on the Accounting side of TBW. (Figure 5.1)

(Figure 5.1)

6.   Automatic Post of Journal Entry after Print:

When creating a new GL Journal Entry, if a user prints the Journal Entry before posting, it will print and post at the same time. This works the same as on Receipts and Cheques. (Figure 6.1)

(Figure 6.1)

7.   Client Folder Ledger Card – Addition of Data Columns:

To access the new custom items we have provided a "Columns" button in the lower left corner of the ledger card form. This button will not be shown if the Open Item or Reconciliation views are selected.

When the 'Columns' button is clicked, a form will open listing all the available columns along with a check box for each. The default display fields will be checked and the new fields will not. The user will be free to select and deselect any field they wish to show or hide. (Figure 7.1)
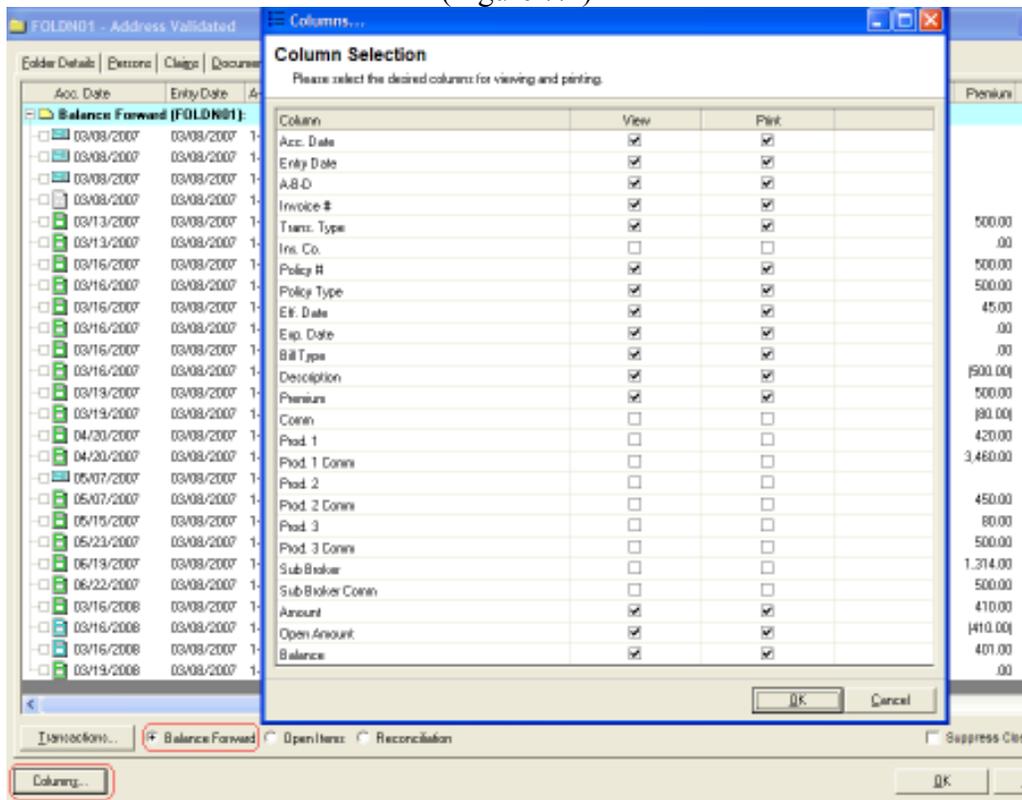
Printed Output:

The printed output of the ledger card will now depend on what the user has customized there columns to.
In the columns customizing window users have the option of selecting to view a certain column as well as printing that column if desired.

(Figure 7.1)

# 8. Multiple Transactions on single Invoice:

a) Enabling and Configuring

The placing of multiple transactions on a single printed document should be a user selectable option. The option should be placed on the Invoices tab of Demographics (Figure 8.1) using a check box labeled "Print multiple transactions on a single invoice".
If the enable option above is checked, a set of radio buttons will become enabled for selection below. The options will be:
- Group all items
- Group all items of same policy number

(Figure 8.1)
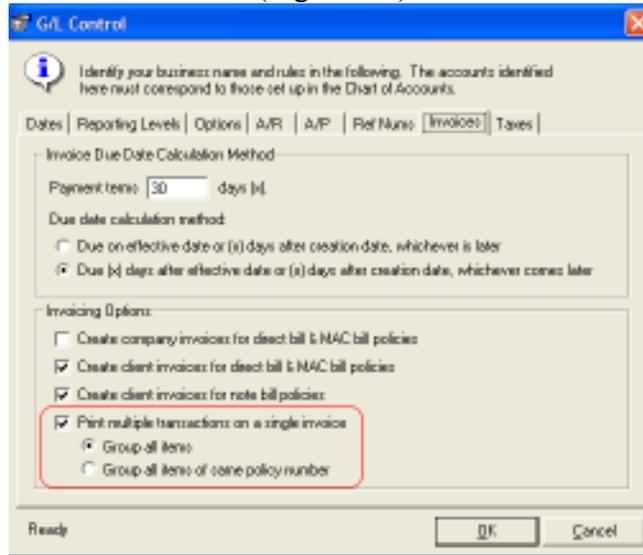
b) Printing Invoices

If grouping is enabled, the system will evaluate the transactions selected for printing and determine the existence of any items to be grouped based on the settings. On the Print command, it will print the individual charges as usual and the grouped items on a single invoice document.

The appearance of an invoice containing multiple items is illustrated below. (Figure 8.2)

(Figure 8.2)
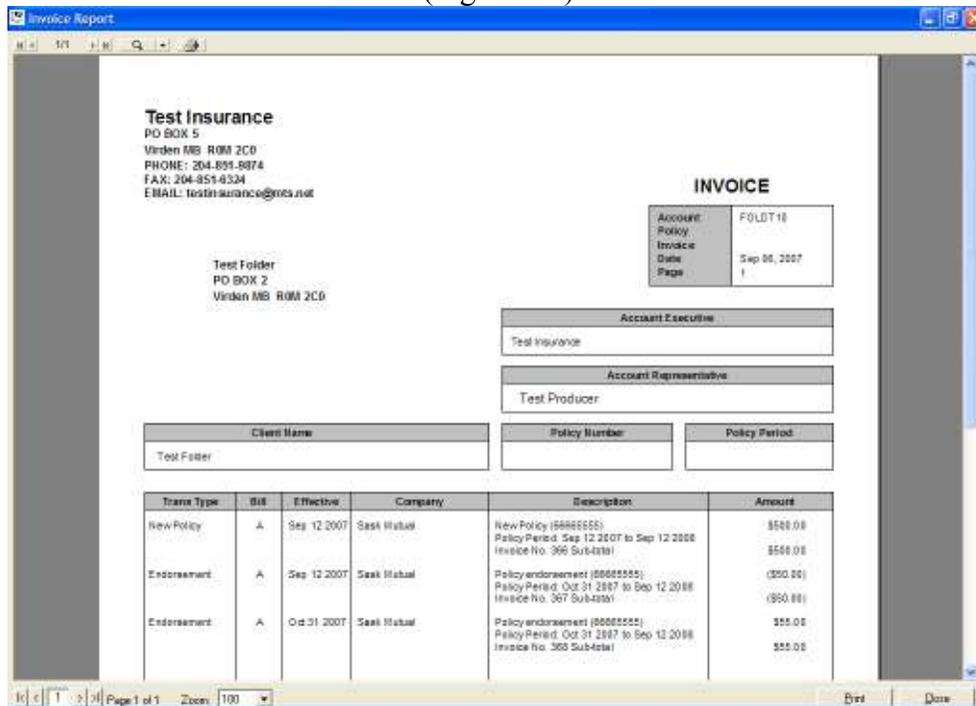
9.   Forced Abeyance for requests upon pushing print of change memo:

Available only with the new Activities setting. To have this enabled please contact support for details

When the user prints the Change Memo on the Endorsement Request they will now be presented with a forced Abeyance. This is to ensure that no abeyance is missed on any requesting document. This feature is very valuable for manual request documents done in TBW.

Office management has the ability to set the number of days past the system date to apply to these Abeyances. This setting is not a requirement and will use the System Date when not present. If the office administrator would like to set this feature please contact support for more information.

10.   Change Memo tabs – Company Memo and Client Memo:

Users will notice two new tabs on the bottom of an endorsement request document, 'Company Memo' and 'Client Memo'. Both work the same as the old Change Memo tab, the only difference is Company Memo will be address to the Company (Figure 10.1) and Client Memo will be addressed to the Client (Figure 10.2).

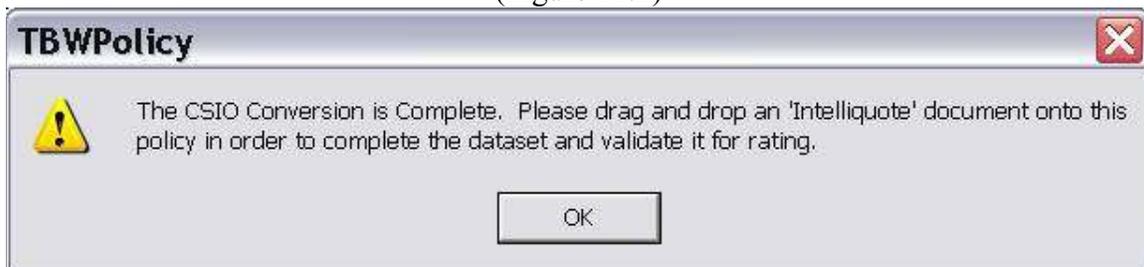(Figure 10.1 –Company Memo)

(Figure 10.2 – Client Memo)
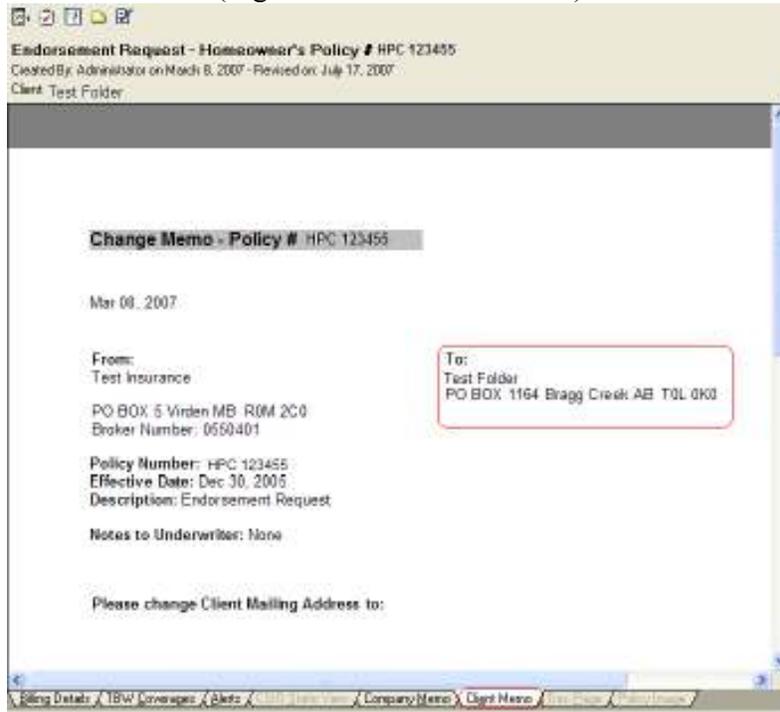
11.   **Habitational CSIO Conversion**:

With this new feature, users will now have a convert wheel on the toolbar shown under csio static view (Figure 11.1). When this icon is selected the system will map what data it can from the CSIO static view to TBW Coverages. The following message will display letting the user know that the conversion was successful (Figure 11.2). The recommended workflow is to drag and drop an Intelliquote onto the policy after the convert wheel has been selected to complete the validation and add missing data. The user can do the same in the TBW Coverages view by selecting the add/edit option on the policy (Figure 11.3).

(Figure 11.1)

(Figure 11.2)

(Figure 11.3)

12. Csio Automatic Auto Convert:

When a CSIO Auto policy is checked out of the filing cabinet onto the desktop, TBW will automatically convert it to TBW and rate the document in Intelliquote. The conversion rates the TBW/Intelliquote document and compares the total premium to the CSIO premium. It allows for a $4 variance between the two total premiums for rounding. If the premiums are out by more than this amount, the billing details screen will indicate in red with a message indicating as such (Figure 12.1).

(Figure 12.1 - Red Message- CSIO does not match TBW)

If the totals are within the $4 tolerance, the billing details will show in green with the appropriate message. (Figure 12.2)

(Figure 12.2 – Green Message – within $4 tolerance or complete match)

Conversion Alerts

Conversion Alerts are generated in order to point the user in the direction of a discrepancy in the conversion or an assumption that has been made in order to rate correctly. The goal here is that for any policy that does not rate successfully after conversion, there would be a conversion alert indicating why the discrepancy exists and allow the user to correct. (Figure 12.3)

(Figure 12.3)

If a conversion alert is present and the policy rates successfully, the conversion alert will be indicated as follows. The conversion alert will remain with the policy for future ref, even though the user has corrected the problem in the TBW dataset. (Figure 12.4)

(Figure 12.3)

13. Compare CSIO Static View to TBW Coverages:

With the following new feature, users now have the option of comparing a CSIO Static view to TBW Coverages.

If a policy has both CSIO Static View and TBW Coverages, when the compare button is clicked the user will have a new choice for either CSIO Static View or TBW Coverages depending on what view they are currently in (Figure 13.1 & 13.2).

(Figure 13.1 – TBW Coverages compare to CSIO Static View)

(Figure 13.2 Compare of TBW Coverages to CSIO Static View)
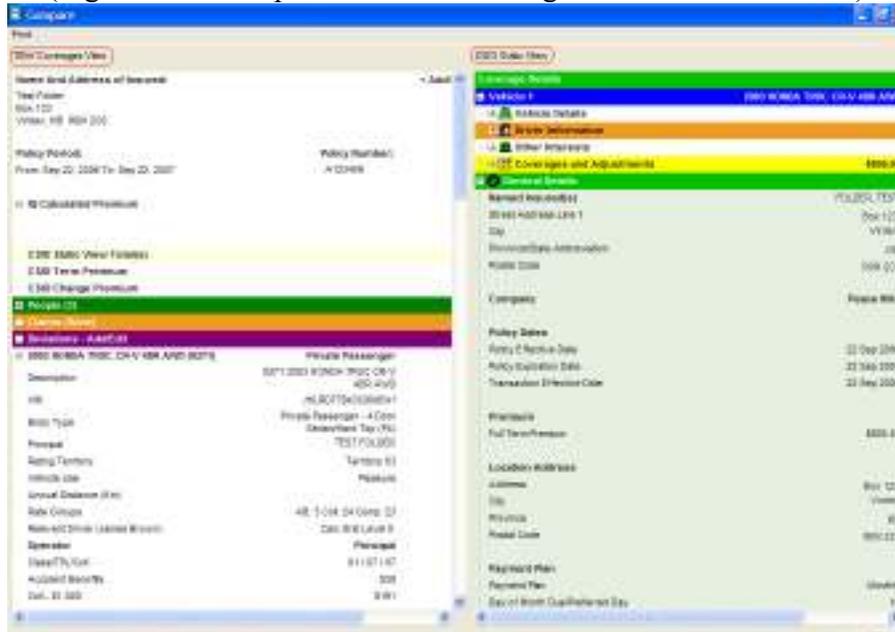
14.   IBizAutomaticProcessing

I-biz Automatic Processing is now available to all users. This function will be required to be set up on the download machine.

To enable this function, go to tools – ibiz tools – settings – set processing schedule (Figure14.1)

(Figure 14.1)
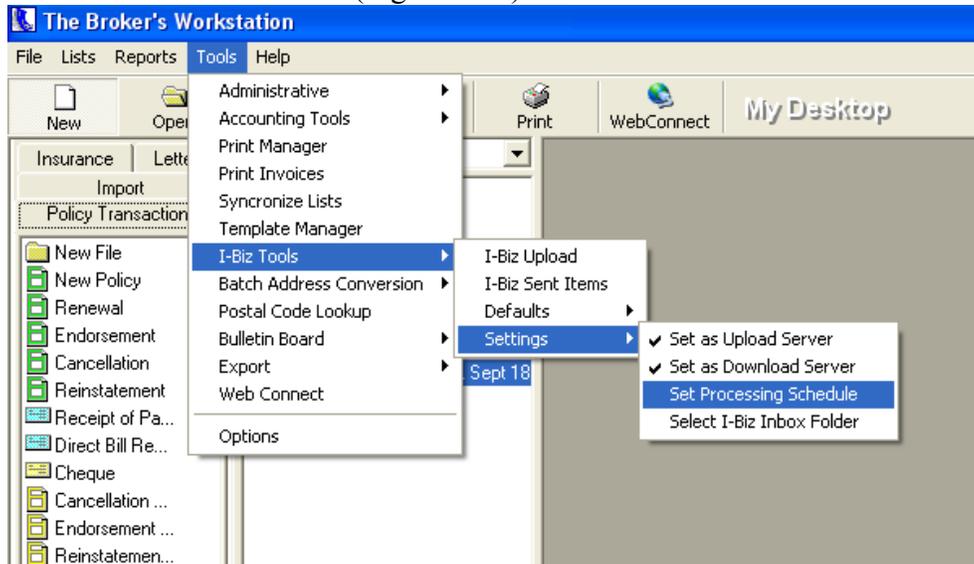
The following screen will pop up that the user must select at least 5 days and at least one of the scheduling options (Figure 14.2)

(Figure 14.2)

TBW needs to be running in order for the automatic Ibiz process to begin as scheduled.

A timer message box will pop up giving the user the chance to postpone the processing if desired at that time. If no one is at that machine the message box will disappear after 10 seconds and processing will begin (Figure 14.3)

(Figure 14.3)
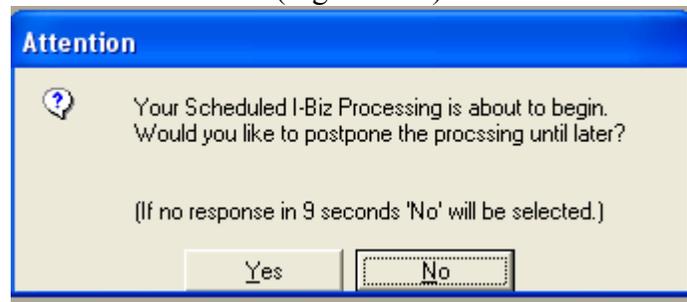
Mail will be downloaded and the normal I-Biz processing screen will load. If there are items to process that are 85% or greater, they will process automatically. When all items are processed the form will close and a printout summary will be sent straight to the printer (even if the user has Print Preview enabled). If there are no items to process the form simply closes and nothing is sent to the printer

If TBW is busy (ie there are any forms loaded, reports running etc) the processing will not be able to start. If any errors occur during processing the processing will be interrupted until a user can clear the message box. TBW will attempt to check every 30 seconds to see if it's time to run I-Biz.

15. Deviations Add/Edit

This new feature adds a Deviations line under persons/claims on TBW coverages view to access deviations. (Figure 15.1)

(Figure 15.1)

16. New Image Handling:

TBW's current system of dragging and dropping images (jpg, bmp, pdf, etc) onto a policy transaction or application does not allow a user to easily find an image.   The document list view only lists a number under the attachments column. There is no indication what the images are. In the case below the user attached 4 images to the new business application and those images have "Pulled Forward" to each subsequent policy transaction. (Figure 16.1)

(Figure 16.1)

The concept of images as "Attachments" has been removed and they are now treated as regular documents.

Images and pdfs that are dropped on to applications or policy transactions (either from outside of TBW or via the "Import" tab) will now appear in the document list as regular documents. The attachments column has been removed. (Figure 16.2)

(Figure 16.2)

There are now two ways to view an attached image.
- Same as before. Check out the parent document and access all of it's images via the "Images" tab OR
- Check out and view each image individually and independent of the parent.

Pulling Forward.

TBW will no longer pull forward images from the previous documents. The concept of pulling forward images was implemented to help a user find a particular image. This is no longer necessary. The pull forward button has been removed. (Figure 16.3)

(Figure 16.3)

Moving Images.

It is now possible to move an image from one document to another within the same client folder.
- Check out the image you want to move
- Check out the document (policy transaction or application) you want to move the image to (Parent)
- Drag the image on to the new parent.
When you open the folder you will see the image now appears as a child of the new parent.

17.   Global Defaults:

Global Defaults are used to set endorsement/extension defaults globally or locally on Intelliquote. To turn this feature on go to the Tools Menu, Options, and under the General Tab the user will see Defaults (Figure 17.1). In here the user can choose the Global or Local setting. Global defaults will set the same endorsement/extension defaults on all users' workstations in the office. Local defaults will set the endorsement/extension defaults locally to this user's machine. To control who has access to this setting the Administrator can set this up in User Rights for each user.

(Figure 17.1)
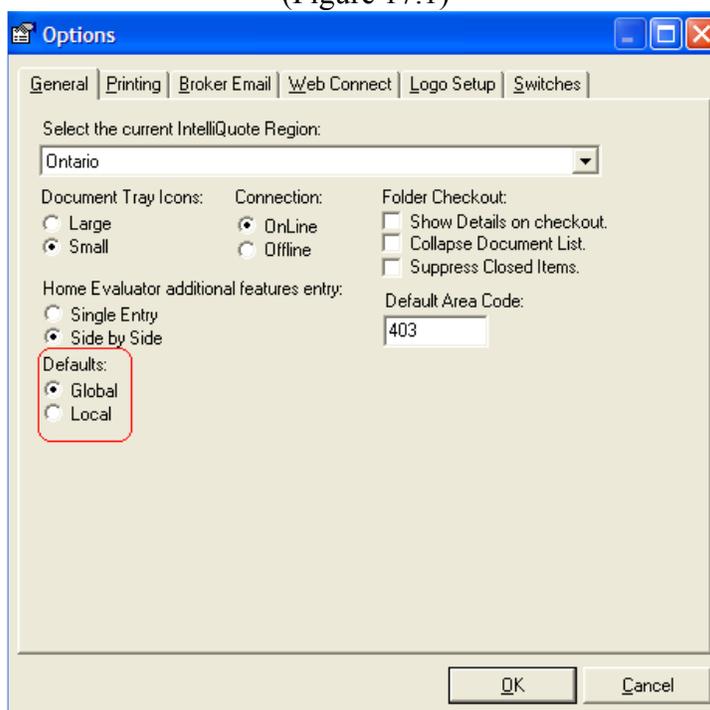
To set the endorsement/extension defaults on the intelliquote, the user needs to open a new intelliquote, enter all information required, and then on the endorsement/extension screen the user can select all appropriate items and hit the set defaults button. This will bring up a window asking the user if the following defaults are correct, and the user has the option of saying yes or no. Once yes is selected, finish the document and the next intelliquote created for that same policy type will have those default endorsements selected.

18.   Comparison Report:

Comparison report is used to compare Company values in a given range. Ex: When client is deciding/ investigating on there options for amount of coverage, broker can show them how the different coverage amounts would affect each company's premium.
Instead of doing a full IQ for 80,000 and then changing the value to 90,000 and recalculate to have a look, broker can use the comparison tab to have the screen show the client how each increment would affect premium. This feature is only available on Habitational Intelliquote's. Users will find a new tab on the bottom of there Habitational Intelliquote's called Comparison Report. When selected the following Comparison Details screen will be presented (Figure 18.1).

(Figure 18.1)

User has the choice of filling in what Start Value, End Value and Increment Value they would like to compare with there contracted companies. Once selected then user will be presented with the comparison report but first they will be prompt with a question asking if they would like to Export Comparison Report to CSV (excel sheet). User has choice of yes or no at this time. If no is selected then user can continue looking over the comparison report. If yes is selected, a save to file window will open and the user has choice of saving the exported comparison to there hard drive.

Example of the finished Comparison Report is shown in (Figure 18.2)

(Figure 18.2)

Comparison
Calculation Date: 08/14/2007

Coverage	AXA	Aviva	Dominion	Economical	Federation	ICPEI
$40,000	217	555	405	381	583	0
$50,000	217	555	405	381	583	0
$60,000	217	555	433	381	583	0
$70,000	246	555	452	381	583	0
$80,000	275	555	398	410	634	323
$90,000	305	583	427	437	668	343
$100,000	335	609	459	454	689	361
$110,000	365	636	502	479	712	382
$120,000	394	668	556	503	732	406
$130,000	424	703	602	526	773	433
$140,000	456	742	638	549	813	461
$150,000	487	782	675	573	856	490

	AXA	Aviva	Dominion	Economical	Federation	ICPEI
Type of Coverage	Standard	Basic Broad	Broad	Bronze	Standard	Comp.
Deductible	$500	$500	$500	$500	$500	$500
Location Factor	Territory A	Protected H1	Territory 1	Territory A	Table 1E	Territory 1
Liability	$1,000,000	$1,000,000	$1,000,000	$1,000,000	$1,000,000	$1,000,000
Year Built	1995					
Number of Claims	0					
Eldest Person	37					
Number of Mortgagees	0					
Security System	None					
Primary Heating System	Furnace - Central / N. Gas					

Coverage Report / Summary Report(s) / Alerts \ Comparison Report /

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.