



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.

Table of Contents

1. [Webconnect ICPEI](#)
2. [MSB Express Webconnect](#)
3. [Western Assurance Webconnect](#)
4. [New SGI Webconnect](#)
5. [Receipt Print & Post](#)
6. [Automatic Post of Journal Entry after Print](#)
7. [Custom Ledger Card Columns](#)
8. [Multiple Transactions on Single Invoice](#)
9. [Forced Abeyance after Print on Endorsement Request](#)
10. [New Change Memo tabs](#)
11. [Habitational CSIO Conversion](#)
12. [CSIO Automatic Auto conversion](#)
13. [Compare CSIO Static to TBW Coverages](#)
14. [Automatic IBIZ Processing](#)
15. [Deviations Add/Edit on TBW Coverages](#)
16. [New Image Handling](#)
17. [Global Defaults](#)
18. [Comparison report on Intelliquote](#)

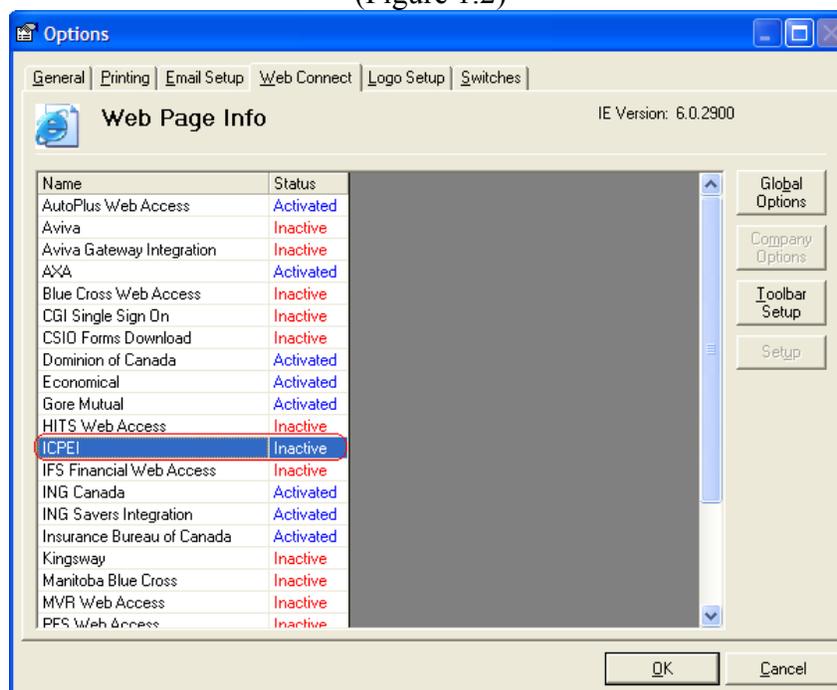
1. Webconnect ICPEI :

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)

WebConnect - Dominion of Canada	<input type="checkbox"/>					
WebConnect - Economical	<input type="checkbox"/>					
WebConnect - Gore Mutual	<input type="checkbox"/>					
WebConnect - HITS	<input checked="" type="checkbox"/>					
WebConnect - ICPEI	<input checked="" type="checkbox"/>					
WebConnect - IFS	<input checked="" type="checkbox"/>					
WebConnect - ING Canada	<input type="checkbox"/>					

(Figure 1.2)



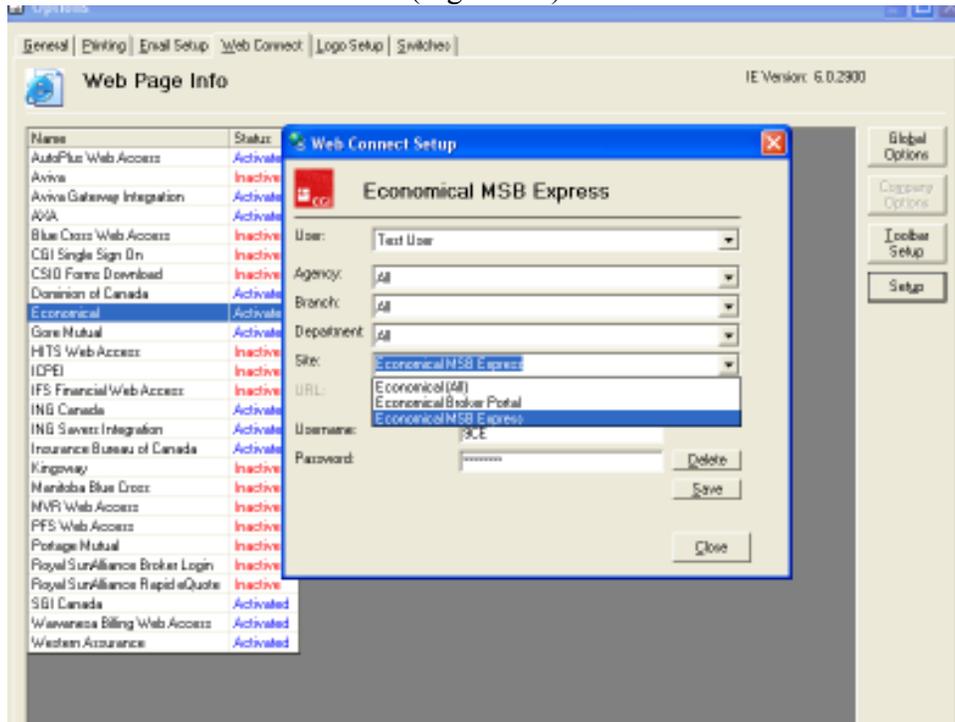
2. MSB Express Webconnect (Only Economical Brokers) :

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)

WebConnect - Blue Cross	<input checked="" type="checkbox"/>					
WebConnect - CGI (Single Sign On)	<input checked="" type="checkbox"/>					
WebConnect - CSIO	<input checked="" type="checkbox"/>					
WebConnect - Dominion of Canada	<input checked="" type="checkbox"/>					
WebConnect - Economical	<input checked="" type="checkbox"/>					
WebConnect - Gore Mutual	<input checked="" type="checkbox"/>					
WebConnect - HITS	<input checked="" type="checkbox"/>					

(Figure 2.2)



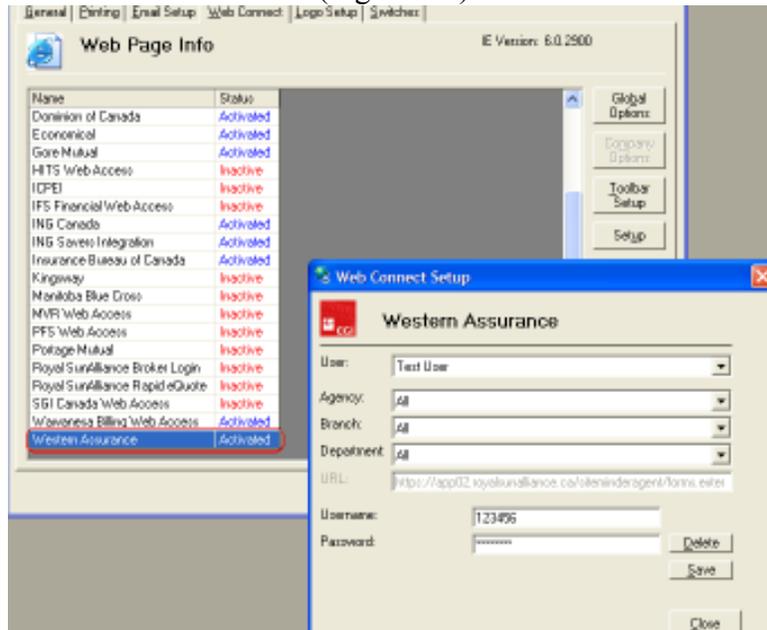
3. Webconnect – Western Assurance:

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)

WebConnect - Manitoba Blue Cross	<input checked="" type="checkbox"/>					
WebConnect - Portage Mutual	<input checked="" type="checkbox"/>					
WebConnect - Premium Financial	<input checked="" type="checkbox"/>					
WebConnect - RSA	<input checked="" type="checkbox"/>					
WebConnect - Rapid eQuote	<input checked="" type="checkbox"/>					
WebConnect - SGI	<input checked="" type="checkbox"/>					
WebConnect - Setup Admin	<input checked="" type="checkbox"/>					
WebConnect - Toolbar Setup	<input checked="" type="checkbox"/>					
WebConnect - Wawanesa Billing	<input checked="" type="checkbox"/>					
WebConnect - Western Assurance	<input checked="" type="checkbox"/>					

(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)

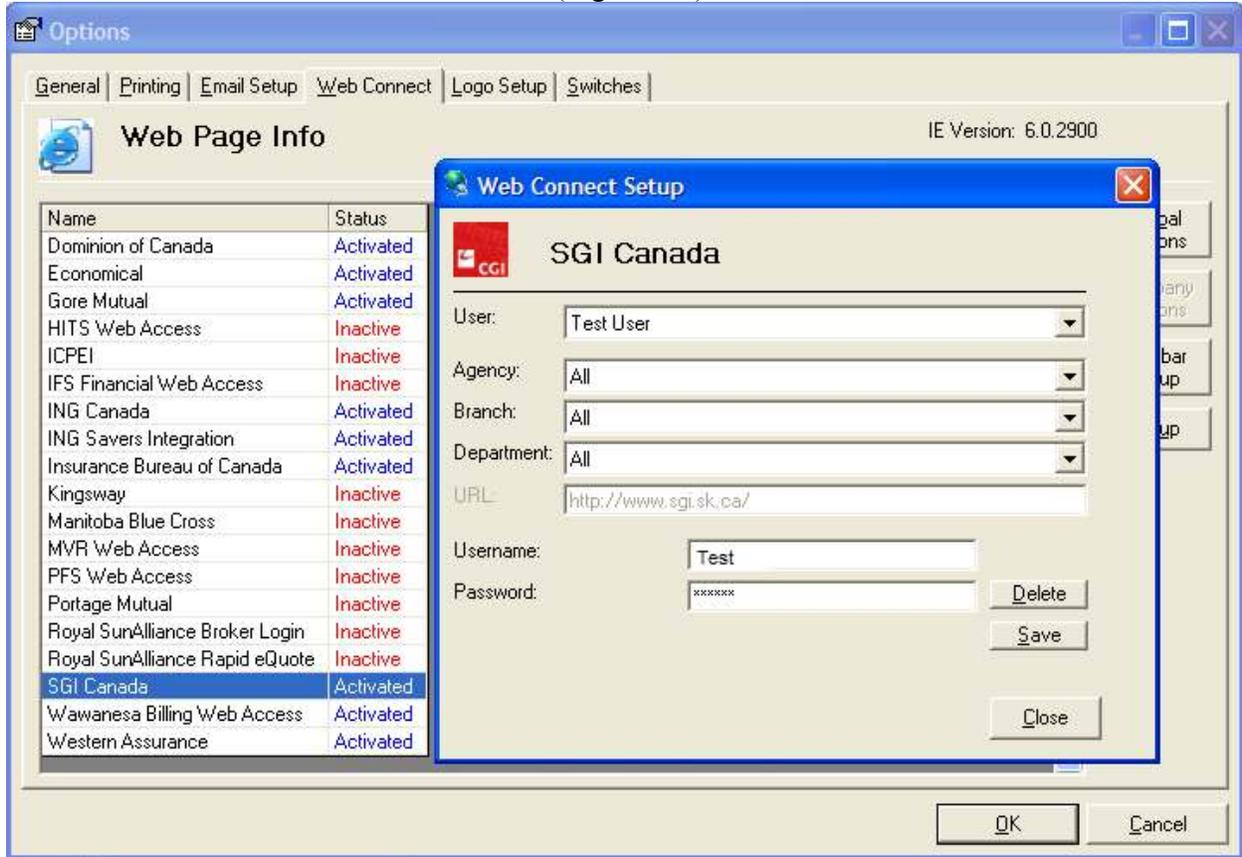
(Figure 4.1)



(Figure 4.2)

WebConnect - Rapid eQuote	<input checked="" type="checkbox"/>					
WebConnect - SGI Canada	<input checked="" type="checkbox"/>					
WebConnect - Setup Admin	<input checked="" type="checkbox"/>					
WebConnect - Toolbar Setup	<input checked="" type="checkbox"/>					
WebConnect - Wawanesa Billing	<input checked="" type="checkbox"/>					
WebConnect - Western Assurance	<input checked="" type="checkbox"/>					

(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 and 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)

The screenshot shows a software window titled "Enter Payment". Inside, there is a "Receipt of Payment" form with the following fields: "Date" (03/08/2007), "Bank Account" (00101 Operating Bank), "Memo" (test payment), "Amount" (500), and "Abeyance" (unchecked). To the right of the form are buttons for "OK", "Close", and "Print & Post" (which is highlighted with a red box). Below the form is an "Allocations" table with columns: Policy, Type, Reference, Company, Bill, Desc, EffDate, ExpDate, Prem/Amn, Balance, and Amount.

Policy	Type	Reference	Company	Bill	Desc	EffDate	ExpDate	Prem/Amn	Balance	Amount
654620										
	New Policy	342	Allianz	Agency B	New Policy	06/05/2007	06/05/2008	500.00	500.00	
654985										
	New Policy	343	Gore Mutual	Agency B	New Policy	06/05/2007	06/05/2008	741.00	741.00	
	PMT	43			test payment	03/08/2007		(500.00)	(500.00)	
	PMT	45			test payment	03/08/2007		(150.00)	(150.00)	
	PMT	47			test	03/08/2007		(134.00)	(134.00)	
	PMT	48			tesdt	03/08/2007		(231.00)	(231.00)	

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)

The screenshot shows a software window titled "Journal Entry". It has an "Accounting Date" field (03/08/2007) and a "Description" field (test Journal Entry). Below is a table with columns: Account, SubAccount, Description, Debit, and Credit.

Account	SubAccount	Description	Debit	Credit
001011011		test Journal Entry	200.00	
001501011		test Journal Entry		200.00

Buttons for "OK", "Cancel", and "Print" (highlighted with a red box) are on the right. At the bottom, there are "New...", "Modify...", and "Delete" buttons, and a "Transaction Balance" field showing \$0.00.

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)

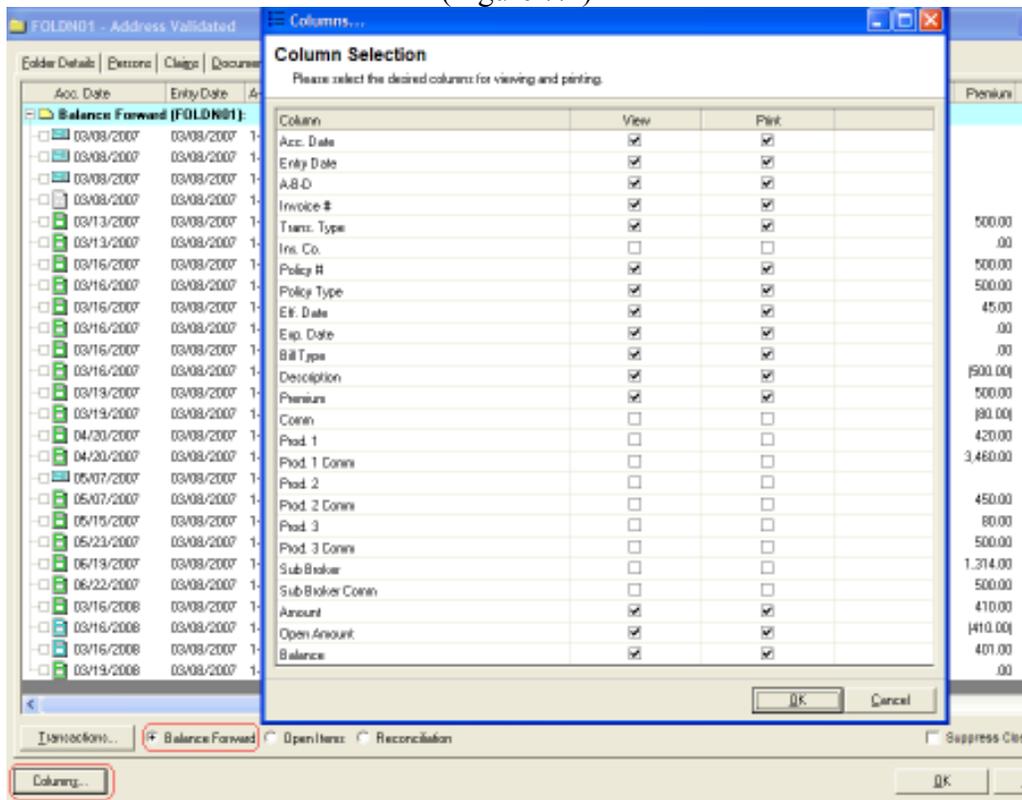
[Back to Contents](#)

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:

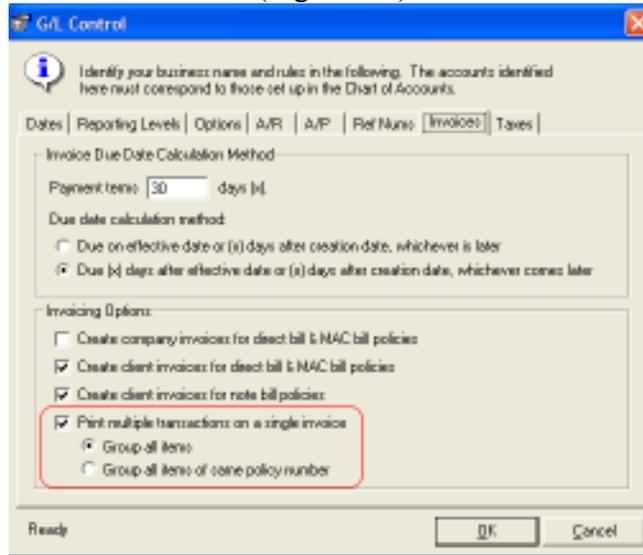
a) Enabling and Configuring

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)

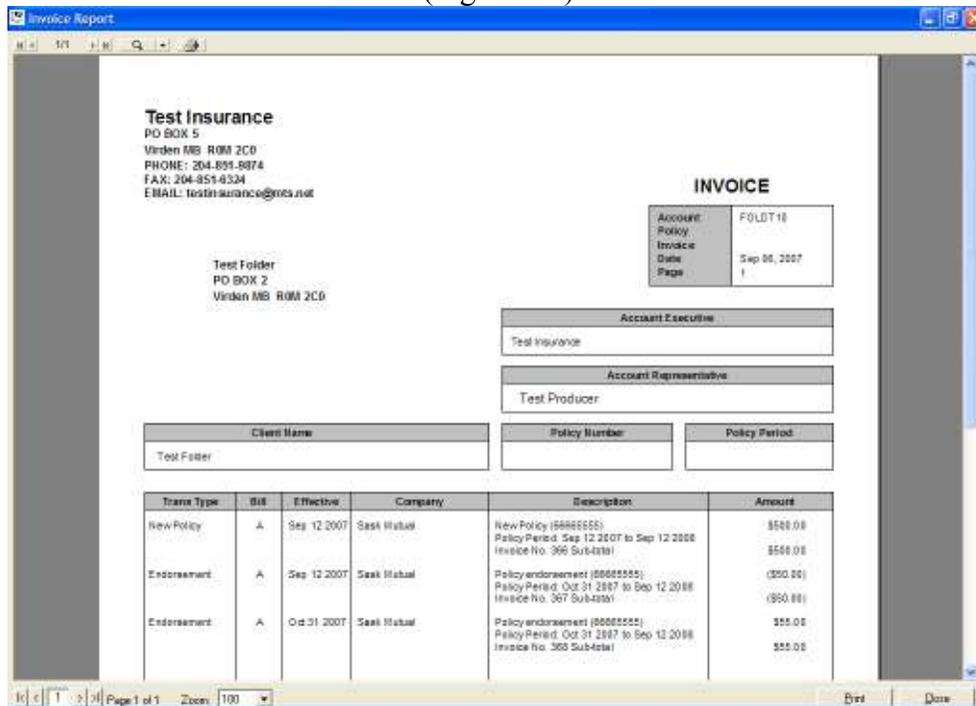


b) Printing Invoices

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)

Endorsement Request – Homeowner's Policy # HPC 123455
Created By: Administrator on March 8, 2007 - Revised on: July 17, 2007
Client: Test Folder

Change Memo - Policy # HPC 123455

Mar 08, 2007

From:
Test Insurance
PO BOX 5 Virden MB R0M 2C0
Broker Number: 0550401

To:
Wawanesa
708 11 Ave SW SUITE 600
Calgary AB T2R 0E4

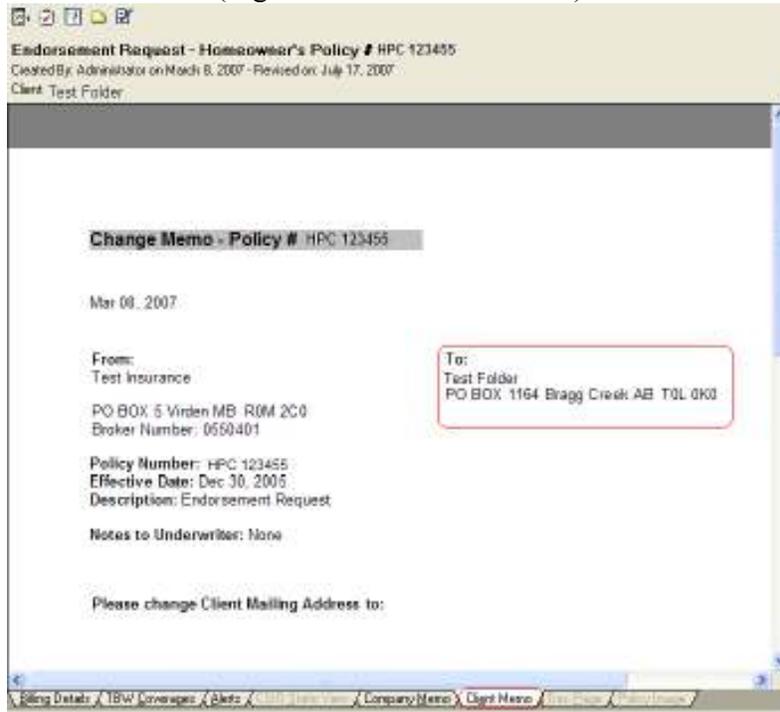
RE:
Test Folder
PO BOX 1164 Bragg Creek AB T0L 0K0

Policy Number: HPC 123455
Effective Date: Dec 30, 2005
Description: Endorsement Request

Notes to Underwriter: None

Billing Details | TBW Coverage | Alerts | Company Memo | Client Memo

(Figure 10.2 – Client Memo)



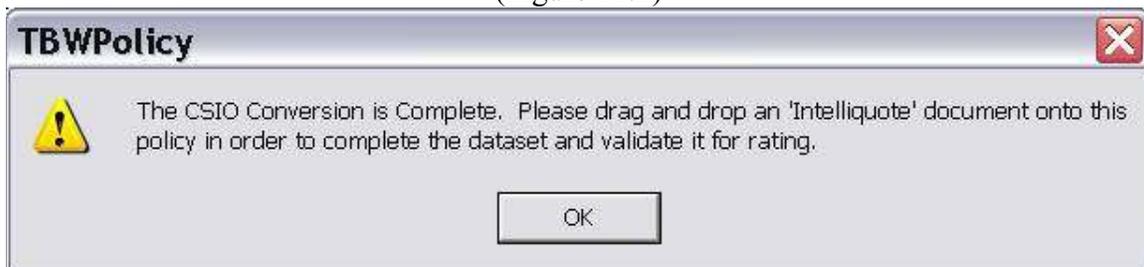
11. Habitational CSIO Conversion:

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)

Coverage Details		
Discounts		
- Renewal Discount		(5%)
- New Home Discount		(1%)
- Personal Insurance Dis.		(10%)
Surcharges		
- Age Surcharge		25%
OTHER PROPERTY		
	Coverage	Premium
ENDORSEMENT S/EXTENSIONS		
Credit Card Fraud:	\$5,000	
Fire Fighting Coverage:		\$24
Guaranteed Replacement Cost:		
Sewer Backup:		
Mass Evacuation:		
Single Limit Endorsement:	\$140,000	
Csio Term Premium		\$571.00
TOTAL PREMIUM		\$387
		\$387

< Add/Edit... >

Billing Details / TBW Coverages / Alerts / CSIO Static View / Company Memo / Client Memo / Dec Page / Policy Image

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)

Billing Details		
Name And Address of Insured:		
Test Folder PO BOX 253 Komoka ON N0L 1R0		
Type of Transaction:	Endorsement	
Type of Policy:	Auto Policy	
Description:	CSIO - Initial Load	
Policy Number:	123456	
Agency:	Test Agency	
Branch:	Main Branch	
Department:	Main Department	
Insurance Company:	Gore Mutual Insurance Company	
Effective Date:	February 01, 2006	
Expiry Date:	February 01, 2007	
Billing Type:	Direct Bill	
Transacted:	False	
Transaction Status:	N/A	
Change Premium:	\$0.00	CSIO Change Premium: (\$302.00)
Term Premium:	\$0.00	CSIO Term Premium: \$0.00
Annual Premium:	\$0.00	IQ Deviated Premium: \$866.00
Policy Commission:	\$0.00	!!!! Please check Alerts, TBW Coverages and CSIO Static View for Premium Difference !!!!
Policy Commission %:	0%	
Sales Taxes:		
Producers:		
Producer/CSR 1:	Test Producer	

Billing Details / TBW Coverages / Alerts / CSIO Static View / Company Memo / Client Memo / Dec Page / Policy Image

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)

Billing Details									
Name And Address of Insured:									
Test Folder 1325 Aldersbrook Rd London OH 46033									
Type of Transaction:	Endorsement								
Type of Policy:	Auto Policy								
Description:	CSIO - Initial Load								
Policy Number:	1234567								
Agency:	Test Agency								
Branch:	Main Branch								
Department:	Main Department								
Insurance Company:	Economical Mutual								
Effective Date:	February 25, 2007								
Expiry Date:	February 25, 2008								
Billing Type:	MAC Bill								
Transacted:	False								
Transaction Status:	N/A								
Change Premium:	\$0.00								
Term Premium:	\$3,029.00								
Annual Premium:	\$3,029.00								
Policy Commission:	\$0.00								
Policy Commission %:	0%								
Sales Taxes:									
Producers:									
<table border="1"> <tr> <td>CSIO Change Premium:</td> <td>\$0.00</td> </tr> <tr> <td>CSIO Term Premium:</td> <td>\$3,029.00</td> </tr> <tr> <td>IQ Deviated Premium:</td> <td>\$3,029.00</td> </tr> <tr> <td colspan="2">CSIO Automatic Conversion is complete. Please review CSIO coverages and TBW Coverages to confirm accuracy.</td> </tr> </table>		CSIO Change Premium:	\$0.00	CSIO Term Premium:	\$3,029.00	IQ Deviated Premium:	\$3,029.00	CSIO Automatic Conversion is complete. Please review CSIO coverages and TBW Coverages to confirm accuracy.	
CSIO Change Premium:	\$0.00								
CSIO Term Premium:	\$3,029.00								
IQ Deviated Premium:	\$3,029.00								
CSIO Automatic Conversion is complete. Please review CSIO coverages and TBW Coverages to confirm accuracy.									
Billing Details / TBW Coverages / Alerts / CSIO Static View / Company Memo / Client Memo / Data Page / Policy Image									

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)

Client: Test Folder	
Company	Message
 The Guarantee	A Renewal Discount of 5% has been applied to this policy with an Original Inception Date of 18 Feb 2007. In order for IQ to rate this policy correctly, the Original Policy Inception Date has to be a minimum of 18 Apr 2004. This has been changed for you.
	The 'Driver Record Override' is selected. Underwriting rules and guidelines used to determine the Driver Record are therefore bypassed. Please ensure this Override is intended.
	The 'Driver Class Override' is selected. Underwriting rules and guidelines used to determine the Driver Class are therefore bypassed. Please ensure this Override is intended.
	The 'Rate Group Override' is selected. Please ensure this Override is intended.

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)

Billing Details

Name And Address of Insured:
Test Folder
Box 123
Virdeu, MB R0M 2C0

Type of Transaction: Renewal
Type of Policy: Auto Policy
Description: CSIO - Renewal
Policy Number: WA123456
Agency: Test Agency
Branch: Main Branch
Department: Main Department
Insurance Company: Guarantee of North America
Effective Date: April 16, 2007
Expiry Date: April 16, 2008
Billing Type: MAC Bill
Transacted: False
Transaction Status: N/A

Premium: \$1,489.00
Term Premium: \$1,489.00
Annual Premium: \$1,489.00
Policy Commission: \$186.13
Policy Commission %: 12.50%

Sales Taxes:

Producers:
Producer/CSR 1: Test Producer
Producer 1 Comm: \$0.00
Producer 1 Comm %: 0%
Producer/CSR 2: None
Producer 2 Comm: \$0.00
Producer 2 Comm %: 0%

CSIO Change Premium: \$1,489.00
CSIO Term Premium: \$1,489.00
IQ Calculated Premium: \$1,487.00
CSIO Automatic Conversion is complete. Please review CSIO coverages and TBW Coverages to
!!!! Please Review Conversion Alerts !!!!

Billing Details / TBW Coverages / Alerts / CSIO Static View / Change Name / User Page / Policy Invoice

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)

Renewal - Auto Policy Policy # A69234
Created By: CSIO on August 2, 2006 - Revised on: May 30, 2007
Client ID: TESTFH1 - Test Folder

Name And Address of Insured: < AddEdit... >
Test Folder
Box 123
Virdeu, MB R0M 2C0

Policy Period: From: Sep 22, 2006 To: Sep 22, 2007
Policy Number: A69234

Please select a Document

Please select a document to compare...

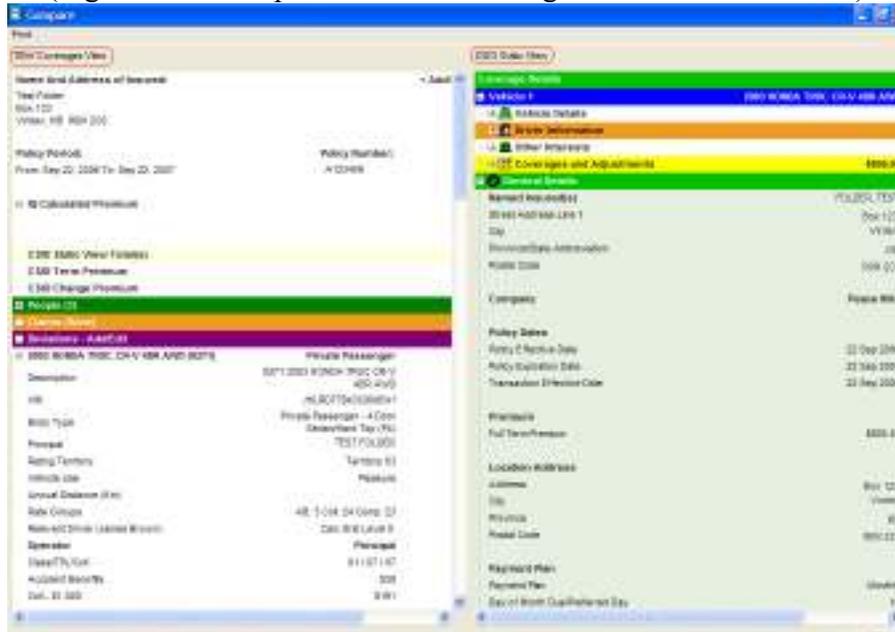
Name	Date Created	Created By	Eff Date	Exp Date
<input type="checkbox"/> Patent Document				
<input type="checkbox"/> Original EDI Document				
<input checked="" type="checkbox"/> CSIO Static View				
<input type="checkbox"/> Auto Policy New Policy	Jun 04, 2003	System	Sep 22, 2002	Sep 22, 2003
<input type="checkbox"/> CSIO - Endorsement	Jun 04, 2003	CSIO	Sep 22, 2002	Sep 22, 2003
<input type="checkbox"/> CSIO - Renewal	Aug 07, 2003	CSIO	Sep 22, 2003	Sep 22, 2004
<input type="checkbox"/> CSIO - Endorsement	Aug 13, 2003	CSIO	Sep 22, 2002	Sep 22, 2003
<input type="checkbox"/> Endorsement CSIO - Relieve	Aug 13, 2003	CSIO	Sep 22, 2003	Sep 22, 2004
<input type="checkbox"/> Endorsement CSIO - Relieve	Aug 14, 2003	CSIO	Sep 22, 2003	Sep 22, 2004
<input type="checkbox"/> CSIO - Cancellation	Jan 02, 2004	CSIO	Sep 22, 2003	Sep 22, 2004

Summary Info. All Data

OK Cancel

Billing Details / TBW Coverages / Alerts / CSIO Static View / Change Name / User Page / Policy Invoice

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

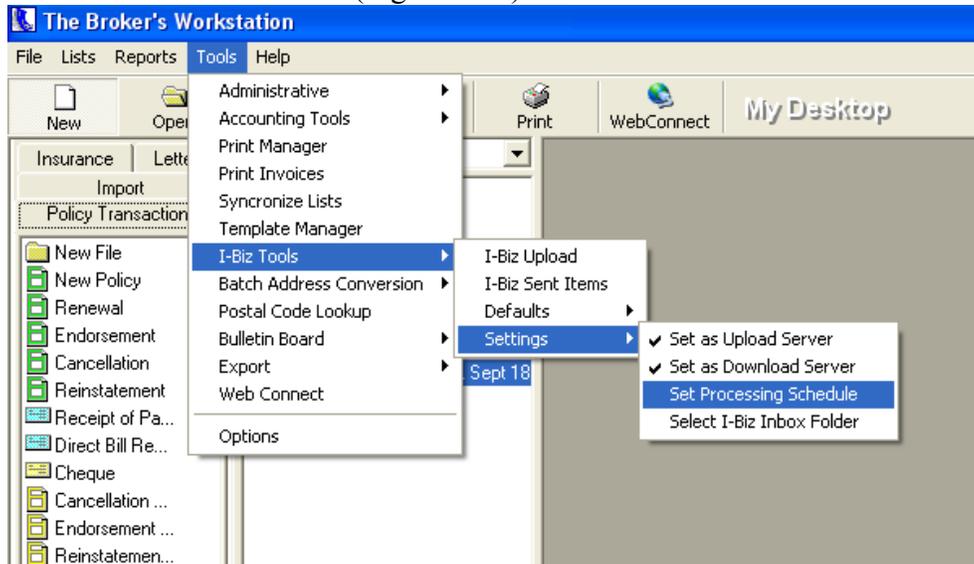


14. IBizAutomaticProcessing

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)

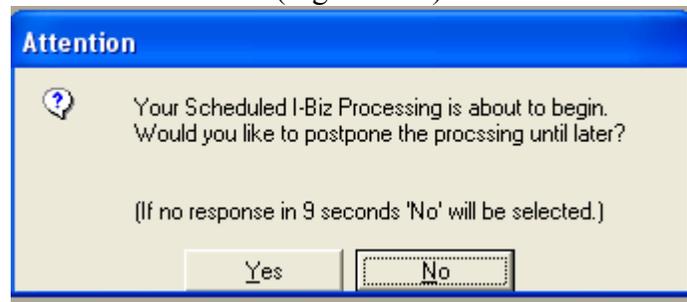
(Figure 14.2)



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)

Client: Test ON Folder
Name And Address of Insured: TEST ON FOLDER, 10 BONAVENTURE Dr, London ON N5V 4B5
Policy Period: From: May 18, 2007 To: May 18, 2008
TOTAL PREMIUM: \$431

Premium Deviations
Please enter the Premium Deviation information for this IntelliQuote

Claims | Comparison | Summary

Comparison Report All Fields Only Deviated Fields

Coverage Item	Field Name	Calculated Value	Deviated Value	Description
Vehicles				
Private Passenger Vehicle				
2001 GRAND CARAVAN SE (2662)				
	Driver Class	1		
	Driver Record (Third Party Liability)	1		
	Driver Record (Collision)	1		
	Rate Group (Accident Benefits)	3		
	Rate Group (Collision)	19		
	Rate Group (Comprehensive)	18		
	Deductible (Direct Compensation)	\$300		
	Deductible (All Perils)	\$500		
	Premium (Third Party Liability Bodily Injury)	\$601	\$601	

Add/Edit... Delete OK Cancel

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)

Name	On Tree	Created	Eff Date	Exp Date	Created By	Attachments
Activity						
FCT - (home)	No	Sep 27, 2006			Leah	0
IntelliQuote - (home)	No	Sep 27, 2006			Leah	0
Application - (home)	No	Sep 28, 2006			Leah	4
Home Policy IHPC	No	Sep 30, 2006	Sep 29, 2006	Sep 29, 2007	WawanesaEDI	4
Endorsement Re	No	Oct 23, 2006	Sep 30, 2006	Sep 29, 2007	Leah	4
Endorsement -	No	Oct 24, 2006	Sep 30, 2006	Sep 29, 2007	WawanesaEDI	4

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)



Name	On Tree	Created	Eff Date	Exp Date	Revised	Created By
RCT - (home)	No	Sep 27, 2006			Sep 28, 2006	Leah
IntelQuote - (home)	No	Sep 27, 2006			Sep 28, 2006	Leah
Application - (home)	No	Sep 28, 2006			Sep 28, 2006	Leah
Home Policy #HPC 5477030	No	Sep 30, 2006	Sep 29, 2006	Sep 29, 2007	Oct 23, 2006	WawanesaEDI
Endorsement Request	No	Oct 23, 2006	Sep 30, 2006	Sep 29, 2007	Oct 23, 2006	Leah
Endorsement - Request	No	Oct 24, 2006	Sep 30, 2006	Sep 29, 2007	Oct 24, 2006	WawanesaEDI
Image - House	No	May 08, 2007			May 08, 2007	System
Image - House 1	No	May 08, 2007			May 08, 2007	System
Image - House	No	May 08, 2007			May 08, 2007	System
Image - House 2	No	May 08, 2007			May 08, 2007	System

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.

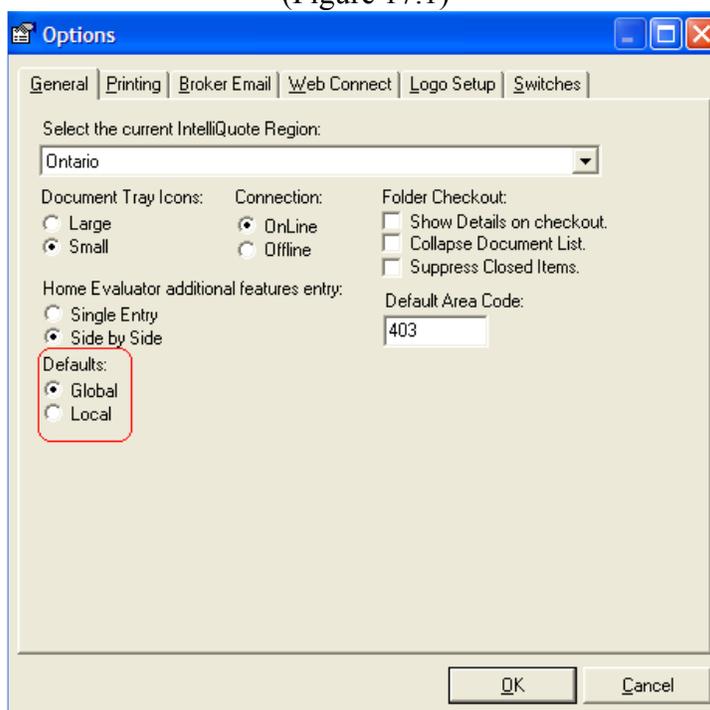
- Check out the image you want to move
- Check out the document (policy transaction or application) you want to move the image to (Parent)
- Drag the image on to the new parent.

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)

Comparison Details

Start Value: 40000

End Value: 150000

Increment Value: 10000

OK Cancel

User has the choice of filling in what Start Value, End Value and Increment Value they would like to compare with their contracted companies. Once selected then user will be presented with the comparison report but first they will be prompted 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 their hard drive.

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

(Figure 18.2)

Comparison						
Calculation Date: 08/14/2007						
	AXA	Aviva	Dominion	Economical	Federation	ICPEI
Coverage						
\$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
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					

< [Progress Bar]

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.

[Back to Contents](#)