



5 December 2008

**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 newest features to **The Broker's Workstation (TBW)**:

### ***Contents***

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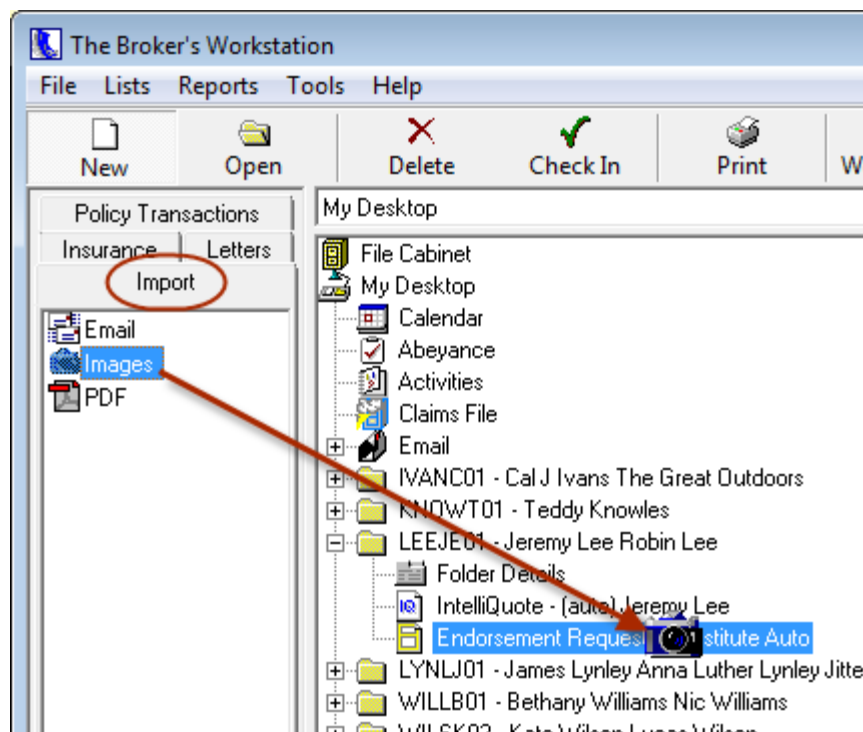
1. [Import All File Types](#) – The Import feature now enables the TBW user to import any type of document into TBW.
2. [Keyword Search Feature](#) – Use the Keyword Search option to search for a particular client folder using any part of the folder name.
3. [Expanded WebConnect Company List](#) – A number of additional Companies can now be accessed through the WebConnect feature.
4. [New Icon for Lapsed Policies](#) – In the Current Policies window, any lapsed policy will now be visually distinguishable from active policies by its unique icon.
5. [Motorcycle VIN Search](#) – When completing the IQ Coverage Item Wizard for a motorcycle, the TBW user can now search for the motorcycle's details based on the VIN.
6. [Enhanced Auto Coverage Report](#) – The enhanced Auto Coverage Report provides the TBW user with more information, as well as the ability to expand or collapse sections of the report to create a more detailed or a more compact document.
7. [Manual Rating of Mobile Homes with Aviva Elite](#) – When creating an IntelliQuote for a mobile home, the TBW user can now choose to manually rate the item with Aviva Elite.

## 1. Import All File Types

Clients have requested the ability to import a wide variety of documents into TBW to attach to client folders or other documents. In response to this request from our clients, the Import feature has been enhanced to allow the user to quickly and easily import any type of file into TBW.

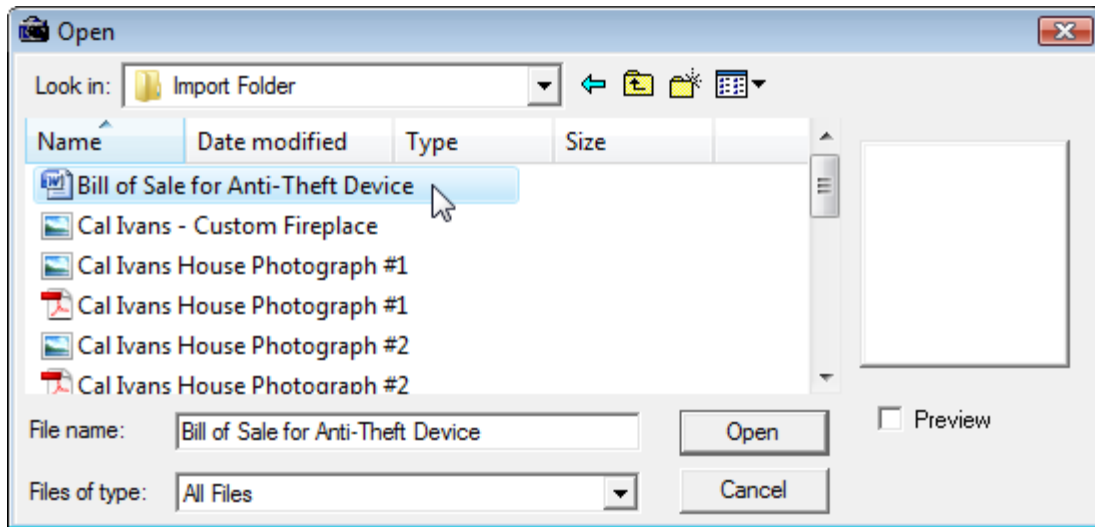
To import a file into TBW, drag and drop the **Images icon** from the **Import Tray** onto the target client folder or document in the **Desktop Tree** (see Figure 1.1).

(Figure 1.1)

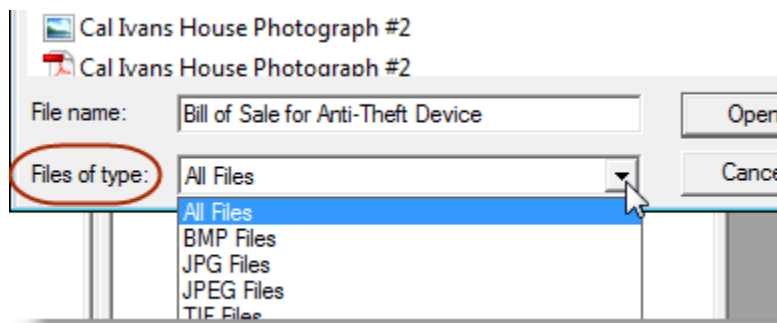


In the **Open dialogue box**, find and double click the target file (see Figure 1.2). Note that the **Files of Type** drop-down menu allows you to choose to view **All Files** or only a specific type of file (see Figure 1.3).

(Figure 1.2)

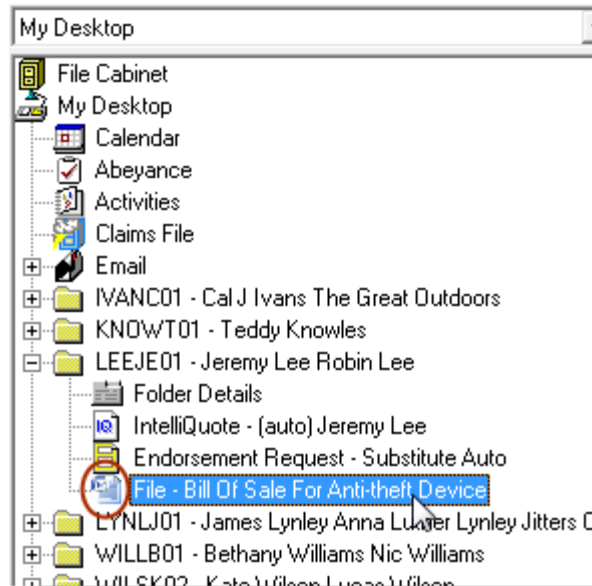


(Figure 1.3)



The imported file will appear in the Desktop Tree, labelled as a “File.” The file’s icon will clearly identify the file type (see Figure 1.4).

(Figure 1.4)



To open and view the imported document, simply double click the file in the Desktop Tree. Depending on the file type, the document will open either in the TBW Document Window or in the corresponding program window.

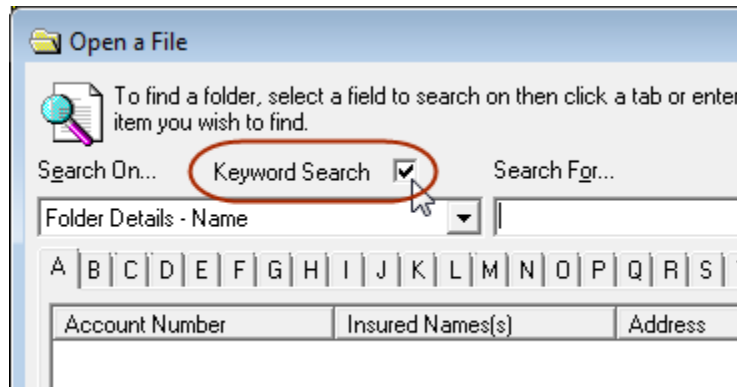
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## 2. Keyword Search Feature

TBW users have asked for the ability to search for a particular client folder using any word in the folder's name. To provide our clients with an enhanced folder-search capability, the Keyword Search feature will allow the TBW user to conduct searches with all or only a segment of any word in the folder name.

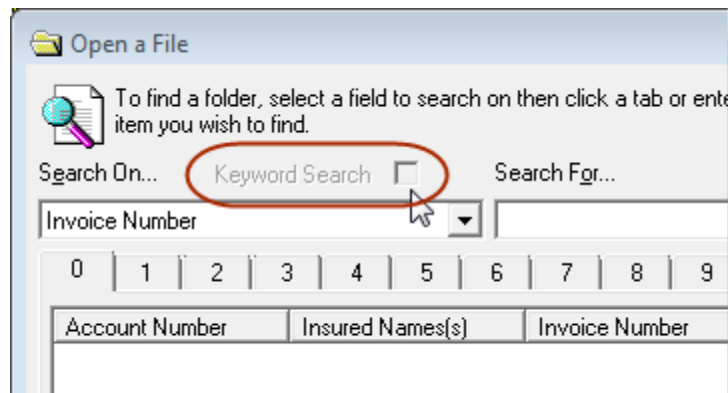
The Keyword Search option is found in the **Open a File window**. To open this window, either click the **Open** button on the TBW toolbar, or double click the **File Cabinet icon** in the Desktop Tree. The **Keyword Search checkbox** will be available only for the **Folder Details – Name** and the **Folder Details – Organization** search options in the **Search On drop-down menu** (see Figure 2.1).

(Figure 2.1)



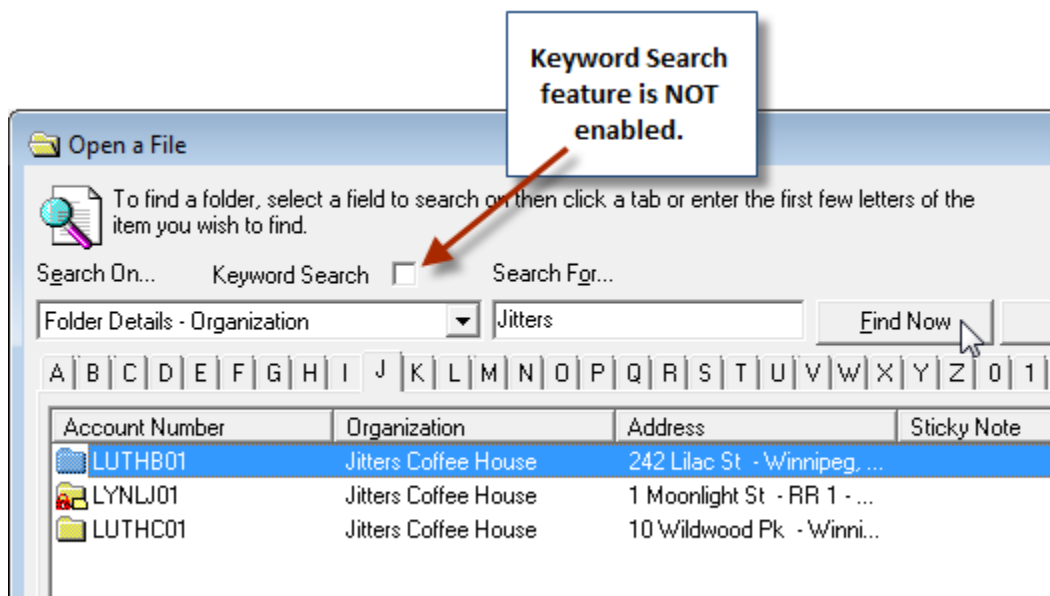
Note that the Keyword Search checkbox will be greyed out and inaccessible when any other search option is selected in the **Search On** drop-down menu (see Figure 2.2).

(Figure 2.2)



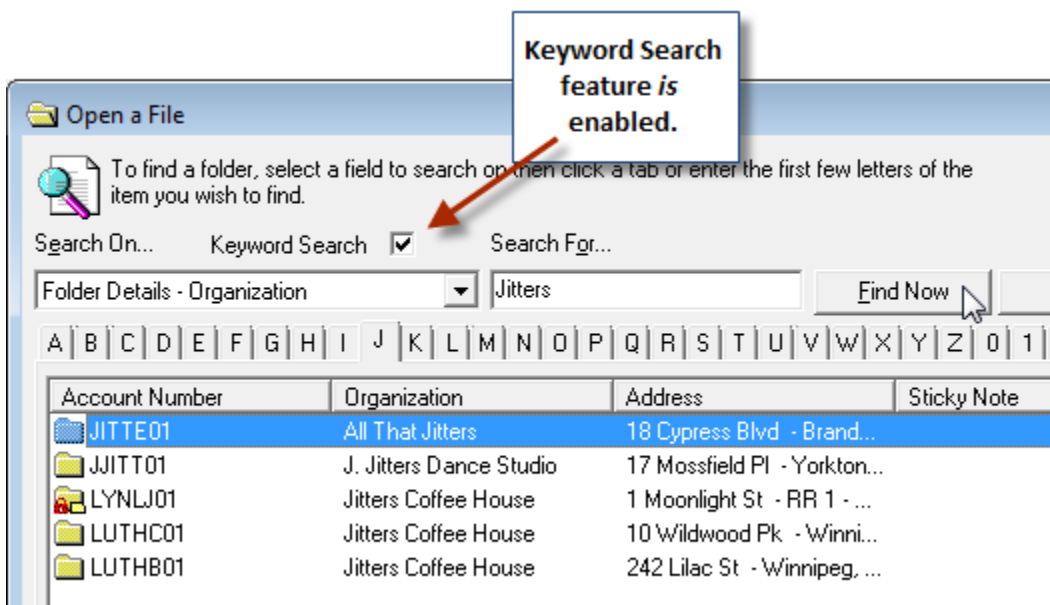
Using the Keyword Search feature will allow the user to enter any word in a folder's name to search for and find that particular folder. For example, when searching for a folder with the word "Jitters" in the folder name, a search *without* the Keyword Search feature enabled returns all folders with the word "Jitters" at the start of the name **only** (see Figure 2.3).

(Figure 2.3)



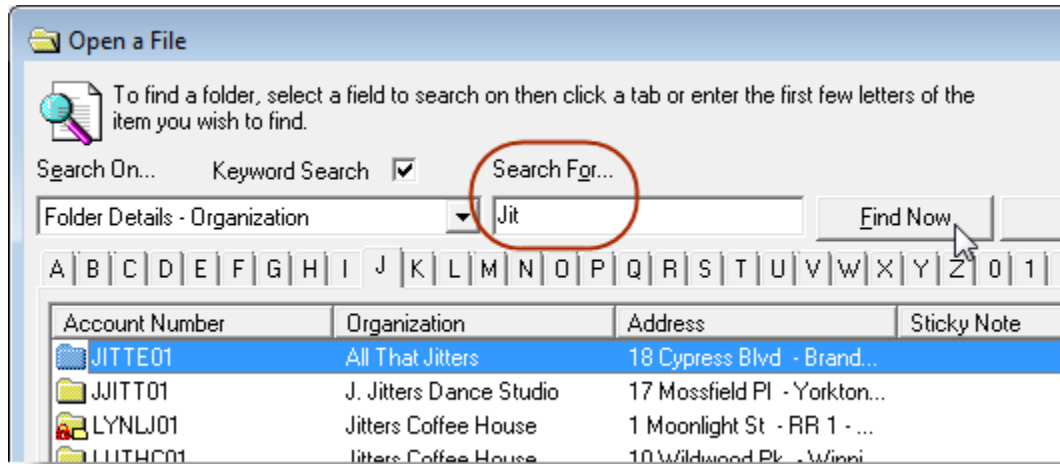
If the Keyword Search feature is enabled for the same search, the search would return all folders with the word "Jitters" **anywhere** in the folder name (see Figure 2.4).

(Figure 2.4)



The user needn't enter the entire word for the Keyword Search feature to effectively return results – even entering a portion of any word in the folder name will allow the user to find every folder containing that particular grouping of letters anywhere in the folder name (see Figure 2.5).

(Figure 2.5)



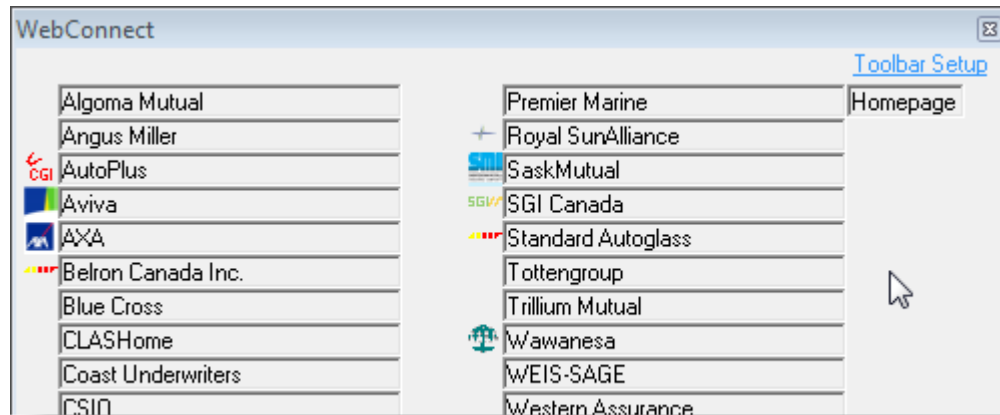
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### 3. Expanded WebConnect Company List

We are pleased to announce that the list of companies accessible through TBW's WebConnect feature has been expanded, in response to requests by TBW clients.

The WebConnect feature allows the TBW user to quickly and conveniently access specific company websites directly from the TBW window. When the TBW user clicks the **WebConnect button** on the TBW toolbar, the list of companies available through WebConnect opens in the **WebConnect window** (see Figure 3.1).

(Figure 3.1)



This list has been expanded to include the following companies:

- Algoma Mutual
- Elliot Special Risks
- Encon
- Facility
- Frank Cowan
- Genmark
- Gold Book
- IBAO
- Jevco
- Marine Expert
- Markel
- Merit Insurance Premium Financing
- Ontario Motorcycle Association
- Optimum Insurance
- Pafco
- Pembroke
- Premier Marine
- Tottengroup

Note that the WebConnect window will now feature two columns to accommodate the increased number of companies accessible through WebConnect.

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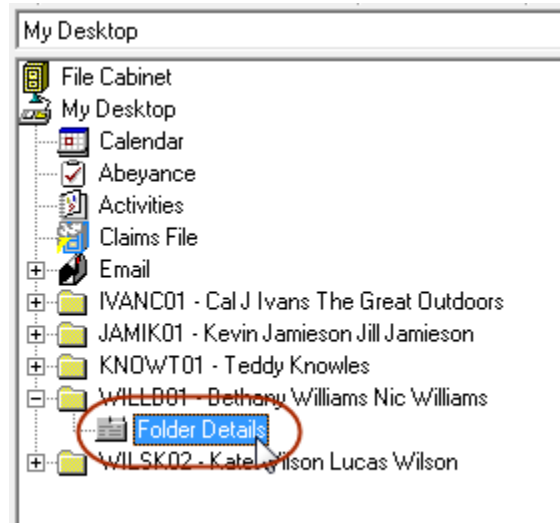
## 4. New Icon for Lapsed Policies

TBW clients have requested that lapsed policies be clearly distinguishable from active policies in a client's folder details. In response to this request, we are pleased to announce an enhancement that will allow the user to quickly identify a lapsed policy by its unique icon.



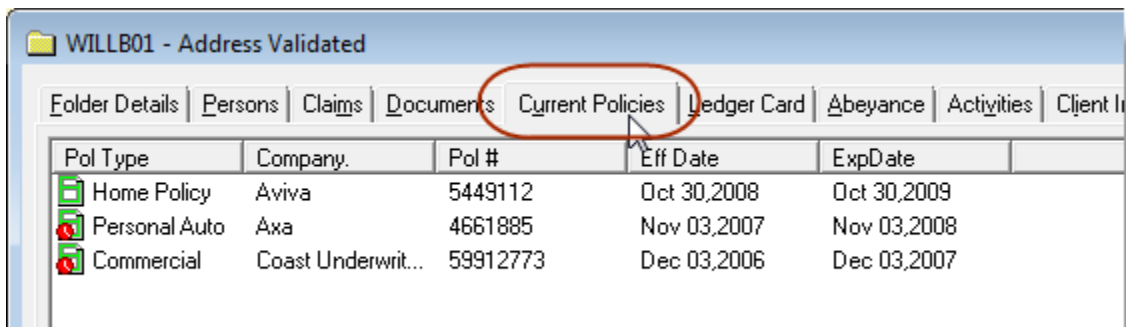
To view a client's current policies, double-click the client's **Folder Details** in the **Desktop Tree** (see Figure 4.1). The Folder Details window will open.

(Figure 4.1)



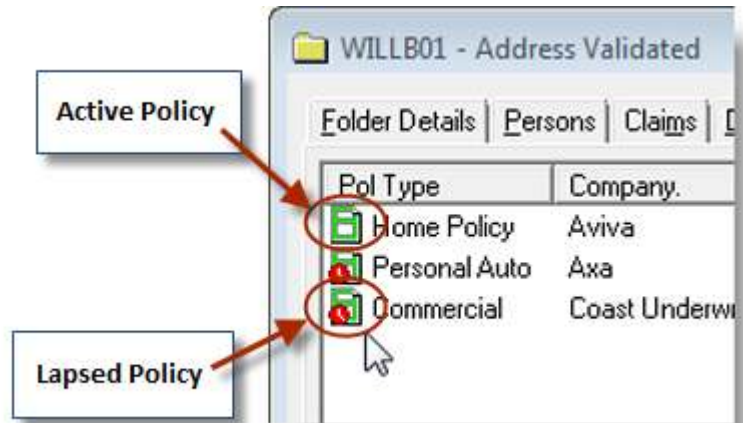
Click the **Current Policies** tab in the Folder Details window (see Figure 4.2). The client's policies will be listed in the window.

(Figure 4.2)



Note that any lapsed policy will be visually distinguishable from active policies by its unique folder icon (see Figure 4.3).

(Figure 4.3)



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## 5. Motorcycle VIN Search

TBW Users have asked for the ability to search for motorcycle vehicle details based on the motorcycle VIN. We are pleased to announce the development of a new functionality that allows a VIN Search for motorcycles.

When completing the IQ Coverage Item Wizard for a motorcycle, simply enter the motorcycle's VIN in the designated field, and then click the **Find Vehicle button** (see Figure 5.1).

(Figure 5.1)

Coverage Item Wizard - Step 2 of 9 -

**Vehicle Details**  
Select the vehicle here.

Year:

Manufacturer:

Model:

VIN:

Body Type:

Vehicle Use:  In Storage

Vehicle Code:

**Find Vehicle...**

Set Defaults < Back Next > Cancel

Details for the motorcycle will automatically be entered in the other fields in the window. The user can then complete the remaining steps of the Wizard.

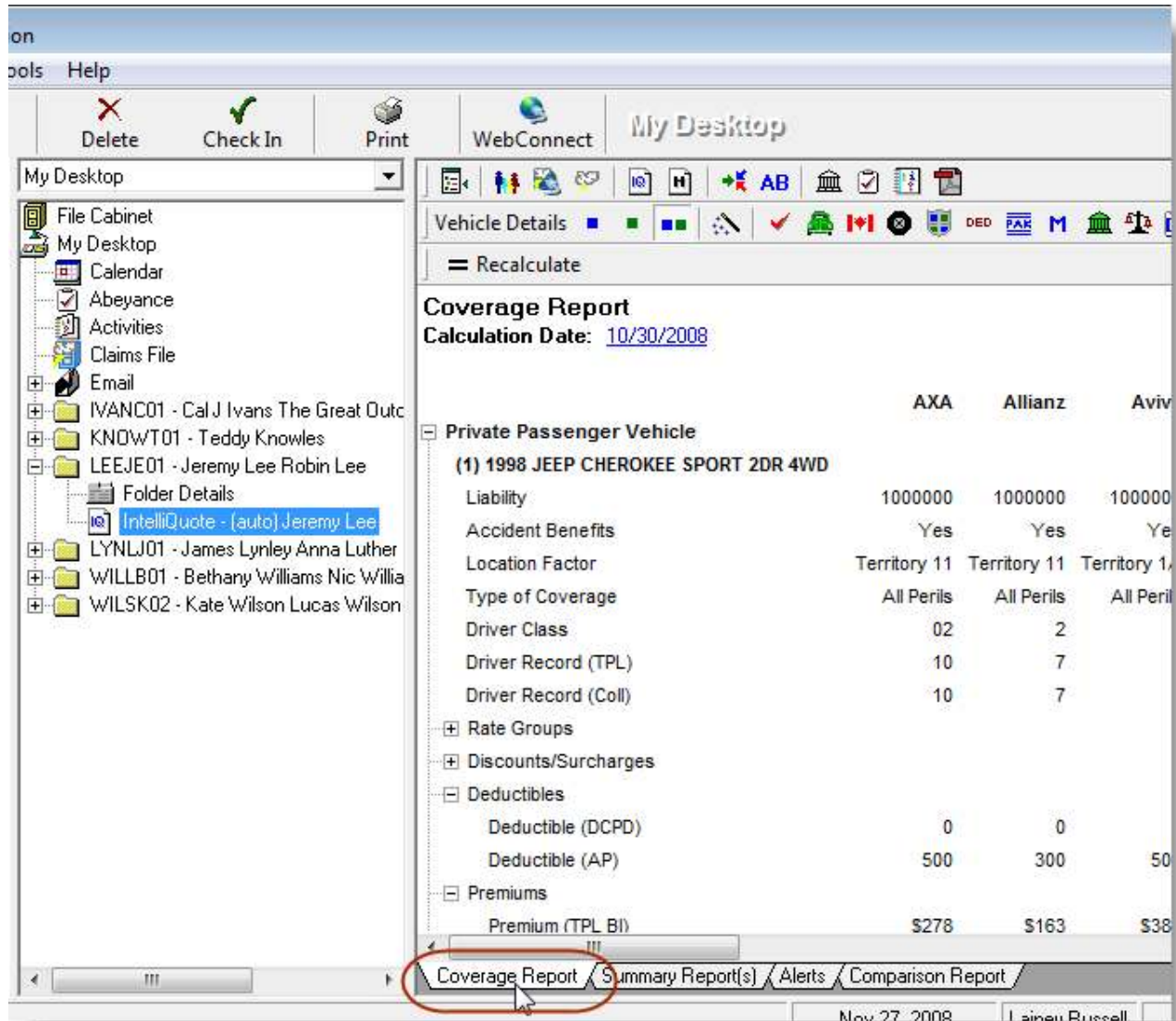
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## 6. Enhanced Auto Coverage Report

In response to requests from TBW clients for an Auto Coverage Report that is more informative and easier to navigate, this report has been enhanced to include more information, as well as the ability to collapse or expand sections of the report to create a more compact or more detailed report, as desired.

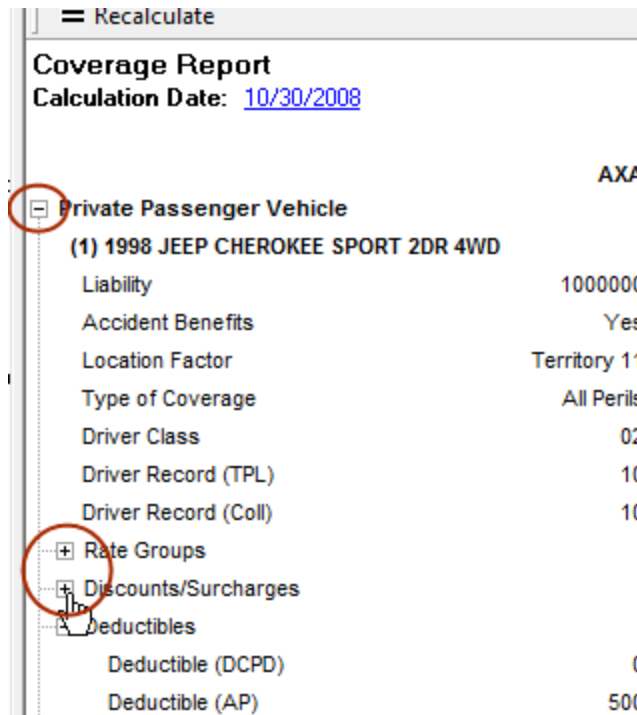
Once the Auto IntelliQuote has been completed, the enhanced **Auto Coverage Report** can be viewed in the Document Window (see Figure 6.1)

(Figure 6.1)



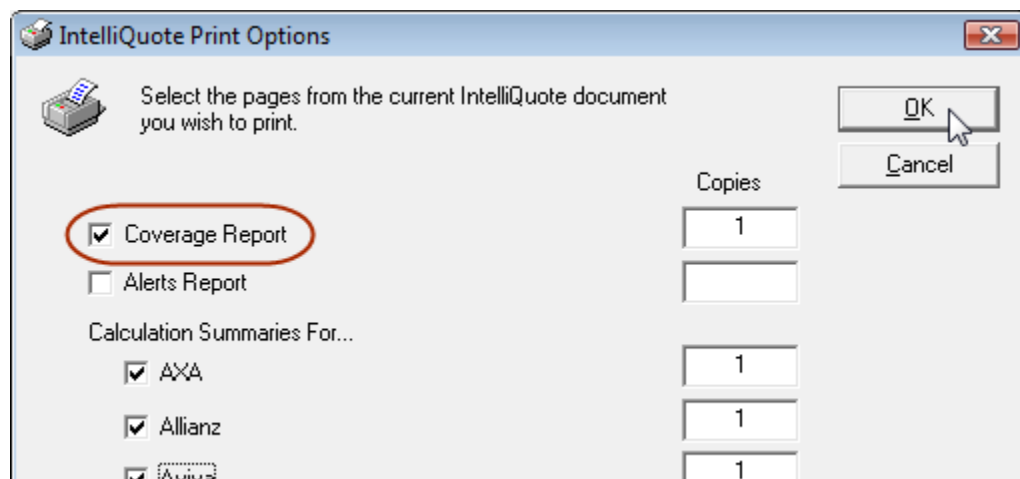
To collapse or close a category and make the report more compact, click the **minus (-)** sign beside an item. To view more detail in a particular section of the report (such as *Rate Groups* or *Discounts / Surcharges*), simply click the **plus (+)** sign to expand (open) that section (see Figure 6.2).

(Figure 6.2)



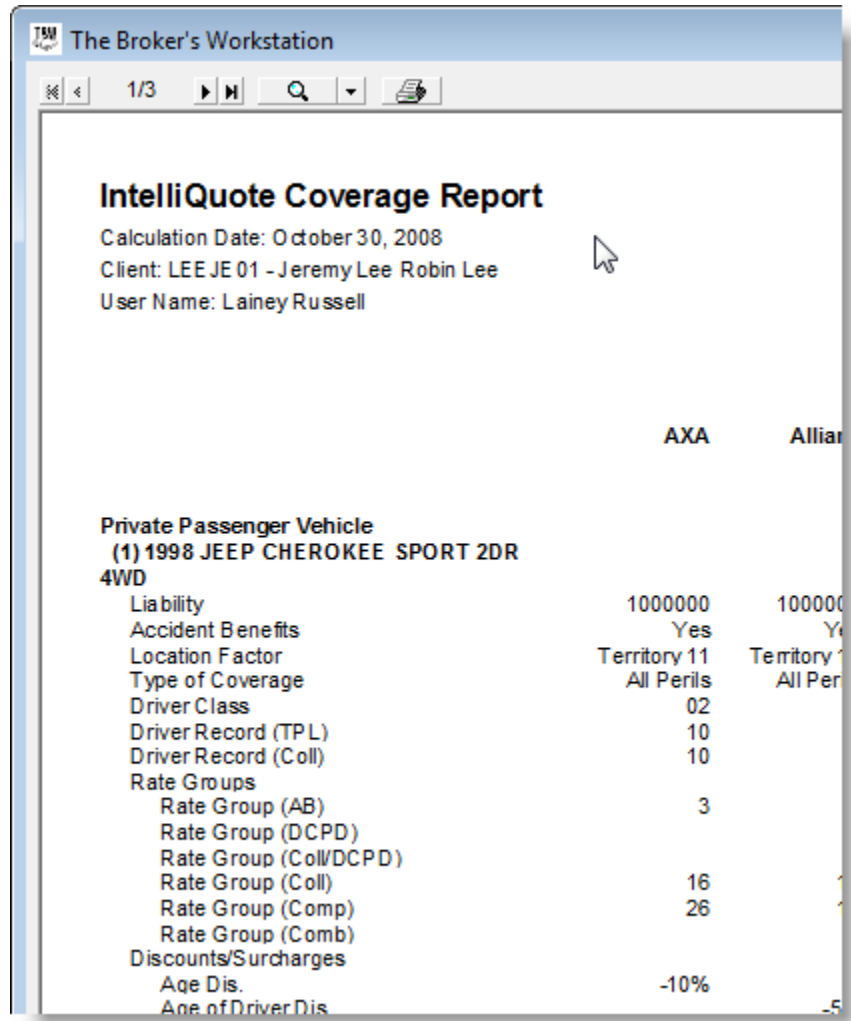
A printed copy of the Auto Coverages Report will also reflect these newest enhancements. To print the Auto Coverages Report, click **File, Print**, or click the **Print button** on the TBW toolbar. In the **IntelliQuote Print Options** dialogue box that appears, select the specific page(s) to print, and enter the number of copies (see Figure 6.3).

(Figure 6.3)



Note that all information in the report will be printed and the document will expand onto multiple pages if required. If the **Print Preview option** is enabled (through Tools, Options, Printing), the Auto Coverage Report, with all of its details, can be viewed before printing (see Figure 6.4).

(Figure 6.4)



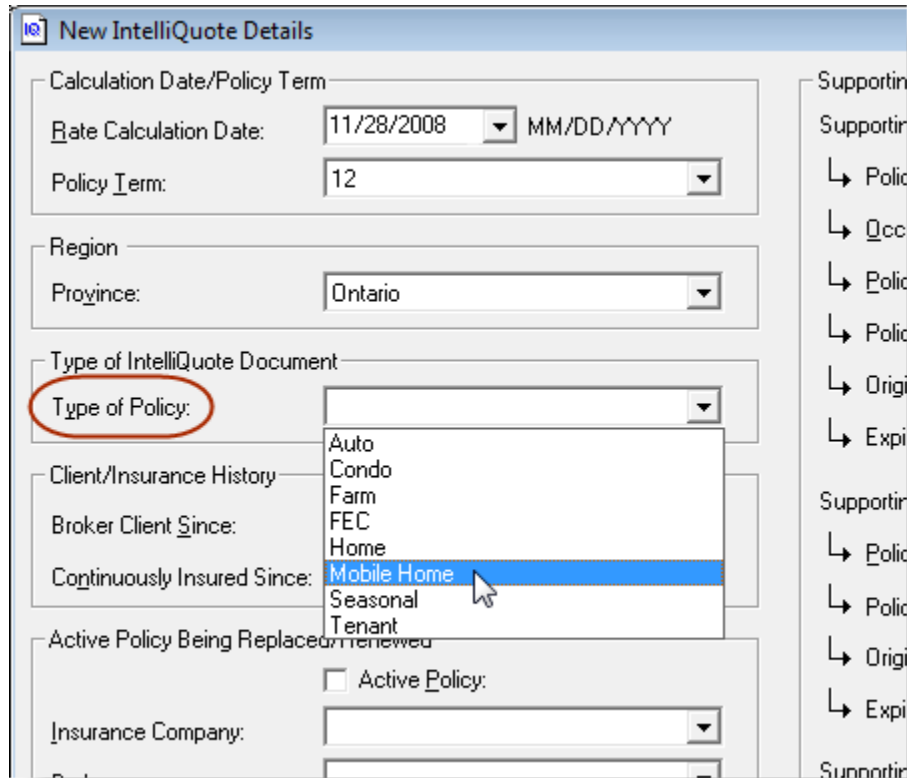
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## 7. Manual Rating of Mobile Homes with Aviva Elite

The TBW user can now choose to manually input premiums into mobile homes for Aviva Elite.

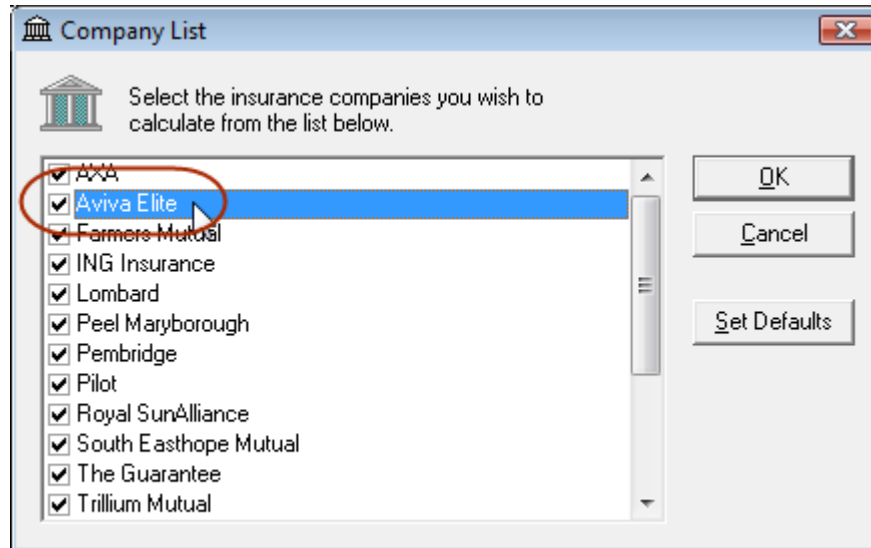
Once the IntelliQuote icon has been dragged and dropped onto the client's folder in the Desktop Tree, the **New IntelliQuote Details** window will open. In this window, select "Mobile Home" under *Type of Policy* (see Figure 7.1).

(Figure 7.1)



In the **Company List** window, **Aviva Elite** will now be available as one of the Insurance Company options (see Figure 7.2).

(Figure 7.2)



While working through the **Coverage Item Wizard**, the **Coverage Limits window** allows the user to enter coverage limits for the mobile home for Aviva Elite (see Figure 7.3).



(Figure 7.3)

Coverage Item Wizard - Step 7 of 12 - Primary Item

**Coverage Limits**  
 Enter the Coverage Limits for this coverage item.  
 Hint: Type Ctrl+A to copy the current value to all companies.

Enter the replacement value of this item.

Replacement:

Enter the coverage limits here

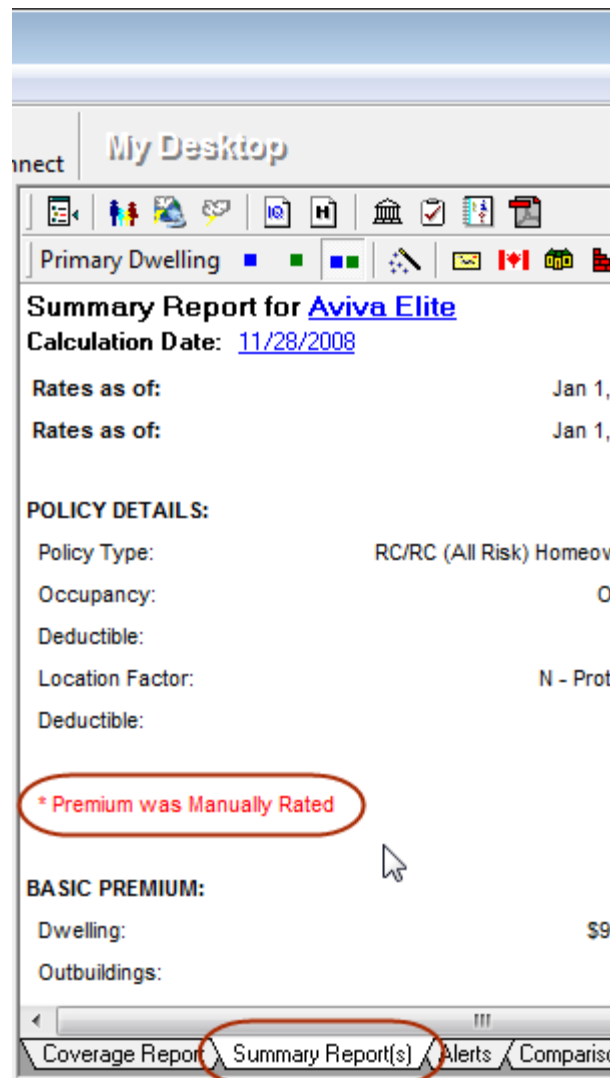
Coverage	Percent Of RC	Building Rate	Building Premium	Conte
Aviva Elite	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Use the scroll bar to view and complete all fields.

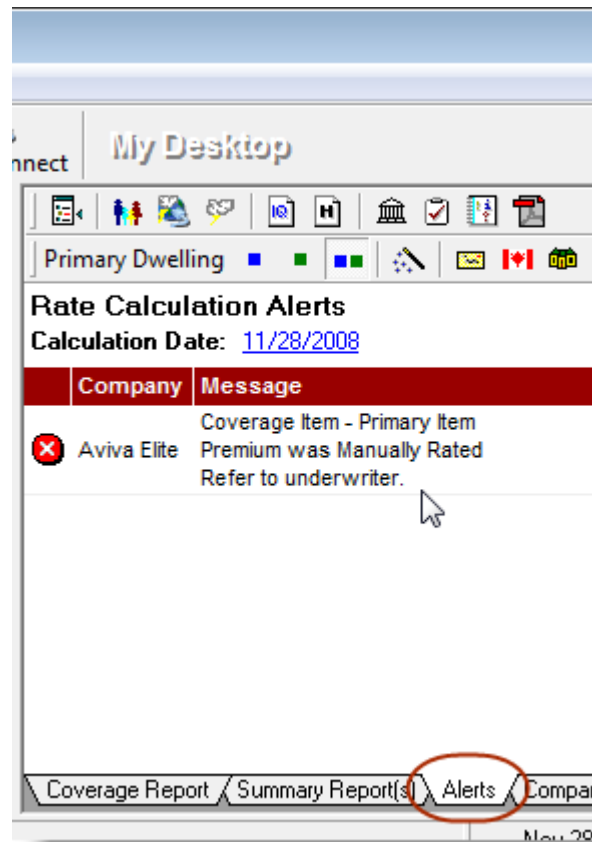
Set Defaults < Back Next > Cancel

Once the IntelliQuote has been completed, the **Coverage and Summary Reports** will reflect the coverage limits entered. Note that the Summary Report and the Alerts page will indicate that the premium was manually rated (see Figures 7.4 and 7.5).

(Figure 7.4)



(Figure 7.5)



**IMPORTANT NOTE** Additional Company options for manual rating of mobile homes will soon be available.

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Please share this information with all TBW users in your office(s). Once you have reviewed this document, if you have any questions regarding these enhancements and features, or need further assistance in their usage, please contact our Support Team at 1-888-291-3588 (toll-free telephone).

Thank you for using **The Broker's Workstation**.

Yours sincerely,

Custom Software Solutions Inc.

