



9 March 2009

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

1. [Transfer a Policy from One Client Folder to Another](#) – TBW users can now transfer I-Biz/CSIO policy documents between client folders.
2. [New Sales Tax and Interest / Payment Plan Fields on the Application Wizard for Ontario Clients](#) – For our Ontario clients, the Application Wizard will now include a field for Sales Tax and another for Interest / Payment Plan Charges.
3. [Expanded WebConnect Company List](#) – The list of companies and services accessible through the TBW WebConnect feature continues to be expanded.

1. Transfer a Policy from one Client Folder to Another

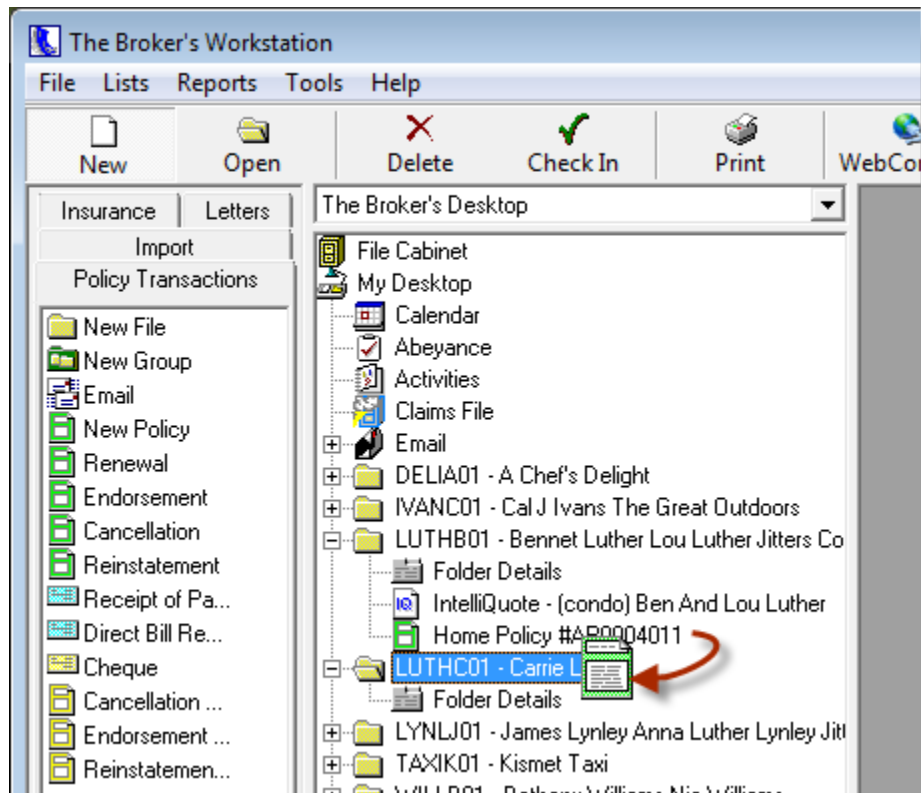
TBW clients have asked for the ability to transfer a policy between client folders. In response to this request from our users, we are pleased to announce an enhancement to TBW that allows the user to move an existing I-Biz/ CSIO policy from one client folder to another client folder.

To transfer a policy from one client folder to another, first check out the **source folder** (the client folder holding the policy document). Next, either check out or create the **target folder** (the client folder to which the policy will be moved).

Then, check out the policy transaction you wish to move from the source folder to the target folder. Note that TBW will automatically use data from the latest policy document, regardless of which document you transfer.

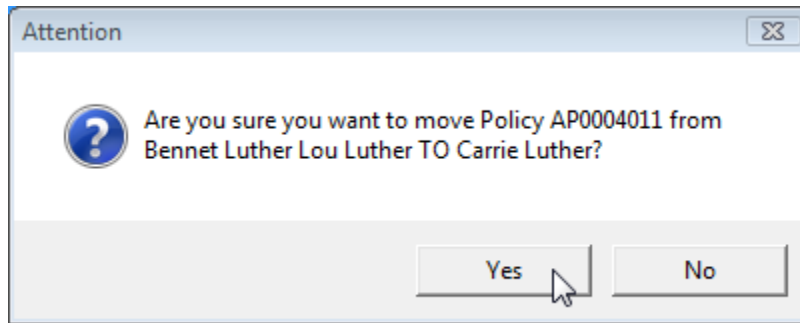
To transfer the policy, simply drag and drop the policy from the source folder to the target folder in the Desktop Tree (see Figure 1.1).

(Figure 1.1)



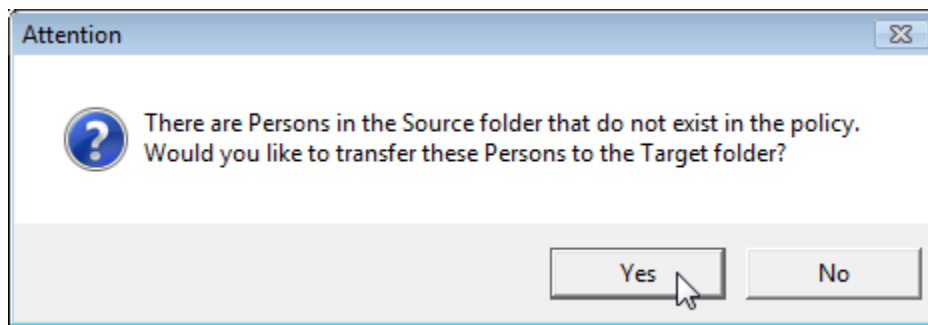
Then, in the **Attention window** that appears, click **Yes** to move the policy from the source folder to the target folder (see Figure 1.2).

(Figure 1.2)



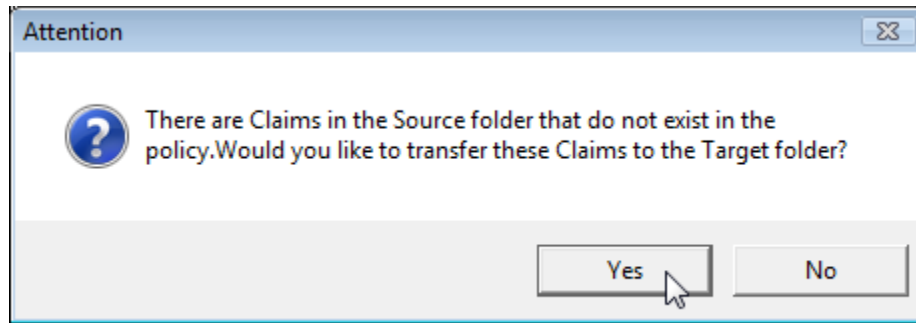
If there are **Persons** in the source document or source folder that do not exist in the target folder, you will be asked if you would also like to transfer these Persons to the target folder. In the **Attention dialogue box**, click **Yes** to transfer the Persons to the target folder, or click **No** to transfer the policy without the Persons (see Figure 1.3). Note that transferring a Person will not remove that Person from the source folder; rather, the Person will now be listed in both folders.

(Figure 1.3)



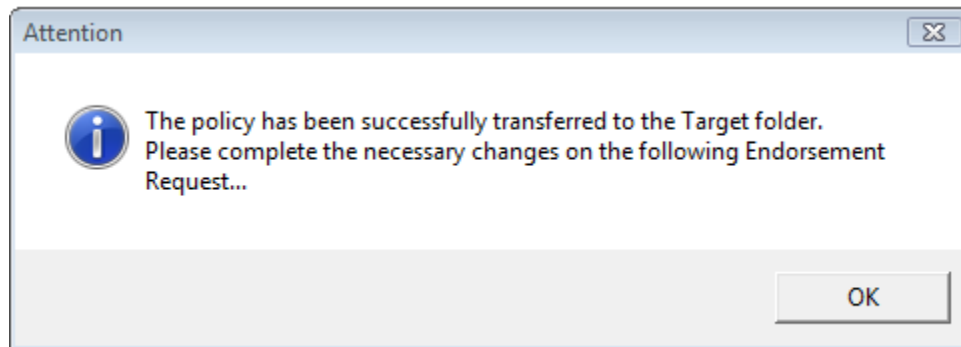
You will also be asked if you would like to transfer any Claims that exist in the source document or folder, but not in the target folder. In the **Attention window**, click **Yes** to copy the Claims to the target folder, or click **No** to transfer the policy without the Claims (see Figure 1.4). Note that transferring a Claim to the target folder will not remove the Claim from the source folder – the Claim will now be included in both folders.

(Figure 1.4)



Once the policy transfer has been successfully completed, an **Endorsement Request** will be created automatically in the target folder regarding applicable changes to the policy (client mailing address, persons attached to the policy, etc.). You will be prompted to make any necessary changes to the request. Click **Yes** in the **Attention Window** (see Figure 1.5), and then edit folder details as required.

(Figure 1.5)



Next, make changes as needed in the **Endorsement Request window** (see Figure 1.6) and click **OK**.

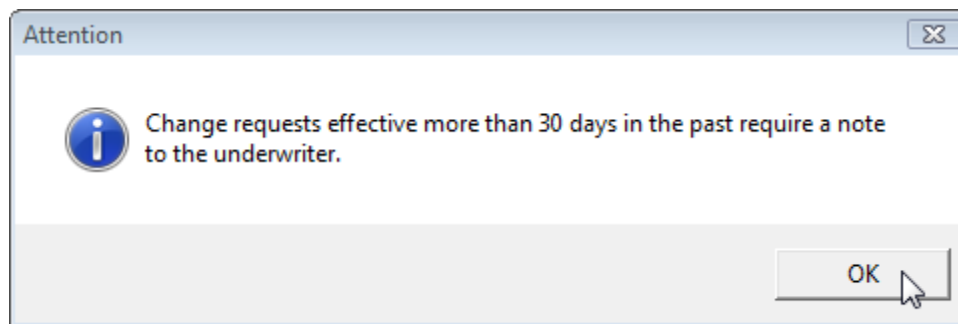
(Figure 1.6)

The screenshot shows a window titled "Endorsement Request" with a close button in the top right corner. Below the title bar is a document icon and the text "Please enter all the data to create an Endorsement Request." The form contains the following fields:

- Agency: W. S. Goodall Insurance Ltd. (dropdown)
- Branch: Main Branch (dropdown)
- Department: Main Department (dropdown)
- Description: Endorsement Request (text box)
- Eff/Exp Date: 12/13/2008 (dropdown), 12/12/2009 (dropdown), MM/DD/YYYY (text)
- Policy Number: AP0004011 (text box)
- Billing Type: Agency Bill (dropdown)
- Change Premium: 543 (text box) with a "Coverages..." button to its right
- Term Premium: (empty text box)
- New Annualized Premium: 0 (text box)

If the change request is effective more than 30 days in the past, a note to the underwriter is required. Click **OK** in the **Attention window** that appears (see Figure 1.7), and then add a broker note in the **Annualized Premium window** (see Figure 1.8). Click **OK** again.

(Figure 1.7)



(Figure 1.8)

Please enter any additional Broker Notes to the underwriter below...

This policy has

I

OK

When the policy move has been completed, the transferred policy can no longer be endorsed, cancelled, or reinstated in the source folder. The **source folder** will identify the policy as transferred in the following locations:

- The policy will be listed in red in the source folder's **General Details** (see Figure 1.9) to indicate that the policy has been transferred to another client folder.

(Figure 1.9)

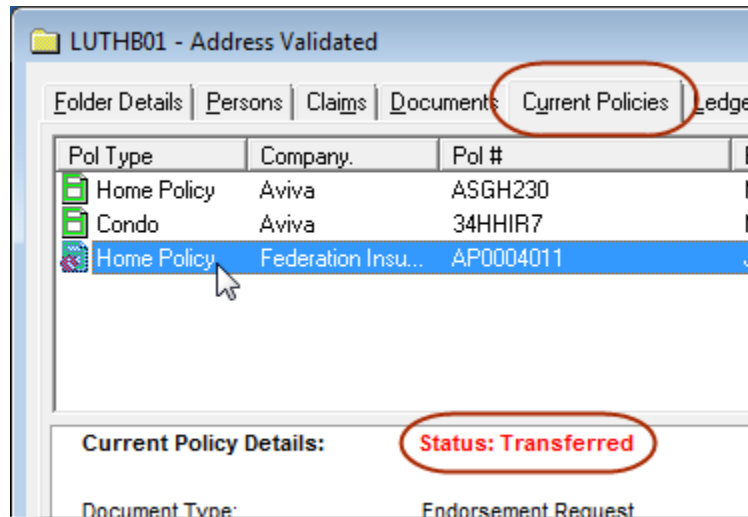
CSR2:
CSR3:

POLICIES:

Policy Number	Policy Type	Company
ASGH230	Home Policy	Aviva
34HHR7	Condo	Aviva
AP0004011	Home Policy	Federation Insurance

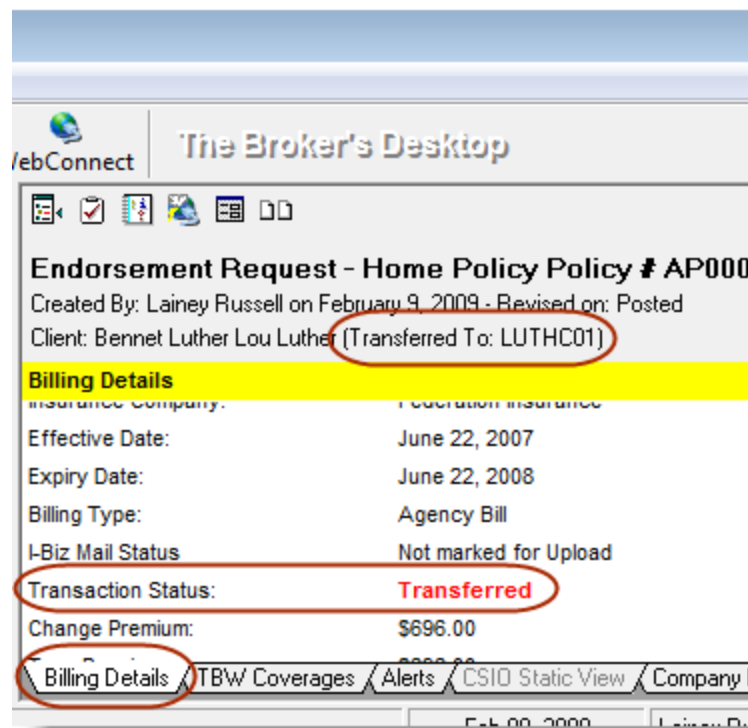
- On the **Current Policies** tab in **Folder Details**, the policy status will be shown as **“Transferred”** (see Figure 1.10).

(Figure 1.10)



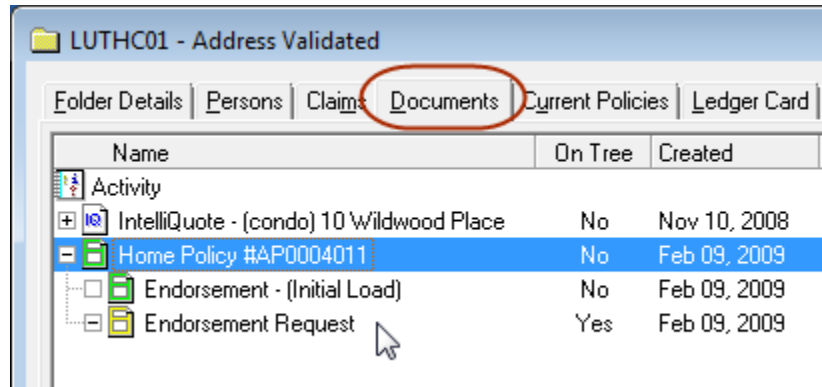
- Also, when the policy is opened in the Document Window, the **Transaction Status** on the **Billing Details** tab will label the policy as **“Transferred”** (see Figure 1.11).

(Figure 1.11)



In the **target folder**, a New Policy, Initial Load, and Endorsement Request (which is ready to upload) will appear on the **Documents tab** (see Figure 1.12). The System Date will be assigned automatically as the date of creation.

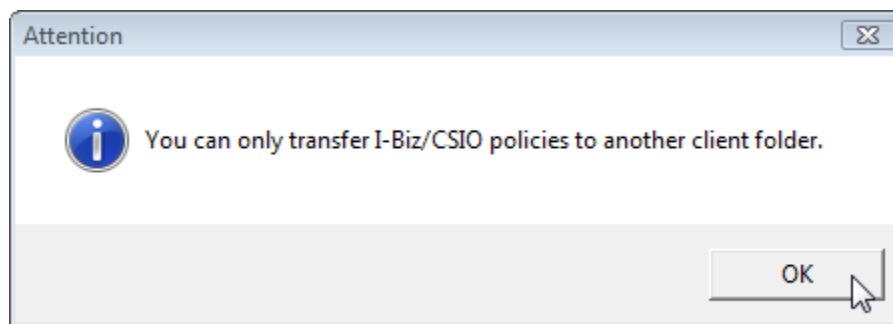
(Figure 1.12)



Please also note the following when using the Policy Transfer feature:

- No accounting data relevant to the policy will be changed in the source folder.
- Also, no accounting data will be moved, so no new accounting information regarding the transferred policy will appear in the target folder.
- If any Persons and/or Claims were transferred to the target folder, these Persons and Claims will now be included both in the source folder and in the target folder.
- This Policy Transfer feature is available only for I-Biz/CSIO (downloaded) policies. If you attempt to transfer a manual policy, the following **Attention window** will appear (see Figure 1.13):

(Figure 1.13)



- User rights for Policy Transfer must be enabled (through Tools, Administrative, User Manager, Rights) before a TBW user can utilize this feature.

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2. Sales Tax and Interest / Payment Plan Fields on the Application Wizard

We are pleased to announce that the Application Wizard will now include a field for Sales Tax and another for Interest / Payment Plan Charges as an enhancement for our Ontario clients. These fields will appear in the Billing Details step of the Application Wizard (see Figure 2.1) for both habitational and auto applications.

(Figure 2.1)

Application Wizard

Billing Details
Please enter all the appropriate billing details.

Billing Method	<input type="text"/>	*
Payment Plan	<input type="text"/>	*
Amount Paid Now	<input type="text"/>	*
Payment Type	<input type="text"/>	
Policy Premium	\$1,487	
Sales Tax	<input type="text"/>	
Interest/Payment Plan Charges	<input type="text"/>	
Total Estimated Cost		
Financial Institution	<input type="text"/>	

To add Sales Tax and/or Interest / Payment Plan Fees to the Policy Premium, simply click and type the desired information in the new fields. Note that the **Total Estimated Cost** will be updated automatically with the total amount (see Figure 2.2).

(Figure 2.2)

Policy Premium	\$1,487	
Sales Tax	118.96	
Interest/Payment Plan Charges	<input type="text"/>	
Total Estimated Cost	\$1,605.96	
Financial Institution	<input type="text"/>	

Once the Application Wizard has been successfully completed, the Sales Tax and Interest / Payment Plan amounts, as well as the Total Estimated Cost, will appear in the completed Application Form (see Figure 2.3).

(Figure 2.3)

9					Remarks - Use this space if you have further details									
					Extra sheets attached. <input type="checkbox"/>									
10										Method of Payment				
Type of Payment Plan		Estimated Policy Premium**		Provincial Sales Tax		Interest		Total Estimated Cost						
		\$1,487		118.96		\$15.00		\$1,620.96						
Amt. Paid with Application		Amount Still Due		No. of Remaining Instalments		Amount of Each Instalment		Instalment Due Date						
\$1,621														
<small>** This policy premium is estimated and subject to adjustment or confirmation by the insurer. If we issue a policy and the applicant cancels it, there may be a minimum premium shown on your Certificate of Automobile Insurance that will not be refunded.</small>														

Please note that this feature is relevant for our Ontario clients only.

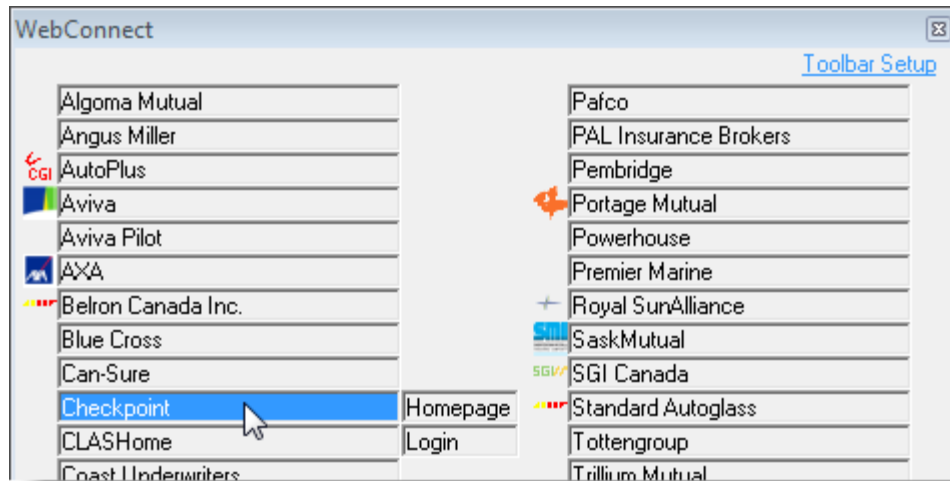
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3. Expanded WebConnect Company List

We are pleased to announce that the list of companies available through TBW’s WebConnect tool has been further expanded, in response to requests by TBW clients.

The WebConnect feature allows the TBW user to access specific insurance company and service bureau websites quickly and easily directly from the TBW interface. 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:

- **Checkpoint:** The Checkpoint link gives the user the option of opening or logging into the Checkpoint (Pre-Insurance Inspection System) website.
- **PowerHouse Web:** Use the PowerHouse link in the WebConnect feature to open or automatically log into the PowerHouse Web (Home Evaluation) website.

**** Please note that the Powerhouse WebConnect feature will be enabled by request and has a monthly maintenance and activation fee. ****

Access to TBW's WebConnect feature is controlled by User Rights (**Tools, Administrative, User Manager, Rights**).

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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 Client Services Team at clientservices@cssionline.com (email) or 1-888-291-3588 (toll-free telephone).

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

Yours sincerely,

Custom Software Solutions Inc.

