4 June 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)**:

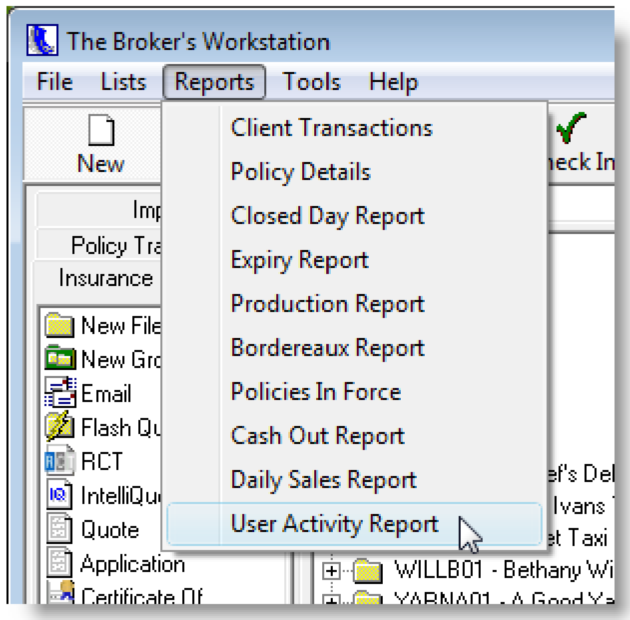
Contents

1. User Activity Report

We are pleased to announce an enhancement to TBW that allows the user to create a User Activity Report, which lists all documents created or transacted by one or more TBW users within a particular date range. This report provides a basic overview of document activity for the selected user(s) and time frame, including the date, activity type, client folder number, description, etc., for each document.

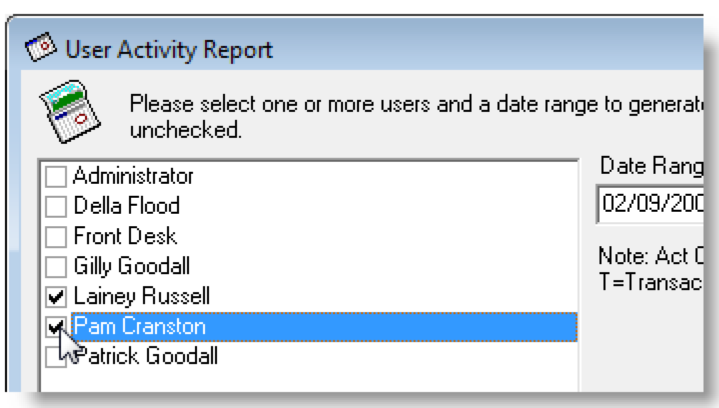
To create a User Activity Report, click **Reports**, **User Activity Report** (see Figure 1.1).

(Figure 1.1)



The **User Activity Report** dialogue box will open. To create the report, first select one or more **Users** by clicking in the applicable checkbox(es) (see Figure 1.2).

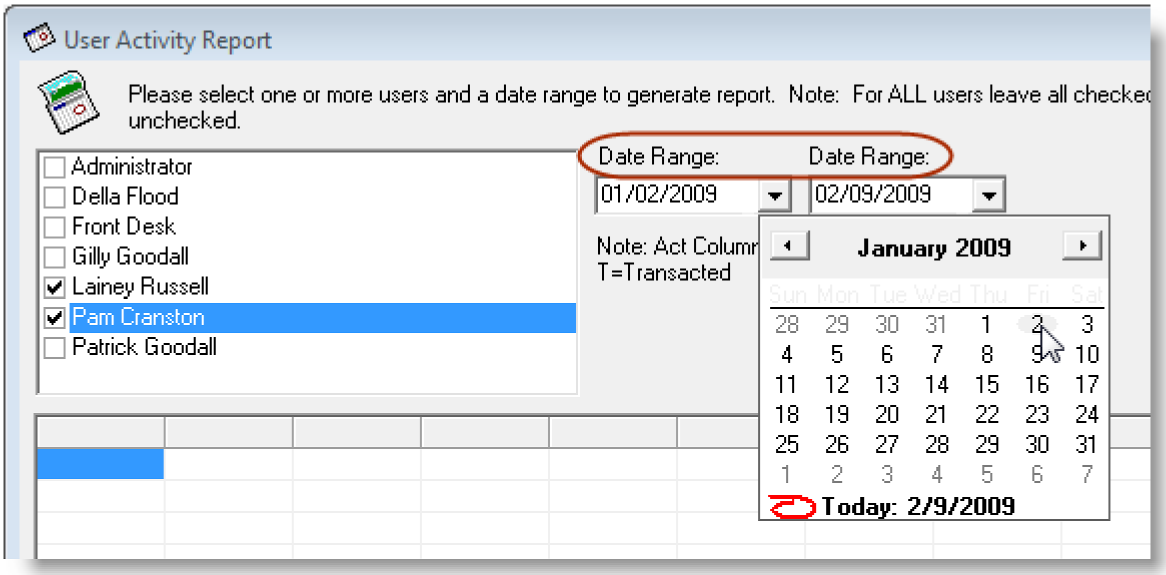
(Figure 1.2)



- Check all checkboxes *or* leave all checkboxes unchecked to view all activity for all users.

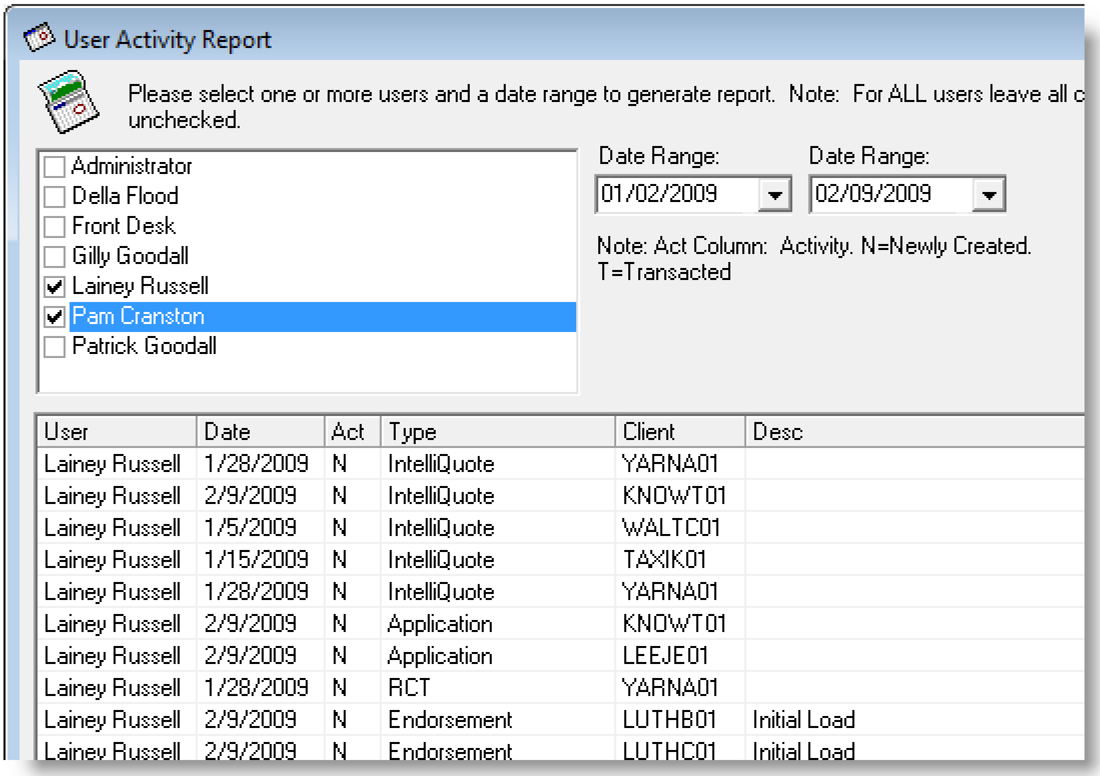
Then, enter the start date and end date for the report in the **Date Range fields**. To enter a date, either click the drop-down calendar and select the appropriate date (see Figure 1.3), or click and type the date in the field.

(Figure 1.3)



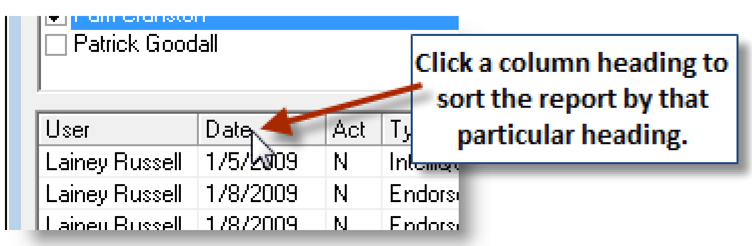
Click **OK**, and the **User Activity Report** will appear (see Figure 1.4). To recreate the report with different parameters (users and/or dates), enter the new details and click **OK** again.

(Figure 1.4)



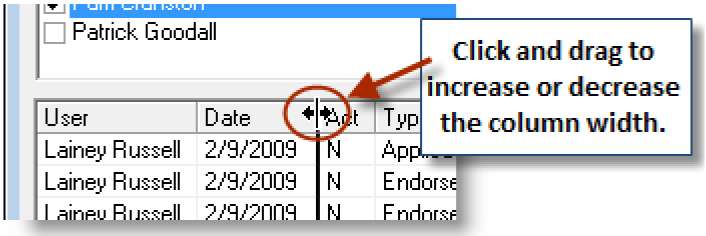
Note that the report can be sorted by column heading: Simply click the appropriate heading to sort the report by that particular category (e.g. Type, Date, Client, etc.) (see Figure 1.5).

(Figure 1.5)



To resize a column, hover your mouse over the line between the column headings; when the mouse pointer changes to a resizing arrow, click and drag to the desired column width (see Figure 1.6).

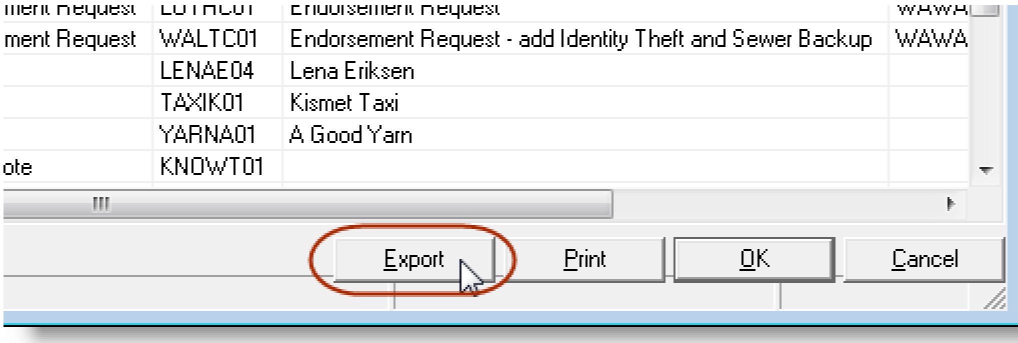
(Figure 1.6)



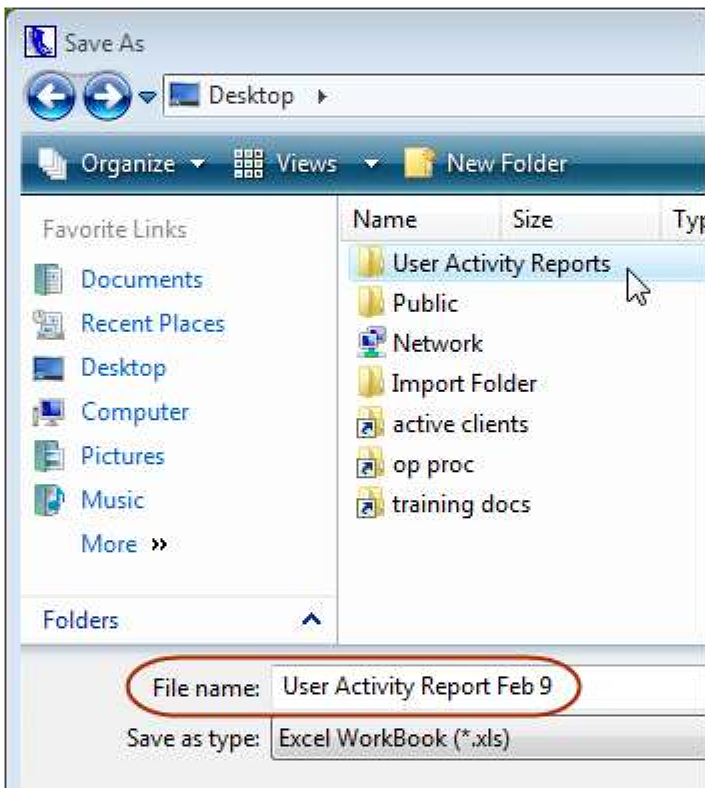
The User Activity Report can be printed by clicking the **Print** button. If the **Print Preview feature** is enabled (**Tools**, **Options**, **Printing**), the user can first preview and then print the report. Note that the report can also be saved as a PDF document from the Print Preview window.

The report can be exported to Microsoft Excel, as well, for viewing, editing, and/or formatting. Click the **Export** button (see Figure 1.7), and the **Save As window** will open. Assign a **File Name** to the report, select the destination folder where the report will be saved (see Figure 1.8), and then click **Save**.

(Figure 1.7)

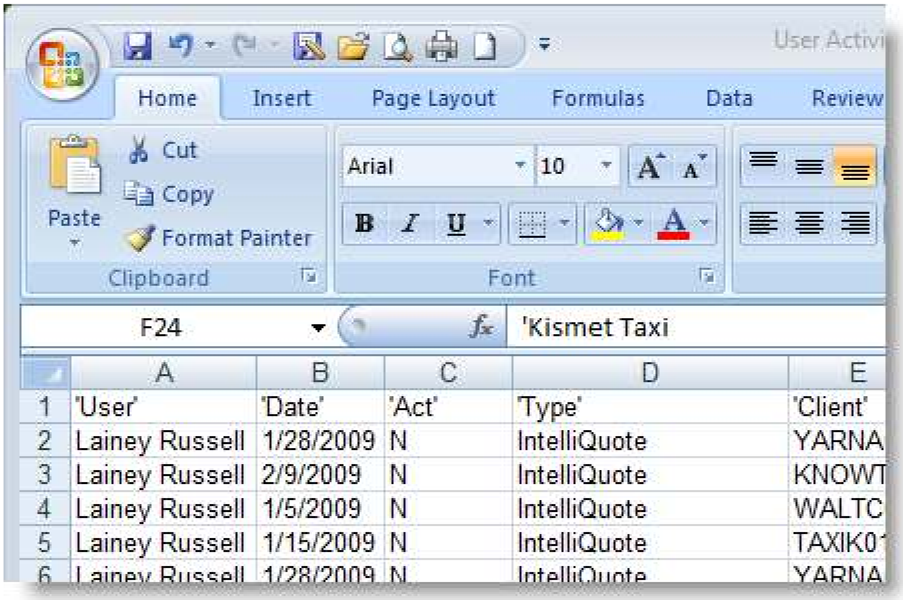


(Figure 1.8)



To view the report in Excel, close the User Activity Report window, and then open Microsoft Excel. Click the **Open** button, and find and double-click the recently saved report in the **Open dialogue box**. The report data will appear in the Excel window and can be formatted, printed, edited, etc., as required (see Figure 1.9).

(Figure 1.9)



Please note that user rights must be enabled (through **Tools**, **Administrative**, **User Manager**, **Rights**) for this feature before the TBW user can utilize the User Activity Report.

Please note that this feature is available only on the SQL database platform.

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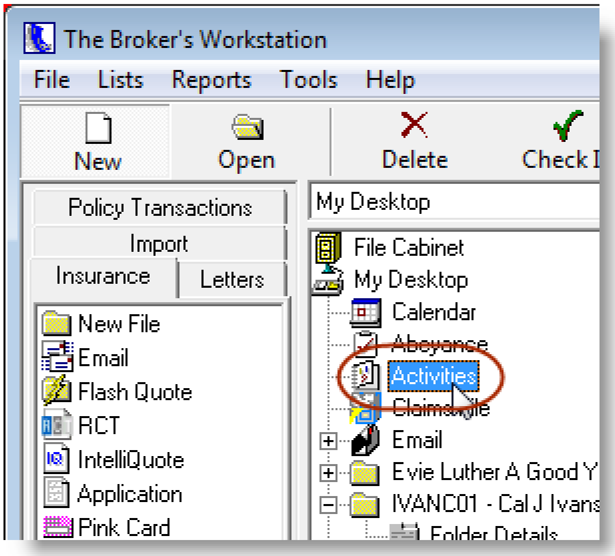
2. Activity Types

TBW users have requested the ability to more specifically categorize Activities. In response to this request, we are pleased to announce an enhancement that will allow the user to label and manage Activities by user-defined "**Types**." Previously, an Activity could be categorized by **Description**, **Method**, and **Category**; now, the Activity can be further classified by **Type**.

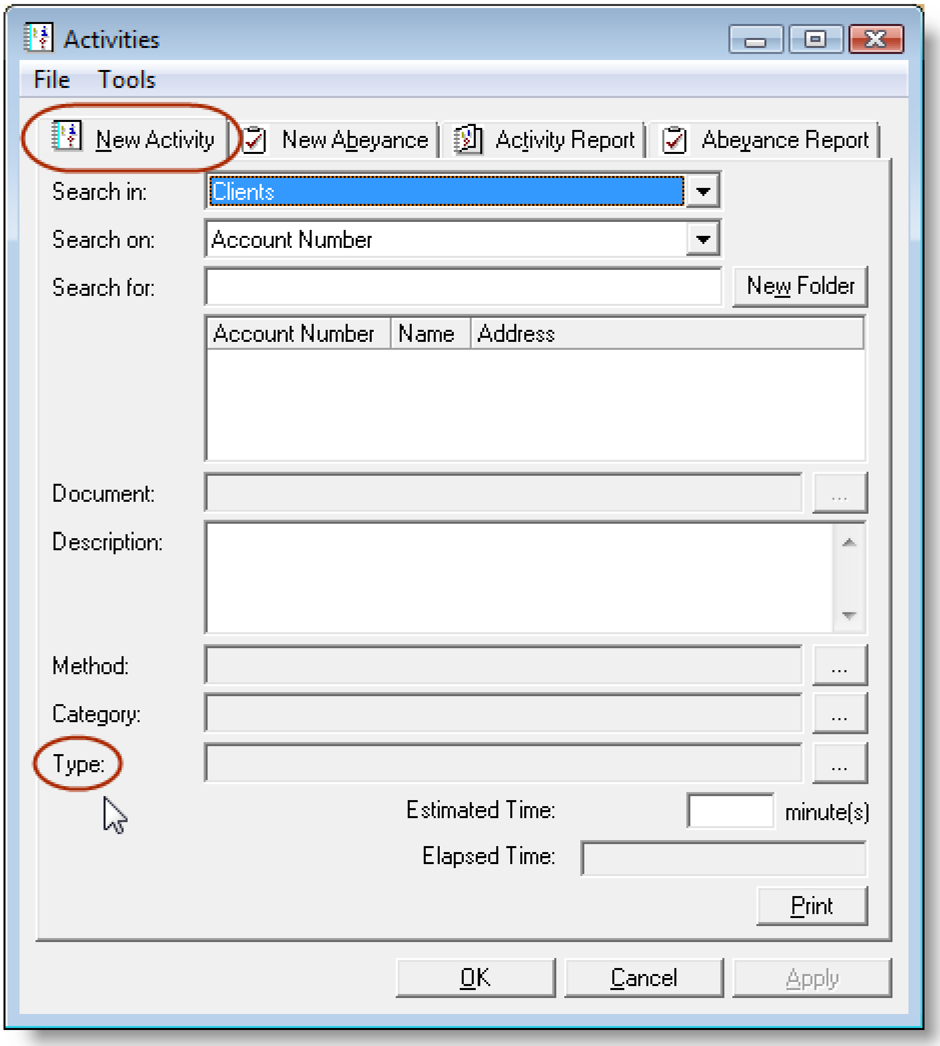
To create a New Activity, open the **Activities** dialogue box by double-clicking the **Activities** icon in the **Desktop Tree** (see Figure 2.1).

(Figure 2.1)



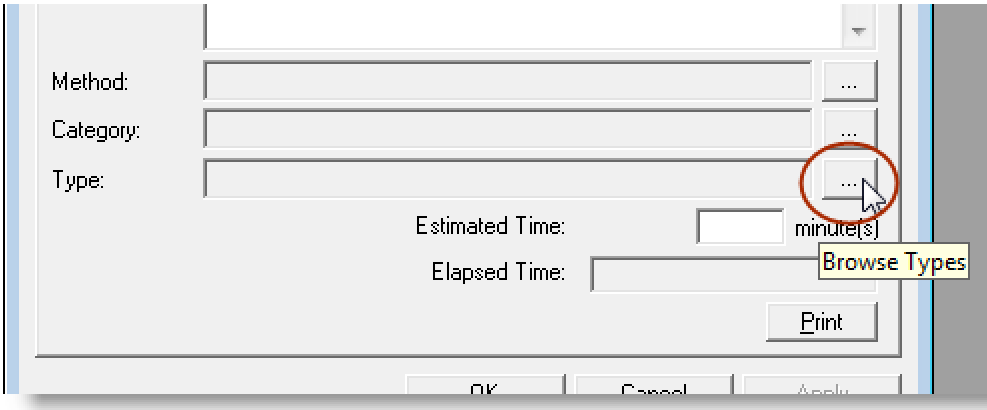
The new **Activity Type** feature is located directly beneath the Category option on the **New Activity tab** in the Activities dialogue box (see Figure 2.2).

(Figure 2.2)



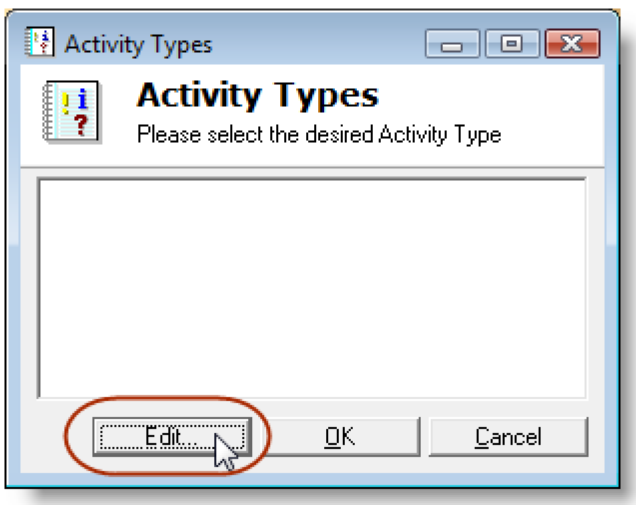
Because Activity Types are user defined, the user must determine and enter specific Activity Types before he/she can use them to categorize Activities. To enter Types, click the **Browse Types** button beside the **Type** field (see Figure 2.3).

(Figure 2.3)



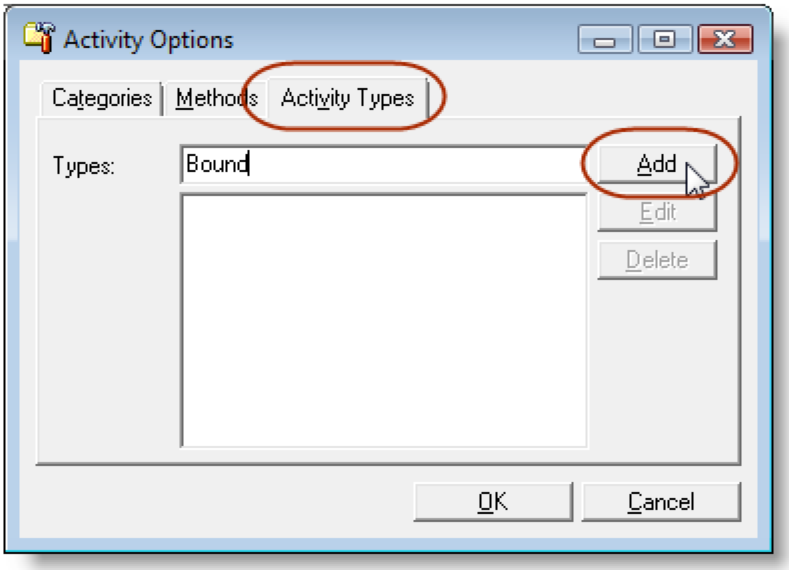
In the **Activity Types** window that opens, click the **Edit** button (see Figure 2.4).

(Figure 2.4)



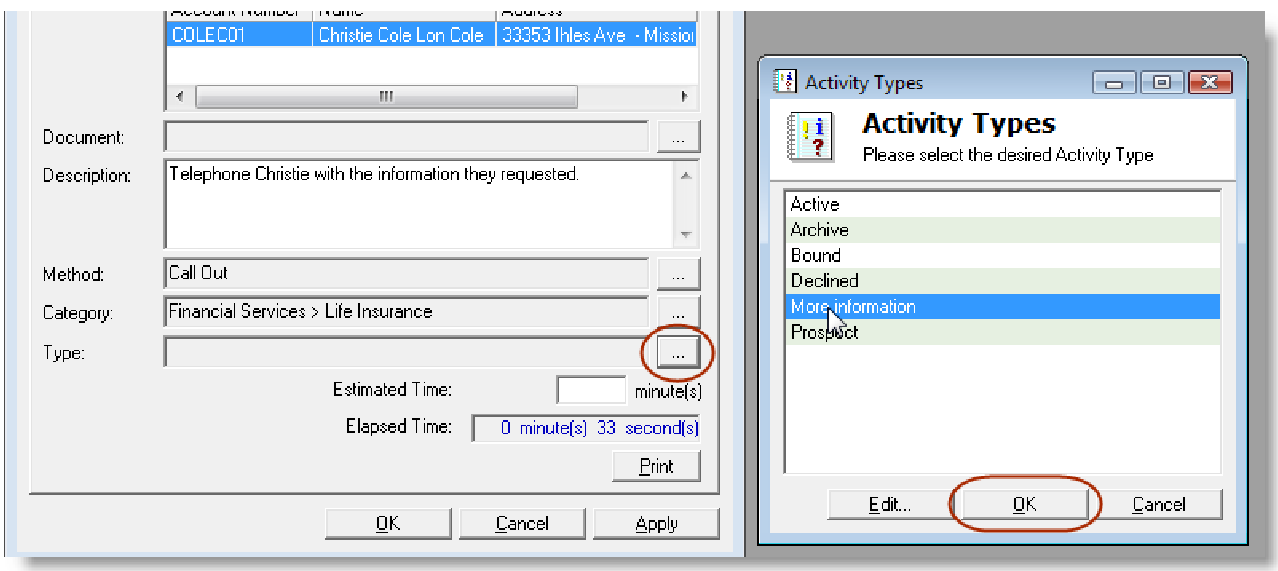
Then, on the **Activity Types** tab in the **Activity Options** window, click in the **Types** field and enter a specific Type (see Figure 2.5). Click the **Add** button, and the Type will be moved to the Types box. Repeat these steps to add as many different Activity Types as you wish.

(Figure 2.5)

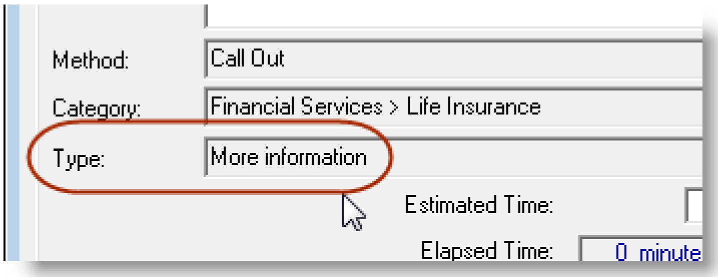


Once the user has decided upon and entered the Activity Types, they can be used to categorize Activities. When creating a new Activity in the Activities window, click the **Browse Types** button to select an appropriate Type. Then, in the Activity Types window, select the relevant Type and click **OK** (see Figure 2.6). The selected Type will be entered in the Type field (see Figure 2.7).

(Figure 2.6)

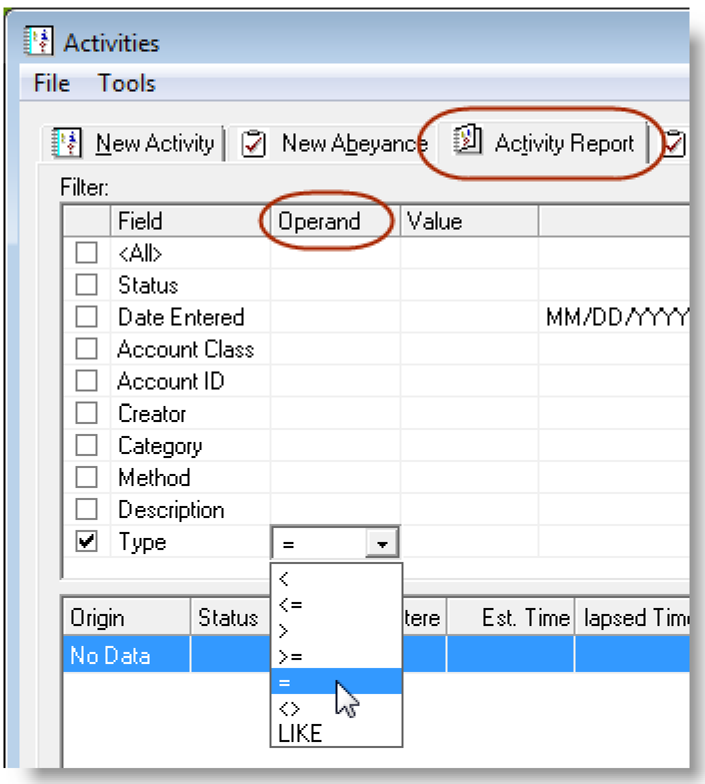


(Figure 2.7)



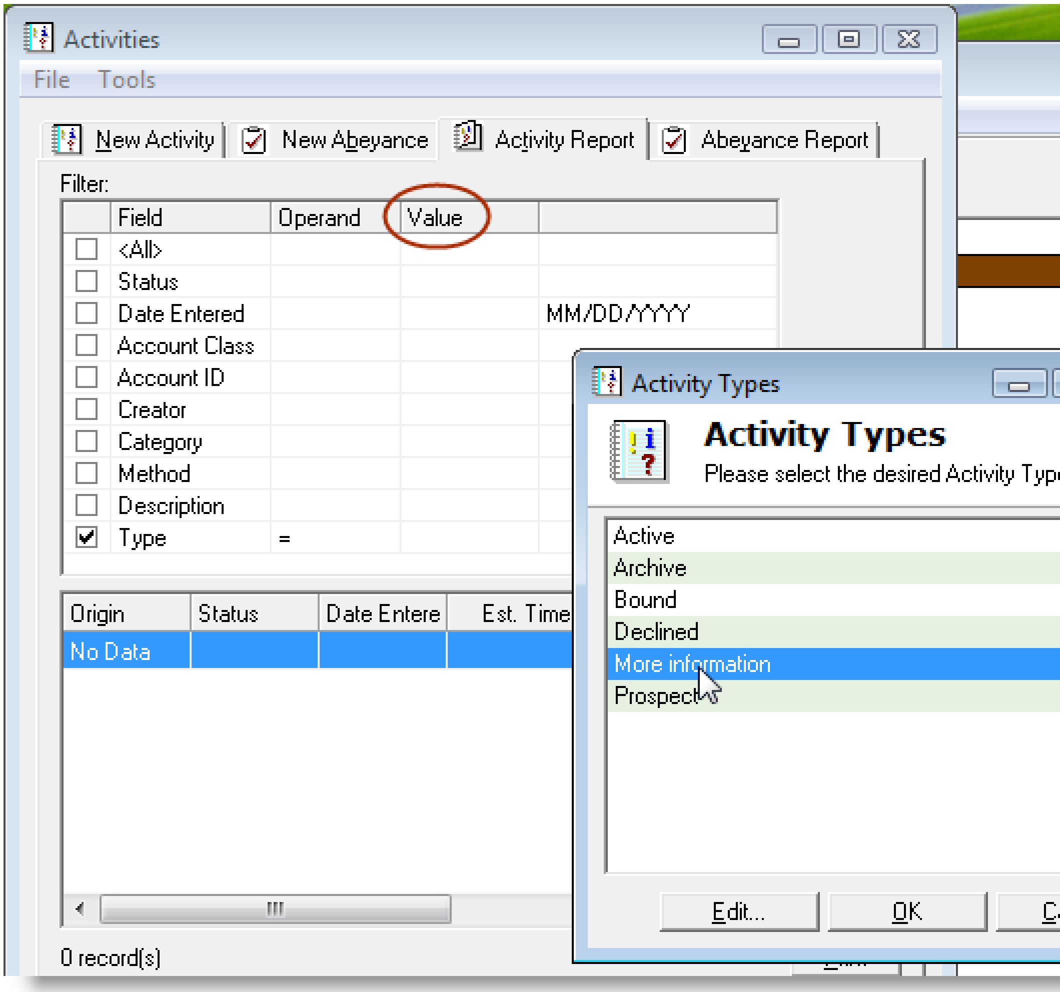
Activity Types can also be used to search for and sort Activities. Double-click the Activities icon on the Desktop Tree to open the Activities dialogue box, and then click the **Activity Report** tab. To create an Activity Report based on a certain Activity Type, click in the **Type checkbox**, and then click the drop-down menu in the **Operand column** to select an operand (see Figure 2.8).

(Figure 2.8)

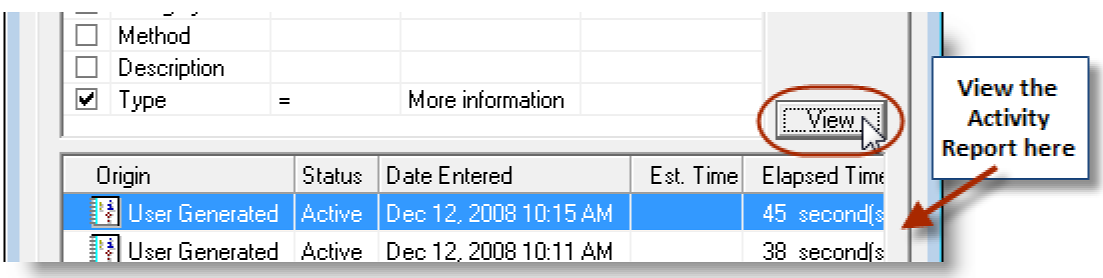


Click in the **Value** cell, and then click the **Browse** button to open the Activity Types window. Select the Activity Type, and then click **OK** (see Figure 2.9). Click the **View** button to view any Activities labelled with this particular Type (see Figure 2.10).

(Figure 2.9)

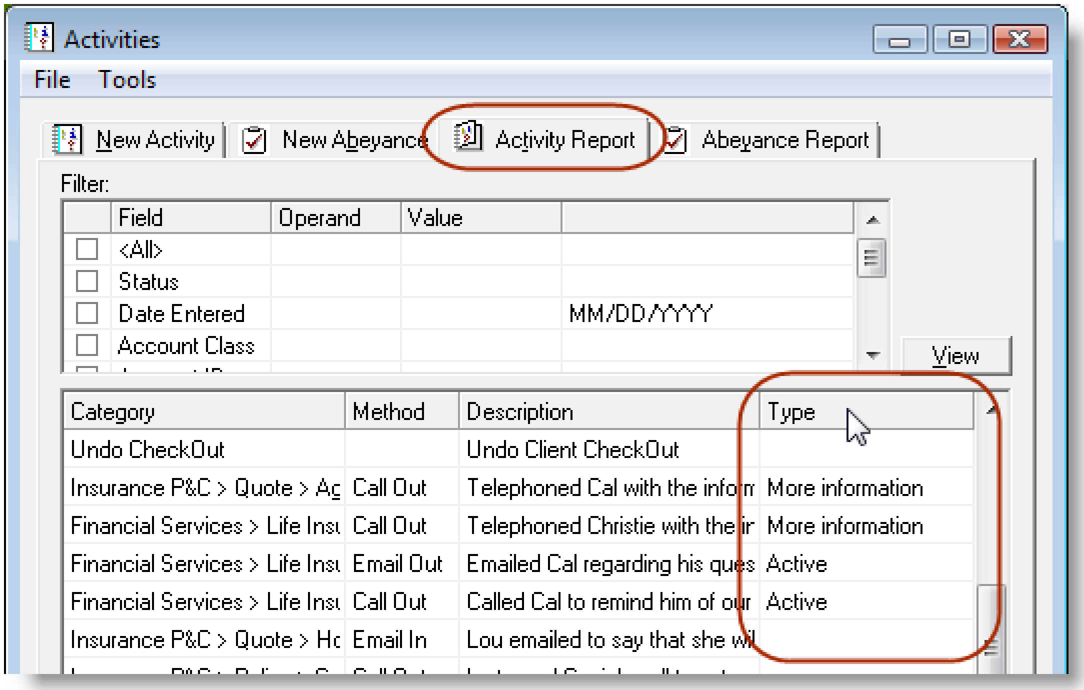


(Figure 2.10)



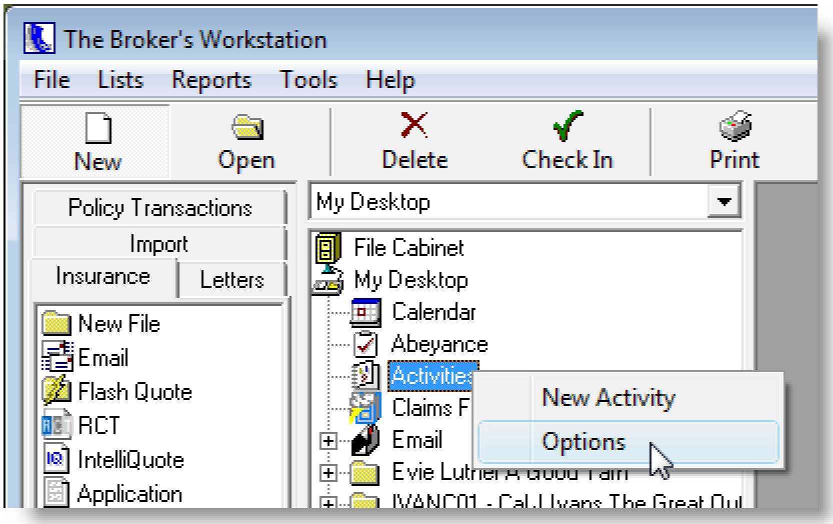
The Type of each Activity in any Activity Report can be viewed in the **Type** column in the Activity Report (see Figure 2.11).

(Figure 2.11)



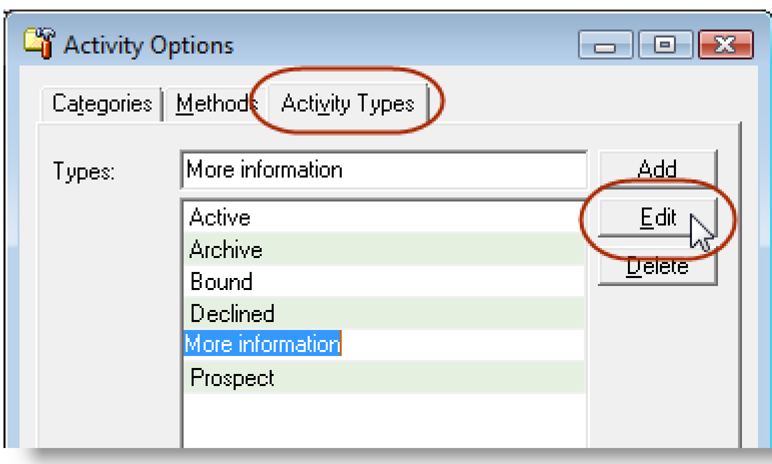
Note that an Activity Type can be edited or deleted at any time through the **Activity Options** window. To open the Activity Options window, right-click the **Activities icon** in the Desktop Tree, and then click **Options** (see Figure 2.12).

(Figure 2.12)



In the Activity Options window, click the **Activity Types** tab. Then, click the Type to be modified and click the **Edit** button. The Type name will be highlighted, and you need only enter the required text (see Figure 2.13). To permanently remove an Activity Type from the list, click the Type to be deleted, and then click the **Delete** button.

(Figure 2.13)



Please note that this feature is available only on the SQL database platform.

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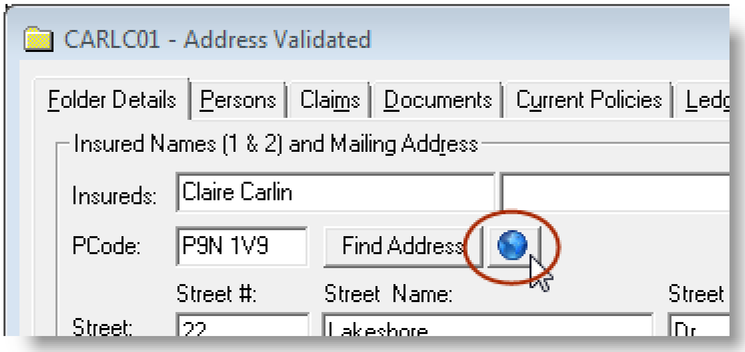
3. Use Google Maps in TBW

Our clients have requested the ability to check addresses within TBW using the Google Maps feature. We are pleased to announce a program enhancement that provides access to Google Maps within TBW.

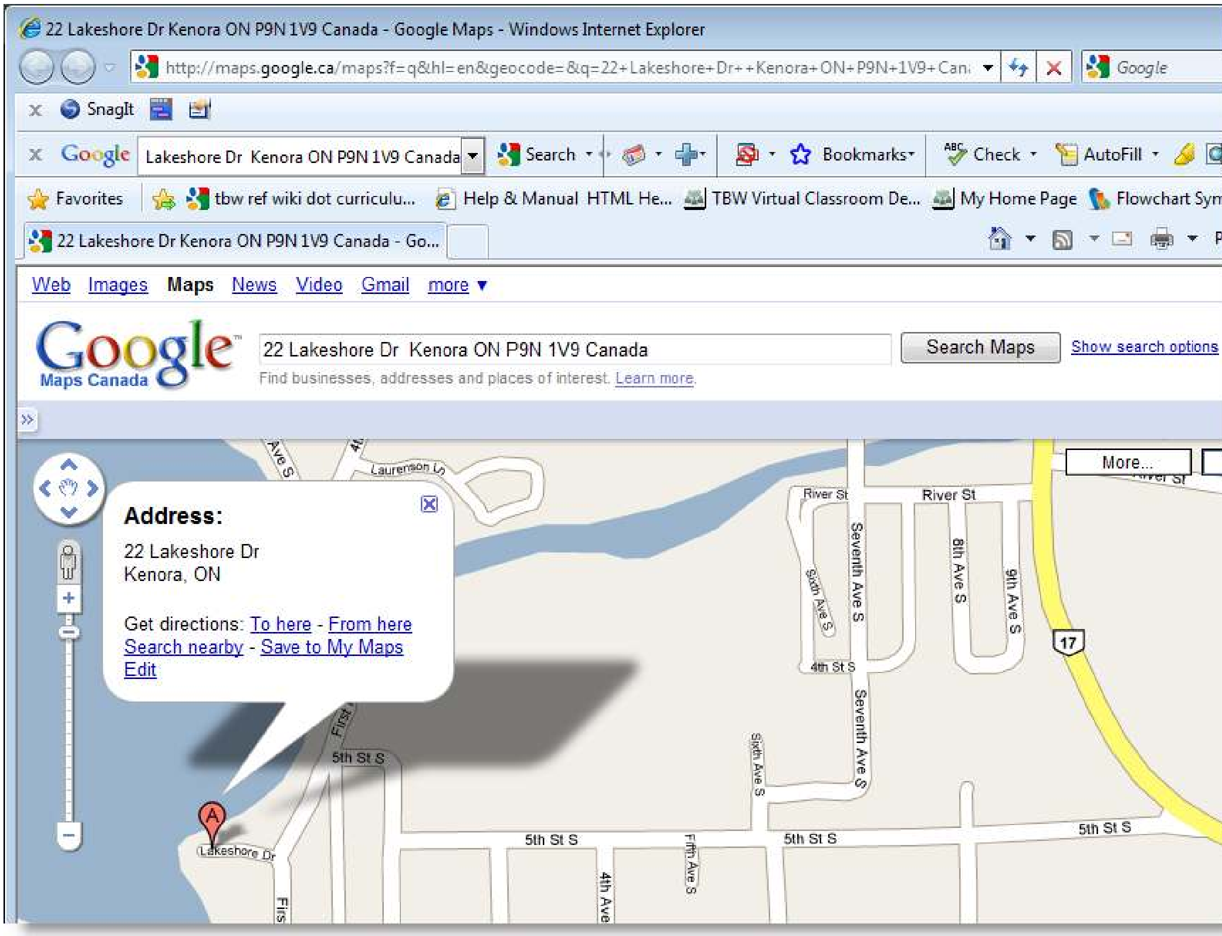
The new **Map button** (see Figure 3.1) that connects the TBW user with Google Maps is found in a variety of locations throughout The Broker's Workstation.

(Figure 3.1)



Simply click the Map button to open Internet Explorer in its own window and view the current address on the Google map (see Figure 3.2).

(Figure 3.2)



The new Map button can be found when working with the following in TBW:

- Client folders, Group folders, and List Item folders
- Personal Details address screens
- Any List Item with an address component
- Legal Locations for Coverage Items
- Mortgagees, Lessors, and Lienholders
- Claims
- RCT addresses
- All File Cabinet searches
- Word processing Recipient Lists
- Additional Named Insured and Legal Locations on Certificates of Insurance

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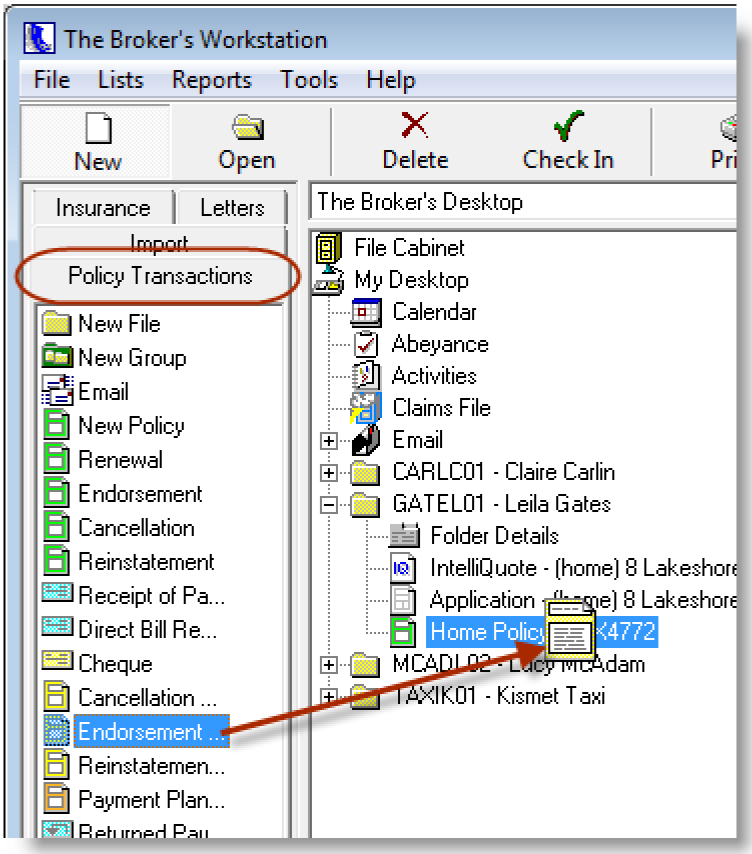
4. Minimizing an Unfinished Request Document

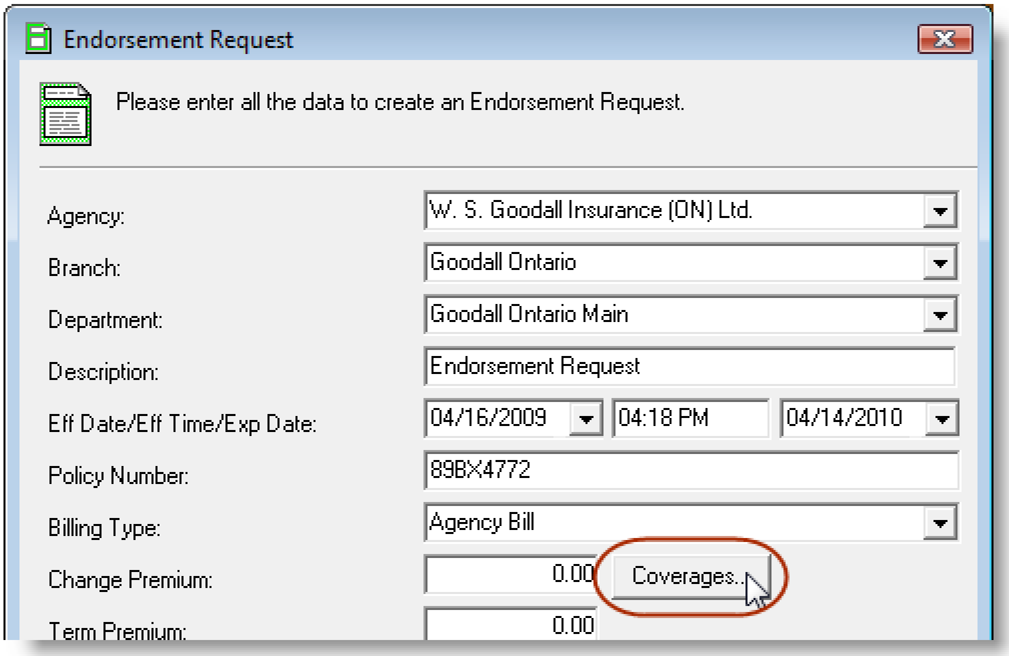
TBW users have requested the ability to pause while creating an Endorsement Request to attend to other tasks, without losing any information already entered in the request document or having to complete the entire document first. We are pleased to announce a new feature that allows the TBW user to minimize the Endorsement Request window while the request document is being created or modified. With this program enhancement, the TBW user can set aside the incomplete document to assist a client, complete a task in another client folder, etc., and then return to and complete the unfinished Endorsement Request at a later time.

To create an Endorsement Request, drag and drop the **Endorsement Request icon** from the **Policy Transactions Tray** onto the latest Policy document in the **Desktop Tree** (see Figure 4.1). Confirm Folder Details, enter the requested details in the **Endorsement Request** window, and then click the **Coverages** button (see Figure 4.2).

(Figure 4.1)

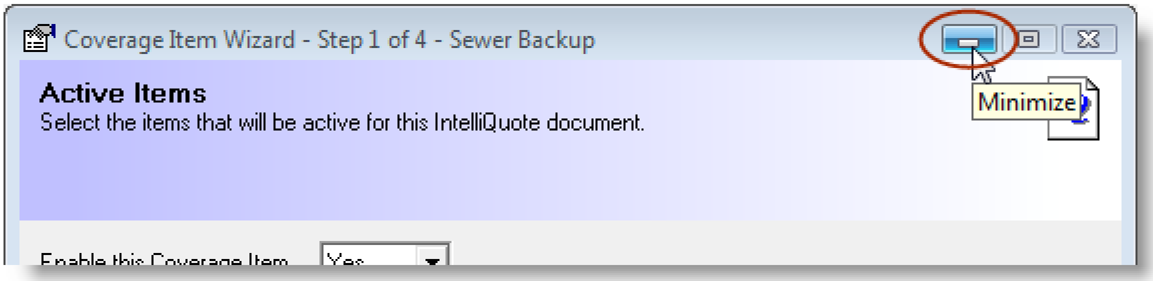


(Figure 4.2)



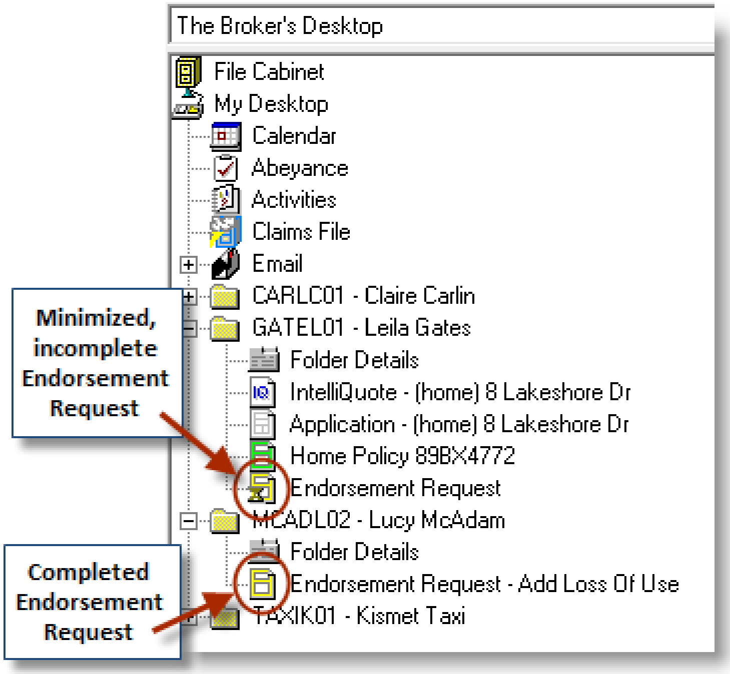
The **Minimize** button is available in the top right corner of the **IntelliQuote Details** window, the **Optional Coverages** window, and the **Coverage Item Wizard** (see Figure 4.3). Simply click the Minimize button to set the document aside, and all information already entered in the current window, as well as any data entered in any other window to this point, will be saved and stored.

(Figure 4.3)



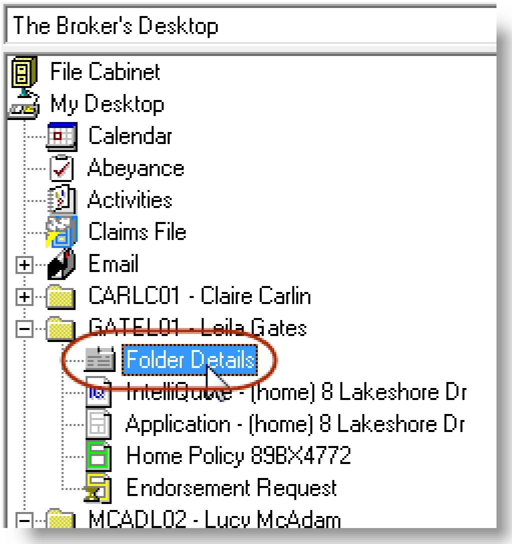
When you minimize an unfinished Endorsement Request, the document will appear in the **Desktop Tree**, marked by an icon that clearly distinguishes the incomplete document from request documents that have been completed (see Figure 4.4).

(Figure 4.4)

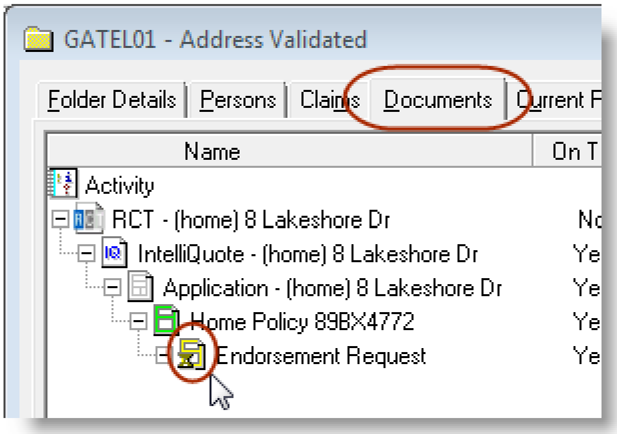


An incomplete Endorsement Request is also shown as an unfinished document in the client's Folder Details. Double-click the client's **Folder Details** in the **Desktop Tree** (see Figure 4.5), and then click the **Documents** tab in the **Folder Details** dialogue box. Any incomplete request document listed in a client folder will be clearly marked with an icon identifying it as an unfinished document (see Figure 4.6).

(Figure 4.5)



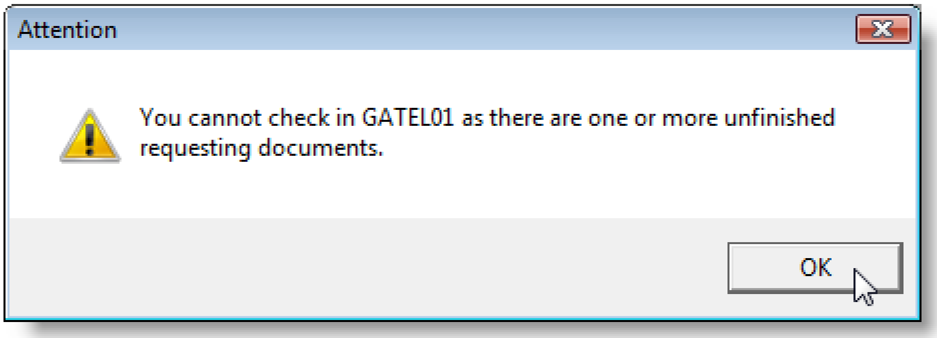
(Figure 4.6)



After minimizing a request document, the TBW user can assist a client, work with another client document or folder, exit TBW to complete another task, etc. However, when an unfinished Endorsement Request has been minimized, the user **cannot** do the following:

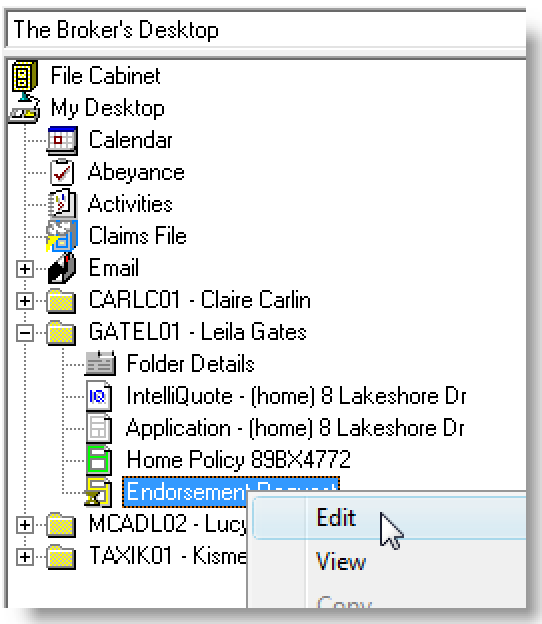
- Drag and drop another document onto the unfinished request document, *or*
- Manually check in the client folder.
  - An alert will appear if you attempt to check in the folder prior to completing the document (see Figure 4.7).

(Figure 4.7)

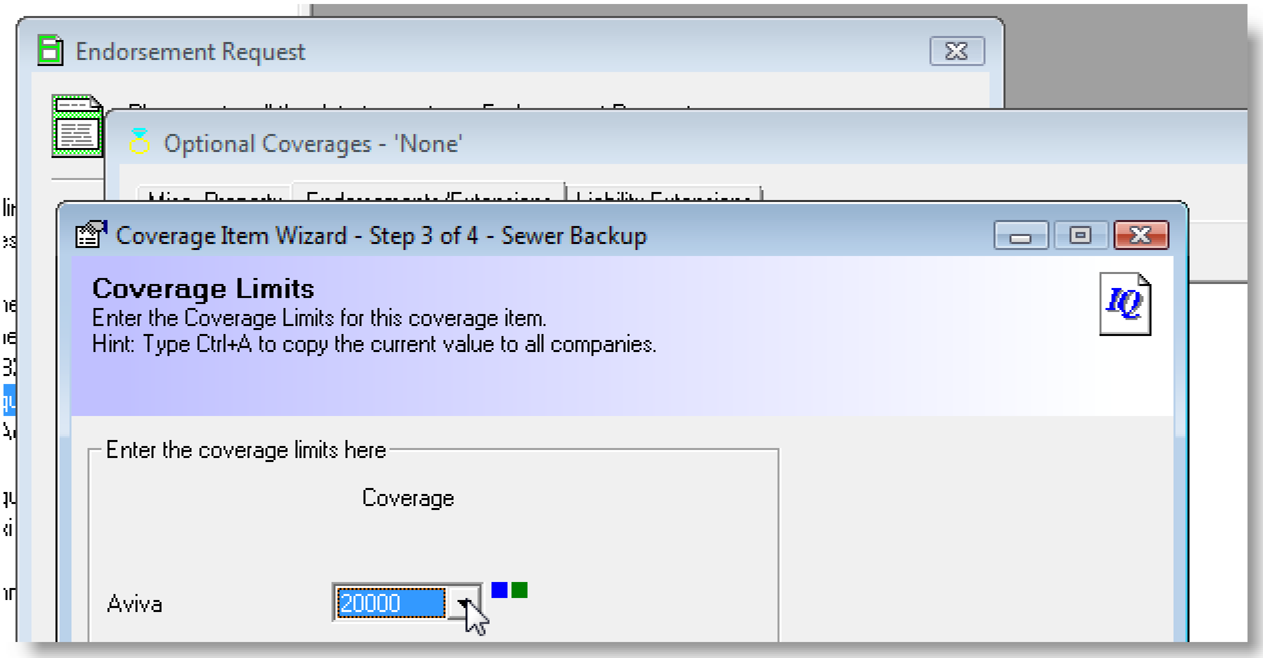


To finish an incomplete Endorsement Request, either double-click the document in the **Desktop Tree**, or right-click the document in the Desktop Tree and then click **Edit** in the right-click menu (see Figure 4.8). The document will open to the window in which the user was last working, and all details already entered will be visible and available to the user (see Figure 4.9).

(Figure 4.8)



(Figure 4.9)



The Minimize feature can also be used while editing an existing Endorsement Request. If you are modifying a request document, but must pause during the process to complete another task, use the Minimize feature to set the document aside for the time being. When an existing Endorsement Request opened for editing is minimized, it too will be marked in the Desktop Tree and on the Documents tab in the Folder Details dialogue box with the **Incomplete Endorsement Request** icon. Once modifications have been completed, the icon will be replaced with the standard icon.

While a new or existing Endorsement Request can be minimized as many times as needed, please remember that any document that has not been checked into the File Cabinet since modifications have been made is not a saved document.

Please note that this feature is available only on the SQL database platform.

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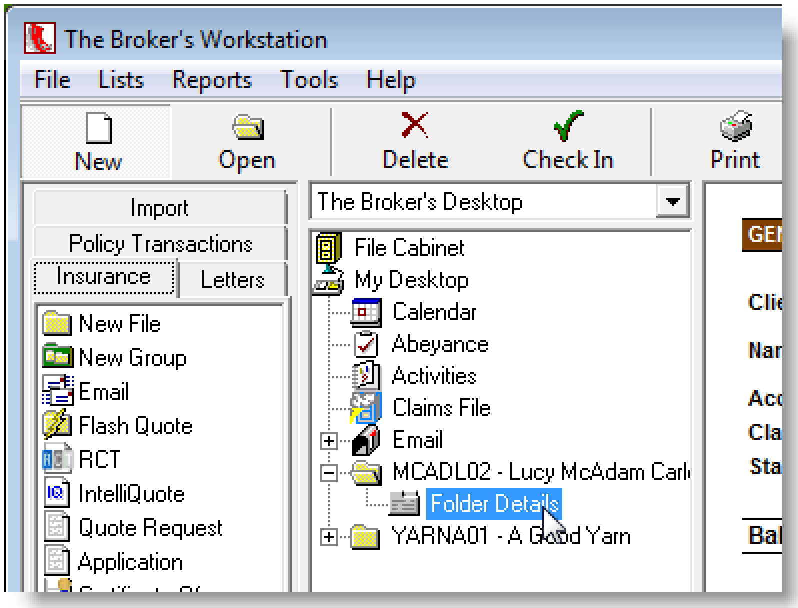
5. MVR and AutoPlus Lookup in Personal Details

We are pleased to announce that the Driver Details tab in the TBW client folder has been enhanced to include the ability to lookup and then persist a client's MVR and AutoPlus information.

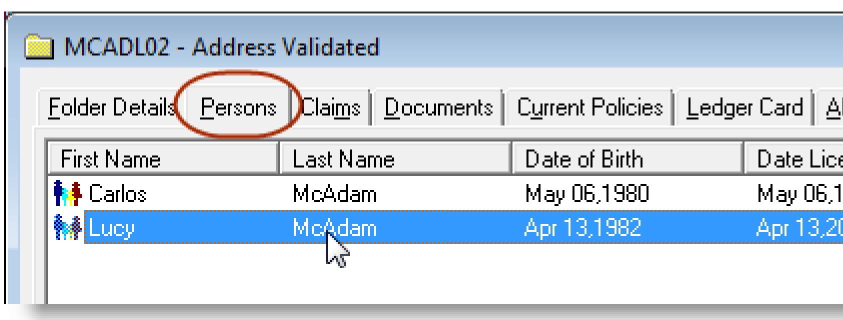
To view the Driver Details tab, double-click the client's **Folder Details** in the **Desktop Tree** (see Figure 5.1).

(Figure 5.1)



In the **Folder Details** window, click the **Persons** tab, and then double-click the target person (see Figure 5.2).

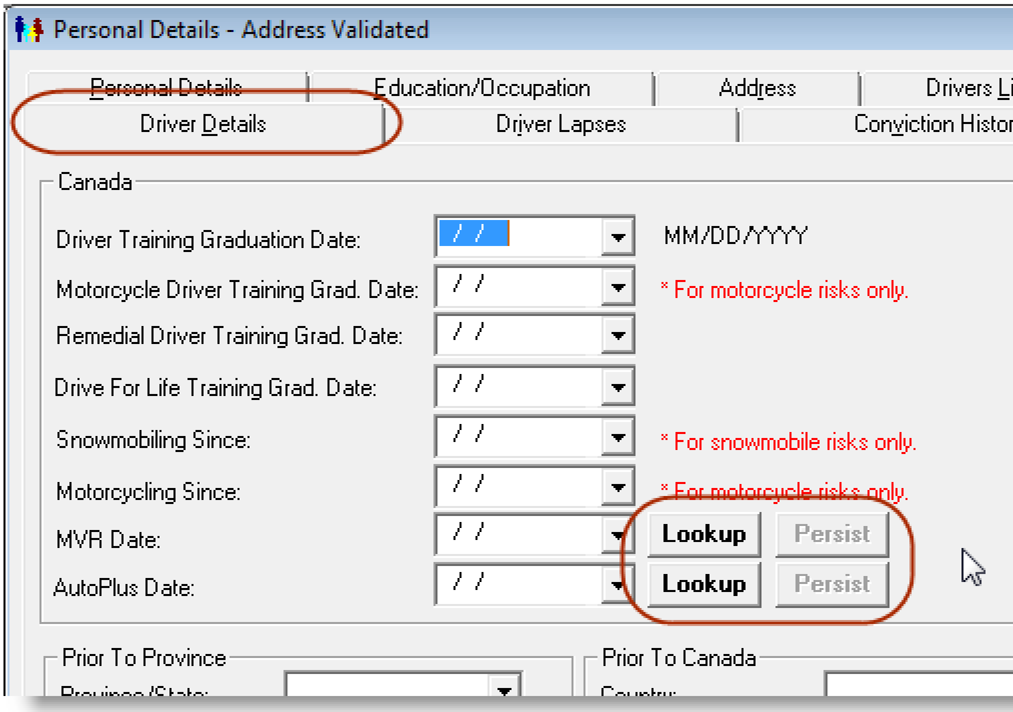
(Figure 5.2)



In the **Personal Details Wizard**, click the **Driver Details** tab and view the new **Lookup** and **Persist** buttons (see Figure 5.3).

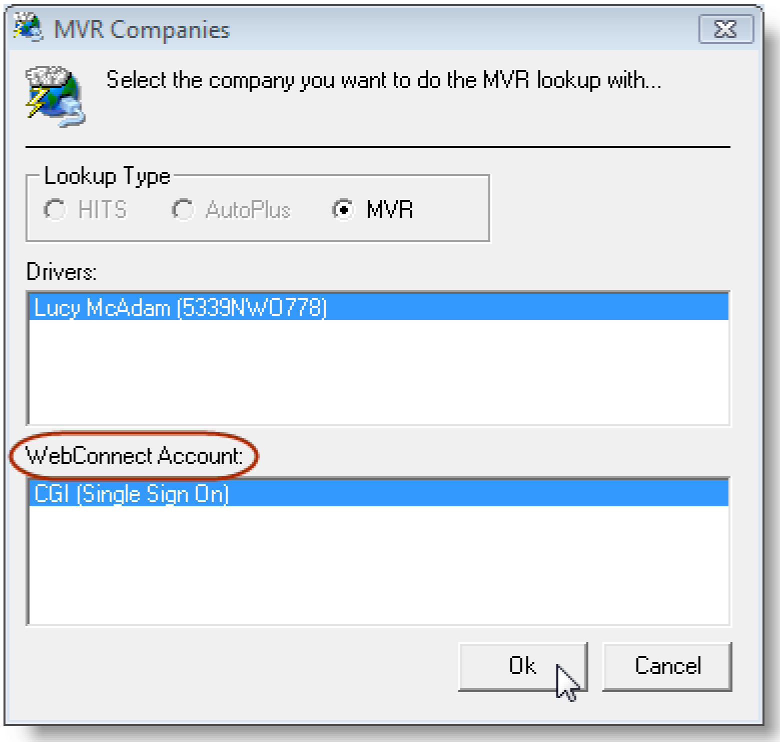
- Note that the Persist buttons will not be enabled until the Lookup process has been started.

(Figure 5.3)



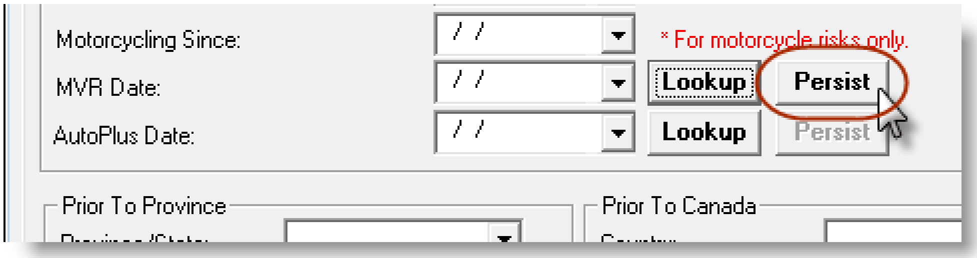
To look up MVR data for the client, click the **Lookup button** beside **MVR Date**. The **MVR Companies** window will open. Select the applicable **WebConnect Account**, and then click **OK** to access MVR information online (see Figure 5.4).

(Figure 5.4)



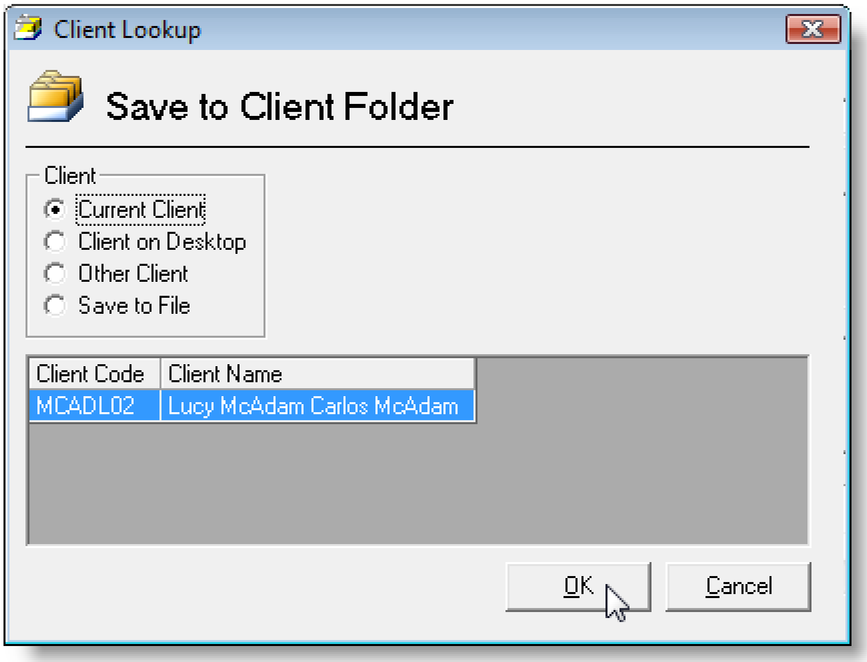
Once the MVR Lookup has been initiated, the **Persist** button on the Driver Details tab will be enabled. At any time during the lookup process, click the Persist button to capture a static, permanent view of the current window and its MVR information (see Figure 5.5).

(Figure 5.5)



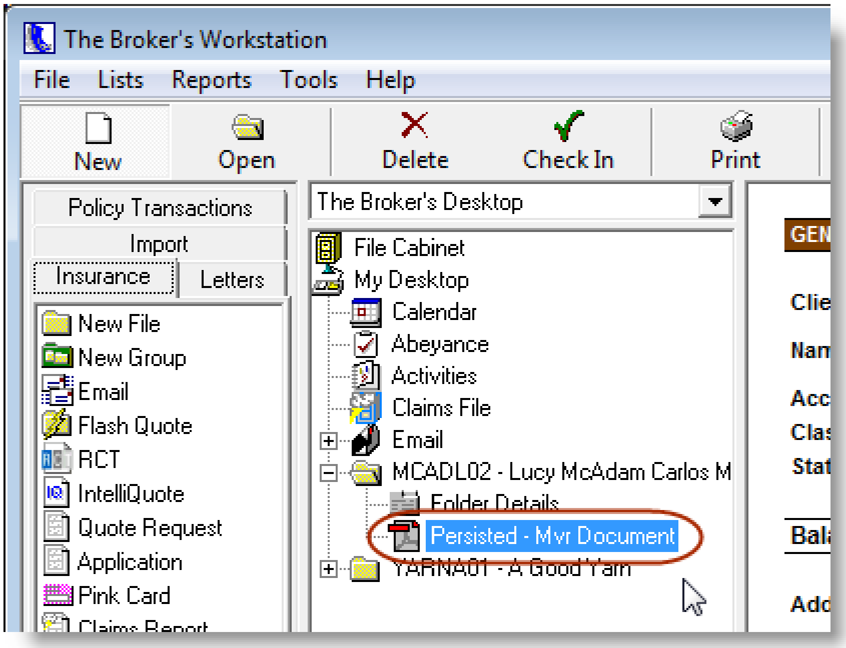
Then, in the **Client Lookup** window that opens, select the location to save the new document, and click **OK** (see Figure 5.6).

(Figure 5.6)



Next, enter a name for the persisted document in the **Get Doc Name** window, and click **OK**. If the document was saved to a client folder, it will appear in the Desktop Tree (see Figure 5.7). Double-click the document to open and view it in the Document Window.

(Figure 5.7)



Repeat these steps to look up and persist AutoPlus details for the client.

Note that these Lookup and Persist buttons are also available when you are creating a new client folder or adding an additional person to an existing client folder.

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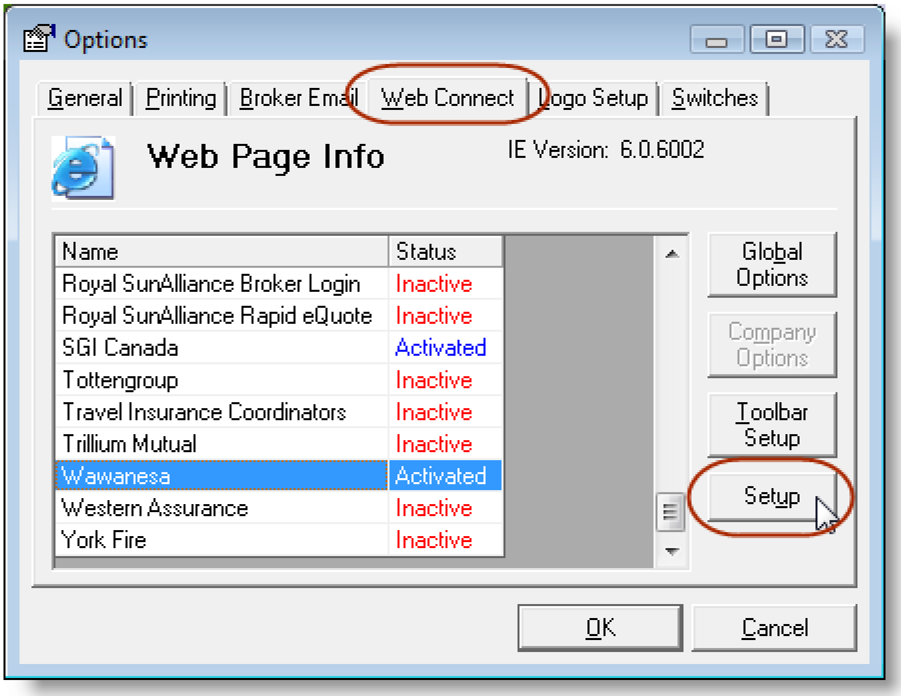
6. New Wawanesa Broker Portal

Beginning June 2, 2009, the new Wawanesa Broker Portal replaces the Wawanesa Broker website. This new Broker Portal has all of the functionality of the previous website, with additional enhancements, including the following:

- **Improved Security Features** – Individual User IDs and Passwords will be implemented for all Broker Portal users.
- **Additional Functionality** – The Broker Portal will now provide access to policy documents through Policy Document Inquiry.
- **New Office Administrator Role** – The new Broker Office Administrator will be your primary office contact with Wawanesa and will manage user access to and provide reference materials for the new Broker Portal.

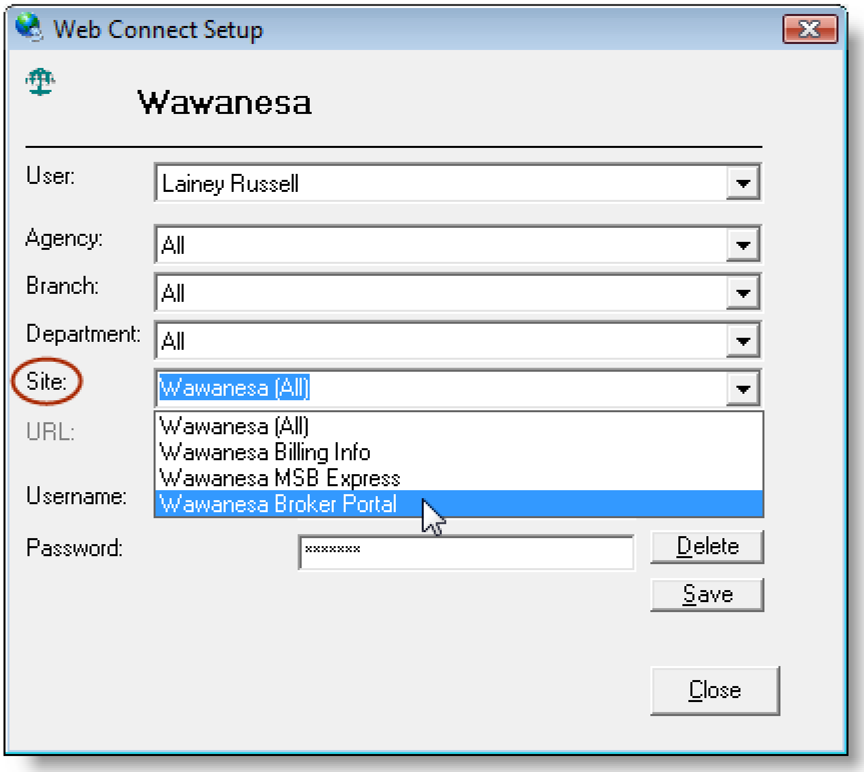
Once you have a Username and Password for the new Wawanesa Broker Portal, the Portal must be activated for WebConnect use in TBW. Click **Tools**, **Options**, and then click the **WebConnect tab** in the **Options** window. Select **Wawanesa**, and click the **Setup button** (see Figure 6.1).

(Figure 6.1)



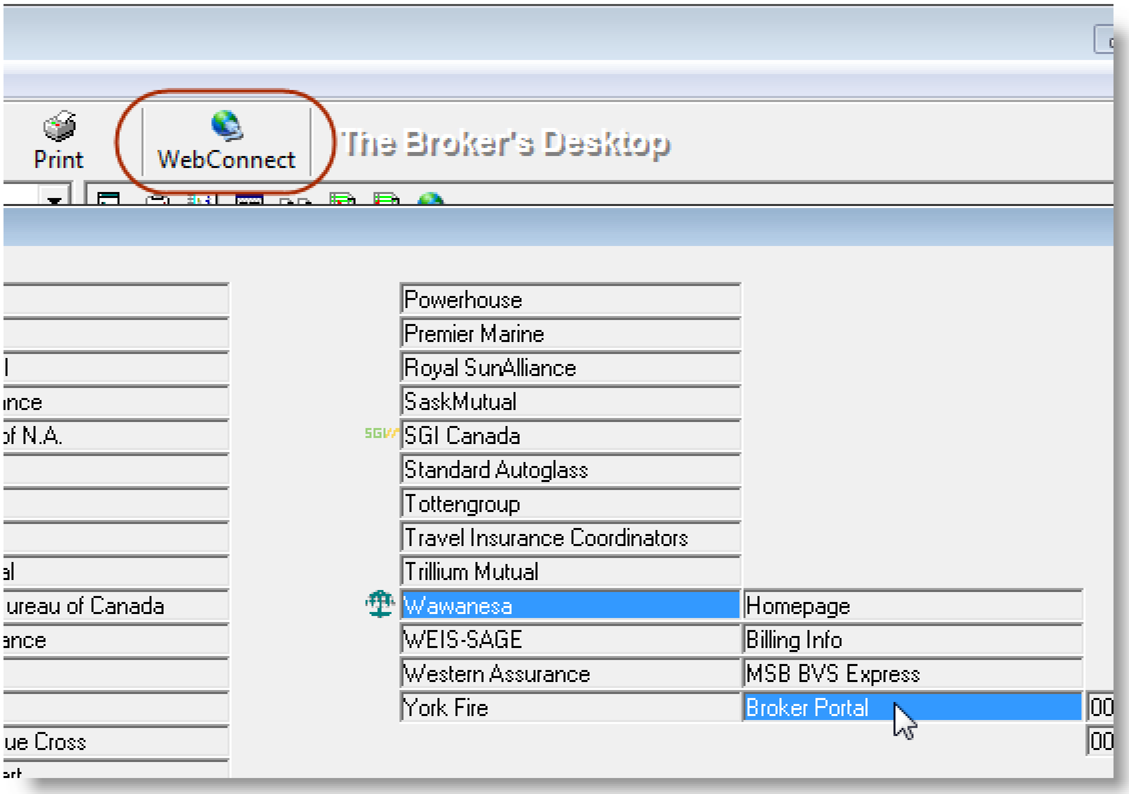
In the **WebConnect Setup window**, enter the requested filters, and then click the **Site** drop-down menu and select **Wawanesa Broker Portal** (see Figure 6.2). Enter your Broker Portal **Username** and **Password**, click **Save**, and then click **Close**.

(Figure 6.2)



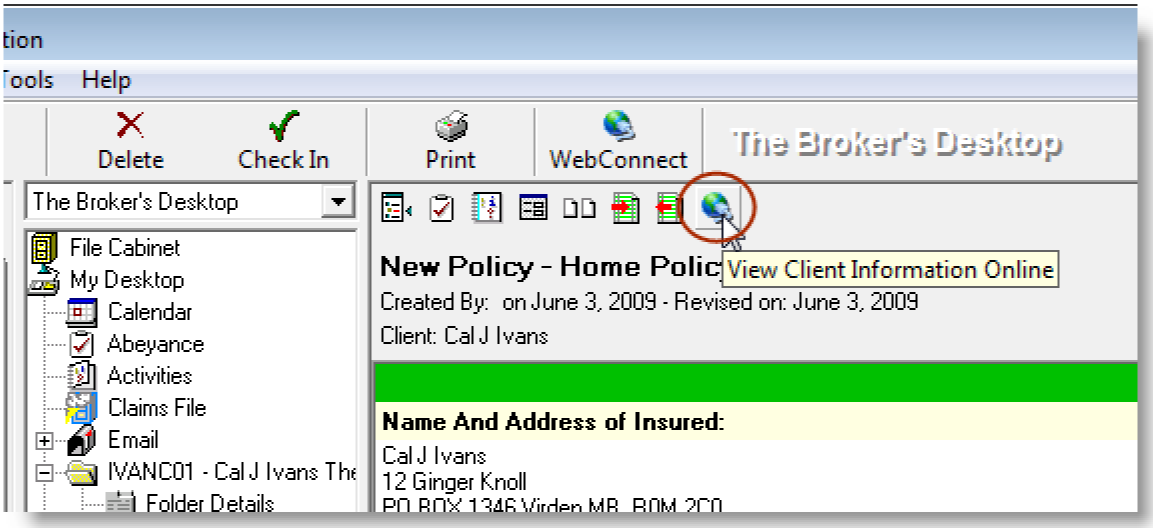
After setup is complete, Wawanesa's new Broker Portal will be accessible through WebConnect. Simply click the **WebConnect button** on the TBW toolbar to open the WebConnect toolbar and access the Broker Portal (see Figure 6.3).

(Figure 6.3)

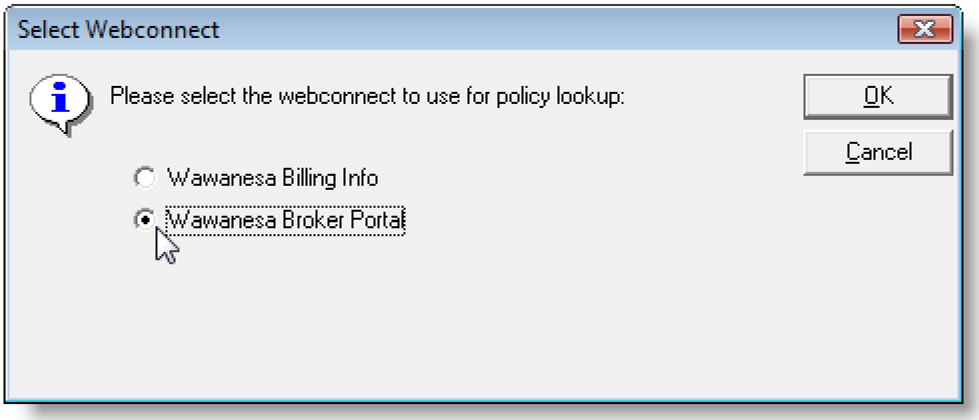


The Broker Portal can also be accessed directly from a Policy document. When the document is open in the Document Window in TBW, click the **View Client Information Online** button (see Figure 6.4). Then, in the **Select WebConnect** window, choose which option to use for information lookup (see Figure 6.5), and click **OK** to open the website in Internet Explorer.

(Figure 6.4)

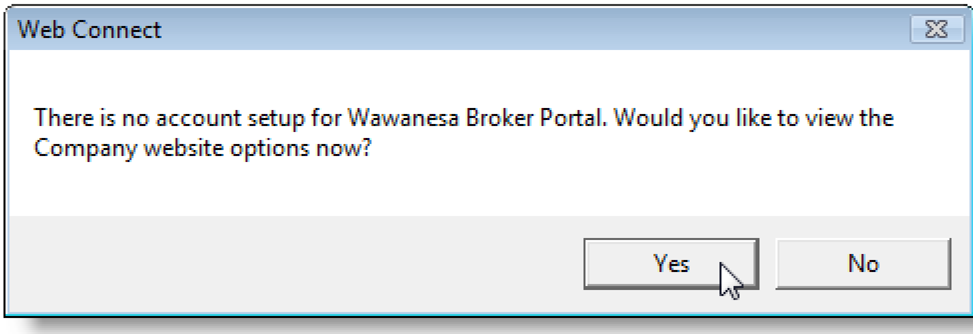


(Figure 6.5)



If WebConnect setup has not been completed for the selected option, the following prompt will appear (see Figure 6.6). Click **Yes** and click the **WebConnect tab** in the **Options** window to complete the setup.

(Figure 6.6)



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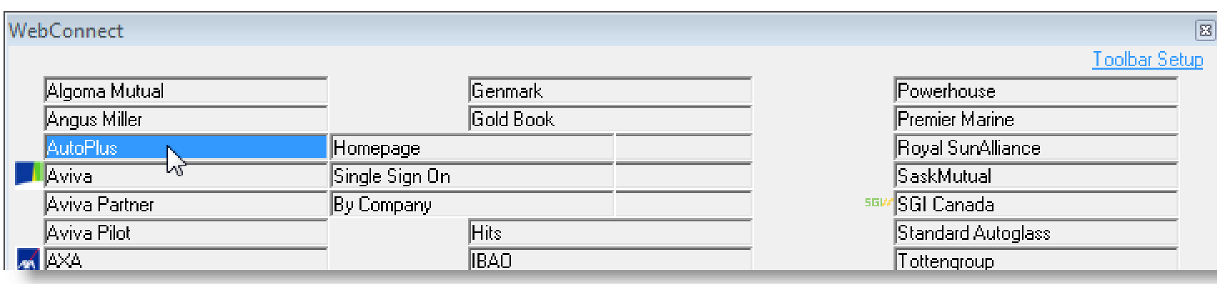
7. Expanded WebConnect Company List

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 and services available through WebConnect opens in the **WebConnect window** (see Figure 7.1).

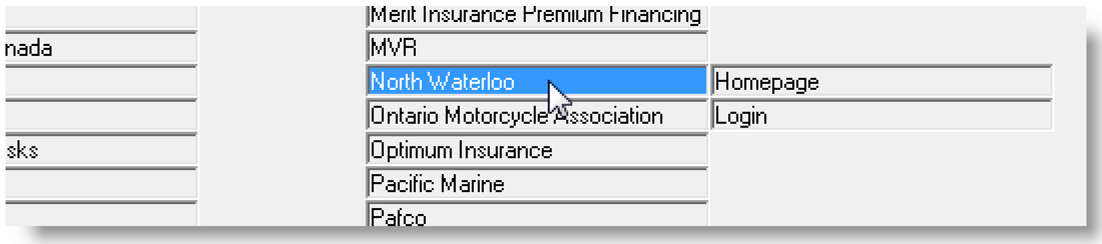
(Figure 7.1)



This list has been expanded to include the following company:

- **North Waterloo Farmers Mutual Insurance Company:** The North Waterloo link provides the TBW user with convenient access to the Homepage and Login page for this Ontario-based mutual insurance company (see Figure 7.2).

(Figure 7.2)



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.