

17 November 2010

To: Users of The Broker's Workstation and/or The Underwriter's Workstation

Dear Valued Client:

**Re: The Broker's Workstation and The Underwriter'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)** and **the Underwriter's Workstation (TUW)**:

Contents

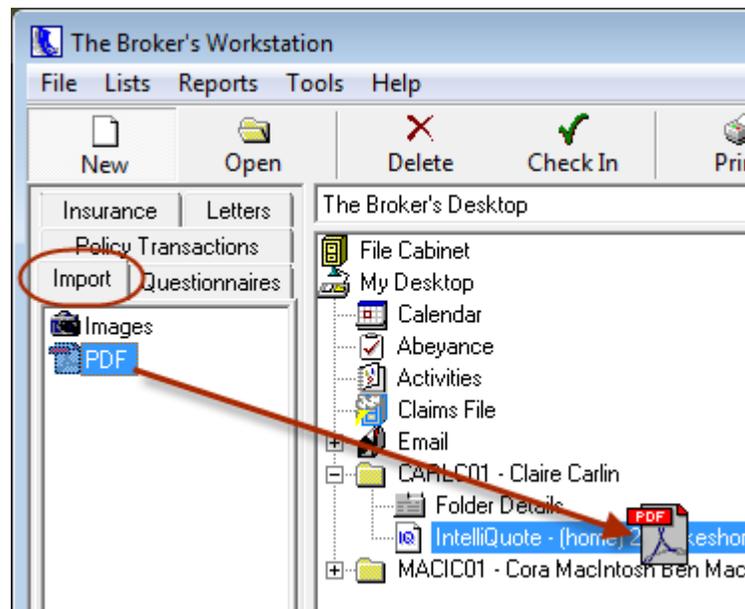
1. [Attach Imported Images and PDF Documents to Any Document Type](#) – When an image or PDF is imported using the Import tab, the imported file can be attached to any document type in the Desktop Tree.
2. [Enhancements to Document Sorting in the Documents List in Folder Details](#) – The “All Documents – Grouped” and individual filters on the Folder Details Documents tab have been enhanced.
3. [New Auto IntelliQuote Outline View](#) – This brief overview of the automobile IQ includes basic vehicle, driver, and rating details, and can be printed for the client or persisted and saved to the client folder.
4. [Enhanced Payment Slip Document for Wawanesa New Business Applications](#) – The Payment Slip document available for new business Applications for Wawanesa has been updated.
5. [Broker Training Sessions for TBW](#) – All TBW users, whether new or experienced, are welcome to participate in these live, interactive, hands-on training sessions offered each month over the Internet by our professional trainer.

1. Attach Imported Images and PDFs to Any Document Type

Clients have requested the ability to attach an imported image or PDF to any document type in the Desktop Tree. We are pleased to announce an enhancement to the Import feature that allows imported documents to be attached to any document type, including IntelliQuotes, in the Desktop Tree.

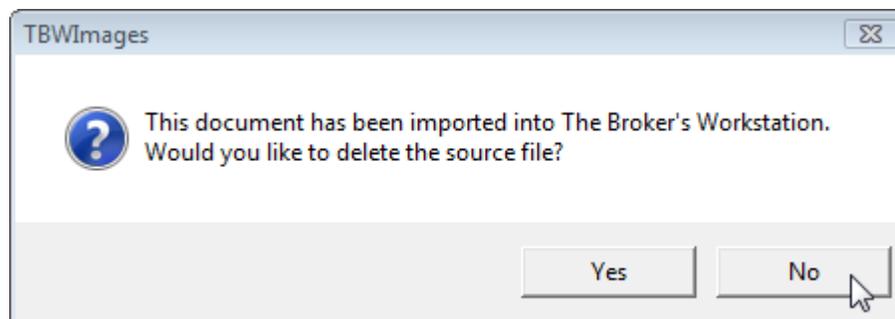
To attach an image or PDF to a client document, drag and drop the icon from the **Import Tray** onto the client document in the **Desktop Tree** (see Figure 1.1).

(Figure 1.1)



In the **Open** dialog, find and double-click the file to be imported. Enter a descriptive name for the file in the **Get Image Name** dialog, and click **OK**. Then, in the TBWImages dialog, click **No** to keep the original file, or click **Yes** to delete the original file (see Figure 1.2).

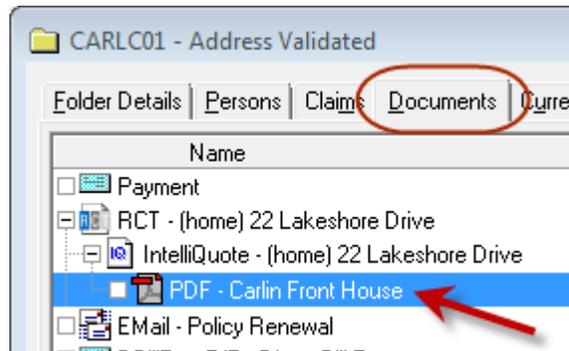
(Figure 1.2)



The imported file will appear in the Desktop Tree and open in the Document window, and will also be listed on the Documents tab in the client's Folder Details (see Figure 1.3).

- Note that the imported document will be a child document on the Documents tab, as it was attached to another document.

(Figure 1.3)



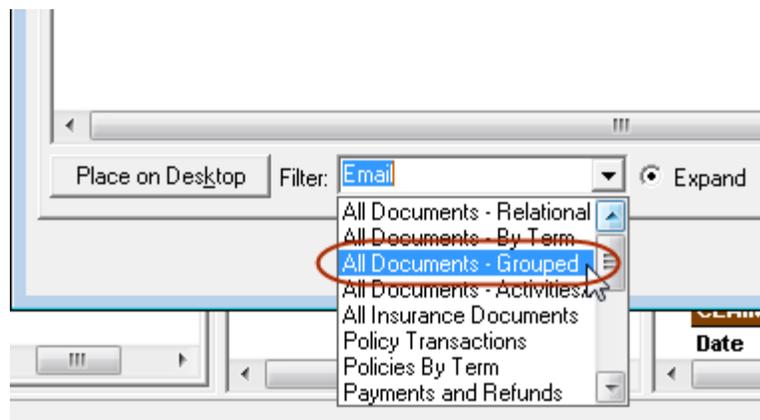
Please note that this feature is available only on the SQL database platform.

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2. Enhancements to Document Sorting in the Documents List in Folder Details

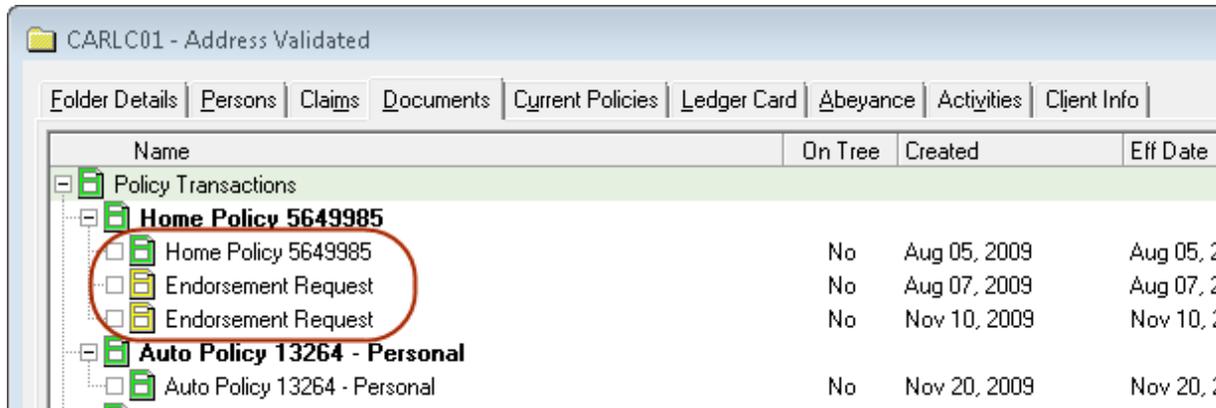
We are pleased to announce a number of enhancements to the document filter and sorting feature on the Documents tab in Folder Details. To view these enhancements, double-click **Folder Details** in the **Desktop Tree**. On the **Documents** tab in the Folder Details window, select the **All Documents – Grouped** filter (see Figure 2.1).

(Figure 2.1)



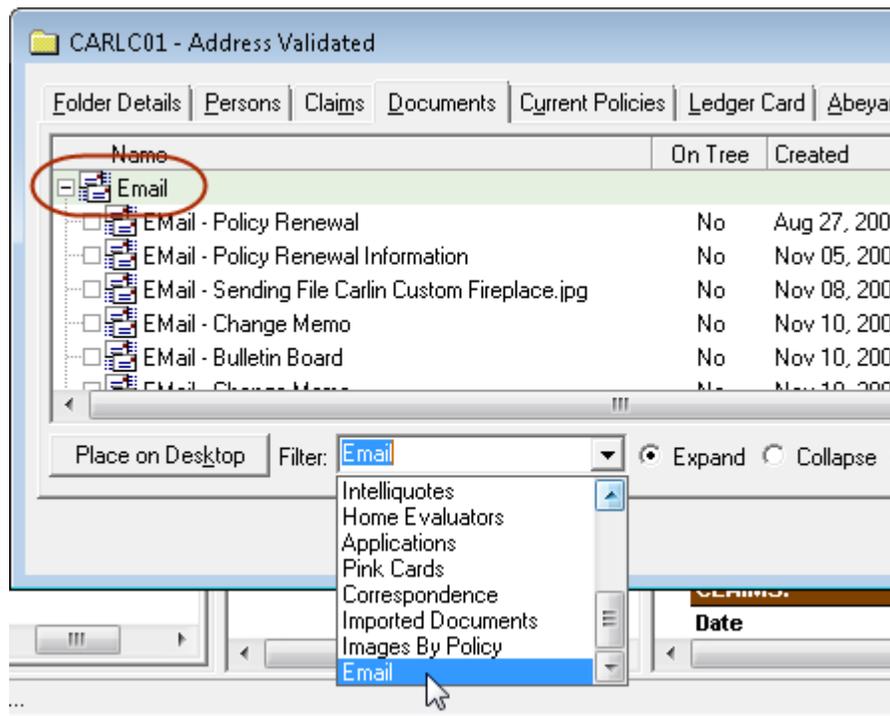
Each section in the Documents list will be sorted chronologically. As well, each Policy in the Policy Transactions section will display as a single-indentation level, with items sorted chronologically (see Figure 2.2).

(Figure 2.2)



In addition, single-group filters (such as Email, Claims, Correspondence, etc.) will now display a Group Header (see Figure 2.3).

(Figure 2.3)



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

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3. New Auto IntelliQuote Outline View (TBW)

In response to requests from our clients for a concise summary of the Auto IntelliQuote, we are pleased to announce that the Auto IQ has been enhanced with the new **Outline View**. This brief overview of the IQ includes basic vehicle and rating details, as well as principal and occasional driver information, and can be printed for the client or persisted and saved to the client folder.

Once the Auto IQ has been created, click the **Outline View** tab to view vehicle, driver, and rating details for the selected company (see Figure 3.1). Scroll down to view any additional vehicle(s).

(Figure 3.1)

Outline View for [Dominion](#)
Calculation Date: [03/19/2010](#)
Rating Definition: [None](#)

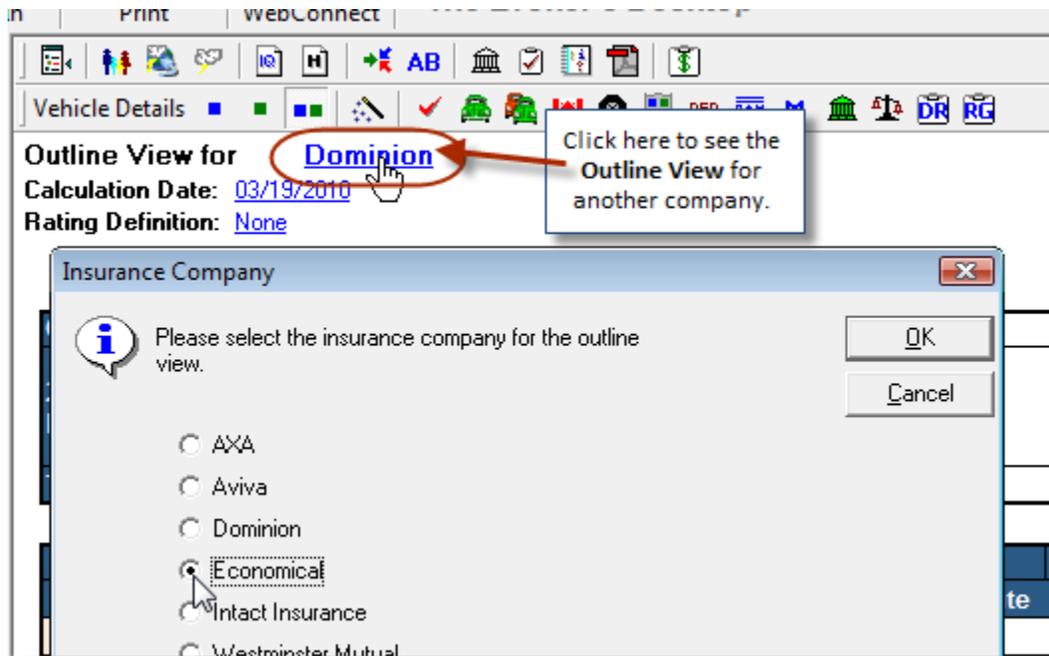
Test IQ	Outline View For:			
2 Lessard PI	Dominion			
Total Premium: \$4,340	Premium w/Tax: \$4,340			

Vehicle #1: 2009 MINI COOPER CONVERTIBLE		VICC: 1289		
Type: Private Passenger Vehicle		Vehicle Use: Pleasure		
Rating Territory:		Territory 03 (TOJ 0Y6)		
Drivers		Principal	Occ 1	Occ 2
		Sally S.	Ken S.	
Class/TPL/Coll		01 / 06 / 06		
TPL	\$1,000,000	\$306		\$306
Bodily Injury				
Property Damage				
Accident Benefits		\$39		\$39
Uninsured Automobile				
Direct Compensation				
Collision	\$500	\$232		\$232
Comprehensive	\$250	\$317		\$317
Specified Perils				
All Perils				
Endorsements/Extensions				
End # 13D - Limited				

Coverage Report / Summary Report(s) / **Outline View(s)** / Alerts / Comparison Report

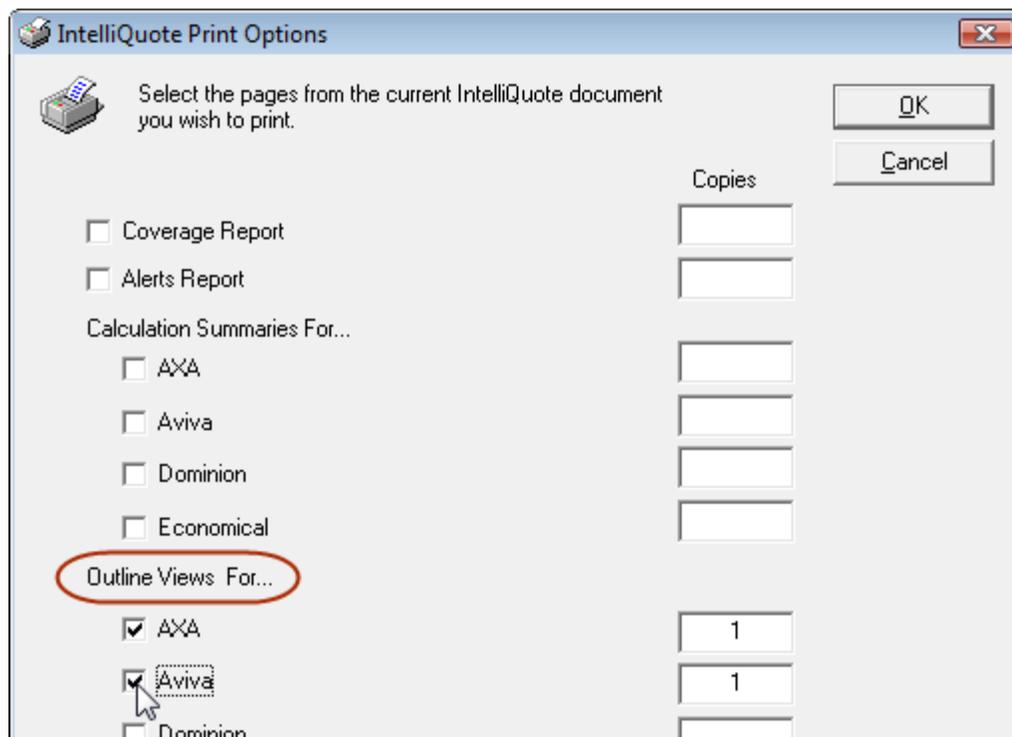
To see the Outline View for another company, click the company name at the top of the document and select another company in the **Insurance Company** window (see Figure 3.2).

(Figure 3.2)



To print the IQ Outline View for one or more companies, click the **Print** button on the TBW toolbar. In the **IntelliQuote Print Options** window, select the company/companies and enter the number of copies to print in the **Outline Views For...** section (see Figure 3.3). Click **OK**.

(Figure 3.3)



To save the IQ [including the Coverage Report, Summary Report(s), Outline View(s), and Alerts] in PDF format to the client folder, click the **PDF Snapshot** button  on the IQ toolbar. Enter a descriptive name for the document in the **Get Doc Name** dialog, and click **OK**. Double-click the PDF document in the **Desktop Tree** to open and view it in the **Document Window**.

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

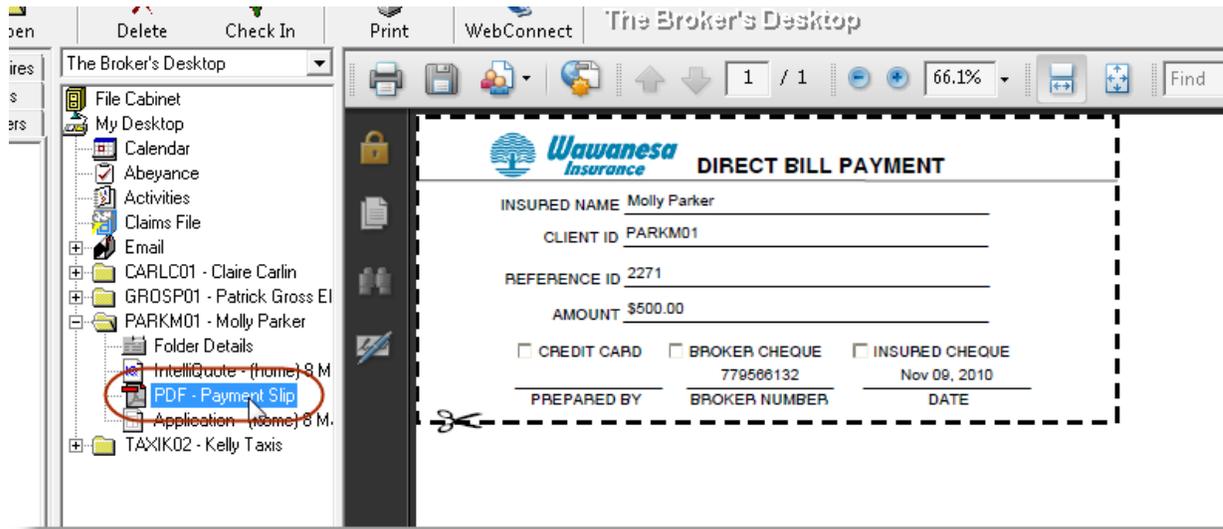
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4. Enhanced Payment Slip Document for Wawanesa New Business Applications

Recently, the new Payment Slip document became available for Wawanesa new business Applications with a Direct Bill or MAC billing method. This Payment Slip document has been updated with a number of new features.

To create a Payment Slip document, first create an Application for Wawanesa with either a Direct Bill or MAC billing method. Once the Application has been created, it will open in the Document Window, and the Payment Slip will appear in PDF format in the **Desktop Tree**. Double-click the Payment Slip to open and view it in the **Document Window** (see Figure 4.1).

(Figure 4.1)



Note the following modifications to the Payment Slip:

- A separate **Client ID** field, which is automatically pre-populated, has been added to the document.
- The **Title** of the Payment Slip is “Direct Bill Payment,” regardless of whether the billing method is Direct Bill or MAC.
- The **Payment Type** checkboxes and **Prepared by** field are left blank so the broker can enter applicable information after the Payment Slip has been printed.

To print a copy of the Payment Slip, click the Print  button on the TBW toolbar when the Payment Slip is in the Document Window.

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

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5. Broker Training Sessions for TBW

We are pleased to announce that online interactive training for The Broker’s Workstation is now available to our clients.

These live, interactive, hands-on training sessions are offered each month over the Internet by our professional trainer, Brian Hitchlock. Current training modules include the following:

- **Get Started with The Broker’s Workstation:** Whether you are a first-time user of TBW, or an experienced user wanting a fresh look at the program, this two-hour module will prepare you to use TBW to complete your daily tasks with confidence. *Please note that this overview session is a prerequisite for subsequent training modules.*

- **Get Working with Personal Lines Property Insurance using TBW:** Targeted at both new and experienced users of The Broker's Workstation, this two-hour training module will show you how to use the program effectively and efficiently for personal lines habitational insurance.
- **Get Working with Personal Lines Auto Insurance using TBW:** Customized for our clients in provinces with private auto, this class will lead you through rating and writing auto insurance with The Broker's Workstation. Whether you are a brand-new user or are already familiar with TBW, join us for this two-hour session to see how the program can help you successfully and productively manage the auto insurance process.
- **Accounting Administration in The Broker's Workstation:** Designed specifically for those who are responsible for the administration of accounting in the broker's office, this class will show you how to configure, administer, and manage the accounting component of The Broker's Workstation.
- **Get Working with Accounting on The Broker's Desktop:** If you work with billings, reversals and adjustments, and receipts in your brokerage, this two-hour training module will prepare you to complete these tasks with ease using The Broker's Workstation. You will also expand your skills in working with TBW's Cash Drawer system.
- **Get Working with Accounting on The Accountant's Desktop:** Also intended for those who complete accounting tasks in the brokerage, this module will focus exclusively on client accounts receivables, insurer and producer payables, bank reconciliation, and direct bill reconciliation. Whether you are a new or experienced TBW user, plan to join us for this two-hour session to hone these specific skills.

All TBW users, whether new or experienced, are welcome to participate in these training sessions. Training participants require only a telephone and a computer with a high-speed Internet connection.

Future plans for our Broker training include online self-serve training modules accessible 24 hours per day, 7 days a week, available on an annual-fee basis.

Our trainer, Brian Hitchlock, is also available for customizable onsite training, based on your individual brokerage needs and requirements.

To register yourself and/or other TBW users for an upcoming training session, or with any questions you may have regarding our broker training, please contact us at training@cssionline.com (email) or 1-888-291-3588 (toll-free telephone). You can also visit our website (www.cssionline.com/training.htm) to view a schedule of upcoming classes or to register for training.

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Please share this information with the appropriate TBW and TUW 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 and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.

