



20 July 2010

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. [View Activities and Abeyances on the Client Folder Documents Tab](#) – A client's Activities and Abeyances can now be viewed on the Documents tab in the client's folder.
2. [Customizable Activity View in Client Folder Details](#) – The TBW user can select which columns to view on the Activities tab in the client's Folder Details.
3. [Customizable Abeyance View in Client Folder Details and the Abeyance Window](#) – Use the Columns button to select which columns to view and print on the Abeyance tab in Folder Details and also in the Abeyance window.
4. [Additional Dwelling Details in Persisted IntelliQuote](#) – Additional information, including data regarding dwellings and miscellaneous property, is now available in persisted habitational IntelliQuotes.

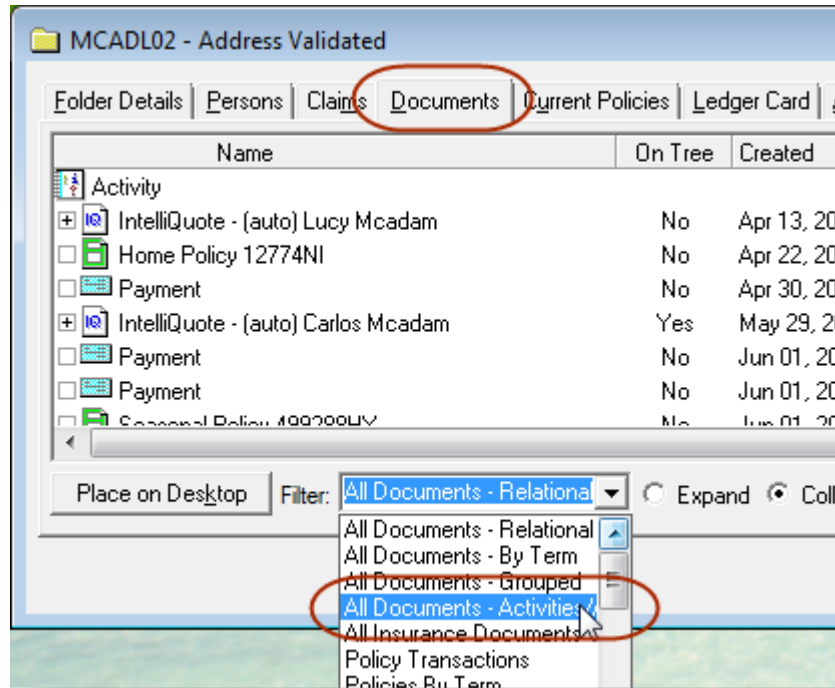
5. [Enhanced Habitational Application](#) – Applications created for property IntelliQuotes dated on or after August 1, 2010, have been enhanced to include additional details.
6. [Payment Slip Document for Wawanesa New Business Applications](#) – A Payment Slip document will be created for new business Applications for Wawanesa using a Direct Bill or MAC billing method.
7. [Access IFS Financial Services through TBW's WebConnect](#) – Use WebConnect to access IFS's online Broker System for finance quoting, contract generation, and account information lookup directly from the TBW interface.
8. [Manage Problem Policies in CSIO Download](#) – Following CSIO policy download, any corrupt or orphaned policy will be listed in the log file, along with instructions as to how to proceed with the policy.
9. [New Processed CSIO / I-Biz Report](#) – This new report provides TBW users with information necessary to track and transact a processed transaction prior to receiving the paper copy of the policy.
10. [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. View Activities and Abeyances on the Documents Tab

We are pleased to announce that a client's Activities and Abeyances can now be viewed in and accessed from the Documents list in the Client Folder.

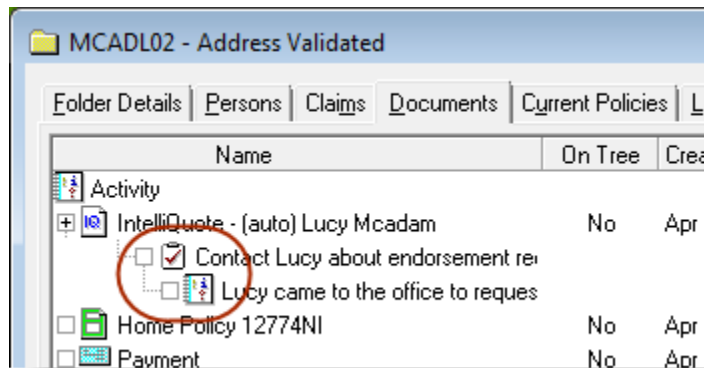
To view a client's Activities and Abeyances on the Documents tab, double-click the client's **Folder Details** in the **Desktop Tree**. In the Folder Details window, click the **Documents** tab. Select **All Documents – Activities/Abeyances** from the **Filter** drop-down menu (see Figure 1.1).

(Figure 1.1)



The Documents list will be organized in a relational manner and will include the client’s Activities and Abeyances, which are labelled with their standard icons (see Figure 1.2). Double-click an Activity or Abeyance to open the item in its own window to view, modify, or print.

(Figure 1.2)



Please note the following when working with Activities and Abeyances in the Documents list:

- All Abeyances (regardless of date, status, or producer) are displayed.
- System-generated Activities are not displayed.

- Any Activities and Abeyances that have not been assigned to specific documents will appear in the root level of the folder.

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

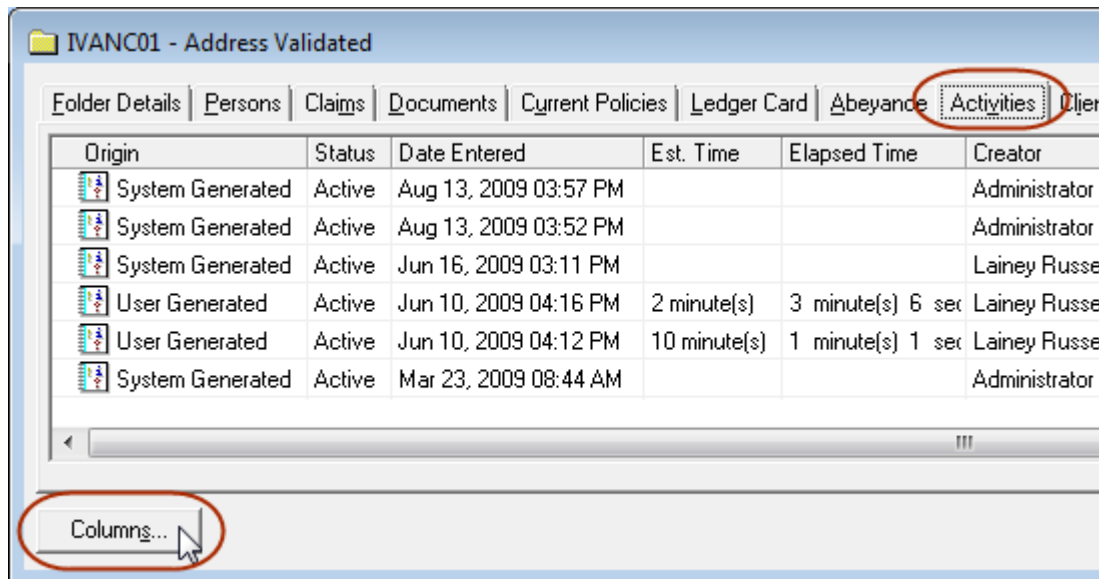
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2. Customizable Activities View in Folder Details

We are pleased to announce an enhancement to the Activities tab in the client's Folder Details that allows the user to select which informational columns to view.

To customize the view of Activities listed on the Activities tab, click the **Columns** button (see Figure 2.1).

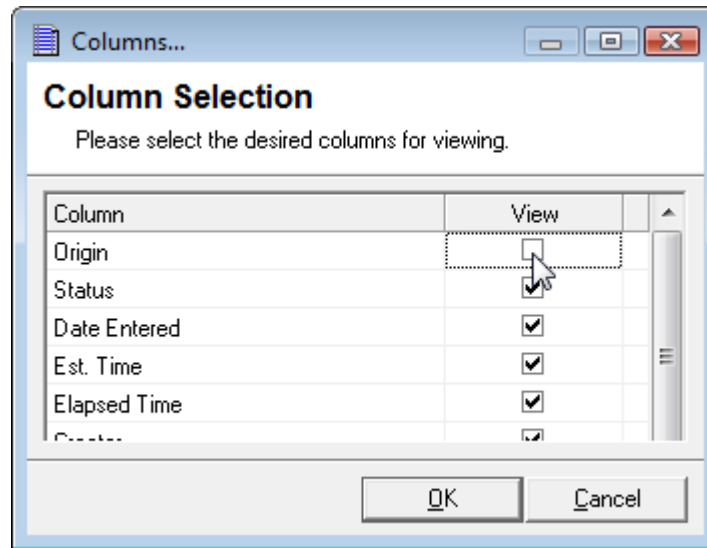
(Figure 2.1)



In the **Column Selection** window that opens, select which columns to view (see Figure 2.2). Click **OK** to view only the selected columns on the Activities tab.

Note that these selections will still apply the next time the Activities tab is viewed, and can be adjusted as needed.

(Figure 2.2)



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

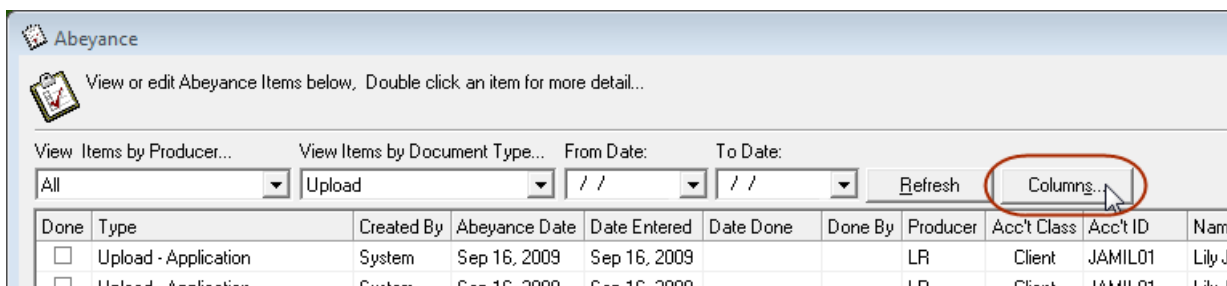
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3. Customizable Abeyance View

TBW users can now select which columns to view and print in the Abeyance window and also on the Abeyance tab in a client's Folder Details.

To open the Abeyance window, double-click **Abeyance** in the **Desktop Tree**. To customize the column view in the Abeyance window, click the **Columns** button (see Figure 3.1).

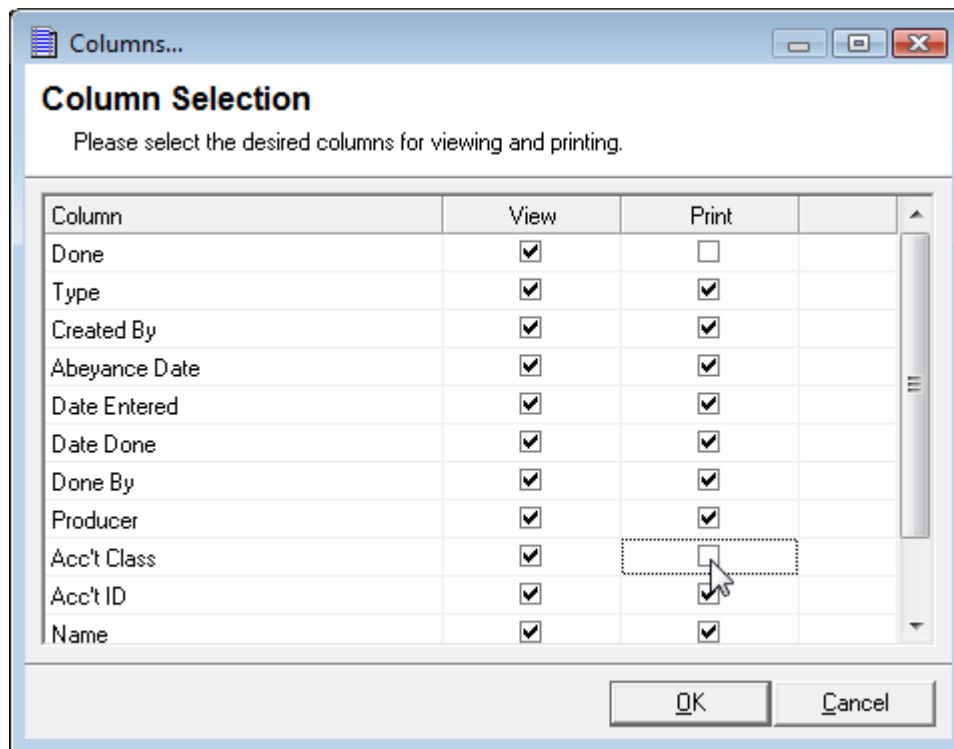
(Figure 3.1)



The **Column Selection** window will open. Select which columns to **View** in the Abeyance window and which columns to **Print** when printing a list of Abeyances from the window (see Figure 3.2). Click **OK** to apply your selections.

- Note that these selections will still apply the next time the Abeyance window is opened, and can be adjusted as needed.

(Figure 3.2)



The **Columns** button is also available on the **Abeyance** tab in **Folder Details**. Double-click the client's Folder Details in the Desktop Tree and click the **Columns** button on the Abeyance tab. Select which columns to **View** in the window and which to **Print** in an Abeyance list. Click **OK**.


Once again, the options chosen will apply the next time the Abeyance tab is viewed and can be adjusted as needed.

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

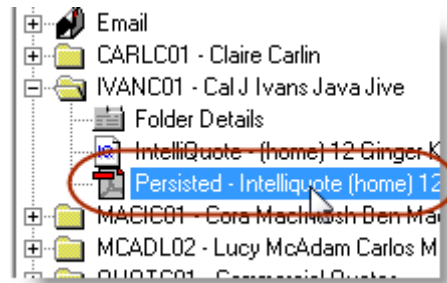
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4. Additional Dwelling Details in Persisted IntelliQuote

We are pleased to announce an enhancement to the habitational IntelliQuote that adds additional details to the persisted IQ. The new information includes underwriting data on dwellings and miscellaneous property.

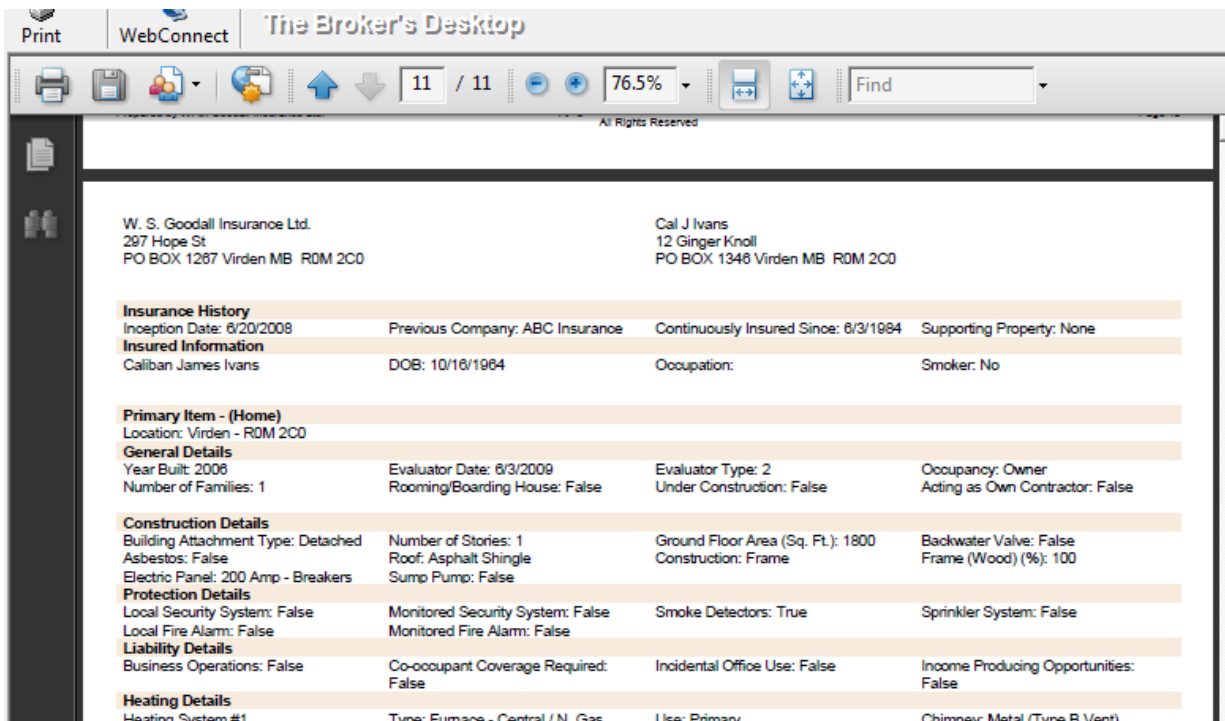
To view these additional dwelling details, first complete the habitational IQ. Then, click the **PDF Snapshot**  button on the **IQ toolbar** to persist the IQ. The persisted IQ will appear in the Desktop Tree (see Figure 4.1).

(Figure 4.1)



Double-click the document to view it in the Document Window, and then scroll to the last page to view the additional dwelling details (see Figure 4.2).

(Figure 4.2)



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

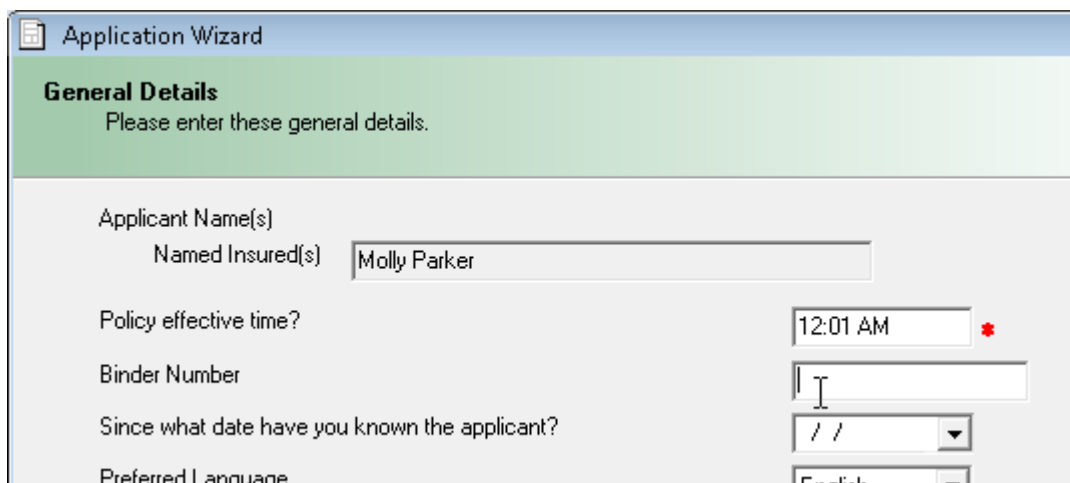
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5. Enhanced Habitational Application

We are pleased to announce that Applications created for property IntelliQuotes dated on or after August 1, 2010 will now use the 2008 version of the CSIO Habitational Application. It has been enhanced to include additional details, including the following:

- **Binder Number**
 - In the **General Details** window in the **Application Wizard**, enter the **Binder Number** (see Figure 5.1).

(Figure 5.1)



The screenshot shows a window titled "Application Wizard" with a "General Details" section. The section contains the following fields:

- Applicant Name(s): Molly Parker
- Named Insured(s): Molly Parker
- Policy effective time?: 12:01 AM
- Binder Number: [Empty field]
- Since what date have you known the applicant?: [Empty field]
- Preferred Language: English

- The Binder Number can be viewed in the upper right-hand corner of the first page of the Application.
- **Claims History Report Date**
 - View the **Claims History Report Date** on the first page of the Application in the **Loss History** section (see Figure 5.2).

(Figure 5.2)

Y YEARS CONTINUOUSLY EMPLOYED | DATE OF BIRTH 1990/10/10 | YEARS CONTINUOUSLY EMPLOYED | DATE OF BIRTH

OCCUPANCY DATE | IF OCCUPANCY DATE IS LESS THAN 3 YEARS, PROVIDE PREVIOUS ADDRESS | POSTAL CODE

5. LOSS HISTORY | CLAIMS HISTORY REPORT DATE 2004/08/02

HAVE THERE BEEN ANY LOSSES OR CLAIMS BY THE APPLICANT IN THE PAST 5 YEARS? YES NO | IF YES, COMPLETE THE CHART BELOW

LOSS DATE	LOC. #	CAUSE	CLAIM SETTLED (Y/N)	PAID AMOUNT	POLICY NUMBER	INSURANCE COMPANY

6(A). POLICY HISTORY | FIRST TIME INSURED

HAS ANY INSURANCE COMPANY REFUSED TO PROVIDE INSURANCE IN THE PAST 5 YEARS? YES NO | IF YES, INDICATE INSURANCE REFUSAL TYPE: CANCELLED DECLINED REFUSED RENEWAL RESTRICTED COVERAGE

BY WHICH INSURANCE COMPANY _____ REASON _____

NAME OF PREVIOUS INSURANCE COMPANY ABC Insurance | SINCE WHAT DATE HAS THE APPLICANT HAD _____

- **Policy History Expanded Features**

- In the **History** window in the Application Wizard, enter additional policy history details (see Figure 5.3).

(Figure 5.3)

Application Wizard

History
Please enter the cancellation and policy history details.

Has any insurance company refused to provide insurance in the past 5 years?
If Yes, indicate insurance refusal type:

Cancelled: No *

Declined: No *

Refused Renewal: *

Restricted Coverage: Yes / No *

Insurance Company: _____

Reason: _____

If yes to above please supply Company Name, Policy Number and description or explanation.
Max 1 lines

- View expanded policy history details in the **Policy History** section on the first page of the Application (see Figure 5.2).
- **Heating Location**
 - View heating location details for Primary and Auxiliary Heating Apparatus in the **Rating Information** section on page 2 of the Application.

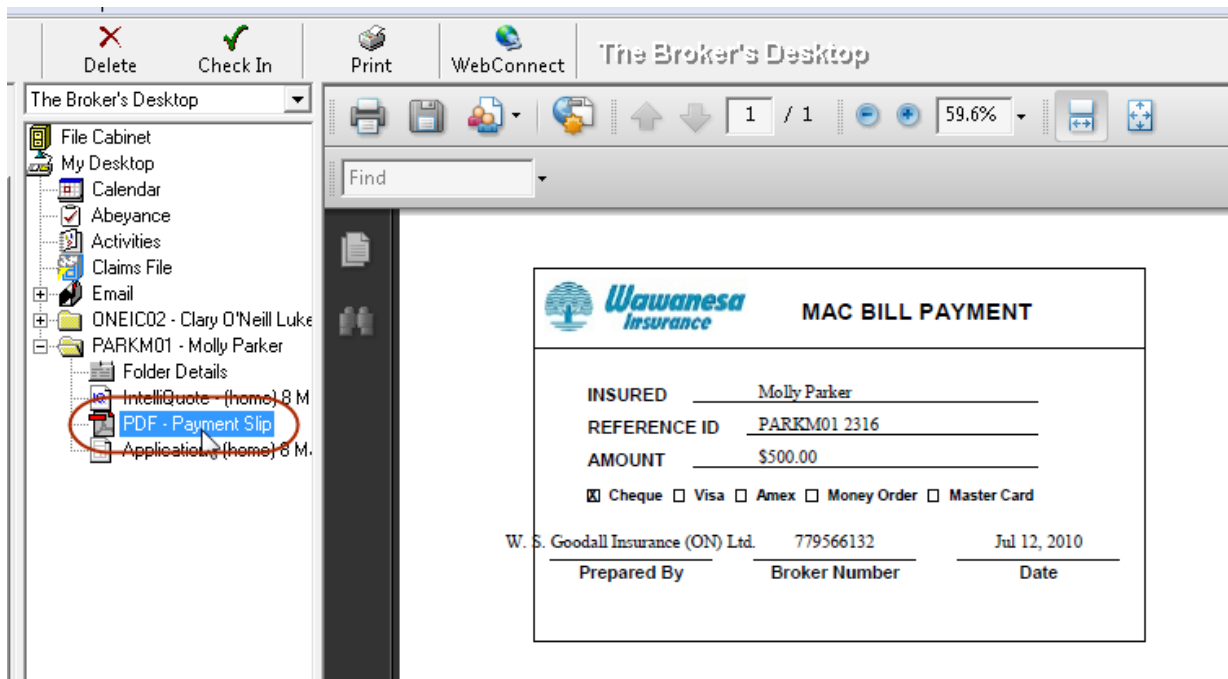
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6. Payment Slip for Wawanesa New Business Applications

Previously, new business Applications for Wawanesa with a Direct Bill or MAC billing method presented the TBW user with an Attention window indicating details to include on the Payment Slip. We are pleased to announce an enhancement to TBW that creates a Payment Slip document for Wawanesa new business Applications with either of these billing methods.

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, the Payment Slip will appear in PDF format in the Desktop Tree, along with the new Application. Double-click the Payment Slip to open and view it in the Document Window (see Figure 6.1).

(Figure 6.1)

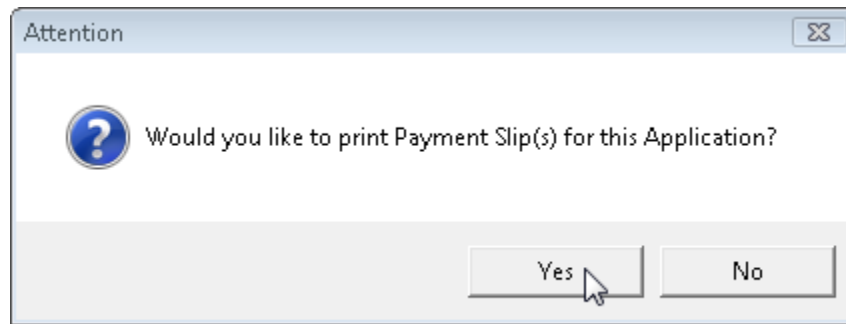


To print a copy of the Payment Slip, click the **Print**  button on the TBW toolbar when the Payment Slip is open in the Document Window.

The Payment Slip can also be printed with the Application. Click the **Print** button when the Application is open in the Document window, and then click **Yes** in the **Attention** window to print the Payment Slip (see Figure 6.2).

- Please note, if multiple Payment Slips are attached to the Application, all will be combined and printed at one time.


(Figure 6.2)



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

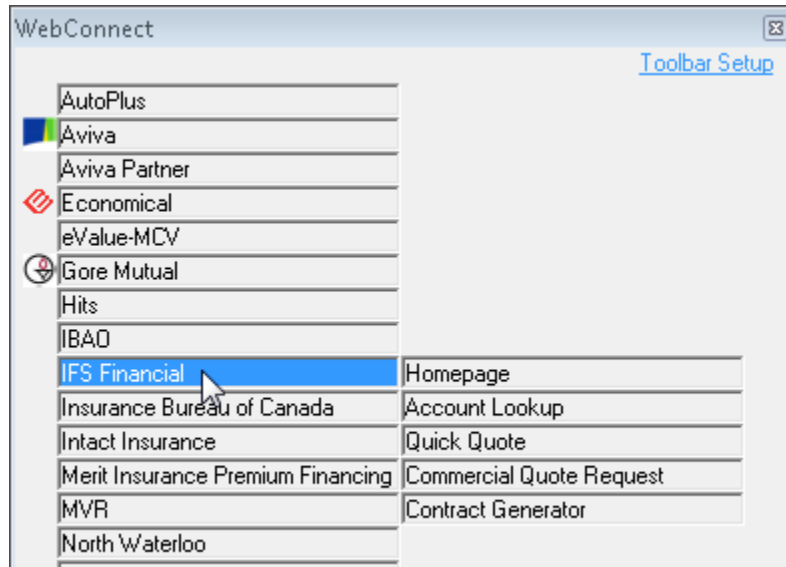
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7. Access IFS Financial Services through TBW's WebConnect

The WebConnect feature allows the TBW user to access specific insurance company and service bureau websites quickly and easily, directly from the TBW interface. Click the **WebConnect**  button on the TBW toolbar to open the Webconnect window and view the list of companies and services available.

We are pleased to announce that WebConnect can now be used to access **IFS's online Broker System** for finance quoting for all lines of business, contract generation, and account information (see Figure 7.1).

(Figure 7.1)



In the WebConnect window, the IFS Financial WebConnect feature offers the following options:

Homepage

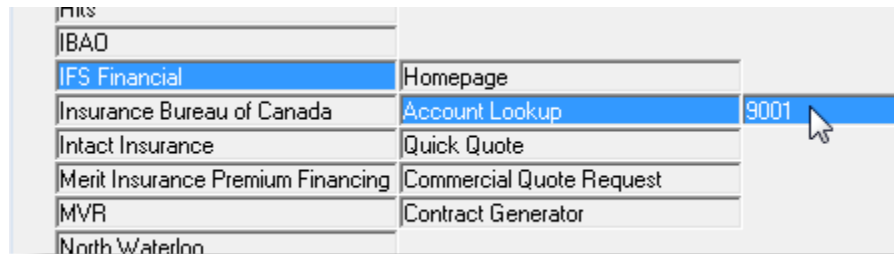
In the **WebConnect** window, click **IFS Financial, Homepage** to open the IFS homepage in your web browser and access options such as Broker Login, Customer Support, and information about IFS.

Account Lookup

Select **Account Lookup** to access details regarding a particular client account.

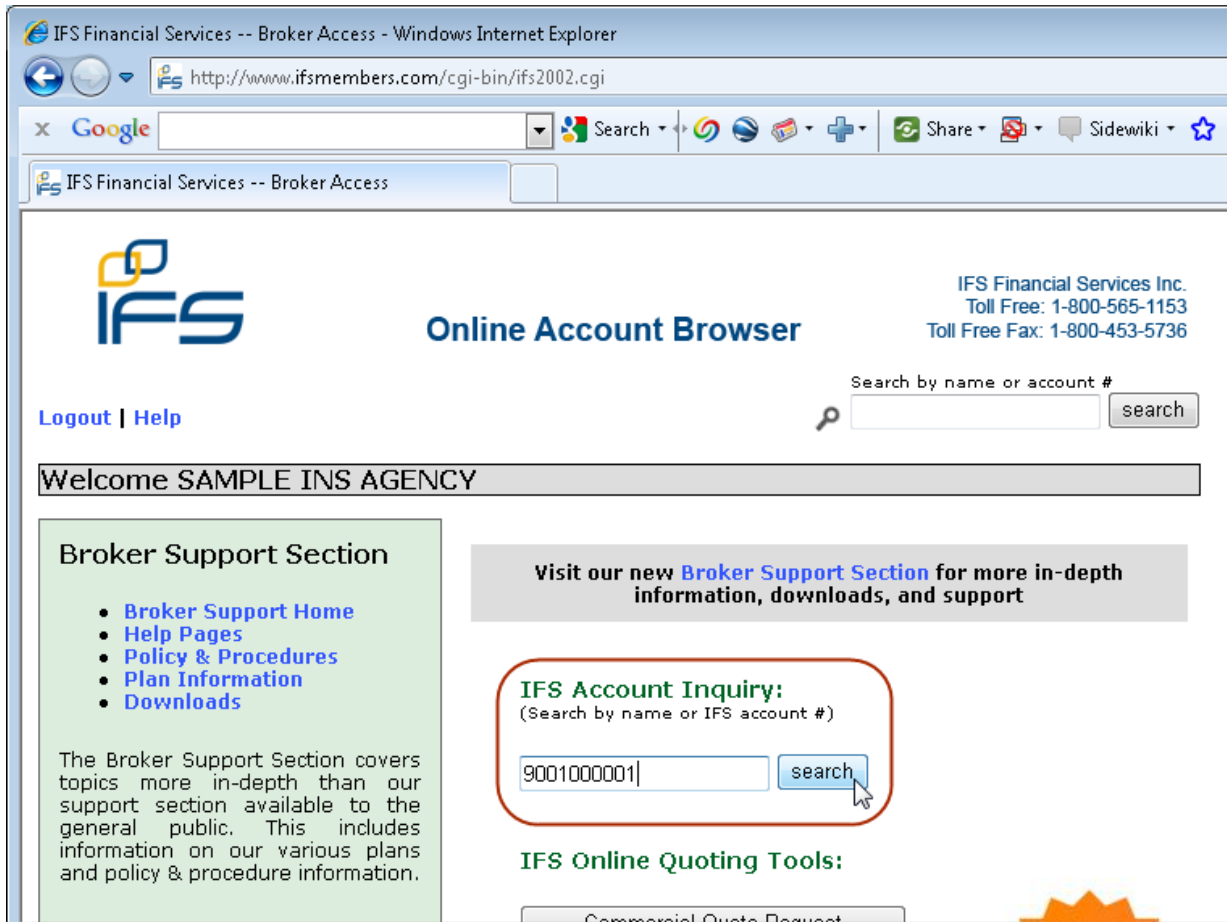
- i. In the WebConnect window, select **IFS Financial, Account Lookup**, and then the **Username** (see Figure 7.2).

(Figure 7.2)



- ii. In the **Online Account Browser** window, enter the client name or IFS Account Number in the **IFS Account Inquiry** box, and then click **Search** (see Figure 7.3).

(Figure 7.3)



iii. View account details in the window (see Figure 7.4).

(Figure 7.4)

IFS Online Account Browser

IFS Financial Services Inc.
Toll Free: 1-800-565-1153
Toll Free Fax: 1-800-453-5736

Logout | Help
Broker: 9001 SAMPLE INS AGENCY

Search by name or account # search home

Account for: RICHARDS,FRANK

[Pre-Authorized Payment Application](#) [Report a Payment for this Account](#)

Account Number	9001000001	Payment Schedule	Coupons
Brokers Reference	RICH1	Account Status	OK 2003-05-07
Name 1	RICHARDS,FRANK	Status Remark	Rebate to OK
Name 2	Ann	Total Premium	1200.00
Address	123 MAIN ST	Down Payment	300.00

Quick Quote

Select **Quick Quote** to request a Personal Lines quote.


- i. In the Webconnect window, select **IFS Financial, Quick Quote**, and the **Username**.
- ii. In the **Online Account Browser** window, click the button.
- iii. Enter requested details in the **IFS Quick-Quote** window, and click **Process Quote** (see Figure 7.5).

(Figure 7.5)

The screenshot shows a web browser window titled "IFS Financial ...". The main heading is "IFS Quick-Quote". The form contains the following fields and controls:


- Total Premium:** Text input field containing "8500".
- Tax Amount:** Text input field followed by "% or \$" and another text input field.
- Fees:** Text input field.
- Minimum Retained:** Text input field.
- Broker Funding:** Dropdown menu with "30 Day Hold" selected.
- Policy Type:** Dropdown menu with "Auto" selected.
- Options:** Dropdown menu with "-----" selected.
- Continuous:** Dropdown menu with "No" selected.
- Policy Term:** Dropdown menu with "12" selected.

At the bottom of the form, there are two buttons: "Process Quote" (highlighted with a mouse cursor) and "Quick Quote Help". Below the buttons is a text message: "For custom quotes please call 1-800-565-1153 to speak with a representative." and a link "close window".

- iv. View quote details in the IFS Quick-Quote window.
 - o Click the **Print**  button to print the quote, click the **New Quote** button to do another quote, or click the **Generate Contract** button to open the **Online Contract Generator** window.

Commercial Quote Request

Select **Commercial Quote Request** to request a Commercial quote.

- i. In the Webconnect window, select **IFS Financial**, **Commercial Quote Request**, and the **Username**.
- ii. In the **Online Account Browser**, click the  button.
- iii. Enter requested details in the **Commercial Quote Request** window (see Figure 7.6), and click **Request Commercial Quote**.

- Note that the quote will be returned to you by email.

(Figure 7.6)

The screenshot shows a web browser window with the URL <http://www.ifsmembers.com/>. The page title is "Commercial Quote Request" and features the IFS logo. The form is divided into two sections: "Premium Information" and "Policy Information".

Premium Information

Premium: *	<input type="text"/>
Fee:	<input type="text"/>
Tax:	<input type="text"/>
Total:	0.00

Policy Information

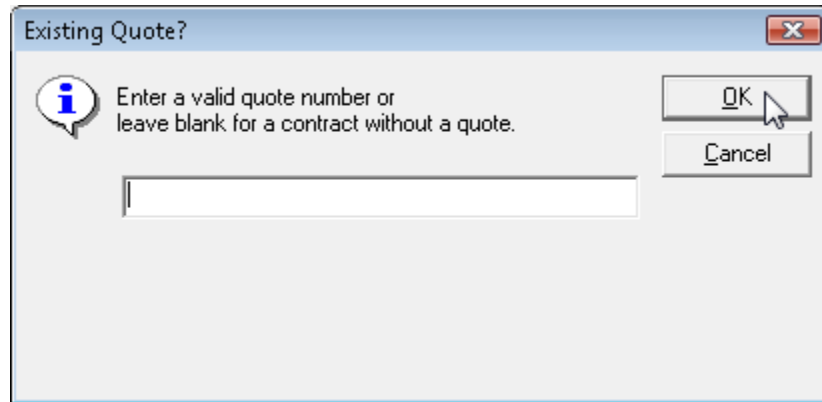
Policy Date (mm/aa/yyyy): *	<input type="text"/>
Policy Number:	<input type="text"/>

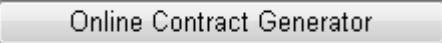
Contract Generator

Select **Contract Generator** to create a new contract.

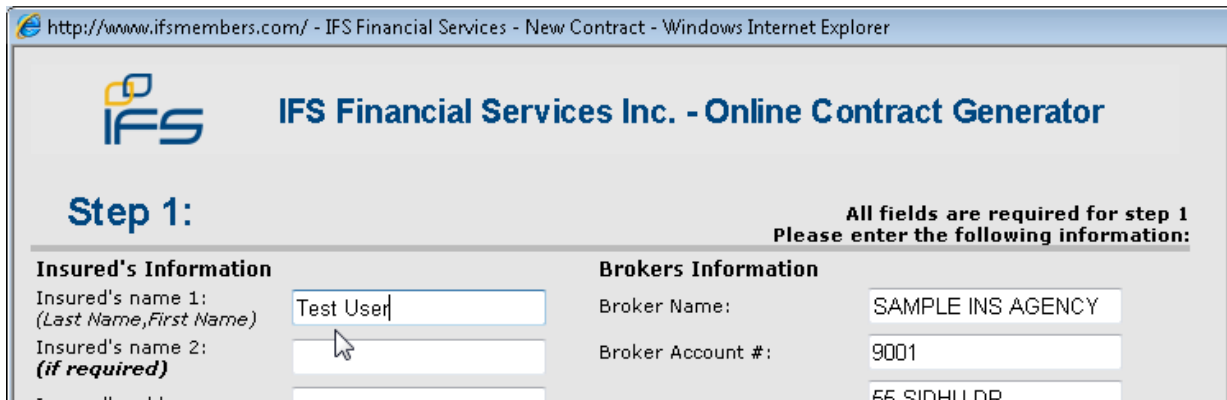
- In the Webconnect window, select **IFS Financial, Contract Generator**, and the **Username**.
- In the **Existing Quote** dialog, either enter a valid quote number or leave the box blank for a contract without a quote, and then click **OK** (see Figure 7.7).

(Figure 7.7)



- iii. In the **Online Account Browser**, click the  button.
- iv. Enter requested details in the **Online Contract Generator** window (see Figure 7.8), and then click the **Generate Contract for Printing** button to view the completed contract ready to print and sign.

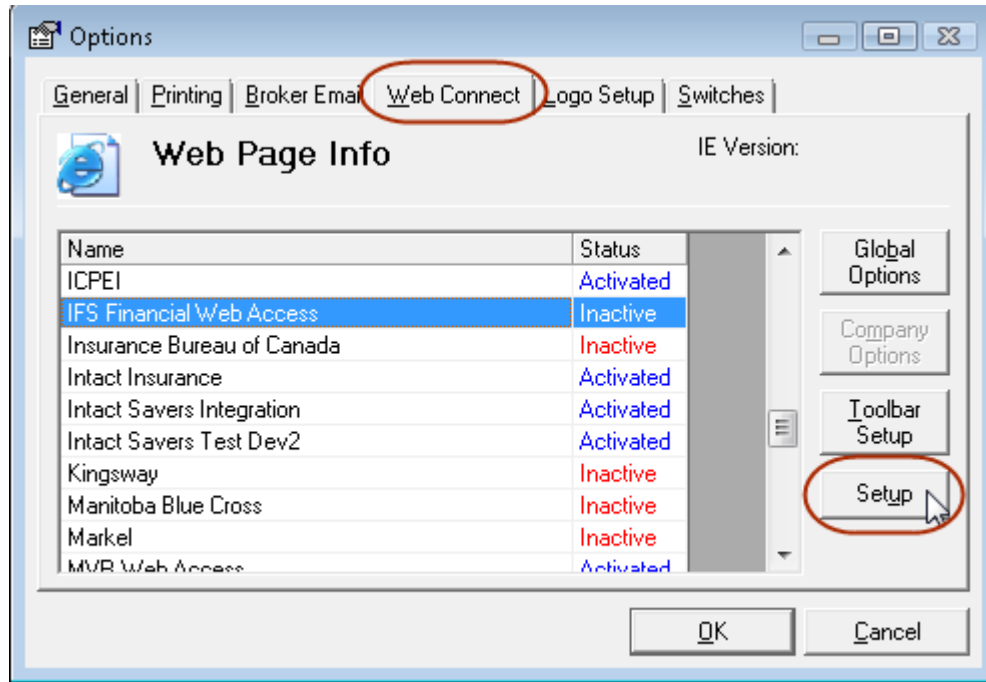
(Figure 7.8)



Please remember that access to TBW's WebConnect feature is controlled by **User Rights (Tools, Administrative, User Manager, Rights)**.

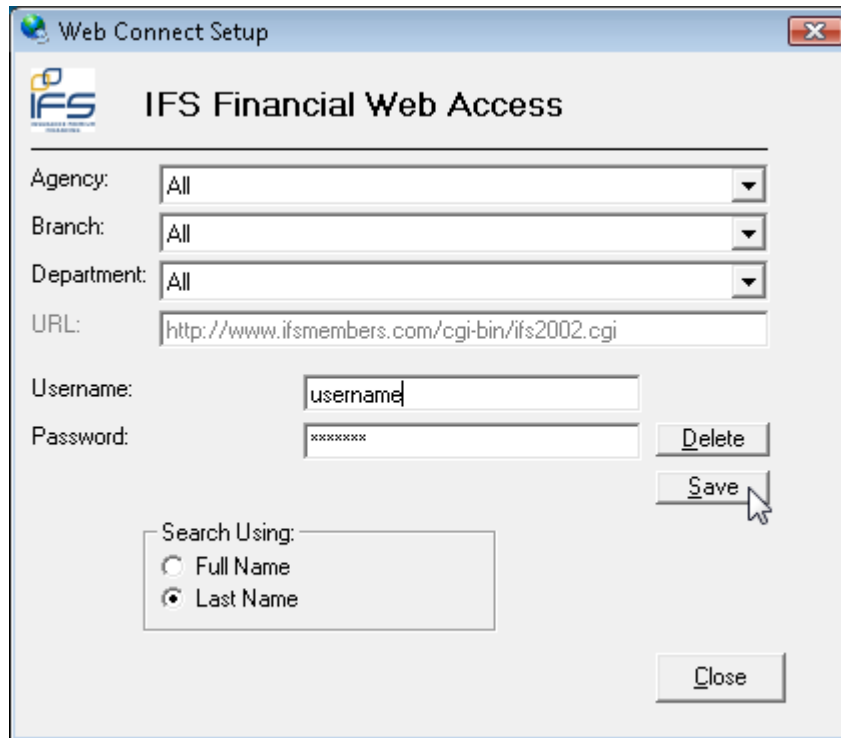
To activate IFS Financial for WebConnect use, click **Tools, Options**. On the WebConnect tab, select **IFS Financial Web Access**, and then click the **Setup** button (see Figure 7.9).

(Figure 7.9)



In the WebConnect Setup window, select an Agency/Branch/Department, and enter the Username and Password. In the **Search Using** section, select whether to perform online searches (e.g. Account Inquiry by client name) for IFS by **Full Name** or **Last Name** only. Click **Save**, and then click **Close** (see Figure 7.10).

(Figure 7.10)



The company will be listed as **Activated** in the WebConnect Company List.

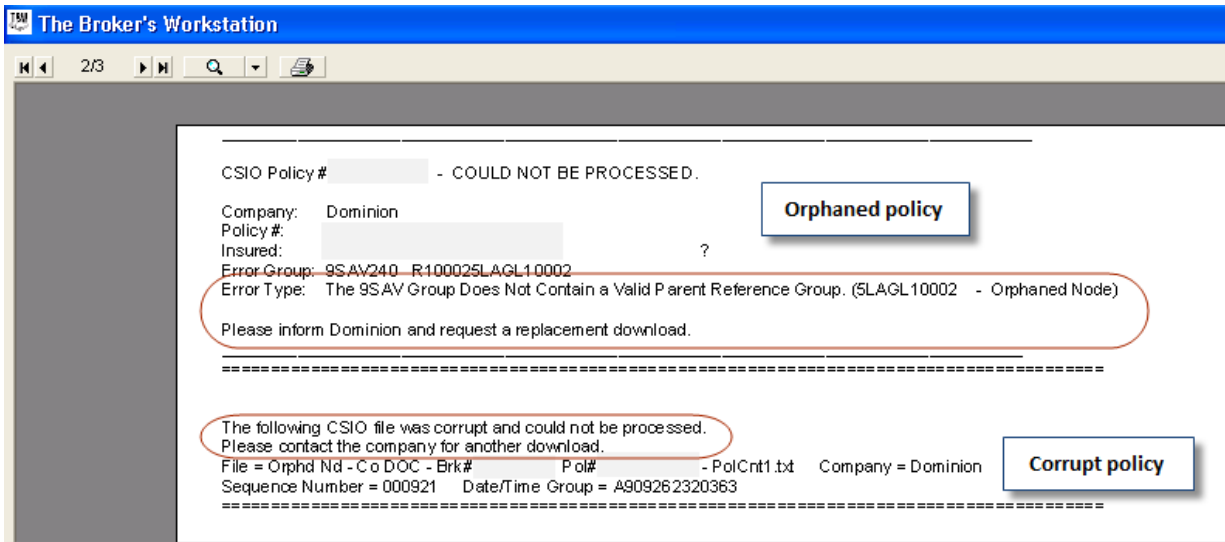
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8. Manage Problem Policies in CSIO Download

We are pleased to announce an enhancement to the CSIO download procedure that will manage any problem policies while allowing the rest of the file or policies to process normally.

While the CSIO policies are being downloaded, each policy will be assessed for validity. If one or more policies are found to be corrupt or “orphaned” (i.e. without a parent group), each will be listed in the log file. Instructions as to how to proceed with the policy and relevant details, such as the originating insurance company and policy number, will be included in the log file (Figure 8.1).

(Figure 8.1)



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

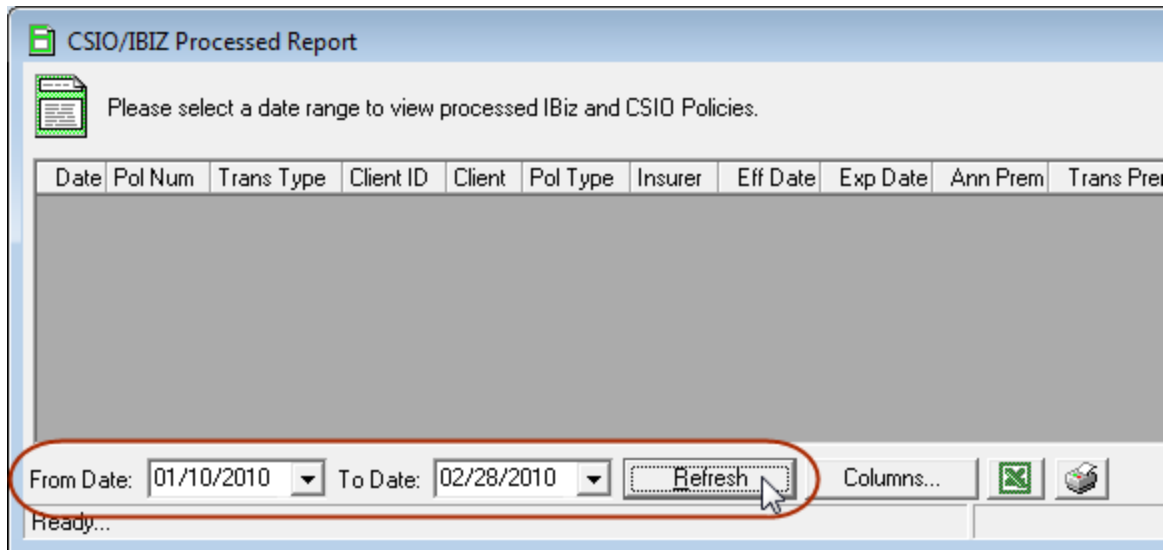
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9. New Processed CSIO / I-Biz Report

We are pleased to introduce the new Processed CSIO / I-Biz Report, which provides the broker with information necessary to track and transact a processed transaction prior to receiving the paper copy of the policy.

To create the **Processed CSIO / I-Biz Report**, click **Reports, Processed CSIO/IBiz Report**. In the CSIO/IBiz Processed Report dialog, enter or select the date range for processed policies using the **From Date** and **To Date** fields, and then click **Refresh** (see Figure 9.1). Policies processed during the selected date range will be listed.

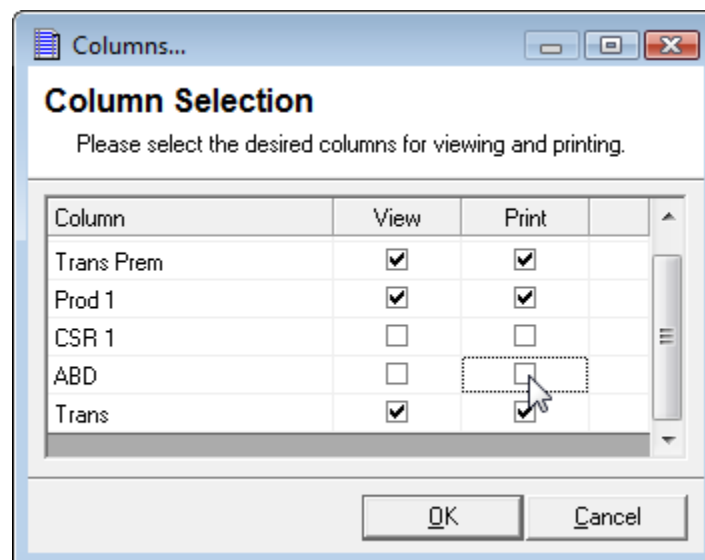
(Figure 9.1)





Please note the following when working with the Processed CSIO / I-Biz Report:

- To sort the report by a particular column, simply click the column heading.
- To customize the report view, click the **Columns...** button. In the **Columns** dialog, select or deselect columns to view and print (see Figure 9.2), and then click **OK**.
 - Note that these selections will still apply the next time the report dialog is viewed, and can be adjusted as needed.

(Figure 9.2)



- To export report results to Microsoft Excel for viewing, editing, or further analysis, click the  button.
- To print report results, click the  button.
- A user must be given rights to work with the Processed CSIO / I-Biz Report (Tools, Administrative, User Manager, Rights).

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

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10. 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 habitation 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 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.

