



31 August 2010

To: The Broker's Workstation Users and The Underwriter's Workstation Users

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. [Show the Abeyance Window on TBW Login](#) – This enhancement allows the user to set the Abeyance window to open automatically on TBW login.
2. [Minimize the Abeyance Window](#) – The TBW user can now minimize (rather than close) the Abeyance window while completing other tasks in TBW.
3. [Select Company Mailing Address in Company Memo](#) – The Company Memo in Request documents has been enhanced with the ability to select the relevant Company mailing address.
4. [Copy Field Definition Visibility Settings in Rating Definition Coverage Item Details \(Commercial Module / TUW\)](#) – Use the Copy Context menu to copy Field Definition Visibility settings to multiple fields at once.

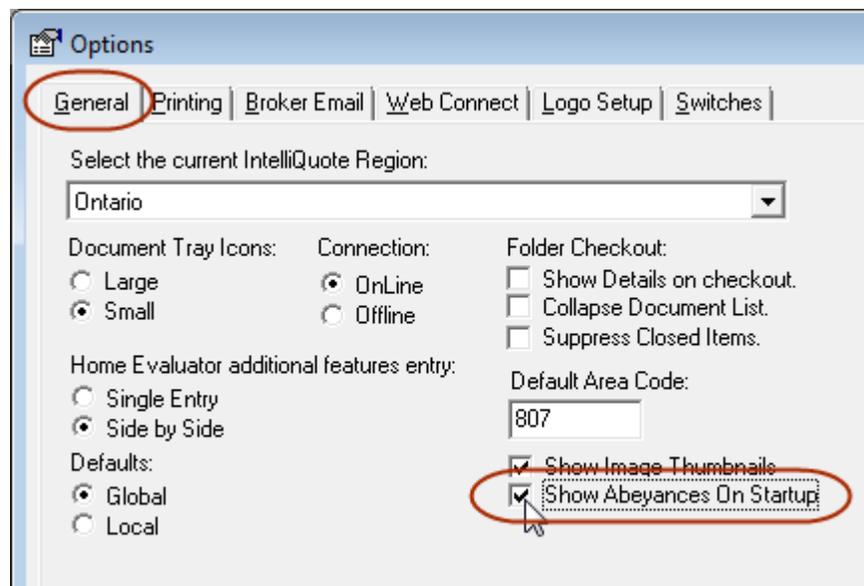
5. [Enhancements to Rating Definition Coverage Items Library \(Commercial Module / TUV\)](#) – Additional items have been added to the Rating Definition Coverage Items Library, including a Vacant Dwelling Section, Locked Vehicle Warranty, and more.
6. [Questionnaires Tab in The Underwriter's Workstation \(TUV\)](#) – Questionnaires will display on the Questionnaires Tab in the Document Tray in TUV.

1. Show the Abeyance Window on TBW Login

We are pleased to announce that the Abeyance window can now be set to open automatically upon user login to TBW.

To enable this option, click **Tools, Options**. On the **General** tab in the **Options** window, select **Show Abeyances on Startup** (see Figure 1.1). Click **OK**.

(Figure 1.1)



The next time the user logs into TBW, the Abeyance window will open immediately.

- Note that the user's default search criteria will be applied.

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

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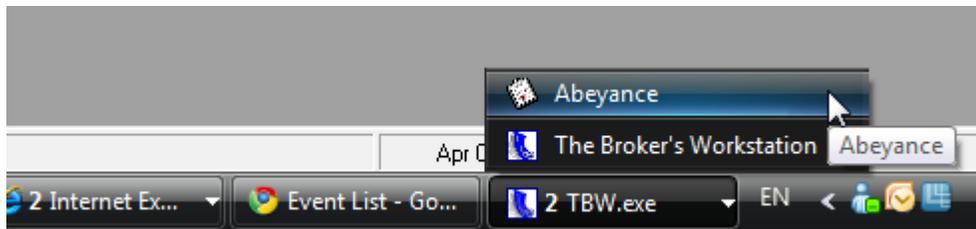
2. Minimize the Abeyance Window

TBW users have requested the ability to leave the Abeyance window open while working on other tasks in TBW. We are pleased to announce a program enhancement that allows the user to minimize the Abeyance window while completing other tasks in TBW, and then return to the Abeyance window at a later time.

The **Minimize**  **button** is found in the top right corner of the Abeyance window. Simply click the Minimize button to set the window aside. While the window is minimized, the TBW user can work with a client document or folder, modify a word processing template, send a TBW email, or complete other tasks in TBW.

To re-open the Abeyance window, find TBW on the **Status bar**, click the arrow to view available windows, and click **Abeyance** (see Figure 2.1).

(Figure 2.1)



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

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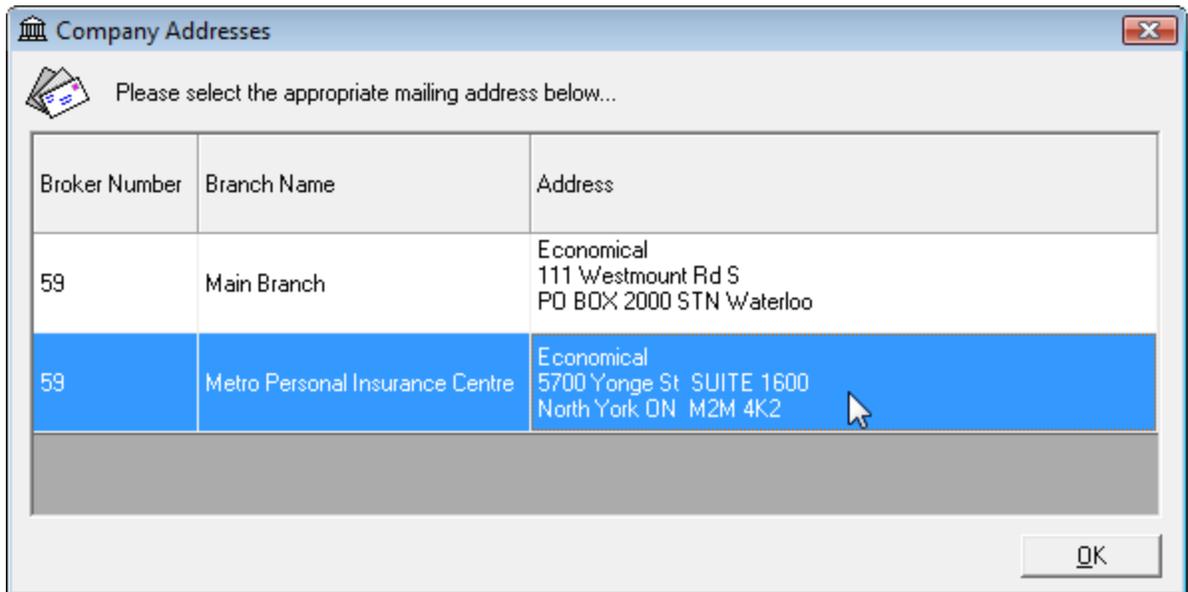
3. Select Company Mailing Address in Company Memo

We are pleased to announce an enhancement to the Company Memo that allows the TBW user to select which Company mailing address to insert in the document.

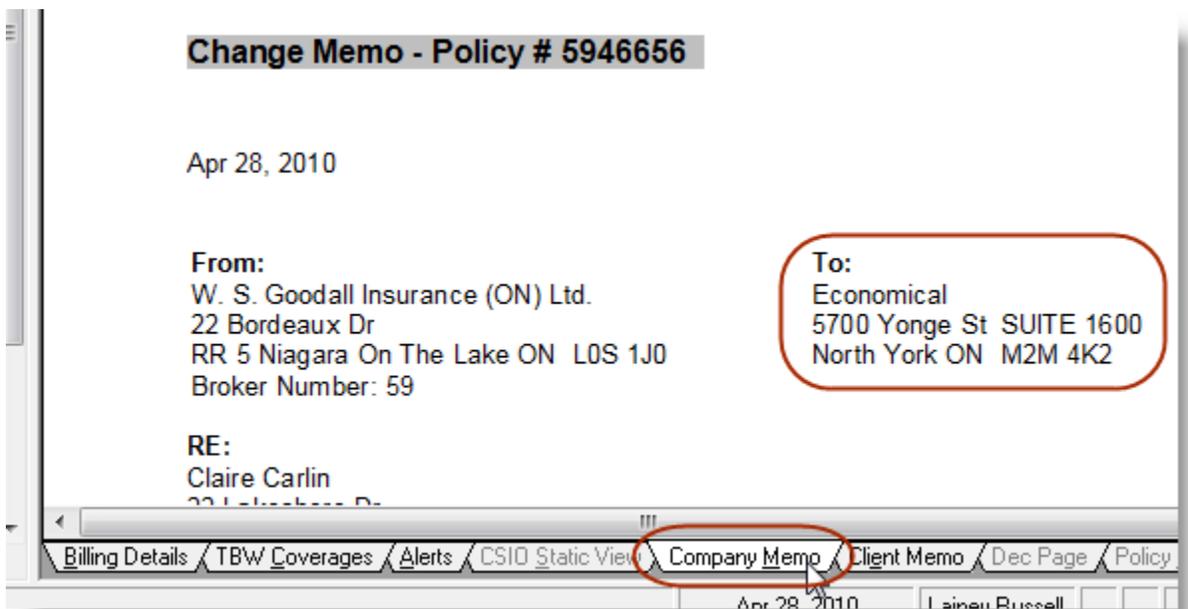
Previously, the "To" address in the Memo was automatically pre-populated with the company address associated with the relevant Broker Number. However, as a Broker Number may be associated with more than one Agency/Branch/Department and Insurance Company address, the Memo has been updated to allow selection of a particular mailing address.

After details for the Request document have been entered, the **Company Addresses** dialog will open automatically. Select the appropriate mailing address from the list, and then click **OK** (see Figure 3.1). The selected address will appear in the "To" section of the Company Memo (see Figure 3.2).

(Figure 3.1)



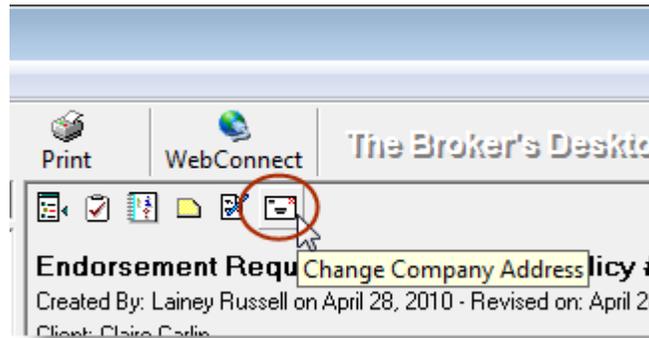
(Figure 3.2)



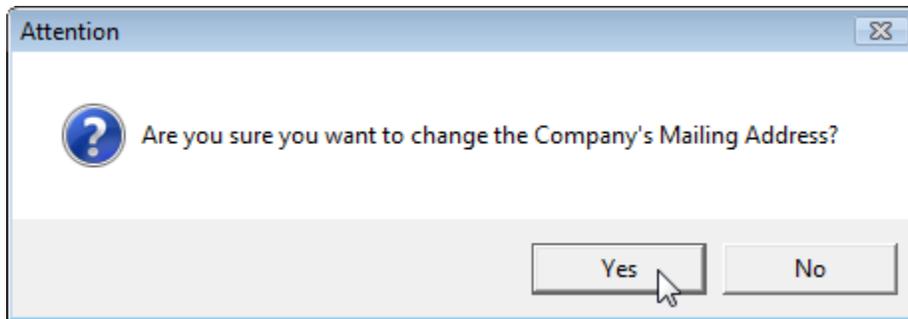
Note that this prompt to select the Company mailing address will appear automatically only on the first request for each policy, and future memos will continue to use the address selected in this step. However, a different address can be chosen at any time by clicking the **Change Company Address** button on the **Company Memo toolbar** (see Figure 3.3). Click **Yes** in the **Attention** dialog to select

another mailing address (see Figure 3.4), and then select the new mailing address in the **Company Addresses** dialog. Click **Yes** in the **TBWPolicy** window to update the text in the memo with the selected address (see Figure 3.5).

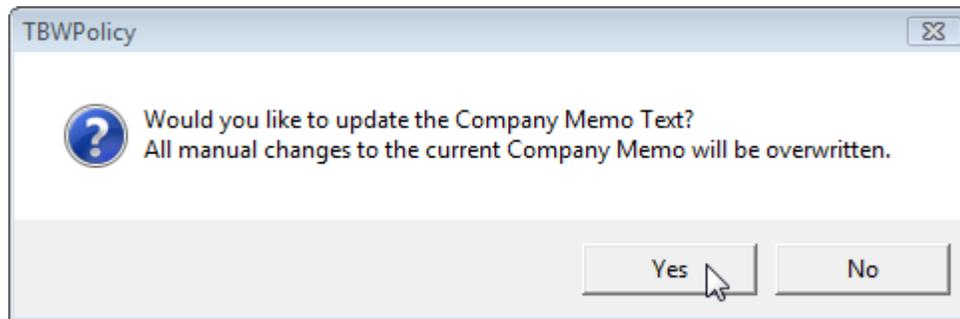
(Figure 3.3)



(Figure 3.4)



(Figure 3.5)



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

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4. 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, CAIB, CIP. 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 and remote 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 at www.cssionline.com/training.htm to view a schedule of upcoming classes or to register for training.

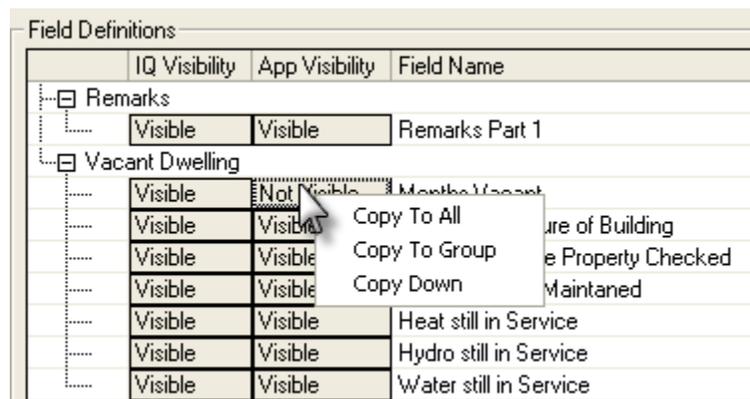
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5. Copy Field Definition Visibility Settings

TBW Commercial and TUW users have requested the ability to copy Field Definition Visibility settings in the Rating Definition Coverage Item Details. In response to this request from our clients, we are pleased to announce the development of a Copy Context menu that provides the user with copy options for Visibility settings.

To view the Copy Context menu, click **Lists, Rating Definitions**. Double-click the Rating Definition, and click the **Coverage Items** tab in the **Rating Definition** window. Double-click the Coverage Item and then right-click a Field Definition's Visibility setting (see Figure 5.1).

(Figure 5.1)



To copy a Field Definition Visibility setting, select the appropriate choice in the Copy Context menu.

- **Copy To All** – copies the current Field Definition Visibility setting to the entire column
- **Copy To Group** – copies the current Field Definition Visibility setting to the entire Group within the same column
- **Copy Down** – copies the current Field Definition Visibility setting to the rest of the column downward

The setting of the selected Field Definition will be copied to the appropriate fields based on your menu selection.

6. Enhancements to Rating Definition Coverage Items Library

TUW users have requested that additional items be added to the Rating Definitions Coverage Items. In response to these requests, we have made a number of enhancements to the Rating Definition Coverage Item Library.

Additions and enhancements have been made to Coverage Items in the Property and Risks sections of the Rating Definitions Word Library, including the following:

- **Vacant Dwelling Section in Rating Definition, Building, and Risk Details Field Definitions** – The **Building** and **Risk Details** Field Definitions have been enhanced to include a Vacant Dwelling Section. Seven additional data collection fields have been added (see Figure 6.1).

(Figure 6.1)

Vacant Dwelling			
Visible	Visible	Visible	Months Vacant
Visible	Visible	Visible	Anticipated Future of Building
Visible	Visible	Visible	How Often is the Property Checked
Visible	Visible	Visible	Property Being Maintained
Visible	Visible	Visible	Heat still in Service
Visible	Visible	Visible	Hydro still in Service
Visible	Visible	Visible	Water still in Service

- **Holiday Trailer/Camper Unit Form (Broad Form)** has been enhanced with the following data collection fields: Trade Name, Model, Serial Number, and Length (ft) (see Figure 6.2).

(Figure 6.2)

General Details			
Visible	Visible	Visible	Description
Visible	Visible	Visible	External Underwriting Details
Visible	Visible	Visible	Trade Name
Visible	Visible	Visible	Model
Visible	Visible	Visible	Serial Number
Visible	Visible	Visible	Length (ft)

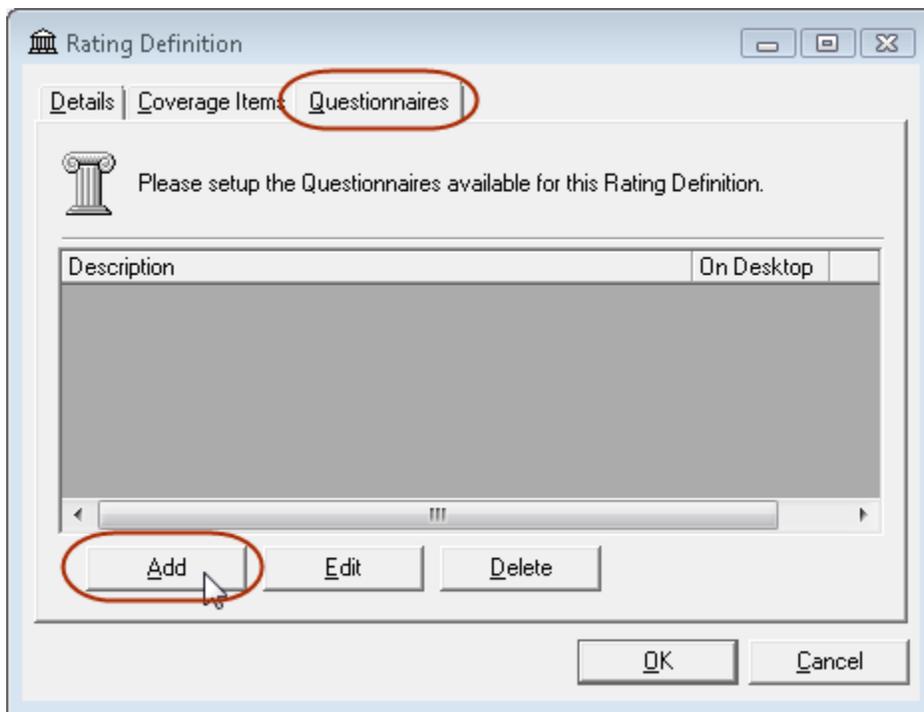
- **Locked Vehicle Warranty** has been added to the Library in the (Misc.) Property section and is now available for use in Rating Definitions.

7. Questionnaires Tab in The Underwriter's Workstation

TUW users now have the ability to create a Questionnaire based on the Coverage Items and Field Definition Visibility selections in a Rating Definition.

To create a Questionnaire from a completed Rating Definition, click **Lists, Rating Definitions**. Double-click the Rating Definition, and click the **Questionnaires** tab in the **Rating Definition** dialog. Click the **Add** button (see Figure 7.1).

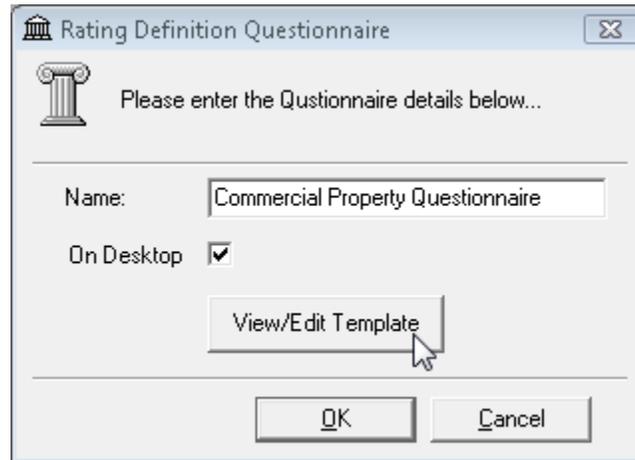
(Figure 7.1)



In the **Rating Definition Questionnaire** dialog that opens, enter a **Name** for the Questionnaire and put a checkmark in the **On Desktop** checkbox. To open the Questionnaire in the TBW word processor window for editing or customization, click the **View/Edit Template** button (see Figure 7.2).

- Be sure to click the **Publish**  button on the word processor toolbar to save any changes made to the Questionnaire before closing the word processor window.

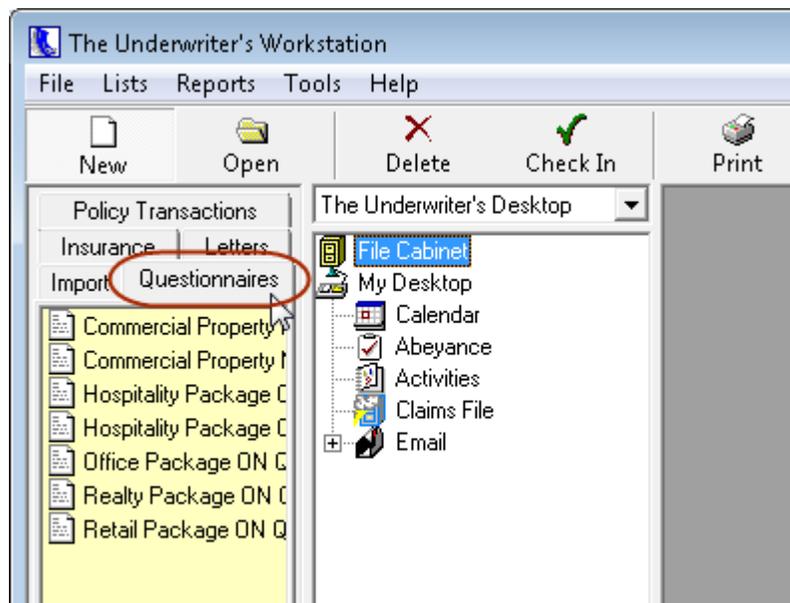
(Figure 7.2)



Click **OK** in the Rating Definition Questionnaire dialog.

Available Questionnaires will appear on the **Questionnaires Tab** in the Document Tray (see Figure 7.3).

(Figure 7.3)



Drag and drop the Questionnaire from the Questionnaires Tray onto a client folder in the Desktop Tree to create a Questionnaire.

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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.

