



3 April 2012

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 enhancement to **The Broker's Workstation (TBW)** and **the Underwriter's Workstation (TUW)**:

Contents

1. [Enhanced MAC Billing Details Form for Wawanesa Applications](#) – The MAC Billing Details form for Wawanesa applications has been updated with additional financial institutions, an “Other Financial Institution” option, and more.

1. Enhanced MAC Billing Details Form for Wawanesa Applications

The MAC Billing Details form for Wawanesa applications has been updated with additional financial institutions, an “Other Financial Institution” option, and more.

With the help of the Application Wizard, complete the **Billing Details** form for a **MAC Billing Method** as usual, noting the following (see Figure 1.1):

- All required details are marked with a red asterisk (*).
- Many new **Financial Institutions** are available for selection in the drop-down menu.
- When a Financial Institution is selected, the **Bank Institution Number** field will automatically prepopulate with a valid bank number.
 - The bank number can be overridden, if required.

- If the applicable institution is not available for selection in the Financial Institution menu, select **"Other,"** and then enter the institution name manually in the **Other Financial Institution** field.
 - If "Other" is selected, the Bank Institution Number will *not* prepopulate and must be entered manually.

(Figure 1.1)

Billing Details
Please enter all the appropriate billing details.

Billing Method: MAC *

Payment Plan: Monthly *

Amount Paid Now: 0 *

Payment Type: *

Accountholder Name: Bill J. Markeson *

Financial Institution: ING Bank of Canada *

Other Financial Institution: *

Cheque Number: *

Transit Number: 00099 *

Bank Institution Number: 614 *

Account Number: 7005469 *

Withdrawal Date: *

Sample Check Number: ||0649|:05468|| 001: 04 || 3102 ||

* Required

All items marked with a Red Asterisk are required

Cancel <Back Next > Finish

If "Other" is selected in Financial Institution menu, enter institution name here

Bank Institution Number will fill automatically when Financial Institution is selected

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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 this feature or need further assistance in its usage, please contact our Client Services Team at 1-888-291-3588 (toll-free telephone) or clientservices@cssionline.com (email).

Thank you for using The Broker's Workstation and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.

