25 June 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 enhancements and newest features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

Contents

1. Enhanced Options when Creating and Printing Pink Cards for Multiple Vehicles

The Pink Cards dialog now includes a Company Address field, which allows the TBW user to select, modify, or manually enter the Company Address to print on the selected Pink Card(s), or to select a blank entry so no address will display on the printed Pink Card(s).

To create multiple Pink Cards, drag and drop the **Pink Card** icon from the **Insurance Tray** onto the client **IQ**, **Application**, or **Policy document** in the Desktop Tree. Select whether to create **Temporary** or **Permanent** Pink Cards, and then click **OK**.

In the **Pink Cards** dialog,

    a. Select the **Company Name**.

    b. In the **Company Address** field, choose one of the following options:
- Select an **applicable address** from the drop-down menu to print on the Pink Card(s).
  - Note that a selected address can be modified, if required, directly in the Company Address field.
  - If no Broker Number/Branch Addresses are available, no addresses will display in the menu.
- **Manually enter** the address to print on the Pink Card(s) directly in the Company Address field.
- Select a **blank entry** to display no company address on the printed Pink Card(s).

    c. Enter the **Binder Number** (if applicable).

    d. If required, adjust the **Effective** and/or **Expiry Date**.

    e. Select one or more vehicles from the list to print (see Figure 1.1), and click **OK**.

(Figure 1.1)
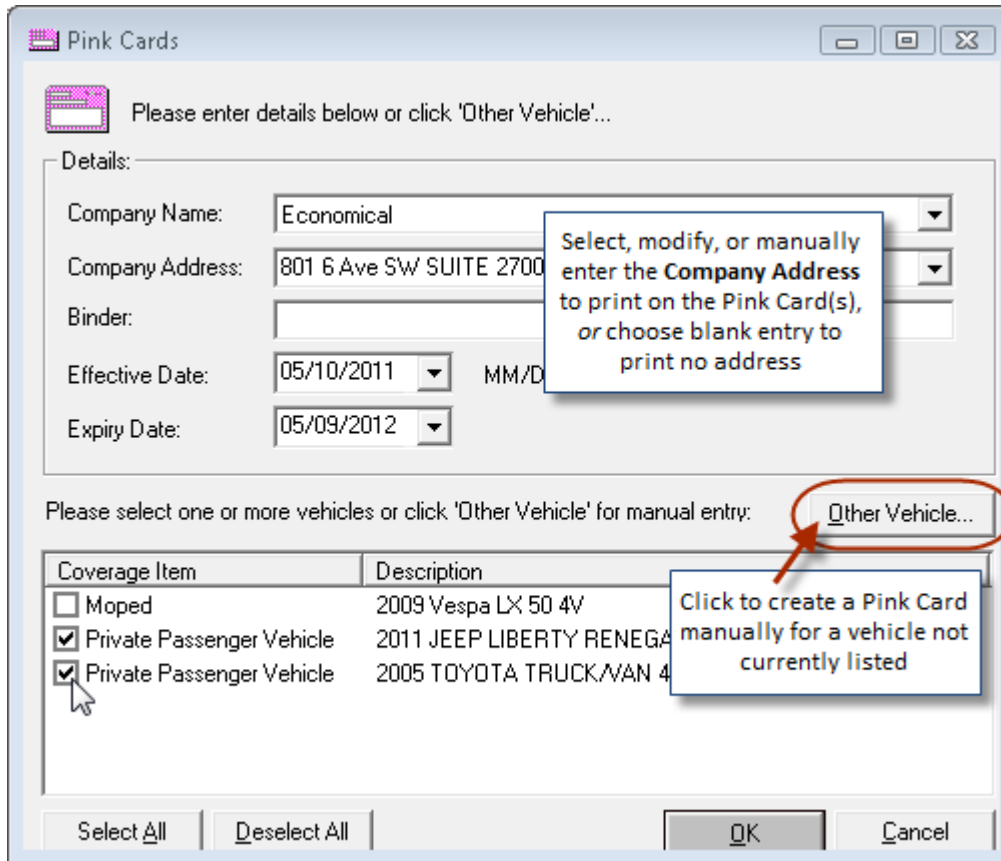
- If required, click the **Other Vehicle** button to create a single Pink Card manually for this client.
- Note that the original **Pink Card Details** dialog will open if the Pink Card icon is dropped onto the Client folder _or_ if the Client folder has only one eligible vehicle.

A Pink Card will be created for each selected vehicle and will appear in the Desktop Tree.
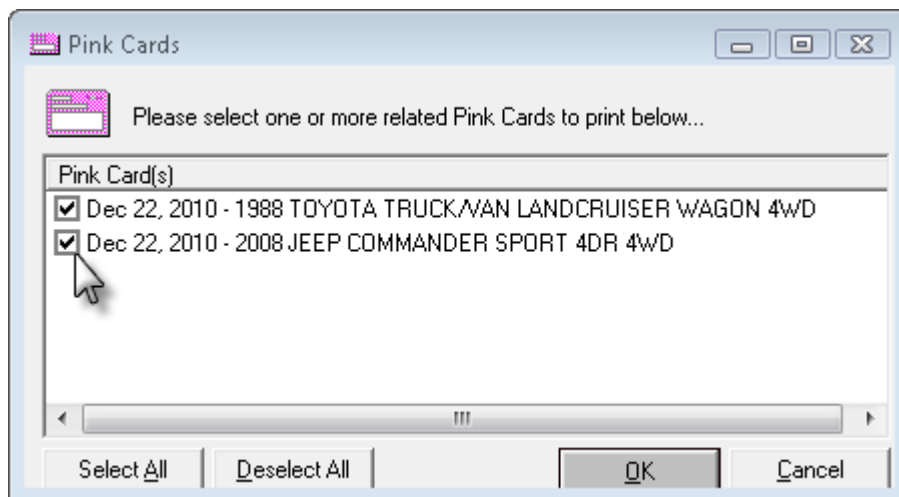
- Note that the name displayed on the Pink Card is the name entered in the **Actual Owner Name** field for the vehicle (see Figure 1.2).
  - _If no data is entered in this field, no name will display on the Pink Card_.
  - If "Insured" or "Same" is entered in the Actual Owner Name field, the name on the Pink Card will instead pull an actual name from one of the following (in this order): the Client Name in the Policy or Application document, the first Named Insured field, _or_ the name on the Client folder itself.

(Figure 1.2)
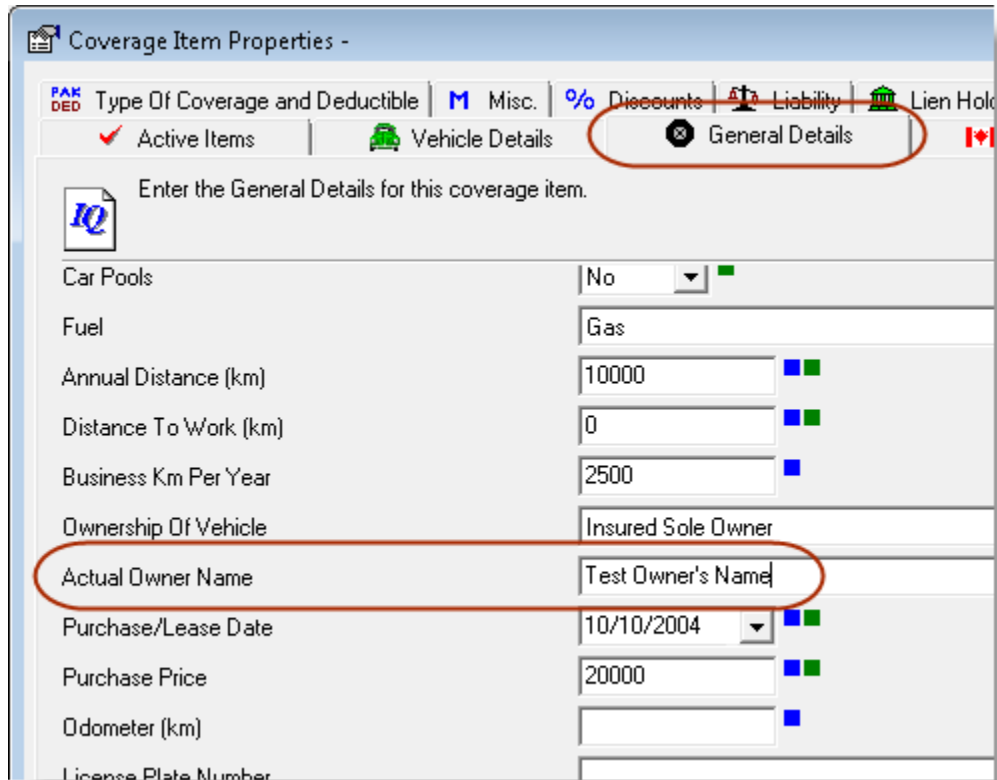
To print multiple Pink Cards at one time, click one of the recently created Pink Cards in the Desktop Tree, and then click the **Print** 🖨 button on the **TBW toolbar**. The **Pink Cards** dialog will appear, listing all related Pink Cards. Select one or more Pink Cards to print, and click **OK** (see Figure 1.3).

(Figure 1.3)

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2. Enhanced Options when Creating and Printing Pink Cards for Commercial Vehicles (Commercial)

The Pink Cards dialog now includes a Company Address field, which allows the user to select, modify, or manually enter the Company Address to print on the selected Pink Card(s) for Commercial vehicles, or to select a blank entry so no address will display on the printed Pink Card(s).

To create commercial Pink Cards, drag and drop the **Pink Card** 🖼 icon from the **Insurance Tray** onto the commercial **IQ**, **Application**, or **Policy document** in the Desktop Tree. Select whether to create **Temporary** or **Permanent** Pink Cards, and then click **OK**.

In the **Pink Cards** dialog,

    a. Select the **Company Name**.

    b. In the **Company Address** field, choose one of the following options:
- Select an **applicable address** from the drop-down menu to print on the Pink Card(s).
  - Note that a selected address can be modified, if required, directly in the Company Address field.
  - If no Broker Number/Branch Addresses are available, no addresses will display in the menu.
- **Manually enter** the address to print on the Pink Card(s) directly in the Company Address field.
- Select a **blank entry** to display no company address on the printed Pink Card(s).

    c. Enter the **Binder Number** (if applicable).

    d. If required, adjust the **Effective** and/or **Expiry Date**.

    e. For documents containing **SEF #21B – Blanket Fleet Endorsement**, choose either **Schedule** or **Fleet**.
- Choose **Schedule** to create a Pink Card for each selected vehicle.
- Choose **Fleet** to create a single Pink Card with the wording "*All Vehicles owned, registered, or leased in the Name of the Insured*."

    f. *For **Schedule***, select one or more vehicles from the list (see Figure 2.1).
- Note that the vehicle selection option is disabled when **Fleet** is selected.

   g. Click **OK**.

(Figure 2.1)
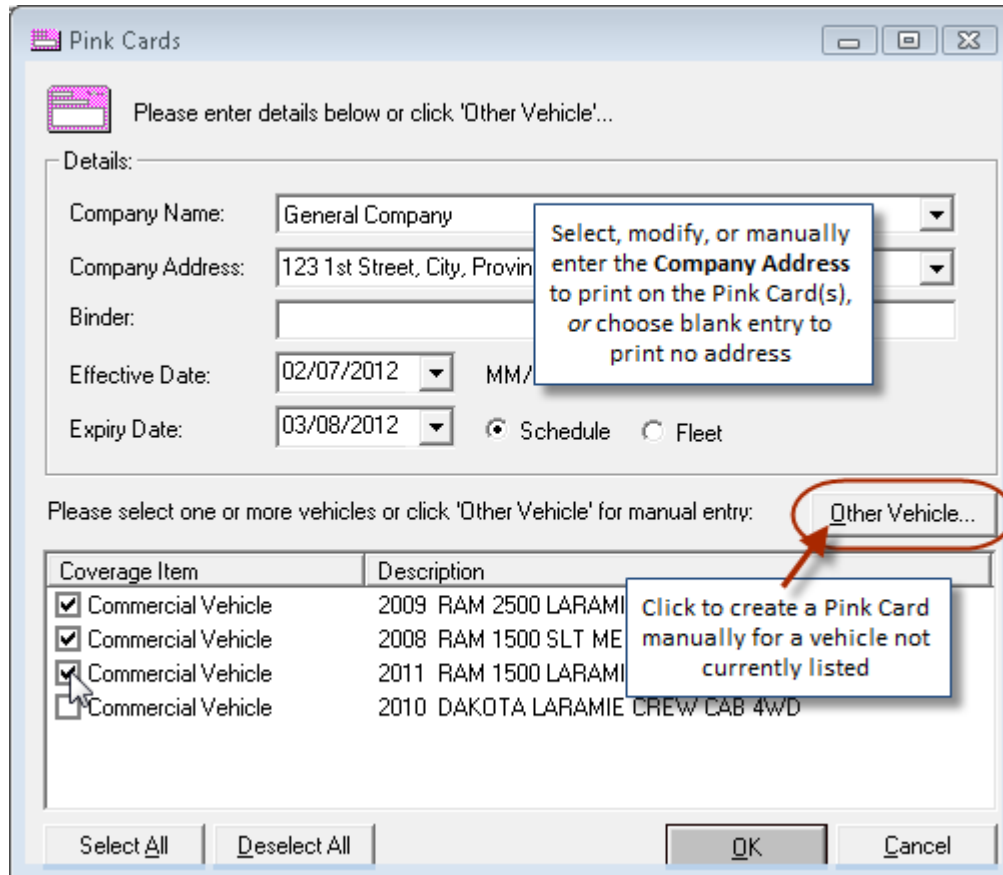
- If required, click the **Other Vehicle** button to create a single Pink Card manually for this client.

The Pink Card(s) will be created and will appear in the Desktop Tree.

- Note that the name displayed on the Pink Card is the name entered in the **Actual Owner Name** field for the vehicle (see Figure 2.2).
  - *If no data is entered in this field, no name will display on the Pink Card.*
  - If "Insured" or "Same" is entered in the Actual Owner Name field, the name on the Pink Card will instead pull an actual name from one of the following (in this order): the Client Name in the Policy or Application document, the first Named Insured field, *or* the name on the Client folder itself.

(Figure 2.2)
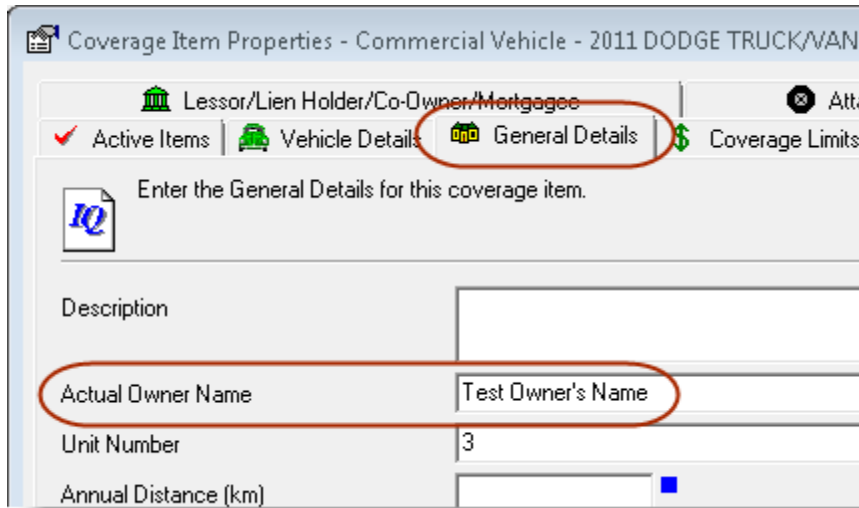
To print one or more Pink Cards for a **Fleet**, click the recently created Commercial Fleet Pink Card in the Desktop Tree, and then click the **Print** button on the **TBW toolbar**. In the **Commercial Fleet Pink Card** dialog, enter the number of Pink Cards to print, and click **OK**.

To print Pink Cards for a **Schedule**, click one of the recently created Pink Cards in the Desktop Tree, and then click the **Print** button on the **TBW toolbar.** The **Pink Cards** dialog will open, listing all related Pink Cards. Select one or more Pink Cards to print, and click **OK** (see Figure 2.3).

(Figure 2.3)
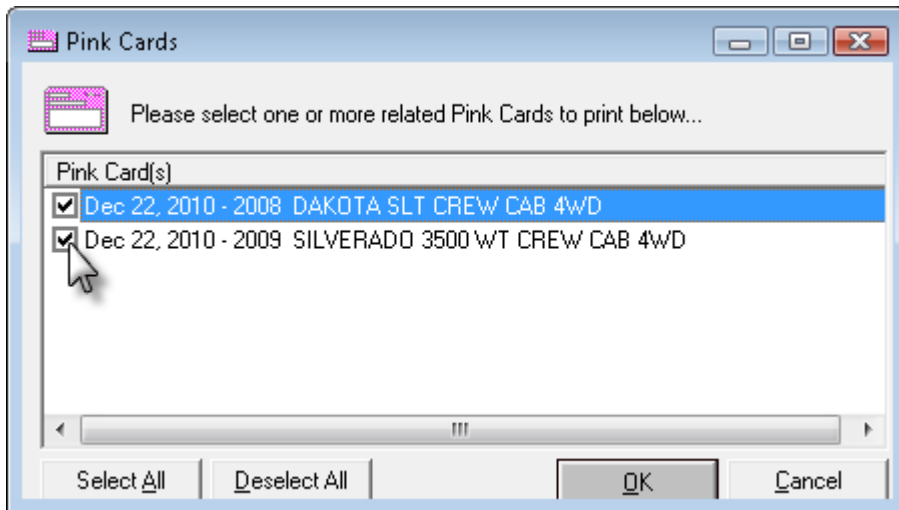
3. New Auto Application for Brokers in Nova Scotia

The Nova Scotia Application for Automobile Insurance form has been updated for applications with a Calculation Date on or after April 1, 2012.

To create an Auto Application, drag and drop the **Application** icon from the **Insurance Tray** onto the completed Client IntelliQuote in the **Desktop Tree**. Enter application details as requested with the help of the Application Wizard. The completed application will appear in the Client folder in the Desktop Tree and display in the Document Window (see Figure 3.1).

(Figure 3.1)
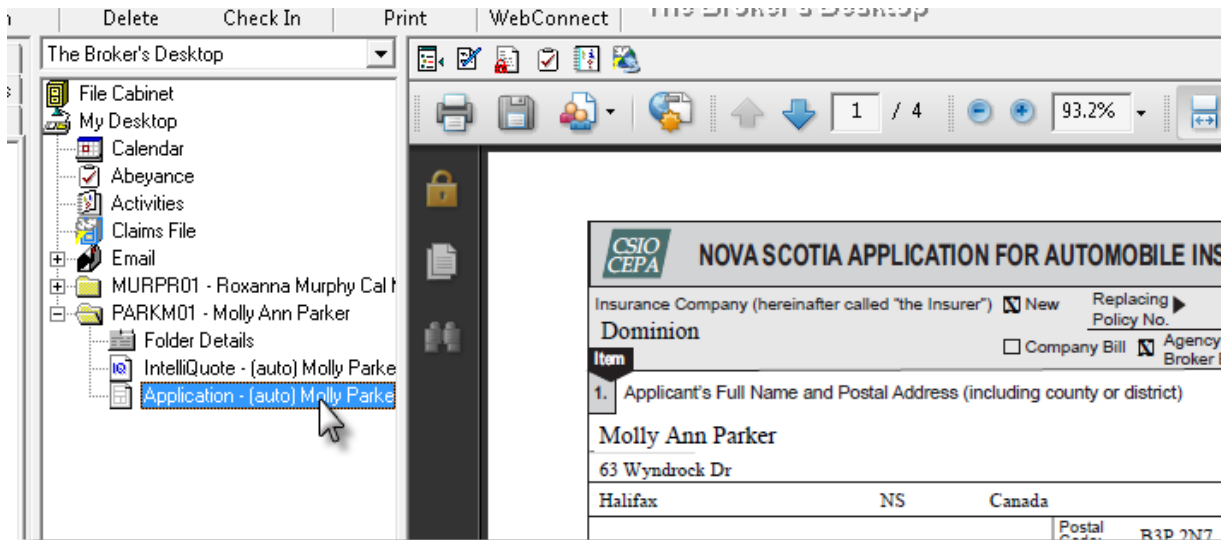
Note that applications with a Calculation Date prior to April 1, 2012, will continue to use the previous version of the application form.

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4. Manitoba Sales Tax displayed in Applications

The recent Manitoba provincial budget provides for the application of Provincial Sales Tax (PST) to certain insurance products effective July 15, 2012. Details of the tax and its administration can be found at the following link: http://www.gov.mb.ca/finance/taxation/bulletins/061.pdf.

The Broker's Workstation is already equipped to handle Manitoba PST tax collection and compliance. To assist Manitoba brokers with managing the application of PST, relevant Sales Tax can now be applied while creating applications and will display in the completed applications.

To create a new Application, drag and drop the **Application** icon from the **Insurance Tray** onto the client's IntelliQuote in the **Desktop Tree**. Enter Application details with the help of the Application Wizard. In the **Billing Details** step of the Wizard, enter the Sales Tax amount in the **Sales Tax** field, as applicable (see Figure 4.1).

- Note that any Sales Tax will be included in the **Total Estimated Cost** field.

(Figure 4.1)

Once the Application Wizard has been completed, the new application will display in the Document Window. The Sales Tax amount entered while creating the application will display in the **Premium Information** area (see Figure 4.2).

(Figure 4.2)

If you have any questions about Manitoba PST and insurance contracts, please contact the **Manitoba Finance Taxation Division** at 1-800-782-0318 (toll-free telephone) or MBTax@gov.mb.ca (email).

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 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.

Microsoft Partner

Gold Independent Software Vendor (ISV)