



18 October 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*

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1. [Modifications to the Wawanesa Application and Payment Slip](#) – A number of enhancements have been made to the Wawanesa Application and Payment Slip for the MAC billing method.

## **1. Modifications to the Wawanesa Application and Payment Slip**

A number of enhancements have been made to the Wawanesa Application and Payment Slip for the MAC billing method. To view these modifications, create an Application for Wawanesa in the usual manner, by dragging and dropping the Application icon from the Insurance Tray onto the client's IntelliQuote in the Desktop Tree. Enter requested details with the help of the Application Wizard, noting the following changes:

- In the **Billing Details** step, when **MAC** is selected as the **Billing Method**, the **Payment Plan**, **Amount Paid Now**, and **Payment Type** fields are disabled. As well, Payment Plan is automatically set to **Monthly** and Amount Paid Now is set to **0** (see Figure 1.1).

(Figure 1.1)

Once details have been entered in the Application Wizard, click **Finish**. The updated **Attention** dialog will display, reminding the user to obtain a signed authorization and void blank cheque (see Figure 1.2). Click **Yes** to carry on with the application process, or click **No** to return to the Billing Details step in the Application Wizard and enter additional details, as required.

(Figure 1.2)

Once the Application has been marked for upload, the **Payment Slip** will display in PDF format in the Desktop Tree, along with the new Application. Double-click the Payment Slip to view it in the Document Window.

- Note that the Payment Slip is now referred to as the “**Application Reference**,” and displays a reminder to include this form with the signed authorization form and void cheque.

[Return to Contents](#)

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](mailto: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.



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