

9 September 2013

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. [Golf Cart Liability added automatically to Habitational and Farm Policies for Wawanesa \(Manitoba and Saskatchewan\)](#) – Every Wawanesa habitational or farm policy effective June 1, 2013 or later requires the addition of Golf Cart Liability coverage, and this coverage will now be added automatically as applicable to new business policies and to change requests for existing policies.

1. Golf Cart Liability added automatically to Wawanesa Habitational and Farm Policies (Manitoba and Saskatchewan)

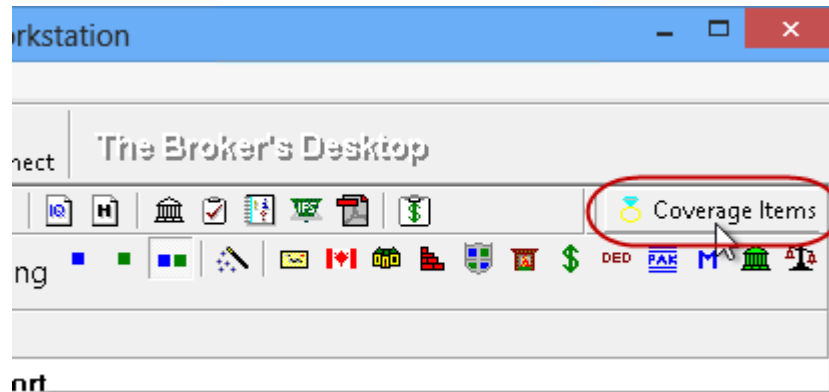
Effective June 1, 2013 or later, every Wawanesa habitational or farm policy with Liability coverage requires the addition of Golf Cart Liability, and this coverage will now be added automatically as applicable when you create a new business policy or a change request for an existing policy. Wawanesa will continue to add Golf Cart Liability automatically at renewal time to all applicable downloads.

Golf Cart Liability in IntelliQuotes

When a new IntelliQuote is created, Golf Cart Liability will be added automatically as applicable.

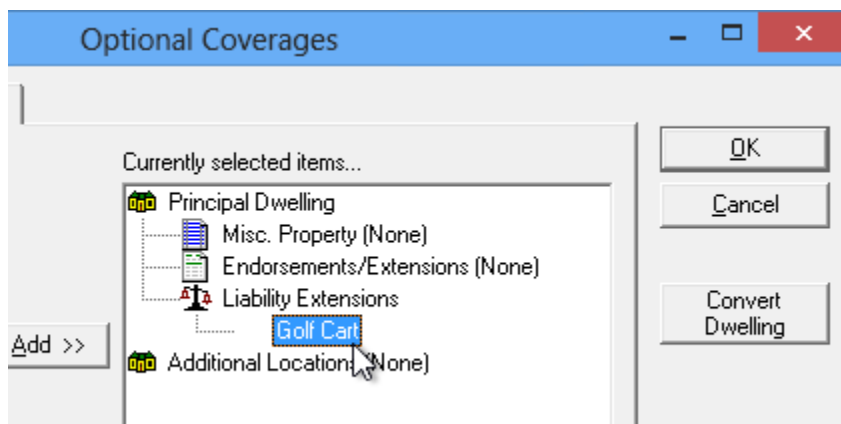
Once the IntelliQuote has been created, click the **Coverage Items** button on the IQ toolbar to view or make any changes to coverage details for Golf Cart Liability (see Figure 1.1).

(Figure 1.1)



Double-click **Golf Cart** in the Optional Coverages window (see Figure 1.2) to open the Coverage Item Properties dialog. Make changes as required for this coverage item.

(Figure 1.2)



Golf Cart Liability in Change Requests

Golf Cart Liability will also be added automatically as applicable when a change request for an existing policy with Wawanesa is created.

To modify details for Golf Cart Liability when creating a change request for an existing policy with Wawanesa, create the change request in the usual manner. In the **Request** dialog, click the **Coverages** button (see Figure 1.3).

(Figure 1.3)

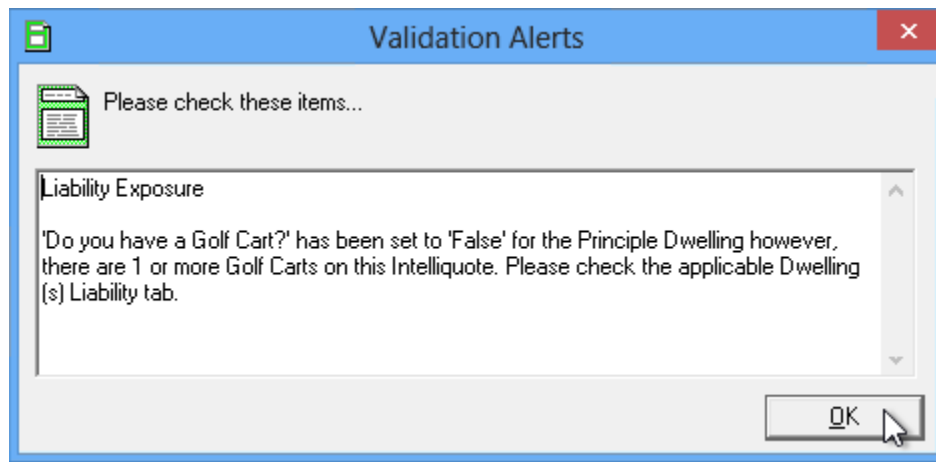
Make additional changes as required and, when the **Optional Coverages** window displays, double-click **Golf Cart** (see Figure 1.2) to open the Coverage Item Properties dialog. Make changes as required with the help of the Wizard, and complete the change request in the usual manner.

Golf Cart Liability in Applications

To create an Application for Wawanesa, drag and drop the **Application** icon from the **Insurance Tray** onto the IntelliQuote in the Desktop Tree.

If the Golf Cart Liability setting in the IntelliQuote is set to 'No,' the following **Validation Alert** will display as a reminder to adjust this setting if the Insured does actually own a golf cart (see Figure 1.4).

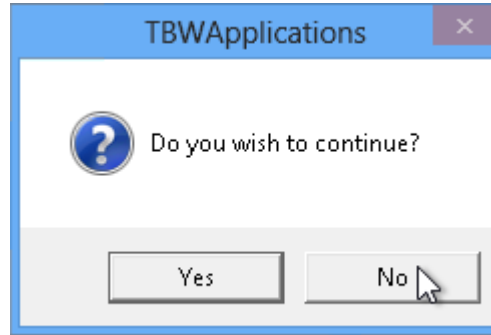
(Figure 1.4)



Click **OK** in the Validation Alerts dialog, and the **TBWApplications** window will appear (see Figure 1.5). In this window, click **Yes** to continue creating the Application, or click **No** to return to the IntelliQuote and adjust the Golf Cart setting.

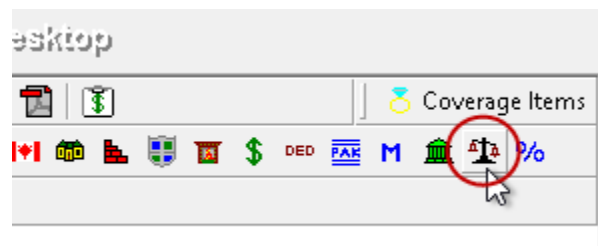
- If the Insured does have a golf cart, select **No** in this dialog to return to the IQ and change the Golf Cart setting to 'Yes.' If the Insured does not own a golf cart, select **Yes** to proceed with the Application.

(Figure 1.5)



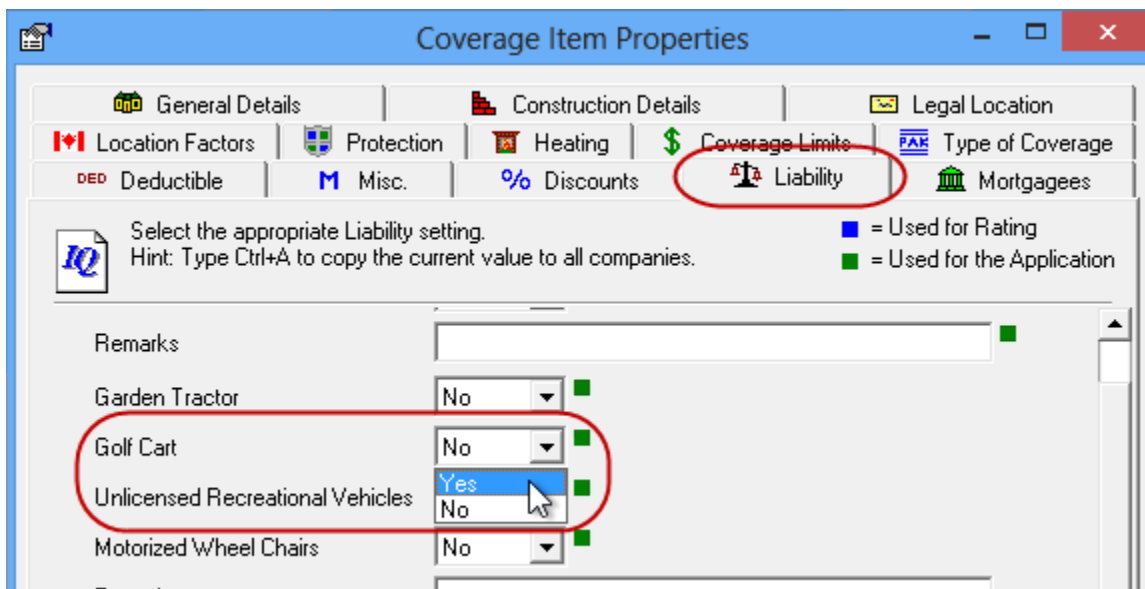
If **No** was selected in the TBWApplications window, click the **Liability** button on the **IQ toolbar** (see Figure 1.6).

(Figure 1.6)



On the **Liability** tab in the **Coverage Item Properties** dialog, select **Yes** in the **Golf Cart** drop-down menu (see Figure 1.7), and click **OK**.

(Figure 1.7)



Once this setting has been adjusted, recalculate the IQ, and then proceed to create the Application in the usual manner.

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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 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)