



2 January 2014

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. [Folder Details Report](#) – Generate a Folder Details Report to view a listing of all or target clients, groups, or brokers, as well as applicable folder details, including Client ID, Address, Classification, Current Status, Producer/Underwriter, and more.
2. [New Auto Application for Brokers in Ontario](#) – The new Ontario Application for Automobile Insurance form is available for applications with a Calculation Date on or after January 1, 2014.
3. [Email a Declaration Page directly from TUW](#) – TUW users can now email a Declaration page directly from TUW by dragging and dropping the Email icon onto a Policy in the Desktop Tree.

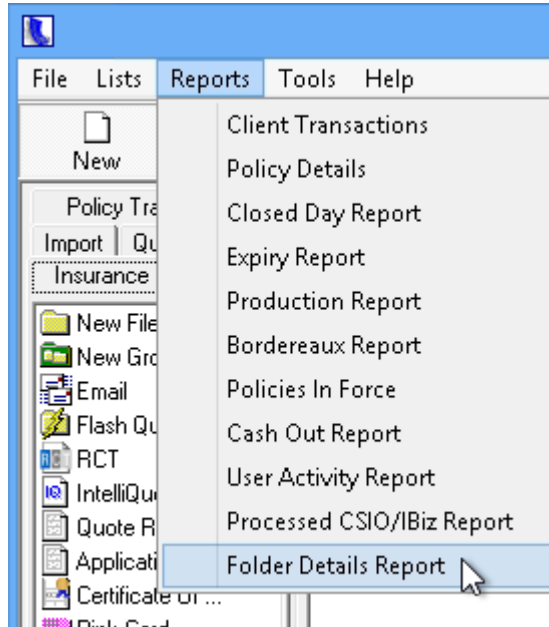
1. Folder Details Report

We are pleased to announce a new addition to TBW/TUW Reports. The new Folder Details Report allows the user to generate a report listing all or target clients, groups, or brokers, as well as

applicable folder details, including Client ID, Address, Current Status, Classification, Producer/Underwriter, and more. This report, which can be printed or exported to Microsoft Excel, if required, may be particularly useful for the purpose of marketing / cross-selling of new business.

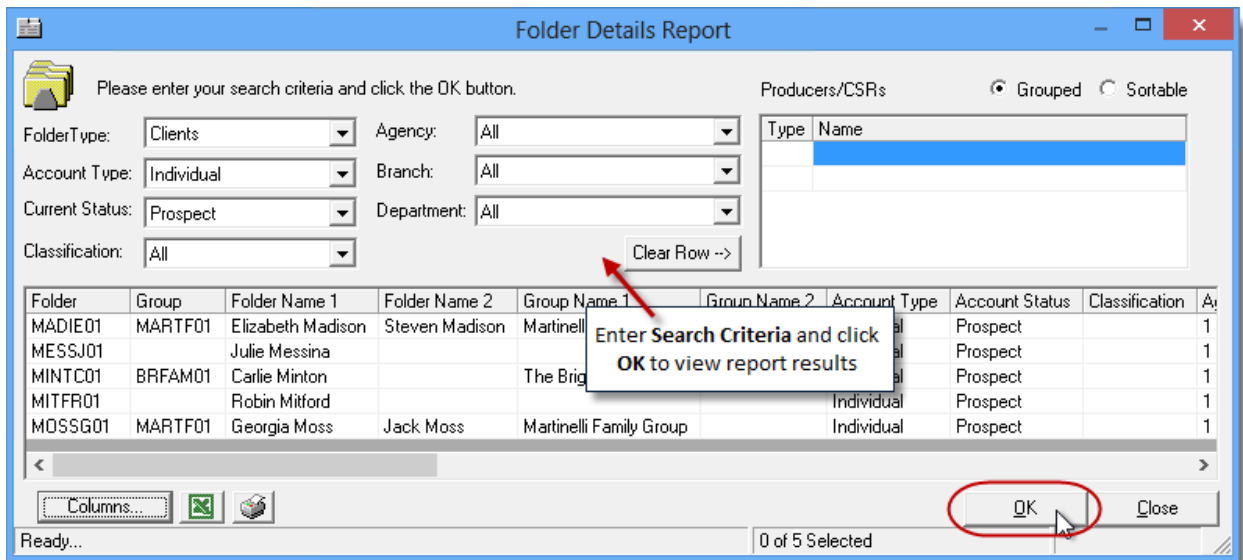
To create a Folder Details Report, click **Reports, Folder Details Report** in the TBW/TUW window (see Figure 1.1).

(Figure 1.1)



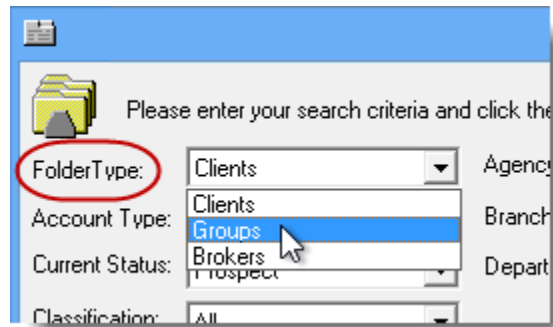
In the **Folder Details Report** dialog, enter report search criteria, and click **OK** (see Figure 1.2). Report results will display in the report window.

(Figure 1.2)



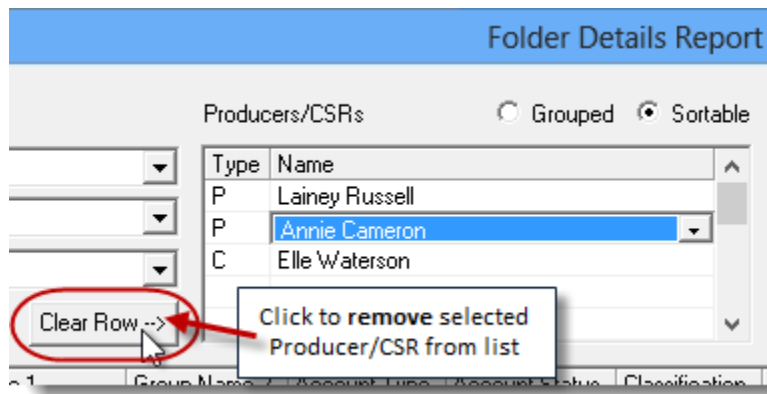
- Note the report can be generated based on Client, Group, or Broker **Folder Types** (see Figure 1.3).

(Figure 1.3)



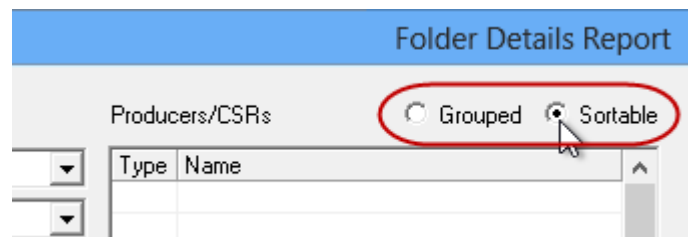
- When one or more Producers and/or CSRs have been selected as search criteria, the **Clear Row** button can be used to remove a selected item from the **Producers/CSRs** box, if necessary (see Figure 1.4).

(Figure 1.4)



- Producers/CSRs can be displayed as **'Grouped'** or **'Sortable'** in the report results (see Figure 1.5).
 - In **Grouped** view, the folder's Producers/CSRs are listed in the same row in the report results.
 - In **Sortable** view, each Producer/CSR on the folder is displayed in a separate row, allowing report results to be sorted by the Producers or CSRs column, if necessary. Note that this view typically results in more rows in the report output.

(Figure 1.5)



- When searching for clients and **Grouped** view is selected, one row will display for each Group Folder associated with the client (as applicable), with applicable Producers/CSRs also listed in that row (see Figure 1.6).

(Figure 1.6)

Folder	Group	Folder Name 1	Folder Name 2	Group Name 1	Producers	CSRS	Ad
MADIE01		Elizabeth Madison	Steven Madison		CE		2 E
MESSJ01	MARTF01	Julie Messina		Martinelli Family Group	RC	EW	19
MINTC01	BRFAM01	Carlie Minton		The Bright Family	CE		40
MITFR01		Robin Mitford			PC, RC	LC	2 J
MOSSG01	BRFAM01	Georgia Moss	Jack Moss	The Bright Family	GG	PG	17
MOSSG01	MARTF01	Georgia Moss	Jack Moss	Martinelli Family Group	GG	PG	17

Grouped view displays one row for each Group Folder the client belongs to, with Producers/CSRs in the same row

- In **Sortable** view, each Group Folder/Producer combination for the client will be displayed in a separate row (see Figure 1.7).

(Figure 1.7)

Folder	Group	Folder Name 1	Folder Name 2	Group Name 1	Producers	CSRS	Ad
MADIE01		Elizabeth Madison	Steven Madison		CE		2 E
MESSJ01	MARTF01	Julie Messina		Martinelli Family Group	RC		19
MESSJ01	MARTF01	Julie Messina		Martinelli Family Group		EW	19
MINTC01	BRFAM01	Carlie Minton		The Bright Family	CE		40
MITFR01		Robin Mitford			RC		2 J
MITFR01		Robin Mitford			PC		2 J
MITFR01		Robin Mitford				LC	2 J
MOSSG01	BRFAM01	Georgia Moss	Jack Moss	The Bright Family		PG	17
MOSSG01	BRFAM01	Georgia Moss	Jack Moss	The Bright Family	GG		17
MOSSG01	MARTF01	Georgia Moss	Jack Moss	Martinelli Family Group		PG	17
MOSSG01	MARTF01	Georgia Moss	Jack Moss	Martinelli Family Group	GG		17

Sortable view displays a separate row for each Group Folder/Producer combination for the Client folder

- When the **Groups Folder Type** is selected, the **Grouped** view displays one row for each Client folder associated with the Folder Group, with Producers and CSRs in the same row, as well (see Figure 1.8).

(Figure 1.8)

With **Groups Folder Type** and **Grouped** view, one row displays for each Client Folder in the Folder Group, with Producers/CSRs in the same row

Group	Folder	Group Name 1	Group Name 2	Folder Name 1	Producers	CSRS
LUTHF01	HOUSJ01	Luther Family Group		Luther Family Group	AC, PC	EW
LUTHF01	KNOWT01	Luther Family Group		Teddy Knowles	AC, PC	EW
LUTHF01	LUTHB01	Luther Family Group		Bennet Luther	AC, PC	EW
LUTHF01	LUTHB01	Luther Family Group		Carrie Luther	AC, PC	EW



- For the **Groups Folder Type**, select the **Sortable** view to list each Client Folder/Producer combination for the Folder Group in a separate row (see Figure 1.9).

(Figure 1.9)

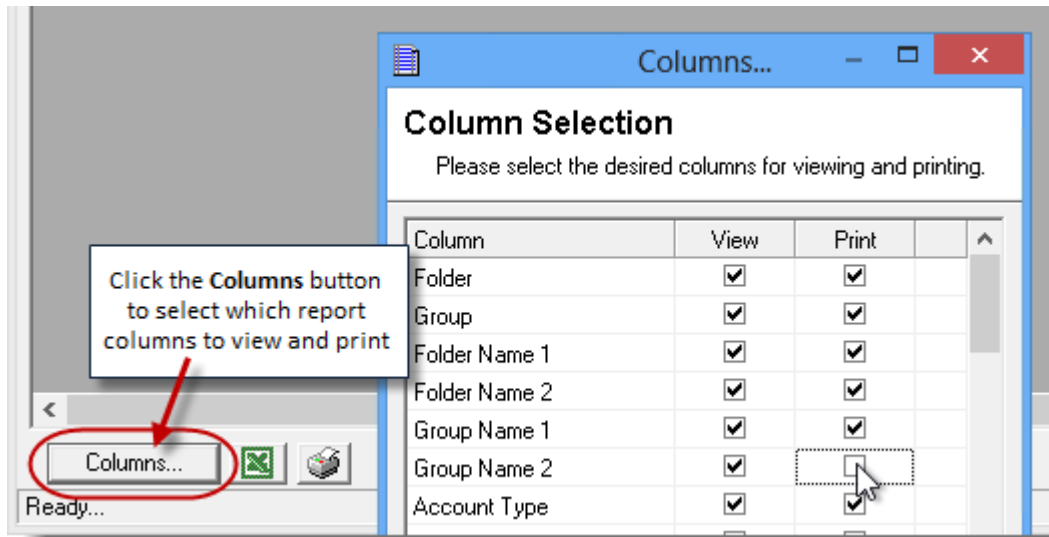
With **Groups Folder Type** and **Sortable** view, a separate row displays for each Client Folder/Producer combination for the Folder Group

Group	Folder	Group Name 1	Group Name 2	Folder Name 1	Producers	CSRS
LUTHF01	HOUSJ01	Luther Family Group		Luther Family Group	PC	
LUTHF01	HOUSJ01	Luther Family Group		Luther Family Group	AC	
LUTHF01	HOUSJ01	Luther Family Group		Luther Family Group		EW
LUTHF01	KNOWT01	Luther Family Group		Teddy Knowles	PC	
LUTHF01	KNOWT01	Luther Family Group		Teddy Knowles	AC	
LUTHF01	KNOWT01	Luther Family Group		Teddy Knowles		EW
LUTHF01	LUTHB01	Luther Family Group		Bennet Luther		EW
LUTHF01	LUTHB01	Luther Family Group		Bennet Luther	AC	
LUTHF01	LUTHB01	Luther Family Group		Bennet Luther	PC	

- Click a column heading to sort report results by that category; click the column heading again to sort the report in reverse order.

- Click the **Print**  button to print report results. To export report results to Microsoft Excel for additional use or analysis, click the **Export to Excel**  button.
- To select which columns to view in the report and which to print when report results are printed, click the **Columns** button to open the **Column Selection** window (see Figure 1.10).

(Figure 1.10)



Please note that the Folder Details Report is controlled by **User Rights** (through Tools, Administrative, User Manager, Rights in the TBW/TUW window).

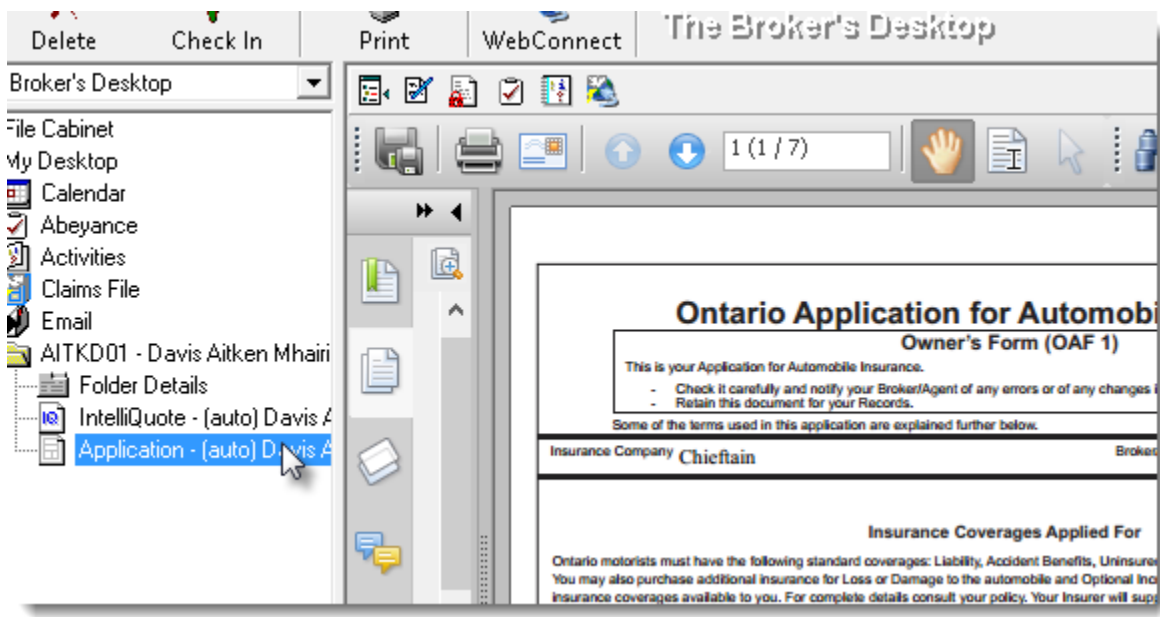
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2. New Auto Application for Brokers in Ontario

The Ontario Application for Automobile Insurance form has been updated for applications with a Calculation Date on or after January 1, 2014. Changes to the application include the addition of Business Use %, allowing for 6 (rather than 4) claims and convictions, and allowing for 4 (rather than 3) endorsements.

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 2.1).

(Figure 2.1)



Please note that applications with a Calculation Date prior to January 1, 2014, will continue to use the previous version of the application form.

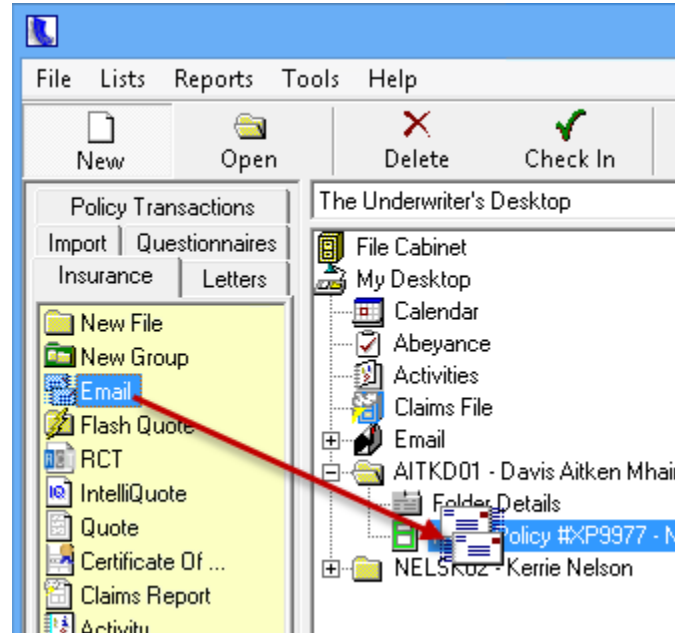
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3. Email a Declaration Page directly from TUW

With this program enhancement, TUW users can now email a Declaration page directly from the TUW window.

To email a Declaration page from TUW, first ensure that the applicable Client folder and green Policy document are checked out of the File Cabinet. Then, drag and drop the **Email** icon from the Tray onto the Policy document in the Desktop Tree (see Figure 3.1).

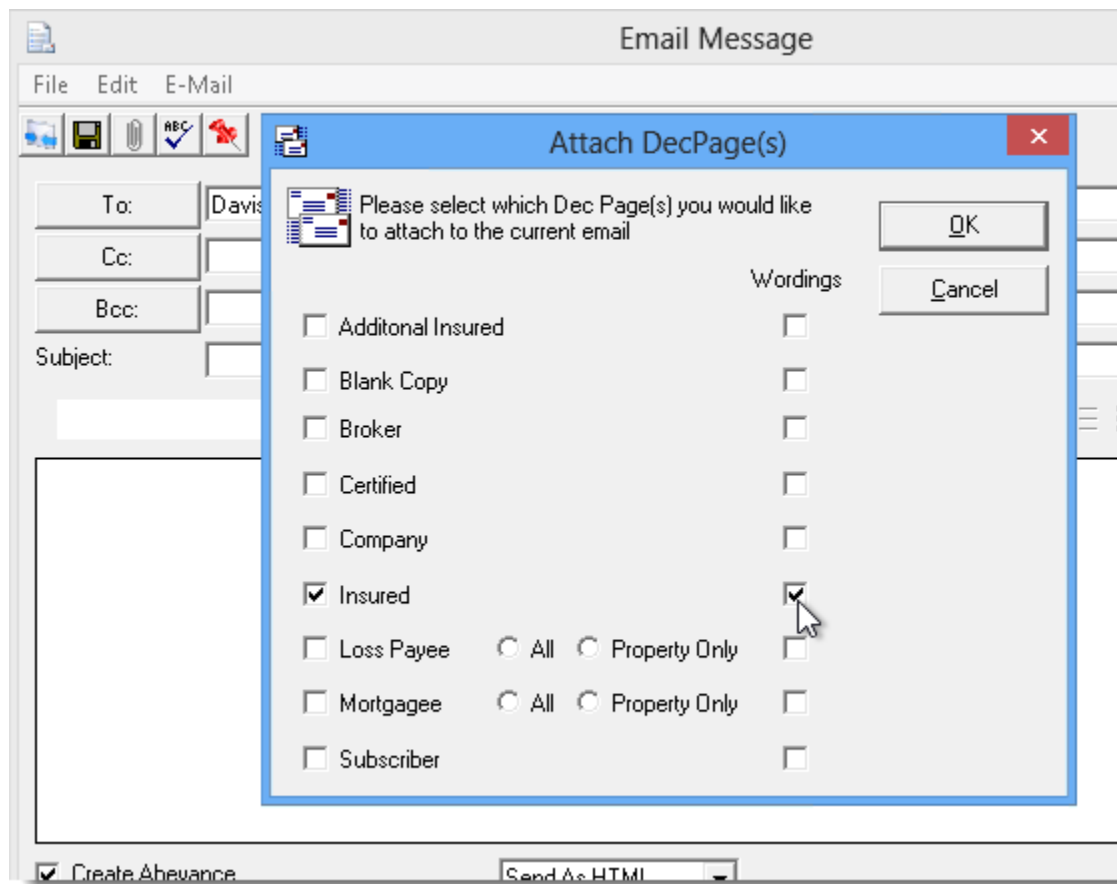
(Figure 3.1)




An **Email Message** will open, along with an **Attach DecPage(s)** dialog. In the Attach DecPage(s) dialog,

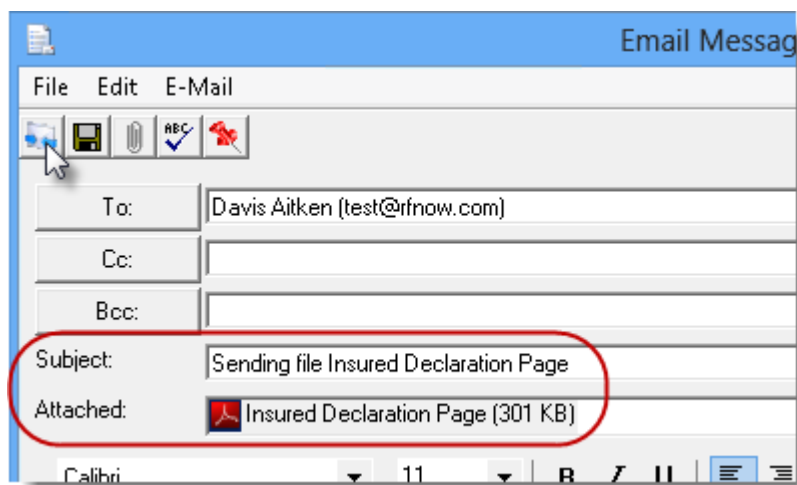
- a. Click in the corresponding checkbox(es) to select the **Dec Page(s)** to attach to the email.
- b. To include the **Wordings** with the Dec page(s), select the corresponding Wordings checkbox(es) to the right of the selected Dec Page(s) (see Figure 3.2).
- c. Click **OK**.

(Figure 3.2)



The selected Dec Page(s) will be attached to the email message, and the **Subject** of the email will be filled automatically, saying 'Sending file <Copy> Declaration Page' (see Figure 3.3) (note that the Subject can be adjusted, if required). Complete the email message in the usual manner, and then click the **Send**  button to send the message.

(Figure 3.3)



If this enhancement is of interest to your organization, please contact Client Services to have it enabled.

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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)