27 November 2015

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. Upgraded RCT Express® and RCT High Value™ from CoreLogic® Now Available to All Users - CSSI is pleased to announce that the upgraded, web-enabled RCT Express platform, including RCT High Value, is now available to all TBW users.

2. TBW Now Offers Trillium New Business Upload – We are pleased to announce that The Broker's Workstation now offers Trillium New Business Upload for habitational policies.

3. TBW/TUW Help File Update – The TBW/TUW Help File has been updated with additional topics and information. If you have any Terminal Users in your organization, please follow the provided steps to confirm they have received this recent Help File update.

4. Online Interactive Training for TBW – Live online interactive training sessions are offered each month by our professional trainers. All TBW users, whether new or experienced, are welcome to participate in these training sessions.

1. Upgraded RCT Express® and RCT High Value™ from CoreLogic® Now Available to All Users

CSSI is pleased to announce that the upgraded, web-enabled RCT Express platform, including RCT High Value, is now available to all TBW users.

The upgraded RCT Express and RCT High Value provide the TBW user with enhanced workflow, ease of use, and up-to-date Canadian reconstruction cost data. With RCT Express, the TBW user simply completes the Mandatory Details screen to create a new RCT™ estimate quickly and easily. The TBW user will only need to validate the information with the homeowner and make any necessary changes. Additional property details can be added immediately or at a later time, if required.

RCT High Value functionality is included and can be used to calculate reconstruction costs for high-value, single-family homes. This new feature will eliminate the need for a Broker to run additional high value calculators outside of TBW.

A TBW/TUW user will be transitioned to the upgraded RCT Express platform and RCT High Value feature when they run the update utility after January 15, 2016. If you are interested in having the upgraded platform available to your organization prior to January 15, please contact Client Services to have this enhanced feature set up in your office.

2. TBW Now Offers Trillium New Business Upload

We are pleased to announce that The Broker's Workstation now offers Trillium New Business Upload!

CSSI's *The Broker's Workstation* and *IntelliQuote* are now connected with Trillium Mutual Insurance Company's new business upload web service. This integration allows brokers to upload Personal Lines Property new business policies in the various regions where Trillium conducts business. This integration allows for improved efficiencies company-wide and for Trillium to optimize their partnerships with independent insurance brokers.

A one-time setup must be completed in TBW for the Trillium New Business Application Upload feature before the functionality can be used. Then, once you have completed a Personal Lines Property new business application for Trillium, right-click the application document in the **Desktop Tree** in the TBW window, and select **Upload to Trillium** (see Figure 2.1)**.**

(Figure 2.1)
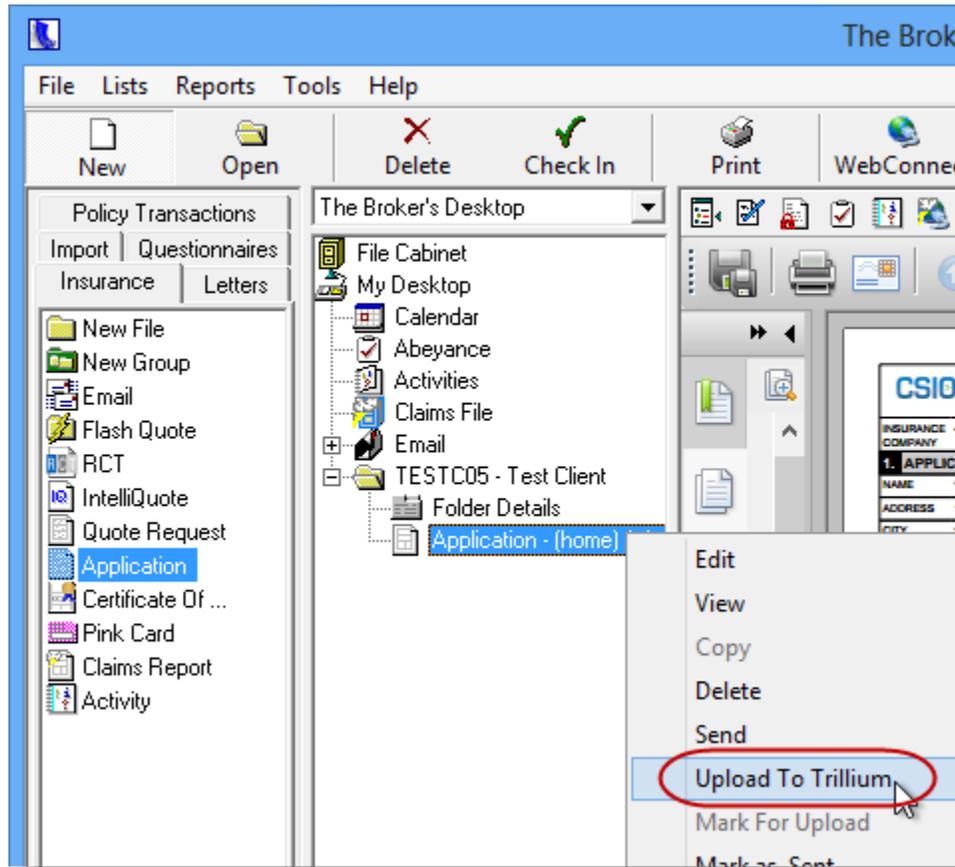
TBW will then launch a web browser window that will take you to the application page on the Trillium website. Verify the details of the application, adding additional information if required. Trillium will issue the policy from the information provided.

Please contact our Client Services Team at clientservices@cssionline.com (email) or 1-888-291-3588 (toll-free telephone) with any questions you have about the setup for this feature. For any questions regarding the feature itself, please contact your Trillium Personal Lines representative for assistance.

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3. TBW/TUW Help File Update

The TBW/TUW inbuilt Help File has recently been updated with additional topics and information. To access the Help File in the TBW/TUW window, click **Help**, **Contents** (see Figure 3.1).

(Figure 3.1)
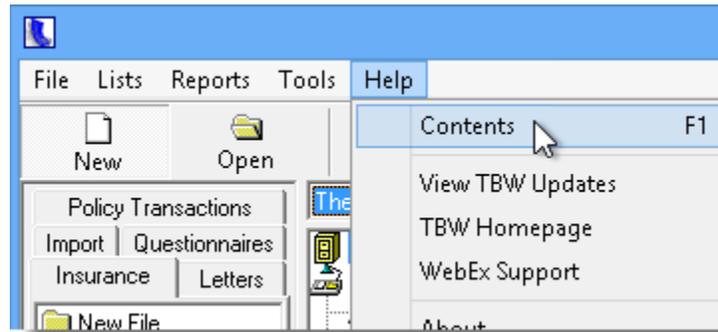
The Help feature will open in its own window, which can be moved, resized, etc., as with any window. Once opened, the Help window can be minimized or moved to the side as necessary while you complete various TBW/TUW or other tasks.

If you have any Terminal Users in your organization, please ensure they have received this recent update to the Help file. To confirm each Terminal User has the current version of the Help File, please follow these steps:

1. On the Terminal User's machine, click **Help**, **Contents** in the TBW/TUW window to open the Help file.
2. On the **Contents** tab in the Help file, locate the **EFT Active Plan Summary Report** item in the **Reports** section under **Help and How-to's** (see Figure 3.2).
   - The EFT Active Plan Summary Report topic is one of the items added to the Help file in the most recent update.

(Figure 3.2)
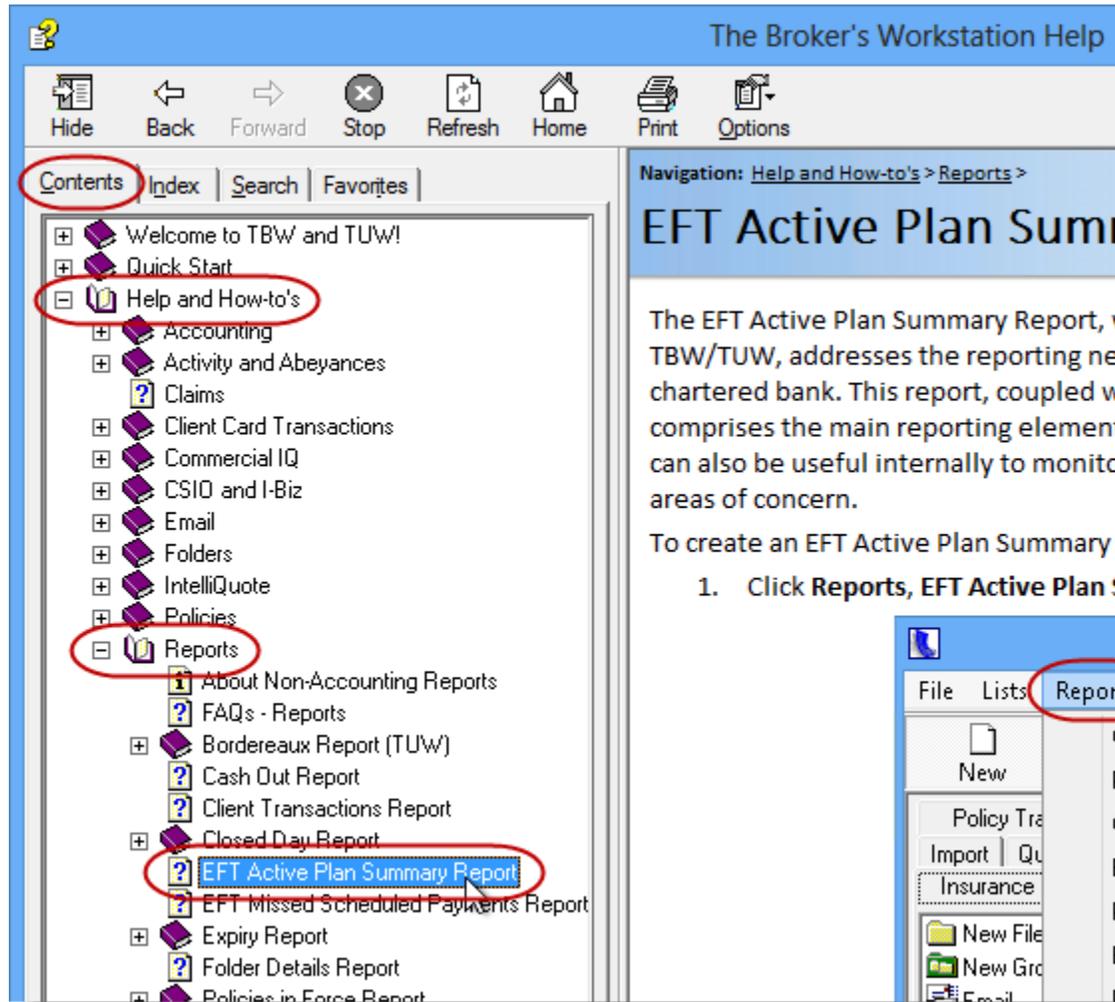
3. If the EFT Active Plan Summary Report page displays in the Reports menu, the user does have the most recent update for the TBW/TUW Help file. **If, however, the EFT Active Plan Summary Report page does not display in the Reports menu, the user does not have the recent Help file update. In this case, please have your IT Department contact Client Services for assistance with updating the information in the user's script file.**

Updating the TBW/TUW Help File is an ongoing project, and not all topics in the Help File have been completed. If you need assistance with a topic not yet found in the Help File, please contact Client Services.

4. Online Interactive Training for TBW

Each month, CSSI offers online training for The Broker's Workstation. These live, interactive, hands-on training sessions are offered over the Internet by our professional trainers. All TBW users,

whether new or experienced, are welcome to participate in these training sessions. Training participants require only a telephone and a computer with a high-speed Internet connection to take part in the training.

Current training modules include the following:

- **Get Started with The Broker's Workstation:** Whether you are a first-time user of TBW or an experienced user wanting a fresh look at the program, this module will prepare you to use TBW to complete your daily tasks with confidence.

- **Get Working with Personal Lines Insurance using TBW:** Targeted at both new and experienced users of *The Broker's Workstation*, this training module will show you how to use the program effectively and efficiently for personal lines habitational insurance.

- **Get Working with Auto Insurance using TBW:** Customized for our clients in provinces with private auto, this class will lead you through rating and writing auto insurance with *The Broker's Workstation*. Whether you are a brand-new user or are already familiar with TBW, join us for this session to see how the program can help you manage the auto insurance process successfully and productively.

- **Policy Entry – An Accounting Perspective of The Broker's Desktop** – This course provides an overview of the client ledger card, policy transaction types, and policy billing types. We will discuss the specific GL postings of the policy transactions and how to correct entry errors. This course is designed for staff who perform Accounting support in the brokerage.

- **Basic Accounting Transactions (Part 1): The Accountant's Desktop –** This course covers the basic accounting transactions found on The Accountant's Desktop in TBW. Class participants will be shown how to perform deposits, cheques, journal entries, AR/AP reconciliations, bank reconciliations, and the month-end/year-end close procedure. This course is designed for staff who perform Accounting support in the brokerage.

- **Basic Accounting Transactions (Part 2): The Broker's Desktop –** This course covers the basic accounting transactions found on The Broker's Desktop in TBW. Class participants will be shown how to record client receipts, NSF payments, client refunds, client ledger card reconciliations, service charges, and small balance and bad debt write-offs. This course is designed for front-end staff and those who perform Accounting support in the brokerage.

- **Basic Accounting Transactions (Part 3): Reporting –** This course covers a variety of accounting reports available in TBW. Class participants will be shown how to run the balance sheet and statement of earnings and perform General Ledger inquiries. Other reports covered are the Cash Status Report; the Closed Day Report; AR reports, statements, and invoices; AP reports and statements; and the Production Report.

The schedule for upcoming training sessions can be found on our website here: http://cssionline.com/training-support/

To register yourself and/or other TBW users for an upcoming training session, or with any questions you have regarding our broker training, please contact us at training@cssionline.com (email) or 1-888-291-3588 (toll-free telephone).

CE credits are available for these training sessions in applicable provinces. Please contact us for more information.

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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 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)

To unsubscribe from our email notifications and updates, please contact us at info@cssionline.com or reply to this email.