



21 September 2017

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)**:

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1. [Recent Issue with Creating an IQ from an RCT has been Resolved](#) – Recently, certain users experienced a file corruption and received an error message when a habitational IQ was created. Now, this issue has been resolved, and, for those users who have been using the temporary workaround, you can proceed to create an IQ in the usual manner.
2. [Attention Alert Opens Automatically when Folder Checked Out from Abeyance Window](#) – When a Client folder is checked out from the main Abeyance window, any Attention Alert for that folder will immediately display.
3. [Policies and Claims in Folder View listed in Chronological Order](#) – The Policies and Claims lists in Folder View will now be sorted in chronological order by Effective Date.
4. [Additional Contact Details in Vendors List](#) – Additional contact details are now displayed in the Vendors List dialog and included when the list is exported to Microsoft Excel.
5. [Improved Flat Coverage Endorsement Transaction \(TUW\)](#) – For our TUW users, the Flat Coverage Endorsement transaction has been enhanced with additional functionality.

1. Recent Issue with Creating an IQ from an RCT has been Resolved

Recently, certain users experienced a file corruption and received an error message regarding the primary dwelling's heating system when a habitational IntelliQuote was created by dropping the IQ on an existing RCT. As a temporary workaround, those users were asked by Client Services to create a habitational IQ from a Client folder (rather than an RCT) until this issue was resolved.

Now, this file-corruption issue has been resolved. For those users who have been using the temporary workaround, you can proceed to create a habitational IQ in the usual manner by dropping it on an existing RCT.

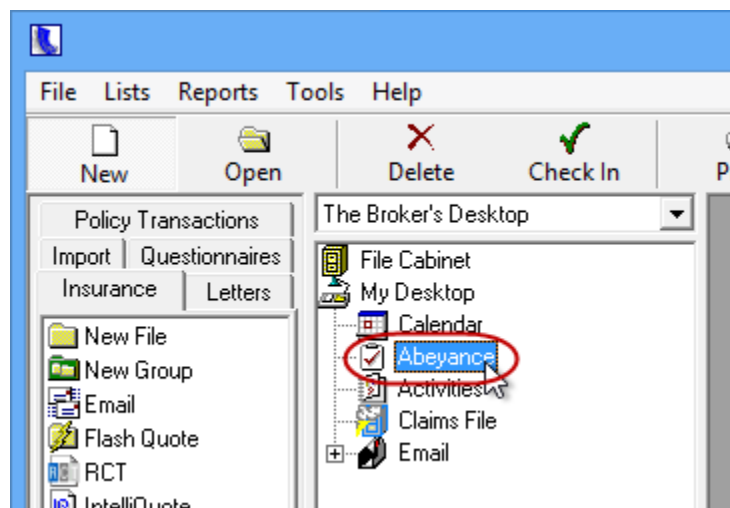
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2. Attention Alert Opens Automatically when Folder Checked Out from Abeyance Window

When you are creating an Abeyance for a Client folder, the **Attention Alert** option is used to indicate this is an essential or urgent task that must be completed for this folder. When a folder with an Attention Alert is checked out from the **Open a File** dialog, the Attention Alert will open and display immediately, allowing the user to view full details of the urgent Abeyance before proceeding with the folder. Now, with this program enhancement, any Attention Alert will immediately display when a folder is checked out from the main Abeyance window, as well.

To view this improved feature, first double-click **Abeyance** in the **Desktop Tree** (see Figure 2.1).

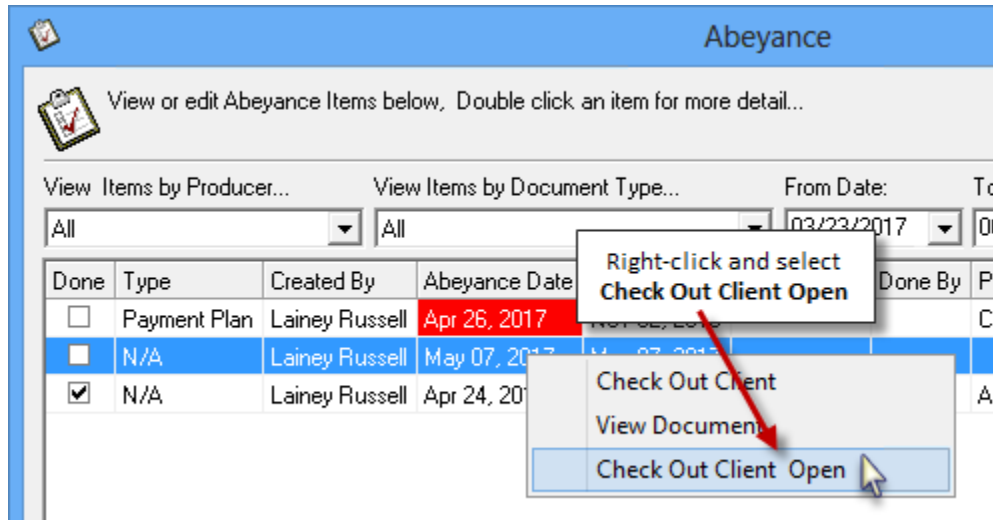
(Figure 2.1)



In the **Abeyance** dialog that displays, adjust filters as needed, and click the **Refresh** button to load the list of target Abeyances. Please note, any urgent Abeyance will display in **green text** in the list. To open a folder associated with one of the urgent Abeyances, right-click the item, and select **Check Out Client Open** in the right-click menu (see Figure 2.2).

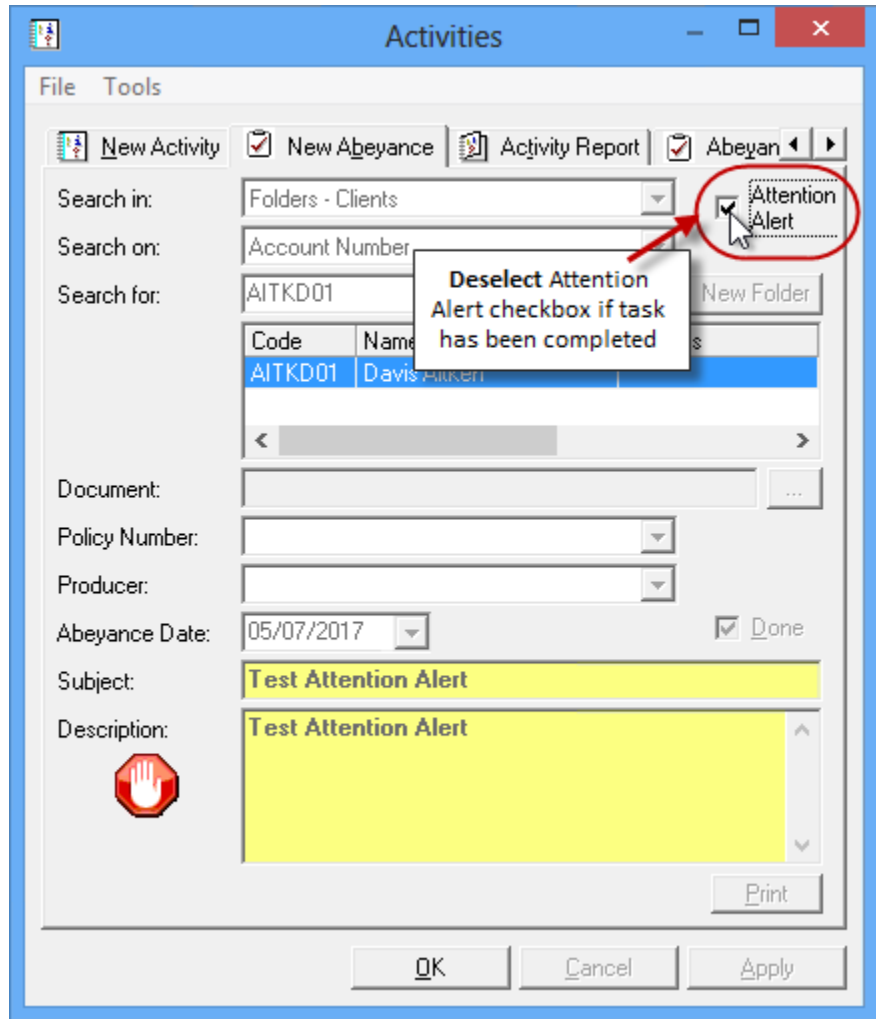
- In the right-click menu, select “Check Out Client Open” to minimize the Abeyance dialog, check out and open the folder, and immediately view details for any Attention Alert. Select “Check Out Client” instead if you would rather check out the target folder but continue working in the Abeyance dialog.

(Figure 2.2)



Details for the Attention Alert will display on the Abeyance tab in the Activities window. Either click **OK** to close the window and continue working on another task in TBW/TUW, or, if the Attention Alert task has been completed, deselect the **Attention Alert** checkbox (see Figure 2.3), select the applicable **Producer** for the Abeyance, and click **OK**.

(Figure 2.3)



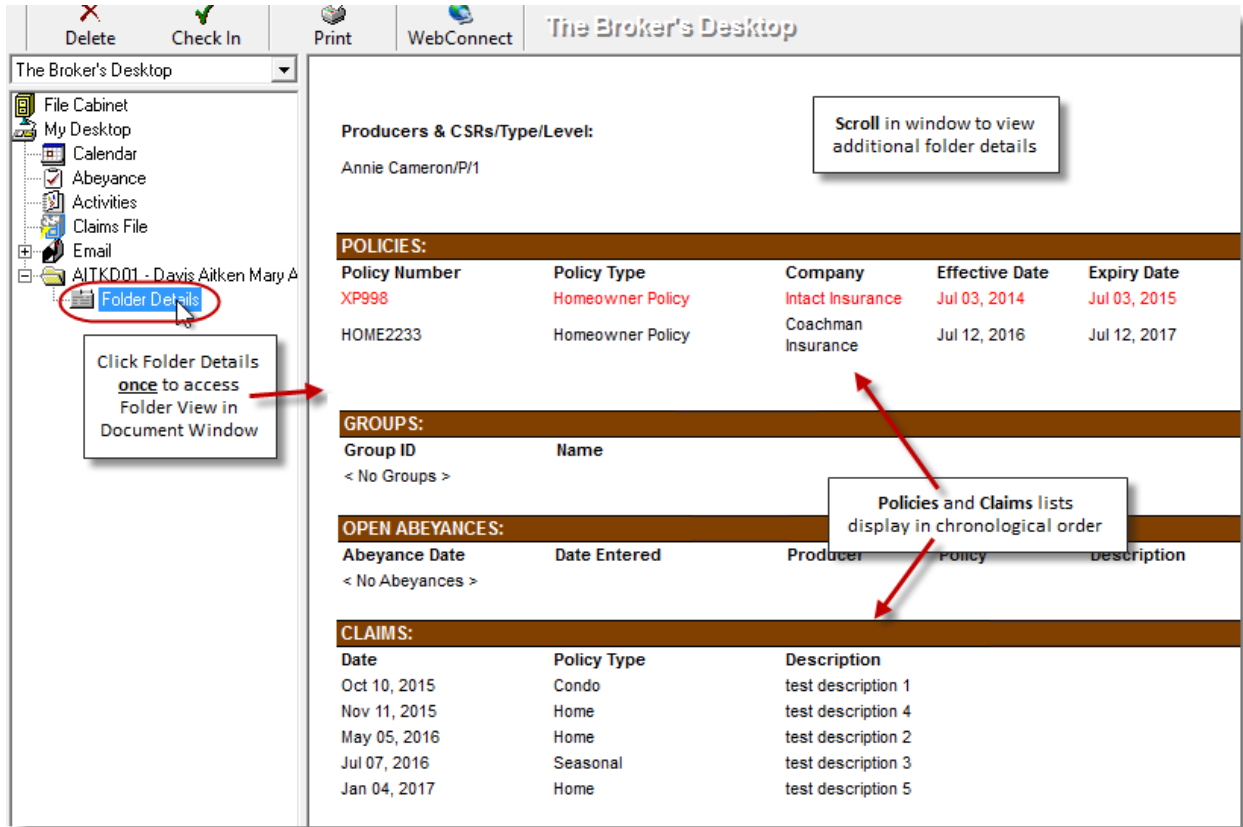
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3. Policies and Claims in Folder View listed in Chronological Order

Folder View displays a summary of important details for a folder, including contact information, policies, claims, and more. Now, Folder View has been improved to display the lists of policies and claims sorted in chronological order by Effective Date.

To access Folder View, click **Folder Details** in the Desktop Tree once to view folder information in the Document Window. Scroll in the window as necessary to view additional details for the folder. Note that the **Policies** and **Claims** lists are now sorted in chronological order (see Figure 3.1).

(Figure 3.1)



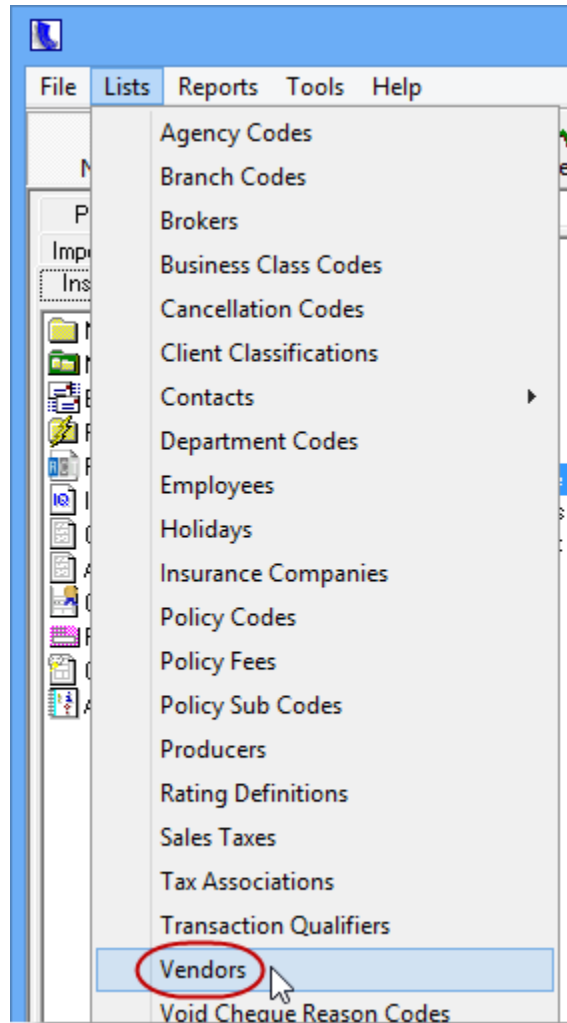
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4. Additional Contact Details in Vendors List

Additional contact details will now display in the Vendors list in the TBW/TUW Lists dialog, and these details will also be included when the Vendors list is exported to Microsoft Excel.

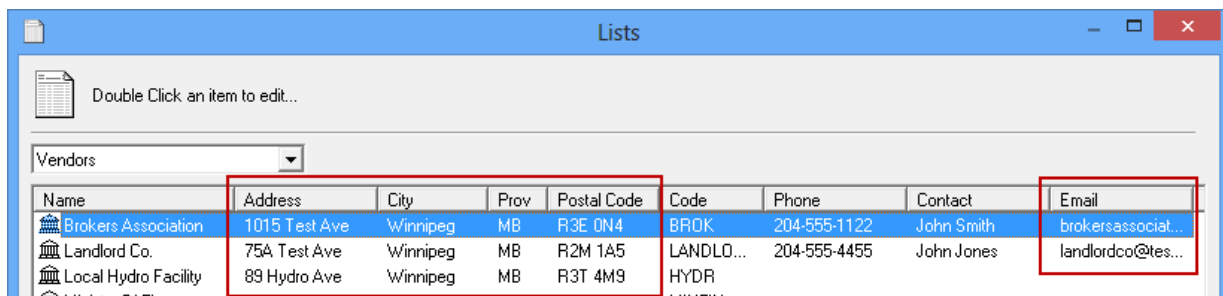
To view the Vendors list, click **Lists** in the TBW/TUW menu bar, and select **Vendors** (see Figure 4.1).


(Figure 4.1)



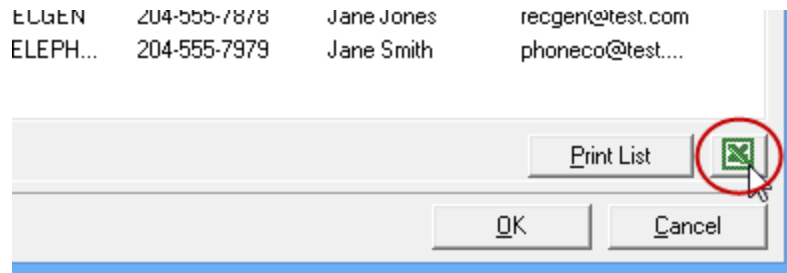
In the **Vendors List** window, note that additional details (including **Address, City, Province, Postal Code, and Email**) now display in the list of Vendors (see Figure 4.2).

(Figure 4.2)



Address details and email addresses will also be included when the Vendors list is exported to Microsoft Excel for additional use and analysis. To export the list to Excel, click the **Export to Excel**  button in the Lists dialog (see Figure 4.3).

(Figure 4.3)



Please note that the ability to export List items to Microsoft Excel is controlled by **User Rights** for **Printing** for the applicable List item (through *Tools, Administrative, User Manager, Rights*).

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5. Improved Flat Coverage Endorsement Transaction (TUW)

The Flat Coverage Endorsement transaction has recently been enhanced with additional functionality. A user can now choose to include the additional Premium they are billing on a Flat Coverage Endorsement in the policy Renewal. The Optional Coverages screen has been made accessible, providing the ability to add additional Rating Definition(s) and/or Coverages. From Optional Coverages, a user can edit any of the IntelliQuote Coverage Details fields.

To complete a Flat Coverage Endorsement, drag and drop a Yellow Endorsement onto the latest Green Policy. The **Address Validation** screen pops up; change the Insureds Folder Details, if applicable, and click **OK**.

On the **Endorsement Request** screen, select **Flat-Coverages** in the **Endorsement Type** field.

- Note that the (Calculation) Method field will automatically change from the default endorsement calculation method of Pro Rata to Flat Rate.
- Once you have selected Flat Coverages, the Endorsement Type and Method will be greyed out and these fields cannot be amended.

Click the **Coverages** Button. Then, in the **Flat Premium Extension** screen,

- a. Add premium to existing Coverage(s) by typing the premium amount in the **Premium** field that corresponds to the appropriate Coverage(s).
- b. The **Include Premium on Renewal** field will be **Yes** by default. To exclude the premium from the Renewal, click on the Include Premium on Renewal field where it says **Yes**, and the selection will toggle to **No** (see Figure 5.1).

(Figure 5.1)

Premium	Include As Policy Coverage	Include Premium On Renewal	External Under
1000	Yes	No	
	Yes	Yes	

- c. Add a meaningful underwriting note in the **External Underwriting Notes** field.
- d. Next, either click **OK** to return to the Endorsement Request screen or, to add a Rating Definition and/or add/edit Coverage(s), click the **Add Coverages** button at the bottom of the Flat Premium Extension screen (see Figure 5.2).

(Figure 5.2)

test notes
test note
test note

Add Coverages OK

If you select to add a Rating Definition and/or add/edit Coverages,

- a. The **Company List** screen will pop up with the current Rating Details selected. Either verify the details and proceed or, to add a Rating Definition, click to add a check mark to select the Rating Definition, and then click **OK**.
- b. **Optional Coverages** will open with the selected Rating Definition(s) or Rating Engine details. As required, add/edit in the same way you would on a Normal Endorsement Type or from within IntelliQuote. Once applicable changes have been made, click **OK**.
- c. The **Subscription/Fees** screen will open. Note that any additional premium added will automatically be allocated in subscription per the current configuration. Confirm or add/edit subscription details. Click **Next**, and confirm or add/edit Fees. Click **Finish**.
- d. On the Flat Premium Extension Screen, the newly added Coverage(s) will be there for entry of the Premium.
 - o For newly added Coverage(s), the **Include as Policy Coverage** will be **Yes** by default. To exclude the coverage from the Renewal, click on the Include as a Policy Coverage field where it says **Yes**, and the selection will toggle to **No**.
 - o Similarly, the **Include Premium on Renewal** will be **Yes** by default. To exclude the premium from the Renewal, click on the Include Premium on Renewal field where it says **Yes**, and the selection will toggle to **No**.

Complete the Endorsement by confirming the details on the **Endorsement Request** screen, and then click **OK**.

Finalize this Endorsement transaction by dragging a Green Endorsement onto the Yellow Endorsement. Complete a final review of the details and click OK to complete the transaction.

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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.



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Gold Independent Software Vendor (ISV)

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