



2 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 enhancements and newest features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

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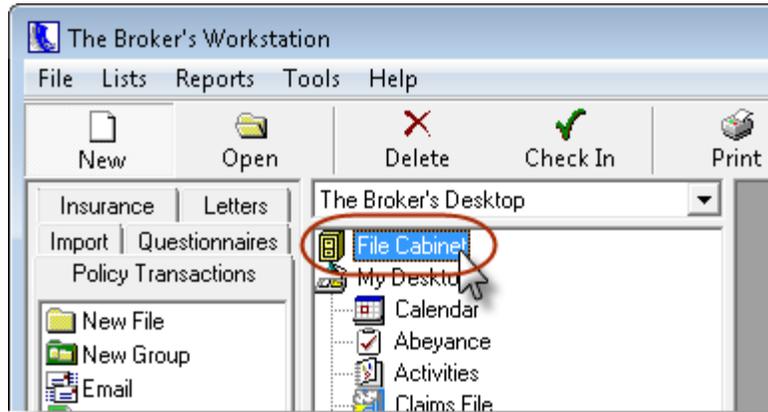
1. [View the Assigned CSR in the Open a File Dialog](#) – The CSR assigned to a folder is now displayed in the Open a File dialog.
2. [Auto Transact and Batch Transacting of Downloaded Policies](#) – Use Auto Transact to set up a rules engine that will allow automatic transaction of low-risk, qualifying downloaded transactions. For medium-risk transactions, use the Batch Transacting system to make necessary individual modifications and then transact the batch with one click.
3. [Access Credit Score Form from Policy Documents](#) – Complete the Credit Score form for applicable renewals and endorsements to ensure relevant discounts are applied and to assist in premium matching of TBW Coverages.

## 1. View the Assigned CSR in the Open a File Dialog

The **Open a File** dialog now includes a column displaying the CSR assigned to each folder, as applicable, enabling the TBW/TUW user to verify the CSR without checking out the folder.

To open the File Cabinet, double-click **File Cabinet** in the **Desktop Tree** (see Figure 1.1).

(Figure 1.1)



In the **Open a File** dialog, apply **Search** filters as required to locate the target folder(s), and then click the **Find Now** button. In the list of folders that displays, the **CSR** column will provide the name of the CSR assigned to each folder, as applicable (see Figure 1.2).

(Figure 1.2)

Search Name	Address	Sticky Note	Producer	CSR
ttaro, Ashley	225 Metcalf St - ...		Lars Campbell	Gilly Goodall
itken, Bess	2 Adam's Pond R...		Patrick Goodall	Pam Cranston
itken, Alexander	2 Adam's Pond R...		Patrick Goodall	Pam Cranston
dams, Heather	1 Mulberry Lane ...		Annie Cameron	Lainey Russell
itken, Davis	9 Laura Secord P...		Annie Cameron	Lainey Russell
itken, Mhairi	9 Laura Secord P...		Annie Cameron	Lainey Russell

Please note the following when viewing assigned CSRs in the Open a File dialog:

- Only the top-ranked CSR for the folder will display in the dialog.
- Click the CSR column heading (or any other column heading) to sort the folder list by that category.
- Search results cannot be filtered by CSR criteria (i.e. when search filters are applied using the **Filter** button, CSR is not available for selection as a filter).
- The CSR column will be included if the folder list is printed.

*Please note this feature is available only to those working with the New Policy Entry system. If you are not currently set up to use New Policy Entry, please contact Client Services to make your appointment for this no-charge upgrade.*

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## 2. Auto Transact and Batch Transacting of Downloaded Policies

To date, download processing has been very manual. Check out folder, check out document, review, edit, transact, check in folder... Then there is the separate matter of preparing the resulting client communication... While there are cases where this level of hands-on processing is essential, there are also cases where one can confidently leave it to the system based on a risk analysis.

Some concerns in the risk analysis include:

- Agent Bill is more error sensitive than Direct Bill due to customer facing invoices.
- There is a range of download data anomalies for certain carriers and/or transaction types that must be corrected at the time of transacting.
- Transaction descriptions are useful for both internal and external user needs, but not useful on downloads, particularly endorsements.

The risk assessment suggests a continuum of processing automation:

- High Risk > Low Automation > Download Only, manual transact
- Medium Risk > Semi-Automation > Batch Transacting
- Low Risk > Full Automation > Auto Transact

Auto Transact gives the organization the capability to set up a rules engine that will allow qualifying downloaded transactions (CSIO or Wawanesa I-Biz) the organization assesses as being low risk to be automatically transacted to the accounting system on download. The rules engine also allows the definition of a word processor template that will auto generate for the download item that is auto transacted. For example, you can specify that a particular renewal letter template will be used to create a letter for renewals of a particular line for a particular company. The letters are placed in the correct Client folder and are queued to a new print manager for the assigned staff person.

To address the important matter of the description on transactions, CSSI built a batch transacting system where you can load all your endorsements, for example, and individually update all the descriptions on a single screen and then transact the batch with one click. This will be useful for new business and cancellations, as well, since it allows the user to do a similar update of Transaction Qualifiers and Custom Cancellation Reasons in the same manner to support management analysis of these transaction types. Batch Transacting also allows the definition of a word processor template that will auto generate for the download item that is batch transacted. This letters are placed in the correct Client folder and are queued to the print manager for the assigned staff person.

The combination of Auto Transact and Batch Transact will provide a balance of speed and attention to detail with full auto efficiency where the need for CSR involvement is minimal, and then a semi-automated solution where there is need for limited touch and edit of the download document

before it is transacted. The remaining downloads can then be transacted manually and afforded the attention and tuning they deserve.

If you would like to have Auto Transact and Batch Transacting enabled on your system, please contact our Client Services Team at [clientservices@cssionline.com](mailto:clientservices@cssionline.com) (email) or 1-888-291-3588 (toll-free telephone). Please note that a one-time setup charge and an additional monthly support fee will apply for the Auto Transact feature. Please contact our Sales Team at [sales@cssionline.com](mailto:sales@cssionline.com) (email) or 1-877-281-6944 (toll-free telephone) for more information.

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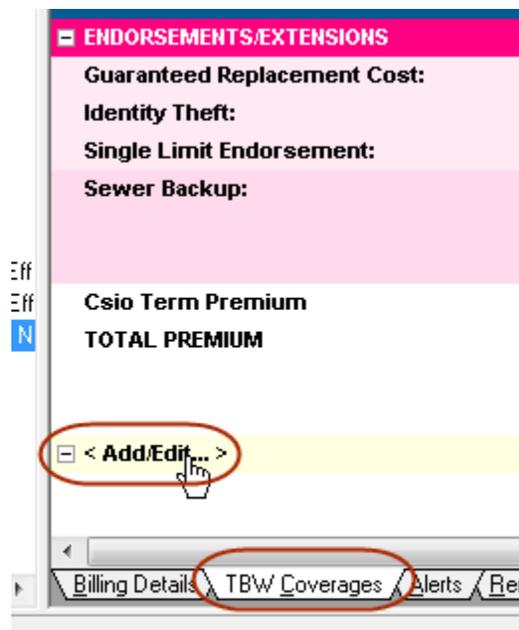
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### 3. Access Credit Score Form from Policy Documents

In response to requests from our users, the Credit Score form is now accessible from qualifying renewal and endorsement documents. Complete the Credit Score form for applicable documents to ensure relevant discounts are applied and to assist in premium matching of TBW Coverages.

To access the Credit Score form in a new or existing policy, click **<Add/Edit...>** on the **TBW Coverages** tab in the policy document (see Figure 3.1).

(Figure 3.1)



Move through the pop-up forms, making adjustments as required. If the policy qualifies, the **Credit Score** form will display after the **List of Claims** form. Complete the form 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 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.



**Microsoft** Partner

Gold Independent Software Vendor (ISV)