



24 February 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 enhancements to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

***Contents***

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1. [Mark Non-I-Biz Request Documents as Deleted](#) – Mark a non-I-Biz request document as 'Deleted' to keep the request in the client's document history, creating a record that the request has not been sent to the Company.
2. [TBW and CGI's Website Changes](#) – TBW has been updated with adjustments to accommodate the recent changes to CGI's website.
3. [New Auto Applications for Brokers in Alberta and in the Maritimes](#) – The Alberta, Nova Scotia, New Brunswick, and PEI Application for Automobile Insurance forms have been updated for applications with a Calculation Date on or after January 1, 2014.

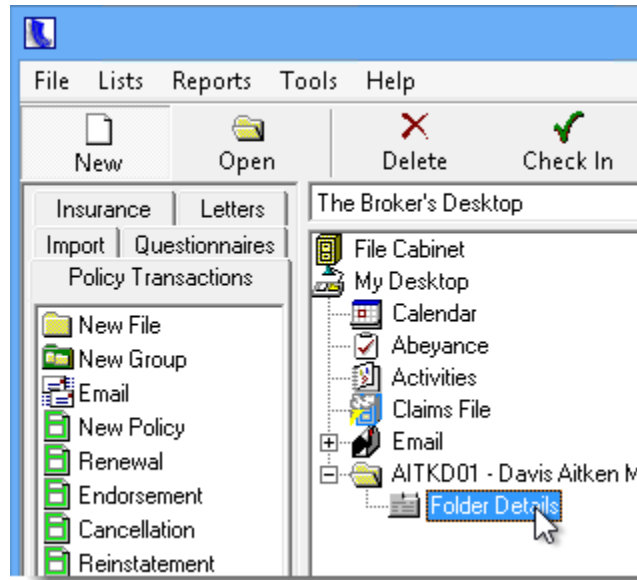
**1. Mark Non-I-Biz Request Documents as Deleted**

A non-I-Biz request document created on a manually entered or CSIO downloaded policy can now be 'Marked as Deleted.' Marking a yellow request document (a Cancellation Request, Endorsement

Request, or Reinstatement Request) as deleted will keep the request in the client's document history, creating a record that it has not been sent to the Company. This feature may be particularly useful when a request document is no longer needed (e.g. if a new document is received from the Company before the request has been sent).

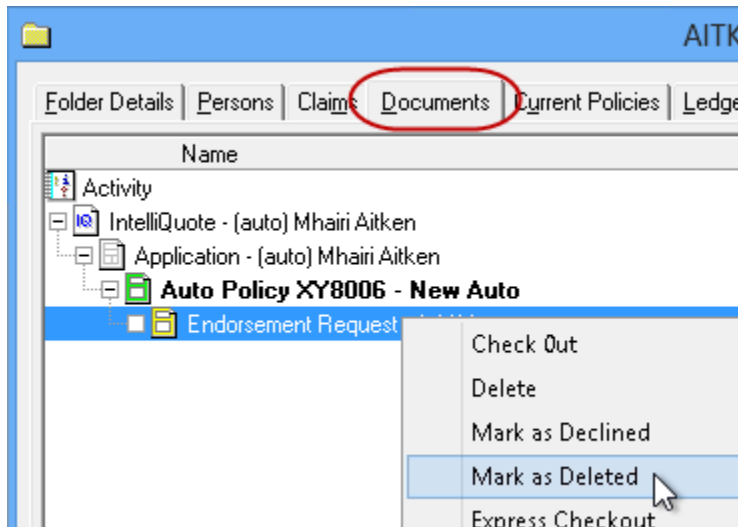
To mark a non-I-Biz request document as deleted, first open the Client folder by double-clicking **Folder Details** in the **Desktop Tree** (see Figure 1.1).

(Figure 1.1)



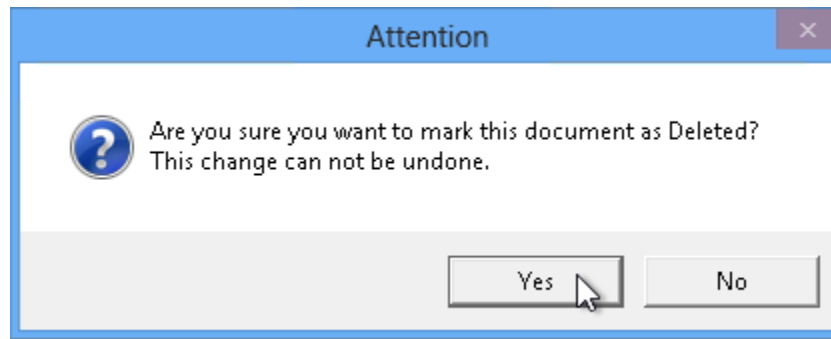
On the **Documents** tab in the Folder Details dialog, find and right-click the yellow request document. In the right-click menu, select **'Mark as Deleted'** (see Figure 1.2).

(Figure 1.2)



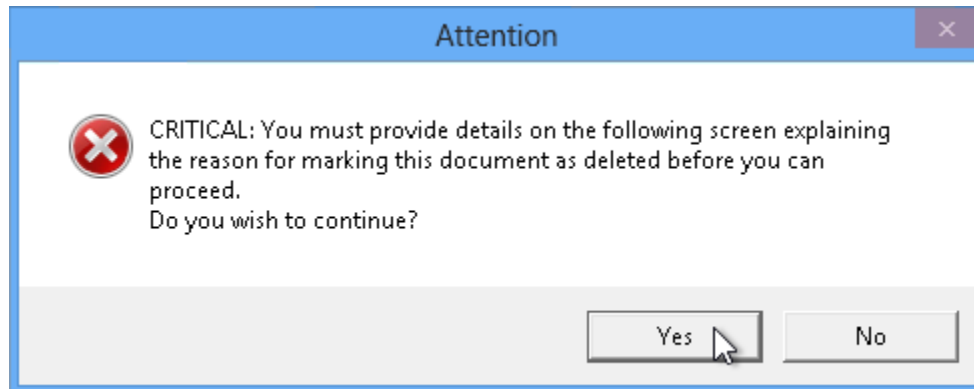
In the **Attention** box that displays, click **Yes** to mark the document as deleted (see Figure 1.3).

(Figure 1.3)



A second **Attention** box will display, indicating that you must provide details about the deletion on the next screen. Click **Yes** to continue (see Figure 1.4).

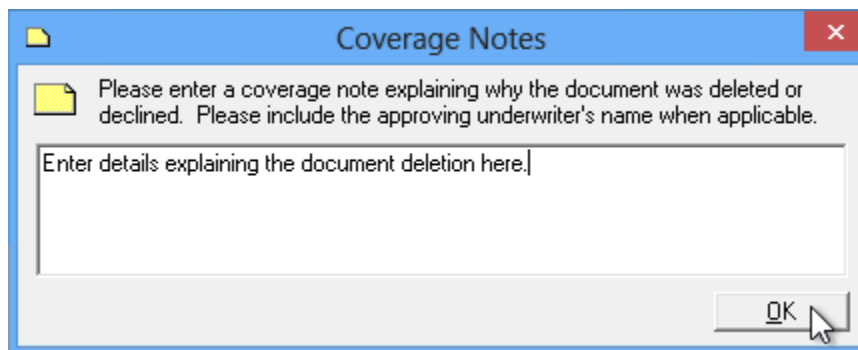
(Figure 1.4)



In the **Coverage Notes** dialog, enter details explaining why the document is being deleted, and click **OK** (see Figure 1.5).

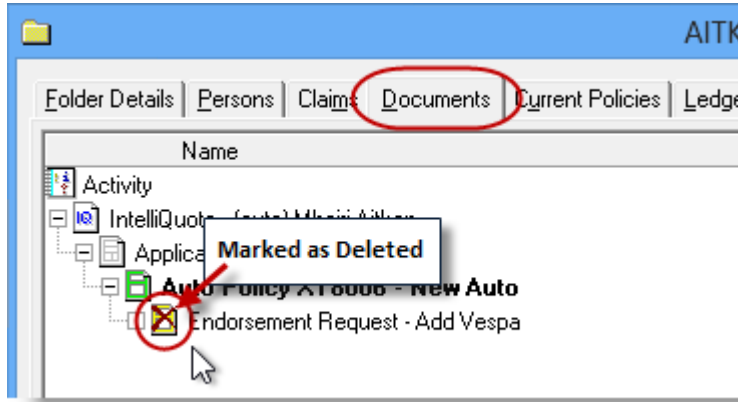
- Be sure to include the approving underwriter's name, when applicable.

(Figure 1.5)

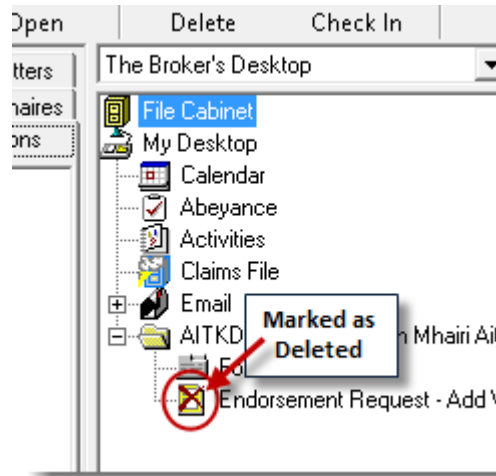


When the non-I-Biz request document has been marked as deleted, the document will display with a red 'X' (✘) in the Documents list and in the Desktop Tree, making it easily identifiable for all TBW/TUW users (see Figures 1.6 and 1.7).

(Figure 1.6)



(Figure 1.7)



The document's **Transaction Status** will also be updated in the document details in the Document Window (see Figure 1.8).

(Figure 1.8)

Expiry Time:	12:01 AM
Billing Type:	Agency Bill
I-Biz Mail Status	Not Sent
<b>Transaction Status:</b>	<b>Deleted</b>
Change Premium:	\$125.00
Term Premium:	\$1,440.00
Annual Premium:	\$1,440.00

Please note, this feature is controlled by **User Rights** (through Tools, Administrative, User Manager, Rights).

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## 2. TBW and CGI's Website Changes

CGI recently released changes to its website for Autoplus and MVRs. At that time, we informed our TBW users that some manual entry would be required on the CGI website until the next TBW code release.

Now, TBW has been updated with adjustments to accommodate fully these changes to CGI's website. TBW's WebConnect feature will connect the user to the CGI website in the usual manner, and additional manual entry will no longer be required on the CGI website.

Please refer to the attached memo from CGI for additional important information about the recent changes to its website.

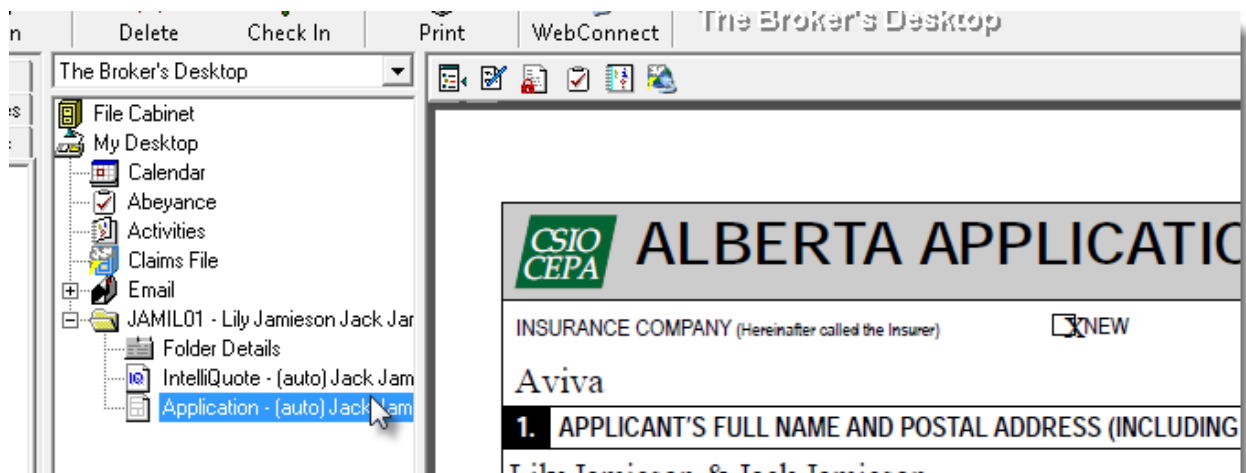
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## 3. New Auto Applications for Brokers in Alberta and in the Maritimes

The Alberta, Nova Scotia, New Brunswick, and PEI Application for Automobile Insurance forms have been updated for applications with a Calculation Date on or after January 1, 2014.

To create a new 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 3.1).

(Figure 3.1)



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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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)