



26 April 2016

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. [Additional Auto Claims Fields](#) – The Payment area in the Auto Claims Details form has been reorganized and enhanced with additional payment fields.
2. [Additional Invoice Print Options from Ledger Card](#) – Additional one-off printing options for invoices, including *PDF to folder* and *PDF to email*, are now available on client and broker Ledger Cards.
3. ["About" Feature in Void Receipts Current and Closed Periods List](#) – Right-click an item in the Void Receipts Current or Closed Periods lists and select "About" to view additional details about that item.
4. [Preset Improvements in Custom Financial Report](#) – The Presets feature in the Custom Financial Report has been enhanced with a number of changes, including a prompt to save new and modified report parameters as a Preset, as well as inclusion of the Preset name in the printed report.

1. Additional Auto Claims Fields

The payment area in the **Auto Claims Details** form has been reorganized and enhanced with additional fields. Please note, while these modifications were made in TBW/TUW in preparation for the upcoming changes to Ontario's Auto Insurance Policy, the enhancements are available in the Auto Claims Details form for all TBW/TUW users.

The following changes have been made to the Auto Claims Details form:

- Payment fields are now presented in three separate sections – **Payment by Insurer**, **Estimated Payment by Insurer**, and **Payment by Insured** (see Figure 1.1).

(Figure 1.1)

The screenshot shows the 'Claims Details' window with the following fields:

- Policy Type: Auto
- Location: [Empty]
- Loss Date: / / MM/DD/YYYY
- Description: [Empty]
- Pertains To: [Empty]
- Peril: [Empty]
- Insurance Company: [Empty]
- Policy Number: [Empty]
- Reference Number: [Empty]

The payment sections are highlighted with a red box:

Payment By Insurer	Estimated Payment By Insurer	Payment By Insured
Coll. Payment: [Input]	Collision Payment: [Input]	Collision: [Input]
Cmp. Payment: [Input]	Cmp. Payment: [Input]	
TPL Payment: [Input]	TPL Payment: [Input]	
BI Payment: [Input]	BI Payment: [Input]	
PD Payment: [Input]	PD Payment: [Input]	PD: [Input]
AB Payment: [Input]	AB Payment: [Input]	
Amount Paid: [Input]	Total Estimate: 0.00	

- The **Payment by Insured** section, which includes two fields (**Collision** and **PD**), was added to accommodate the new minor chargeable accident rule in the upcoming changes to Ontario's Auto Insurance Policy (see below).

Minor Accidents

Subject to the exception described below, an insurer may not take into consideration a minor accident that occurs on or after June 1, 2016 in deciding whether to issue, renew or cancel a contract or in determining the premium, if all of the following criteria are met:

The cost of damage to each vehicle involved in the accident, including any property damage, does not exceed \$2,000, and the cost of all such damages is paid by the at-fault party;

No personal injuries are sustained as a result of the accident;

No payment is made by any insurer for any damage to the vehicles or property resulting from the accident.

Exception: An insurer may consider a minor accident that occurs on or after June 1, 2016 in deciding whether to issue, renew or cancel a contract or in determining the premium, if the vehicle was involved in a total of more than one minor accident in the previous three years, and in each accident the driver of that vehicle was at fault.

- The **TPL Payment** field has been split into **BI Payment** and **PD Payment** fields in the *Payment by Insurer* and *Estimated Payment by Insurer* sections (see Figure 1.2).
 - When amounts are entered in the BI Payment and PD Payment fields, the total of these amounts will display in the TPL Payment field. (Please note that the total amount cannot be entered directly in the TPL Payment field.)

(Figure 1.2)

Payment By Insurer		Estimated Payment By Insurer	
Coll. Payment:	<input type="text"/>	Collision Payment:	<input type="text"/>
Cmp. Payment:	<input type="text"/>	Cmp. Payment:	<input type="text"/>
TPL Payment:	250.00	TPL Payment:	<input type="text"/>
BI Payment:	200.00	BI Payment:	<input type="text"/>
PD Payment:	50.00	PD Payment:	<input type="text"/>
AB Payment:	<input type="text"/>	AB Payment:	<input type="text"/>
Amount Paid:		Amount Paid:	0.00

Enter amounts in the **BI Payment** and **PD Payment** fields to view total amount in TPL Payment field

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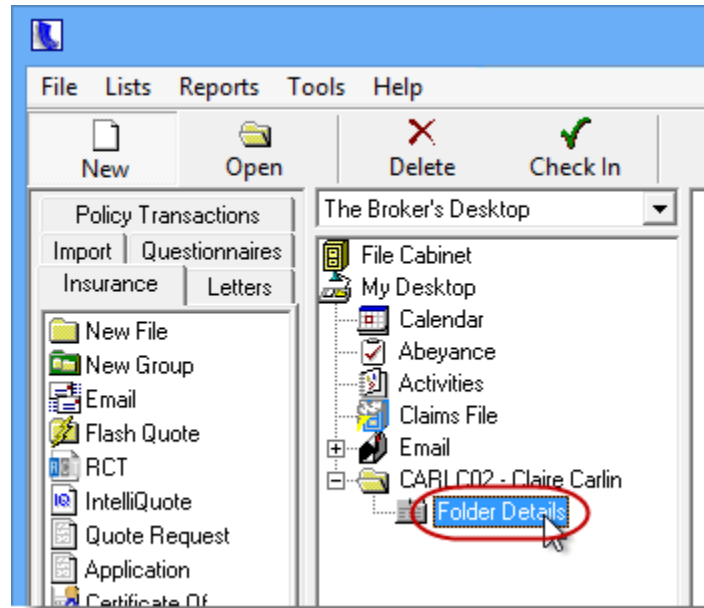
2. Additional Invoice Print Options from Ledger Card

Please note: This new feature is currently available via a switch for any TBW/TUW user wishing to be a beta tester for this functionality. Please contact Client Services if you are interested in being a beta tester for this feature.

Until now, a one-off invoice could be printed from the client or broker Ledger Card simply by right-clicking the transaction on the Ledger Card and selecting **Reprint Invoice** in the right-click menu. In response to requests from our clients, additional one-off invoice printing options, including **PDF to folder** and **PDF to email**, are now available on the Ledger Card.

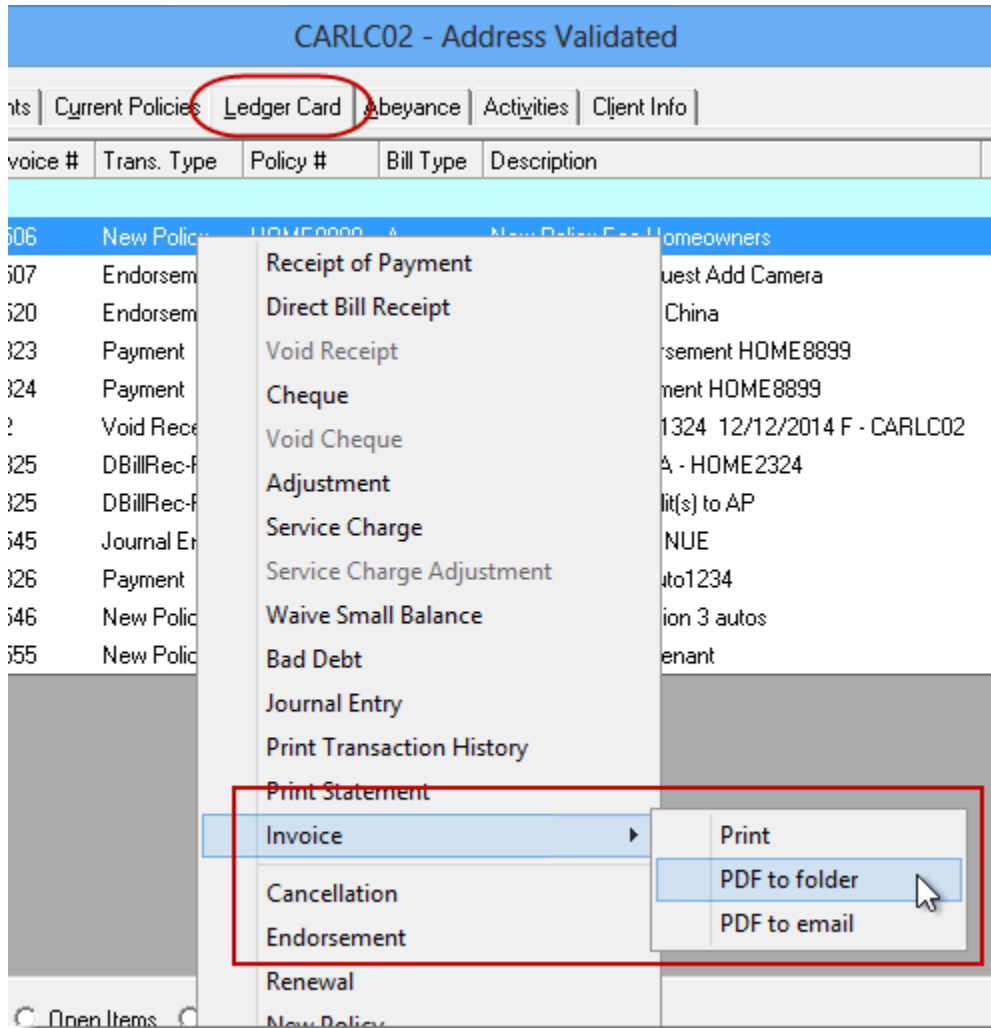
To access the Ledger Card, first double-click **Folder Details** in the Desktop Tree (see Figure 2.1).

(Figure 2.1)



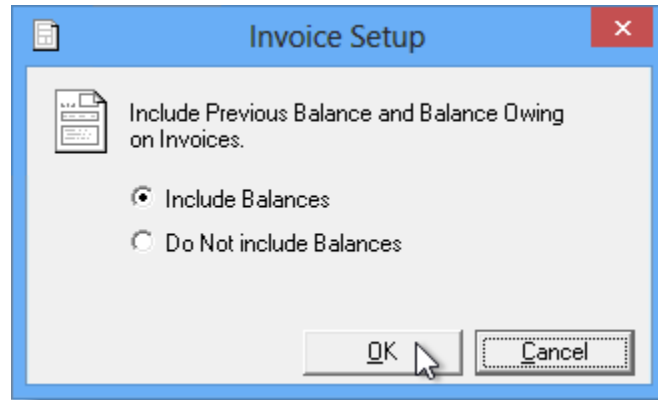
In the Folder Details window, click the **Ledger Card** tab. To view printing/PDF options for an invoice, right-click the target transaction and, in the right-click menu, select **Invoice**, and then choose **Print**, **PDF to folder**, or **PDF to email** (see Figure 2.2).

(Figure 2.2)



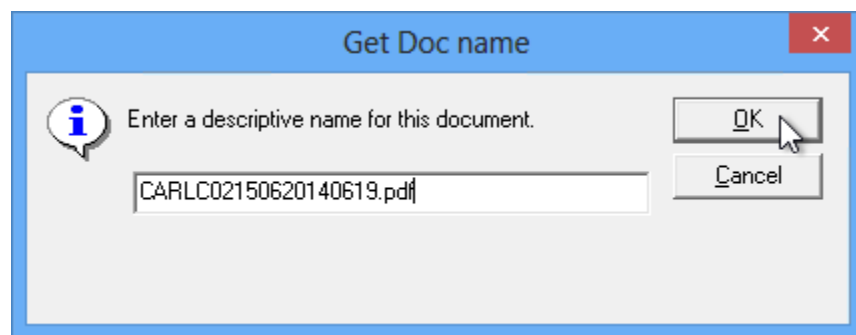
- Select **Print** to print a copy of the invoice. In the **Invoice Setup** box that displays, select whether to include the previous balance and balance owing on the invoice, and click **OK** (see Figure 2.3). If **Print Preview** is enabled (through *Tools, Options, Printing*), first preview and then print the invoice.

(Figure 2.3)



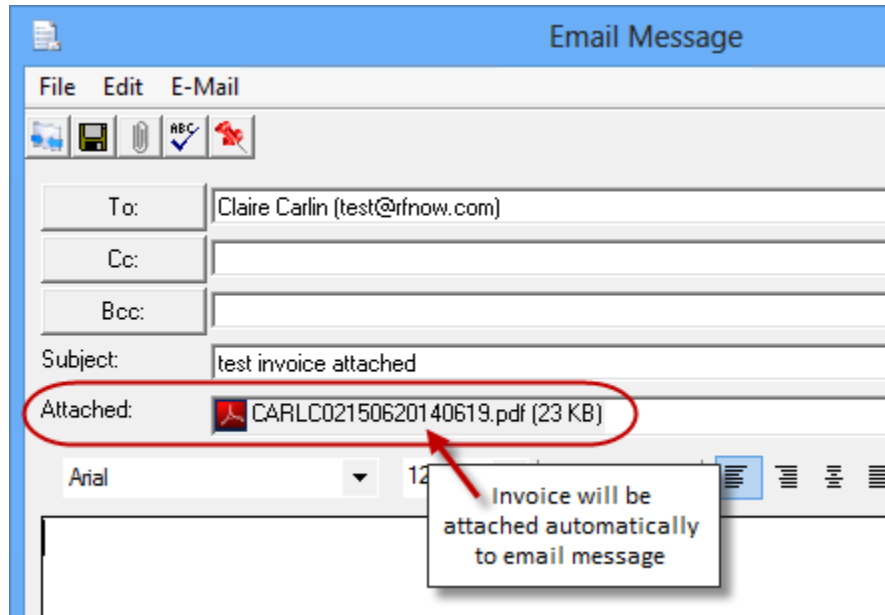
- Select **PDF to folder** to save a PDF copy of the invoice to the client or broker folder. In the **Invoice Setup** box, choose whether to include balances on the invoice. Then, adjust the document name, if necessary, in the **Get Doc Name** box, and click **OK** (see Figure 2.4).

(Figure 2.4)



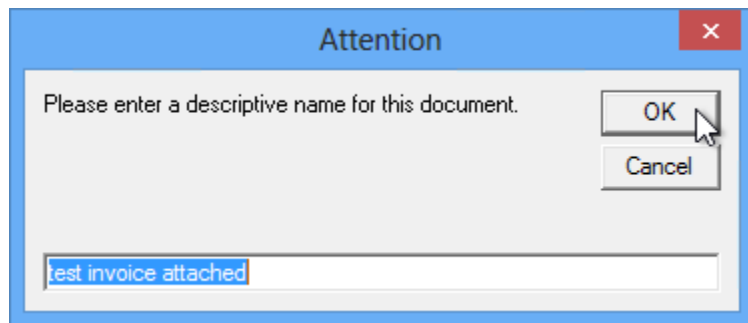
- The document name will default to the *Folder Code, Invoice Number, and Invoice Date*, but this can be changed, as required.
- The PDF invoice will display on the Desktop Tree and will be available on the Documents tab in Folder Details.
- Select **PDF to email** to attach a PDF copy of the invoice to a new email message. In the **Invoice Setup** box, choose whether to include balances on the invoice. Then, adjust the document name, as required, in the **Get Doc Name** box. In the **Email Message** dialog, complete and send the email message in the usual way (see Figure 2.5).

(Figure 2.5)



- A copy of the email message will be saved to the client or broker folder. In the **Attention** box, adjust the descriptive name for the email message, if necessary, and click **OK** (see Figure 2.6).

(Figure 2.6)



Please note, this upgraded ability to email one-off invoices from the Ledger Card is the first step in an ongoing development project. Following live testing of this enhancement, development and testing of mass email of invoices will begin.

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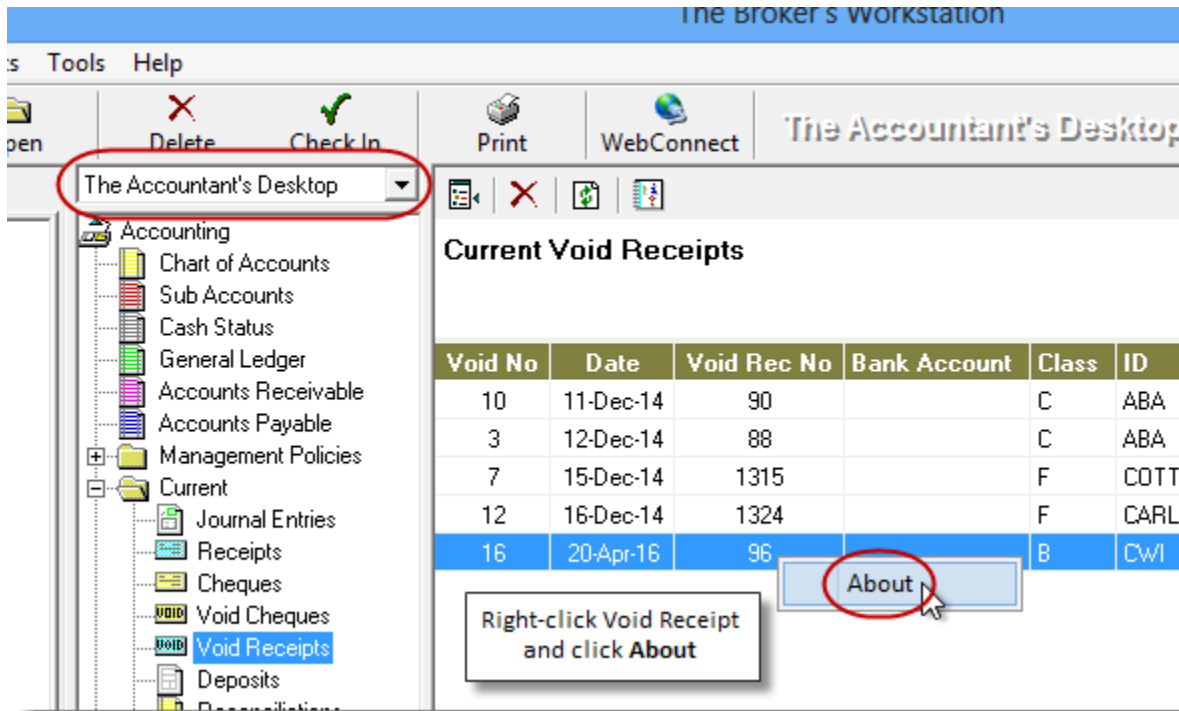
3. “About” Feature in Void Receipts Current and Closed Periods Lists

Please note: This new feature is currently available via a switch for any TBW/TUW user wishing to be a beta tester for this functionality. Please contact Client Services if you are interested in being a beta tester for this feature.

The “About” feature is now available in the Void Receipts Current and Closed Periods lists on The Accountant’s Desktop. To view additional details about a particular void receipt, simply right-click the item, and then select “About” in the right-click menu to view information about the void receipt.

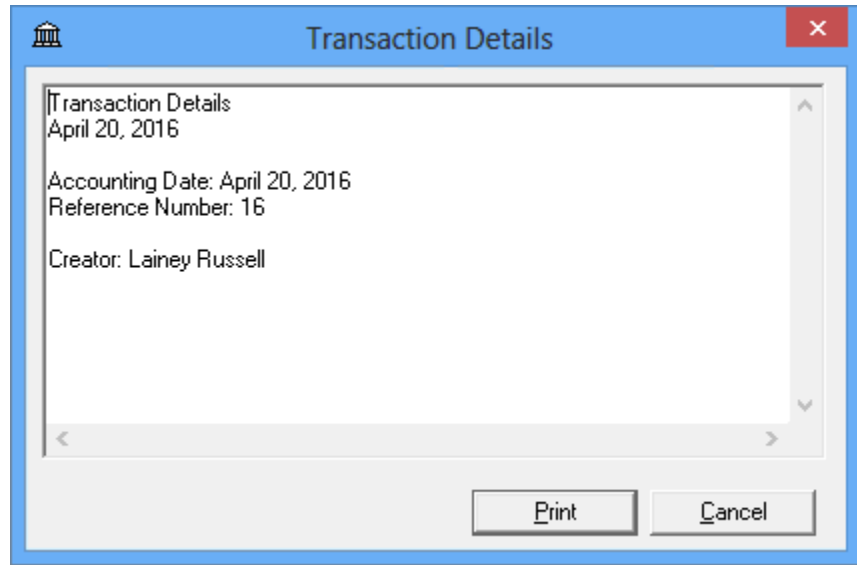
To view this feature, open the Current or Closed Periods Void Receipts list in the usual manner. Right-click the target item in the list and select **About** (see Figure 3.1).

(Figure 3.1)



In the **Transaction Details** window, view information about the void receipt, including the Creator, Accounting Date, and more (see Figure 3.2).

(Figure 3.2)



Click the **Print** button to print the information in the Transaction Details dialog, if required. When you are ready to return to the Void Receipts list, simply click **Cancel** or close the Transaction Details window.

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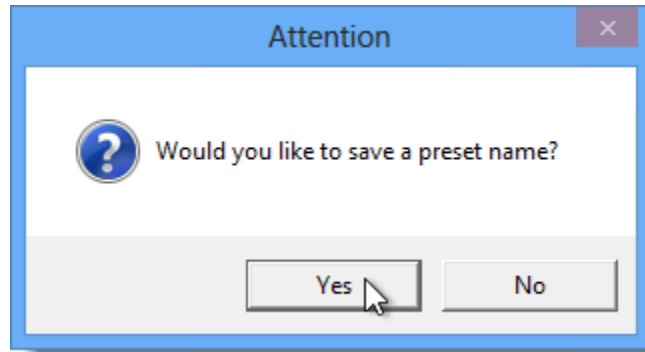
4. Preset Improvements in Custom Financial Report

The timesaving Presets feature in the Custom Financial Report form can be used to save and reuse commonly used report parameters. Rather than having to enter report parameters from scratch each time, you can use a preset to load saved report parameters automatically when creating a new Custom Financial Report.

The Presets feature in the Custom Financial Report has been enhanced with the following changes:

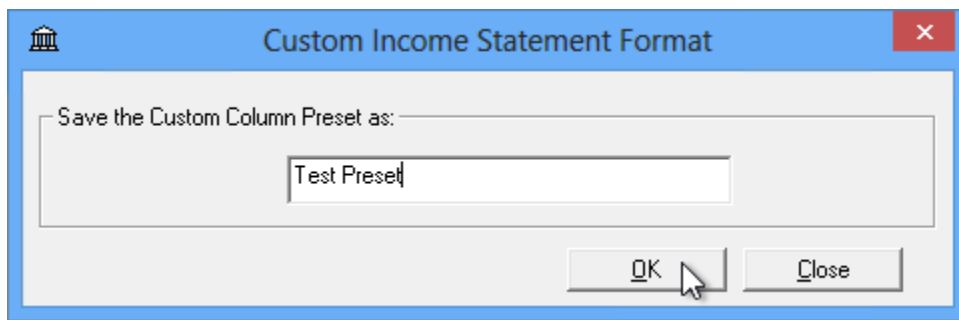
- When a Custom Financial Report is created from scratch (without using a pre-existing Preset), you will be asked if you would like to save these settings as a Preset (see Figure 4.1). Click **No** to generate the report without saving the settings, or click **Yes** to save the selected report settings as a reusable Preset.

(Figure 4.1)



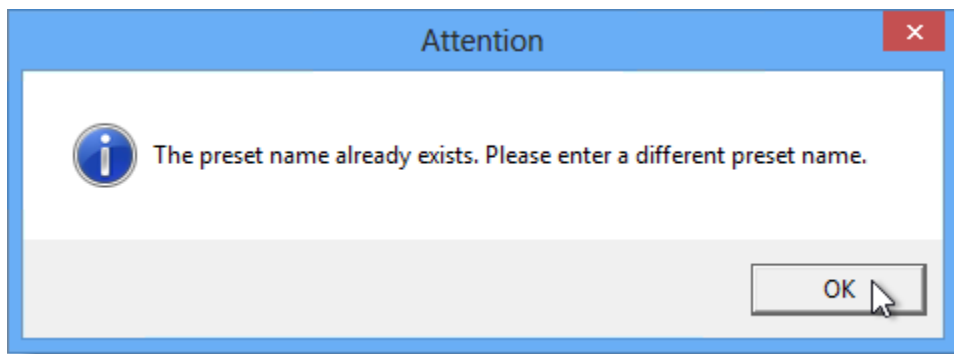
- If Yes is selected, enter a name for the new Preset in the **Custom Income Statement Format** box, and click **OK** (see Figure 4.2).

(Figure 4.2)



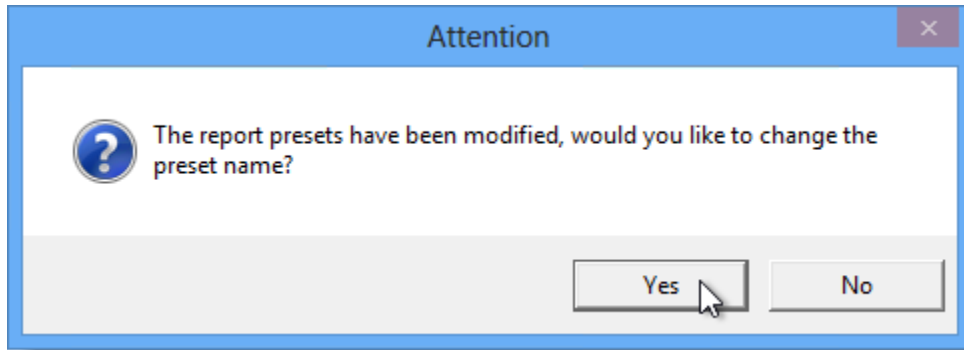
- If you attempt to use a Preset name that is already in use, you will be prompted to enter a different name (see Figure 4.3).

(Figure 4.3)



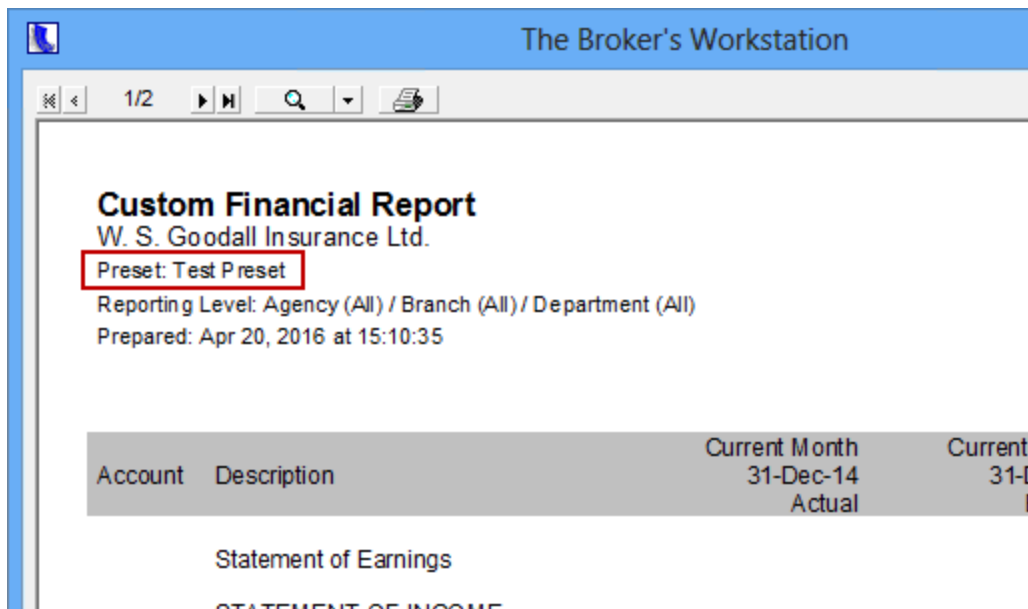
- When you select a Preset to generate a new report and then modify the settings, you will be asked if you would like to save these parameters as a new Preset (see Figure 4.4). Click **No** to generate the report without saving these changed parameters, or click **Yes** to save these settings as a new, reusable Preset.

(Figure 4.4)



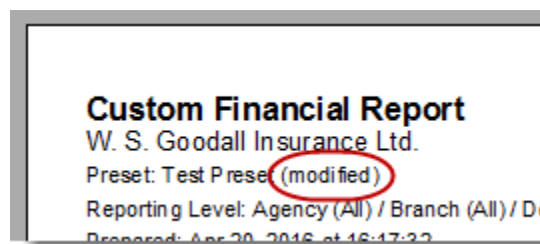
- If Yes is selected, enter a name for the new Preset in the **Custom Income Statement Format** box, and click **OK**.
- When a Preset is used to create a new Custom Financial Report, the Preset name will display on the printed report (see Figure 4.5).

(Figure 4.5)



- If the original Preset settings were changed and were not saved as a new Preset, the printed report will indicate the Preset has been modified (see Figure 4.6).

(Figure 4.6)



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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.