

14 September 2018

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 new features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

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1. [Liability Operations/Receipts on the Operations Tab \(TUW\)](#) – For our TUW users, there is new functionality in IntelliQuote that provides the ability to break out liability operations/receipts separately in an Operations tab.
2. [Add Multiple Lineage Contract Reference Numbers \(TUW\)](#) – The Underwriters Workstation Lloyd's Lineage batch upload functionality has been enhanced with the ability to add more than one Contract Reference Number for each coverage type.

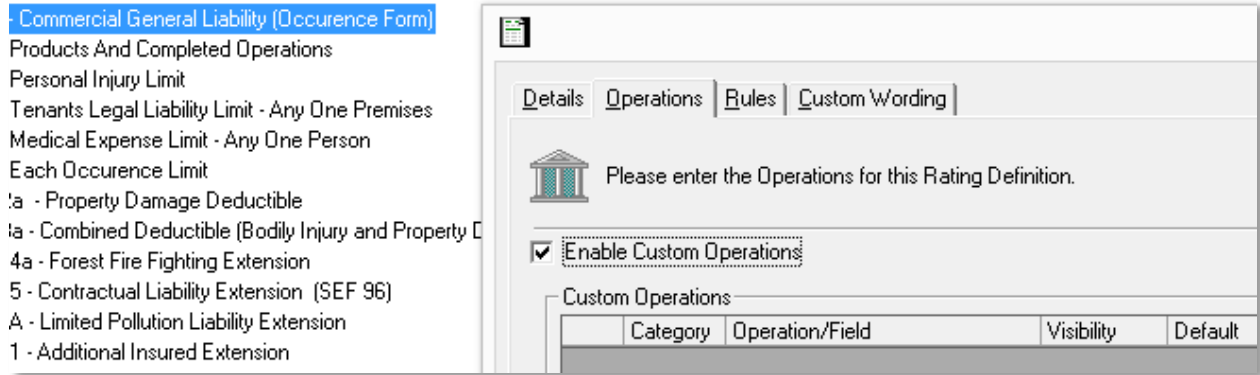
## 1. Liability Operations/Receipts on the Operations Tab (TUW)

Previously in The Underwriters Workstation, liability data collection including gross receipts and operations details was entered in a series of fields in applicable Coverage Items, such as Commercial General Liability. Now in IntelliQuote there is new functionality that provides the user with the ability to break out liability operations/receipts separately in an Operations tab.

The setup for the Operations tab is done in the Rating Definition. To complete the Operations tab setup, go to **Lists – Rating Definitions** and select the Rating Definition to edit. Click the View/Edit

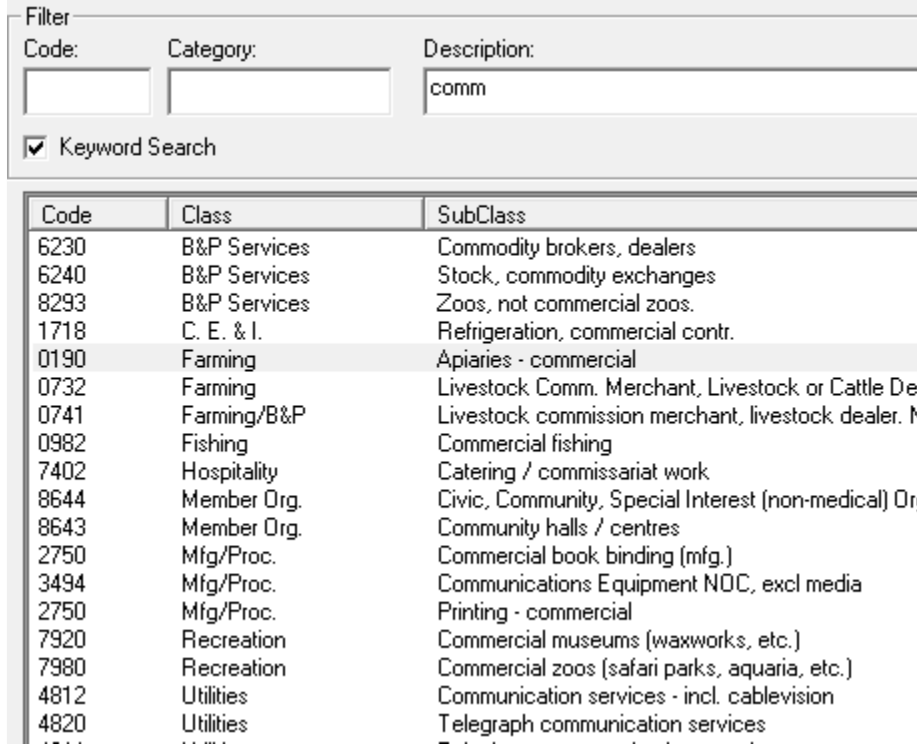
button or double-click to open the Rating Definition details for editing. Select the Coverage Item to edit and click the View/Edit button or double-click to open the Coverage Item for editing. Go to the **Operations** tab (see Figure 1.1).

(Figure 1.1)



Select the **Enable Custom Operations** option. Click the Add button at the bottom of the Operations tab to add default operation(s). The CGL Operation window will open with an IBC code search function. Select **Category: IBC**. Click the Find button to open the Occupancy Codes window. Search for the applicable IBC code by Code, Category, or Description (see Figure 1.2).

(Figure 1.2)



Select the item that is applicable and click OK. The selected Operation will be displayed in the CGL Operation window (see Figure 1.3). Click OK.

(Figure 1.3)

The selected Operation is displayed in the Operations tab with a series of fields that can be defaulted (see Figure 1.4).

(Figure 1.4)

	Category	Operation/Field	Visibility	Default
[-]	IBC - Hospitality	Catering / commissariat work (7402)		
[.....]		Description	Visible	
[.....]		Deductible Rating Basis	Visible	
[.....]		Rating Type	Visible	
[.....]		Can. Receipts	Visible	
[.....]		U.S. Receipts	Visible	
[.....]		Foreign Receipts	Visible	
[.....]		Gross Receipts	Visible	
[.....]		# of Units	Visible	
[.....]		Rate Per	Visible	
[.....]		Premium	Visible	
[.....]		Minimum Premium	Visible	
[.....]		Advance Premium	Visible	

Repeat the steps above to add as many default Operations as appropriate for this Coverage Item.

Each of the Operation/Field options can be edited individually to set the visibility of the field in the IntelliQuote. Options include Visible/Not Visible/Must Edit/Read Only. To change the Visibility option for a field, click on the **Visibility** column in the cell directly beside the field name and select the visibility option from the drop down list (see Figure 1.5).

(Figure 1.5)

3	IBC - Hospitality	Catering / commissariat work (7402)	
.....		Description	Visible
.....		Deductible Rating Basis	Visible
.....		Rating Type	Visible
.....		Can. Receipts	Visible
.....		U.S. Receipts	Not Visible
.....		Foreign Receipts	Not Visible
.....		Gross Receipts	Visible
.....		# of Units	Visible
.....		Rate Per	Visible
.....		Premium	Visible
.....		Minimum Premium	Not Visible
.....		Advance Premium	Not Visible
3	IBC - Hospitality	Restaurants - licensed (5812)	
.....		Description	Visible
.....		Deductible Rating Basis	Visible
.....		Rating Type	Visible
.....		Can. Receipts	Visible
.....		U.S. Receipts	Not Visible
.....		Foreign Receipts	Not Visible
.....		Gross Receipts	Visible
.....		# of Units	Visible
.....		Rate Per	Visible
.....		Premium	Visible
.....		Minimum Premium	Not Visible
.....		Advance Premium	Not Visible

At the bottom of the Operations tab, select the **Allow Additional Operations** option to allow the user to input free form Operations that are not defaulted in the Rating Definition directly into the IntelliQuote. Select **Allow Additional IBC Codes** to allow the user to input additional IBC Code Operations that are not defaulted in the Rating Definition directly into the IntelliQuote (see Figure 1.6).

(Figure 1.6)

The screenshot shows a control panel with two buttons labeled 'Add' and 'Delete'. Below the buttons are two checkboxes, both of which are checked. The first checkbox is labeled 'Allow Additional Custom Operations' and the second is labeled 'Allow Additional IBC Codes'.

In IntelliQuote, the Operations tab will display the defaulted IBC Operations with the fields that were set in the Rating Definition as Visible or Must Edit (see Figure 1.7). These fields are where the data entry gets input for the liability operations breakdown.

(Figure 1.7)

Category	Operation	IBC Code	Find Code	Description	Deductible Rating Basis	Rating Type	Can. Receipts	Gross Receipts	# of Units	Jevco Insurance Company L	
										Rate Per	Premium
IBC - Hospitality	Catering / commissariat work	7402									
IBC - Hospitality	Restaurants - licensed	5812									
			<Find Code>								
			<b>Sub Total</b>								
			<b>Discounts</b>								
			<b>Surcharge</b>								
			<b>Total</b>								

To add an additional Operation, either click on the **Find Code** option to add an additional IBC option or start typing in the Category, Operation, and Code fields to add a custom free form Operation (see Figure 1.8).

(Figure 1.8)

IBC - Hospitality	Restaurants - licensed	5812		
Restaurant	Food Truck		<Find Code>	Temporary food truck locations
			<Find Code>	

Add values to the **Receipts**, **No of Units**, and **Rate** fields and a premium will calculate on each line and total at the bottom (see Figure 1.9). This premium is the total premium for the Coverage Item. Add a Discount or Surcharge in the Premium column beside either the Discount or Surcharge field to change the premium value by the amount of the discount or surcharge added.

(Figure 1.9)

# of Units	Jevco Insurance Company Ltd	
	Rate Per	Premium
20	\$1.12	\$22
2000	\$1.12	\$2,240
30	\$0.50	\$15
		\$2,277
		\$20
		\$2,257

For more information or assistance using the Operations tab in IntelliQuote, contact Client Services at [clientservices@cssionline.com](mailto:clientservices@cssionline.com) or call 888-291-3588.

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## 2. Add Multiple Lineage Contract Reference Numbers (TUW)

The Underwriters Workstation Lloyd's Lineage batch upload functionality has been enhanced by allowing the user to add more than one Contract Reference Number for each coverage type – Property, Crime, and Liability.

To add a Lineage Contract Reference Number (also referred to as an Analysis Description Code), go to Lists – Insurance Companies – Company Underwriting Details tab. In the Contract Numbers section, click on a contract and then click View/Edit. On the **Contract Number Details** screen, click **Add** under Reference Codes and complete the entry of the Contract Reference Number (see Figure 2.1). Click OK to save your entry. Repeat these steps for each Contract Reference Code as applicable.

(Figure 2.1)

Contract Number Details  
Upload Reference Code

Please enter the Upload Reference Code details below...

Reference Number:

Description:

Subsection:

OK Cancel

Reference Codes:

Code	Description	SubSection
10	Liability	Liability
23	Prof Liability	Liability
24	Misc Prof Liab	Liability
42	Cyber Liability	Liability

Add View/Edit Delete

OK Cancel

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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.



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Gold Independent Software Vendor (ISV)

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