



31 March 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

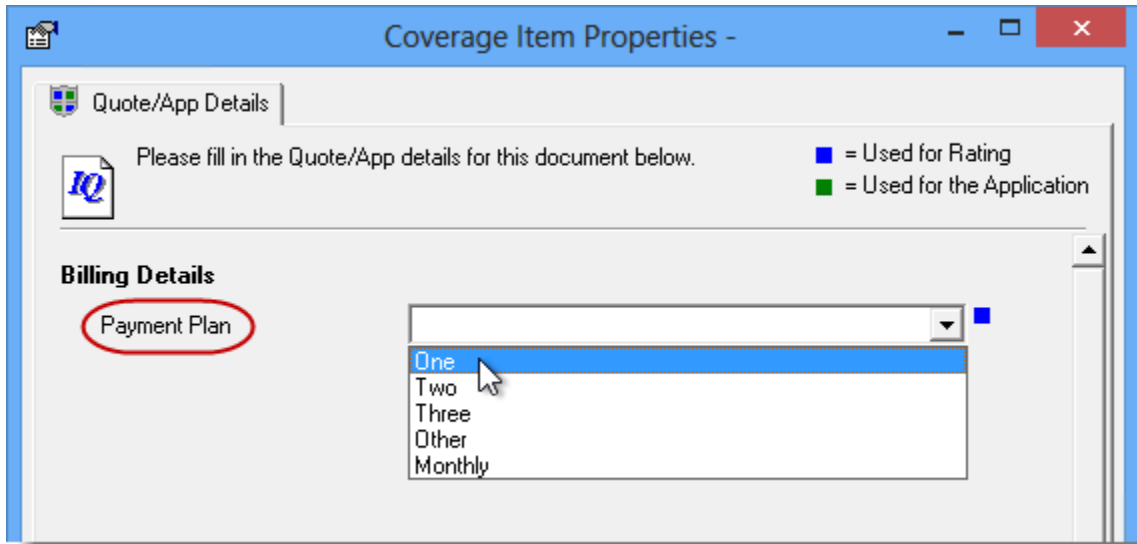
1. [Select Payment Plan Option for Dominion Auto IQ \(ON\)](#) – Ontario brokers who do business with Dominion can now select a payment plan preference while creating an Auto IntelliQuote.

1. Select Payment Plan Option for Dominion Auto IQ (ON)

Ontario brokers who do business with Dominion can now select a payment plan preference while creating an Auto IntelliQuote. This payment plan selection will automatically pull forward to the Application, as well.

Create a Personal Lines Auto IntelliQuote for Dominion in the usual manner. As you work through the windows to enter the required information for the IQ, the **Quote/App Details** screen will display after the List of Claims dialog. Select the applicable **Payment Plan** under **Billing Details** (see Figure 1.1), and click **OK**.

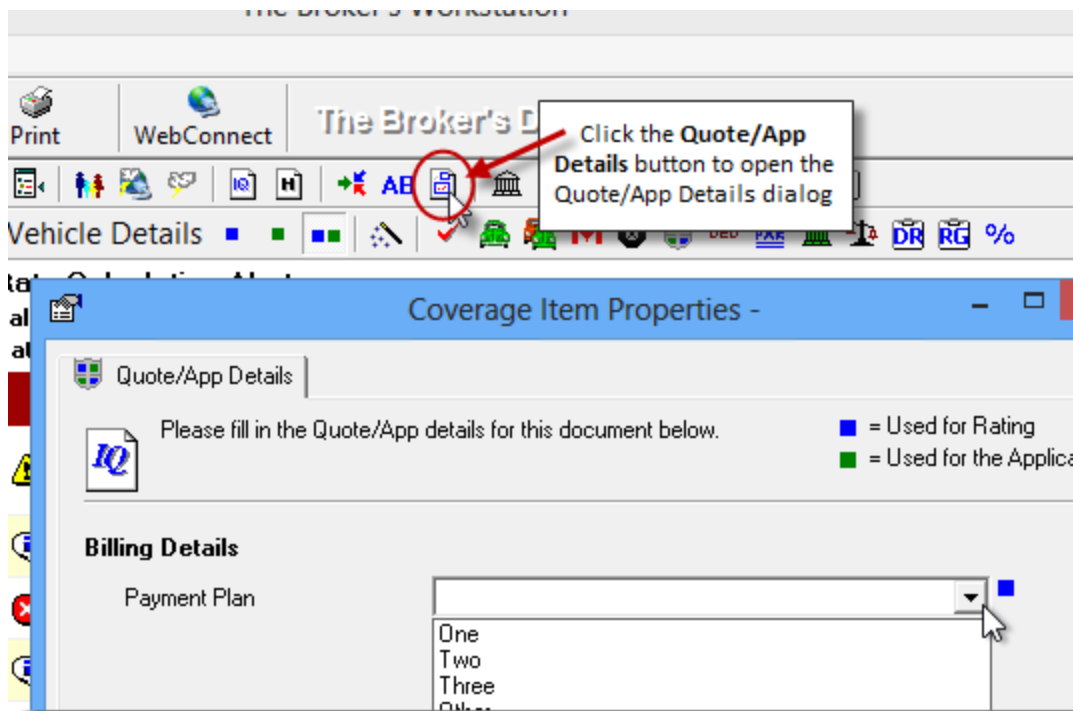
(Figure 1.1)



If **One** Payment Plan is selected, an **Alert** will display on the Alerts tab to notify you that the single-pay discount has been applied. (Please note that the discount will not display in the Dominion Summary Report in the IQ.)

To adjust the payment plan selection in an existing Dominion Auto IQ, click the **Quote/App Details** button on the **IQ toolbar** (see Figure 1.2) to open the Quote/App Details dialog and make the appropriate selection or change.

(Figure 1.2)



The payment plan selected in the Auto IQ will also pull forward automatically to an Application for Dominion. Please note, for a Dominion Application, this payment plan selection cannot be changed in the Application.

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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.