

24 June 2019

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)**:

Contents

1. [Resolution for Balancing/Reconciling Issues in Other Sub Accounts](#) – For some TBW/TUW users, certain codes in Other Sub Accounts have caused issues with balancing and reconciliation. This issue has been resolved, and balancing AR/AP and reconciling Other Sub Accounts items will now function in the normal way.
2. [Garaging Location Tab in Auto IQ](#) – A Garaging Location tab is now available in Auto IntelliQuotes, allowing the user to enter the garaging address for a vehicle.
3. [Import Path Automatically Holds Last Location Selected](#) – When you select a path to find a PDF, image, or another file type to import into TBW/TUW, that selected location will apply the next time you import a file.
4. [View Sub-Broker in Folder View \(TUW\)](#) – For our TUW users, the Sub-Broker assigned to a folder will now display in Folder View.
5. [Policy Code Filter for Bordereaux Report \(TUW\)](#) – Policy Code has been added as an available filter for the Bordereaux Report.

1. Resolution for Balancing/Reconciling Issues in Other Sub Accounts

For some TBW/TUW users, certain codes in Other Sub Accounts have caused issues with balancing Accounts Receivable (AR) / Accounts Payable (AP) and reconciling certain items.

This issue has been resolved and, from now on, balancing AR/AP and reconciling Other Sub Accounts items will function in the normal way. **However, if you continue to have issues with reconciling items, please contact Client Services for assistance with repairing data and updating the applicable XRef code.**

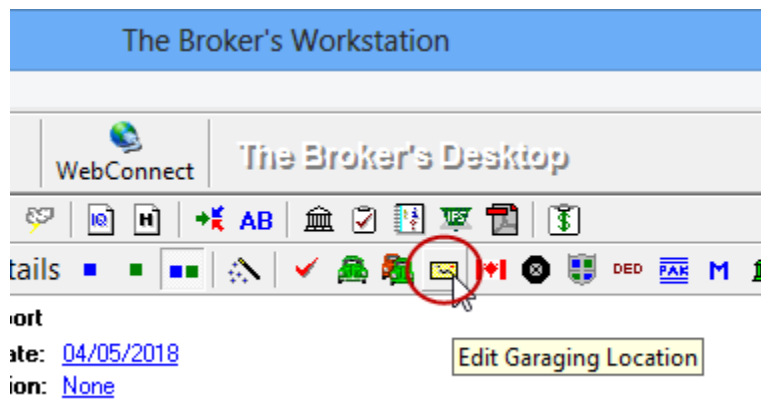
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2. Garaging Location Tab in Auto IQ

A Garaging Location tab is now available in Auto IntelliQuotes, allowing the user to enter the garaging address for a vehicle. This new tab is available for all vehicle types, including Trailer.

The **Garaging Location** step will appear automatically as part of the workflow when you are creating a new Auto IntelliQuote. For existing IQs, you can access the Garaging Location tab by clicking the **Garaging Location** button on the IntelliQuote toolbar (see Figure 2.1).

(Figure 2.1)



On the **Garaging Location** tab in Coverage Item Properties, enter garaging location details for the vehicle.

- When you are creating a new IQ, the address fields on the Garaging Location tab will automatically populate with the folder address. This information can be adjusted, if required.
- Note that the **Copy from other coverage item** button can be used to select and pull location details from another item in the IQ, as needed (see Figure 2.2).

(Figure 2.2)

The screenshot shows the 'Coverage Item Properties' window with the following details:

- Tabbed Interface:** Includes 'Type Of Coverage and Deductible', 'Misc.', 'Discounts/Surcharges', 'Lien Holder/Lessor/Co-Owner', 'Driver Record Overrides', 'Rate Gro', 'Active Items', 'Vehicle Details', 'General Details', 'Garaging Location' (circled in red), and 'Location Factors'.
- Description:** A text input field with a 'Copy from other coverage item...' button.
- PCode:** 'LOS 1J0' with a 'Find Address' button and an 'Override Address Validation' checkbox.
- Street:** Fields for 'Street #' (1), 'Street Name' (Test), 'Street Type' (Lane), 'Street Direction', and 'Suite'.
- City/Prov:** 'Anytown' and 'Prov' (ON). 'Country' is set to 'Canada'.

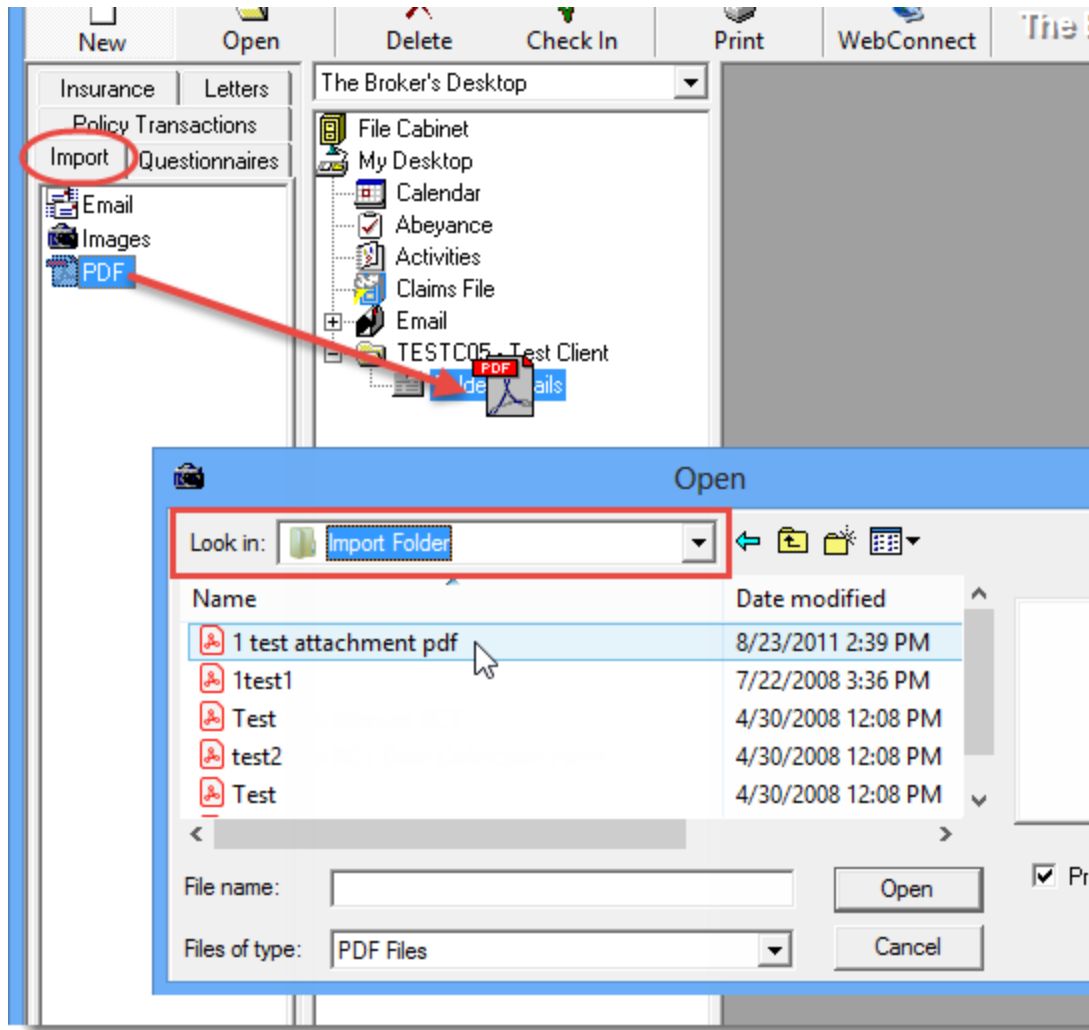
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3. Import Path Automatically Holds Last Location Selected

The Import tab on the Desktop can be used to import PDFs and other types of files into TBW/TUW. When you drag and drop the PDF or Image icon from the Import tab onto a folder or document in the Desktop Tree, the **Open** dialog will display, prompting you to select a path to find the target file to import (see Figure 3.1).

Previously, the file location defaulted to the TBW Directory for each import. Now, the **Look in** field will automatically remember the last location you selected. This improvement will be a timesaver particularly when a large number of files are to be imported from the same file location.

(Figure 3.1)



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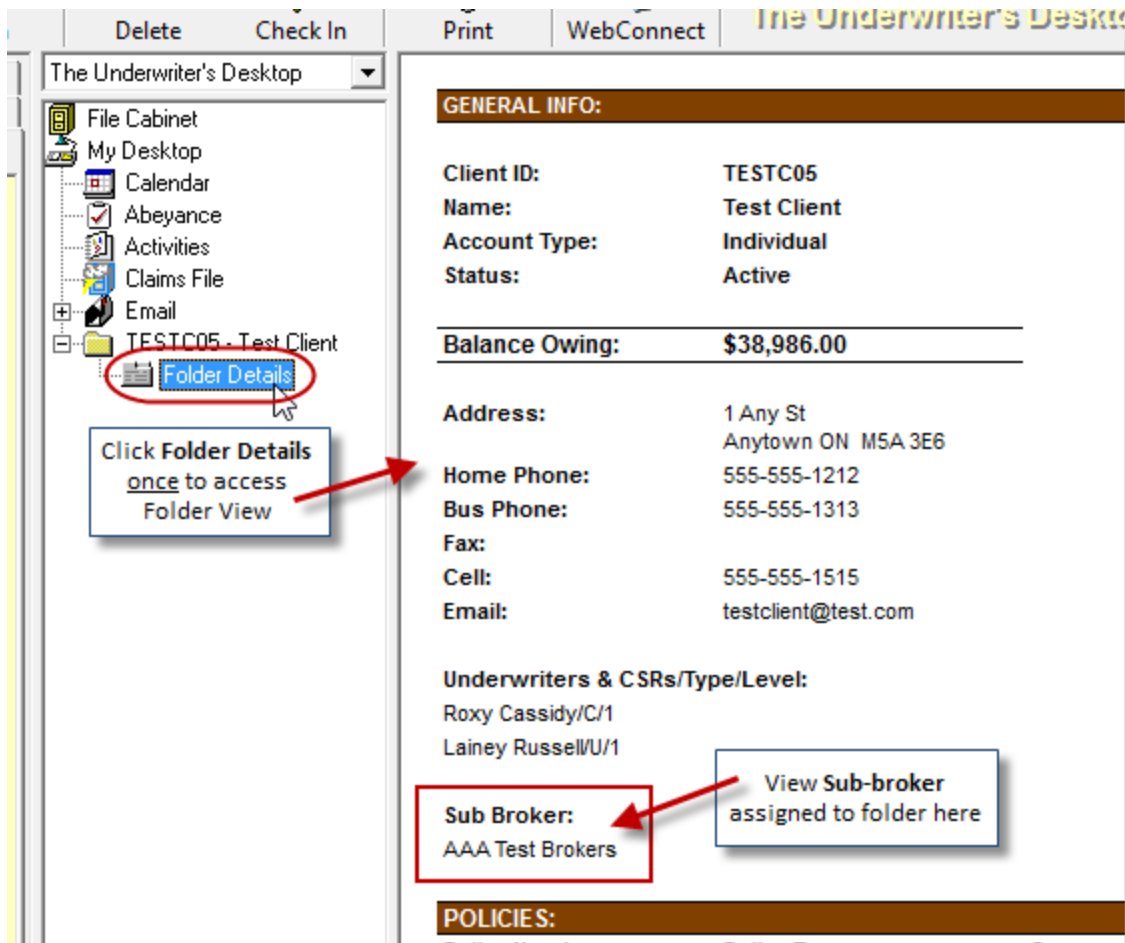
4. View Sub-Broker in Folder View (TUW)

For our TUW users, the Sub-Broker assigned to a folder will now display in Folder View.

Folder View displays a summary of important details for the folder, including contact information, policies, open Abeyances, and more. To access Folder View, click **Folder Details** in the Desktop Tree once to view folder information in the Document Window (see Figure 4.1).

- Note that applicable **Sub-Broker** details will now display in Folder View, immediately below Underwriter and CSR details.

(Figure 4.1)

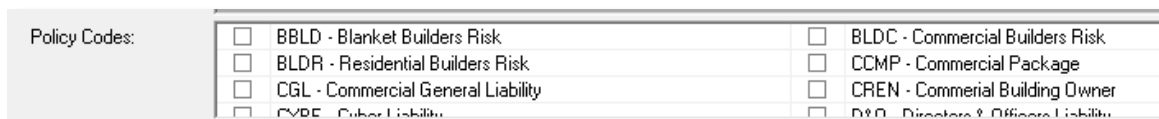


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5. Policy Code Filter for Bordereaux Report (TUW)

Previously, TUW Bordereaux templates could be filtered by Transaction, Company Rating Detail, and Contract. Policy Code has been added as an available report filter (see Figure 5.1).

(Figure 5.1)



To add Policy Code(s) to a bordereau template, go to **Reports, Bordereaux Report**. On the **New Report** tab, select the **Report Name**. When the report loads, click **Modify** to edit the report. Select

the applicable **Policy Code(s)** by clicking in the box to the left of the Policy Code. Selected Policy Codes will display with a check mark. Click **Save**.

A Bordereau with Policy Code filters set will return results which include only policies where the specified Policy Code(s) exist on one or more subscription lines.

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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.



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Gold Independent Software Vendor (ISV)

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