



16 June 2020

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. [Separate Fields for Boat and Motor](#) – Separate Deductible, Coverage Type, and Appraisal Date fields are now available in IntelliQuote for the Boat & Motor item.

1. Separate Fields for Boat and Motor

In the habitational IntelliQuote, separate Deductible, Coverage Type, and Appraisal Date fields are now available for the Boat & Motor item, allowing you to enter details separately for a boat and motor.

- Please note, these new fields are available in the original IntelliQuote and in the new revised IntelliQuote (the improved habitational IQ is currently available via a switch – please contact Client Services if you are interested in being a beta tester for this feature).

The updated Boat & Motor fields are available when you are creating a new IntelliQuote or modifying an existing IQ. In Coverage Item Properties, enter/adjust details as applicable in the following fields.

- For the original IntelliQuote, the new fields will display as follows:
 - **Boat Appraisal Date** and **Motor Appraisal Date** fields (see Figure 1.1)

(Figure 1.1)

Coverage Item Properties - Boat & Motor

DED Deductible | M Misc. | % Discounts/Surcharges | Liability

Active Items | **General Details** | Protection | Cov

Enter the General Details for this coverage item.

Description

Use: Personal Use

Rented to Others: No

Boat Appraisal Date: 06/01/2020

Motor Appraisal Date: 06/05/2020

Boat Details

- **Boat Coverage Type** and **Motor Coverage Type** fields (see Figure 1.2)

(Figure 1.2)

Coverage Item Properties - Boat & Motor

DED Deductible | M Misc. | % Discounts/Surcharges | Liability | Lien Holder/Lessor/Co-Owner

Active Items | General Details | Protection | Coverage Limits | **Type of Coverage**

Select the type of coverage for this coverage item.

■ = Used for Rating
■ = Used for the Application

Boat Coverage Type for ...

Hamilton Township Mutual	Comprehensive	■
Kent & Essex Mutual Ins	All Risk	■
Portage Mutual	All Risk	■

Motor Coverage Type for ...

Hamilton Township Mutual	Comprehensive	■
Kent & Essex Mutual Ins	All Risk	■
Portage Mutual	All Risk	■

- **Boat Deductible** and **Motor Deductible** fields (see Figure 1.3)

(Figure 1.3)

Coverage Item Properties - Boat & Motor

Active Items | General Details | Protection | Coverage Limits

DED Deductible | Misc. | Discounts/Surcharges | Liability

Select the appropriate deductible option for this coverage item.
Hint: Type Ctrl+A to copy the current value to all companies.

Boat Deductible for ...

Hamilton Township Mutual	<input checked="" type="radio"/> 500 <input type="radio"/> 1000	<input type="checkbox"/> <input type="checkbox"/>
Kent & Essex Mutual Ins	<input checked="" type="radio"/> 500 <input type="radio"/> 1000 <input type="radio"/> 2000	<input type="checkbox"/> <input type="checkbox"/>
Portage Mutual	<input checked="" type="radio"/> 100	<input type="checkbox"/> <input type="checkbox"/>

Motor Deductible for ...

Hamilton Township Mutual	<input checked="" type="radio"/> 500 <input type="radio"/> 1000	<input type="checkbox"/> <input type="checkbox"/>
Kent & Essex Mutual Ins	<input checked="" type="radio"/> 500 <input type="radio"/> 1000 <input type="radio"/> 2000	<input type="checkbox"/> <input type="checkbox"/>
Portage Mutual	<input checked="" type="radio"/> 100	<input type="checkbox"/> <input type="checkbox"/>

- For the revised IntelliQuote, the new fields will display as follows (see Figure 1.4):
(Figure 1.4)

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

- Underwriting Details** (highlighted in red)
- Enter the General Details for this coverage item.
 - Rented to Others: No
 - Boat Appraisal Date: 06/01/2020
 - Motor Appraisal Date: 06/05/2020
- Valuation Method for ...** (highlighted in red)
 - Hamilton Township Mutual: Valued Basis
 - Kent & Essex Mutual Ins: Actual Cash Value
- Enter the replacement value of this item.
 - Replacement: 15000
 - Boat Coverage: 10000
 - Motor Coverage: 5000
- Boat Coverage Type for ...** (highlighted in red)
 - Hamilton Township Mutual: Comprehensive
 - Kent & Essex Mutual Ins: All Risk
 - Portage Mutual: All Risk
- Motor Coverage Type for ...** (highlighted in red)
 - Hamilton Township Mutual: Comprehensive
 - Kent & Essex Mutual Ins: All Risk
 - Portage Mutual: All Risk
- Boat Deductible for ...** (highlighted in red)
 - Hamilton Township Mutual: 500
 - Kent & Essex Mutual Ins: 500, 1000, 2000
 - Portage Mutual: 100
- Motor Deductible for ...** (highlighted in red)
 - Hamilton Township Mutual: 500
 - Kent & Essex Mutual Ins: 500, 1000, 2000
 - Portage Mutual: 100

Legend:
■ = Used for Rating
■ = Used for 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)

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