



18 November 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. [Important Security Updates](#) – Recently, important updates were added to further improve the security of daily quoting and data transmission. As a result of the update provided 11/17/2020, all users will be required to update their client using the provided TBW Update Utility.
2. [New Fields on Binding Requirements Tab \(TUW\)](#) – For our TUW users, new fields have been added to the Binding Requirements tab to add a category and applicable policy codes.

1. Important Security Updates

Recently, important updates were added to further improve the security of daily quoting and data transmission. These improvements will enhance the existing protections in place and provide increased safety for daily policy operations.


As a result of the update provided 11/17/2020, all users will be required to update their client using the provided TBW Update Utility. This will provide more secure channels for policy operations and will supply appropriate credentials for sending and receiving data on our servers.

Please update your client as soon as possible to receive these important updates.

2. New Fields on Binding Requirements Tab (TUW)

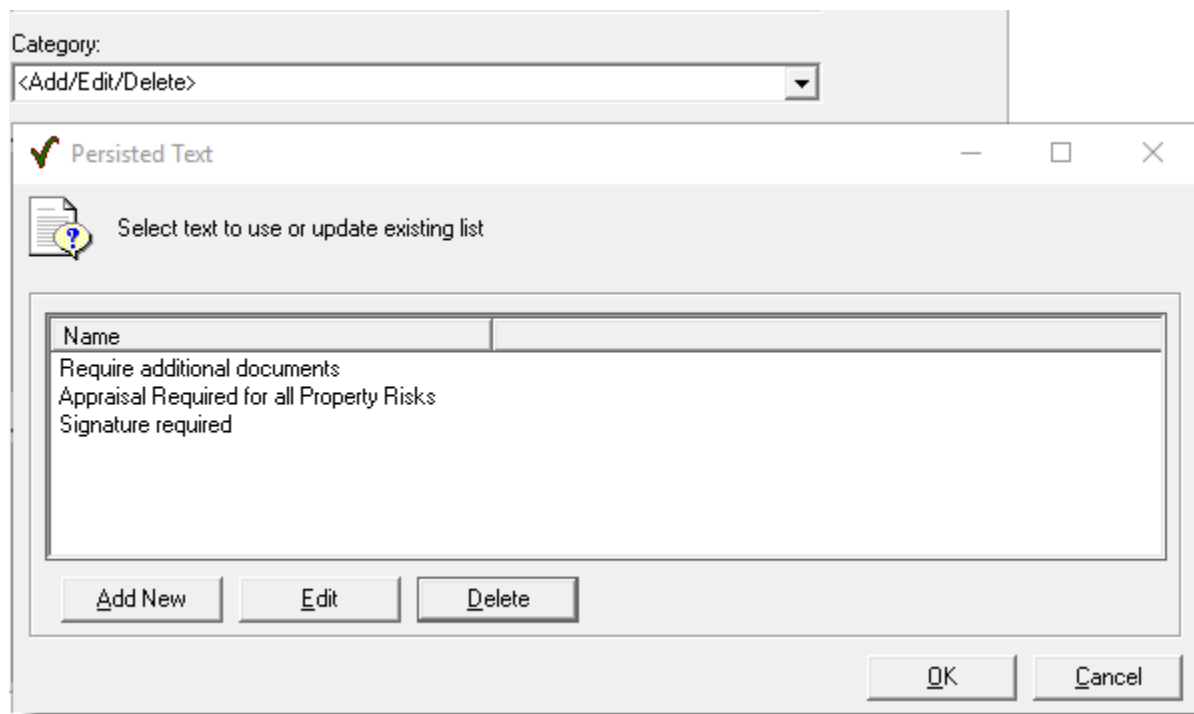
New fields have been added to the Binding Requirements tab in TUW to add a category and applicable policy codes.

Previously in TUW, users could add a Binding Requirement to be selected and printed on Quote documents. Now, with the additional options to add a Category and Policy Codes to each Binding Requirement, it will be easier for users to sort, find, and select the Binding Requirements to add onto a Quotation document.

To add a Category to existing Binding Requirements in IntelliQuote, click on the IQ Quote/Dec Details button. 

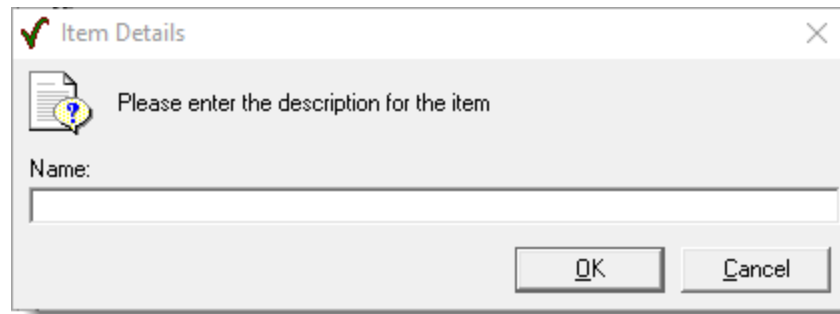
Go to the Binding Requirements tab. Select the Binding Requirement and click the **Edit** button or double click to open the Binding Requirement window. In the Category field, click the drop-down arrow and select **<Add/Edit/Delete>** to open the Persisted Text window (see Figure 2.1).

(Figure 2.1)



Click **Add New**. In the Item Details pop-up, enter a description for the Category and click OK (see Figure 2.2). Repeat this step to add additional Categories.

(Figure 2.2)



Click OK again to close the Persisted Text window.

To select a Category for a Binding Requirement, click on it in the Category field options list.

To select applicable Policy Codes that correspond to the Binding Requirement, add a check mark to each one in the Applicable Policy Codes section (see Figure 2.3).

- Remove applicable Policy Codes by deselecting the Policy Code to remove the check mark.

(Figure 2.3)

Click OK to save the Binding Requirement. Each Binding Requirement will display in the Binding Requirements tab (see Figure 2.4).

- Click on any Column to sort by that Column.

(Figure 2.4)

Coverage Item Properties - IQ Details

Quote/Dec Details | Binding Requirements | Other Details | Wordings | Misc. | Additional Named Insured(s)

Select the appropriate binding requirements for this document.

Enabled/Name	Description	Category	Policy Code
<input type="checkbox"/> Binding req 1	Quote bind request must be completed and signed before Policy issues.	Signature required	CONDO, RES, VACAN...
<input type="checkbox"/> Building appraisal required	Appraisal required in order to provide Replacement Cost	Appraisal Required for ...	BOIL, CNP, CONDO, H...
<input type="checkbox"/> Confirmation of no losses	Subject to written confirmation of no known or reported losses	Require additional docu...	AUTO, BOIL, CFC, CLI...
<input type="checkbox"/> D & D condition	D & D condition	Signature required	D&D

To edit a Binding Requirement Category, click on the Binding Requirement in the Binding Requirement tab and click **View/Edit** or double click. In the Category field, click **<Add/Edit/Delete>** to open the Persisted Text window (see Figure 2.5). Select the Category and click **Edit**, make any changes, and click OK.

(Figure 2.5)



To delete a Binding Requirement Category, click on the Binding Requirement in the Binding Requirement tab and click **View/Edit** or double click. In the Category field, click **<Add/Edit/Delete>** to open the Persisted Text window. Select the Category and click **Delete** to remove the Category from the Persisted Text list.

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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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