

28 October 2021

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

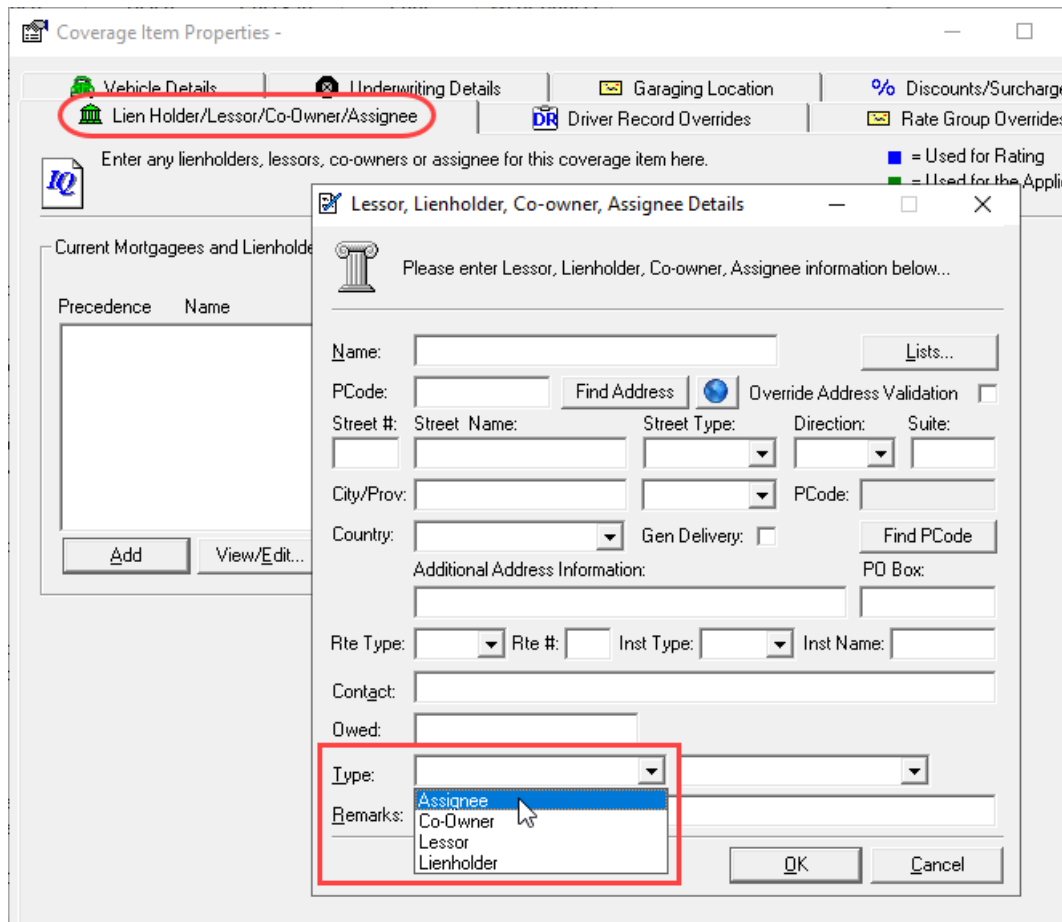
1. [Assignee Type Option in Mortgagees Form \(AB Auto\)](#) – For Auto policies in the Alberta region, an additional option – “Assignee” – is now available in the Type menu in the Mortgagees form.

1. Assignee Type Option in Mortgagees Form (AB Auto)

For Auto policies in the Alberta region, an additional Mortgagee Type option – “Assignee” – is now available in Coverage Item Properties for the vehicle.

When you are adding or editing a vehicle in an Auto IntelliQuote, select the Lien Holder/Lessor/Co-owner/Assignee tab in Coverage Item Properties. The new **Assignee** option can be selected in the Type menu in the Lessor/Lienholder/Co-owner/Assignee Details form when you are adding or modifying an item (see Figure 1.1).

(Figure 1.1)



The new Assignee Type is only available for Auto policies and currently only in the Alberta region. The Assignee Type option will not show in the Mortgagees form for other policy types or other regions.

Please note that the new Assignee Type option is not available for TUW/commercial.

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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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