



22 December 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

[Economical Insurance Now Displays As Definity Insurance Company](#) – In response to recent changes with Economical Insurance, Applications and Pink Cards in TBW have been updated to replace occurrences of “Economical” and “Economical Mutual Insurance Company” with “Definity Insurance Company.”

Economical Insurance Now Displays As Definity Insurance Company

In response to recent changes with Economical Insurance, Applications and Pink Cards in TBW have been updated to replace occurrences of “Economical” and “Economical Mutual Insurance Company” with “Definity Insurance Company.” This change applies in all applicable regions (AB, NB, NS, ON, and PEI).

When you create an Application for any policy type, the updated name will show in the Insurance Company field (see Figure 1.1).

(Figure 1.1)

The screenshot shows a software interface for 'CSIO HABITATIONAL INSURANCE'. A red box highlights the 'INSURANCE COMPANY' field, which contains 'Definity Insurance Company'. To the right of this field are checkboxes for 'Quote', 'New' (which is checked), and 'Renewal'. Below this is a table with two columns: '1. APPLICANT'S FULL NAME AND POSTAL ADDRESS' and '2. BROKER'S'. The 'APPLICANT'S' column has fields for 'NAME' (Anne Test) and 'ADDRESS'. The 'BROKER'S' column has fields for 'NAME' and 'ADDRESS'.

You will also notice the name change when you create a Pink Card for an Auto policy (see Figure 1.2).

(Figure 1.2)

The screenshot shows a window titled 'Pink Cards'. Under the 'Details:' section, there is a 'Company Name:' dropdown menu with 'Definity Insurance Company' selected. Below it are fields for 'Company Address:', 'Binder:', 'Effective Date:' (set to 11/29/2021), and 'Expiry Date:' (set to 11/29/2022). The date format is indicated as MM/DD/YYYY.

In the Attention pop-up that may appear when you create an Application, “Economical Insurance Company (Group)” will now show, rather than “Economical Mutual Insurance Company (Group)” (see Figure 1.3).

(Figure 1.3)

The screenshot shows an 'Attention' dialog box with an information icon and the text: 'Select the company you would like to create this application for.' There are two radio button options: 'Economical' and 'Economical Insurance Company (Group)'. The second option is selected and highlighted with a red box. 'OK' and 'Cancel' buttons are on the right.

In other areas in TBW, the name “Economical” will continue to display.

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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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