



9 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

1. [Improved Address Forms](#) – Improvements have been made to Address forms in TBW/TUW, and you will notice slight changes to the display wherever an address is entered or shown in the program.

1. Improved Address Forms

Improvements have been made to Address forms in TBW/TUW. You will notice slight changes to the display wherever an address is entered or shown in the program (e.g. in folders, IntelliQuote, TBW/TUW Lists, Persons, Mortgagees, and Claims).

- **Note: User workflows and program functionality have not changed with this enhancement.** Please continue to enter or modify addresses in the usual way.

Note that the appearance of Address forms has changed somewhat (see Figure 1.1).

(Figure 1.1)

Folder Details | Persons | Claims | Documents | Current Policies | Ledger Card | Abeyance | Activities | Client Info

Insured Names (1 & 2) and Mailing Address

Insureds: John Test Jane Test Org:

PCode: R3M 2T1 Find Address Override Address Validation

Street #: 123 Street Name: Any Street Type: St Street Direction: Suite:

City/Prov: Anytown MB PCode: R3M 2T1 Country: Canada

Additional Address Information: PO Box: Find PCode

Rte Type: Rte #: Inst Type: Inst Name: Gen. Del.

Other: 204.555.5555 Attention: John And Jane Test Classification

With this enhancement, appropriate address fields will now be available for the United Kingdom and some other foreign countries (see Figure 1.2).

(Figure 1.2)

Folder Details | Persons | Claims | Documents | Current Policies | Ledger Card | Abeyance | Activities | Client Info

Insured Names (1 & 2) and Mailing Address

Insureds: Testing Org:

Sub Building Name: Building Name: Bld Number:

Thoroughfare: Dependent Thoroughfare:

Dependent Locality: Double Dependent Locality:

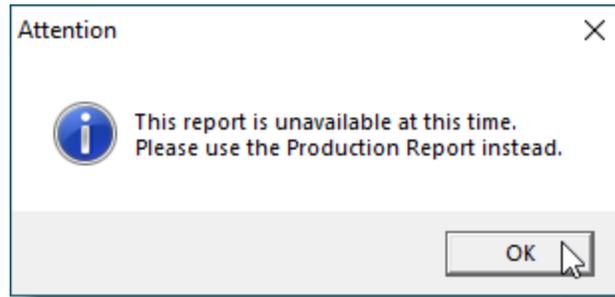
Post Town: Westminster PO Box: Post Code: Country: United Kingdom

Other: Home Phone: Attention: Classification

With these improvements to addressing in TBW/TUW, two older reports (the Client Transactions report and the Policy Details report) are no longer available. If you attempt to access either of these reports in the Reports menu, an Attention pop-up will display to direct you to the appropriate report to use instead (see Figure 1.3).

- Please contact Client Services with any questions you have about reports in TBW/TUW.

(Figure 1.3)



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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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