

10 September 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*

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1. [Printed Client Receipt Shows Policy on Single Line](#) – When a client receipt is printed with Print & Post or Insta-Posit, each policy transaction will show on one line, with the premium and any fees and taxes included in the amount.
2. [Broker Statement Logo and Header Details by ABD](#) – When Broker Statements are printed, the logo and header details can be customized according to the ABD (Agency-Branch-Department) selected for the Broker in TBW/TUW Lists.
3. [Save and Reuse Subscription Templates \(TUW\)](#) – The timesaving Subscription Templates feature can be used to save and reuse sets of subscribers used on a regular basis in TUW IntelliQuote.
4. [Additional Options for Copying Coverage Details \(TUW\)](#) – When an additional company is enabled in a new or existing IntelliQuote, the Copy Coverage Details pop-up allows you to select where coverage details will be copied from.
5. [Delete/Delete All on Operations Tab \(TUW\)](#) – The Operations tab in Coverage Item Properties has been improved with the addition of Delete and Delete All buttons, allowing you to delete one or all operations quickly and easily.

6. [View Change Amount in Policy Fees Form in Cancellation Request \(TUW\)](#) – When you are creating a Cancellation Request in TUW, the return amount for applicable policy fees will display in the Change Amount column in the Policy Fees form.
7. [ABD Column for Quote Sheet Filter on Documents Tab in Broker Folder \(TUW\)](#) – In a Broker folder, the Documents tab in Folder Details has been improved with an ABD column when the Quote Sheet filter is applied.
8. [Filter Bordereaux Report Results by ABD \(TUW\)](#) – When generating a Bordereaux Report, you can select to view results for all or a selected ABD (according to User Rights).

## 1. Printed Client Receipt Shows Policy on Single Line

Previously, when a client receipt was printed using the Print & Post or Insta-Posit option, the printed receipt showed a policy transaction on multiple lines, with details for the premium and any fees and/or taxes displayed on separate lines (as applicable).

Now, when a client receipt is printed with Print & Post or Insta-Posit, each policy transaction will show on one line, with the premium and any fees and taxes included in the amount (see Figure 1.1).

(Figure 1.1)

PHONE: 204-555-1234  
FAX: 204-555-1313

**RECEIPT**

**RECEIVED FROM:**

John Test Jane Test  
140 Any St  
Anytown MB R3M 2T1

Account	TESTJ01
Policy	
Receipt	43
Date	Sep 07, 2021
Page	1

**Account Executive**

Test Agency Ltd.

**Account Representative**

Annie Cameron

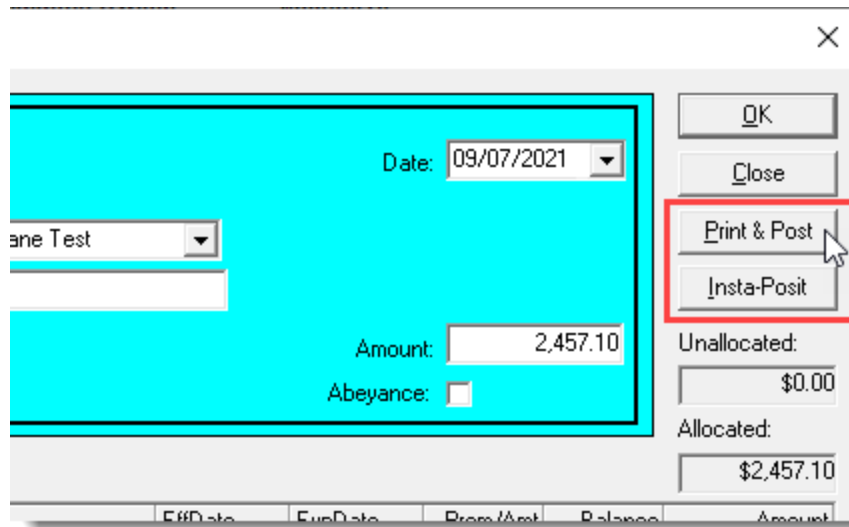
<b>Insured's Name</b>		<b>Memo</b>	
John Test Jane Test		Payment TestHome 1234 Test MH 123	

Trans Type	Effective	Company	Description	Paid
New Policy	Sep 09 2021	AAA Test	New Policy Test (TestMH 123)	\$1,257.10
New Policy	Sep 30 2021	AAA Test	New Policy Test (TestHome 1234)	\$1,200.00

Each policy shows on a single line

To view this improvement, create a Receipt of Payment for a client folder in the usual way. When details have been entered in the Receipt of Payment form, click the **Print & Post** or **Insta-Posit** button (see Figure 1.2).

(Figure 1.2)



- For Instaposit, click **Yes** in the Attention pop-up to print the receipt.

In the Print Preview window, note that each policy transaction shows on a single line. Review receipt details and then print the receipt.

[Return to Contents](#)

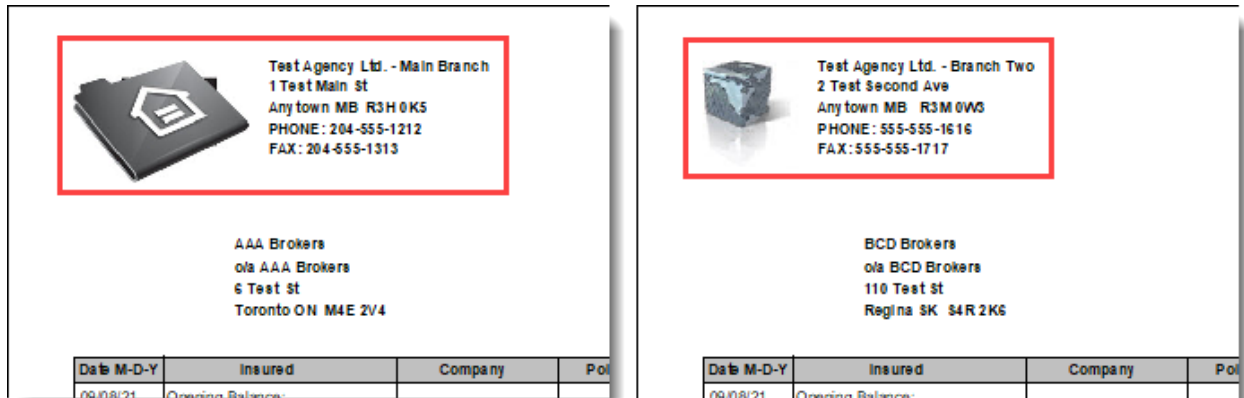
## 2. Broker Statement Logo and Header Details by ABD

When Broker Statements are printed, the logo and header details can be customized according to the ABD (Agency-Branch-Department) selected for the Broker in TBW/TUW Lists. This feature will be beneficial for users with different logos, presentation names, and/or address information for the various ABDs in their organization.

**Note:** This new feature is available via a switch. Please contact Client Services for assistance in setting up unique logos for different ABDs.

To print Broker Statements on The Accountant's Desktop, double-click Accounts Receivable in the Accounting Tree and click the Statements tab at the bottom of the screen. In the Print AR Statements form, select applicable criteria, ensuring **Sub-Brokers** is selected in the Process Statements For section. Click the **Process** button. Select the statements to be printed and click the **Print** button. When statements are printed, note that the logo and header details for the applicable ABD will display (see Figure 2.1).

(Figure 2.1)



A Broker Statement can also be printed from the Broker folder. In Folder Details, select the Ledger Card tab. Right-click a transaction and select **Print Statement**. In the Print AR Statement form, enter required details and click **Print**. Note that the logo and header details for the corresponding ABD will display in the printed statement.

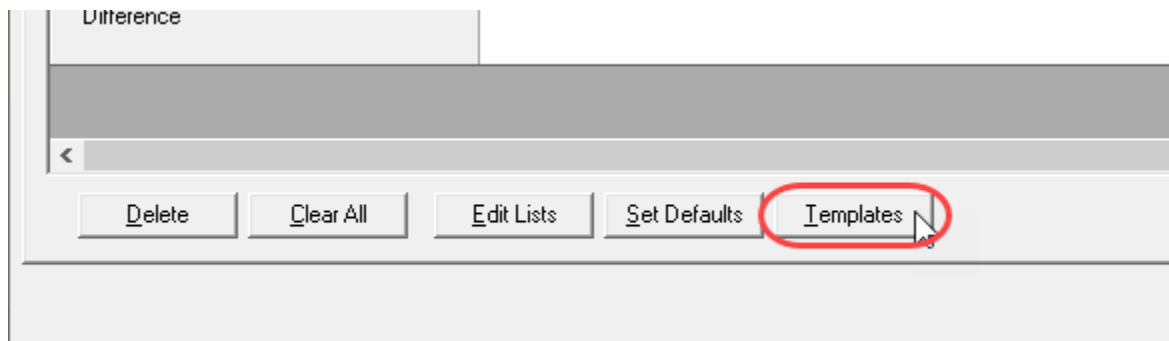
[Return to Contents](#)

### 3. Save and Reuse Subscription Templates (TUW)

The timesaving Subscription Templates feature can be used to save and reuse sets of subscribers used on a regular basis in TUW IntelliQuote. Rather than having to enter subscription details from scratch each time, you can use a template to load saved details automatically into the Subscriptions screen.

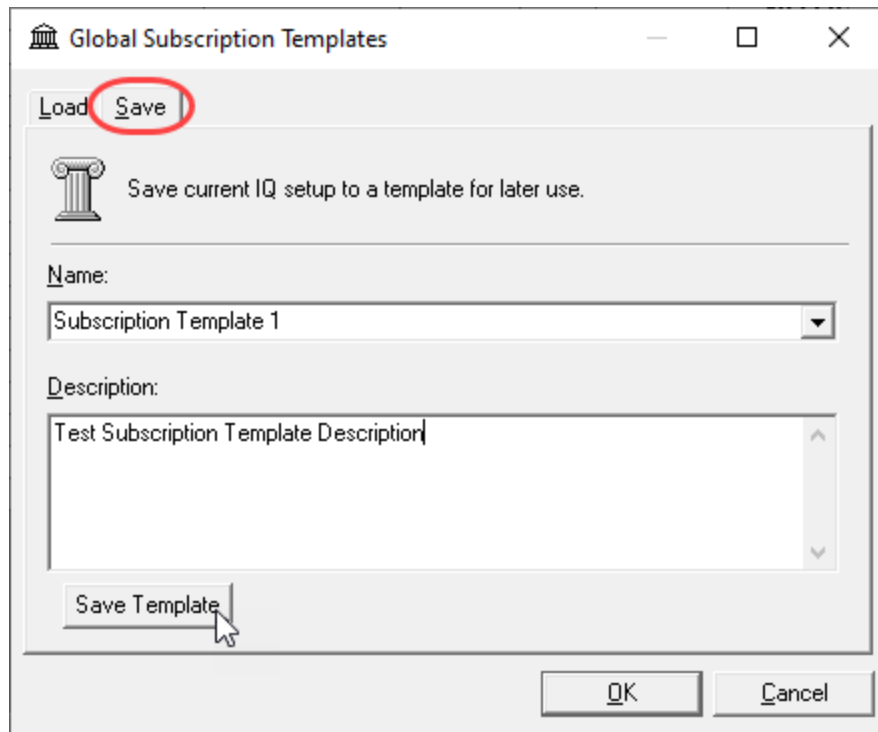
To save a subscription template, complete the subscription with all fields populated in the Subscriptions form in the IntelliQuote. Then, click the **Templates** button at the bottom of the window (see Figure 3.1).

(Figure 3.1)



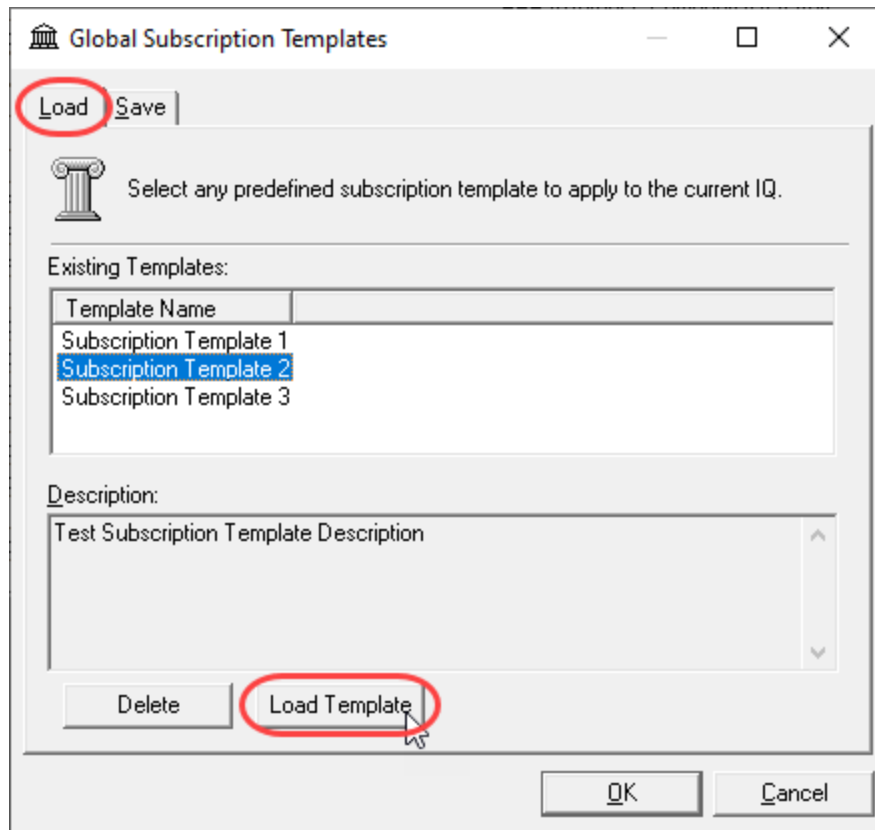
In the Global Subscription Templates form, select the **Save** tab. Enter a **Name** and **Description** for the template and click the **Save Template** button (see Figure 3.2). Click OK in the Attention pop-up and click OK in the Global Subscription Templates form.

(Figure 3.2)



To apply a saved subscription template in the IQ Subscriptions screen, click the Templates button. If multiple companies are enabled in the IQ, select the applicable company in the **Company Selection** pop-up and click OK. On the **Load** tab, select the template you want to apply from the Existing Templates list, and click the **Load Template** button (see Figure 3.3). The subscription setup in the template will populate the Subscriptions form in IQ.

(Figure 3.3)



When you are saving a new subscription template, you can enter the name and description from scratch or base its details on an existing template. To use details from another template, select the existing template in the **Name** menu on the **Save** tab, modify Name and Description details as appropriate for the new template, and click Save Template.

To modify a template Description, select the template in the Name menu on the Save tab. Edit the Description as needed and click Save Template.

If a saved subscription template is no longer needed, it can be deleted from the **Load** tab by selecting the template and clicking the **Delete** button. Click Yes in the Attention pop-up to delete the selected template.

**Note:** The original **Set Defaults** button is still enabled and will allow a user to set up a main default that will load upon entering the Subscriptions screen from the Summary Report IQ view.

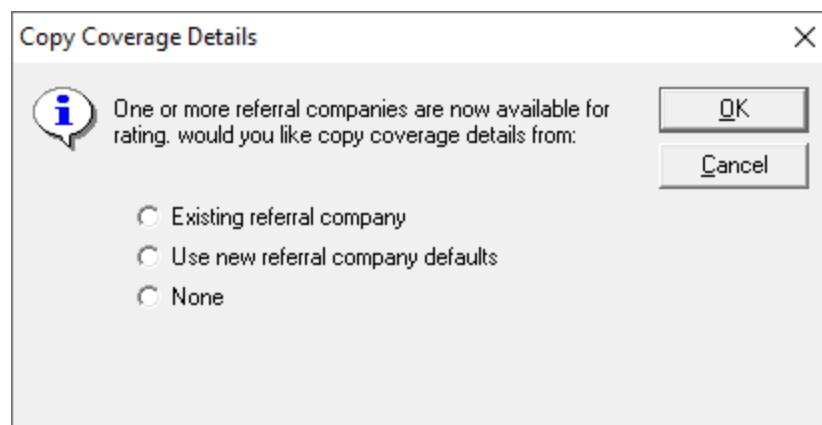
[Return to Contents](#)

## 4. Additional Options for Copying Coverage Details (TUW)

When an additional company is enabled in a new or existing IntelliQuote, the **Copy Coverage Details** pop-up will display, allowing you to select where coverage details will be copied from (see Figure 4.1). Select the applicable option and click OK.

- Select “Existing referral company” to copy coverage details as entered for an existing referral company. With this option, you will be prompted to select which company to copy coverage details from.
- Select “Use new referral company defaults” to copy default values from the Rating Definition for the company being added.
- Select “None” if you do not want to copy defaults for the newly added company.

(Figure 4.1)



If more than one company is added to the IQ at one time, the selection in the Copy Coverage Details pop-up will apply to all. If you would like to select a different option for each additional company enabled, please add the companies one at a time and make the appropriate selection for each in the Copy Coverage Details pop-up.

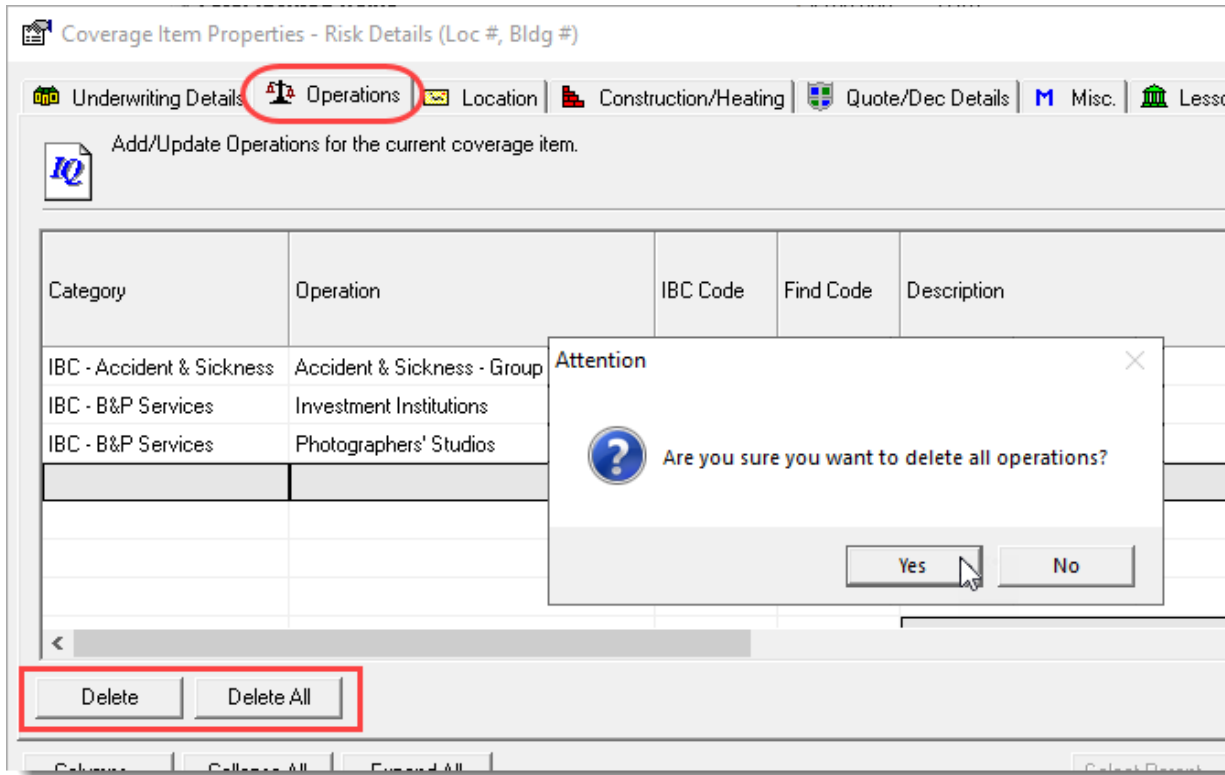
[Return to Contents](#)

## 5. Delete/Delete All on Operations Tab (TUW)

For our TUW users, the Operations tab in Coverage Item Properties has been improved with the addition of Delete and Delete All buttons, allowing you to delete one or all operations quickly and easily.

In TUW IntelliQuote, select the **Operations** tab in Coverage Item Properties (the following example shows Coverage Item Properties – Risk Details). To delete a single operation, click in the row and then click the **Delete** button. To delete all items at once, click the **Delete All** button. Click Yes in the Attention pop-up to delete the operation(s) (see Figure 5.1).

(Figure 5.1)



Note that you can still use the Delete key on your keyboard to delete a selected operation, if desired.

[Return to Contents](#)

## 6. View Change Amount in Policy Fees Form in Cancellation Request (TUW)

When you are creating a Cancellation Request in TUW, the return amount for applicable policy fees will display in the Change Amount column in the Policy Fees form. Click the **Fees** button in the Cancellation Request window to open the Policy Fees form. In the **Change Amount** column, view the return amount for applicable policy fees (see Figure 6.1). The change amount is calculated based on the policy Effective Date and Cancellation Method.



(Figure 6.1)

Company/Contract/Policy Code	Fee Code	Type	Amount	Change Amount
AAA/AAA testcontract1/COMMPROP	FEE4	Retained	(\$150.00)	(\$43.00)
AAA/AAA testcontract1/COMMPROP	FEE5	Retained	(\$329.00)	(\$93.00)

Buttons: Clear All, Clear Data, Edit List

Total Flowthrough Fees: \$0.00

The change amount for policy fees can also be viewed on the Billing Details tab when the Cancellation Request is open in the TUW Document Window (see Figure 6.2).

(Figure 6.2)

Billing type:	Broker Bill - Net
Upload Status:	Not Sent
Transaction Status:	N/A
Return Premium:	(\$658.00)
Term Premium:	\$770.00
Annual Premium:	\$770.00
Policy Commission:	\$0.00
Policy Commission %:	0.00%
Total Amount Billed:	(\$608.00)
<b>± Premium Breakdown:</b>	
<b>[-] Fees:</b>	
[-] AAA Insurance Company/AAA testcontract1	
FEE4 - Test Policy Fee 4	(\$43.00)
[-] AAA Insurance Company/AAA testcontract1	
FEE5 - Test Policy Fee 5	(\$93.00)
<b>[-] Sales Taxes:</b>	
<b>± Underwriters &amp; CSRs/Type/Level:</b>	
<b>± Sub Broker:</b>	

Navigation: < Billing Details / BW Coverages / Alerts / CSIO Static View / Company Memo >

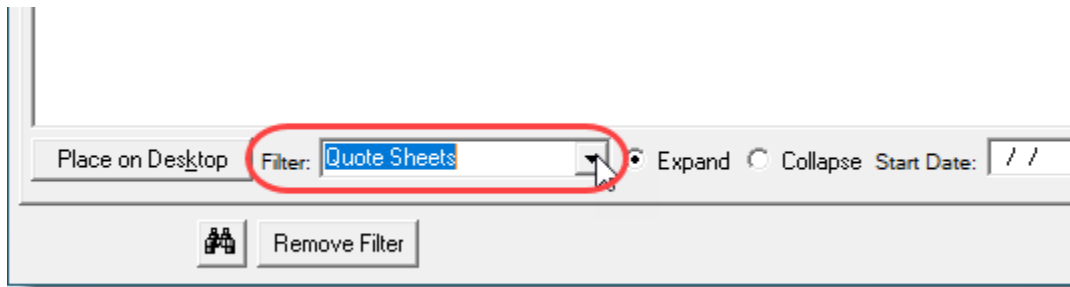
[Return to Contents](#)

## 7. ABD Column for Quote Sheet Filter on Documents Tab in Broker Folder (TUW)

In a Broker folder, the Documents tab in Folder Details has been improved with an ABD (Agency-Branch-Department) column when the Quote Sheet filter is applied.

To view the new ABD column, open Folder Details for a Broker folder and select the **Quote Sheets** Filter on the **Documents** tab (see Figure 7.1).

(Figure 7.1)



The Documents tab will reload to display only Quote Sheets. Note the new **ABD column**, which will display the Agency-Branch-Department for the Quote (see Figure 7.2).

(Figure 7.2)

Name	Client Folder	Checked Out	Insured Name	Created	Created By	Status	ABD
Quote - Testing Quote	TESTP44	No	Test Test	Jul 09, 2020	Administrator	N/A	1-1-1
Quote - Testing Quote	TESTP41	No	Test Test	Jul 13, 2020	Administrator	N/A	1-1-1
Quote - Testing Quote	TESTP04	No	Test Test	Dec 09, 2020	Administrator	N/A	1-1-1
Quote - Testing Quote	TESTP29	No	Test Test	Dec 10, 2020	Administrator	N/A	1-1-1
Quote - Testing Quote	TESTP94	No	Test Test	Dec 10, 2020	Administrator	N/A	1-1-1
Quote - Testing Quote	TESTP04	No	Test Test	Dec 10, 2020	Administrator	N/A	1-1-1

[Return to Contents](#)

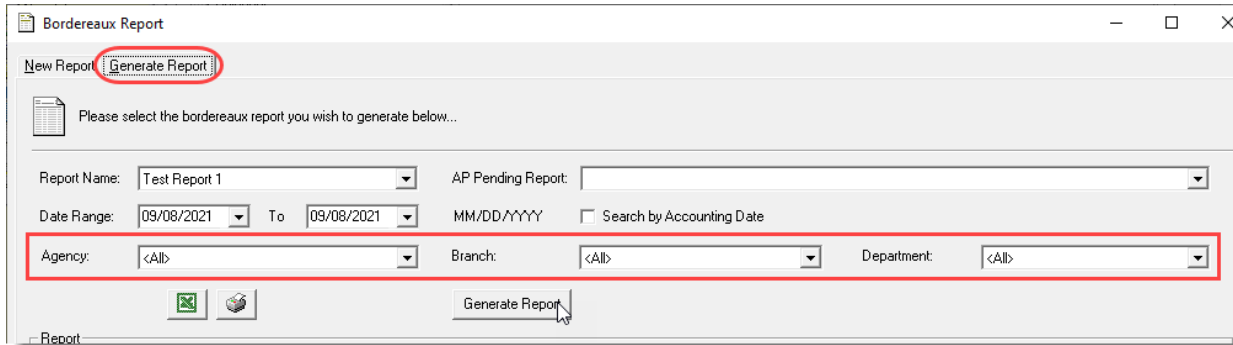
## 8. Filter Bordereaux Report Results by ABD (TUW)

The Bordereaux Report has been enhanced with the ability to filter report results by ABD (Agency-Branch-Department). When generating a Bordereaux Report, you can select to view results for all ABDs or a selected ABD.

To generate a Bordereaux Report, click **Reports, Bordereaux Report**. On the Generate Report tab, enter report parameters. In the Agency, Branch, and Department menus, select All or a specific ABD (see

Figure 8.1). Click the Generate Report button to view report results for the selected ABD(s) in the Report section below.

(Figure 8.1)

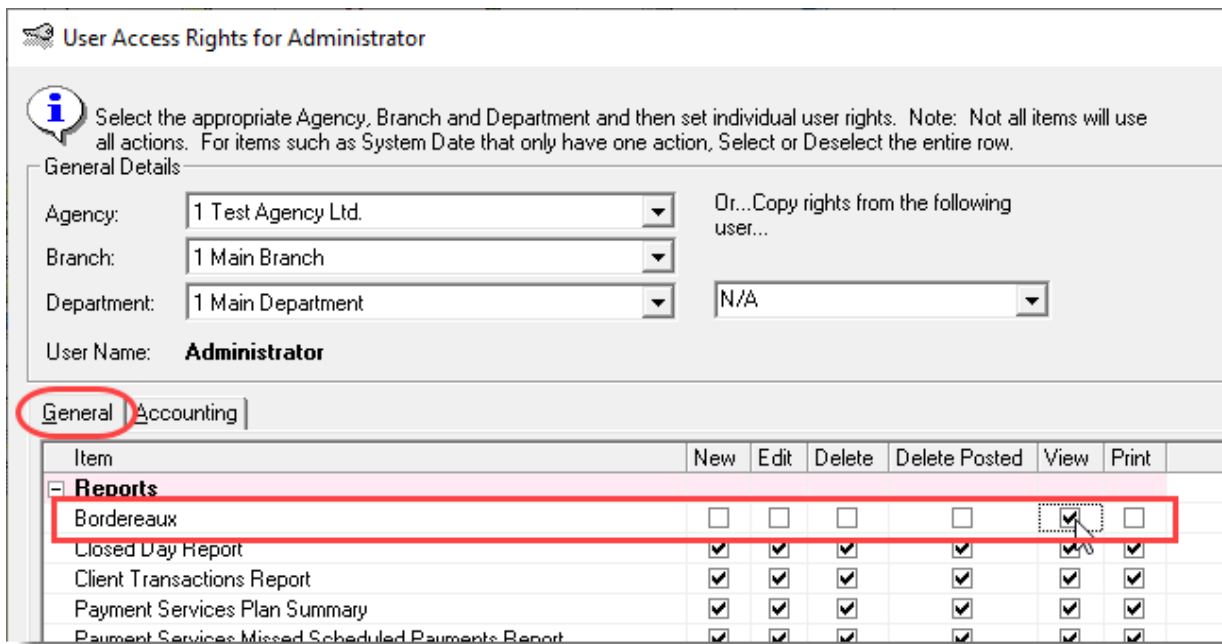


Please note, the ability to view Bordereaux Report results by ABD is managed by User Rights. When a Bordereaux Report is generated, results will include only policy data where the Policy ABD assignment matches an ABD for which the user has Bordereaux User Rights.

To assign User Rights for Bordereaux, click **Tools, Administrative, User Manager**. In the User Level Access Rights window, select the User and click the **Rights** button. On the General tab in the User Access Rights window, choose the **ABD**. In the Reports section, assign the **View User Right** for **Bordereaux** (see Figure 8.2).

- Enabling the View User Right will allow this user to view Bordereaux Report results for the selected ABD.

(Figure 8.2)



Click OK in the User Access Rights window to save these rights for this user for this ABD, and then click OK in the Attention pop-up.

If required, assign Bordereaux User Rights for additional ABDs for this user, *or*, to apply the selected rights for Bordereaux to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu.

Click Close in the User Access Rights window.

Repeat these steps for each additional TUW user requiring User Rights for Bordereaux.

[Return to Contents](#)

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](mailto: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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