

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)**:

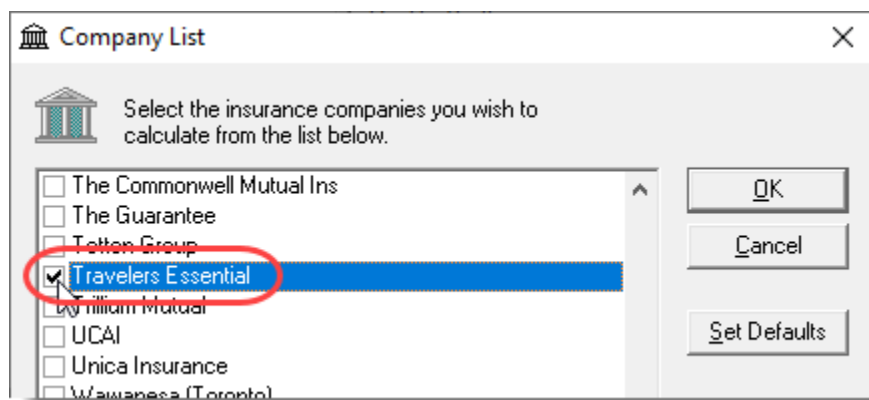
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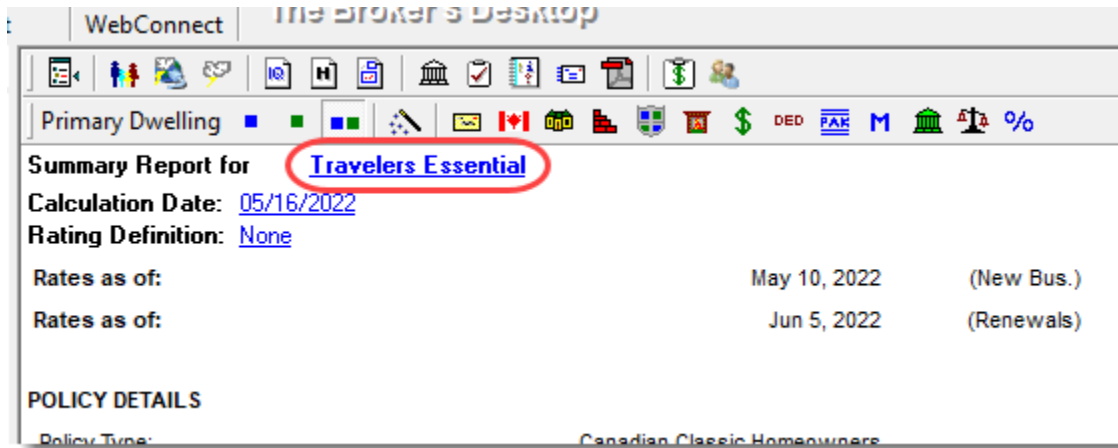
[Chieftain is Now Travelers Essential](#) – Chieftain will now be known as “Travelers Essential.”

The TBW/TUW interface has been updated to reflect this change. Please follow the steps provided to ensure your system is set up properly for the change from Chieftain to Travelers Essential.

Chieftain is Now Travelers Essential

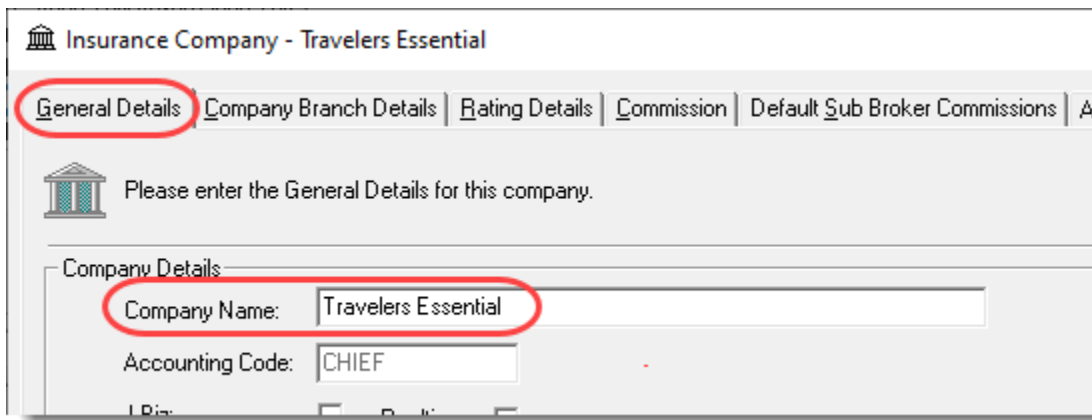
Chieftain will now be known as “Travelers Essential.” In response to this change, the TBW/TUW interface has been updated to replace occurrences of “Chieftain” with “Travelers Essential” in most locations, such as the **Company List** and **IntelliQuote**.





To ensure your system is set up properly for the change from Chieftain to Travelers Essential, please follow these steps:

1. Change the company name from “Chieftain” to “Travelers Essential” in TBW/TUW Lists.
 - a. Click **Lists, Insurance Companies**.
 - b. In the Lists window, select **Chieftain** and click the **View/Edit** button.
 - c. On the General Details tab in the Insurance Company window, change the **Company Name** from Chieftain to Travelers Essential.



2. Also on the General Details tab, ensure Travelers Essential is selected for **Rating Engine** and **CSIO Carrier**.

3. Next, delete all Chieftain Rating Engines as follows.
 - a. Still in the Insurance Company window, select the **Rating Details** tab.
 - b. To delete a Chieftain Rating Engine, select it and click the **Delete** button.

Rating Engine	Region	Policy Type	Servicing Ca...	Quote Sheet	CSIO Carrier
Chieftain	Ontario	Home			
Chieftain	Ontario	Auto			
Chieftain	Ontario	Tenant			
Chieftain	Ontario	Condo			

- c. Click **Yes** in the Attention pop-up to delete the item.
 - d. Repeat these steps to delete all other Chieftain Rating Engines.
4. Add Travelers Essential Rating Engines (these are required for Application Upload).
 - a. On the Rating Details tab, click the **Add** button in the Rating Details section.
 - b. In the **Rating Details** form,
 - i. Select **Ontario** in the Region drop-down list.
 - ii. For Policy Type, select **Auto**.
 - iii. For Rating Engine, select **Travelers Essential**.
 - iv. Select **Travelers Essential** in the CSIO Carrier menu.
 - v. Click OK.

Rating Details [X]

Please enter the Rating Details below...

Region: [Ontario] [v]

Policy Type: [Auto] [v]

Rating Engine: [Travelers Essential] [v]

Referral Description: []

Servicing Carrier: [] [v]

Quote Sheet: [] [v]

CSIO Carrier: [Travelers Essential] [v]

Program Name: []

[OK] [Cancel]

c. Repeat these steps to add a Travelers Essential Rating Engine for other applicable policy types (Ontario Home, Tenant, and Condo).

5. Click OK in the Insurance Company window.

Please contact Client Services if you would like assistance in making these changes in TBW/TUW.

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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.



Gold Application Development
Silver DevOps
Silver Application Integration

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