

9 February 2023

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)**:

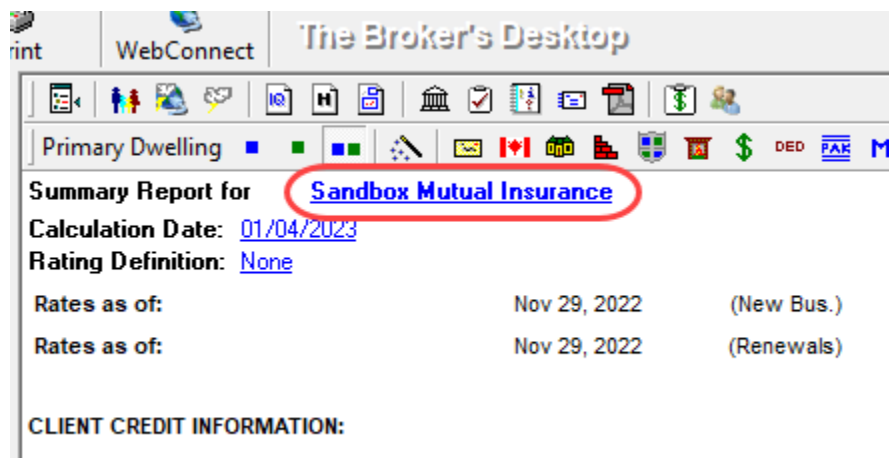
### Contents

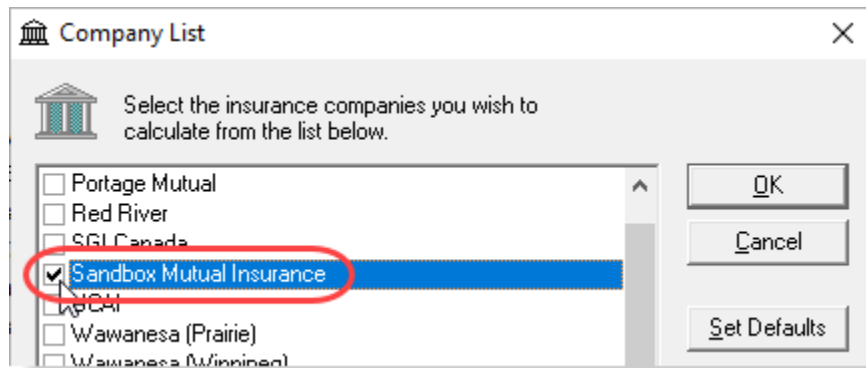
---

**SMI Is Now Sandbox Mutual Insurance** – Saskatchewan Mutual Insurance (SMI) will now be known as “Sandbox Mutual Insurance.” The TBW/TUW interface has been updated to reflect this change in most locations. **Please follow the steps provided to change the Company Name in TBW Lists.**

### SMI Is Now Sandbox Mutual Insurance

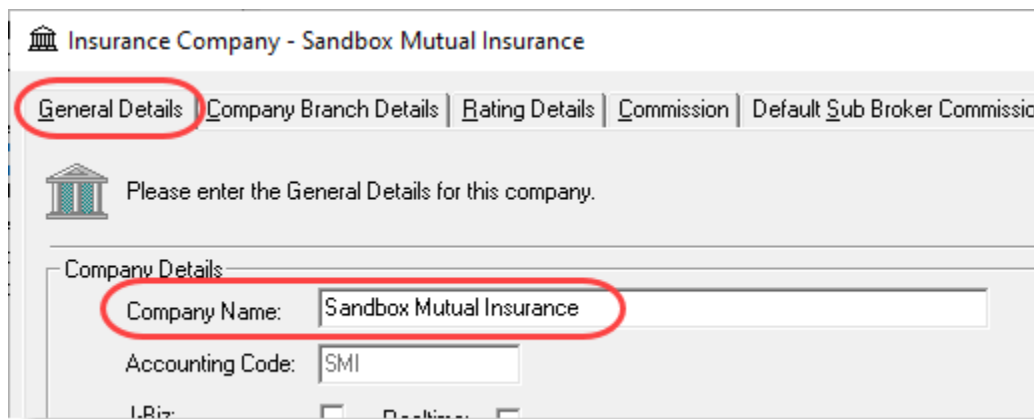
Saskatchewan Mutual Insurance (SMI) will now be known as “Sandbox Mutual Insurance.” In response to this change, the TBW/TUW interface has been updated to replace occurrences of SMI with Sandbox Mutual Insurance in most locations, such as the Company List, IntelliQuote, Credit Score form, WebConnect, the CSIO Application, and the Rating Engine in the Company window in TBW Lists.





Please change the Company Name in TBW Lists to complete setup for the change from SMI to Sandbox Mutual Insurance. To change the company name,

1. Click **Lists, Insurance Companies**.
2. In the Lists window, select **Saskatchewan Mutual Insurance** and click the **View/Edit** button.
3. On the General Details tab in the Insurance Company window, change the **Company Name** from Saskatchewan Mutual Insurance to Sandbox Mutual Insurance.
  - Note that the Accounting Code cannot be changed.



4. Click **OK** in the Company window and click **OK** in the Lists window.

Please note that SMI has not yet been changed to Sandbox Mutual Insurance in the following locations:

- The **CSIO Carrier drop-down list** in the Company window in TBW Lists: The Saskatchewan Mutual option will automatically be renamed as "Sandbox Mutual Insurance" at a later date.
  - The CSIO Carrier field is available on the General Details tab and on the Rating Details tab when you are adding or modifying an entry in the Rating Details form.

Policy Number Manager:

Rating Engines (Obsolete)

Rating Engine:

Servicing Carrier:

CSIO Carrier:

Commercial Rating:

Scotia General  
Scottish & York (formerly S&R)  
Scottish Dominion

- **Policy Inquiry attachments:** When a Policy Inquiry is performed using WebConnect, the HTML attachment's default name will be "Attachment – Saskmutual\_policyinquiry." When the file is opened in a web browser window, the original Saskatchewan Mutual Insurance name and logo will display. (These will be changed at a later date.)

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) 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.