

17 April 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

1. [IntelliQuotes No Longer Recalculated When First Opened](#) – To improve the amount of time required to open an IntelliQuote, IQs will no longer be rated when first opened in TBW.
2. [Improved Workflow for Policy Change \(Habitational and Auto Only\)](#) – The process for creating and modifying Endorsement Requests for Property and Auto policies has been revised and streamlined.

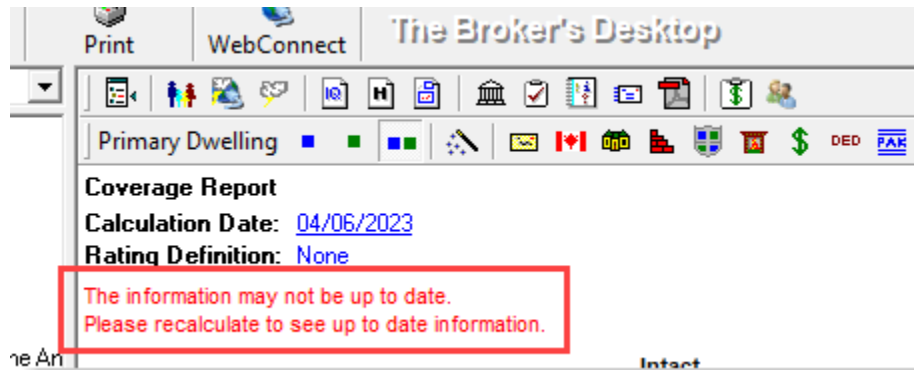
1. IntelliQuotes No Longer Recalculated When First Opened

To improve the amount of time required to open an IntelliQuote, IQs will no longer be rated when first opened in TBW. You will notice improved speed, especially when opening large IQs with several companies selected.


Check out and open a Property, Farm, or Auto IQ in the usual way. Because the IQ is not recalculated automatically when opened, **the information displayed in the IQ (premiums, alerts, etc.) will be based on how the IQ was saved the last time it was opened.** As such, the information may not be up to date. Please click the **Recalculate**  toolbar button when you are ready to recalculate the IQ in the current session.

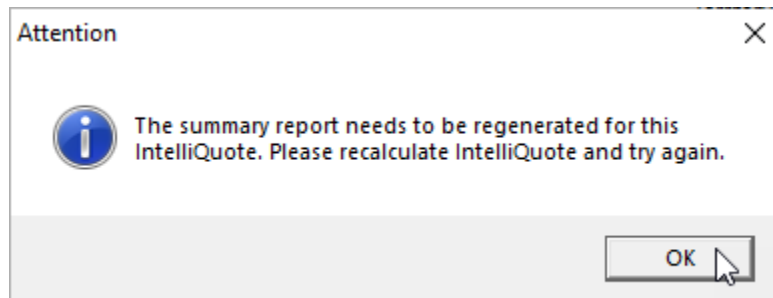
When an IQ is first opened and has not yet been recalculated, an Information Alert will display on the Coverage, Summary, Alerts, and Outline View (Auto only) tabs, stating: *“The information may not be up to date. Please recalculate to see up to date information.”*

- This Information Alert will no longer show once the IQ has been recalculated.



Please note the following when initially opening an IQ:

- If you open an IQ and recalculate it, switch to another IQ, and then return to the previous IQ, the Information Alert will display again for that IQ, indicating the information may not be up to date.
- If the IQ has not been recalculated and you click the **PDF**  button to persist it, an Attention pop-up will display, reminding you that the IQ needs to be recalculated first. After recalculating, click the PDF button again to create a PDF copy of the IQ.



Please remember to recalculate the IQ as usual after making any changes.

This feature is applicable for Property, Farm, and Auto IQs in all regions for all companies, for both manufactured and online rating.

Please note that this feature is not available on The Underwriter's Desktop.

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2. Improved Workflow for Policy Change (Habitational and Auto Only)

Creating or modifying an Endorsement Request for a Property or Auto policy is now quicker, easier, and more efficient. This program enhancement includes the following improvements to the policy change process:

- A revised, streamlined workflow that allows you to access only relevant areas in the IQ

- An enhanced toolbar on the TBW Coverages tab to make required changes quickly and easily
- Recalculation is managed by the user, rather than occurring automatically after each edit.
 - The new "Please Recalculate" text displays as a reminder when the endorsement request needs to be recalculated.
- Policy sync (applicable only to SGI CANADA Realtime) occurs automatically only on document creation and before upload. The user can perform a policy sync at any time using the Policy Sync toolbar button.
- Company and Client Memos are updated as needed from the corresponding tab with the new Regenerate Change Memo toolbar button.

Note: This streamlined workflow is available for Habitational and Auto policies (online rating and manufactured rating). Other policy types (Farm and Commercial) will continue to use the previous workflow for creating or modifying an endorsement request.

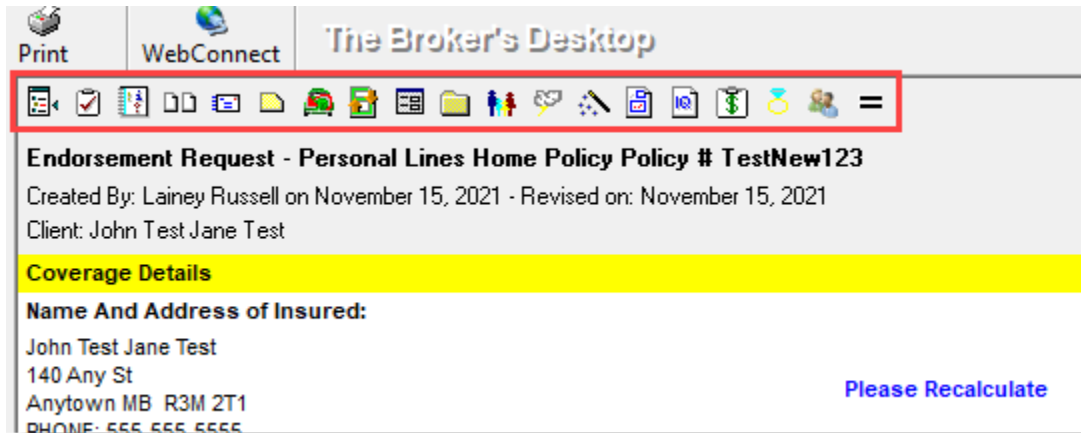
Create a New Endorsement Request


To create a new Endorsement Request,

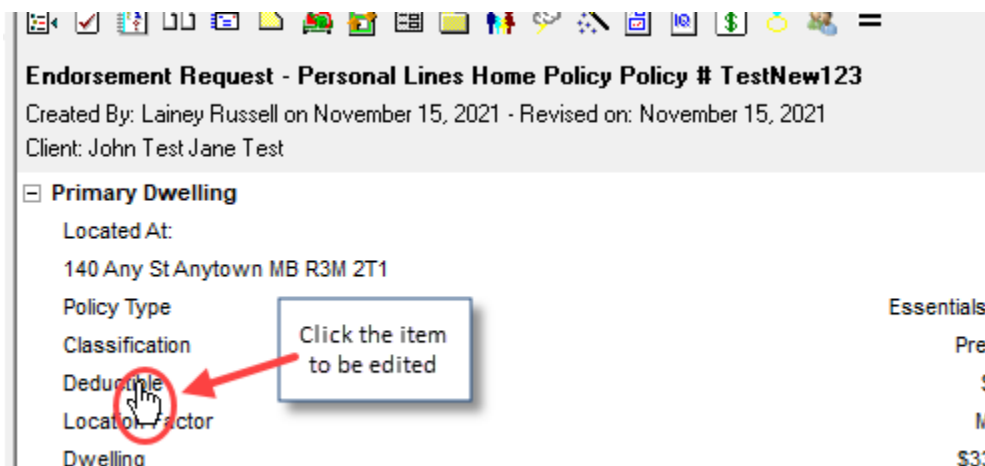
1. Drag and drop the **Endorsement Request** icon from the Policy Transactions Tray onto the existing policy transaction in the Desktop Tree.
2. In the Endorsement Request window, enter a meaningful **Description**, adjust the **Effective Date** if needed, and click **OK**.
 - You do not need to click the Coverages button in this screen (as you would have previously).

3. The Endorsement Request document will be created and show on the Desktop Tree. It will automatically open to the **TBW Coverages** tab. You can use either of the following methods to access coverages on the TBW Coverages tab:

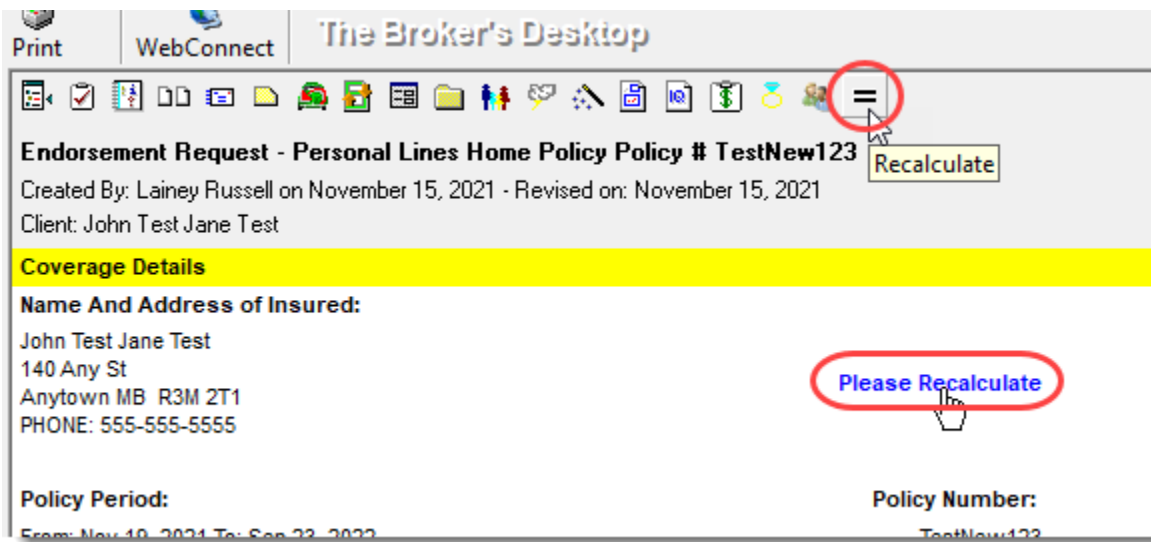
- **Use the Toolbar:** Click a toolbar button to open the corresponding window. ([Learn more below](#) about the enhanced TBW Coverages toolbar.)



- **Click the Item in Coverages View:** Find the item you wish to edit and click it (your mouse will change to a hand  for items that can be clicked). After clicking the item:
 - For certain items, **you will be taken directly to the item**, where you can make required changes.
 - E.g. If you click the Primary Dwelling “Located At” Legal Address, you will be taken directly to the Location tab in Coverage Item Properties.
 - For other items, **you will be taken to the coverage**, where you can navigate to the specific tab and field to make required changes.
 - E.g. If you click the Primary Dwelling Deductible, you will be taken to the first tab (Underwriting Details) in Coverage Item Properties. You can then select the Coverage Limits tab and make changes to the Deductible as needed.



- **Note:** Many items on the TBW Coverages tab are clickable. For example, click the Insured Address to view the Folder Details, click Policy Period From/To to open Billing Details, click a Person to open the List of People, click the Broker Note to open the Broker Notes editing form, or click an Endorsement to open Coverage Item Properties for that item.
4. When you have finished making required changes, click the **Recalculate** toolbar button or click the blue **Please Recalculate** text across from the Insureds Name and Address.
- The Please Recalculate text will appear on the TBW Coverages and Alerts tabs when the endorsement request needs to be recalculated/updated to reflect changes. Once you click this text or the Recalculate button, the Please Recalculate text will be removed. It will appear again whenever recalculation is needed.



5. Be sure to review any Alerts.
6. Once complete, submit the endorsement request to the company in the usual way.

Additional Tips for Creating or Modifying Endorsement Requests

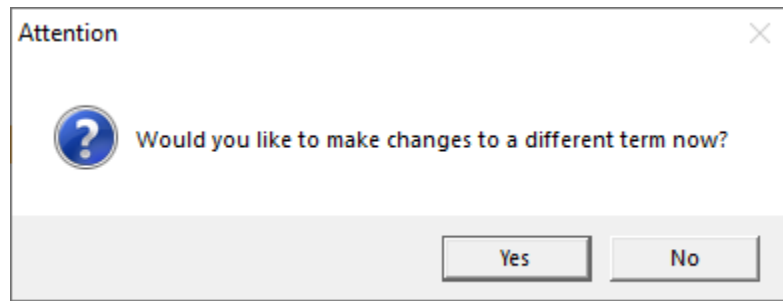
Modify an Endorsement Request

To modify an endorsement request, check out the document and open it on the Desktop. Select the TBW Coverages tab. Click a toolbar button or click an item directly in the document (as described above) to open the corresponding window and make required changes. Click the Recalculate toolbar button or the blue Please Recalculate text to update the endorsement request.

Performing Changes for Two Terms

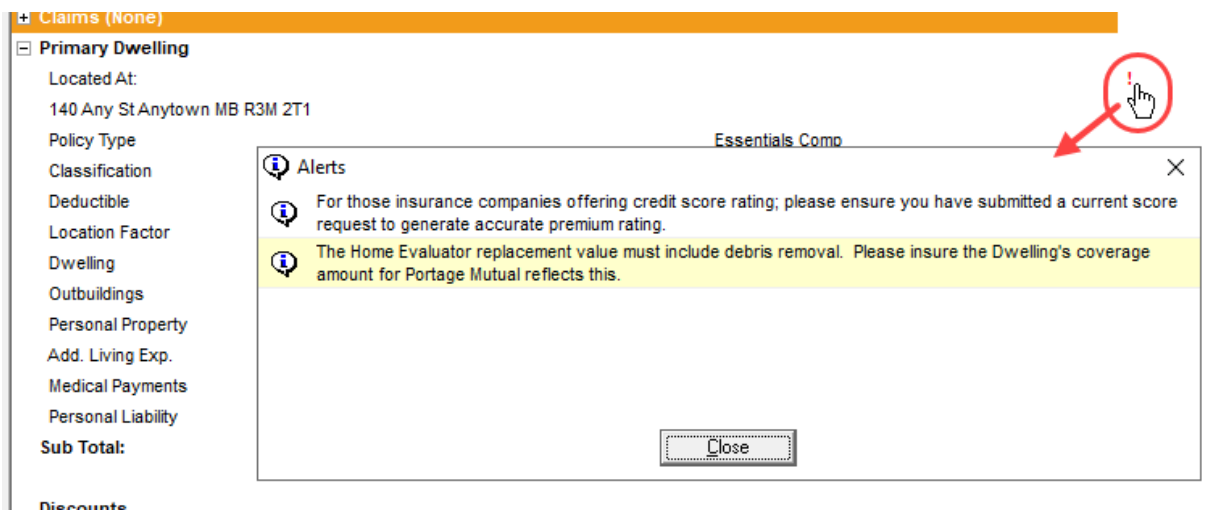
If you are creating an endorsement request for a CSIO policy with multiple terms available, an Attention pop-up will display after you click OK in the Billing Details window, asking if you would like to apply the changes to another term.

- Click No to create the change request for this term only, or click Yes to select and apply the changes to another term, as well. A change request will be generated for each term.




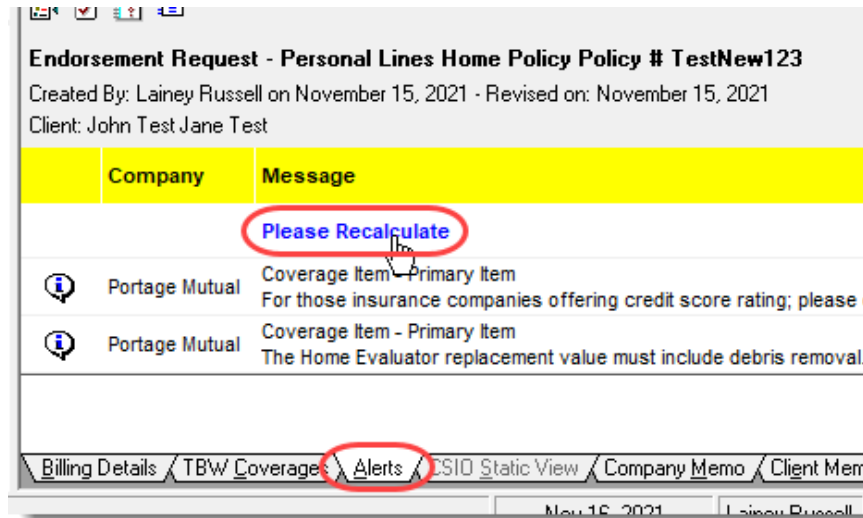
Alerts

On the TBW Coverages tab, a red exclamation mark (!) indicator is found beside applicable coverages as a visual reminder to check Alerts. Click the red indicator to view a pop-up with Alerts for that coverage, or go directly to the Alerts tab to review all Alerts.



The blue **Please Recalculate** text will appear on the Alerts tab (and the TBW Coverages tab) when the endorsement request needs to be recalculated/updated to reflect changes. Once you click this text (or the Recalculate button on the TBW Coverages tab), the IQ will be recalculated and the Please Recalculate text will be removed. It will appear again whenever recalculation is needed.

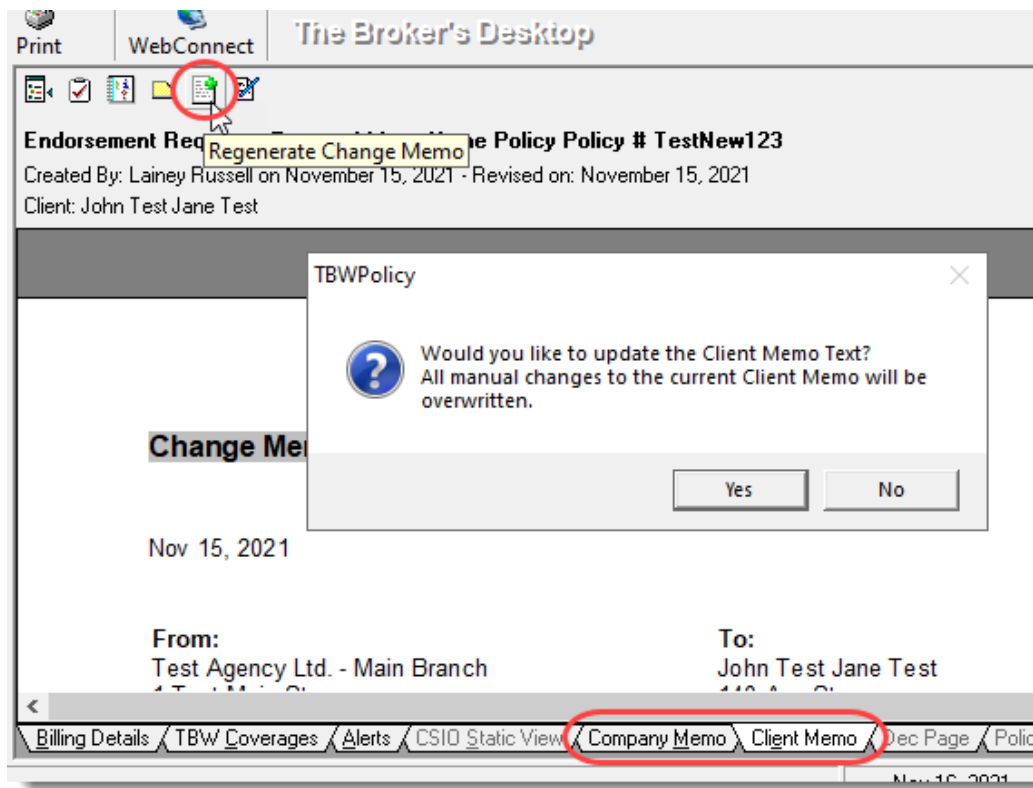
- Your mouse will change to a hand  indicating that the Please Recalculate text can be clicked.



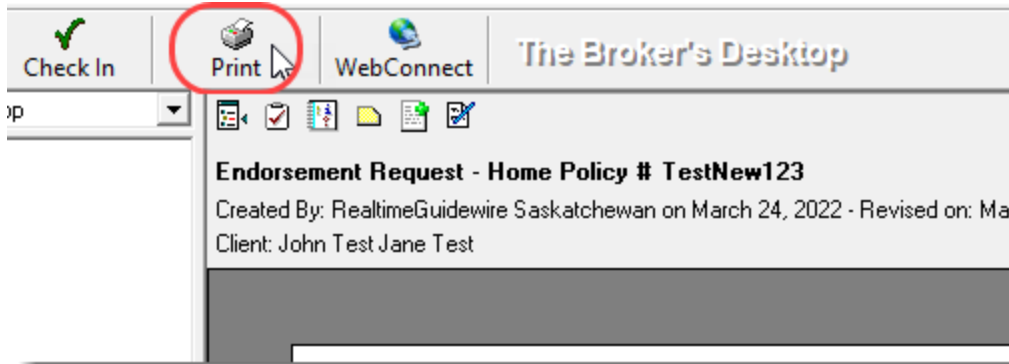
Regenerate a Change Memo

The new Regenerate Change Memo toolbar button on the Company and Client Memo tabs allows you to quickly update the change memo to reflect recent changes. When you have selected the applicable tab, click the **Regenerate Change Memo** button, and click Yes in the pop-up if you would like to update the text for that memo. Once updated, the memo can be forwarded to the recipient in the usual way.

- Please note, a memo must be updated from the corresponding tab.



A memo can be printed from the applicable tab by clicking the **Print** button on the TBW toolbar.

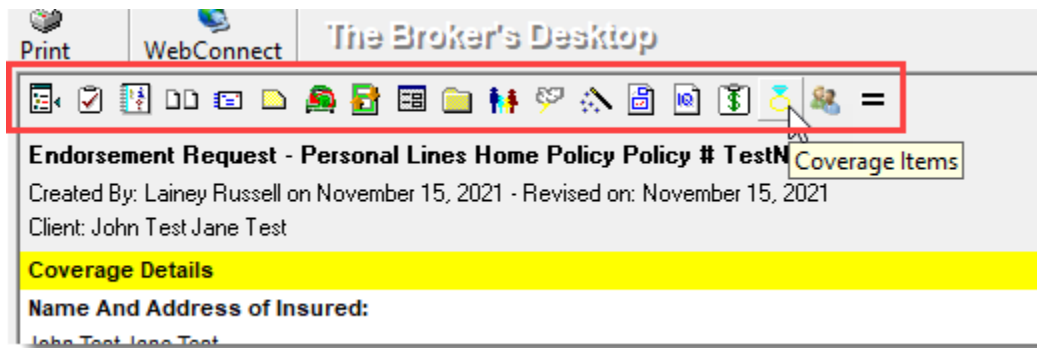


Depending on your office workflow...

- You can print the client memo and have the client sign it. The signed memo can be scanned and imported back into TBW and the applicable client folder.
- For non-Realtime companies, you can print the company memo as a PDF and then email the PDF to the company.













Enhanced TBW Coverages Toolbar

When an endorsement request is open on the TBW Desktop, use the enhanced TBW Coverages toolbar to accomplish common tasks quickly and easily. The toolbar is found at the top of the TBW Coverages tab. Hover your mouse over a toolbar button to see a tooltip providing a description of its function.



Here are the TBW Coverages toolbar buttons and their corresponding functions.

Button	Action	Button	Action
	Locate Request in Tree		Open the Folder Details window
	Create a New Abeyance		View/edit associated Persons
	Create a New Activity		View/edit associated Claims
	Compare coverage details		Open the Coverage Item Wizard
	Send document by Email		View/edit IQ Quote/App Details (Property only)

	Add/edit Notes to Underwriter		View/edit IntelliQuote Details
	Remove Coverages		Map Driver and Vehicle Details (Auto only)
	Expand Coverages (Auto only)		Open the Premium Deviations form
	Collapse Coverages (Auto only)		Open Optional Coverages to add, modify, or delete items
	Perform a Policy Sync (SGI CANADA Realtime only)		Open Applicant Declaration/Credit Score form
	Open the Billing Details form		Recalculate (update)

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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.