

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*

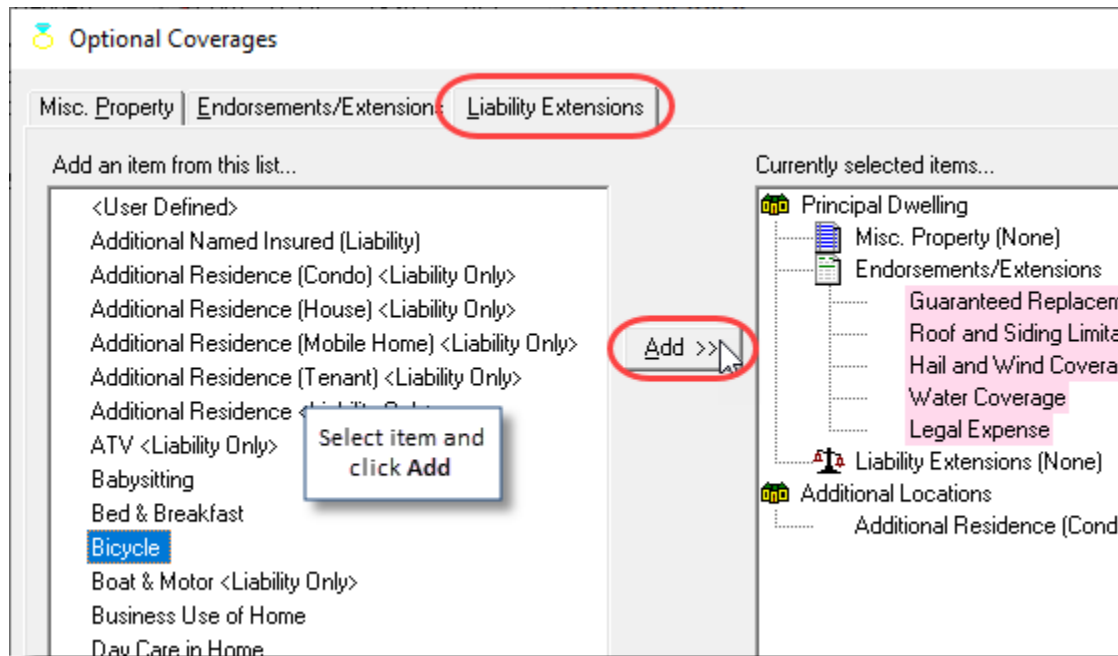
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1. [Attach Liability Extensions to Any Dwelling](#) – When a Property IntelliQuote has multiple dwellings, a Liability Extension can now be attached to the Primary dwelling or any Secondary dwelling in the IQ.
2. [Save/Save As PDF from Pop Out Window](#) – When you click the Pop Out Document button to open a PDF in a separate window, use the Save/Save As options to save the PDF internally (in TBW/TUW) or to an external location.

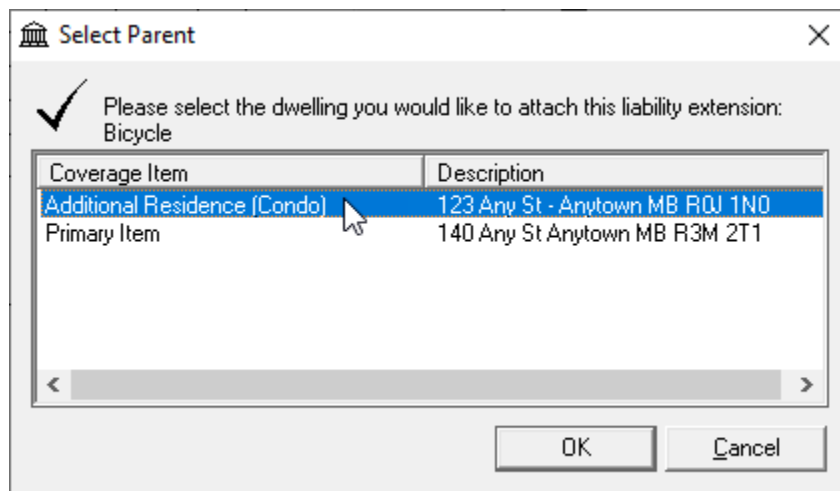
## 1. Attach Liability Extensions to Any Dwelling

When a Property IntelliQuote has multiple dwellings, a Liability Extension can now be attached to the Primary dwelling or any Secondary dwelling in the IQ.

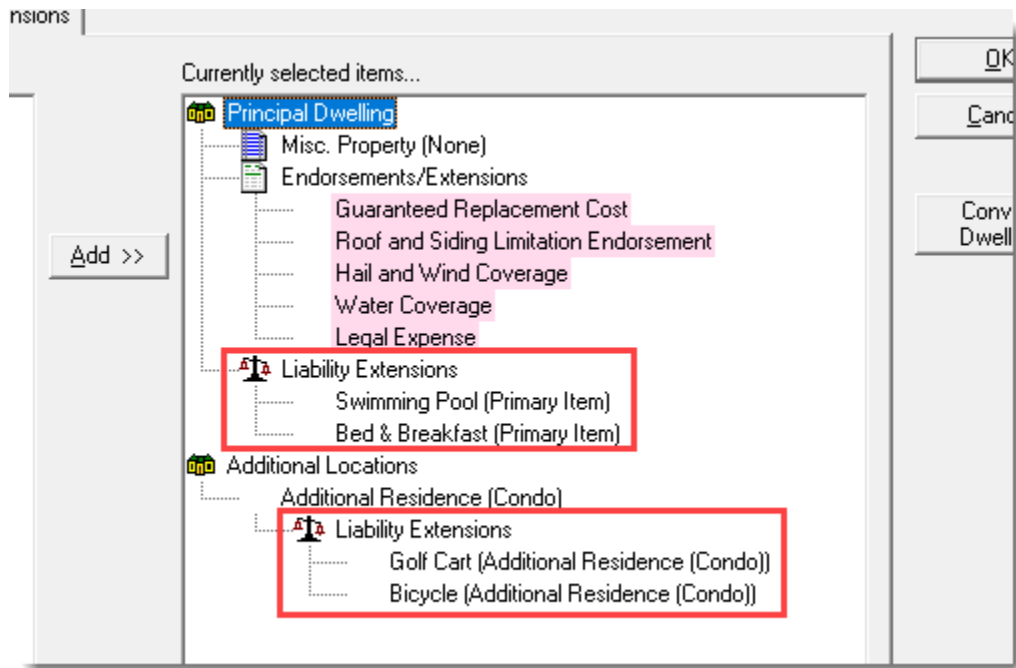
When you are creating or modifying a Property IQ, a Liability Extension can be added to a dwelling in Optional Coverages. Select the **Liability Extensions** tab, select the item in the list, and click the **Add** button.



In the **Select Parent** window, select the dwelling you would like to attach this Liability Extension to and click OK.



Once you have entered requested details in the Coverage Item Wizard, the Liability Extension will display in the Currently selected items list, attached to the applicable dwelling.



In the IQ Coverage Report and Summary Report, Liability Extensions added to an Additional Residence will be labeled with the corresponding dwelling.

PERSONAL PROPERTY	
Additional Residence (Condo)	\$100,
LIABILITY COVERAGES	
(E) Personal Liability	\$1,000,
Additional Residence (Condo)	\$1,000,
Bed & Breakfast	
Bicycle - Additional Residence (Condo)	
Golf Cart - Additional Residence (Condo)	\$1,000,
Swimming Pool	\$1,000,
<b>TOTAL PREMIUM</b>	<b>\$1,</b>


Coverage Report / Summary Report(s) / Alerts / Co

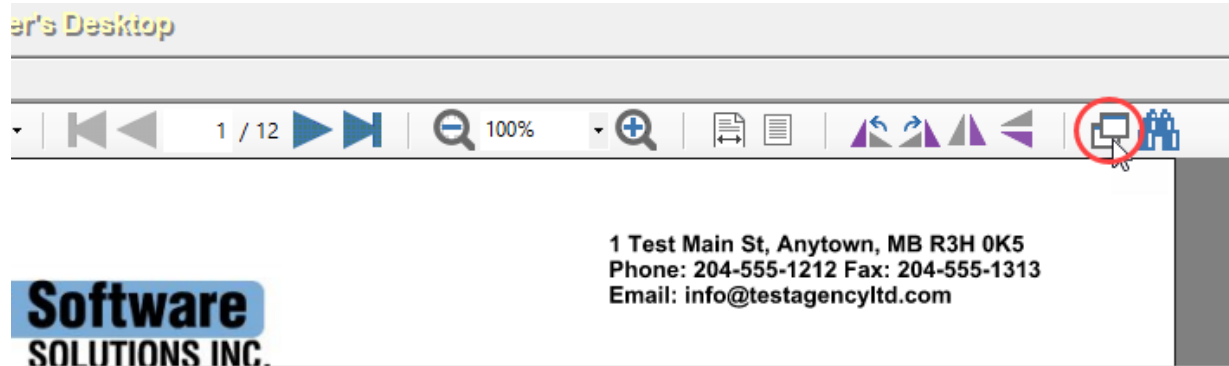
If a dwelling is converted to another type, any Liability Extensions will automatically be attached to the new converted dwelling. These items can be edited or deleted as needed.

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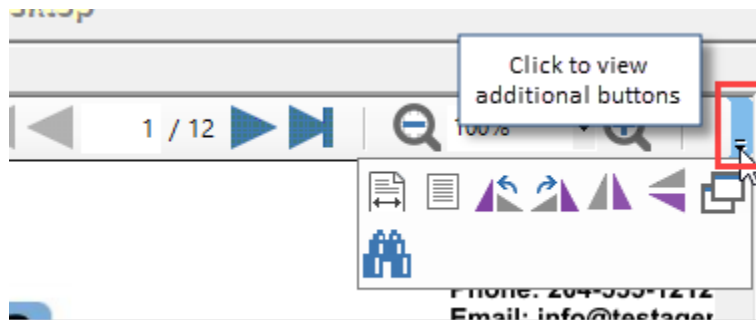
## 2. Save/Save As PDF from Pop Out Window

When a PDF document is open on the TBW/TUW Desktop, the Pop Out Document button allows you to open and view the document in a separate window. Now, you can use the Save/Save As options from this pop out window to save the PDF internally (in TBW/TUW) or to an external location.

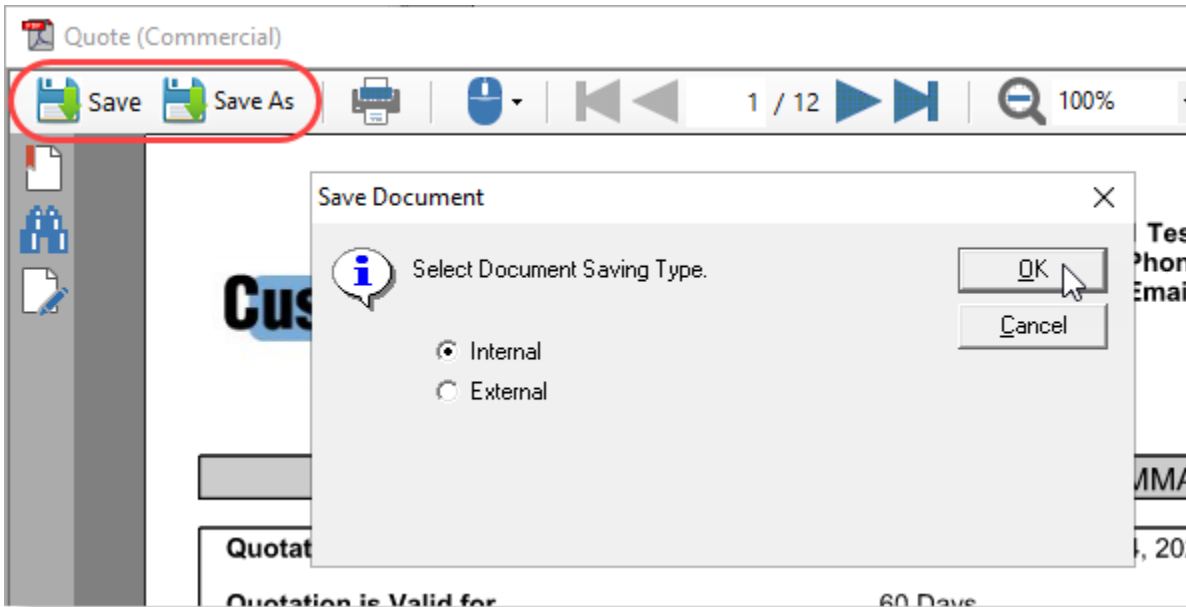
When a PDF document (e.g. a Quote or Dec Page) has been checked out and opened in the Document Window, click the **Pop Out Document**  button on the PDF toolbar.



- If some toolbar buttons are not visible, click the arrow at the end of the toolbar to access them.



When you click the Pop Out Document button, the PDF will open in its own window. Click Save or Save As. In the **Save Document** pop-up, select the document saving type (Internal or External) and click OK.



When saving internally, you will be prompted to add a descriptive file name, and the file will be saved automatically to the current folder. When you save the PDF externally, you will be asked to enter a descriptive file name and select the location on your computer to save the file.

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Please share this information with the appropriate TBW and TUW users in your office(s). If you have any questions about these features, please contact our Client Services Team at 1-888-291-3588 (toll-free telephone) or [clientservices@cssionline.com](mailto:clientservices@cssionline.com).

Thank you for using The Broker's Workstation and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.