

7 March 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)**:

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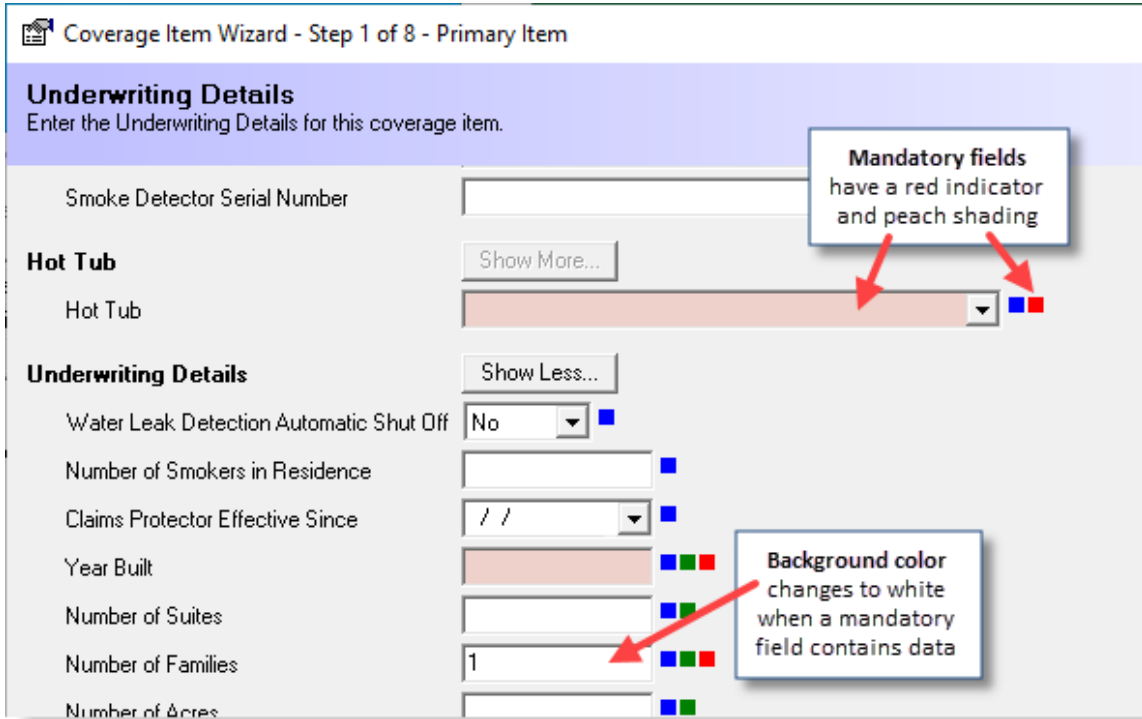
1. [Mandatory Fields Identified in Coverage Item Properties](#) – Mandatory fields in the Coverage Item Properties Wizard are now identified with a red indicator and background shading. Completing these “must-edit” fields will ensure you have entered the minimum mandatory information required to obtain a basic quote.
2. [Extended Name Field for One-Off Payee](#) – The Name field for One-Off Payees has been extended to accommodate longer names, now allowing up to 250 characters.
3. [Custom Reporting Level Selection for GL Reports](#) – Reporting level selection for GL Reports has been improved, allowing the user to select all, one, or multiple ABDs when running reports.
4. [Cancellation Details in Expiry Report](#) – The Expiry Report will now provide additional details for cancelled policies, including the Cancellation Reason and Custom Reason. Cancellation details will be included when the report is printed or exported to Microsoft Excel.

1. Mandatory Fields Identified in Coverage Item Properties

Mandatory fields in the Coverage Item Properties Wizard are now identified with a red indicator and background shading. Completing these “must-edit” fields will ensure you have entered the minimum mandatory information required to obtain a basic quote.

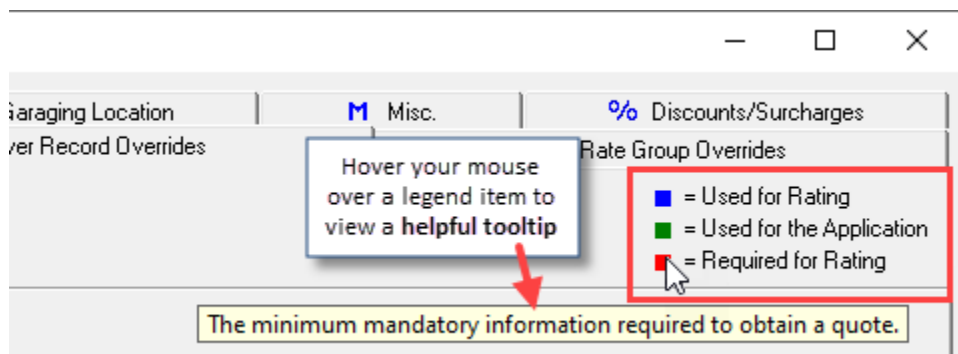
- **Note:** Additional fields required for rating are identified with a blue indicator. **For an accurate quote, it is recommended that you fill in all fields with a blue indicator.**

In Coverage Item Properties, each mandatory field required for a basic rating will have a red indicator next to the field. When such a field is empty, the background color will be peach. When data has been entered in a mandatory field, the background color will change to the default white color.



The Wizard legend has been updated to include the red indicator for mandatory fields. The legend will also now provide helpful tooltips. Hover your mouse over a legend item to view a tooltip defining that indicator's usage, as follows:

- **Blue** – “The information that may impact quote accuracy and underwriting validation. It is recommended to supply this information.”
- **Green** – “The information that may appear on a completed application.”
- **Red** – “The minimum mandatory information required to obtain a quote.”



For items such as Construction, Plumbing, or Outside Wall Coverings that require the sum of all fields to be 100%, all options will be marked with a red indicator and have a peach-colored background. When the sum of all fields is 100%, the background color for all fields will change to white.

Coverage Item Wizard - Step 7 of 7 - Primary Item

Construction/Heating
Enter the Construction/Heating Details for this coverage item.

Plastic (%) [input] [green]

Other (%) [input] [green]

Outside Wall Coverings [Show Less...]

Asphalt Shingle (%) [input] [green]

Aggregate (%) [input] [green]

Aluminum (%) [input] [green]

Brick (%) [input] [green]

Brick Veneer (%) [input] [green]

Cement (%) [input] [green]

Clapboard (%) [input] [green]

Hardboard Siding (%) [input] [green]

Masonite (%) [input] [green]

Masonry (%) [input] [green]

Masonry Veneer (%) [input] [green]

Metal Clad (%) [input] [green]

Steel (%) [input] [green]

Stone (%) [input] [green]

Stone Veneer (%) [input] [green]

Stucco (%) [input] [green]

Vinyl (%) [input] [green]

Wood (%) [input] [green]

[Collapse All] [Expand All]

If a mandatory field is left blank, you will receive a pop-up reminder to complete this field. For a pop-up Alert or a company-specific not-rated Alert, the applicable field will be marked with a red indicator and shaded background.

The Broker's Desktop

Primary Dwelling [green] [green] [green]

Rate Calculation Alerts
Calculation Date: 2021/08/01
Rating Definition: None

	Company	Message
	Wawanesa	Coverage Item - Rented Dwelling For those insurance companies offering...
✖	Wawanesa	Coverage Item - Primary Item Number of Suites field is mandatory. Rate Calc was aborted.
⚠	Wawanesa	Coverage Item - Rented Dwelling Metro 1 has been selected despite Metr Please verify that the protection and loc Do not bind.

Coverage Item Properties - Primary Item

Underwriting Details | Location | Construction/Heating | Cove

Enter the Underwriting Details for this coverage item.

Hot Tub [Show Less...]
Hot Tub [None]

Underwriting Details [Show Less...]
Number of Smokers in Residence [input] [blue]
Year Built [2010] [green]

Number of Suites [input] [red]

Number of Families [1] [green]

Please note, fields that are conditionally required (based on another field's value) are not marked with a red indicator or background shading.

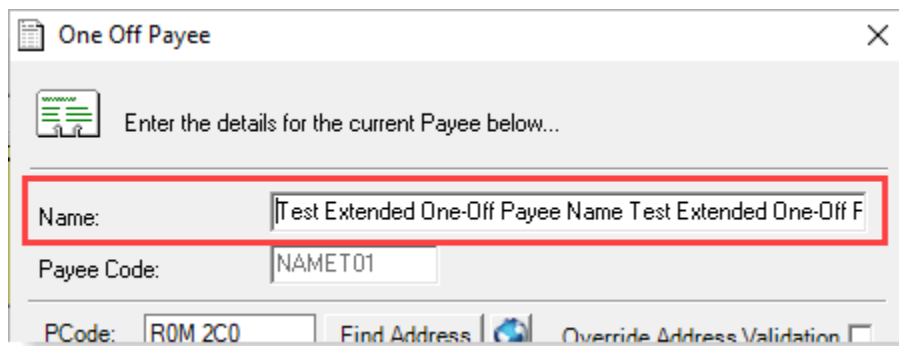
The Mandatory Fields feature is applicable for all coverage items in Property, Farm, and Auto policies in all regions for all companies.

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2. Extended Name Field for One-Off Payee

The Name field for One-Off Payees has been extended to accommodate longer names, now allowing up to 250 characters.

When creating a cheque, select **One-Off** in the Pay To The Order Of drop-down list in the GL Quick Pay form. The One-Off Payee form will display. Note that the **Name** field now allows up to 250 characters.



One Off Payee

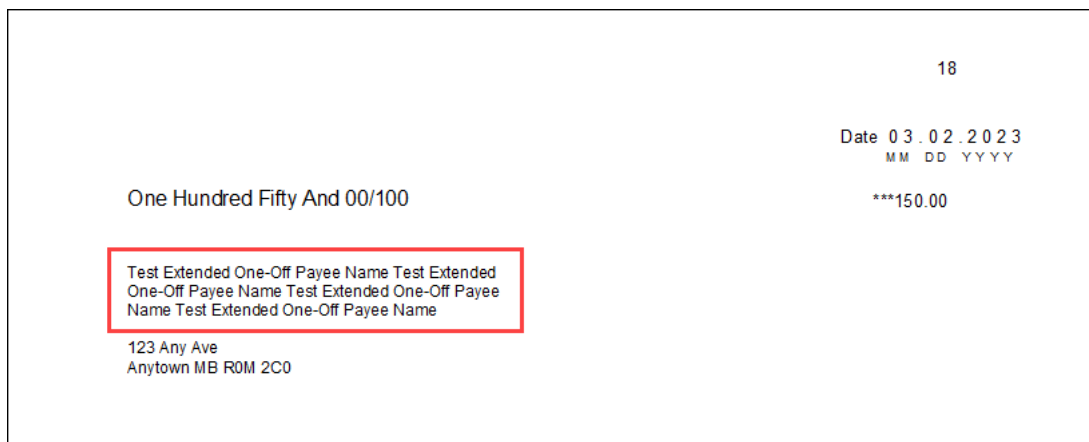
Enter the details for the current Payee below...

Name: Test Extended One-Off Payee Name Test Extended One-Off F

Payee Code: NAMET01

PCode: R0M 2C0 Find Address Override Address Validation

When a cheque with a long One-Off Payee Name is printed, the full name will display, wrapping to a new line after 50 characters, as required.



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Date 03.02.2023
MM DD YYYY

One Hundred Fifty And 00/100 ***150.00

Test Extended One-Off Payee Name Test Extended
One-Off Payee Name Test Extended One-Off Payee
Name Test Extended One-Off Payee Name


123 Any Ave
Anytown MB R0M 2C0

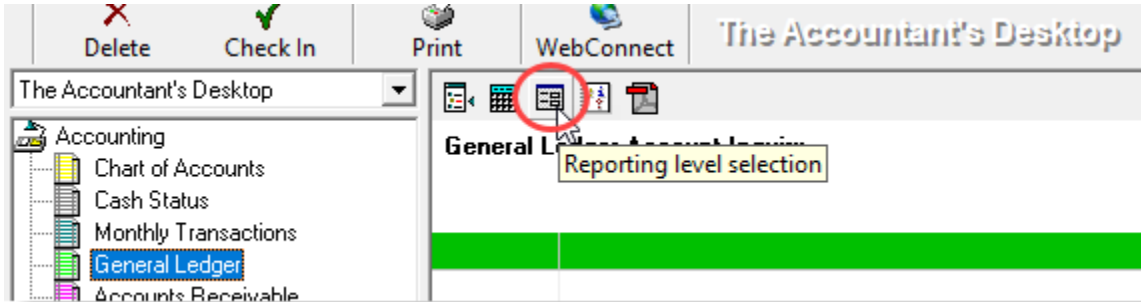
Note that longer names will be truncated as needed to fit in existing fields in accounting reports and other locations.

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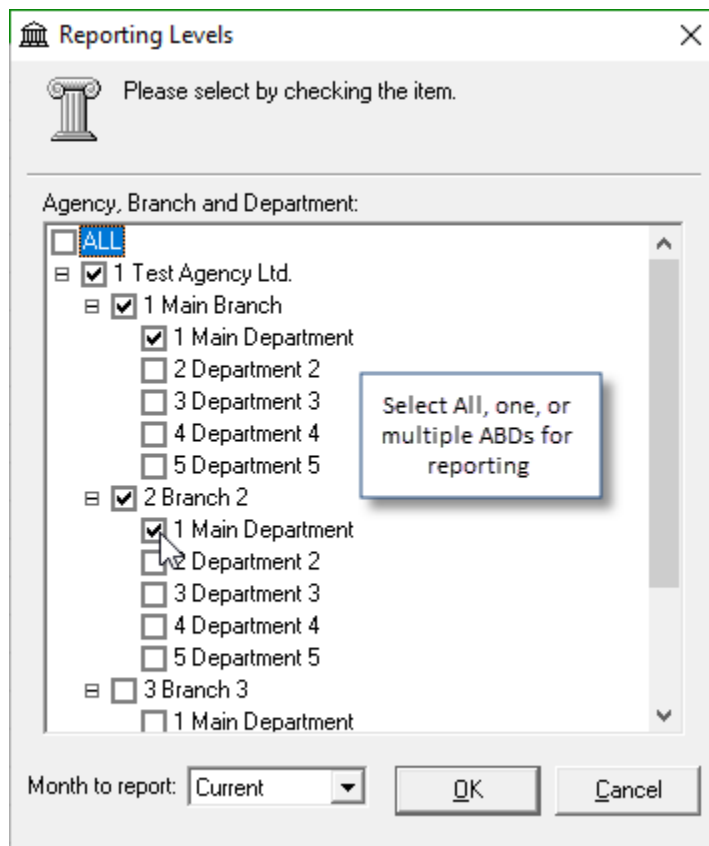
3. Custom Reporting Level Selection for GL Reports

Previously, when a GL Report was created, all or one ABD (Agency/Branch/Department) could be selected for reporting. Now, reporting level selection for GL Reports has been improved, and you can select all, one, or multiple ABDs when running reports.

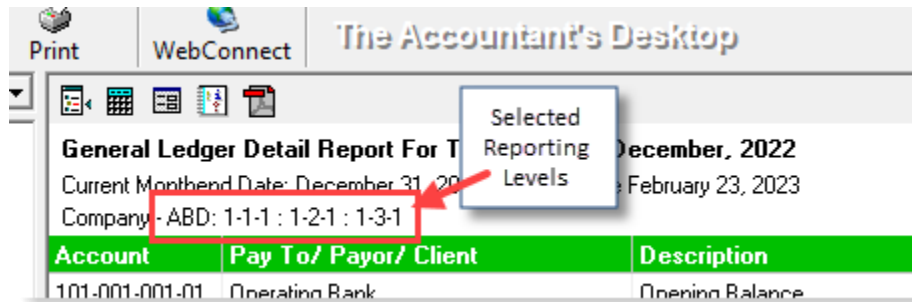
To view this feature, double-click General Ledger in the Accounting Tree on The Accountant's Desktop. Click the **Reporting Level Selection** button  on the toolbar.



The **Reporting Levels** form will display. Select All or the applicable ABD(s), select the Month to report, and click OK.



Generate a GL Report in the usual way. When the report has been run, selected reporting levels will be listed in the report header in the Document Window. Reporting levels will also display in the header when the report is printed or saved in PDF format.



This feature is applicable for all GL Reports, including the GL Standard Report, GL Detail Report, Working Trial Balance, GL Inquiry, Budget Report, and Custom Financial Report.

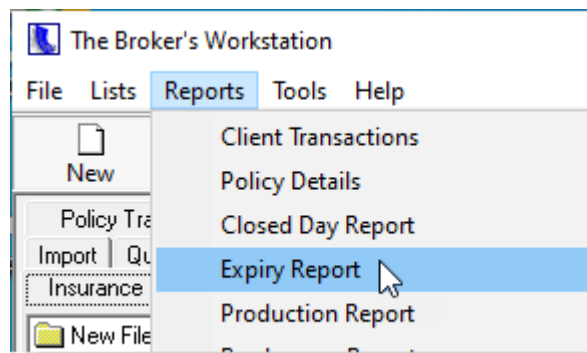
Note that the Custom Financial Report also has a Reporting Level selection option. ABD selection is consistent between the main GL Reporting Level and the Custom Financial Report. This means the ABDs selected in the GL Reporting Level form will automatically apply for the Custom Financial Report, and vice versa.

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4. Cancellation Details in Expiry Report

To enable you to better analyze cancelled policy transactions, the Expiry Report will now provide additional details for cancelled policies, including the Cancellation Reason and Custom Reason.

To create an Expiry Report, click **Reports, Expiry Report**.



In the Expiry Report form, enter report criteria as required. Select the **Include Cancelled** checkbox to include details about any cancelled policies within those parameters. Click **View** to generate the report.

Sub Broker: All

Date Range: 01/01/2023 To: 03/31/2023 mm/dd/yyyy

Include Cancelled:

Show Non-Renewed Only:

Group by: Company

Ready... Set Defaults View Cancel

Report results will display in the Document Window. Note the new **CancReason** and **Custom Reason** columns.

Expiry Report
Reporting Date: February 27, 2023
Created By: Lainey Russell

Sub	Pol Type	Bill	Ann Prem	Renewed	Transact	Cancelled	CancReason	Custom Reason
HOME	A	A	423.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cancelled For Policy Lapse	No Longer Needed
HOME	A	A	1,122.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Non Payment	Left Market Area
HOME	A	A	610.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Insureds Request	No Longer Needed
HOME	A	A	725.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Insureds Request	Left Market Area
HOME	A	A	355.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Insureds Request	No Longer Needed
HOME	A	A	560.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
HOME	A	A	1,045.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

The CancReason and Custom Reason columns will be included when the report is exported to Microsoft Excel.

Policy cancellation details will also display in the printed **Internal Expiry Report**. In the printed report, the **Canc** column will show an "X" if the policy has been cancelled, and the reason will show (up to ten characters) in the **Reason** column.

er's Workstation

Policy Expiry Report
Test Agency Ltd.
Period Reported: January 01, 2016 to March 31, 2023
Printed - Monday, February 27, 2023 at 10:03 AM
Agency - All Branch - All Dept. - All
Producer - All Company - All Sub-Agent - All

Exp Date	Name	Acct No	Company	Pol Num	Producer	Sub	Policy	Bill	Ann Prem	Ren	Trans	Canc	Reason	Cle Bu
Jan 28, 2022	Test Client	TESTC05	AAA Insurance Company	TestHome1234	LR		HOME	A	1,200.00			X	Insureds R	

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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 1-888-291-3588 (toll-free telephone) or clientservices@cssionline.com.

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

Yours sincerely,

Custom Software Solutions Inc.