



February 21, 2005

To: The Broker's Workstation Users

Dear Valued Client:

Re: The Broker'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 its The Broker's Workstation product.

Abeyance Default Setting – A new default option has been added to the main Abeyance Report. At the bottom of the Abeyance Report a user will now see a field “Shows Days Ahead/Back”. A user can enter any number of days into this field (positive or negative) and it will show abeyances from the system date plus or minus the default number of days chosen by the user. The default number of days can be set by each user depending on their requirements. A user will continue to be able to use the “From Date” and “To Date” fields on the Abeyance Report.

Coverage View – On the coverage view for a document a “People” and “Claims” section has been added. A user can expand these sections to show the summary information for people and claims that are attached to the document they are viewing.

Further functionality has been added that allows users can now expand/collapse entire sections of the coverage view.

Color banding has also been added to the report to improve viewing.

New EDI Processing Printout – The transaction type (ie. renewal, endorsement, new policy, etc...) has been added to the “New EDI Processing” printout report.

Updated Cash Status Report -- The Cash Status Report on the Accounting desktop has been updated to permit the user to input a reporting date. The Cash Status report will now report the cash balance for each bank account as of the selected reporting date. The default value on the dialog box is the current System Date, but the user may enter any desired reporting date. This update addresses the impact that post-dated receipts or cheques have on the reported cash balance by excluding transactions dated after the selected reporting date from the balance calculation.

Custom Software
SOLUTIONS INC.

297 Nelson St. W. P.O. Box 639 Virden, MB, R0M 2C0
Tel: 204-748-4800, 1-888-291-3588 Fax: 204-748-4806
www.cssionline.com

G/L Account Number Selection on Transaction Entry Forms - Users of The Broker's Workstation Business Management System now have the opportunity to type general ledger account numbers into the data entry forms for cheques, receipts and journal entries instead of relying entirely on dropdown scroll boxes for account selection. As the account number is entered digit by digit, the system will respond by presenting the first matching account number based on the values entered. Staff with extensive accounting responsibilities and a good knowledge of their account numbering will find this enhancement will really increase transaction entry speed. This change has also been made to the General Ledger Inquiry account range selection form.

Users should note that the leading zeroes on an account number are part of the account number and should be keyed in as appropriate for the account selection to work properly.

For the more casual accounting user, the dropdown scroll boxes on the transaction entry and inquiry forms continue to work as usual.

Please run the TBW Remote Update Utility to access these changes. For assistance in using these new features, please contact our Support Team at 1-888-291-3588.

Please share this information with all TBW users in your office(s) and thank you for using TBW.

Yours truly,

Custom Software Solutions Inc.

Custom Software
SOLUTIONS INC.

297 Nelson St. W. P.O. Box 639 Virden, MB, R0M 2C0
Tel: 204-748-4800, 1-888-291-3588 Fax: 204-748-4806
www.cssionline.com