



31 July 2009

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 newest features to **The Broker's Workstation (TBW)**:

Contents

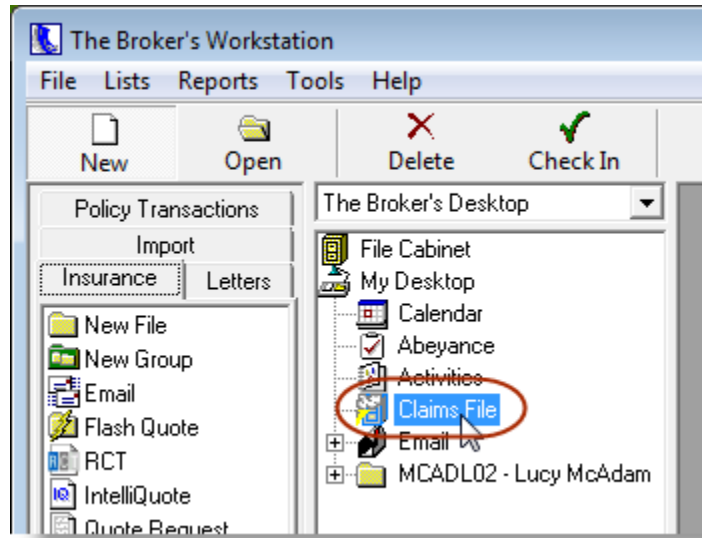
1. [Export the Claims List to Microsoft Excel](#) – The Claims List can now be exported to Microsoft Excel for additional formatting, calculations, and more.
2. [Export the Closed Day Report to Microsoft Excel](#) – In addition to printing or saving the Closed Day Report, the TBW user can now also export the report to Microsoft Excel.

1. Export the Claims List to Microsoft Excel

We are pleased to announce an enhancement to TBW that allows the user to export the Claims List to Microsoft Excel for additional formatting, calculations, etc.

To create a new Claims List, double-click the **Claims File icon** on the **Desktop Tree** (see Figure 1.1).

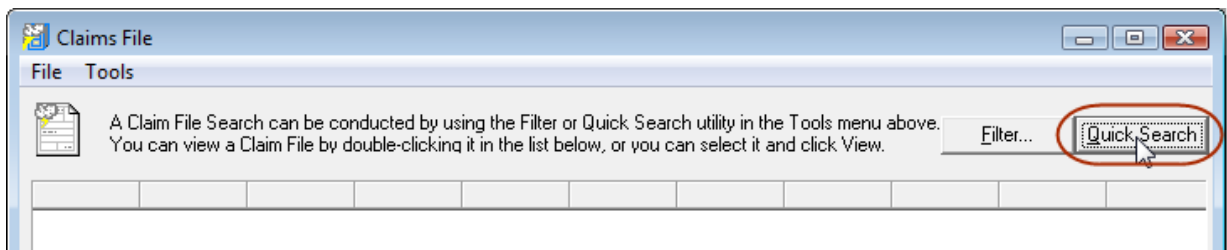
(Figure 1.1)



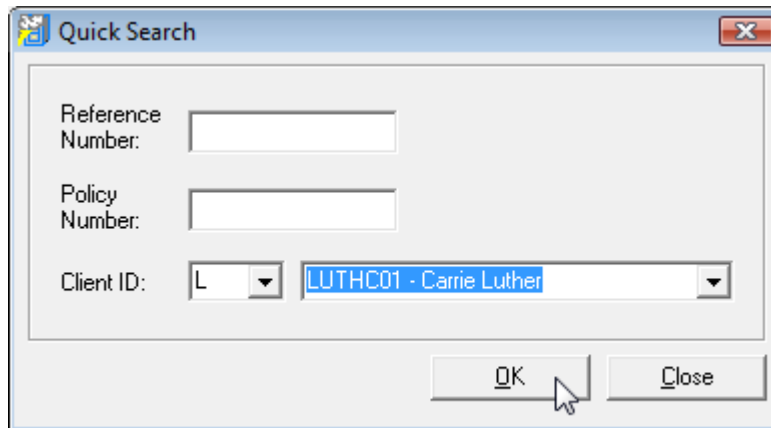
The **Claims File window** will open. To create a Claims List, choose one of the following methods:

- Click the **Quick Search button** (see Figure 1.2), enter requested details in the **Quick Search window**, and then click **OK** (see Figure 1.3), or

(Figure 1.2)

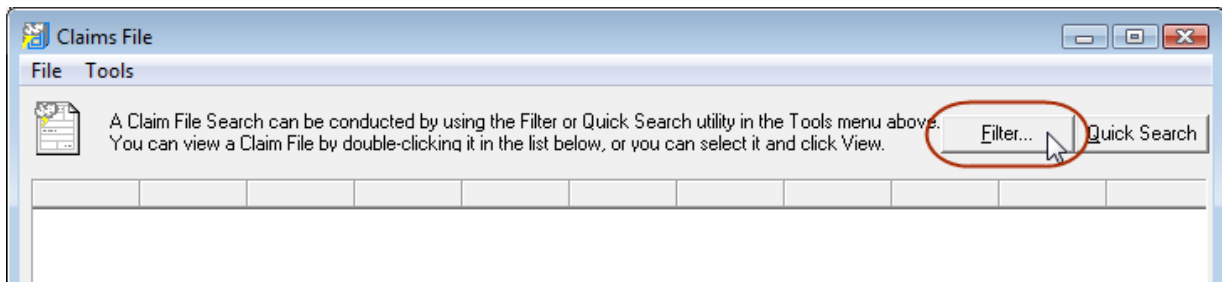


(Figure 1.3)



- Click the **Filter button** (see Figure 1.4), enter specific details in the **Filter window**, and then click **OK** (see Figure 1.5).

(Figure 1.4)



(Figure 1.5)

Filter...

Agency: All

Branch: All

Department: All

Producer: LR - Lainey Russell

Claim Type: All

Peril: All

Status: All MM/DD/YYYY

Open Date: From / / To / /

Close Date: From / / To / /

Company: All

Save Defaults OK Close

The Claims List will appear in the results window. To export the list of claims to Microsoft Excel, click the **Excel button** (see Figure 1.6).

(Figure 1.6)

Claims File

File Tools

A Claim File Search can be conducted by using the Filter or Quick Search utility in the Tools menu above. You can view a Claim File by double-clicking it in the list below, or you can select it and click View.

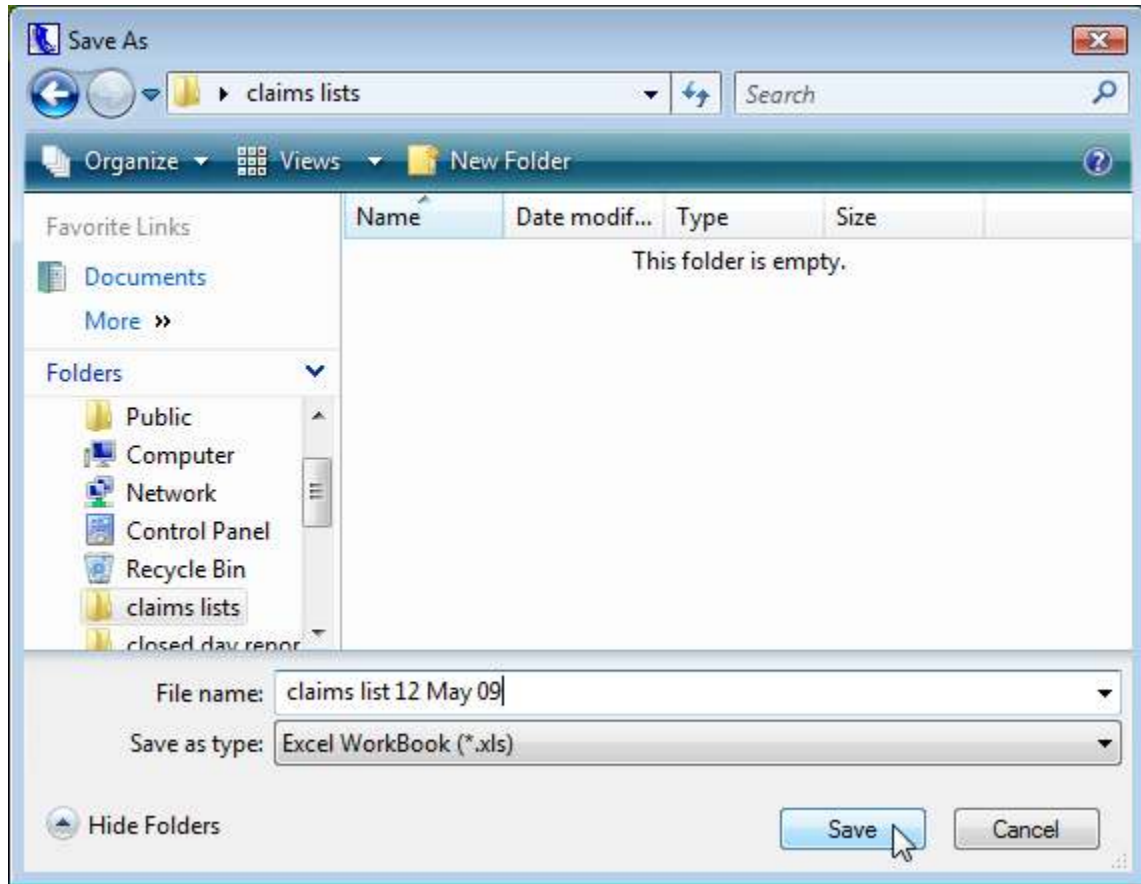
Client ID	Named Insured	Ref. #	Pol. #	Company	Claim Type	Peril	Status	Open D
LUTHC01	Carrie Luther	LUTH8991	26649221	Aviva Traders	Condo	Sewer backup	Closed	11/25/
LUTHC01		LUC79921	266479N0	Arrow	Condo	Burglary	Closed	11/5/20
LUTHC01	Carrie Luther	LU1455078	AX002149	Aviva	Home	Fire	Closed	5/6/200
LUTHB01		LU1455078	AX002149	Aviva	Home	Fire	Closed	5/6/200
HOUSJ01		JITT450	2664990	Aviva	Home	Fire	Closed	10/9/20
LYNLJ01		7822NHV	244IHNE	Ascentus	Seasonal	Vandalism	Closed	5/6/200
YARNA01		26	45	Arrow	Agro	Lightning	Closed	5/7/200
LUTHC01	Carrie Luther				Auto	Theft	Open	11/17/2
LUTHC01	Carrie Luther		0929840		Auto	Collision - Direct Compensation	Closed	9/7/200

12 Records Found

View Close

In the **Save As** window, select the location where the Claims List will be saved, enter a new **File Name**, and then click **Save**. Note that the file will be saved in Excel (.xls) format (see Figure 1.7).

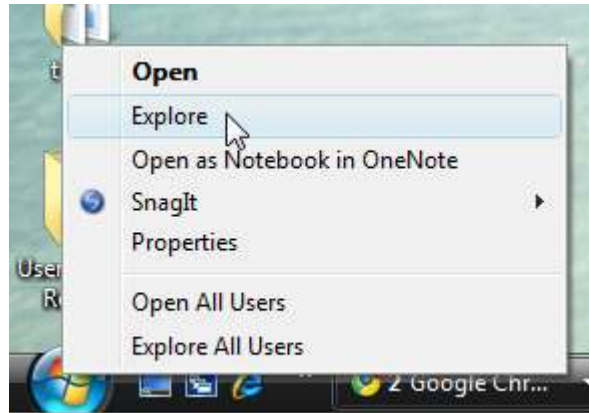
(Figure 1.7)



When you are finished with the Claims File window, click the **Close button** to close the window.

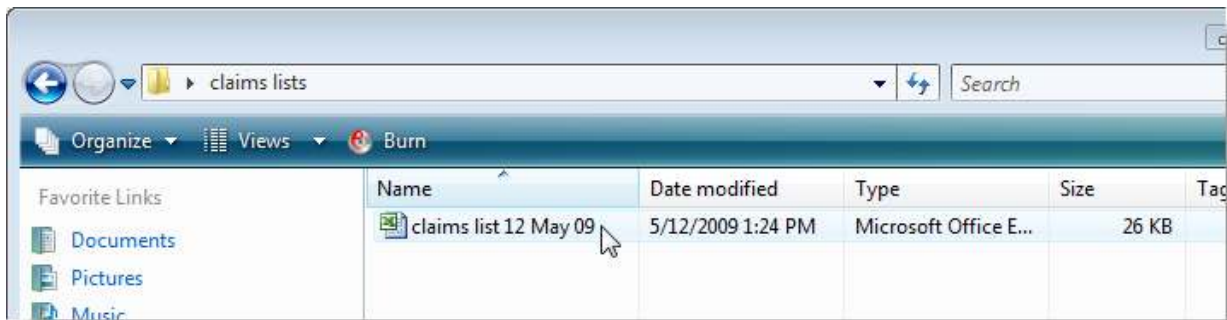
To open the saved Claims List to view, format, or complete additional computations, right-click **Start** and then click **Explore** to open Windows Explorer (see Figure 1.8).

(Figure 1.8)



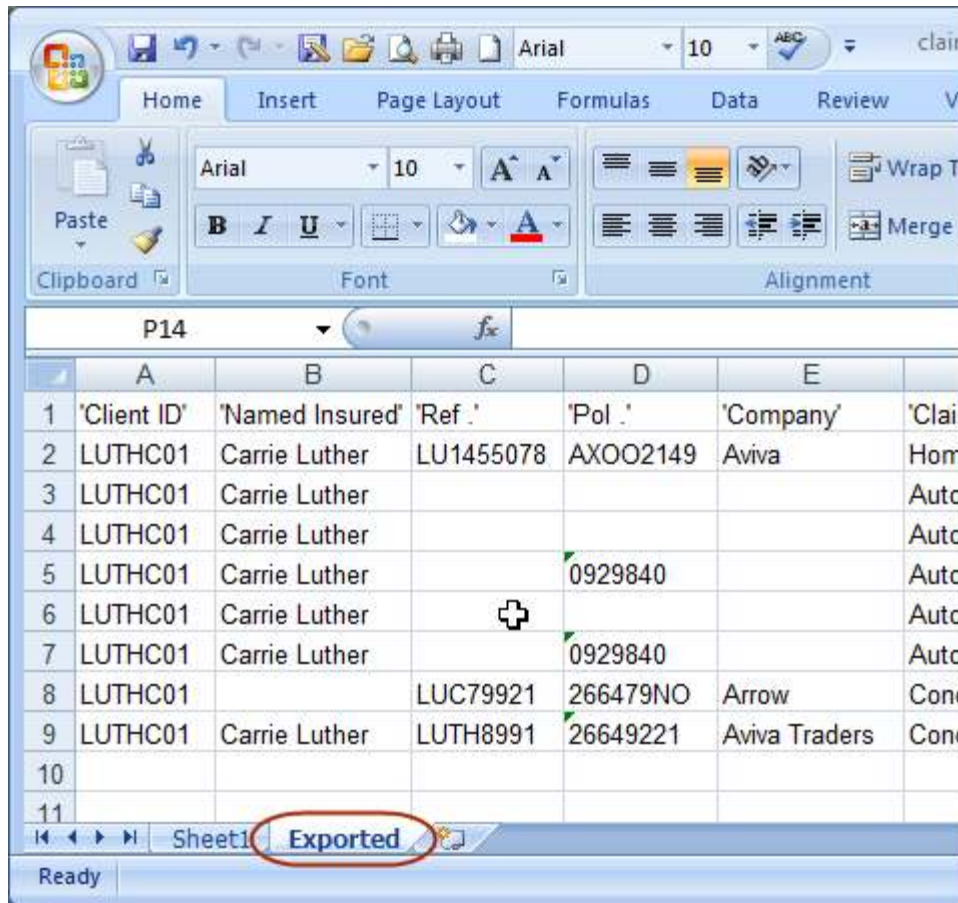
Find the folder where the report is saved, and then double-click the report to open it (see Figure 1.9).

(Figure 1.9)



The report will open in the **Microsoft Excel window** on the **Exported tab** (see Figure 1.10). Format and modify as required, being sure to save any changes you make to the report.

(Figure 1.10)



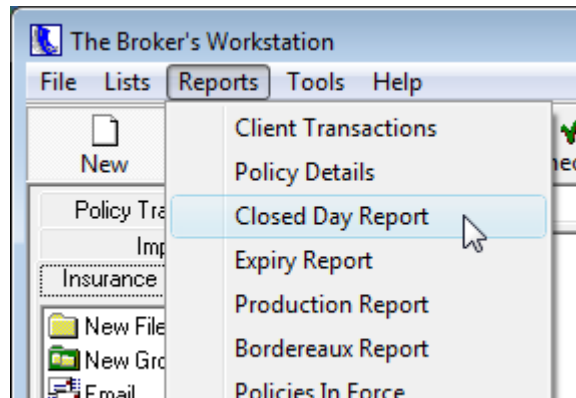
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2. Export the Closed Day Report to Microsoft Excel

The Closed Day Report provides the TBW user with a thorough overview of daily sales activities, including policy transactions, new clients, accounting transactions, and more. We are pleased to announce an enhancement to TBW that allows the user to export the Closed Day Report to Microsoft Excel for additional formatting, calculations, etc.

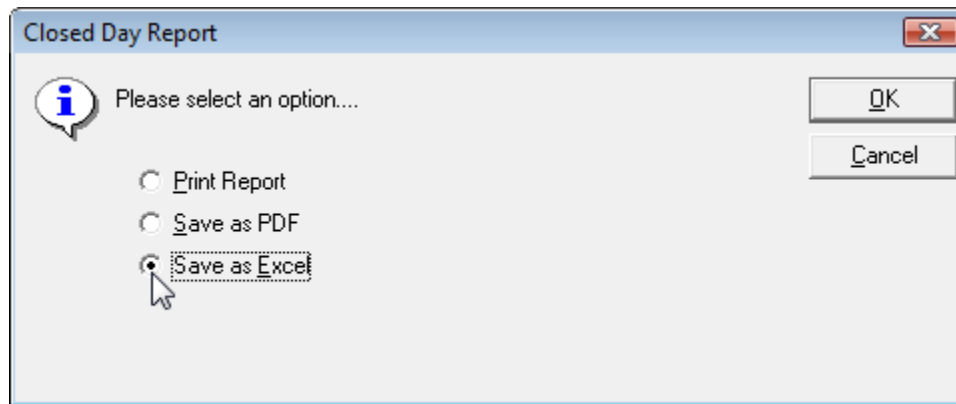
To create a Closed Day Report, click **Reports, Closed Day Report** (see Figure 2.1).

(Figure 2.1)



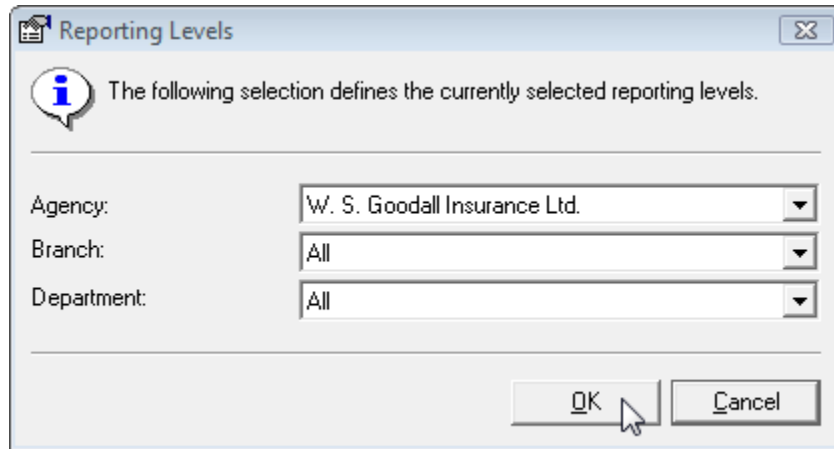
Previously, the user could choose to either print the report or save the report in PDF format. With this enhancement, the user now also has the choice to save the Closed Day Report to an Excel file (see Figure 2.2).

(Figure 2.2)



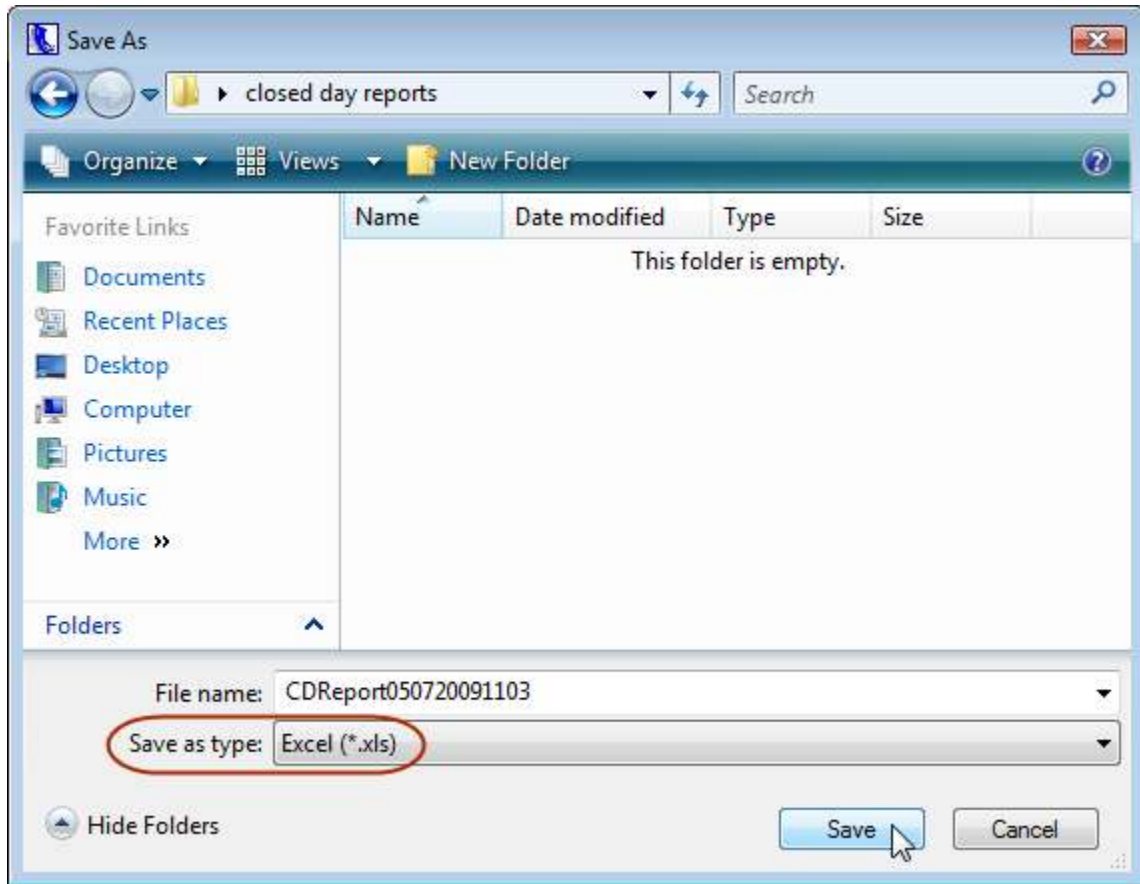
Next, select the target Agency, Branch, and Department in the **Reporting Levels** window, and then click **OK** (see Figure 2.3).

(Figure 2.3)



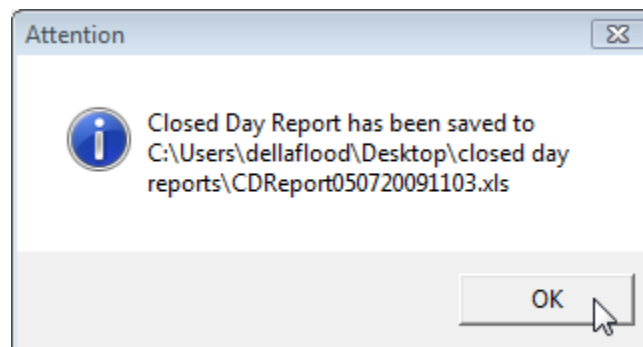
In the **Save As window**, select the location where the Closed Day Report will be saved, enter a new **File Name** (if desired), and then click **Save**. Note that the file will be saved in Excel (.xls) format (see Figure 2.4).

(Figure 2.4)



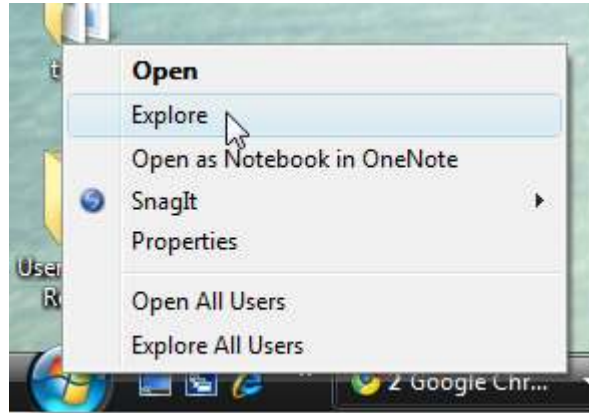
The **Attention** prompt will appear when the report has been created and saved (see Figure 2.5). Click **OK**.

(Figure 2.5)



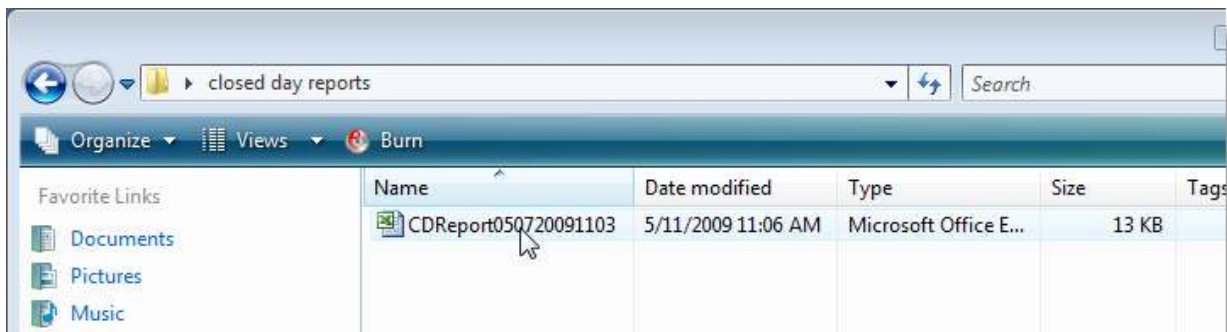
To open the saved Closed Day Report to view, format, or complete additional computations, right-click **Start** and then click **Explore** to open Windows Explorer (see Figure 2.6).

(Figure 2.6)



Find the folder where the report is saved, and then double-click the report to open it (see Figure 2.7).

(Figure 2.7)



The report will open in the Microsoft Excel window (see Figure 2.8). Format and modify as required, being sure to save any changes you make to the report.

(Figure 2.8)

	A	B	C	D	E	F	G	H
1								
2	Daily Transactions							
3	W. S. Goodall Insurance Ltd.							
4								
5	AGENCY: W. S. Goodall Insurance Ltd. BRANCH: All DEPARTMENT: All							
6	System Date: May 07, 2009							
7	Date Printed: May 11, 2009 at 11:06:46							
8								
9	New Clients:							
10	Client ID	Name	City	Prov	Pcode	Phone	ABD	Prd1
11	MBHA001	MB Hab	Saskatoon	SK	V1X 1A1		1-1-1	
12								
13	Policy Transactions:							
14	Typ	Pol#	Desc	Client	Code	Comp.	Eff	Exp
15	POL	900314591	New Polic	MBHA001	HOM	SGI	06-23-09	06-23-10
16								
17								
18	Insurance Documents:							
19	Type	Name	Client ID	Name	Created B	Date		
20	IQ	IntelliQuote	MBHA001	MB Hab	Administr	04-26-07		
21	IQ	IntelliQuote	MBHA001	MB Hab	Administr	04-26-07		
22	IQ	IntelliQuote	MBHA001	MB Hab	Test Doc	11-16-07		

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Please share this information with all TBW users in your office(s). Once you have reviewed this document, if you have any questions regarding these enhancements 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**.

Yours sincerely,

Custom Software Solutions Inc.

