



2 January 2013

**To: Users of The Broker's Workstation and/or The Underwriter's Workstation**

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 enhancement to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

***Contents***

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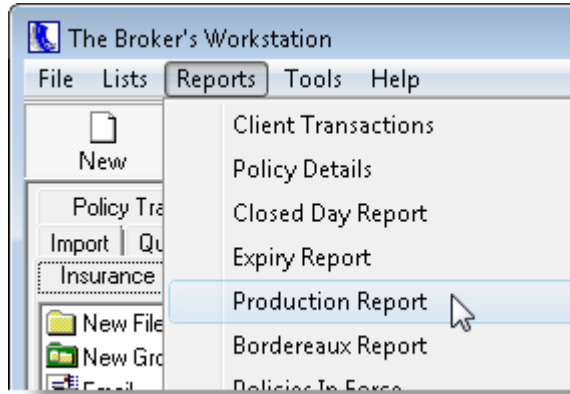
1. [Include Deleted Policy Codes in Production Report](#) – Policy Codes that have been deleted from TBW/TUW Lists are now available for selection as parameters in the Production Report and will be included, as applicable, in report results.

**1. Include Deleted Policy Codes in Production Report**

When creating a Production Report, the TBW/TUW user can now select deleted policy codes to include in the report, as required. While policy codes that have been deleted from TBW/TUW Lists are not available for creation of new transactions, they are available for reporting purposes in the Production Report. This will be desirable in cases where a deleted policy code(s) has been used on policy transactions in the reporting period prior to the deletion of such code(s).

To create a Production Report, click **Reports, Production Report** (see Figure 1.1).

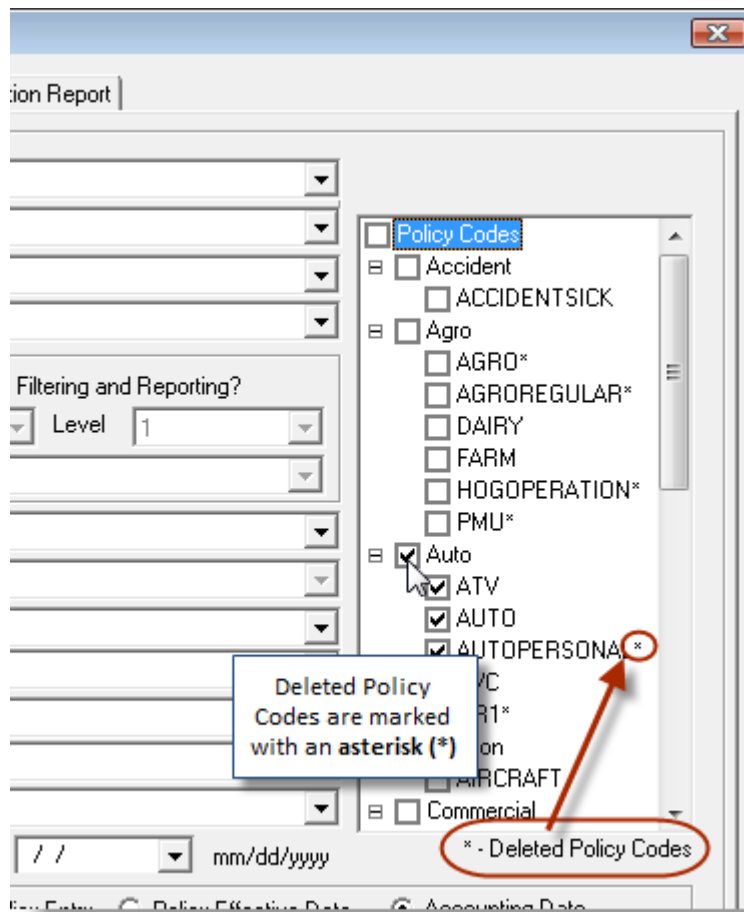
(Figure 1.1)



In the **Production Report** dialog, enter report parameters as desired. Note that when choosing Policy Codes to include in the report, codes that have been deleted are available in the list and can be selected or deselected, as required (see Figure 1.2).

- Deleted policy codes are identified with an asterisk (\*).

(Figure 1.2)



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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 this feature or need further assistance in its usage, please contact our Client Services Team at [clientservices@cssionline.com](mailto: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.



**Microsoft** Partner

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