



23 September 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 enhancements and newest features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

Contents

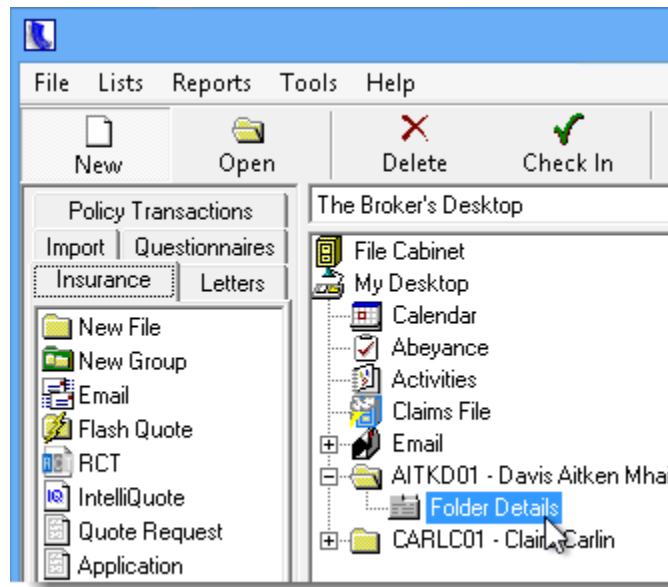
1. [Search Tool on Activities Tab and Abeyance Tab in Client Folder Details](#) – The Search Tool on the Activities and Abeyance tabs in Folder Details allows the TBW/TUW user to search for specified text in a selected column quickly and easily.
2. [Display All Policies or Active Policies Only on Current Policies Tab](#) – In Client folders and Group folders, the Current Policies list can now be filtered to display All Policies or Active Policies Only.


1. Search Tool on Activities Tab and Abeyance Tab in Client Folder Details

The Search Tool has been added to the Activities tab and the Abeyance tab in Client Folder Details. The Search Tool, which allows the TBW/TUW user to search for specified text in a selected column, is especially helpful in locating a particular item in a large list of Activities or Abeyances in a Client folder.

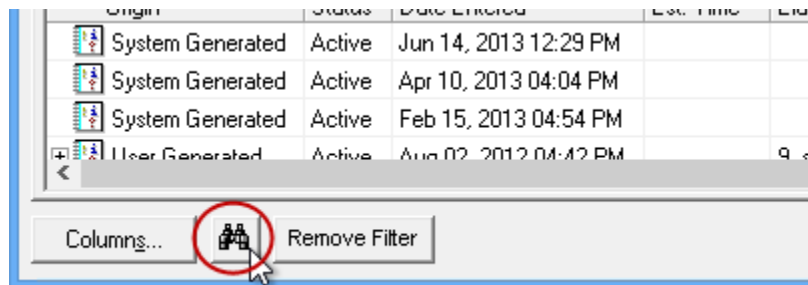
To view this feature, first double-click the client's **Folder Details** in the Desktop Tree (see Figure 1.1).

(Figure 1.1)



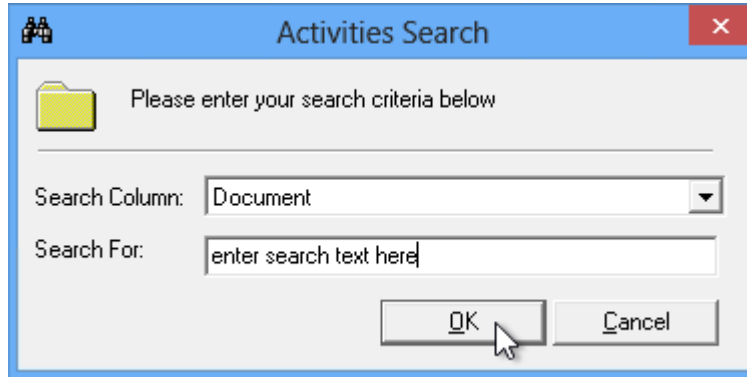
On the **Activities** tab in the **Folder Details** dialog, click the **Search**  button in the lower area of the window (see Figure 1.2).

(Figure 1.2)



In the **Activities Search** window that displays, select the **Column** to search, and then enter the particular text, value, or date you are looking for in the **Search For** box. Click **OK** (see Figure 1.3). The **Activities** tab will reload, displaying only items meeting those parameters.

(Figure 1.3)

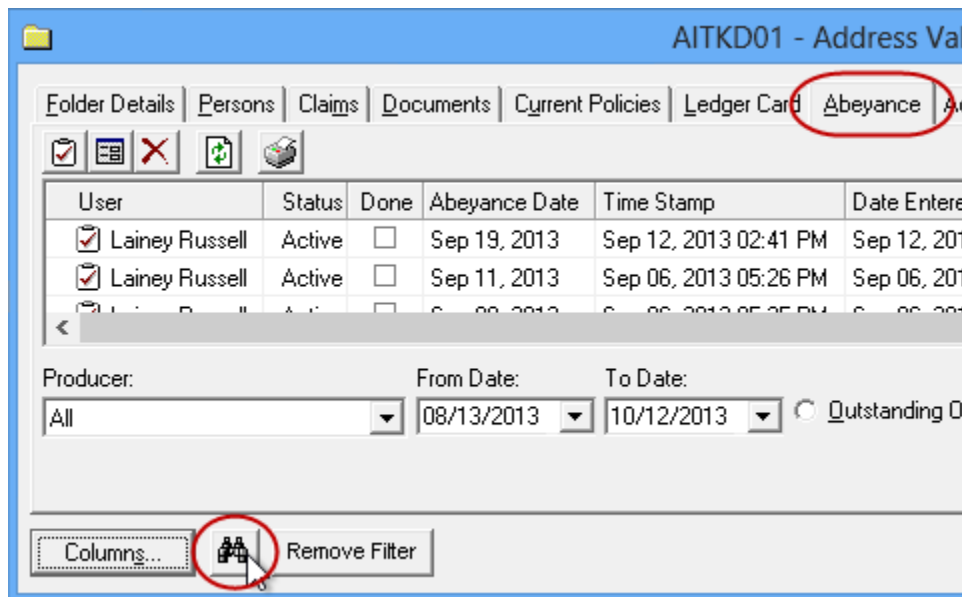


Click the **Remove Filter** button (see Figure 1.2) to restore the full list of Activities or to clear search results before performing another search.

- Note that the full list of Activities will load automatically each time the Folder Details window is opened.

The Search Tool is also available on the **AbeYance** tab in **Folder Details** (see Figure 1.4) and functions in the same manner as above.

(Figure 1.4)



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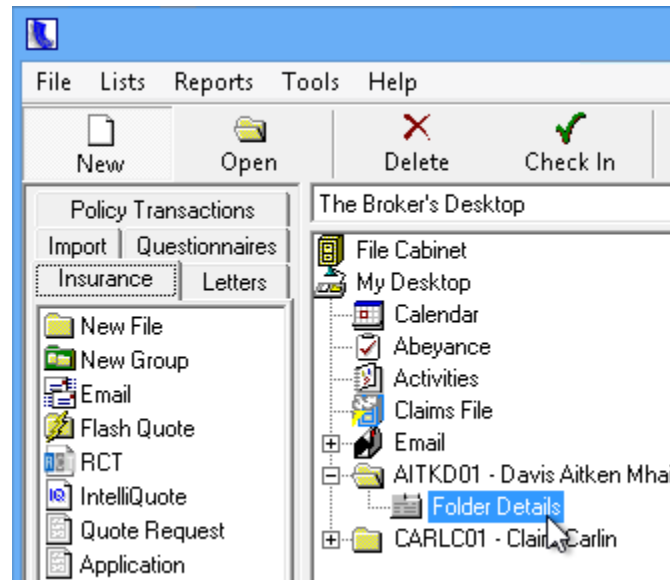
2. Display All Polices or Active Policies Only on Current Policies Tab

The Current Policies tab in Folder Details and in Group Details has been enhanced with a filter option, allowing the user to choose to view All Policies or Active Policies Only in the list of policies.

To view this feature, double-click the client's **Folder Details** in the **Desktop Tree** (see Figure 2.1).

- For a Group Folder, double-click **Group Details** in the Tree.

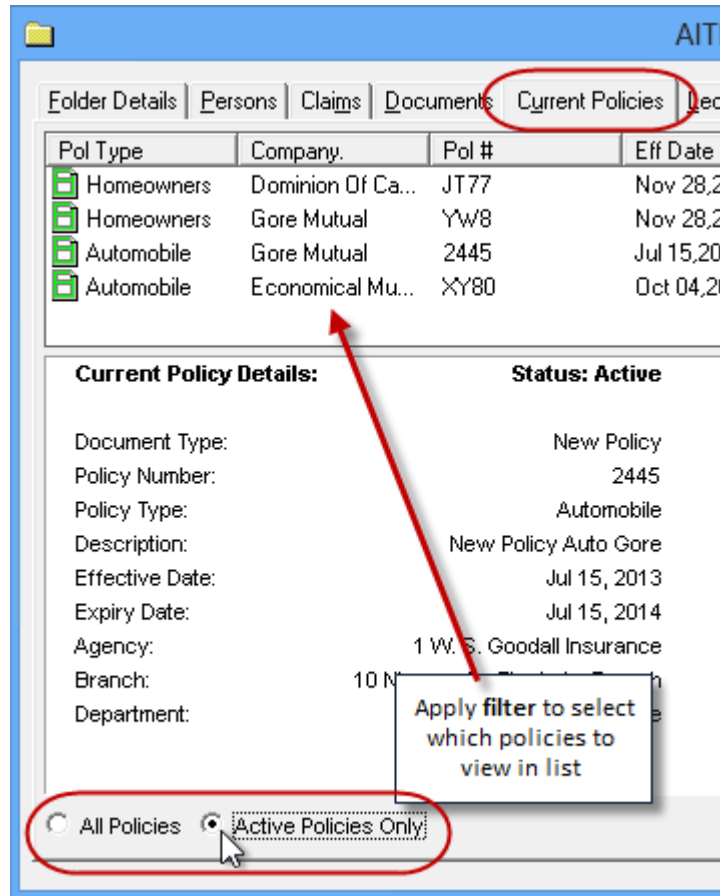
(Figure 2.1)



On the **Current Policies** tab, choose to view **All Policies** or **Active Policies Only** (see Figure 2.2).

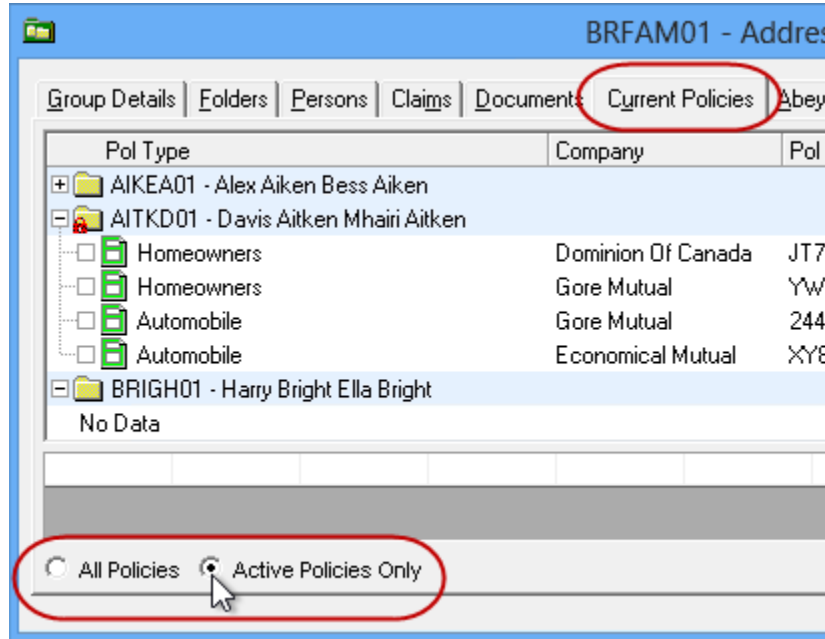
- Apply the Active Policies Only filter to hide any cancelled, lapsed, or expired policies in the list.

(Figure 2.2)



On the **Current Policies** tab in a **Group Folder**, policies are sorted by Client folder, and applying either the **All Policies** or the **Active Policies Only** filter will display applicable policies within each Client folder (see Figure 2.3).

(Figure 2.3)



Please note, once a filter is applied to the Current Policies tab in Folder Details or in Group Details, that filter will remain in place until changed by the user.

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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 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.



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Gold Independent Software Vendor (ISV)