



28 January 2014

**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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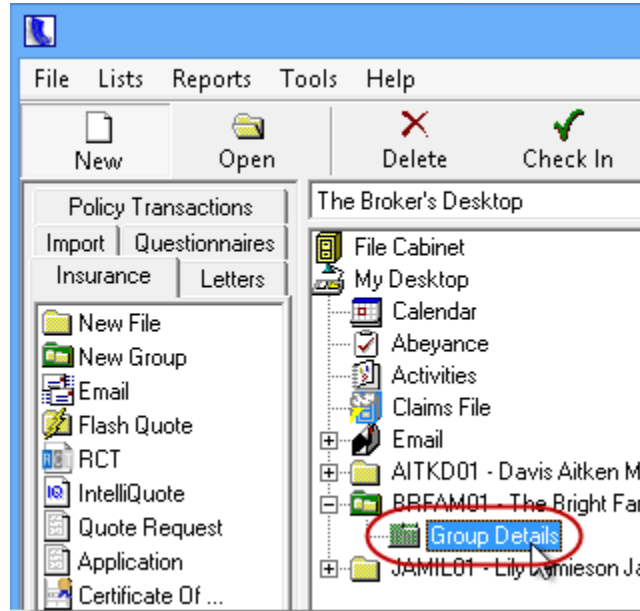
1. [New Producer Levels and Assignments Grid in Group Folders](#) – In the enhanced Producer Grid on the Group Info tab in Group Details, assign one or more Producers, Underwriters, and/or CSRs to the Group Folder.

## **1. New Producer Levels and Assignments Grid in Group Folders**

The Group Info tab in the Group Details dialog has been updated with the new Producer Levels and Assignments grid, allowing TBW/TUW users to assign one or more Producers, Underwriters, and/or CSRs to a Group Folder.

To view this feature, check out the Group Folder, and double-click **Group Details** in the **Desktop Tree** (see Figure 1.1).

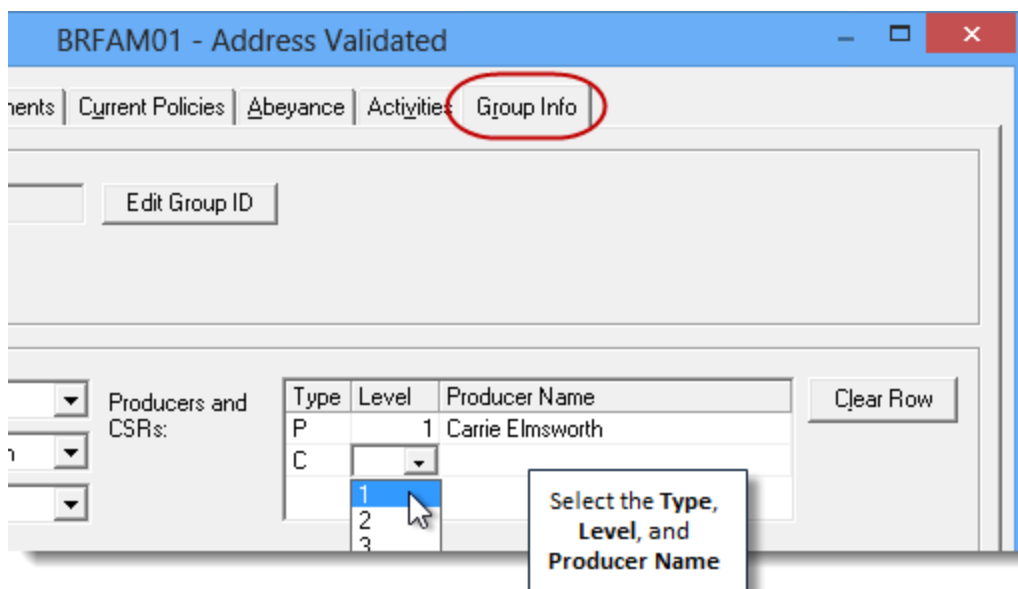
(Figure 1.1)



On the **Group Info** tab in the Group Details dialog, note the enhanced Producer grid. To assign one or more Producers, Underwriters, and/or CSRs to the Group Folder, simply select the applicable **Type**, **Level**, and **Producer Name** from the drop-down menus (see Figure 1.2). Repeat as required for additional assignments, and then click **OK** to close the Group Details dialog.

- Producers and CSRs are available for assignment on The Broker's Desktop, while Underwriters and CSRs are available on The Underwriter's Desktop.
- To delete an entry in the Producer grid, click in the row and click the **Clear Row** button.

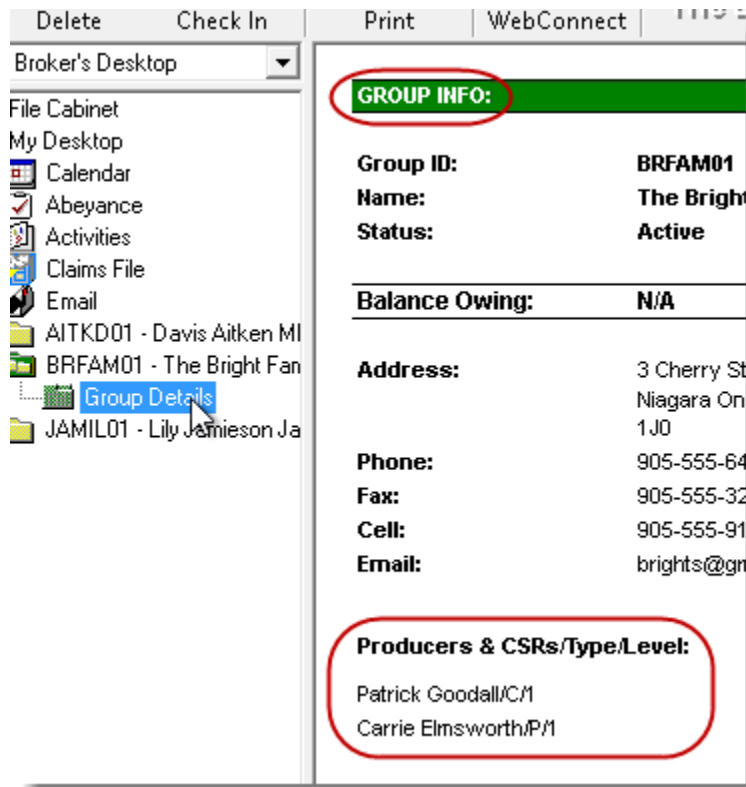
(Figure 1.2)



The Group Folder's Producer assignments can also be viewed in the general information for the folder. To view these details, click **Group Details** once in the **Desktop Tree**. In the **Group Info** area,

the currently assigned Producers, Underwriters, and/or CSRs, along with the corresponding Type and Level, will display (see Figure 1.3).

(Figure 1.3)



Please note, when a Group Folder is created from an existing Client folder (by dragging and dropping the Group Folder icon from the Tray onto the Client Folder in the Desktop Tree), the new Group Folder will automatically prepopulate with the Client folder's producer assignments. These can be adjusted as required.

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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.



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