



17 April 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

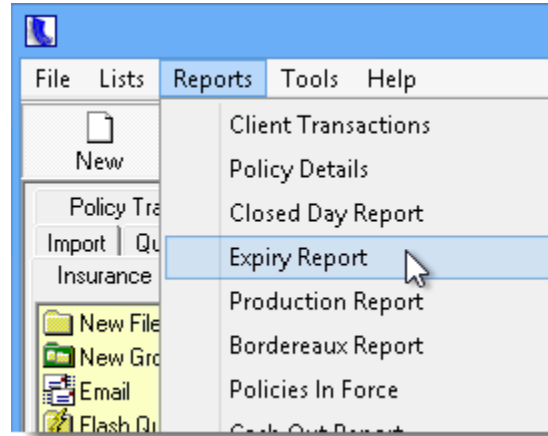
1. [Print Expiry Report by Broker \(TUW\)](#) – When the Expiry Report is prepared grouped by sub-broker, the TUW user can choose to print the report in its usual format or in a series of individual broker reports.

1. Print Expiry Report by Broker (TUW)

The Expiry Report has been enhanced with the option to print the report either in its usual format or in a batch of individual broker reports.

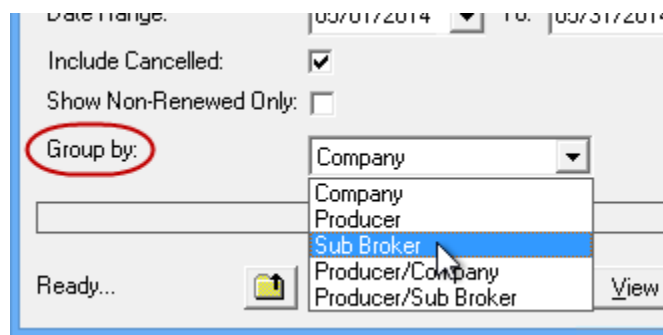
To create an Expiry Report, click **Reports, Expiry Report** (see Figure 1.1).

(Figure 1.1)



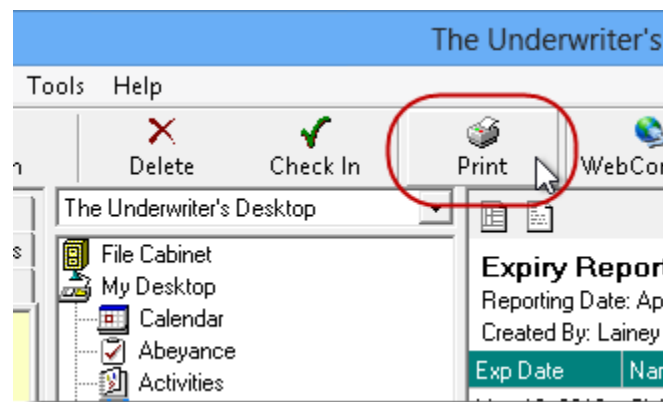
In the **Expiry Report** dialog, enter report criteria, selecting to group the report by **Sub-Broker** (see Figure 1.2). Click **View** to generate the report.

(Figure 1.2)



Report results will display in the Document Window. To print the report, click the **Print** button on the TUW toolbar (see Figure 1.3).

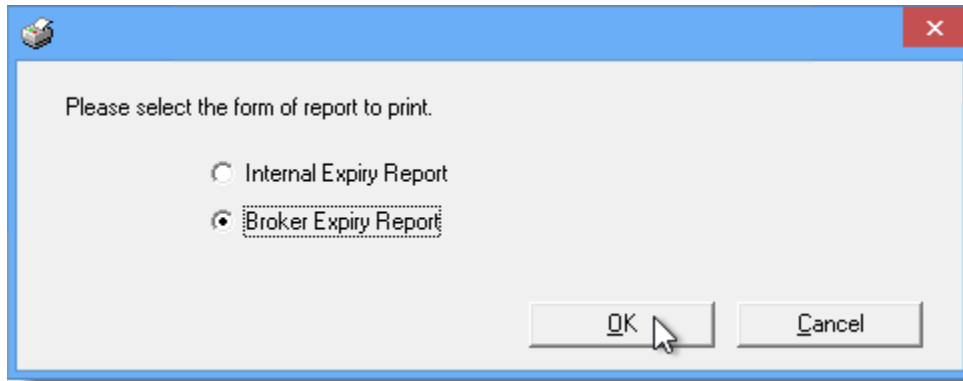
(Figure 1.3)



In the **Print** dialog, select the form of report to print, and click **OK** (see Figure 1.4).

- Select **Internal Expiry Report** to print a copy of the report in the usual manner (as it displays in the Document Window), or select **Broker Expiry Report** to print a batch of individual broker reports.

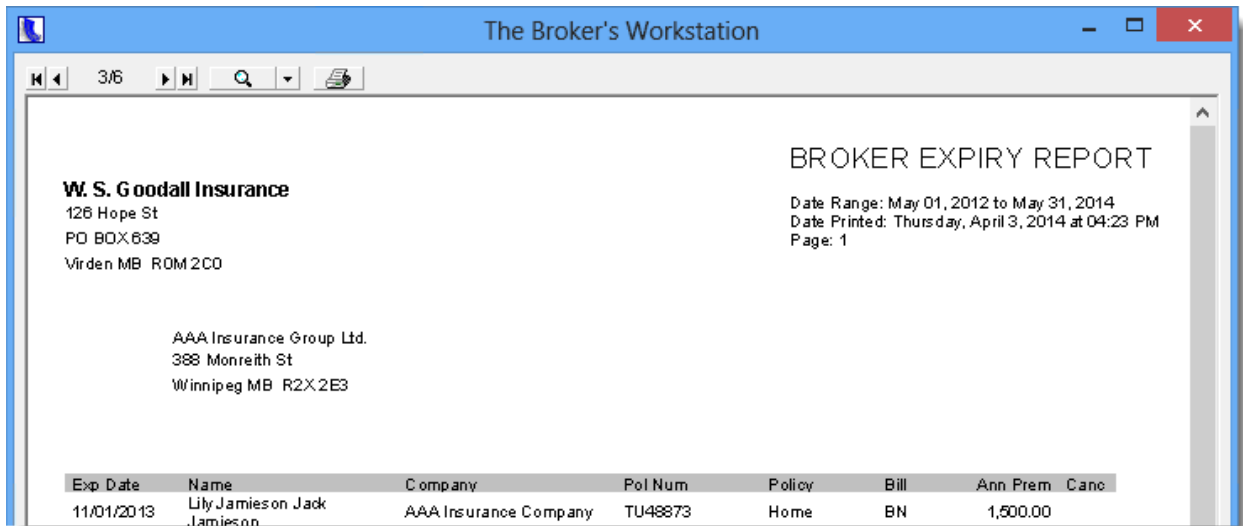
(Figure 1.4)



If **Print Preview** is enabled (through Tools, Options, Printing in the TUW window), first preview and then print the report.

When the **Broker Expiry Report** option is selected for printing, each individual Broker Expiry Report will display on a new page with appropriate header information. Policy details in this report include *Expiry Date, Insured Name, Company, Policy Number, Policy Type, Bill Type, Annualized Premium, and Cancelled (yes/no)* (see Figure 1.5).

(Figure 1.5)



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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 (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

Gold Independent Software Vendor (ISV)