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

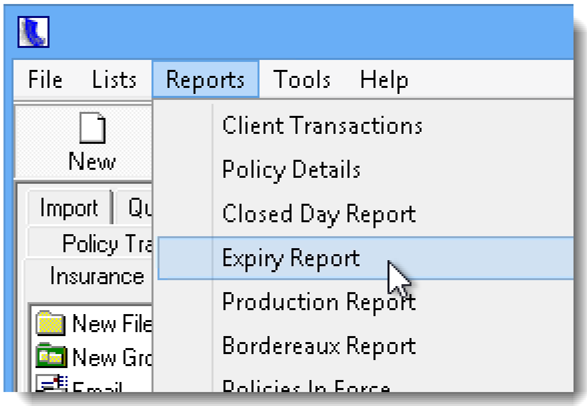
Contents

1. Filter the Expiry Report by Bill Type

In response to requests from our clients, the Expiry Report has been enhanced with the ability to filter the report by Bill Type.

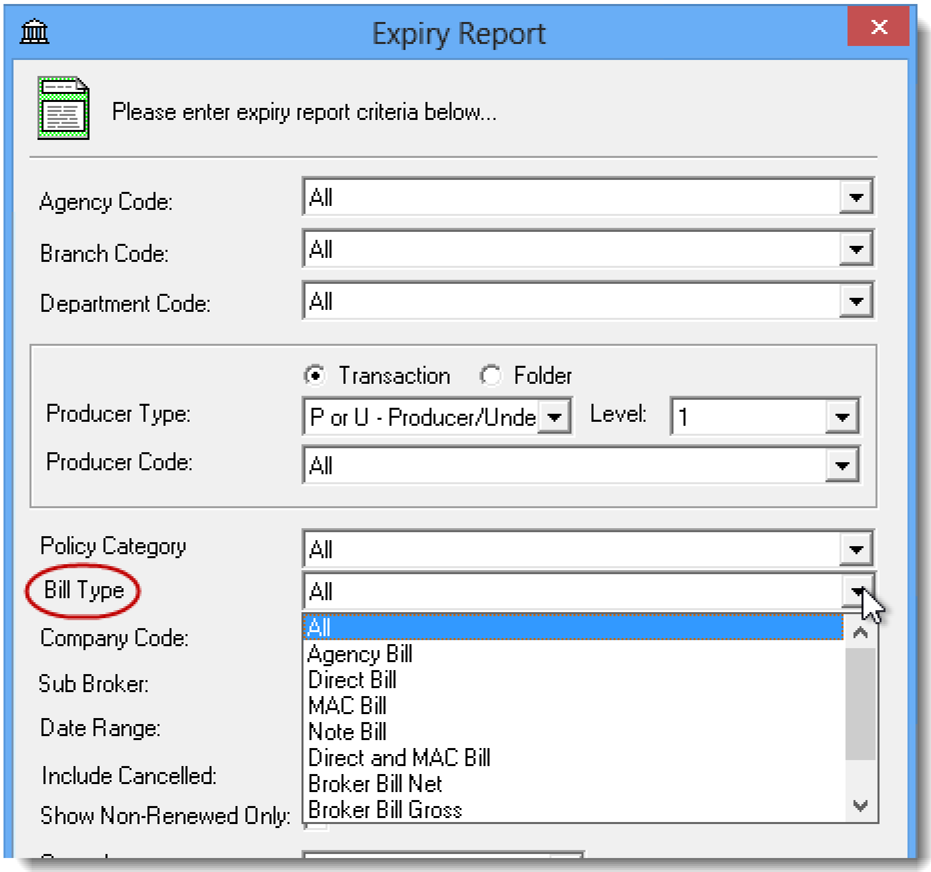
To create an Expiry Report, click **Reports**, **Expiry Report** (see Figure 1.1).

(Figure 1.1)



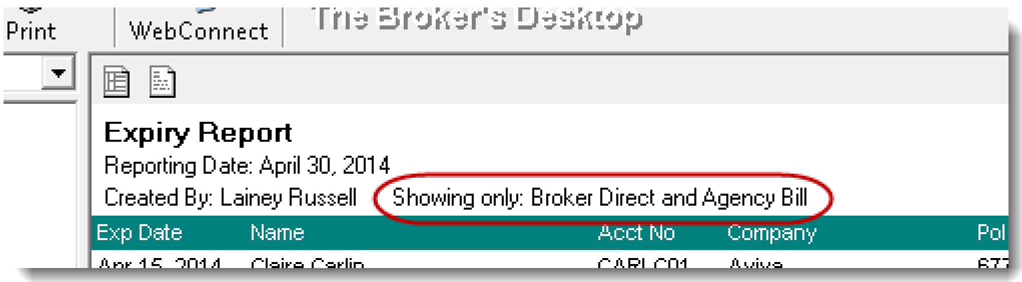
In the **Expiry Report** dialog, enter report criteria as required. Note that the **Bill Type** filter parameter has been added to the Expiry Report dialog (see Figure 1.2).

(Figure 1.2)



After entering all report criteria, click the **View** button to generate the report. If a Bill Type filter has been applied, the selected bill type(s) will be identified in the report window (see Figure 1.3). The corresponding bill type for each transaction will display as usual in the **Bill** column in the report results.

(Figure 1.3)



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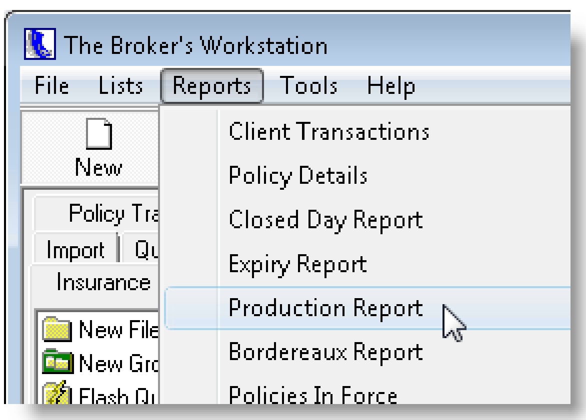
2. Insured Province included in Production Report

In response to requests from our clients for Production Report information by province, we are pleased to announce that an "Insured Province" filter parameter is now available in the Production Report. When the Detail Report Type is selected, the Insured's province will display in the report output, as well.

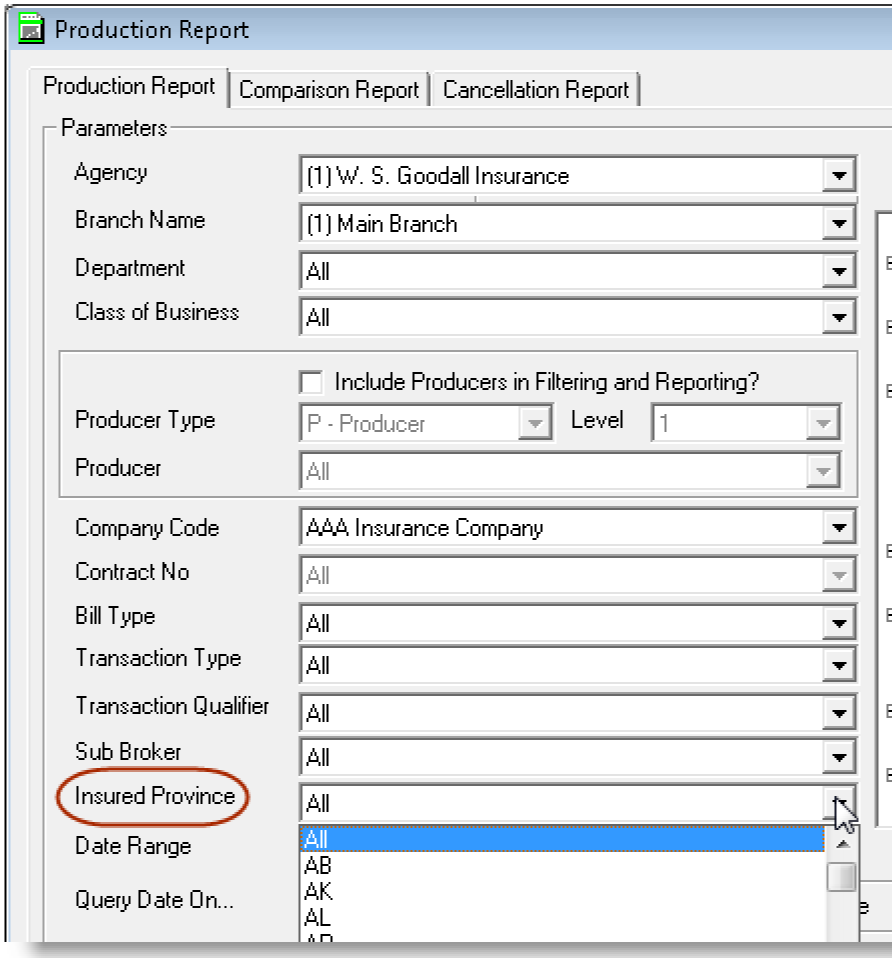
To create a Production Report, click **Reports**, **Production Report** (see Figure 2.1).

(Figure 2.1)



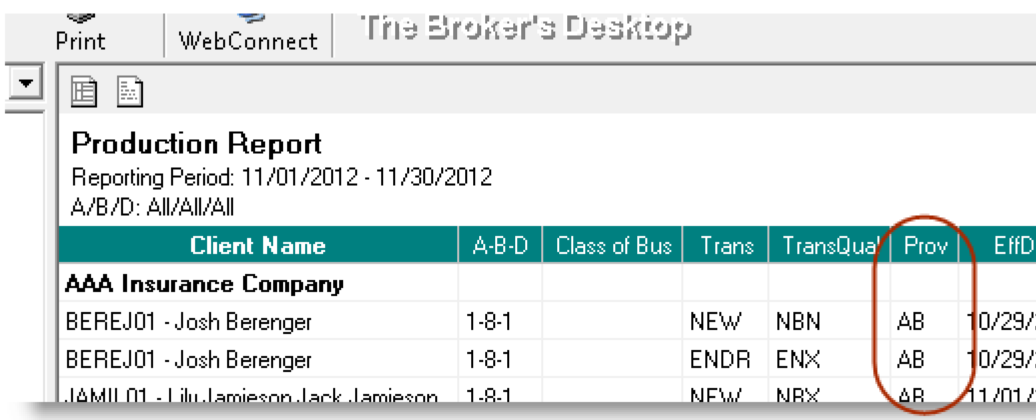
In the **Production Report** form, note that **"Insured Province"** is now available for selection as a report parameter (see Figure 2.2). To apply the Insured Province from the Client folder address as a report filter, simply select the applicable province or state abbreviation from the drop-down menu.

(Figure 2.2)



When all required parameters, options, and a report type have been selected, click **View** to create the report and view it in the Document Window (see Figure 2.3). Note the Insured Province will display when the **Detail Report Type** has been selected.

(Figure 2.3)



Details regarding the Insured Province will also display in the printed Detail Production Report and when this report is exported to Microsoft Excel. Click the **Print** button on the TBW/TUW toolbar to print the report; to export the report to Excel, click **Tools**, **Export**, **Excel**.

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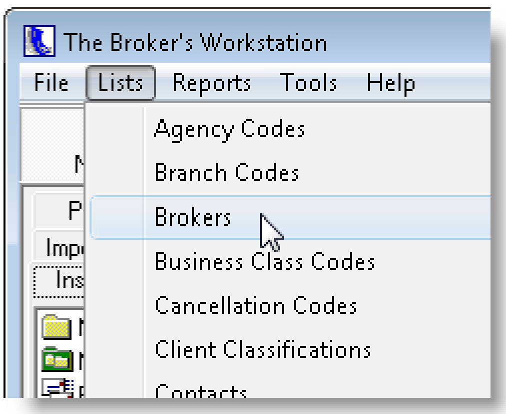
3. Email Addresses in TBW/TUW Lists

Applicable email addresses will now display in the TBW/TUW Lists dialog and will be included with Lists details exported to Microsoft Excel.

To view email addresses in the **Lists** dialog, click **Lists** in the TBW/TUW window, and select the target List Item (see Figure 3.1).

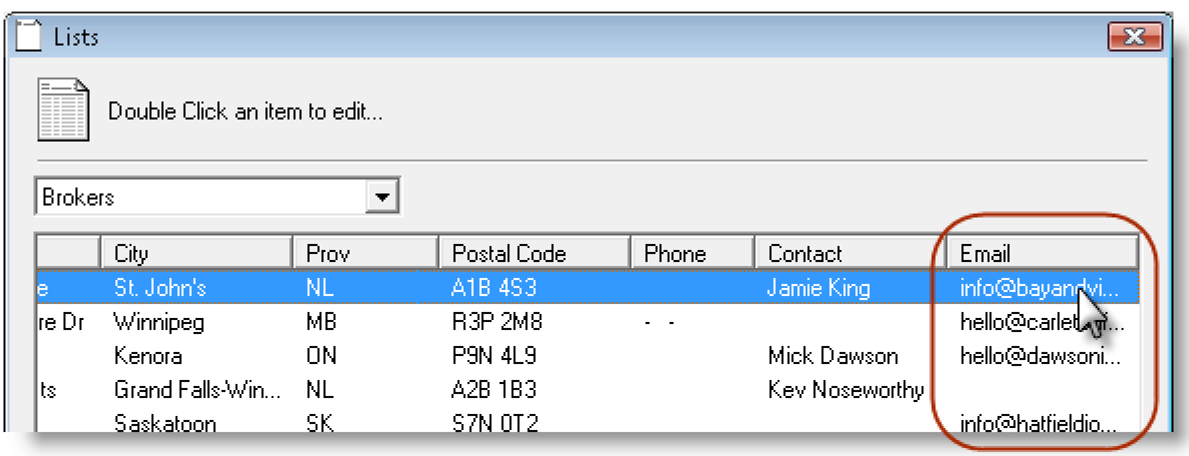
(Figure 3.1)

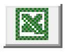


Email addresses are displayed in the **Email** column (see Figure 3.2).

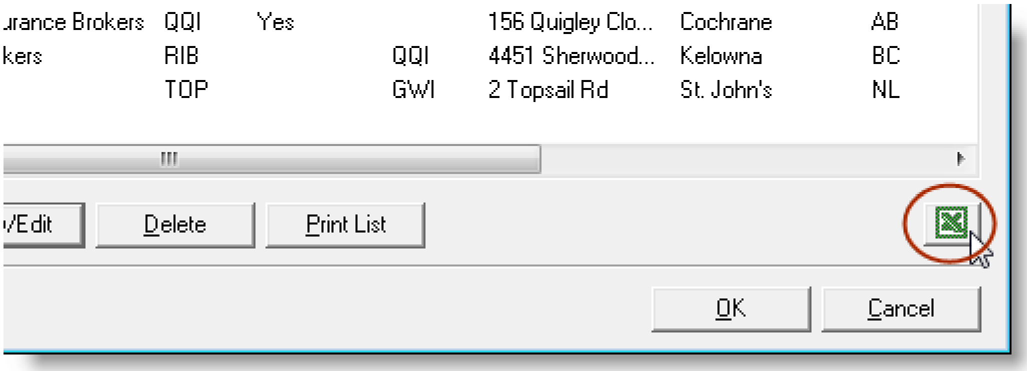
- Note that email addresses are only available for those TBW/TUW Lists with Address details displayed in the Lists dialog.

(Figure 3.2)



Relevant email addresses will also be included with Lists exported to Microsoft Excel. To export a List to Microsoft Excel, click the **Export to Excel**  button in the Lists dialog (see Figure 3.3).

(Figure 3.3)



Please note that the ability to export List Items to Microsoft Excel is controlled by **User Rights** for **Printing** for the applicable List item (through Tools, Administrative, User Manager, Rights).

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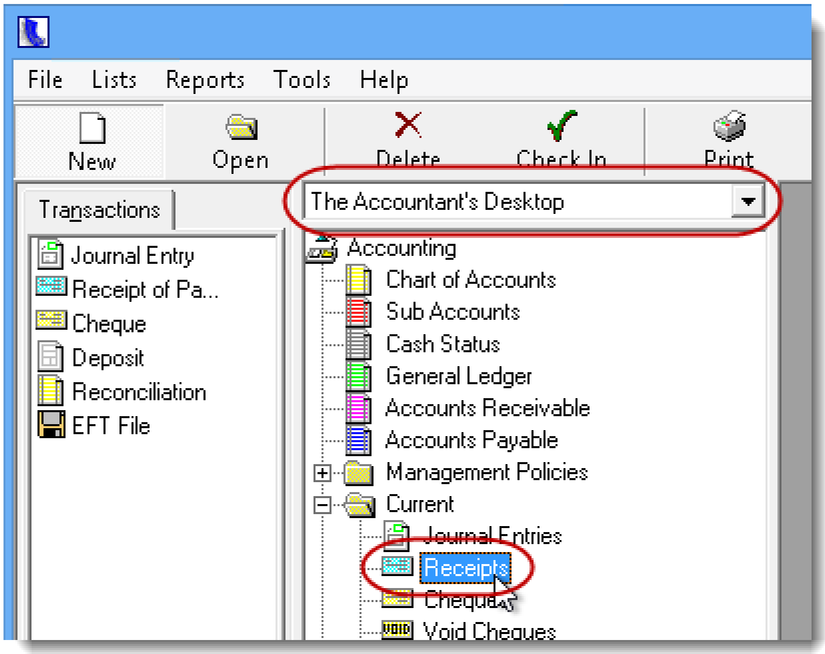
4. View Client Receipts in Current Receipts List

Until now, the Current Period Receipts list displayed G/L Receipts for the current month. With this enhancement, the Current Receipts list will now also include client receipts for the current month.

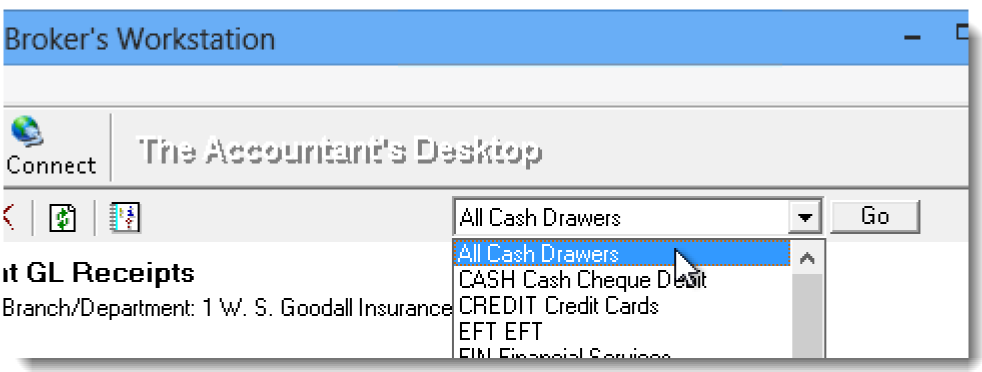
To view Current Receipts, move to **The Accountant's Desktop** and double-click **Receipts** in the **Current Tree** (see Figure 4.1).

(Figure 4.1)



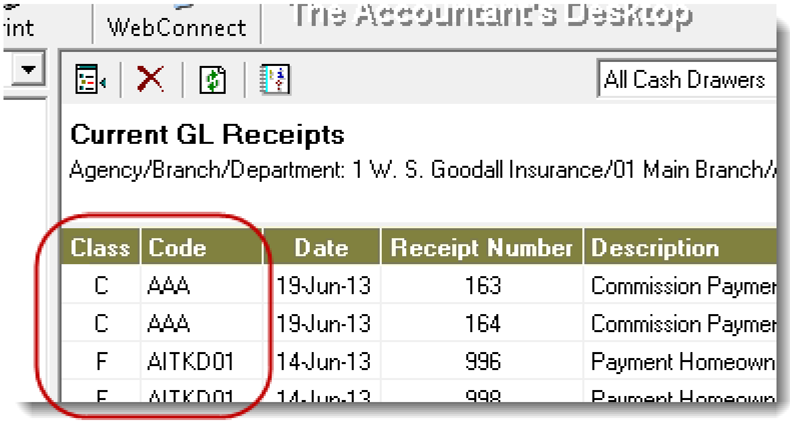
Select the applicable **Cash Drawer(s)** from the drop-down menu, and click **Go** (see Figure 4.2).

(Figure 4.2)



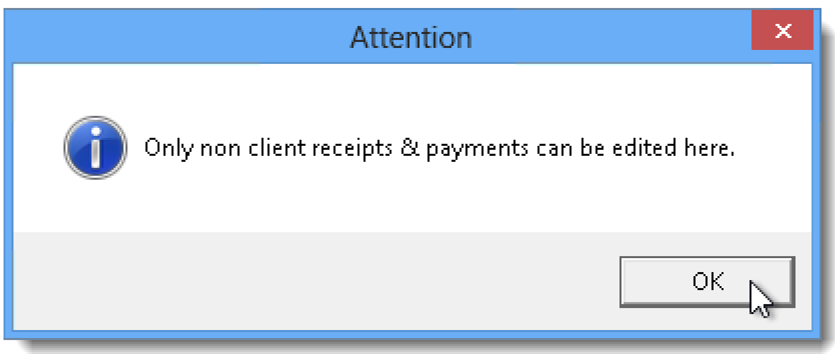
All applicable G/L and client receipts for the current month will display in the Receipts list (see Figure 4.3).

(Figure 4.3)

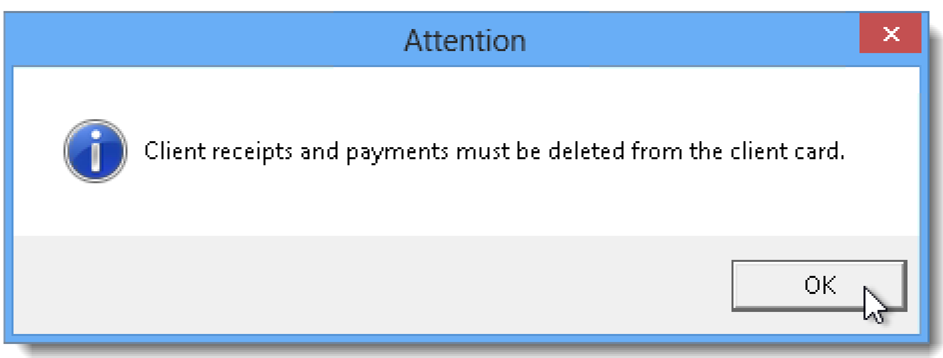


Please note that, while client receipts are visible in the Current Receipts list, they cannot be opened, modified, or deleted from this list. If the user attempts to open or delete a client receipt from the Current Receipts list, a prompt will display to remind the user that client receipts must be managed from the client's Ledger Card in the usual manner (see Figures 4.4 and 4.5).

(Figure 4.4)



(Figure 4.5)



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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 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.

Microsoft Partner
Gold Independent Software Vendor (ISV)