



24 July 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)**:

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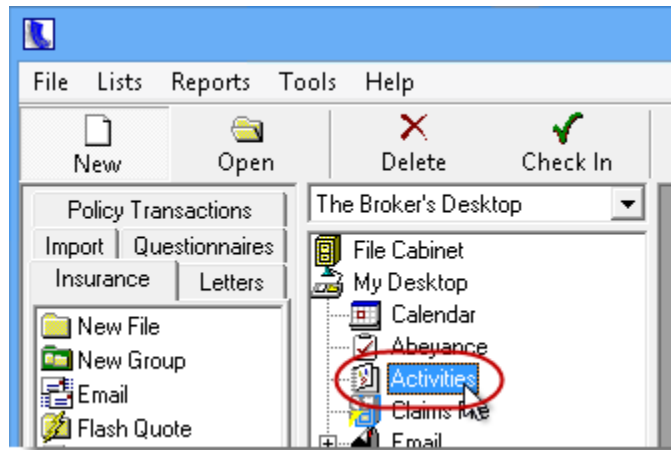
1. **[Export to Excel and Columns Functionality in the Activity Report](#)** – In the Activity Report dialog, click the Columns button to choose which columns to view and which to print. The Activity Report can now also be exported to Microsoft Excel, if required, for additional use and analysis.
2. **[Documents List Search Tool](#)** – The Documents list search tool, which allows the TBW/TUW user to search for specified text in a selected column on the Documents tab in Folder Details, is particularly helpful in locating a specific item in a large Client or Broker folder.
3. **[Set Default Broker Codes per ABD](#)** – Set a default Broker Number for each ABD (Agency/Branch/Department) within the organization, as required.
4. **[Match CSIO Downloads with Requesting Documents](#)** – CSIO Endorsement, Cancellation, and Reinstatement downloads will now be matched automatically to corresponding requesting documents.
5. **[Enhanced Dec Page Management for eDocs](#)** – Management of eDoc Dec pages has been enhanced, allowing the TBW user to move downloaded Dec pages from one policy to another in the Desktop Tree, select Master Dec pages for policy transactions, and more.

# 1. Export to Excel and Columns Functionality in the Activity Report

The Activity Report has been enhanced with the Columns button, which enables the TBW/TUW user to select which columns to view in the report and which to include when report results are printed. The Export to Excel button has also been added to the report, allowing for quick and easy export of the report to Microsoft Excel.

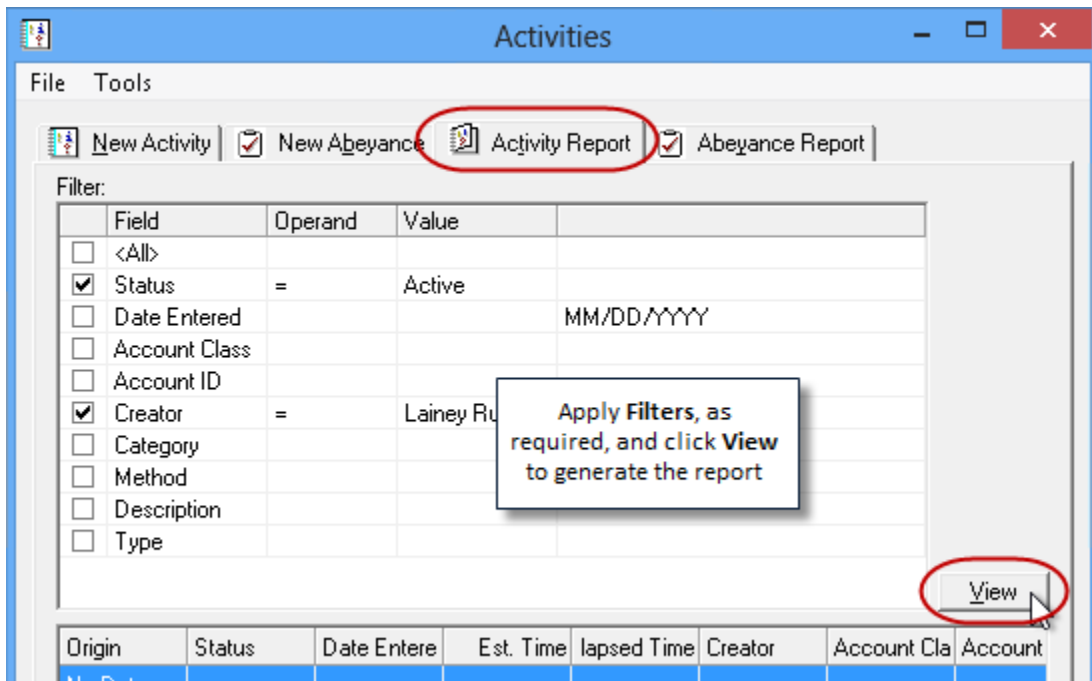
To create an Activity Report, double-click **Activities** in the **Desktop Tree** (see Figure 1.1).

(Figure 1.1)



On the **Activity Report** tab in the **Activities** dialog, apply **Filters** as required, and click the **View** button to generate the report (see Figure 1.2).

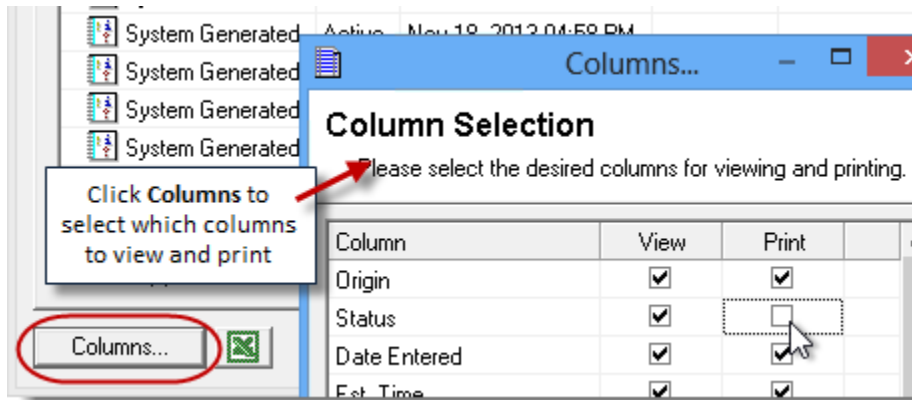
(Figure 1.2)




Report results will display in the lower area of the window. To select which columns will display in the report and which columns will be included in the printed report, click the **Columns** button. In the **Column Selection** dialog that opens, select desired columns to view and print (see Figure 1.3), and click **OK**.

- Note that these selections will remain in place until adjusted by the user.

(Figure 1.3)



To export the report results to Microsoft Excel for additional use and analysis, click the **Export to Excel**  button (see Figure 1.3). In the **Save As** dialog, select the **Location** to save the file, enter the **File name**, and click **Save**.

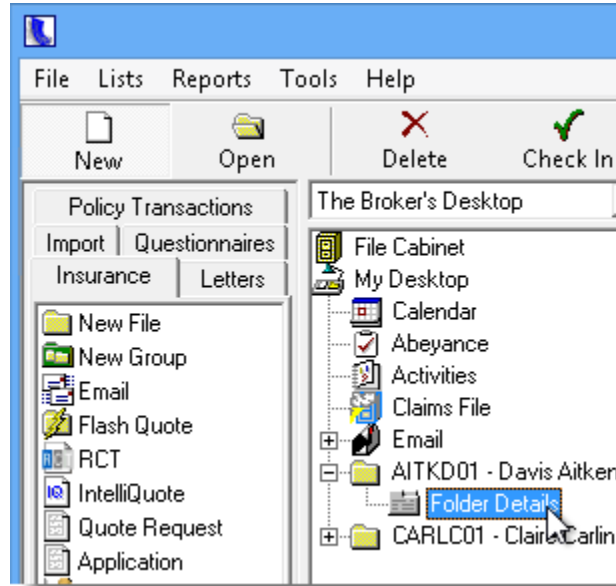
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## 2. Documents List Search Tool

The Documents list search tool, which allows the TBW/TUW user to search for specified text in a selected column on the Documents tab in Folder Details, is particularly helpful in locating a specific item in a large Client or Broker folder.

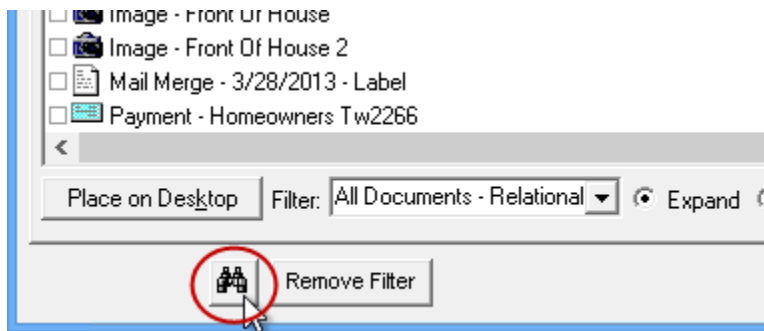
To view this feature, first double-click **Folder Details** in the Desktop Tree to access the Documents list (see Figure 2.1).

(Figure 2.1)



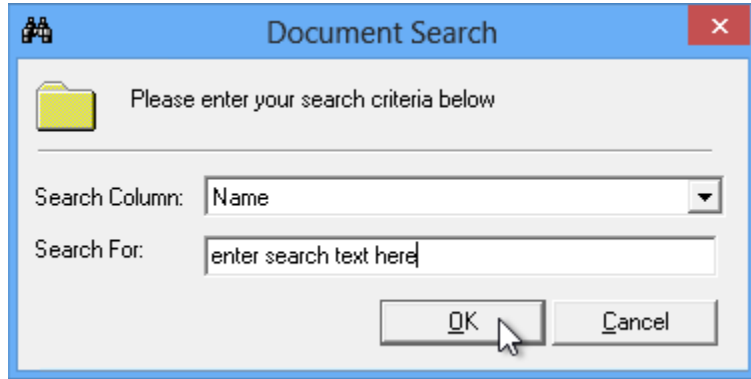
On the **Documents** tab in the **Folder Details** dialog, click the **Search**  button in the lower area of the window (see Figure 2.2).

(Figure 2.2)



In the **Document Search** form 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 2.3). The Documents list will reload, displaying only items meeting those parameters.

(Figure 2.3)



Click the **Remove Filter** button (see Figure 2.2) to restore the full Documents list or to clear search results before performing another search.

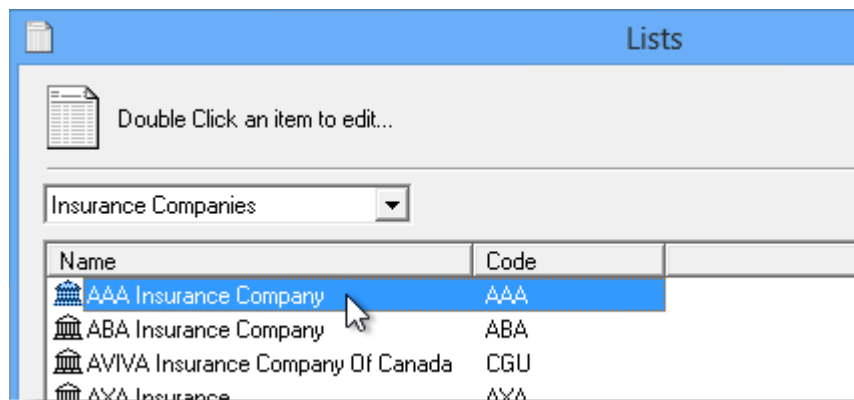
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### 3. Set Default Broker Codes per ABD

Until now, TBW/TUW users have had the ability to assign one Broker Number as the default. With this enhancement, a default Broker Number can now be set for each ABD (Agency/Branch/Department) within the organization, as required. For example, if your organization has three branches, a default Broker Number can be assigned for each of these branches, if necessary.

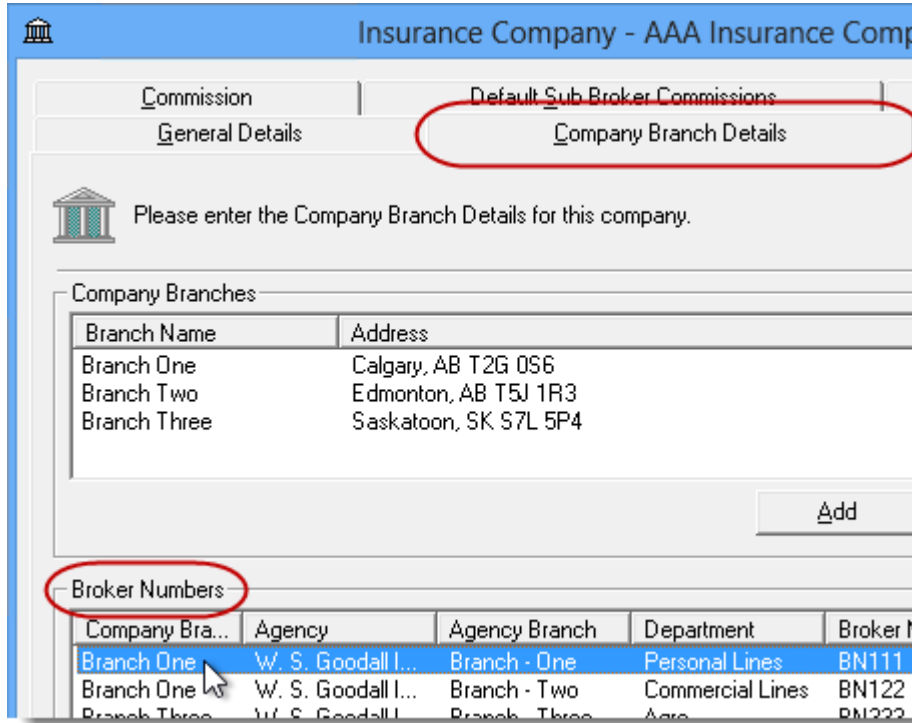
To designate a Broker Number as default, click **Lists, Insurance Companies** in the TBW/TUW window. In the **Insurance Companies** dialog, find and double-click the applicable Insurance Company (see Figure 3.1).

(Figure 3.1)



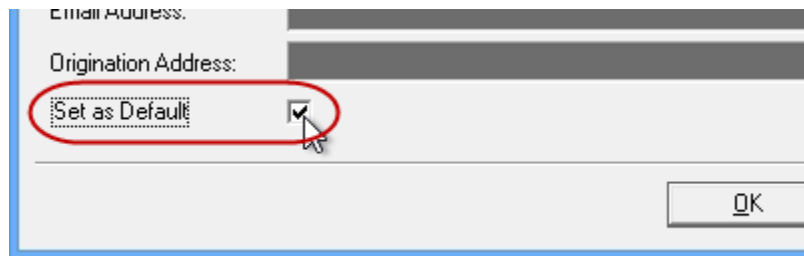
On the **Company Branch Details** tab in the Insurance Company dialog, double-click the applicable item in the Broker Numbers section (see Figure 3.2).

(Figure 3.2)



In the **Broker Number Details** dialog, select the **Set as Default** checkbox, and then click **OK** (see Figure 3.3).

(Figure 3.3)



Set additional default numbers, as required. One default number can be assigned to each ABD, as required (see Figure 3.4).

(Figure 3.4)

Company Bra...	Agency	Agency Branch	Department	Broker Number	Default
Branch One	W. S. Goodall I...	Branch - One	Personal Lines	BN111	Yes
Branch One	W. S. Goodall I...	Branch - Two	Commercial Lines	BN122	
Branch Three	W. S. Goodall I...	Branch - Three	Agro	BN333	Yes
Branch Two	W. S. Goodall I...	Branch - Two	Personal Lines	BN221	
Branch Two	W. S. Goodall I...	Branch - Two	Commercial Lines	BN122	Yes

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## 4. Match CSIO Downloads with Requesting Documents

We are pleased to announce an enhancement to the CSIO download procedure that will automatically match CSIO Endorsement, Cancellation, and Reinstatement downloads with corresponding requesting documents.

With this feature, the CSIO download process will proceed as usual. As CSIO Endorsement, Cancellation, and Reinstatement documents are being downloaded, they will be assessed and matched with requesting documents based on Policy Number, Effective Date, and Expiry Date.

If a match is found, the CSIO download document will be attached as a child document of the corresponding requesting document. Downloaded documents will be available to the user on the **Documents** tab in the client's **Folder Details** (see Figure 4.1).

- If the requesting document already has a downloaded document attached to it, the new download will attach instead to the policy root (the main parent document).

(Figure 4.1)

Name	On Tree	Created	Eff Date	Exp Date	Revised	Created By
Tenant Policy WAH034	No	Oct 20, 2009	Oct 01, 2009	Oct 01, 2010	Aug 31, 2012	CSIO
Renewal - Home Renewal 10-11			Oct 01, 2010	Oct 01, 2011	Aug 31, 2012	CSIO
Home And Auto Renewal 10-11					Aug 31, 2010	Administrator
Renewal - Tenants Ren 11-12			Oct 01, 2011	Oct 01, 2012	Aug 31, 2012	CSIO
Tenants/Auto Ren 11-12					Sep 01, 2011	Administrator
Endorsement Request	No	Apr 26, 2012	Oct 01, 2012	Oct 01, 2013	Aug 31, 2012	Administrator
Endorsement - (CSIO) Request	No	Apr 26, 2012	Oct 01, 2012	Oct 01, 2013	Aug 31, 2012	CSIO
Endorsement Request	No	Apr 26, 2012	Oct 01, 2012	Oct 01, 2013	Aug 31, 2012	Administrator
Endorsement Request	No	Apr 26, 2012	Oct 01, 2012	Oct 01, 2013	Aug 31, 2012	Administrator

Please note the following regarding CSIO downloads and requesting documents:

- If a downloaded document happens to attach to an incorrect requesting document, the user can manually move the document to the appropriate location.

- If a downloaded document should fail to save to TBW, this incident will be recorded in the Error Log at the end of the download procedure.

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## 5. Enhanced Dec Page Management for eDocs

Management of eDoc Dec pages has been enhanced, with changes to how a downloaded Dec page is viewed and moved. With this program update, a user can now move Dec pages from one policy to another in the Desktop Tree, select Master Dec pages for policy transactions, and more.

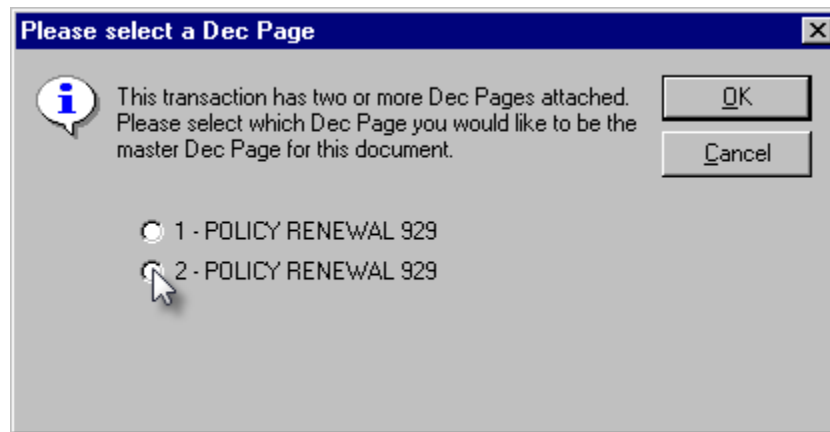
### Viewing a Dec Page

Previously, when a downloaded policy included both a Dec page and image(s), the Dec page would automatically display on the **Images** tab in the open policy document. Now, the Dec page will display on the **Dec Page** tab when the policy document is open in the Document Window.

Multiple downloaded Dec pages can be attached to a single policy transaction, as required. While each of these Dec pages will be displayed on the Documents tab in the client's Folder Details, only one Dec page (i.e. the 'Master' Dec page) will be displayed on the **Dec Page** tab when the policy is open in the Document Window. Whenever you click the **Dec Page** tab, you will be prompted to select which Dec page currently attached to the policy transaction should be the Master Dec page and display on the Dec Page tab (see Figure 5.1).

- Only Dec pages attached directly to the policy transaction will display in the **Please select a Dec Page** box. Dec pages attached to the Master Dec page will not display in this box.
- If only one Dec page is attached to the policy, that Dec page will automatically be considered the Master Dec page, and no prompt will display.

(Figure 5.1)

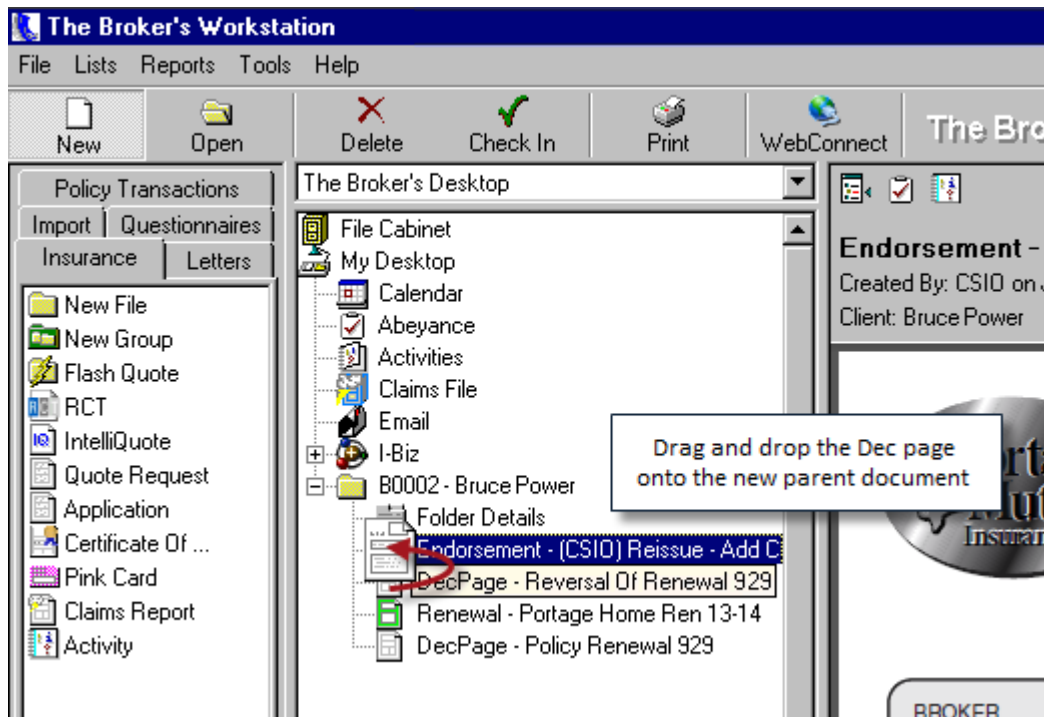


### Moving a Dec Page

When a downloaded Dec page is on the Desktop Tree, it can be attached to another document on the Tree simply by dragging and dropping the Dec page onto the other document (see Figure 5.2). The Dec page will become a child document of the other (parent) document.



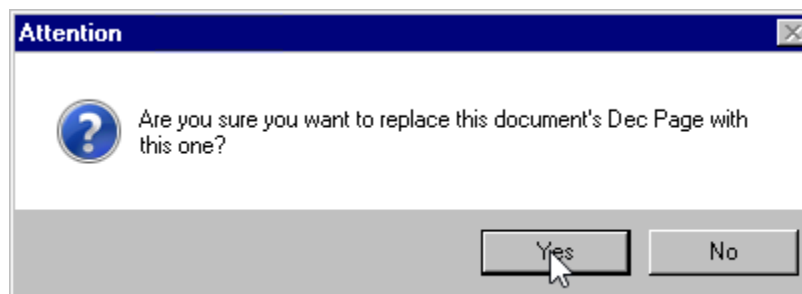
(Figure 5.2)



If the target document already has an attached Dec page, you will be asked if you want to replace the existing Dec page with the new Dec page (see Figure 5.3).

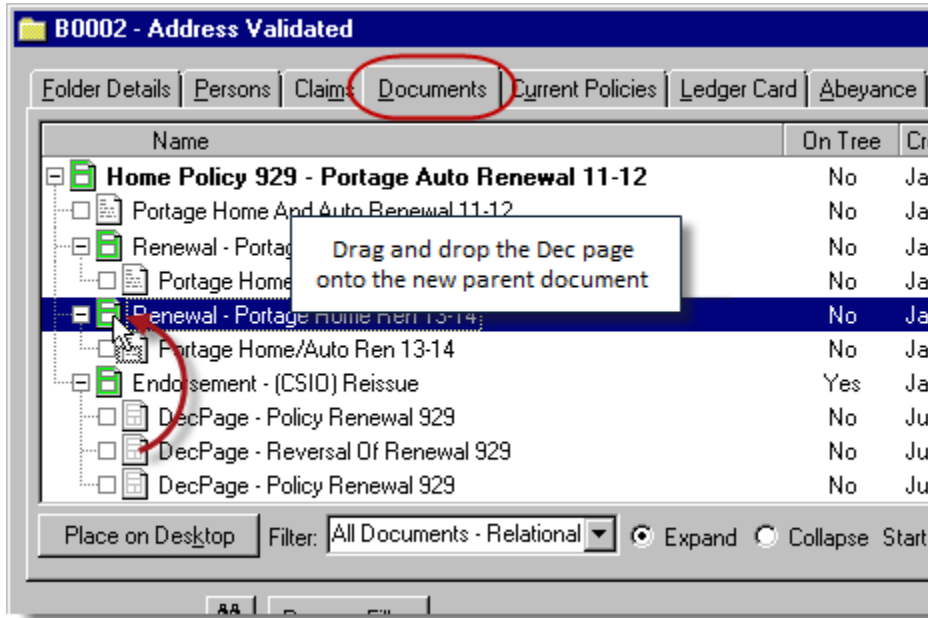
- Click **Yes** to assign the new Dec page as the Master Dec page for this policy transaction. The previous Master Dec page will still be attached to the policy transaction and can be viewed on the Documents tab in Folder Details.
- Click **No** to leave the existing Master Dec page in place. The new Dec page will still be attached to the policy transaction and will display on the Documents tab as a child of that transaction, but it will not be shown on the Dec Page tab as the Master Dec page.

(Figure 5.3)



Downloaded Dec pages can also be moved from one policy transaction to another on the **Documents** tab in **Folder Details**. Simply drag the Dec page from its current location and drop it on the target parent document (see Figure 5.4).

(Figure 5.4)



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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](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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Gold Independent Software Vendor (ISV)