



20 June 2017

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. [Billing Type Column added to Processed CSIO/I-Biz Report](#) – A new column providing Policy Billing Type information has been added to the Processed CSIO/I-Biz Report.

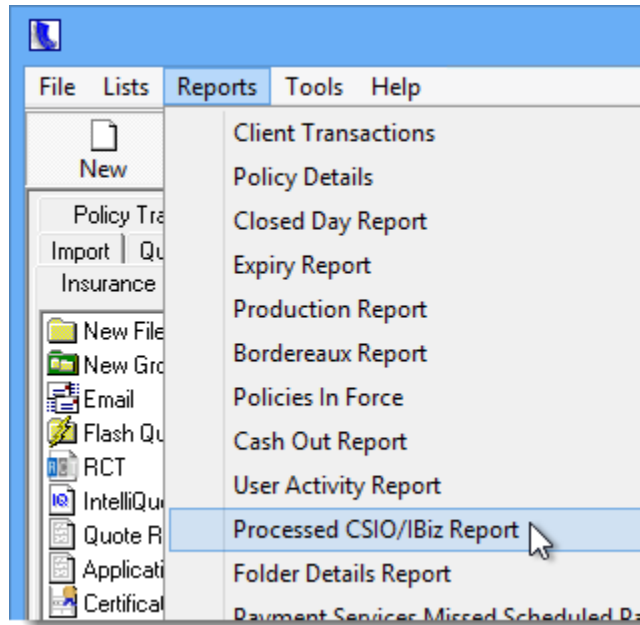
1. Billing Type Column added to Processed CSIO/I-Biz Report

A new column providing Policy Billing Type information has been added to the Processed CSIO/I-Biz Report. This additional information may be useful in helping the user determine how to prioritize report results.

The **Processed CSIO/I-Biz Report** displays processed I-Biz and CSIO policies within a selected date range, providing the TBW user with information necessary to track and transact a processed transaction prior to receiving the paper copy of the policy.

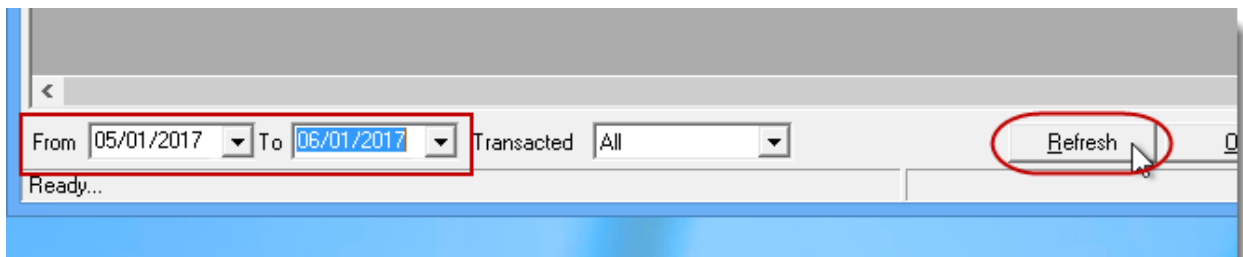
To generate a Processed CSIO/I-Biz Report, click **Reports, Processed CSIO/IBiz Report** in the TBW window (see Figure 1.1).

(Figure 1.1)



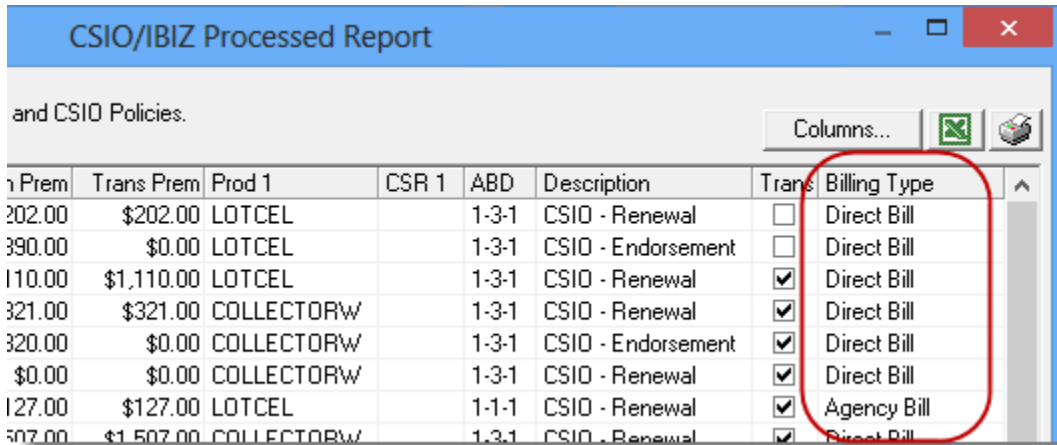
Then, in the **CSIO/IBiz Processed Report** dialog, enter the target date range for processed policies using the **From Date** and **To Date** fields, and click the **Refresh** button.

(Figure 1.2)



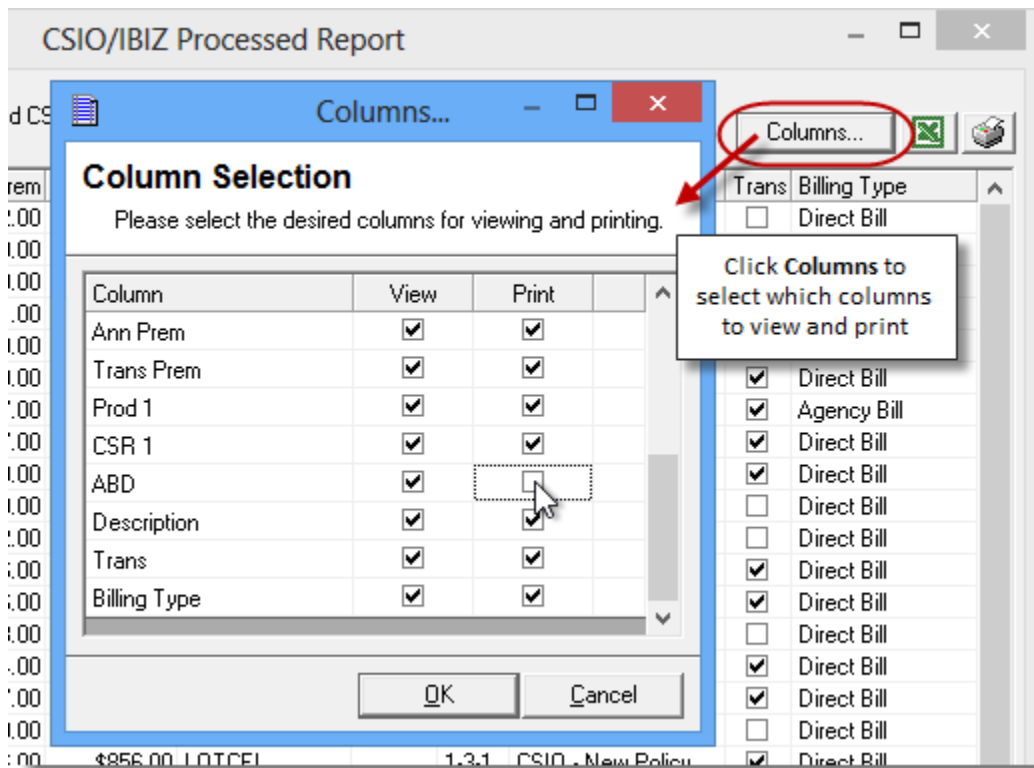
Policies processed during the selected date range will display in the resulting report. Note the new **Billing Type** column that displays at the far end of the report (see Figure 1.3).



(Figure 1.3)



In the report window, click the **Columns** button to open the **Column Selection** dialog and select which columns to view in the report and which to display in the printed report (see Figure 1.4). Note that these selections will apply until adjusted by the user.

(Figure 1.4)



If you would like to print the report results, click the **Print**  button. To export the report results to Microsoft Excel for further use and analysis, click the **Export to Excel**  button.

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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)

To unsubscribe from our email notifications and updates, please contact us at info@cssionline.com or reply to this email.