



17 March 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

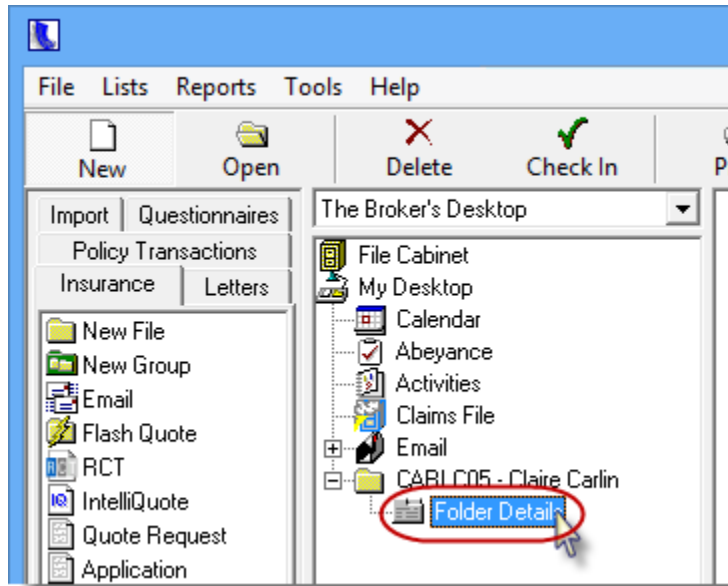
1. [Improved Sorting of Claims List in Folder Details](#) – Once the Claims List in Folder Details has been sorted in ascending or descending order, that sorting selection will apply until changed by the user.
2. [Bordereaux Report Enhancements \(TUW\)](#) – For our TUW users, the Bordereaux Report has been enhanced with additional options and features.

1. Improved Sorting of Claims List in Folder Details

Once the Claims List in Folder Details has been sorted in ascending or descending order (e.g. by Loss Date), that sorting selection will apply each time Folder Details is opened, until changed by the user.

To view this enhancement, double-click **Folder Details** in the Desktop Tree (see Figure 1.1).

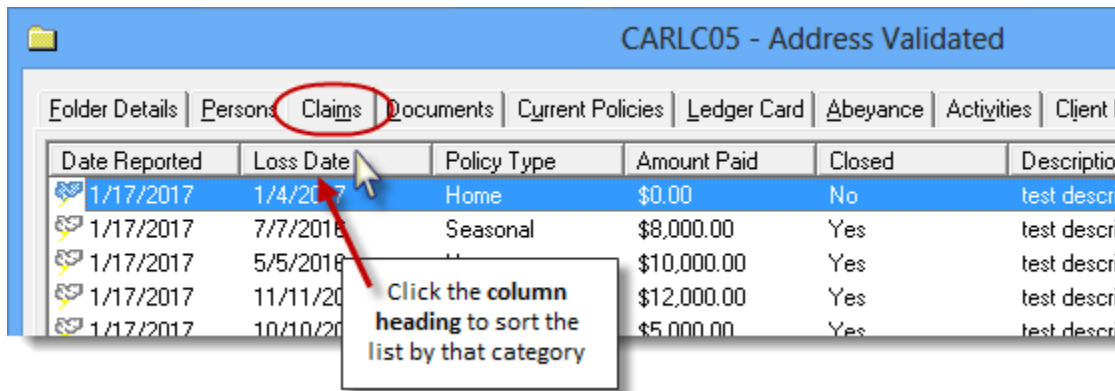
(Figure 1.1)



On the **Claims** tab in Folder Details, click a column heading to sort the list of claims by that category (see Figure 1.2).

- To sort the list in reverse order, click the column heading again.

(Figure 1.2)



The selected sort order will apply the next time Folder Details is opened. This setting can be adjusted by the user at any time, as needed.

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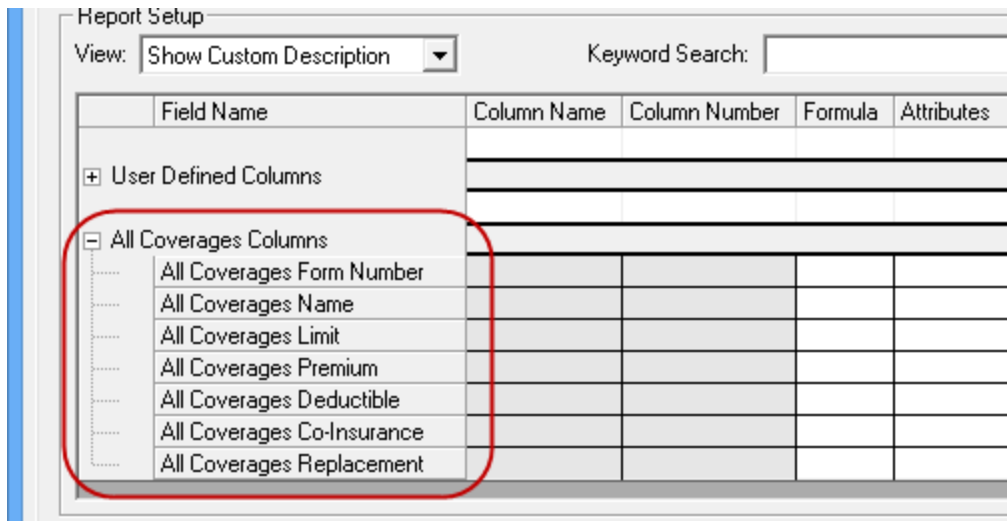
2. Bordereaux Report Enhancements (TUV)

For our TUV users, the Bordereaux Report has been enhanced with a number of additional options and features, including All Coverages and Subscription Commissions options when setting up a new report, as well as the ability to generate a report based on the transaction Accounting Date.

On the **New Report** tab in the **Bordereaux Report** dialog, additional options are now available for report setup, including the following:

- An **“All Coverages Columns”** section, which includes All Coverages Form Number, Name, Limit, and more (see Figure 2.1). Add applicable selections in this section when setting up the report template, and report results will include this information for each Coverage associated with any of the policies.

(Figure 2.1)



- Applicable **“Subscribed Commission Amounts”** are also available for inclusion when setting up a new Bordereaux Report (see Figure 2.2). One field will display for each Subscription Subsection.

(Figure 2.2)



Previously, the Bordereaux Report was generated based on the Effective Date of the policy transaction. Now, the TUW user can generate the report based either on the Effective Date or the Accounting Date of the transaction.

To generate a Bordereaux Report based on the transaction Accounting Date, create the report in the usual manner, ensuring the **Search by Accounting Date** checkbox on the **Generate Report** tab is selected (see Figure 2.3).

- To generate the report based on the Effective Date of the transaction, leave this checkbox deselected.

(Figure 2.3)

Bordereaux Report

New Report **Generate Report** Lineage

Please select the bordereaux report you wish to generate below...

Report Name: Aviva AP Pending Report: 58 - CGU - test new Description (04/01...)

Date Range: 04/01/2016 To 08/01/2016 MM/DD/YYYY Search by Accounting Date

Generate Report

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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.