December 22, 2004

To: The Broker's Workstation Users

Dear Valued Client:

Re: The Broker's Workstation – Important Releases and Changes

Custom Software Solutions Inc. (CSSI) is pleased to announce the release of the following enhancements and new features to its The Broker's Workstation product.

Within folder details on the documents tab a user will now see 3 new controls on the bottom of the display. The new controls are Filter Dropdown, Expand and Collapse radio buttons, and Start Date. We will elaborate on these features below. Other changes within the documents tab include Policy Transactions showing effective dates on all views, columns will change to include only relevant data depending on view selected, rollover tool tips to ease navigation and view, and we have implemented rules to facilitate consistent document descriptions.
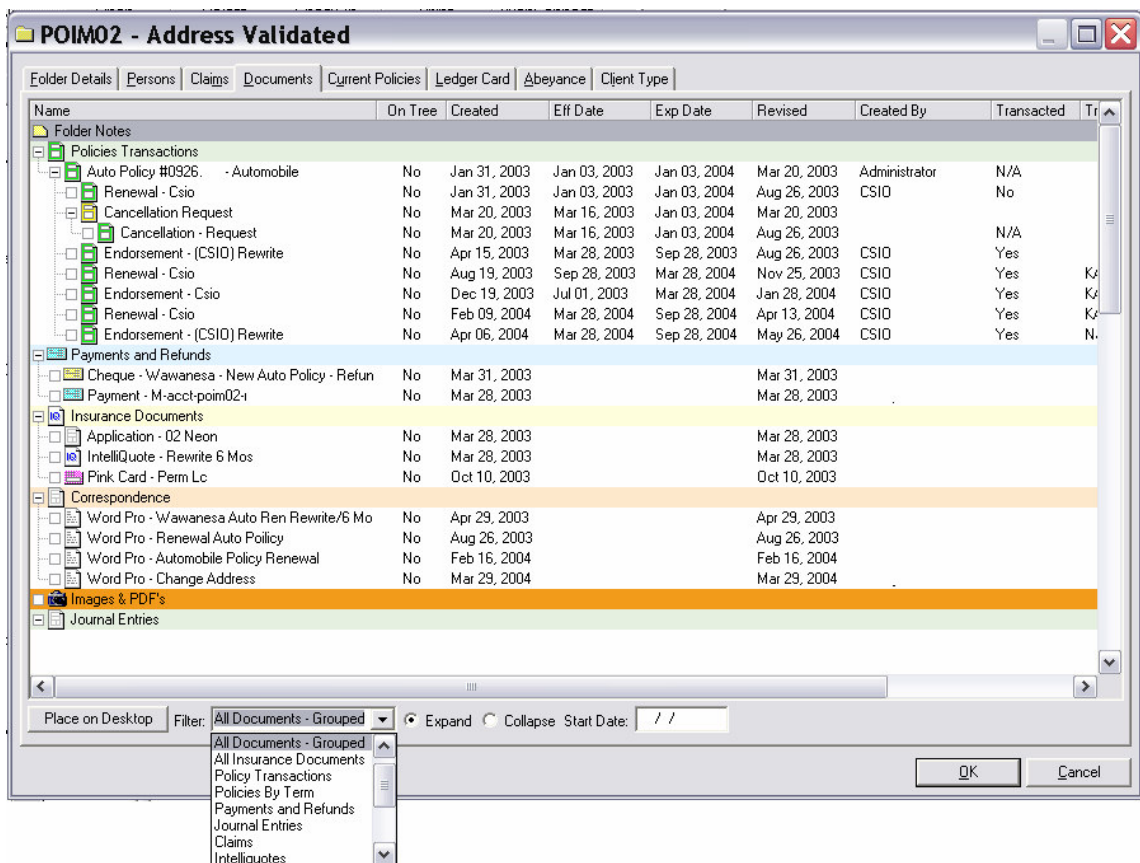
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The **Filter Dropdown control** allows as user to choose the view they would like to work in. The choices are as follows:

- All Documents
- All Documents - Grouped (Groups docs by doc type)
- All Insurance Documents (shows IQ, Home Evaluators, Apps and Pink Cards)
- Policy Transactions (Just policies and related docs)
- Payments and Refunds
- Journal Entries
- Claims
- Intelliquotes
- Home Evaluators (Boeckh, RCT)
- Applications
- Pink Cards
- Correspondence (Letters, Memos, WordPro docs)
- Images and PDF's (Pictures, PDF's and persisted docs)
- Email
- Policies by Term
  - This view is similar to the "Policy Transactions" view except documents are sorted by term. There's only 3 levels on each policy - Level 1 is Parent Policies, Level 2 is Policy Terms, and Level 3 is each Doc in Term (sorted by date created) If you have a policy that's been in force since Jan 1, 2000 you're view will be like this:
    - Home Policy #123456
      - -[Jan 1, 2000 to Jan 1 2002]
        - Home Policy
        - Endorsement
        - Endorsement
      - -[Jan 1, 2002 to Jan 1 2003]
        - Renewal
        - Endorsement
        - Adjustment
      - -[Jan 1, 2003 to Jan 1 2004]
        - Renewal
        - Endorsement
  - By default old terms are collapsed and new terms are open so when a user first look at this view it will look like this:
    - Home Policy #123456
      - +[Jan 1, 2000 to Jan 1 2002]
      - +[Jan 1, 2002 to Jan 1 2003]
      - -[Jan 1, 2003 to Jan 1 2004]
        - Renewal
        - Endorsement

The **expand and collapse radio buttons** allow the user to perform both functions on all views.

The **start date** control allows a user to only show documents from the date selected forward.

Folders that are checked out on a desktop will now list in alphabetical order.

An express checkout feature has now been added. This feature allows a user to right click a document on the document tree and select express checkup. This selection will check out the document and place it on the users desktop, closes the folder allowing the user to view the document all in one click.
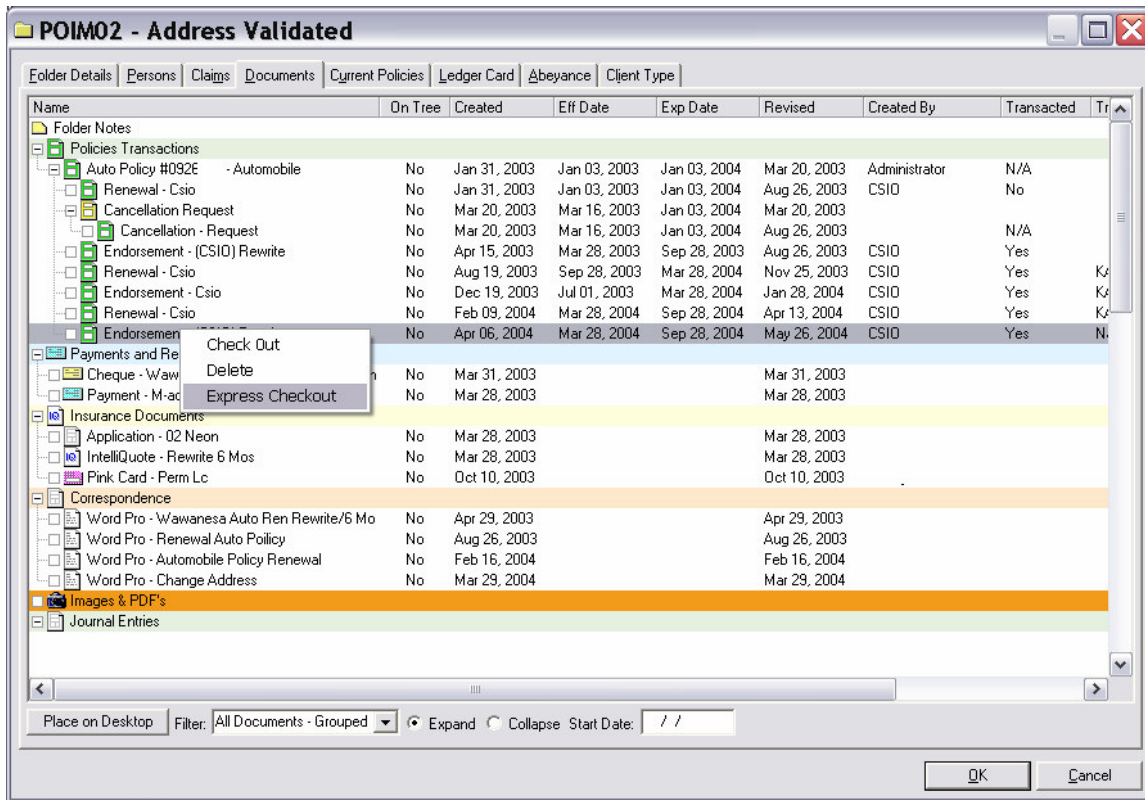
The following are enhancements and changes to the **RCT:**
- January 2005 cost data updates have been implemented.
- A user can now apply an "adjustment factor" to increase or decrease the overall value of a RCT. At the bottom of the input screens there is a box called "adjustment factor" and a positive or negative value can be added. This factor will be added and displayed in both the Summary and Detailed reports along with the following disclaimer: **"MS/B does not endorse the use of "User Adjustments" and encourages the use of the true Replacement Cost value. Please consult your Insurance Carrier."**
- In the Property Details screen a 10' ceiling category has been added. Please note that the 8', 9', and 10' categories must equal 100%. A user would then fill in the appropriate cathedral ceiling % if applicable.
- In the Interior Details screen within the Ceiling section a user can now add a % for acoustical tiles.
- In the Additional Features screen within the Porches/Breezeways section a user can now add a screened porch.

Please run the TBW Remote Update Utility to access these changes. For assistance in using these new features, please contact our Support Team at 1-888-291-3588.

Please share this information with all TBW users in your office(s) and thank you for using TBW.

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Yours truly,

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