



21 January 2009

**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 newest features to **The Broker's Workstation (TBW)**:

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1. [Filter a File Cabinet Search by Client Classification](#) – Apply a client classification filter to a File Cabinet search to ensure that only client folders assigned that particular classification will appear in the search results. A client's classification details now also appear in the client folder's General Info.
2. [Production Report – Filter Transactions by Accounting Date](#) – The TBW user can now filter Production Report results by Accounting Date to ensure the report will align with financial reports for the same time period.
3. [Access the WebConnect Icon on ING Policy Documents](#) – Click the WebConnect icon on an ING policy document to access the client's information on the ING website directly from the TBW interface.
4. [Use Sub-Templates in Word Processing Documents with the Commercial Component of TBW](#) – The commercial user can now insert sub-templates into template documents, allowing detailed and replicating information about commercial coverage items, fleets, and/or locations in word processing documents.

## 1. Filter a File Cabinet Search by Client Classification

In response to requests from TBW users for increased ability to manage and organize client folders, we are pleased to announce an enhancement to **The Broker's Workstation** that allows users to filter File Cabinet searches by folder classification.

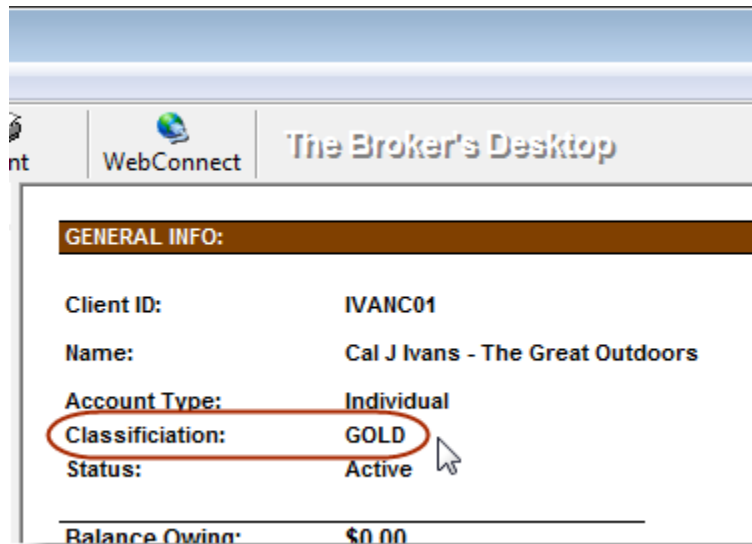
The Client Classification feature allows the TBW user to define specific folder categories through the Lists menu (**Lists, Client Classifications**), and then apply these classifications to client folders to assist in folder management and organization. A classification can be assigned to a particular folder as the folder is being created, or through **Folder Details** on the **Client Info tab** (see Figure 1.1).

(Figure 1.1)

The screenshot shows the 'Client Info' tab for client 'IVANC01'. The 'Client Info' tab is circled in red. The 'Classification' dropdown menu is also circled in red, and a mouse cursor is pointing at the 'GOLD' option in the dropdown list. Other fields include Client ID, Account Type, Current Status, Status, Agency, Branch, Department, Producer/CSR 1, 2, and 3, Sub Broker, and a commission rate of 2%.

Once a classification has been assigned to a particular folder, this information will appear in the General Information view of the client folder (see Figure 1.2). Note that this detail will only appear if the client folder has been given a classification.

(Figure 1.2)



File Cabinet filters can now also be set by Client Classification. Setting filters in the File Cabinet allows you to narrow a folder search according to the filters set – e.g. by Agency, Branch, Account Type, etc. Then, only those folders that fall within the set parameters will appear during the search.

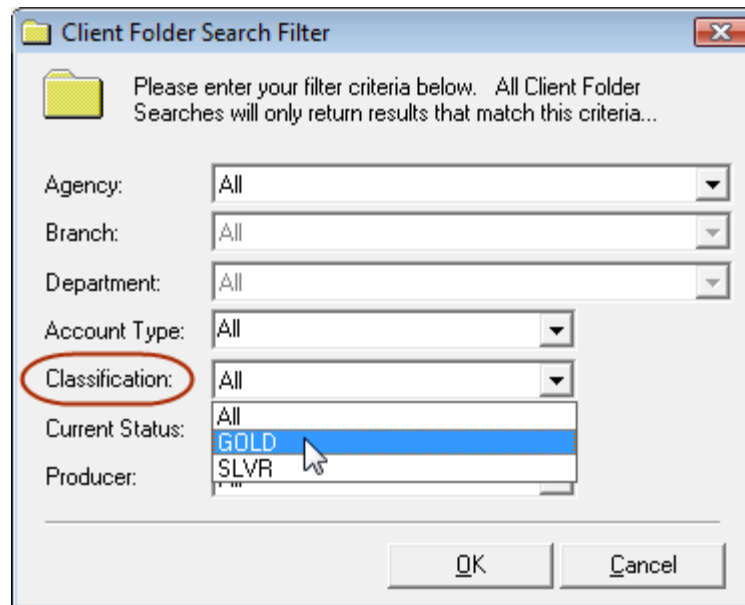
Applying a particular classification as a filter will ensure that only client folders assigned to that specific category will appear in the search results. To apply the Client Classification filter to a File Cabinet search, double-click **File Cabinet** in the Desktop Tree, and then click the **Filter** button in the **Open a File window** (see Figure 1.3).

(Figure 1.3)



Then, in the **Client Folder Search Filter window**, click the drop-down menu to select the target classification (see Figure 1.4). Apply other filters as desired, click **OK**, and then carry on as usual with the folder search.

(Figure 1.4)



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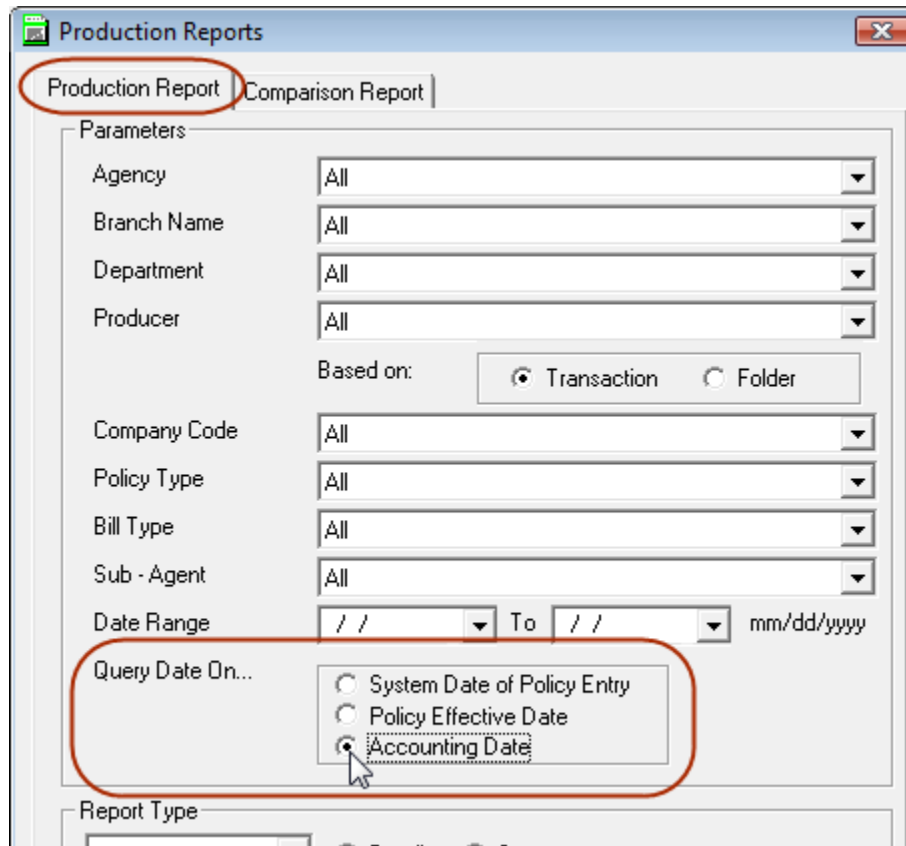
## 2. Production Report – Filter Transactions by Accounting Date

We are pleased to announce the enhancement of the TBW Production Report that allows the user to filter the report results by Accounting Date. The **Accounting Date filter** enables the generation of Production Reports that align with financial reports for the same time period.

The previous report version offered Effective Date and Creation Date filter methods. The Accounting Date method differs from the previous methods in that it represents the latter of the policy effective date and the policy transaction creation date.

To apply this new filter to a Production Report, click the **Reports menu**, and then select **Production Report**. In the Production Reports window, on the **Production Report tab**, select **Accounting Date** in the **Query Date On** section (see Figure 2.1). Apply other parameters as required, and then create the report.

(Figure 2.1)



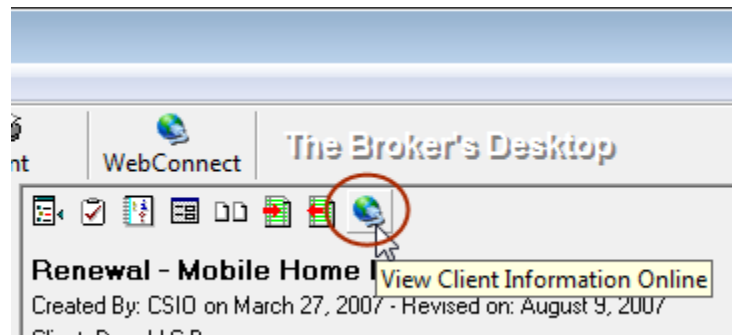
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### 3. Access the WebConnect Icon on ING Policy Documents

We are pleased to announce the addition of the WebConnect icon to the ING policy toolbar, which will allow the TBW user to access the ING website and client information directly from the policy document interface.

The WebConnect button can be found on the ING policy document toolbar (see Figure 3.1). Simply click the button to open the ING website and access client information.

(Figure 3.1)



Please be sure that you have enabled ING and entered your client Username and Password information through the WebConnect setup feature in TBW before attempting to access the ING website using this toolbar button.

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## 4. Use Sub-Templates in Word Processing Documents with the Commercial Component of TBW

We are pleased to introduce the sub-template feature for use in the commercial component of TBW as a further enhancement to TBW's word processing module.

The **Sub-Template Field** available in the **TBW Commercial Component** is a field that is used in a unique way – to insert an *entire document* (rather than just a word or phrase) into the field. The document that is inserted into the field is typically a template that will have both pre-formatted and variable components. Using this sub-template feature allows the user to insert detailed information about commercial coverage items, fleets, and/or locations easily and automatically into client communication documents, such as letters, proposals, etc. A sub-template field can also be replicated to show data for multiple locations, buildings, vehicles, and more.

There are three distinct steps in creating a template document containing sub-templates that can be used for client communication. These steps are as follows:

- a. Create or select a document to use as a sub-template,
- b. Create a template document containing one or more sub-template fields, *and*
- c. Create a document for a particular client using the newly created template.

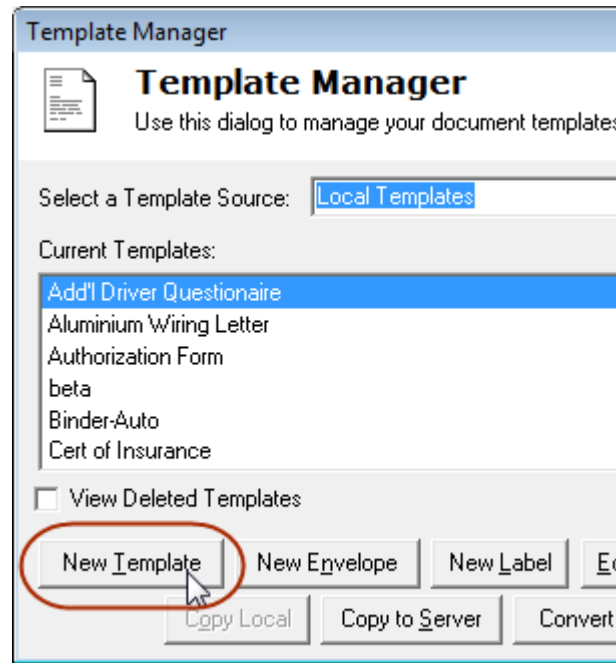
These three steps are described in detail below.

### Step One: Create or Select a Document to Use as a Sub-Template

The first step in using the sub-template feature is either to create a new document that will be used as a sub-template or to select an existing document to use as the sub-template.

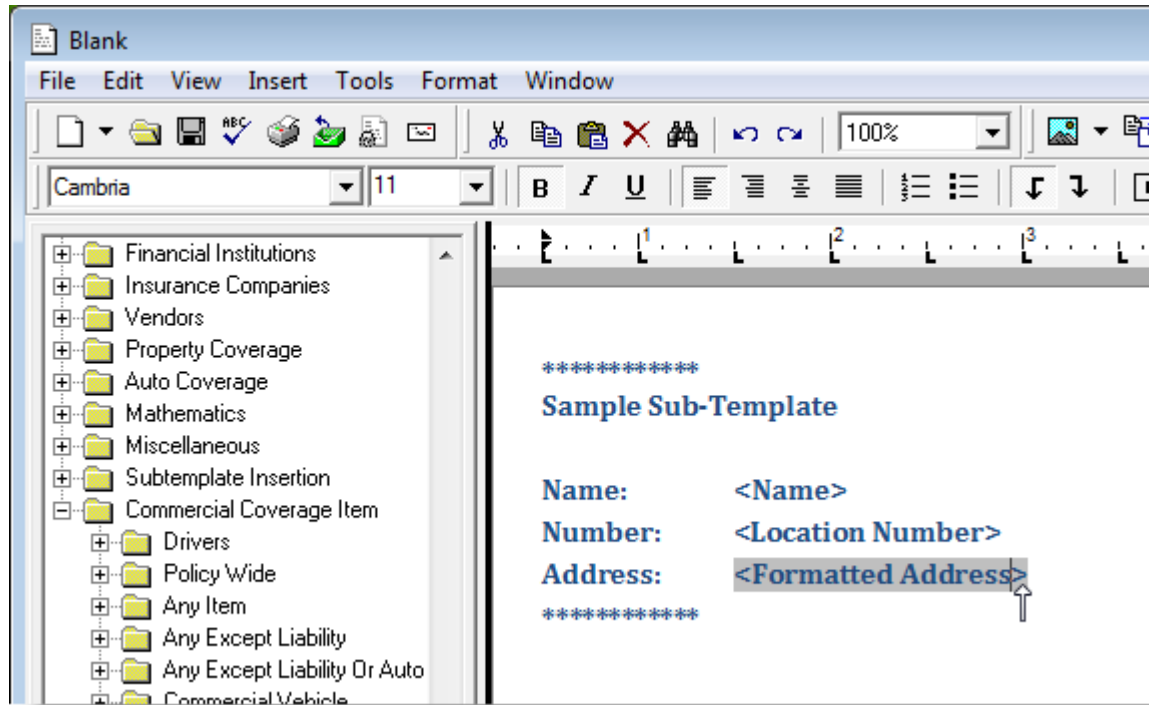
To create a new document to use as a sub-template, use the **Template Manager** (click **Tools, Template Manager**). In the Template Manager window, click the **New Template button** (see Figure 4.1).

(Figure 4.1)



Next, in the word processing window, create the sub-template document, inserting fields as needed (see Figure 4.2). Save the newly created template by clicking **File, Publish**, and then close the word processing window.

(Figure 4.2)



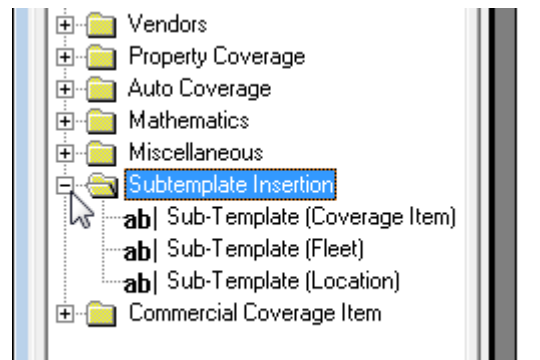
## Step Two: Create a Template Document Containing Sub-Templates

The next step in using the sub-templates feature is to create the template document that will house the new sub-template.

Click **Tools, Template Manager**, and click the **New Template** button in the Template Manager window. In the new word processing document, enter text and add formatting as you wish. When you are ready to insert the sub-template, click **Insert, Field** to view all fields, and then click the **plus (+) sign** beside **Subtemplate Insertion** to view menu options (see Figure 4.3).

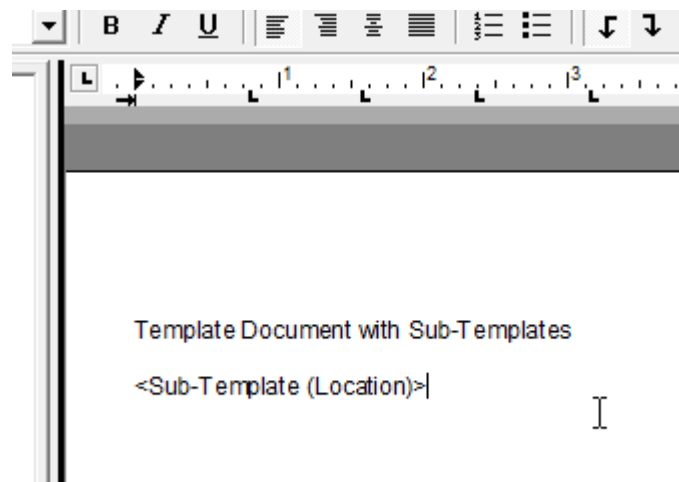


(Figure 4.3)



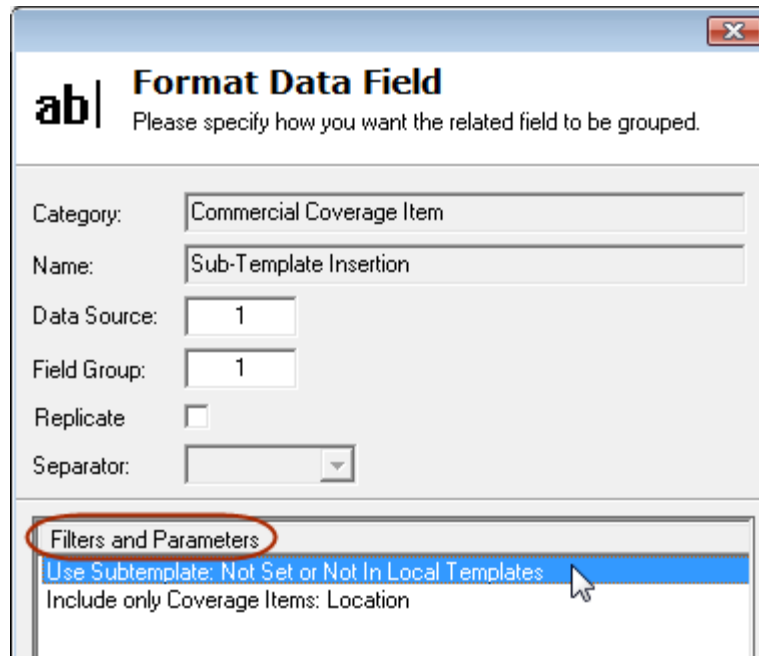
Place the cursor where the sub-template will be inserted. Double-click the appropriate **Sub-Template option**, and the field will be entered in the document (see Figure 4.4).

(Figure 4.4)



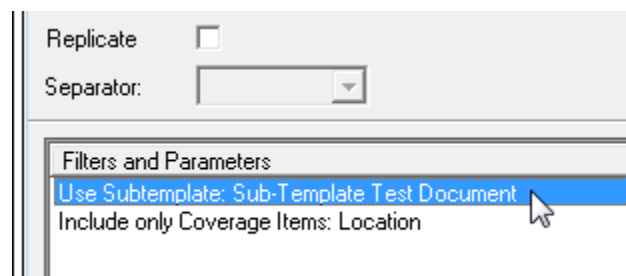
Then, double-click the **<Sub-Template> field** you've just added to the document to open the **Format Data Field window**, which will allow you to set field options for this sub-template field (such as which sub-template to use, whether or not to replicate the field, etc.). In the Format Data Field window, in the **Filters and Parameters box**, double-click the **Use Subtemplate option** in order to find and insert the sub-template document created in the previous step (see Figure 4.5).

(Figure 4.5)



In the **Template Fields** dialogue box that opens, find and double-click the sub-template document just created to insert it into the sub-template field. Note that the name of the selected sub-template will be shown in the Filters and Parameters box (see Figure 4.6)

(Figure 4.6)



Also note that the sub-template field can be replicated in a template document so that details are inserted for each applicable item. For example, if the sub-template field is replicated for each location of a business, the sub-template data will be organized and shown by location. If the sub-template is to be replicated, click in the **Replicate** checkbox and select the type of **Separator** that will be used between sub-template items (see Figure 4.7).

(Figure 4.7)

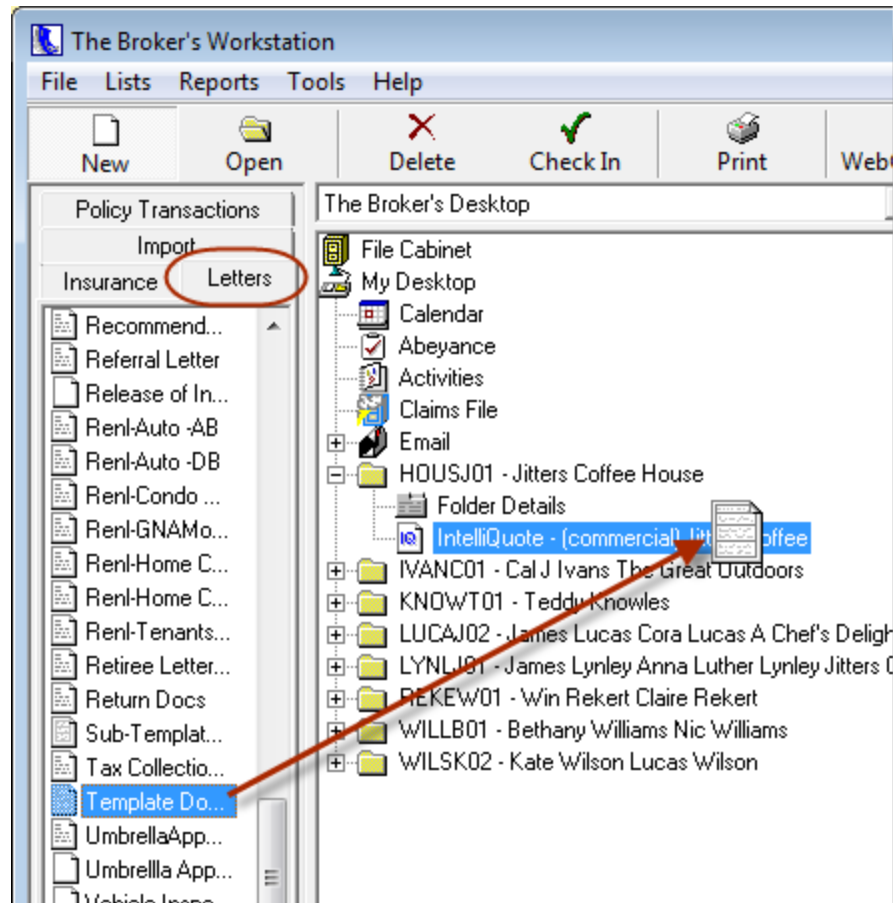
Click **OK** in the Format Data Field dialog box. At this point, you can add additional text, formatting, and even additional sub-templates to the word processing document. Then, save the newly created template document by clicking **File, Publish**. Close the word processing window.

### Step Three: Use the Template to Create a Document for a Client

Once the template document containing the sub-template has been created, the template can be used to create a personalized document for a client.

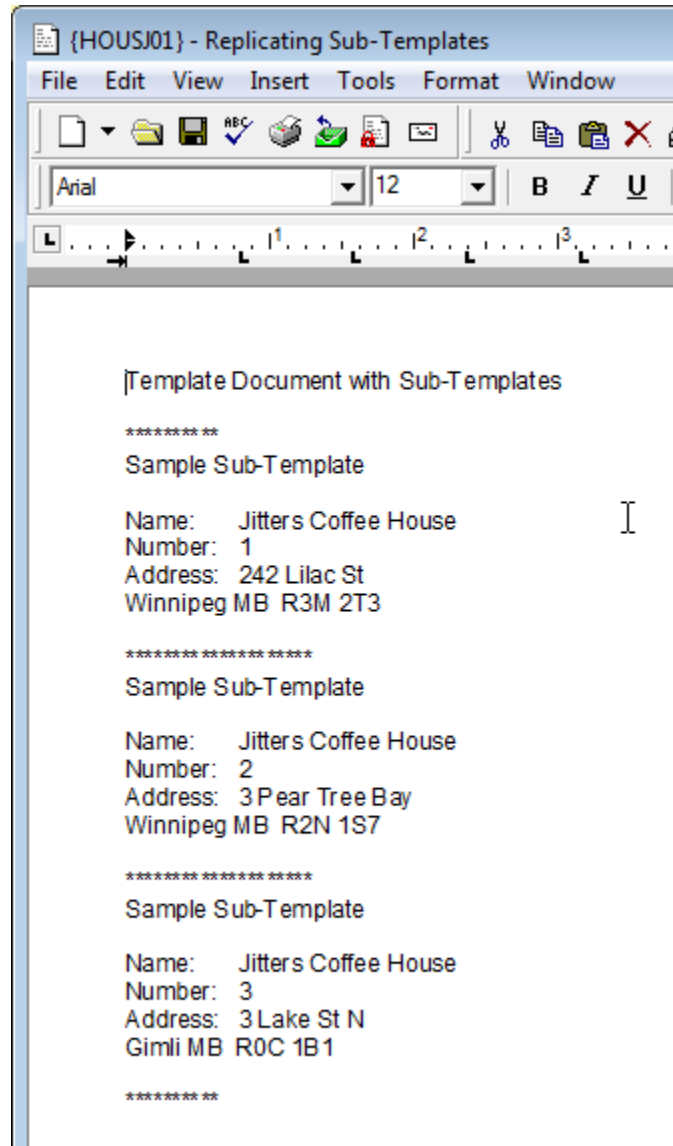
Be sure the client folder and the client's commercial IntelliQuote are checked out on the Desktop Tree. Then, drag and drop the newly created template document (containing the sub-templates) from the **Letters Tray** onto the **commercial IQ** (see Figure 4.8).

(Figure 4.8)



Work through the windows that appear, entering information as requested (e.g. the document's name, Insurance Company, etc.). The template document will then open in its own window, displaying details relevant to the particular client (see Figure 4.9). If the sub-template was replicated, the details will appear for each item.

(Figure 4.9)



When working with sub-template documents, please also note the following:

- A sub-template field can display text and/or objects (such as images or a table).
- If a change is made to the sub-template document, the sub-template will automatically update in the template document.
- Fields can also be replicated within each sub-template. For example, the description, coverage limit, and deductible can be shown for each building attached to a particular location.

*Please note that this Sub-Template feature currently works only with Commercial fields.*

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Please share this information with all TBW users in your office(s). Once you have reviewed this document, if you have any questions regarding these enhancements and features, or need further assistance in their usage, please contact our Support Team at 1-888-291-3588 (toll-free telephone).

Thank you for using **The Broker's Workstation**.

Yours sincerely,

Custom Software Solutions Inc.

