



29 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)**:

Contents

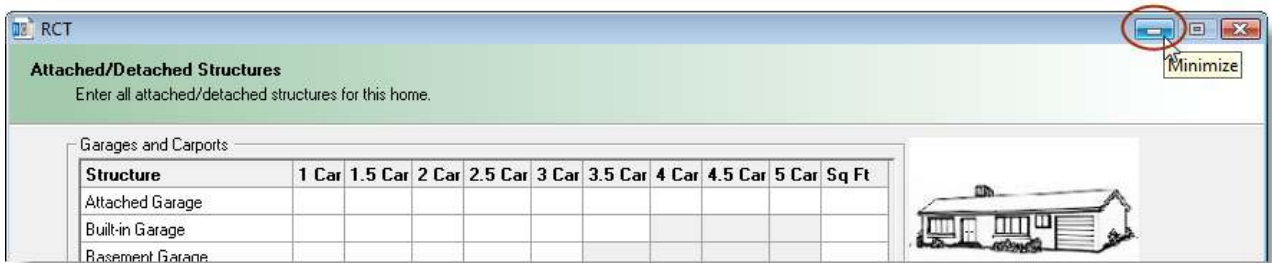
1. [Minimizing an Unfinished RCT](#) – TBW users can now minimize the RCT window while creating or editing an RCT.
2. [Minimizing an Unfinished Application](#) – This enhancement allows the user to minimize the Application window while creating or editing an Application.
3. [Expanded WebConnect Company List](#) – The list of companies accessible through the TBW WebConnect feature has been expanded.
4. [Enhanced "Insert Image" Feature in the Word Processing Module](#) – Use the enhanced **Insert Image** feature in a TBW word processing document to quickly and easily add an image to the document.

1. Minimizing an Unfinished RCT

TBW clients have asked for the ability to pause while creating an RCT to attend to another task, without losing the RCT data already entered or having to complete the document first. In response to this request from our users, we are pleased to announce an enhancement to TBW that allows the RCT window to be minimized while the document is being created or modified. With this new capability, the TBW user can put aside the incomplete RCT to open and work with another client folder, complete another task, help a client, etc., and then return to and complete the unfinished RCT at another time.

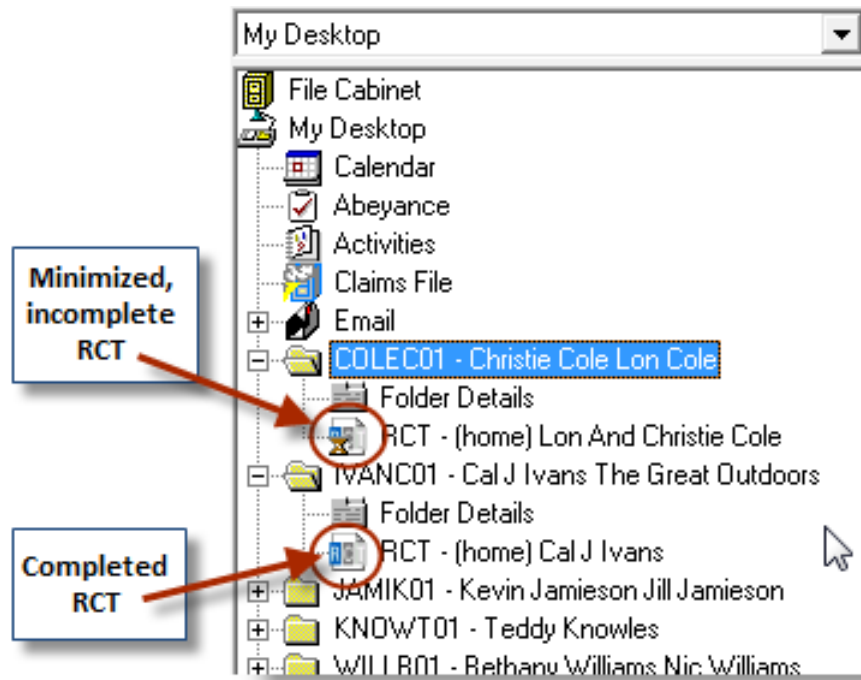
Each window of the RCT Wizard can be minimized by clicking the **Minimize button** in the top right corner of the window (see Figure 1.1). This action will save and store all details already entered in the current window, as well as all information entered in any other RCT window prior to this point.

(Figure 1.1)



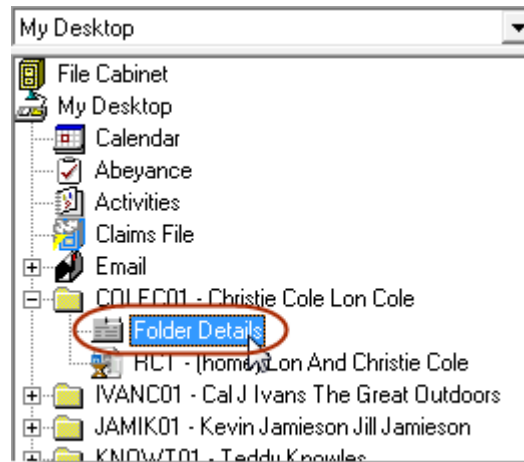
After you have clicked the Minimize button, the RCT will appear in the **Desktop Tree** with a unique icon that clearly identifies the RCT as an incomplete document (see Figure 1.2).

(Figure 1.2)

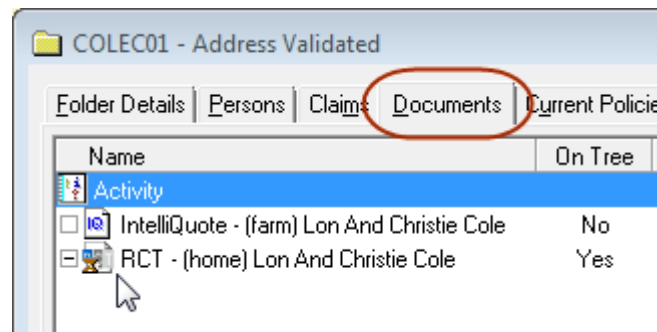


The incomplete RCT is also listed in the client's Folder Details. Double-click the client's **Folder Details** in the **Desktop Tree** (see Figure 1.3), and then click the **Documents tab** in the **Folder Details** dialogue box. Once again, any incomplete RCT listed in Folder Details will be clearly marked with an icon indicating that it is an unfinished document (see Figure 1.4).

(Figure 1.3)



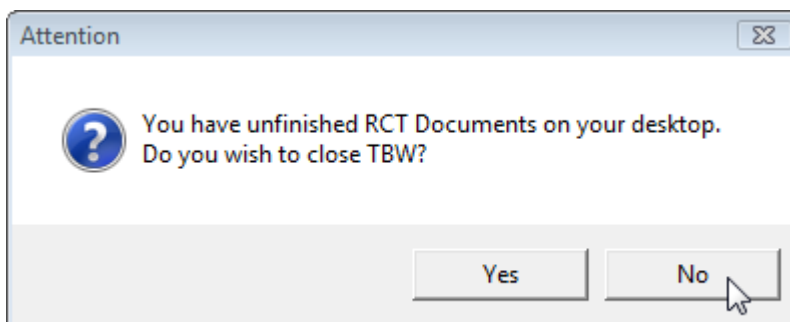
(Figure 1.4)



When the RCT document has been minimized, the TBW user can open and work with another client folder or document, exit the program to complete another task, etc. However, when an incomplete RCT has been minimized, the user **cannot** do the following:

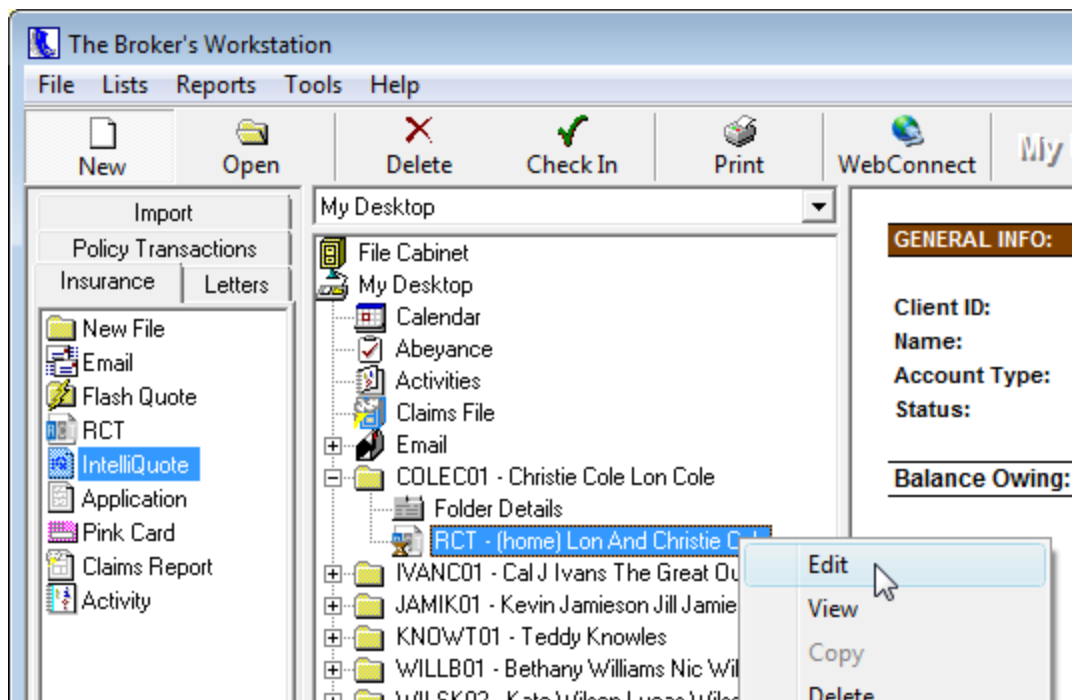
- Persist the RCT, *or*
- Drag and drop an IQ onto the RCT, *or*
- Manually check in the client folder before the RCT has been completed.
 - Note that an alert will appear if the user attempts to check in a client folder with an unfinished RCT or close the program while an RCT is incomplete (see Figure 1.5).

(Figure 1.5)



When you are ready to continue on with an unfinished RCT, either double-click the document in the **Desktop Tree**, or right-click the RCT in the Desktop Tree and then click **Edit** in the shortcut menu (see Figure 1.6). The RCT will open to the screen on which the user was last working, and all information already entered in the RCT will be visible and available to the user.

(Figure 1.6)



The Minimize feature can also be used while editing an existing RCT. If you are modifying an RCT using the RCT Wizard, but must pause during the process to complete another task, simply click the Minimize button to set the RCT aside temporarily. When an existing RCT opened for editing is minimized, it too will be marked in the Desktop Tree and on the Documents tab in the Folder Details dialogue box with the **Incomplete RCT** icon. Once the modifications are complete, the icon will be replaced with the standard RCT icon.

A new or existing RCT can be minimized as many times as required. However, please remember that any document that hasn't been checked into the File Cabinet since modifications have been made is not a saved document.

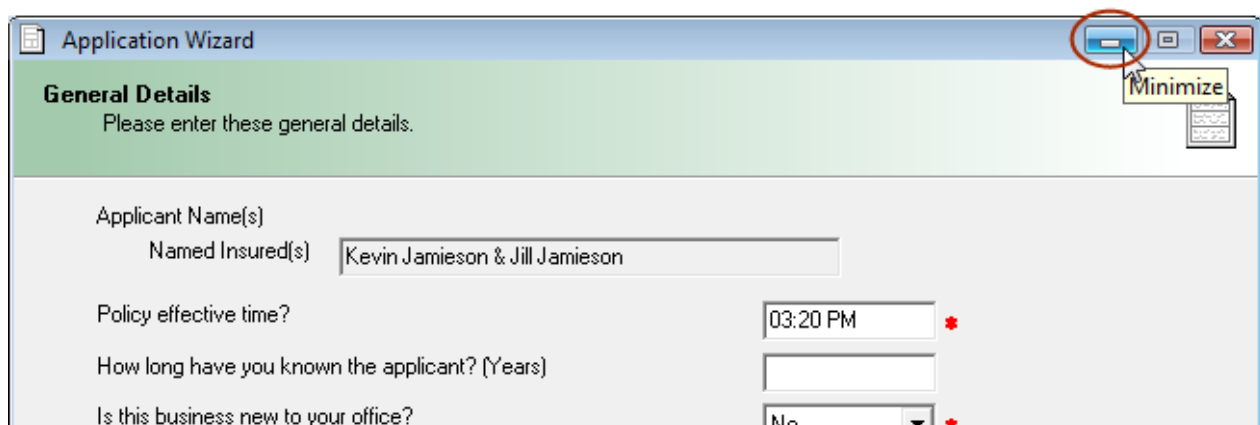
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2. Minimizing an Unfinished Application

TBW users have requested the ability to pause while creating an Application to attend to another task, without losing any information already entered in the Application document or having to complete the entire document first. We are pleased to announce a new feature that allows the TBW user to minimize the Application window while the Application document is being created or modified. With this program enhancement, the TBW user can set aside the incomplete Application to assist a client, complete a task in another client folder, etc., and then return to and complete the unfinished Application at a later time.

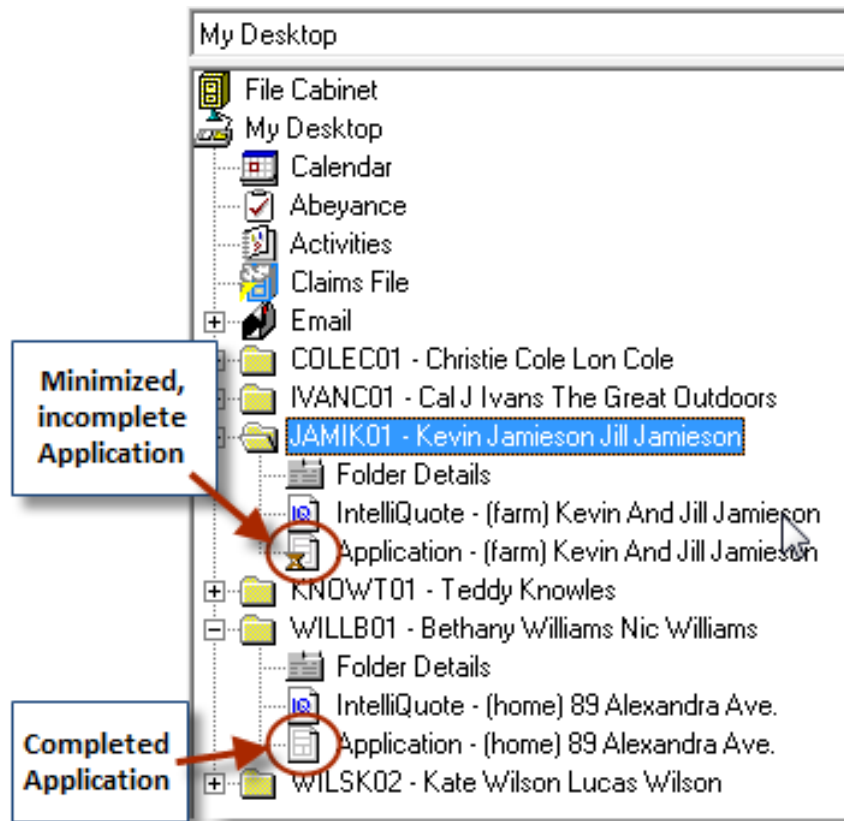
The **Minimize button** is available in the top right corner of each window of the **Application Wizard** (see Figure 2.1). Simply click the Minimize button to set the incomplete document aside, and all information already entered in the current window, as well as any data entered in any other Wizard window to this point, will be saved and stored.

(Figure 2.1)



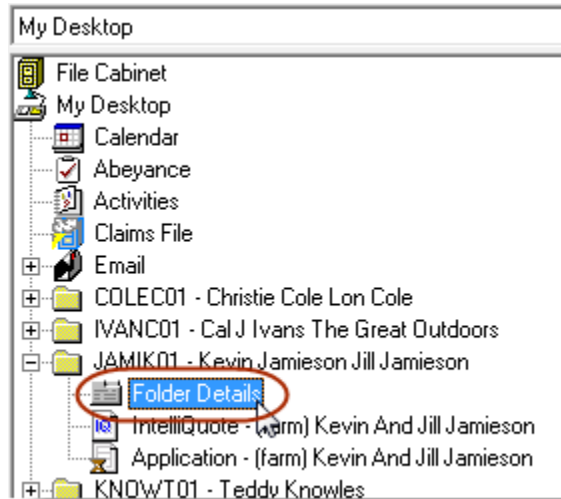
The minimized, unfinished Application will appear in the **Desktop Tree**, marked by an icon that clearly distinguishes the incomplete document from Applications that have been completed (see Figure 2.2).

(Figure 2.2)

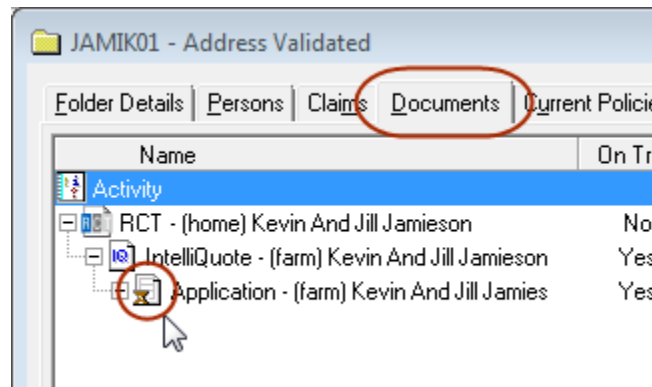


The incomplete Application is also listed and identified as an unfinished document in the client's Folder Details. Double-click the client's **Folder Details** in the **Desktop Tree** (see Figure 2.3), and then click the **Documents tab** in the **Folder Details** dialogue box. Any incomplete Application listed in Folder Details will be clearly marked with an icon identifying it as an unfinished document (see Figure 2.4).

(Figure 2.3)



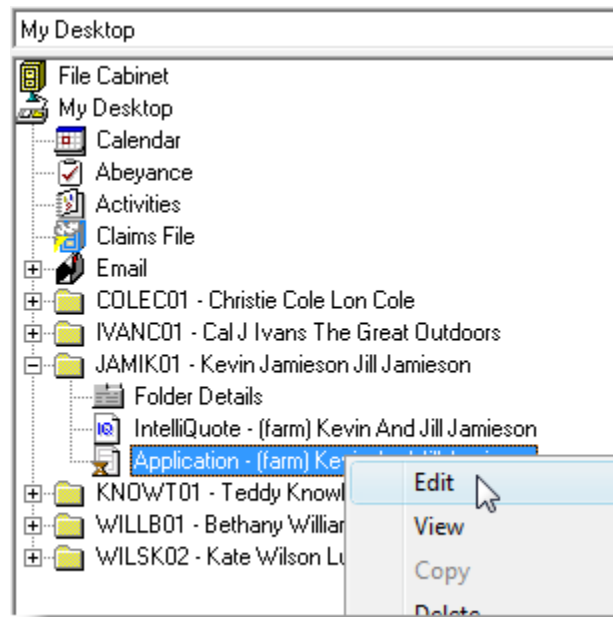
(Figure 2.4)



After minimizing an Application, the TBW user can assist a client, work with another client document or folder, exit TBW to complete another task, etc. However, when an unfinished Application has been minimized, the user **cannot** mark the document for upload.

To continue to work on an incomplete Application, either double-click the document in the **Desktop Tree**, or right-click the Application in the Desktop Tree and then click **Edit** in the right-click menu (see Figure 2.5). The document will open to the window in which the user was last working, and all details already entered in the Application will be visible and available to the user.

(Figure 2.5)



The Minimize feature can also be used while editing an existing Application. If you are modifying an Application document, but must pause during the process to complete another task, use the Minimize feature to set the document aside for the time being. When an existing Application opened for editing is minimized, it too will be marked in the Desktop Tree and on the Documents tab in the Folder Details window with the **Incomplete Application** icon. Once modifications have been completed, the icon will be replaced with the standard Application icon.

While a new or existing Application can be minimized as many times as needed, please keep in mind that any document that has not been checked into the File Cabinet since modifications have been made is not a saved document.

Please note that this Minimized Application enhancement is unavailable for commercial policies.

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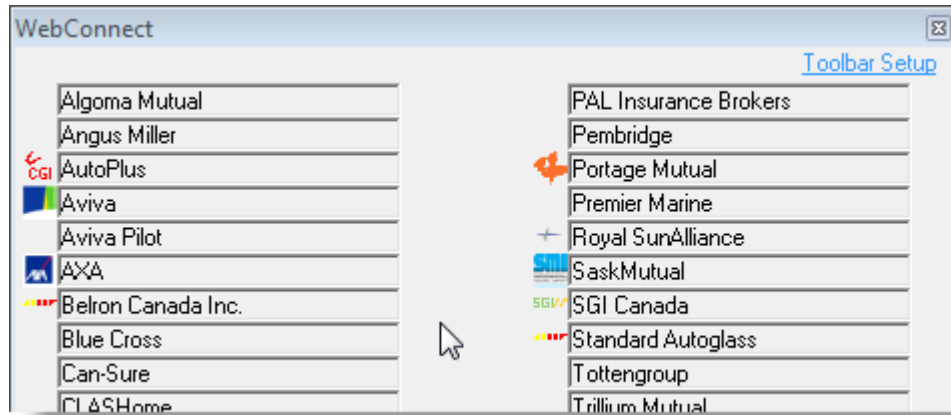
3. Expanded WebConnect Company List

We are pleased to announce that the list of companies accessible through TBW's WebConnect feature has been expanded, in response to requests by TBW clients.

The WebConnect feature in TBW allows the user to quickly and easily access specific company websites directly from the TBW interface. When the TBW user clicks the **WebConnect button** on the TBW

toolbar, the list of companies available through WebConnect opens in the **WebConnect window** (see Figure 3.1).

(Figure 3.1)



This list has been expanded to include the following companies:

- Aviva Pilot
- PAL Insurance Brokers

Please note that the WebConnect window can now expand to two columns to better accommodate the increased number of companies accessible through WebConnect.

Access to TBW's WebConnect feature is controlled through User Rights (**Tools, Administrative, User Manager**).

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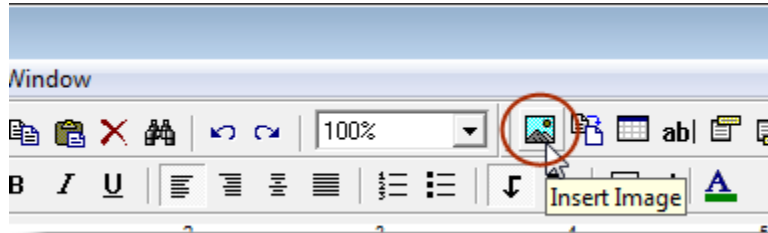
4. Enhanced "Insert Image" Feature in the TBW Word Processing Module

TBW's word processing module enables the user to create and build a broad collection of personalized business documents quickly and easily by combining use of word processing, graphics, and desktop publishing. In response to requests by TBW users to further streamline the insertion of images into word processing documents, we are pleased to announce an improvement to the Insert Image feature in the TBW word processing module.

Previously, when inserting an image into a word processing document, the user immediately selected the image layout and then carried on to find and select the target graphic. With the new enhancement, the image is selected first, and layout and other options are applied afterwards.

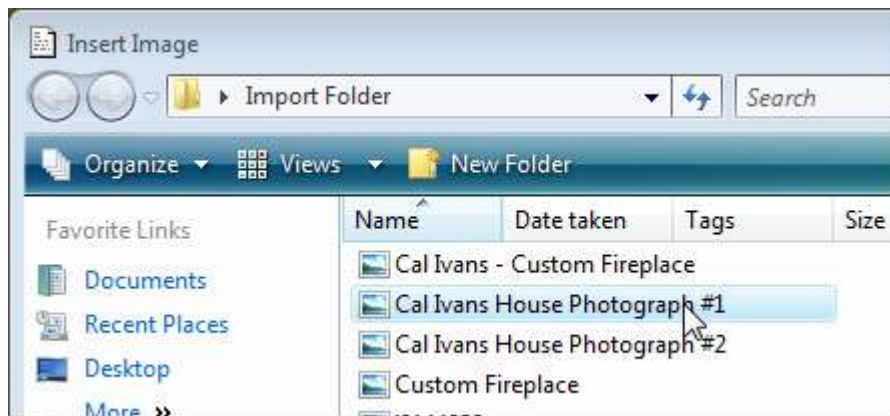
To select an image, either click the **Insert Image button** on the document toolbar (see Figure 4.1) or click **Insert, Image**.

(Figure 4.1)



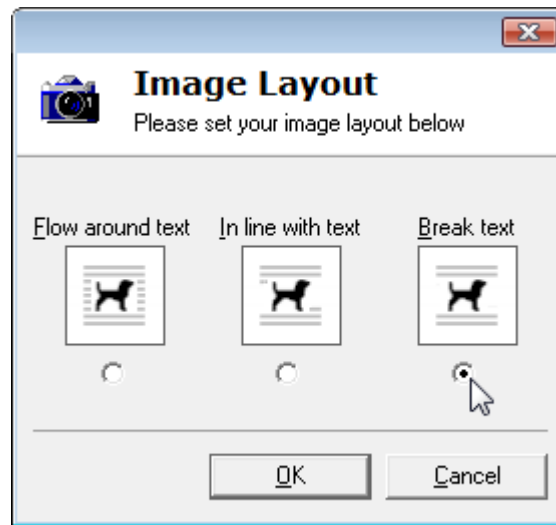
In the **Insert Image dialogue box**, find and double-click the image to be added to the document (see Figure 4.2).

(Figure 4.2)



The **Image Layout window** will appear. Choose the layout for the image, and then click **OK** (see Figure 4.3).

(Figure 4.3)



The image will be placed in the document. To further format the inserted image (i.e. change the image size, text-flow borders, etc.), simply double-click the image to open the **Image Attributes window**.

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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.

