18 February 2010

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

Custom Software SOLUTIONS INC.

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1. View Abeyance Document and Client Folder

Clients have requested the ability to access documents associated with Abeyances more quickly and easily. In response to this request, we are pleased to announce an application enhancement that allows the user to check out and view the client folder and document associated with an Abeyance while working in the Abeyance window or on the Abeyance Report tab in the Activities window.

To open the Abeyance window, double-click **Abeyance** in the **Desktop Tree** (see Figure 1.1).

(Figure 1.1)
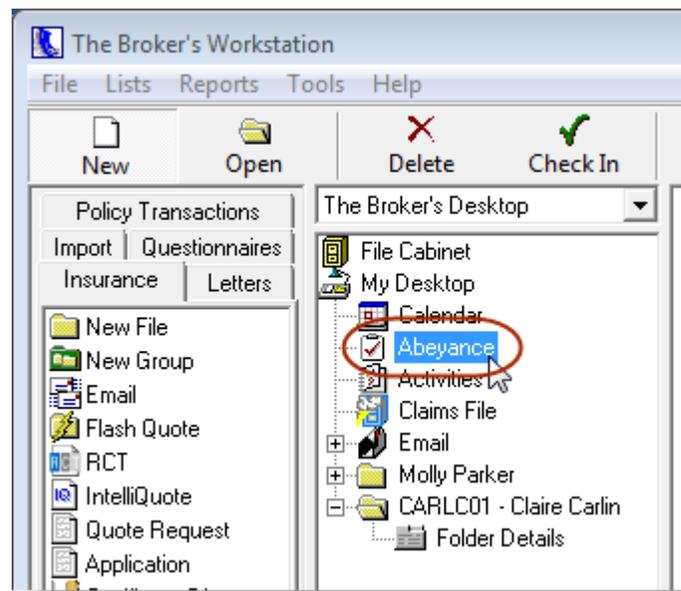
The Abeyance window will open. After applying filters as required to find the target Abeyance, right-click the Abeyance, and then click **View Document** in the right-click menu (see Figure 1.2).

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(Figure 1.2)
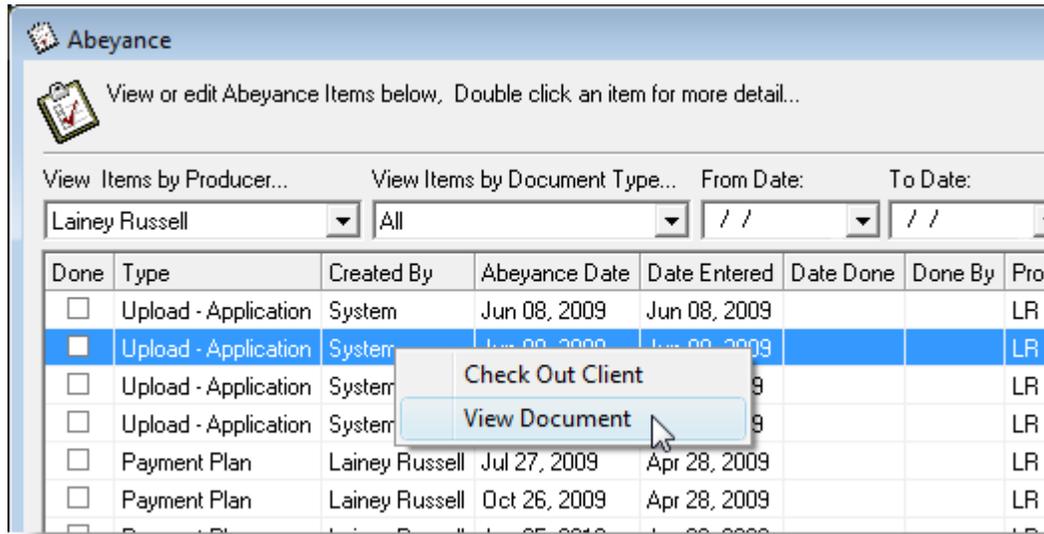
If there is a document associated with the Abeyance, the Abeyance window will automatically close, and the client folder and document will be checked out and available on the Desktop Tree. The document will also open in the Document Window (see Figure 1.3).

- If the client folder is already in use by another user, you will have the option to open a read-only copy of the folder. As well, if no document is associated with the Abeyance, an **Attention** prompt will appear.

(Figure 1.3)
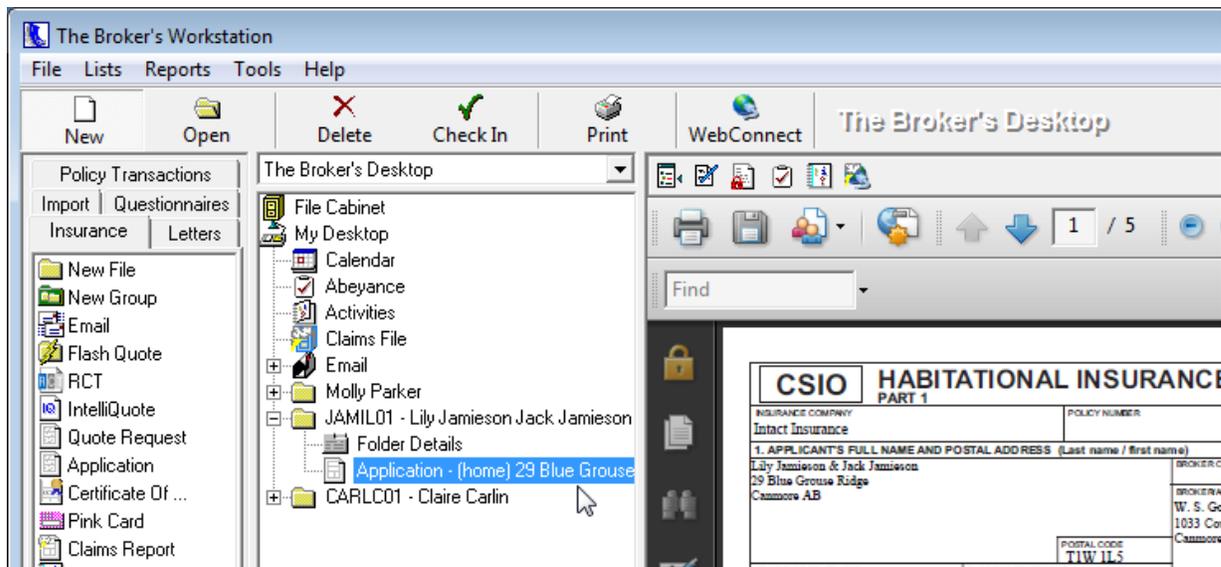
This enhancement is also accessible through the **Abeyance Report** tab in the **Activities** window. Double-click **Activities** in the Desktop Tree to open the Activities window (see Figure 1.1). In the Activities window, click the **Abeyance Report** tab, enter any necessary filters to assist in locating the Abeyance, and click the **View** button.

In the list of Abeyances that appears, find and right-click the target Abeyance. Click **View Document** in the right-click menu (see Figure 1.4), and the relevant client folder and document will be checked out to the TBW Desktop.

(Figure 1.4)
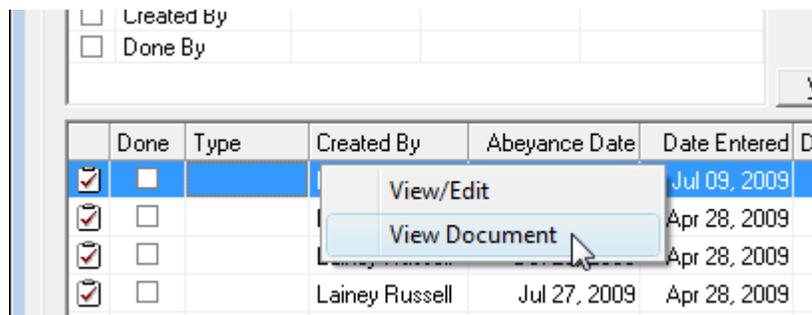
Once again, the Activities window will close automatically, and the associated document will be available for viewing in the Document Window.

*Please note that this feature is available only on the SQL database platform.*

2. Word Processor Template Categories

We are pleased to announce that the Templates feature has been enhanced to allow the TBW user to create template categories and quickly and easily group templates within these categories.

Before any template categories have been created, all templates available to the user will be grouped under the "**No Category**" group in the **Letters Tray** (see Figure 2.1). To close the group, either double-click **No Category** or click the **minus (-) sign** beside the category name.

(Figure 2.1)
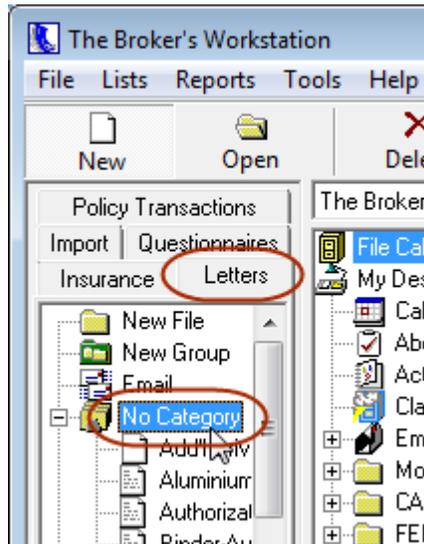
To create a new Template Category, click **Tools**, **Word Processor**, **Template Categories** (see Figure 2.2).

(Figure 2.2)
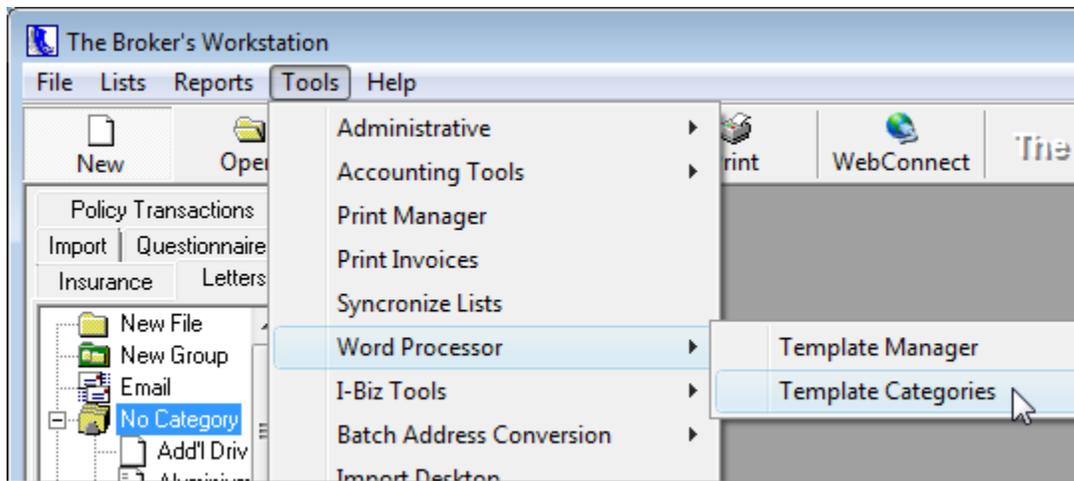
The Template Categories window will open, displaying **All Server Templates** in the left pane and any existing **Template Categories** in the right pane. Click the **Add** button to create a new category (see Figure 2.3).

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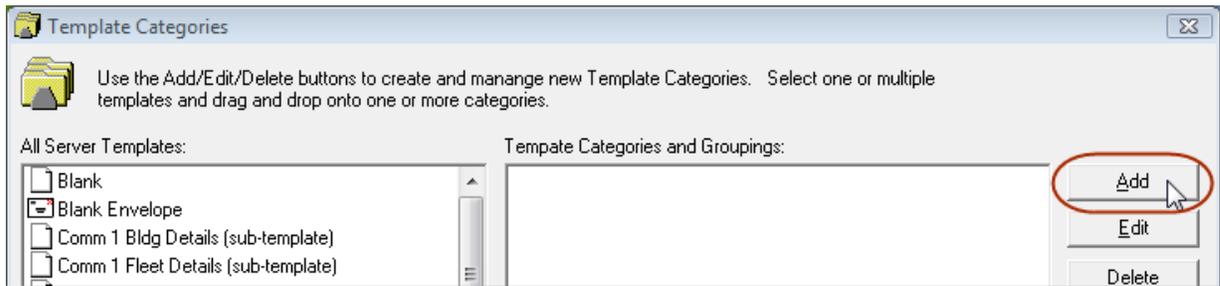
(Figure 2.3)

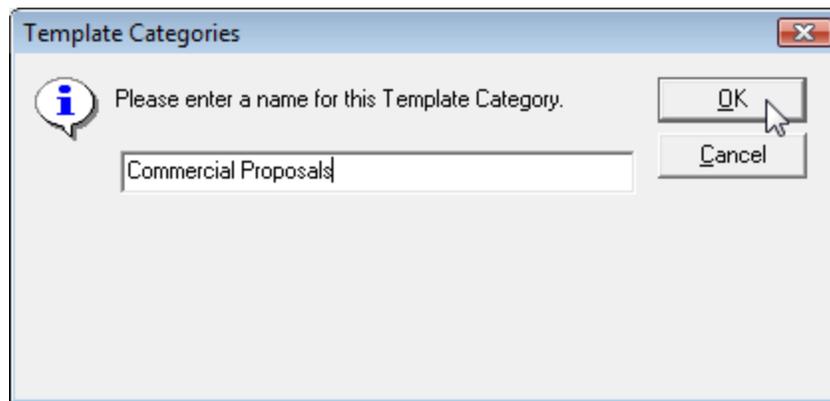Enter a descriptive **Name** for the Template Category, and then click **OK** (see Figure 2.4).
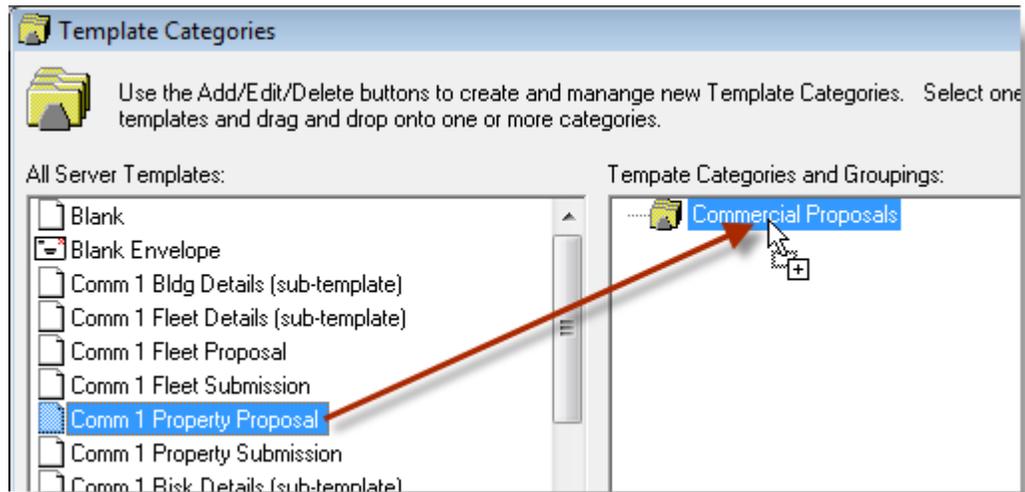
(Figure 2.4)

The new category will appear in the **Template Categories and Groupings** pane. To add one or more templates to this new category, simply drag and drop the template(s) from the **All Server Templates** list onto the category (see Figure 2.5).

- Use **Shift+click** to move multiple sequential templates to a category, or use **Ctrl+click** to move multiple non-sequential templates to a category.

- Note that each server template, whether it has been moved to a Template Category or not, will still be listed in the **All Server Templates** list.

(Figure 2.5)

To view templates in a particular category, click the **plus (+) sign** beside the Template Category to expand the menu (see Figure 2.6).

(Figure 2.6)
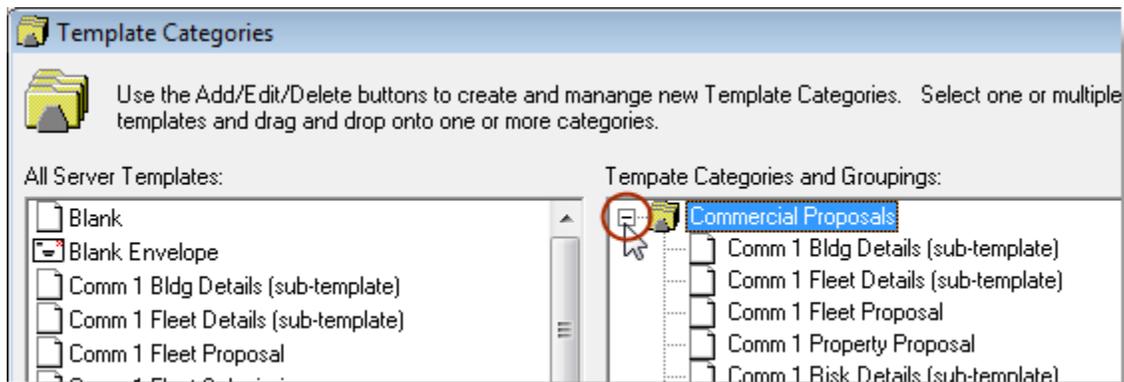
Please note the following when creating Template Categories and organizing templates:

- A template can be included in more than one Template Category.
- Any template not assigned to a Template Category will, by default, be included in the **No Category** group.
- Only **server templates** are listed in the All Server Templates list and can be organized into categories. To move a local template into a template category, first copy that template to the server using the **Copy to Server** button in **Template Manager** (**Tools**, **Word Processor**, **Template Manager**).

■ Note that the **No Category** grouping will hold any local templates that have not been grouped in any particular Template Category.

To delete a template from a particular Template Category, select the template and then click the **Delete** button. *Note that the template itself will not be deleted; rather, it will merely be removed from that particular grouping*. A Template Category can also be deleted using the Delete button.

Once a Template Category has been created, it will be available in the **Letters Tray** on the **TBW Desktop**. To view templates organized in that category, either double-click the category name or click the **plus (+) sign** beside the category name (see Figure 2.7).

(Figure 2.7)
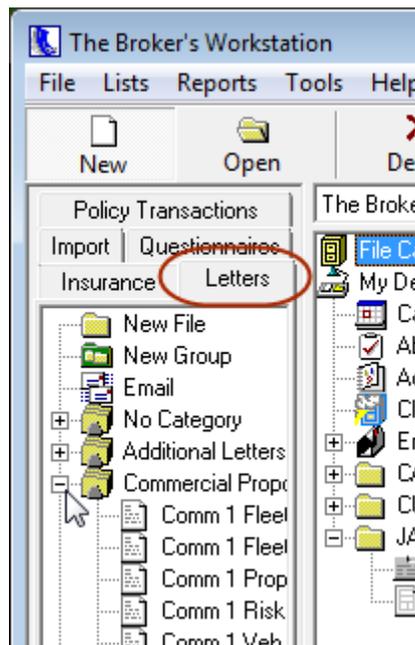
The Template Categories feature is managed by **User Rights** (**Tools**, **Administrative**, **User Manager**, **Rights**).
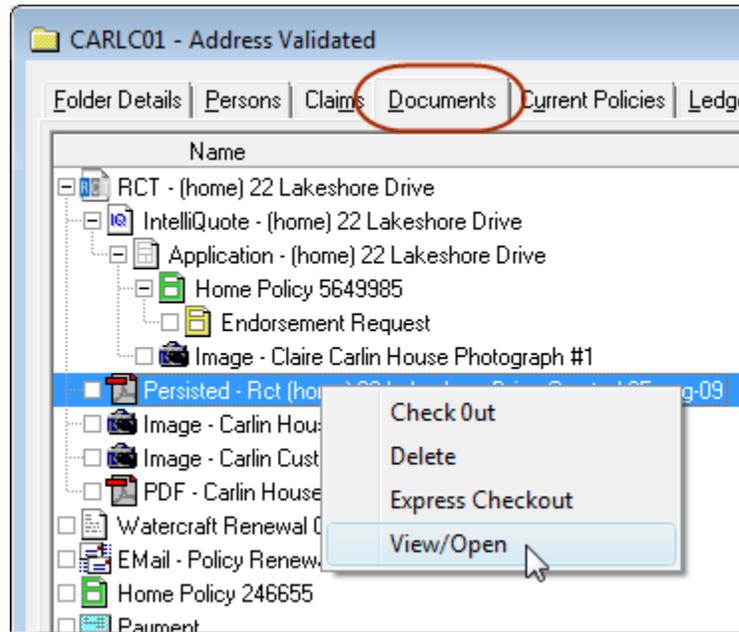
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3. Open a Persisted Document in Its Own Window

Clients have requested the ability to open a persisted document directly from the Documents tab in the client folder into its own external window. In response to this request from our clients, we are pleased to announce that a persisted document can now be opened in its own window, rather than the TBW Document Window, through an option in the right-click menu. This feature allows the user to have access to a document in a separate window while continuing to use the TBW window.

To open a persisted document in its own window from the **Documents tab** in the client folder, right-click the target document in the Documents list. In the right-click menu that opens, select the **View/Open** option (see Figure 3.1).

(Figure 3.1)

The document will open in its own window, rather than in the TBW Document Window. The client folder window will remain open, as well. Also, if required, the document can be opened and viewed in the TBW Document Window at the same time.

Please note that this option is available for persisted documents, as well as PDF documents, images, and attachments brought in from other programs (such as Microsoft Word and Microsoft Excel).

4. Switch Thumbnail Viewer in Folder Details On or Off

Clients have requested the ability to choose whether or not to use the Thumbnail Viewer function on the Documents tab in Folder Details. In response to this request, we are pleased to announce an enhancement to this feature that enables the individual TBW user to choose whether or not to view thumbnail images in a client's Folder Details.
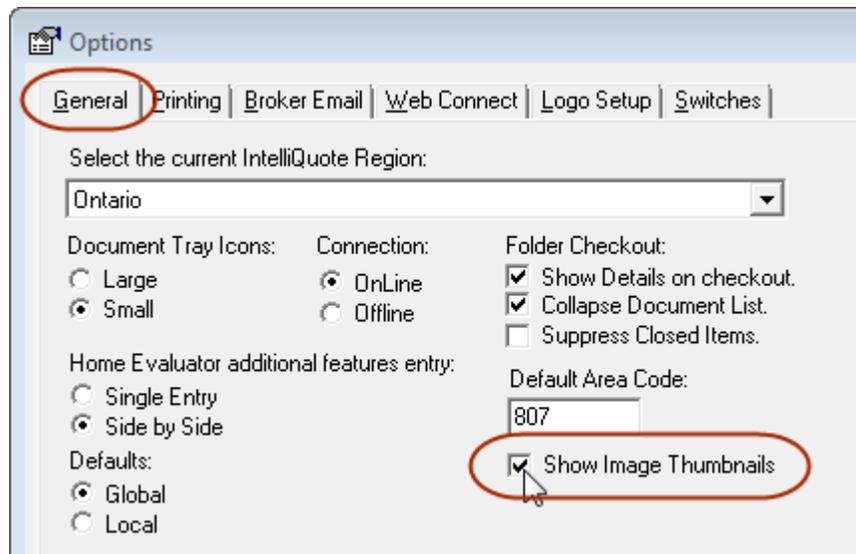
To enable or disable the Thumbnail Viewer feature, click **Tools**, **Options** (see Figure 4.1).

(Figure 4.1)
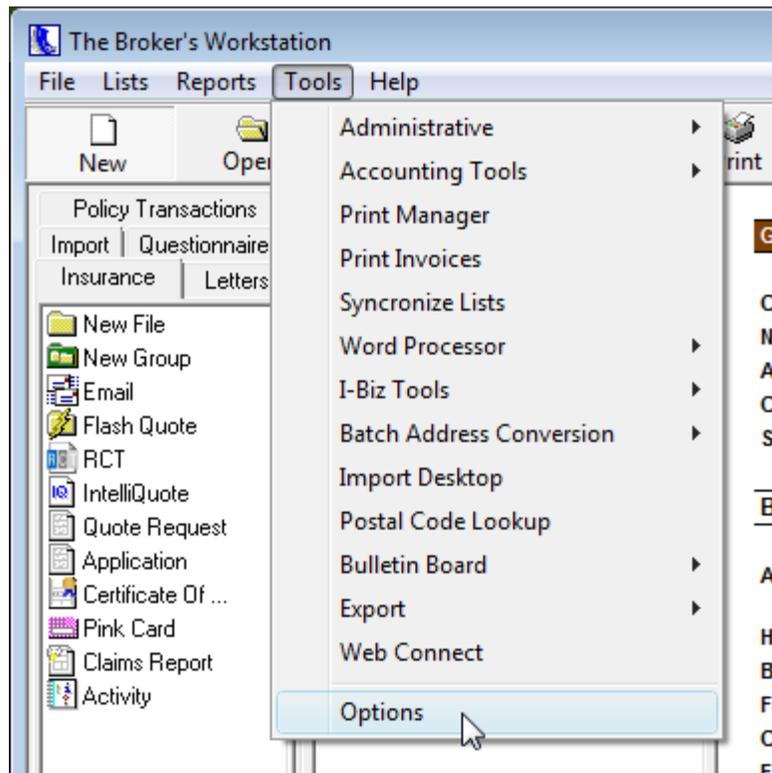
On the **General tab** in the **Options** window, select **Show Image Thumbnails** to enable the feature (see Figure 4.2), or deselect to disable the feature. Click **OK**.

(Figure 4.2)

If this feature in enabled, images of PDFs and persisted documents and images can be viewed in reduced size in a client's Folder Details on the **Documents tab.** Simply click the document or image, and the thumbnail image will appear in the lower right-hand corner of the window (see Figure 4.3).

(Figure 4.3)
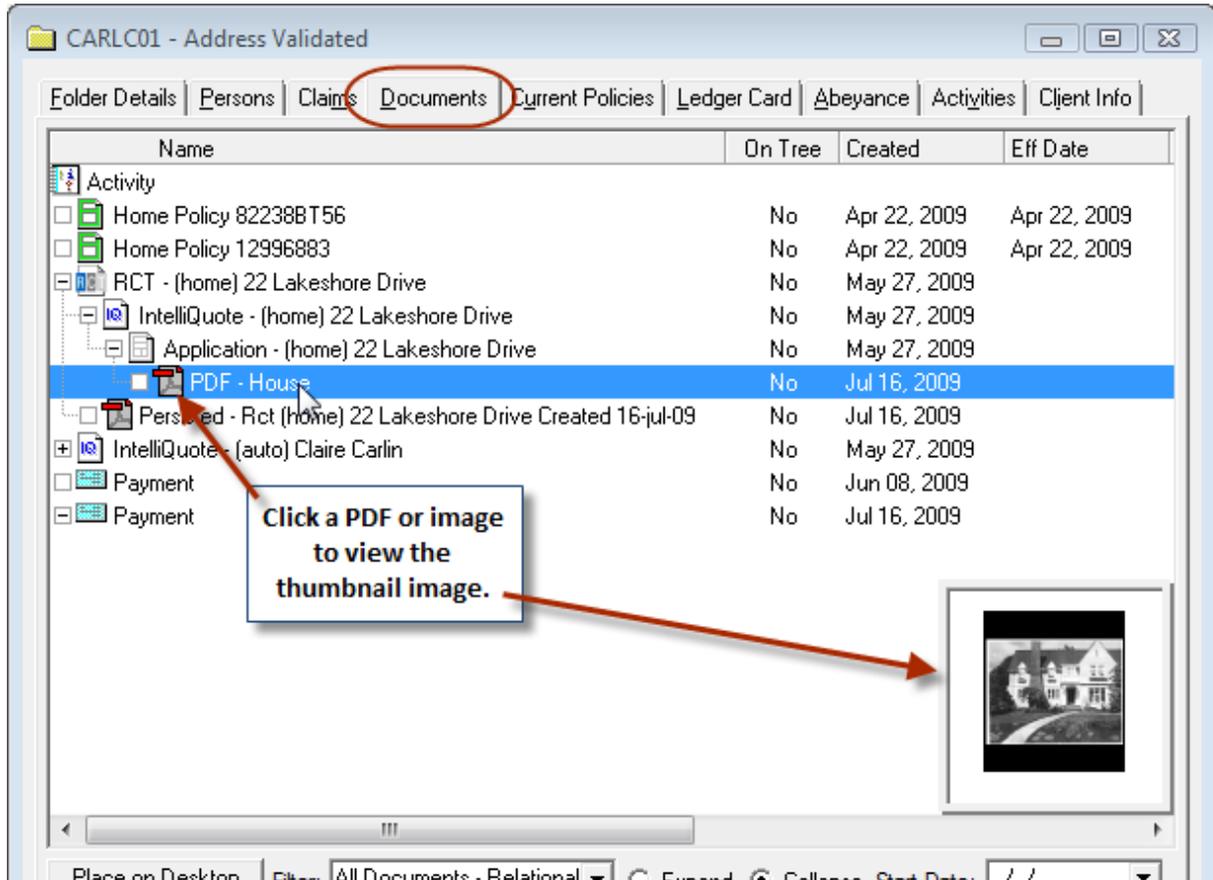
Click the thumbnail itself, or click another, non-PDF or non-image document to hide the thumbnail view in the window.
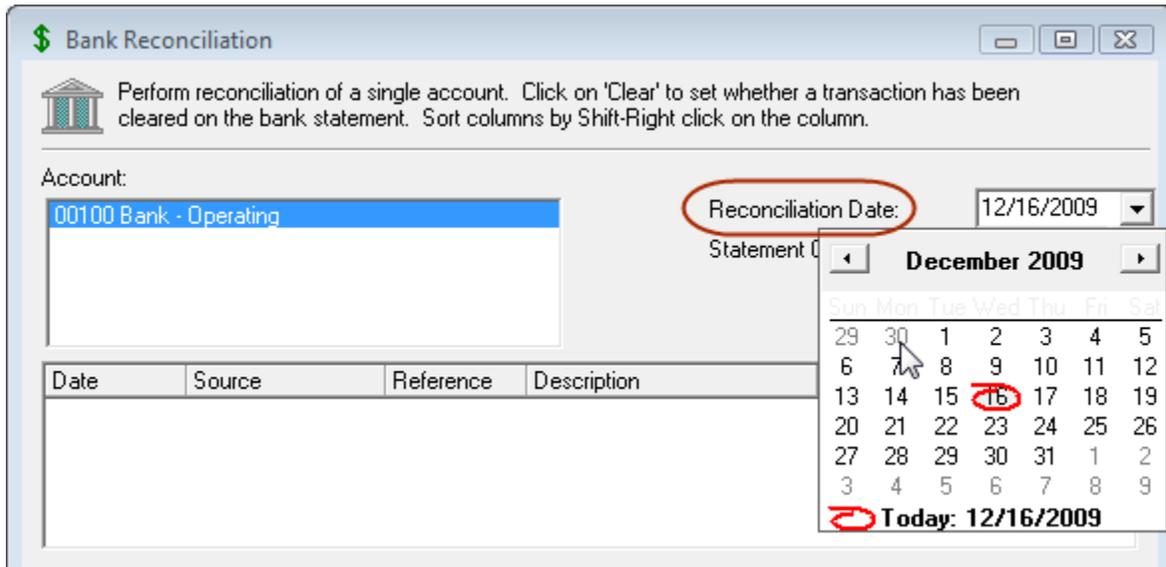
5. Enhancements to the Bank Reconciliation Feature

We are pleased to announce that TBW's Bank Reconciliation feature has been enhanced to allow the user to select the reconciliation date. This allows the generation of a textbook bank reconciliation and report. The process of doing a bank reconciliation is unchanged other than the need to input this date.

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In the **Bank Reconciliation** window, select the bank account to reconcile, and then select or enter the **Reconciliation Date** (see Figure 5.1). The Reconciliation Date is generally the date on the respective bank statement for the account being reconciled.

(Figure 5.1)

Enter the **Bank Statement Closing Balance**, click the upper **Details** button (see Figure 5.2), and wait while the system computes the bank balance as of the bank reconciliation date and loads the available transactions into the grid. Note that this grid's contents will be limited to those items dated equal to or earlier than the Reconciliation Date. Another benefit of the upgrade is that all previously cleared items are now suppressed, leaving fewer items to work through.

(Figure 5.2)
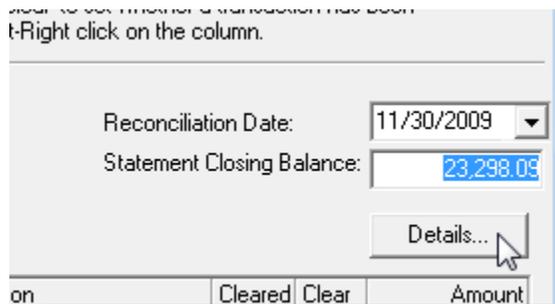
To print the bank reconciliation, click the **Print** button. Note that the selected Reconciliation Date will appear at the top of the resulting document (see Figure 5.3). The printout can serve as a working paper for use in resolving any issues or for a permanent record that the account was reconciled, as the case may be.

(Figure 5.3)
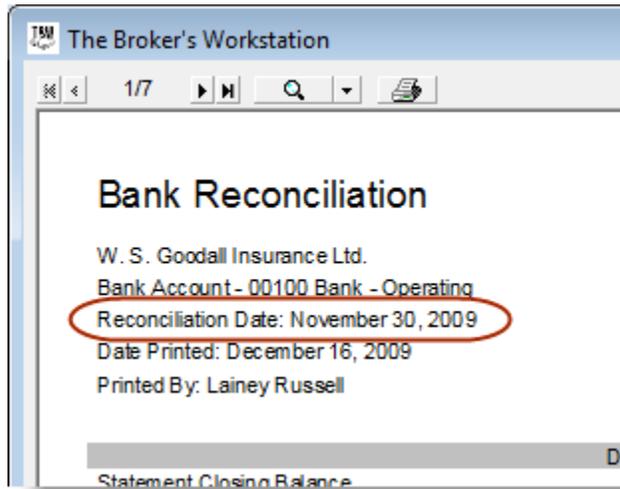
The data can also be exported to Microsoft Excel for further analysis, formatting, etc., by clicking the

Export to Excel button in the **Bank Reconciliation** window.

*Please note that this feature is available only on the SQL database platform.*

6. Pending Payment Printing Options

We are pleased to announce that the TBW user can now select a particular print layout when printing Pending Payments.

To print a Pending Payment, click the **Print** button in the **Pending Payment** window. In the **Printing Option** window, choose a print selection, and then click **OK** (see Figure 6.1).

(Figure 6.1)
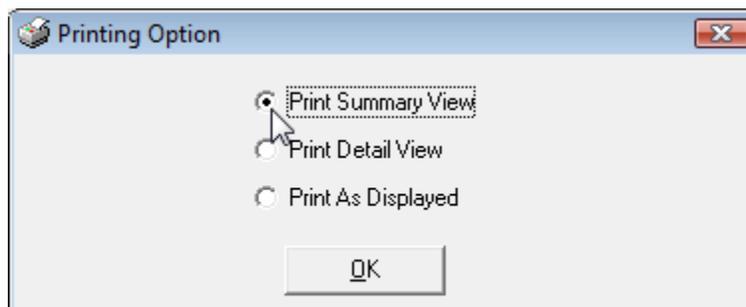
The Pending Payment presents a large amount of information about the included transactions. In the case of a complex policy containing multiple coverages, fees, or perhaps a subscription, the Pending Payment presents a summary line and then a number of detail lines as required. On the other hand, a simple policy with a single coverage and no flow-through fee will have a summary line and only one detail line, which for the most part duplicates the summary.

Depending on the purpose and/or recipient of the report and the nature of the included transactions, the detail may be unnecessary or represent a duplication. As such, TBW offers the ability to print the report in a number of ways to best suit its purpose:

- The **Summary View** prints only the summary line for each included transaction. This could be appropriate when all included transactions are of a simple construction.

- The **Detail View** prints the summary line, followed by all detail lines for each included transaction. This could be appropriate when all or many of the included transactions are of a complex construction.

- The **Print as Displayed** option is the compromise, where the user can select the transactions to display in detail, and the rest will present in summary only. Select items to present in detail by clicking the **plus (+) sign** in the **Policy Code** column to expand the display.

If **Print Preview** is enabled (through **Tools**, **Options**, **Printing**), first preview and then print the Pending Payment.

*Please note that this enhancement is available only on the SQL database platform.*

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7. Modify an Existing Certificate of Insurance

We are pleased to announce that the TBW user can now edit an existing Certificate of Insurance. Previously, the completed certificate was available in PDF format only and could not be changed; with this enhancement, however, the document can be modified and then resaved in PDF format.

To create a Certificate of Insurance, drag and drop the **Certificate of Insurance** icon from the **Insurance Tray** onto the **Quote** in the **Desktop Tree** (see Figure 7.1).
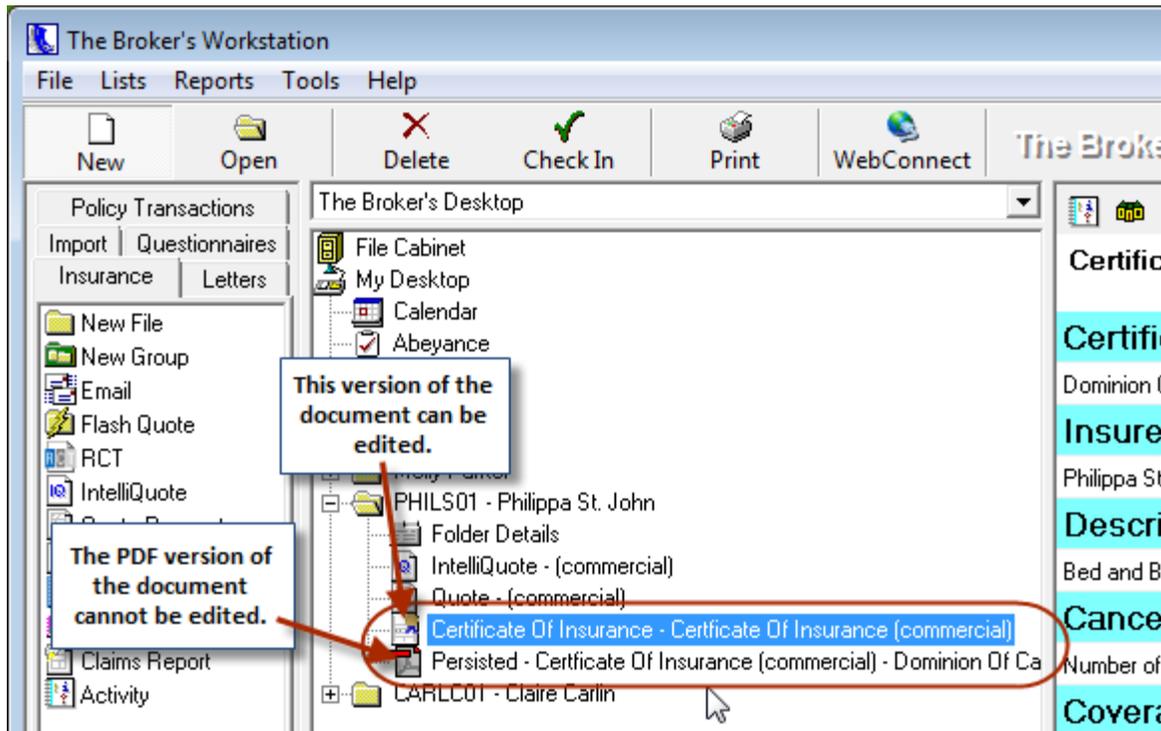
(Figure 7.1)
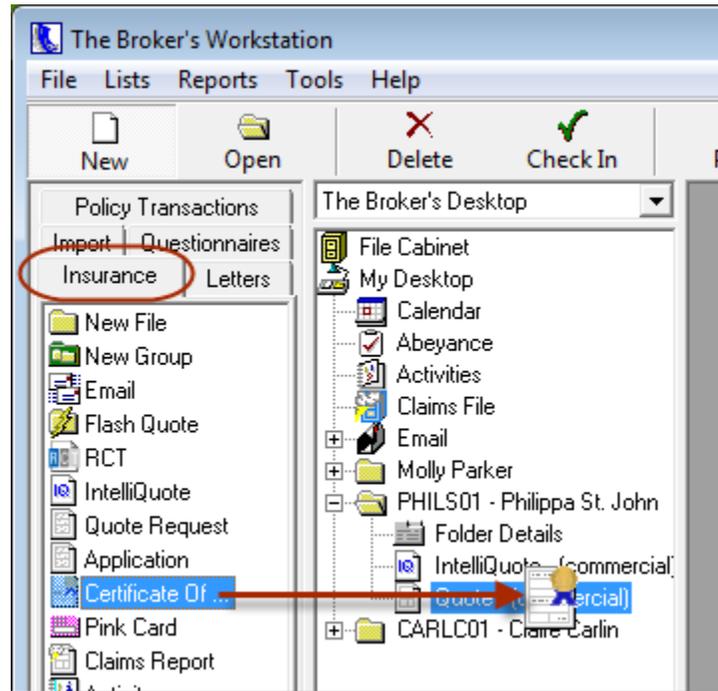
Give the certificate a descriptive name, and then work through the **Certificate Details Wizard**, entering details as requested.

The finished document will appear in two formats in the **Desktop Tree** – as an *editable document* and as a *PDF* (see Figure 7.2). The editable version of the certificate will open in the **Document Window**.

(Figure 7.2)

To make specific modifications to the Certificate, be sure that the editable version of the document is showing in the Document Window. Click a toolbar button at the top of the document to open the corresponding tab in the Certificate Details Wizard (see Figure 7.3).
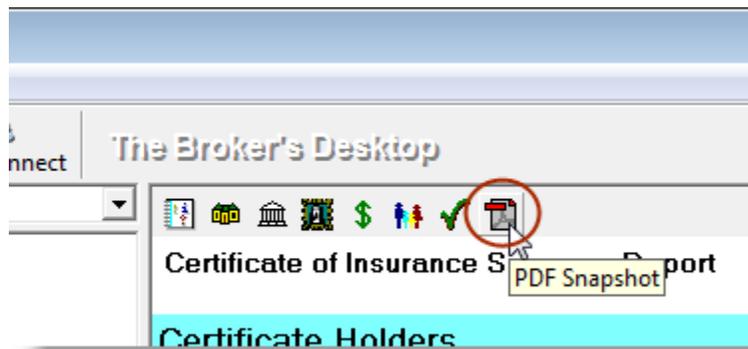
(Figure 7.3)
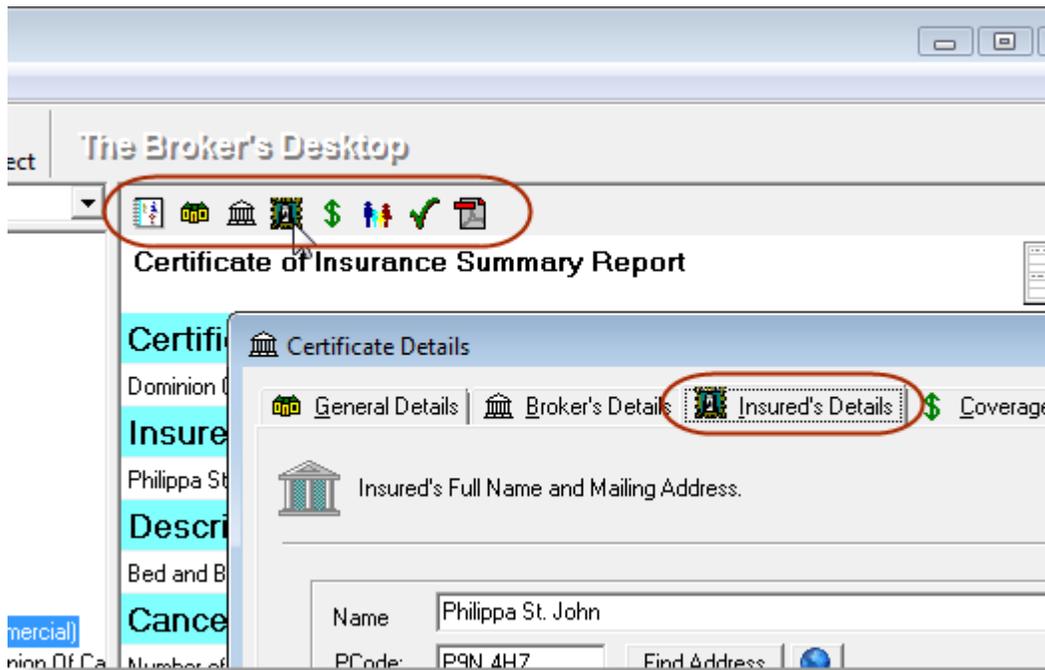
Make changes to the certificate as required using the Wizard, and then click **OK**.

To create a persisted copy of the revised document, click the **PDF Snapshot** button on the toolbar (see Figure 7.4).

- *Note:* *Consider renaming the previous PDF before persisting the revised version to distinguish between persisted copies of the certificate.*
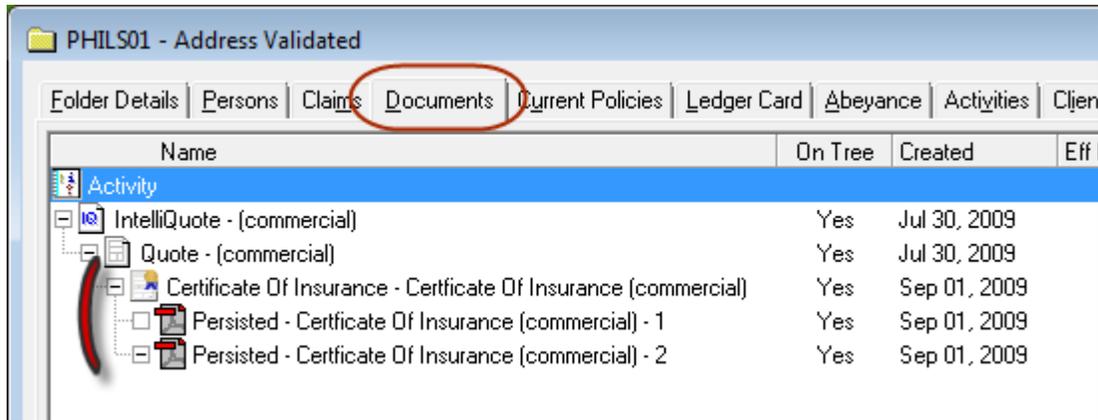
(Figure 7.4)

Make any necessary changes or additions in the **Certificate Details** window, and then click **Finish**. The new PDF version of the Certificate will appear in the Desktop Tree.

In the client **Folder Details**, any persisted certificate will appear as a child document of the editable version of the document (see Figure 7.5).

(Figure 7.5)

Please note that this feature is available only on the SQL database platform.

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Please share this information with the appropriate 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 Client Services Team at clientservices@cssionline.com (email) or 1-888-291-3588 (toll-free telephone).

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

Yours sincerely,

Custom Software Solutions Inc.