



31 October 2012

**To: The Broker's Workstation Users**

Dear Valued Client:

**Re: The Broker's Workstation – Upgrade to New Policy Entry System**

**Haven't Upgraded to New Policy Entry Yet?**

If you haven't made the move, please make plans to do so now for two important reasons:

1. Custom Software will discontinue support and maintenance of the old product after July 31, 2013, and
2. To start enjoying the many new features and benefits only available in the new system.

The TBW New Policy Entry System was released in 2009. It adds new policy billing capabilities, including subscription policies and policy fees. It also introduced policy and producer commission rules to provide better control over commission matters in your policy transactions.

For the majority of your book, there will be no additional effort required to process your policies. For the other 5%, policy features that you need to bill such as fees and subscriptions are now supported.

Now consider the related new features. Since its release, all new policy accounting features have been developed to New Policy Entry. So you need to upgrade to New Policy Entry to get great new features like automated AR & AP reconciliations, Batch Transacting, Auto Transact, EFT and Payment Plans, Producer Change Management, new reporting options, and many more to come.

If you haven't made the move, please book an appointment now. No additional TBW licensing or support and maintenance fees apply to the upgrade. Contact Client Services at 1-888-291-3588 (toll-free telephone) or [clientservices@casionline.com](mailto:clientservices@casionline.com) (email) to get started today.

Thank you for using The Broker's Workstation.

Yours sincerely,

Custom Software Solutions Inc.



**Microsoft** Partner

Gold Independent Software Vendor (ISV)

**Custom Software**  
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