



25 November 2013

**To: Users of The Broker's Workstation and/or The Underwriter's Workstation**

Dear Valued Client:

**Re: The Broker's Workstation and The Underwriter'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)** and **The Underwriter's Workstation (TUW)**:

***Contents***

---

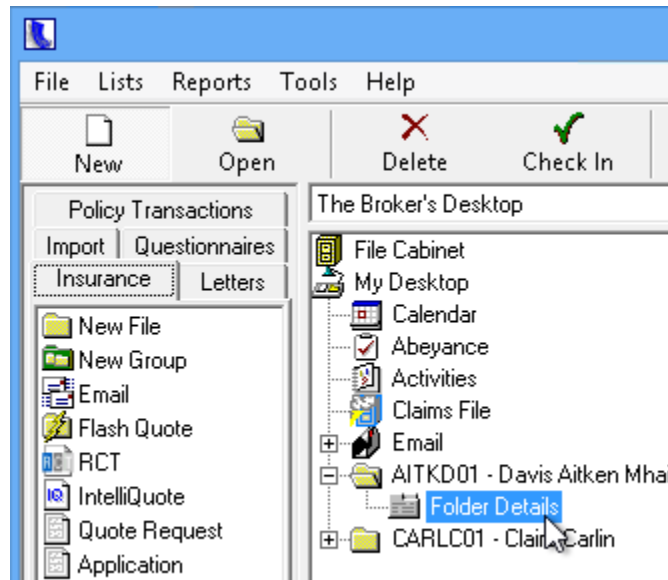
1. [Sort Documents List in Folder Details by Date](#) – The Documents List in Folder Details has been enhanced with the 'Newest First' checkbox, allowing the user to sort and view the list of documents in either chronological or reverse chronological order.
2. [Cancelled and Lapsed Policy Trees clearly identified in the Documents List](#) – To alert TBW/TUW users to inactive policies on the Documents tab in Folder Details, cancelled and lapsed policy trees will now be clearly marked in the list of documents.
3. [Option to View Document already on Desktop](#) – When attempting to check out a document that has already been checked out of the File Cabinet, the TBW/TUW user now has the option to close the Folder Details window automatically and view that document immediately in the Document Window.
4. [Choose Default Settings for Sorting the Abeyance List](#) – Sort the Abeyance list by any column in ascending or descending order, and that sort order will be applied automatically the next time the Abeyance dialog is opened.
5. [Reorder Coverage Items on Optional Coverages in TUW and TBW Commercial IQ](#) – Edit the order of coverage items in the Optional Coverages screen in IntelliQuote by attaching or inserting an item to reorder the placement.

## 1. Sort Documents List in Folder Details by Date

The Documents tab in Folder Details has been enhanced with the 'Newest First' checkbox, allowing the user to sort and view the list of documents in either chronological or reverse chronological order.

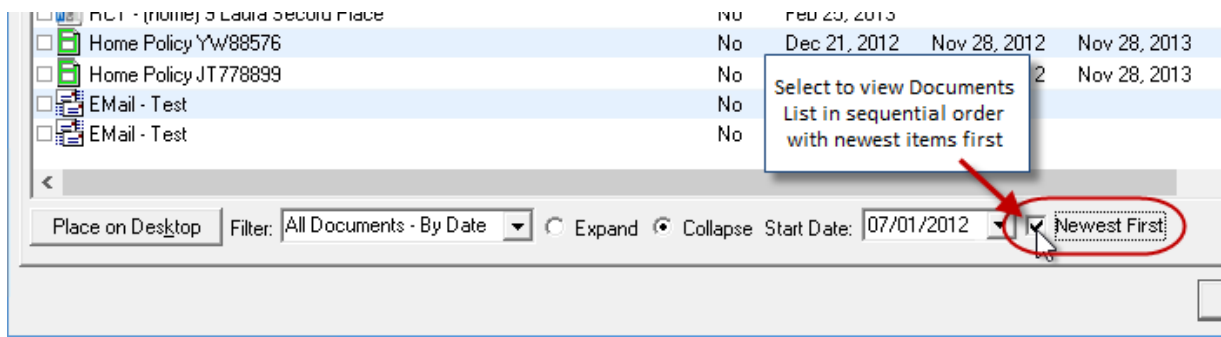
To view this feature, double-click the client's **Folder Details** in the **Desktop Tree** (see Figure 1.1).

(Figure 1.1)



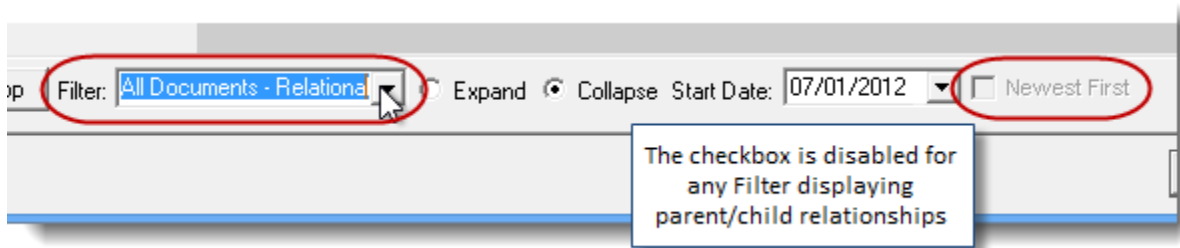
On the **Documents** tab in the **Folder Details** window, click to select the **Newest First** checkbox to sort the list of documents in sequential order, beginning with the most recent item (see Figure 1.2). To resort the list and view oldest items first, simply deselect the checkbox.

(Figure 1.2)



- The selected setting will apply the next time Folder Details is opened, but this setting can be adjusted, as necessary.
- Note that the **Newest First** checkbox is disabled for Filters displaying parent/child relationships, as these cannot be sorted by date. This includes the *All Documents – Relational*, *All Documents – By Term*, *All Documents – Activities/Abeyances*, and *Policy Transactions* filters (see Figure 1.3).

(Figure 1.3)



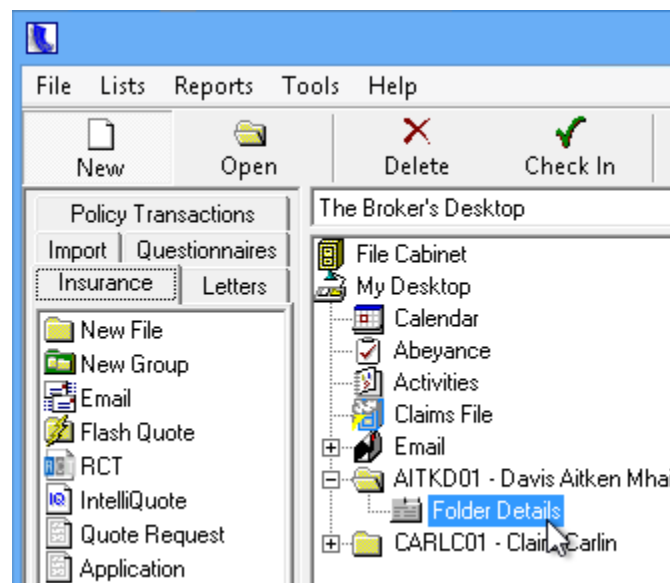
[Return to Contents](#)

## 2. Cancelled and Lapsed Policy Trees clearly identified in the Documents List

On the Documents tab in Folder Details, any inactive policy tree will now be clearly marked to alert TBW/TUW users that this policy tree and documents are associated with a cancelled or lapsed policy.

To view this feature, first open the Client folder by double-clicking **Folder Details** in the **Desktop Tree** (see Figure 2.1).

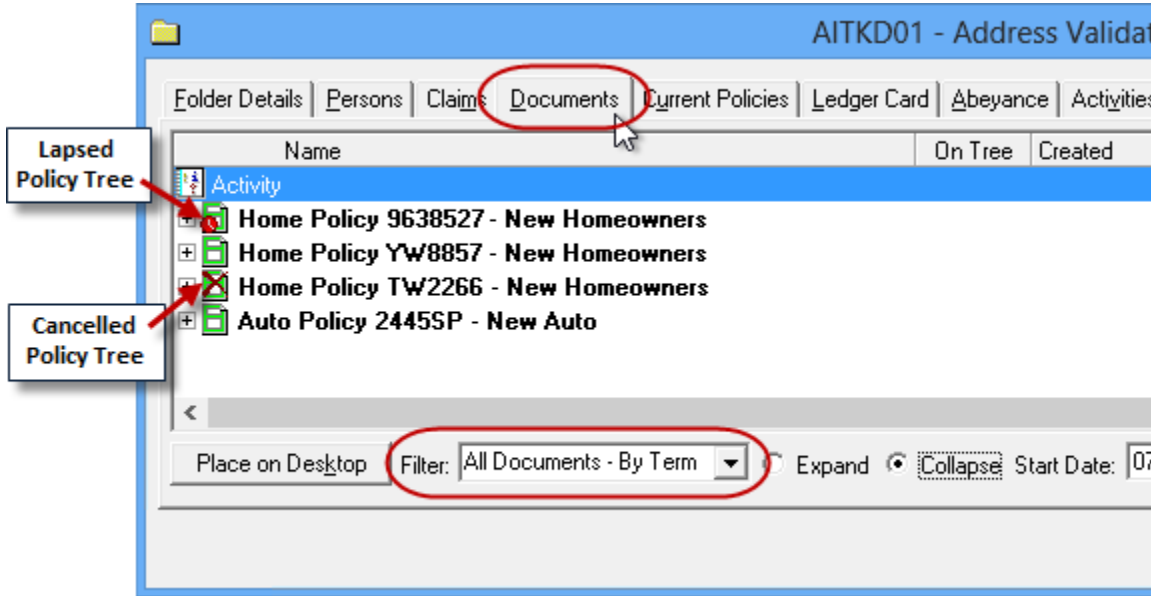
(Figure 2.1)



On the **Documents** tab in Folder Details, the parent document of any cancelled policy tree will be marked with a red 'X' (✗), while the parent document of any lapsed policy tree will be identified with a red clock (🕒) (see Figure 2.2).

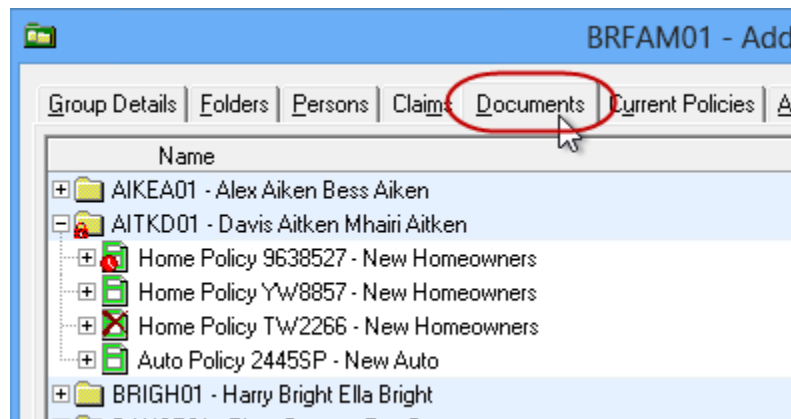
- This feature is applicable in either expanded or collapsed view when the documents list is filtered by the *All Documents – Relational*, *All Documents – By Term*, *All Documents – Grouped*, *All Documents – Activities/Abeyances*, *Images by Policy*, *Policies by Term*, or *Policy Transactions* filter.

(Figure 2.2)



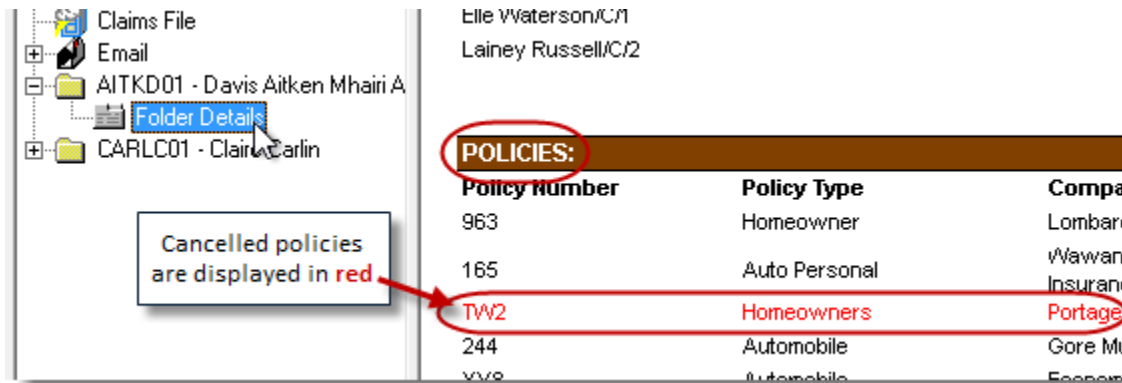
This enhancement is also applicable for Group Folders (see Figure 2.3).

(Figure 2.3)



Please note also that cancelled policies are displayed in red in the client's Folder View. Once the Client folder has been checked out of the File Cabinet, click **Folder Details** in the **Desktop Tree** once to view a summary of the folder. Scroll to view a detailed list of **Policies**, with cancelled policies shown in red (see Figure 2.4).

(Figure 2.4)



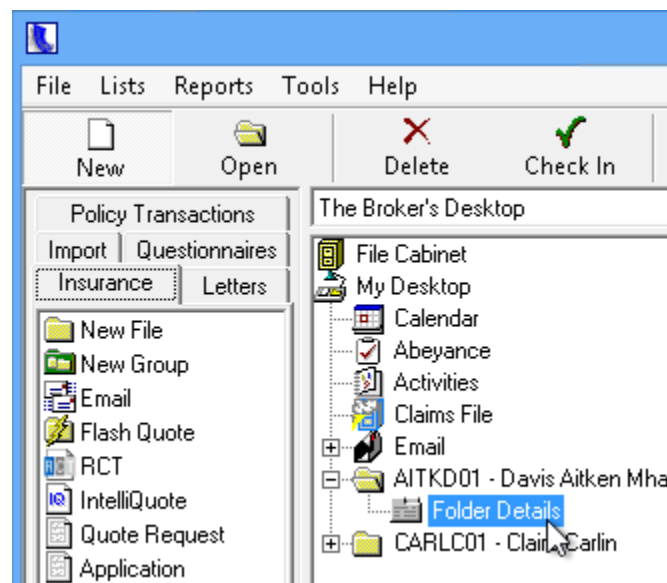
[Return to Contents](#)

### 3. Option to View Document already on Desktop

Previously, when a user attempted to check out a document that was already checked out of the File Cabinet, a prompt would display to inform the user that the document was already on the Desktop. This feature has been enhanced to provide the user with the option to close the Folder Details window automatically and view that document immediately in the Document Window.

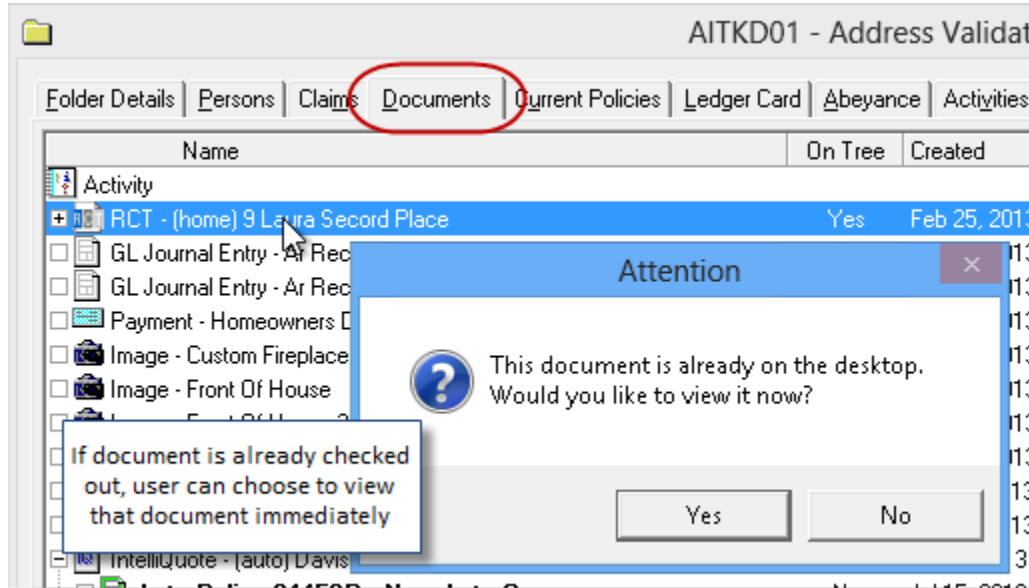
To check out a client document, double-click **Folder Details** in the **Desktop Tree** (see Figure 3.1).

(Figure 3.1)



Then, on the **Documents** tab in the **Folder Details** window, find and double-click the target document. If the document is already checked out of the File Cabinet, an **Attention** window will display, indicating that the document is already on the Desktop and asking if you would like to view that document now (see Figure 3.2).

(Figure 3.2)



In the Attention window, click **No** to remain in Folder Details, or click **Yes** to close the Folder Details window automatically and view the document immediately in the Document Window.

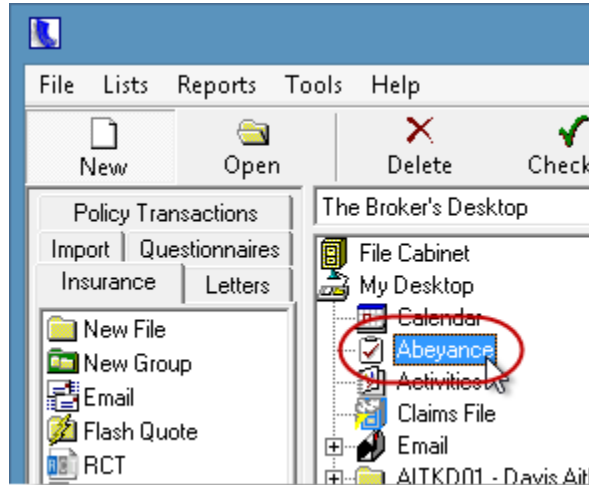
[Return to Contents](#)

#### 4. Choose Default Settings for Sorting the Abeyance List

Until now, the list of Abeyances in the Abeyance window was automatically sorted in descending order by Abeyance Date when the Abeyance window was opened. Now, the user can select the order by which the Abeyance list will automatically be sorted whenever the Abeyance window is opened.

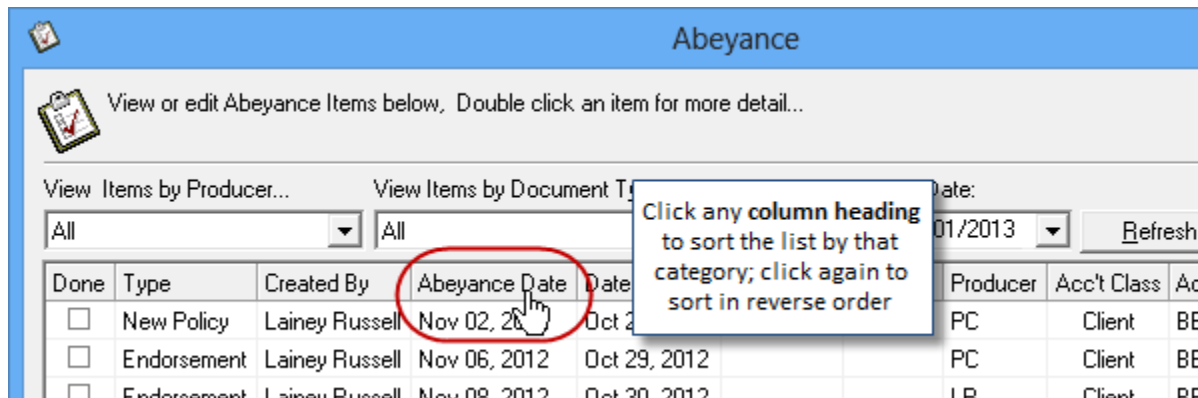
To open the Abeyance dialog, double-click **Abeyance** in the **Desktop Tree** (see Figure 4.1).

(Figure 4.1)



In the **Abeyance** dialog, enter search criteria, and then click the **Refresh** button to display the list of target Abeyances. To sort the list of Abeyances by a column heading, simply click the column heading. Click the heading again to sort the list in reverse order (see Figure 4.2).

(Figure 4.2)



Once the list is sorted in the desired order, click **OK** to close the dialog. The selected sort order will be saved and applied to the list of Abeyances the next time the Abeyance dialog is opened. Note that this sort order will remain as the default setting until the order is changed by the user.

[Return to Contents](#)

## 5. Reorder Coverage Items on Optional Coverages in TUW and TBW Commercial IQ

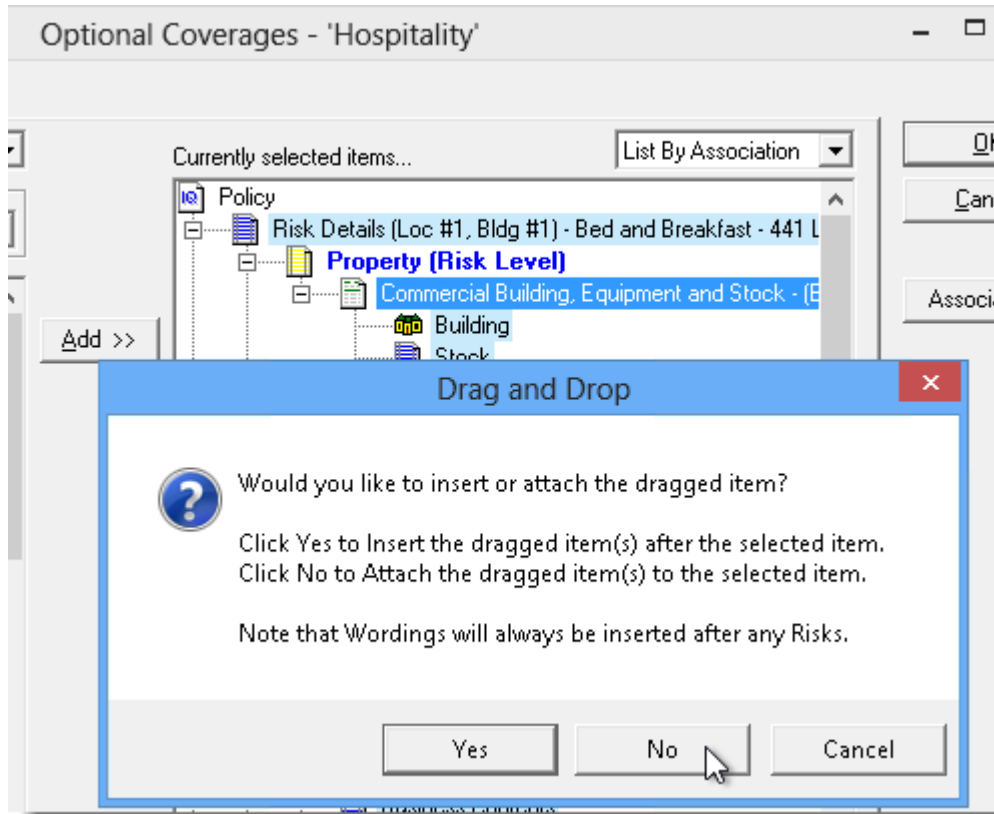
With this enhancement, users can now edit the order of coverage items in the Optional Coverages screen in TUW and TBW Commercial IQ by attaching or inserting an item to reorder the placement.

To change the order of a coverage or insert it as a child item of another coverage in the Optional Coverages dialog, simply drag the coverage item from its current location and drop it on the target

coverage item. A prompt will open, asking if you would like to insert or attach the dragged item (see Figure 5.1).

- Click **Yes** to insert the coverage directly after the item on which it was dropped.
- Click **No** to attach the item to the coverage on which it was dropped as a child coverage item.

(Figure 5.1)



Note that you can move coverage items within a section or between Risk Level and Policy Level sections; however, certain automatic reordering will still occur. A user cannot, for example, move a Property coverage item to the Crime section or move a Liability item to the Property section.

[Return to Contents](#)

Please share this information with the appropriate TBW and TUW users in your office(s). Once you have reviewed this document, if you have any questions regarding these features or need further assistance in their usage, please contact our Client Services Team at [clientservices@cssionline.com](mailto:clientservices@cssionline.com) (email) or 1-888-291-3588 (toll-free telephone).

Thank you for using The Broker's Workstation and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.



**Microsoft** Partner

Gold Independent Software Vendor (ISV)