



17 October 2014

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 enhancement to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

Contents

1. [Lapse Notices for I-Biz Clients in CSIO Downloads](#) – I-Biz users will now receive Lapse Notices in PDF format by CSIO download.

1. Lapse Notices for I-Biz Clients in CSIO Downloads

TBW users who utilize I-Biz will now receive stand-alone Lapse Notices in PDF format with their CSIO downloads.

When a Lapse Notice is received by download, the PDF document will attach in the usual manner to the applicable policy tree in the Client folder, and will be available to the TBW user on the Documents tab in Folder Details.

An Abeyance for the Lapse Notice will automatically be created for the assigned Producer, as well. The Abeyance Subject line will display in the following format: *CSIO Edoc, Expiring Policy, Doc Name: '123456_HPC 123456789.pdf.'* The list of Abeyances can be sorted by column heading to allow the user to view the Abeyance list organized by any of these Subject line elements.

- ***Please ensure that you check your Abeyances following a CSIO download.***

If a PDF Lapse Notice should fail to save to TBW, this incident will be recorded in the Error Log at the end of the download procedure.

[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 this feature or need further assistance in its 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 and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.



Microsoft Partner

Gold Independent Software Vendor (ISV)

To unsubscribe from our email notifications and updates, please contact us at info@cssionline.com or reply to this email.