



8 April 2015

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. [View/Open Documents from the Desktop](#) – Open a PDF, email, image, or attachment on the TBW/TUW Desktop directly into an external window.
2. [Select and Move Multiple Documents in the Client Folder](#) – After selecting multiple documents on the Documents tab in Folder Details, drag and drop the selected documents to attach them to a new parent document.
3. [Filter Claims Report by Loss Date](#) – Filter the Claims Report by date of loss to view claims within a particular date range.

1. View/Open Documents from the Desktop

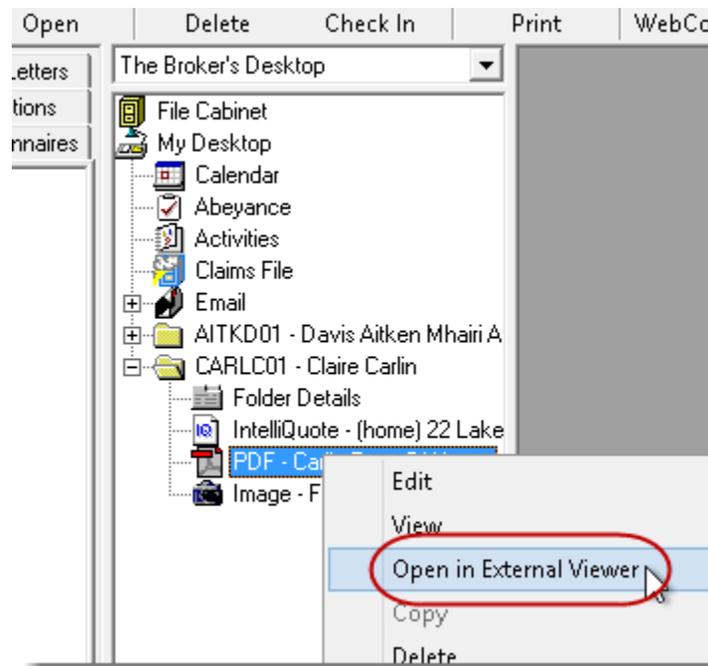
Currently, TBW/TUW users have the ability to open a PDF document, image, or attachment on the Documents tab directly into its own external window. This feature allows the user to continue to use and work in the TBW/TUW window, while having access to another document in a separate window.

In response to requests from our users, this feature has been enhanced to include the ability to open a document that has already been checked out of the File Cabinet in its own external window.

To open a document on the Desktop Tree in an external window, simply right-click the document and, in the right-click menu that displays, select the **Open in External Viewer** option (see Figure 1.1).

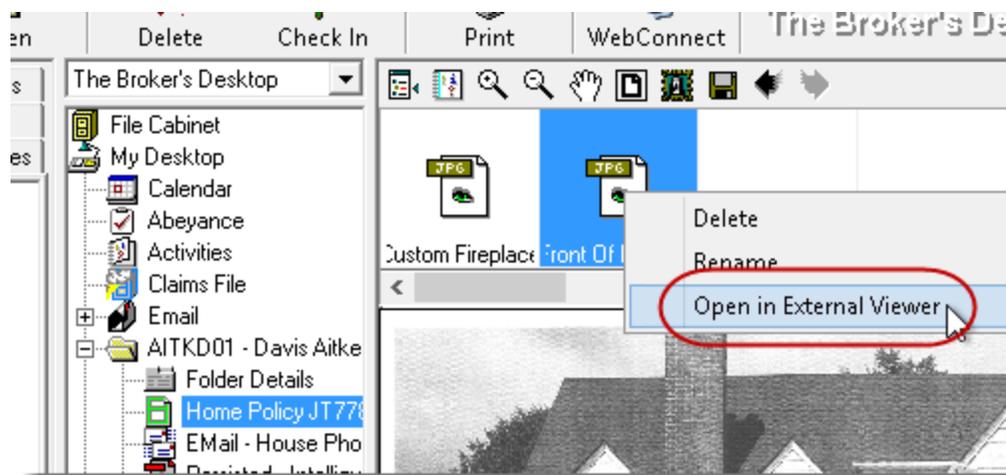
- Note this option is available for PDF documents, email messages, images, and attachments (e.g. Microsoft Word and Microsoft Excel), but *not* for persisted documents, Applications, or documents from the TBW/TUW word processing module.

(Figure 1.1)



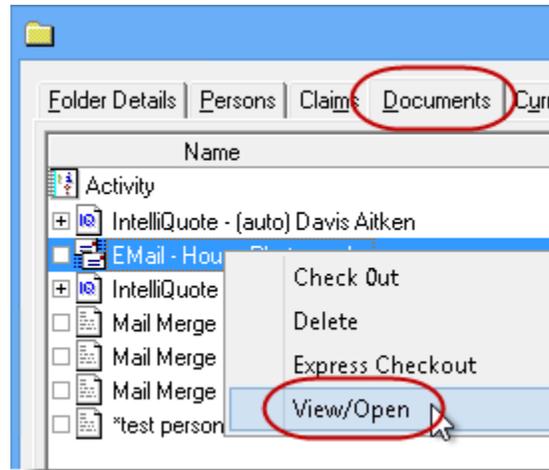
Items on the **Policy Images** tab in a policy document can also be opened directly into an external window. Right-click the target thumbnail and select **Open in External Viewer** to open and view the item in its own window (see Figure 1.2).

(Figure 1.2)



In addition, email messages have been added to the list of items that can be opened directly into an external window from the **Documents** tab in **Folder Details**. Right-click the applicable email, and select **View/Open** in the right-click menu (see Figure 1.3).

(Figure 1.3)



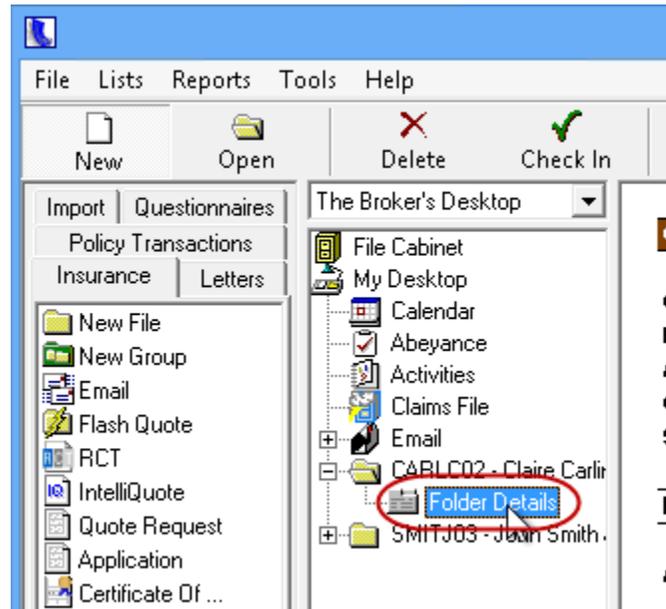
[Return to Contents](#)

2. Select and Move Multiple Documents in the Client Folder

Until now, only one document at a time could be selected and moved to a new location on the Documents tab in Folder Details. Now, with this program enhancement, multiple documents can be selected and then dragged and dropped onto a new parent document.

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

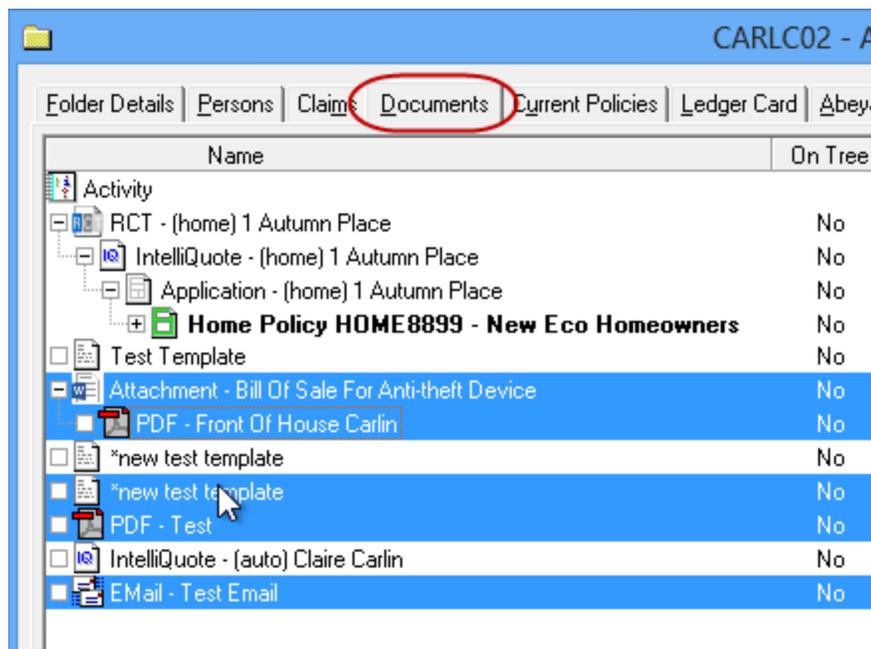
(Figure 2.1)



On the **Documents** tab in Folder Details, select multiple documents to move and attach to another document (see Figure 2.2).

- Use **Ctrl+click** to select multiple non-sequential documents; use **Shift+click** to select multiple sequential documents.

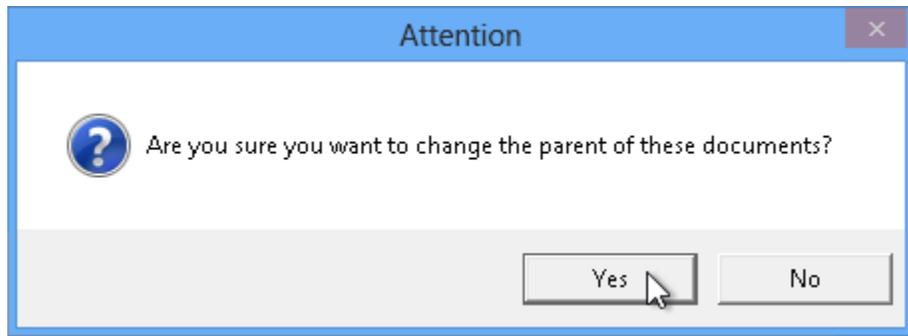
(Figure 2.2)



Once the documents have been selected, drag and drop the group onto the target parent document. In the **Attention** prompt that displays, click **Yes** to attach the selected documents to the

target document (see Figure 2.3). The selected documents will become child documents of the new parent document.

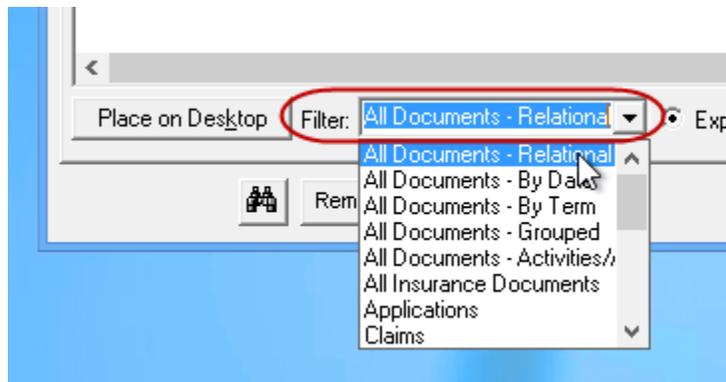
(Figure 2.3)



Please note the following when working with this feature:

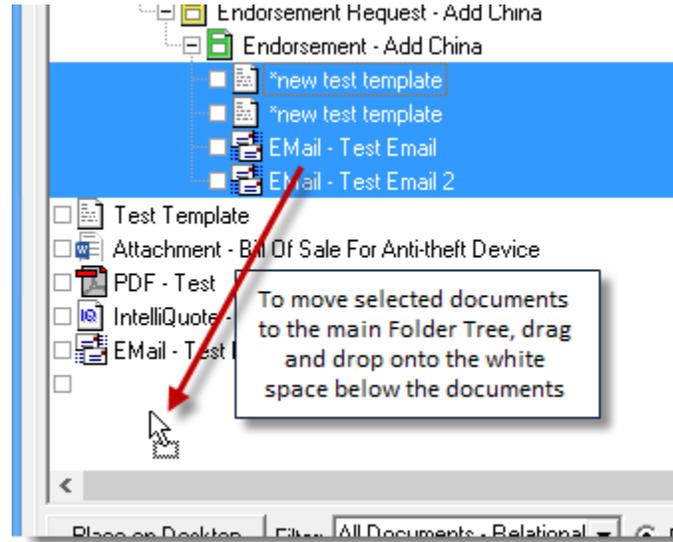
- The ability to select and move multiple documents at one time is available only when the **'All Documents – Relational'** filter is applied on the Documents tab (see Figure 2.4).

(Figure 2.4)



- Note that only certain document types can be moved in this manner, including file attachments, images, word processing documents, PDF files, and email messages.
- This feature is available only when working online, and only for Client folders (not for Group Folders).
- To move multiple documents to the main Folder Tree (not attached to another document), simply drag and drop the selected documents onto the white space below the list of documents (see Figure 2.5).

(Figure 2.5)



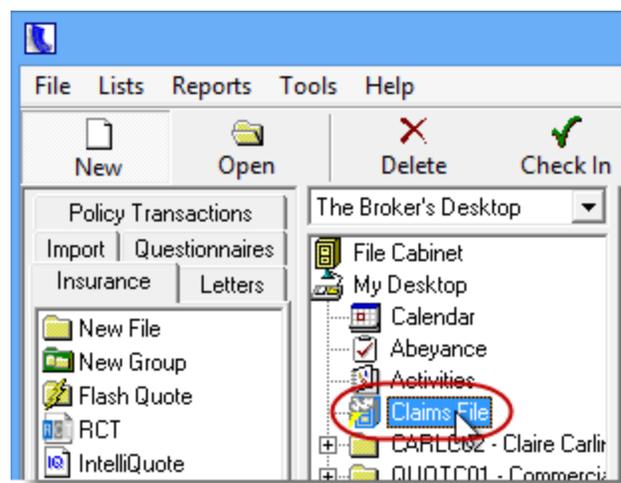
[Return to Contents](#)

3. Filter Claims Report by Loss Date

The Claims Report can now be filtered by the date of loss, allowing the TBW/TUW user to view folder claims within a selected date range. This feature may be especially useful when the user wants to view all claims (whether open or closed) on a particular date (e.g. a catastrophic event, such as flood, hail, or tornado).

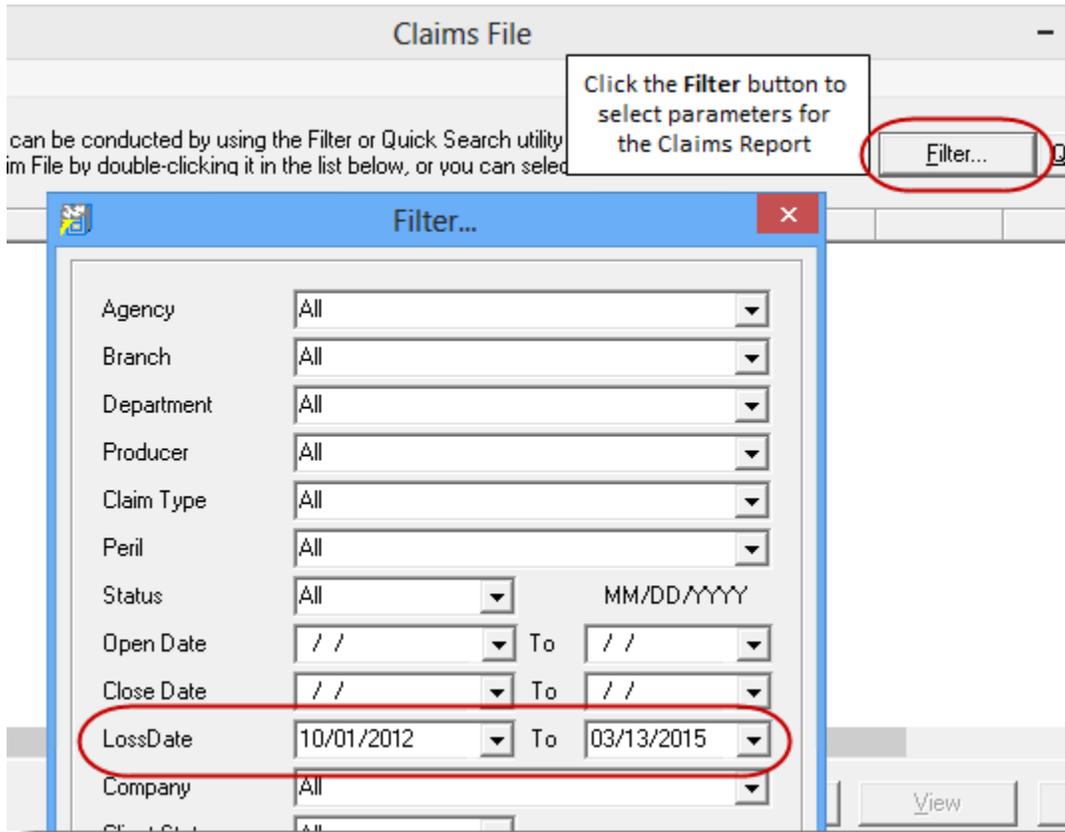
To create a Claims Report, double-click **Claims File** in the Desktop Tree (see Figure 3.1).

(Figure 3.1)



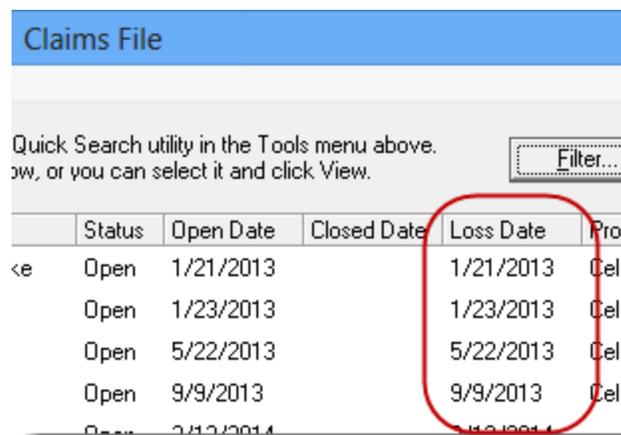
In the Claims File window, click the **Filter** button to open the Filter dialog and select parameters for the Claims Report. Note that **Loss Date** is now available as a report filter (see Figure 3.2).

(Figure 3.2)



Once filters have been selected, click **OK** in the Filter window to view applicable claims in the report results. The applicable date of loss will display in the **Loss Date** column (see Figure 3.3).

(Figure 3.3)



[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 (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.