



23 August 2016

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)**:

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1. [Additional Online Training Sessions](#) – Two new training modules have been added to our list of available online training sessions. In addition, three of the existing sessions have been revamped and streamlined.
2. [Abeyance Attention Alerts](#) – When you are creating an Abeyance for a Client or Broker folder, use the “Attention Alert” option to indicate this is an essential or urgent task that must be completed for this folder.
3. [Color-Coded Past Due Abeyances](#) – Any outstanding Abeyances in the Master Abeyance list, the Abeyance Report, Folder View, and the Folder Abeyance list will be highlighted in red.
4. [Check Out Document from Activities Tab in Folder Details](#) – Right-click an Activity on the Activities tab in Folder Details, and select “Check Out” to open and view the attached document immediately.

5. [Right-Click and Email Dec Page from Desktop Tree](#) – Now, the TBW/TUW user can quickly and conveniently email a Dec Page directly from the Desktop Tree using the right-click menu.
6. ["About" Feature in Void Cheques Current and Closed Periods List](#) – Right-click an item in the Void Cheques Current or Closed Periods lists and select "About" to view additional details about that item.
7. [Notification of Checked Out Folders during Download Processing](#) – A notification will display when a file cannot be processed during download because the associated Client folder is checked out of the File Cabinet.

## 1. Additional Online Training Sessions

Learn how to use The Broker's Workstation with the help of our online training modules and our professional trainers as your guides. All you need to participate is a telephone and a computer with high-speed Internet access.

Two new training modules have just been added to our list of available online training sessions:

- **Get Working with Word Processing in TBW** – If you're responsible for creating correspondence (such as letters, envelopes, and labels) in your brokerage, join us for this 30-minute training session focused on TBW's Word Processing module. Get to know your way around the Word Processor, and learn how to create, modify, and organize reusable letter templates.
- **Get Working with TBW Email** – TBW's fully integrated Email component allows you to access and work with email directly in the TBW/TUW window. If email communication is part of your day, join us for this 30-minute training session to learn how TBW Email can enhance your workflow. We'll look at sending and receiving email messages, sending TBW/TUW documents (and other documents) as attachments, saving email messages to client folders, and more.

In addition, three of the existing sessions have been revamped and streamlined. **Get Started with TBW**, **Get Working with Personal Lines Property Insurance**, and **Get Working with Personal Lines Auto Insurance** are now about one hour in length each. Please note that the Get Started with TBW session is a prerequisite for Get Working with Personal Lines Property Insurance and Get Working with Personal Lines Auto Insurance.

If you would like more information or to register for any of these sessions, please visit our website at <http://cssionline.com/training-support/> or email us at [training@cssionline.com](mailto:training@cssionline.com).

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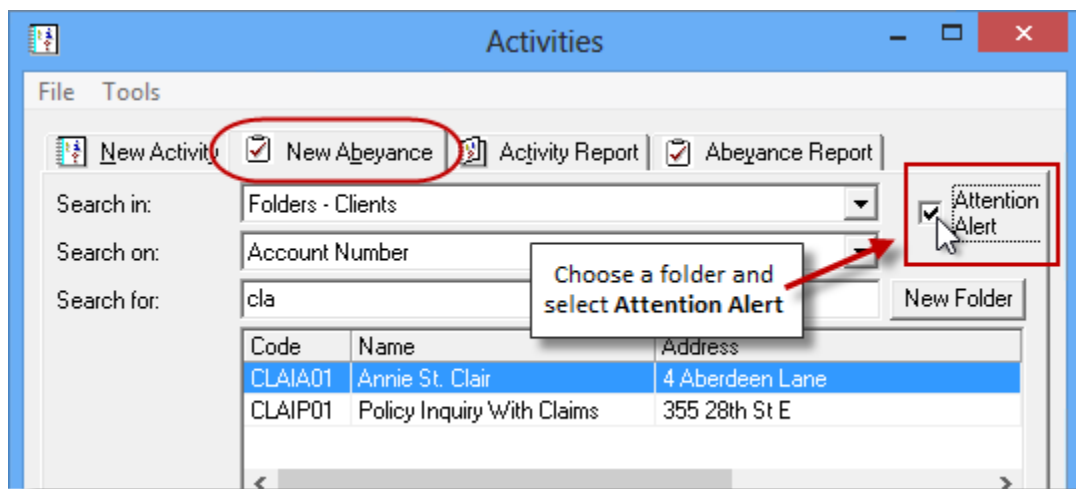
## 2. Abeyance Attention Alerts


When you are creating an Abeyance for a Client or Broker folder, use the **Attention Alert** option to indicate this is an essential or urgent task that must be completed for this folder. For example, the Abeyance Attention Alert feature could be used for payment issues requiring immediate attention or when additional information, a signature, or another essential item is required.

When creating an Abeyance on the New Abeyance tab in the Activities dialog, select the applicable folder in the usual way. Then, if this Abeyance is urgent or requires immediate attention, select the **Attention Alert** checkbox (see Figure 2.1).

- The Attention Alert checkbox will be greyed out / inaccessible until a folder is selected.

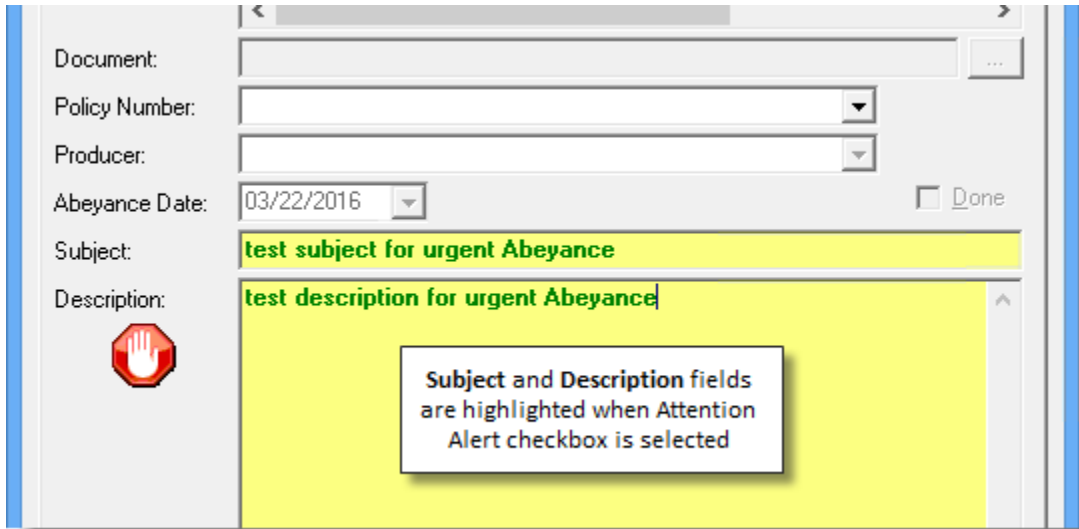
(Figure 2.1)



When the Attention Alert checkbox has been selected, the **Subject** and **Description** fields on the New Abeyance tab will be highlighted and the **Urgent Abeyance**  symbol will display (see Figure 2.2). Enter applicable details in the Subject and Description fields, and click **OK** to create the urgent Abeyance for this folder.

- Note that other details for an urgent Abeyance (e.g. *Document*, *Producer*, and *Abeyance Date*) are inaccessible and cannot be amended. The Abeyance Date will automatically display the System Date.

(Figure 2.2)



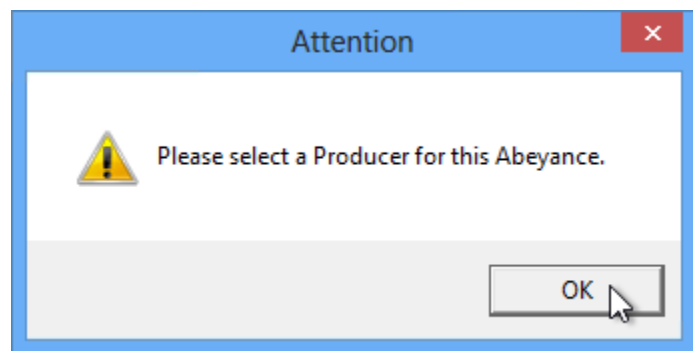
When a Client or Broker folder with an Attention Alert is checked out of the File Cabinet, the urgent Abeyance will open and display immediately, allowing the user to view full details of the Abeyance before proceeding with the folder.

- If the **Show Details on Checkout** option is deselected (through *Tools, Options, General*), the urgent Abeyance will display the first time the user double-clicks Folder Details after checking out the folder, instead.

When an urgent Abeyance displays when a folder is first opened (or whenever you view an urgent Abeyance on the New Abeyance tab in the Activities dialog), choose one of the following options:

- Click **OK** to close the Activities dialog and carry on working in TBW/TUW.
- To mark the Abeyance task as completed, deselect the **Attention Alert** checkbox, select a **Producer** for the Abeyance, and click **OK** (the **Done** checkbox is selected automatically).
  - You will be reminded to select a Producer for the Abeyance if no selection is made before you click OK (see Figure 2.3).

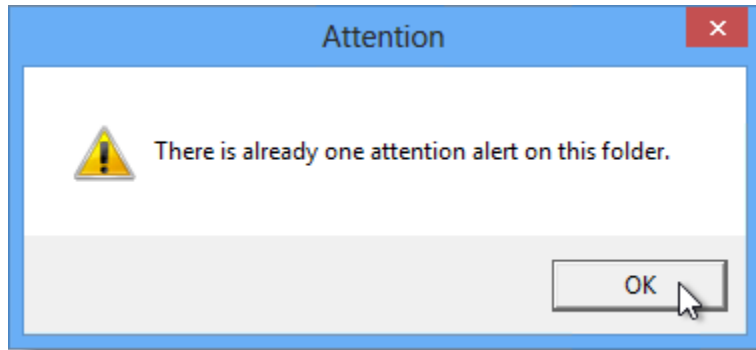
(Figure 2.3)



Please note the following about Abeyance Attention Alerts:

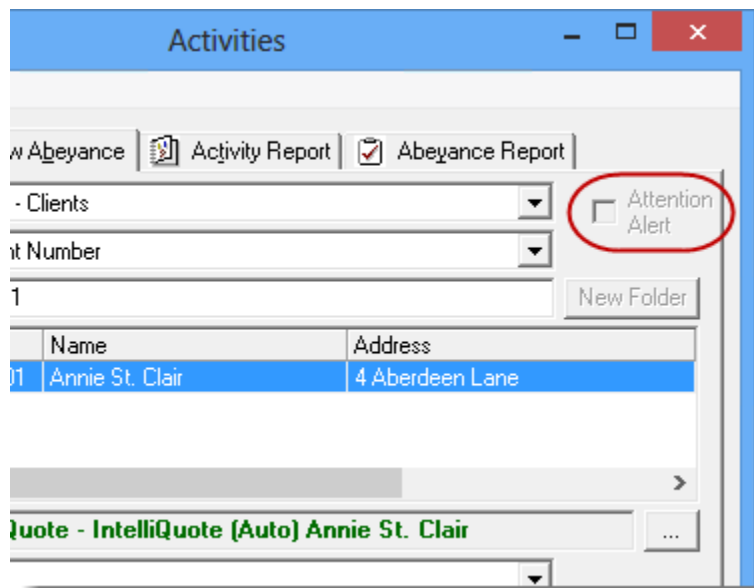
- A folder can only have one Abeyance Attention Alert at a time. If you attempt to add another Attention Alert, a prompt will display to remind you that an alert already exists on this folder (see Figure 2.4).

(Figure 2.4)



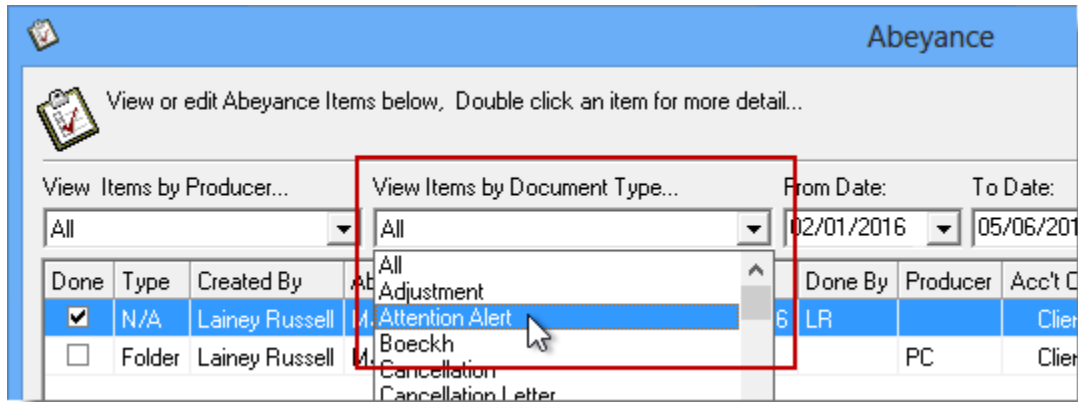
- Attention Alerts are created for Client or Broker folders, rather than for specific documents. The Attention Alert checkbox will be greyed out/inaccessible when you are creating an Abeyance for a target document (see Figure 2.5).

(Figure 2.5)



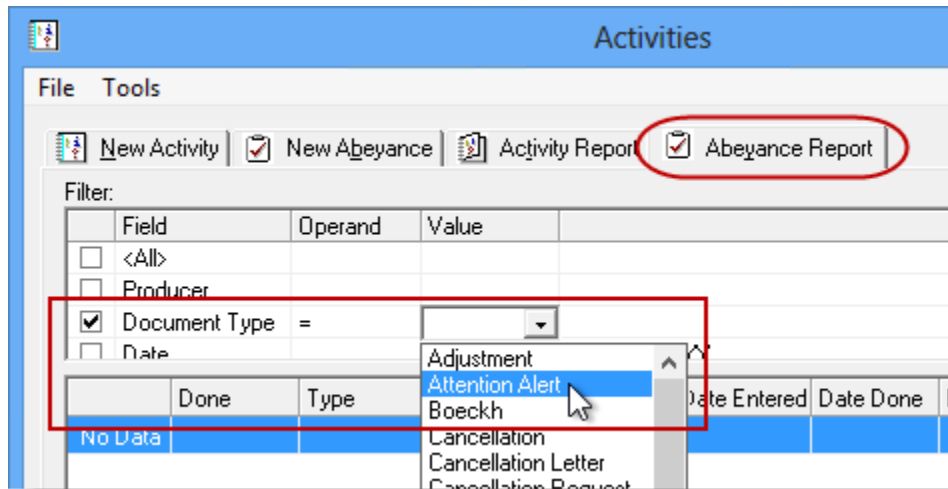
- Any open urgent Abeyances will display in **green text** in the Abeyance List, on the Abeyances tab in the Folder Details dialog, and in the Open Abeyances area in Folder View, as applicable.
- The **Abeyance List** can be filtered by Attention Alerts, if required, in the **View Items by Document Type** menu (see Figure 2.6).

(Figure 2.6)



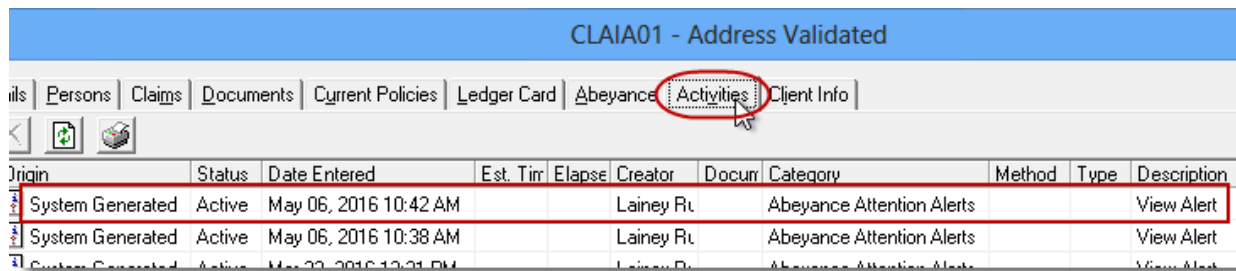
- The **Abeysance Report** in the Activities dialog can also be filtered by Attention Alerts in the **Document Type** field (see Figure 2.7).

(Figure 2.7)



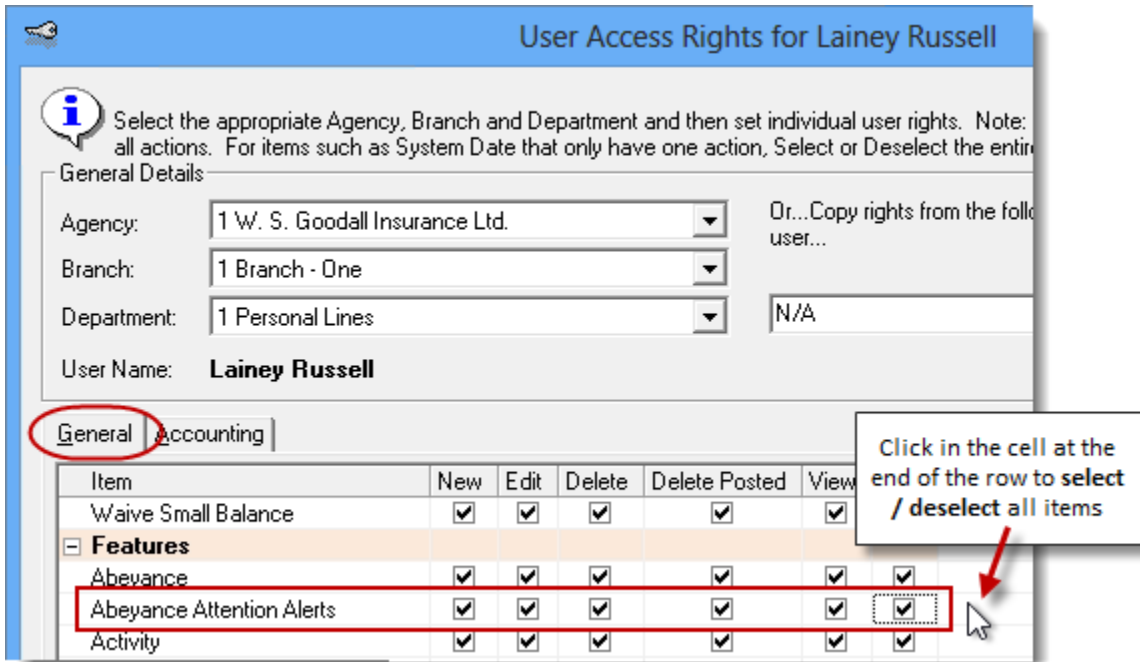
- Each time an urgent Abeysance is viewed (including when the Client or Broker folder is first opened), an Activity will be generated by the system (see Figure 2.8).

(Figure 2.8)



Please note, Abeysance Attention Alerts are managed through **User Rights** (through *Tools, Administrative, User Manager, Rights*). In the **User Access Rights** dialog, the Abeysance Attention Alerts User Rights are found on the **General** tab in the **Features** category (see Figure 2.9).

(Figure 2.9)



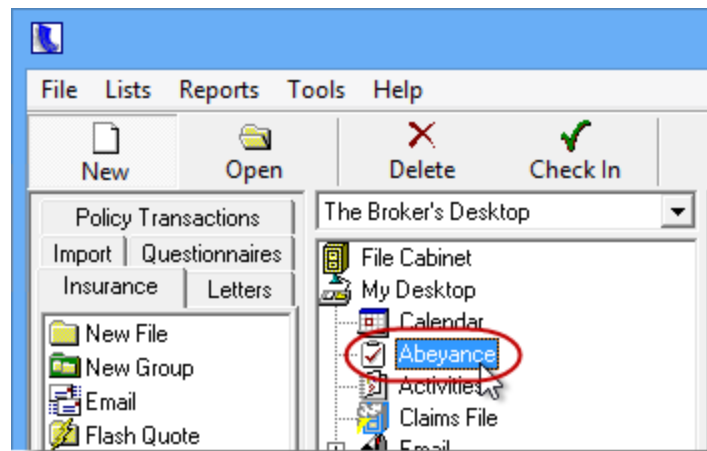
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### 3. Color-Coded Past Due Abeyances

Any outstanding Abeyances will now be highlighted in red so they can be quickly and easily identified. This includes Abeyances in the Master Abeyance list, the Abeyance Report in the Activities window, the Open Abeyances list in Folder View, and the Folder Abeyance list.

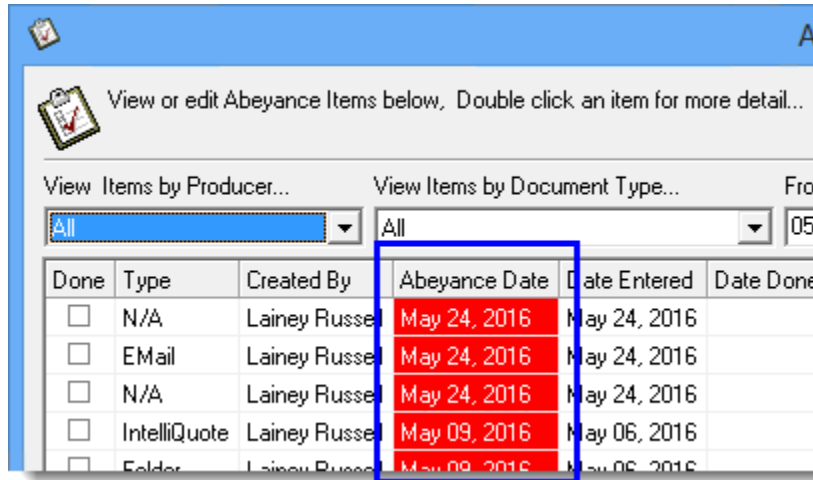
To open the Master Abeyance list, double-click **Abeyance** in the Desktop Tree (see Figure 3.1).

(Figure 3.1)



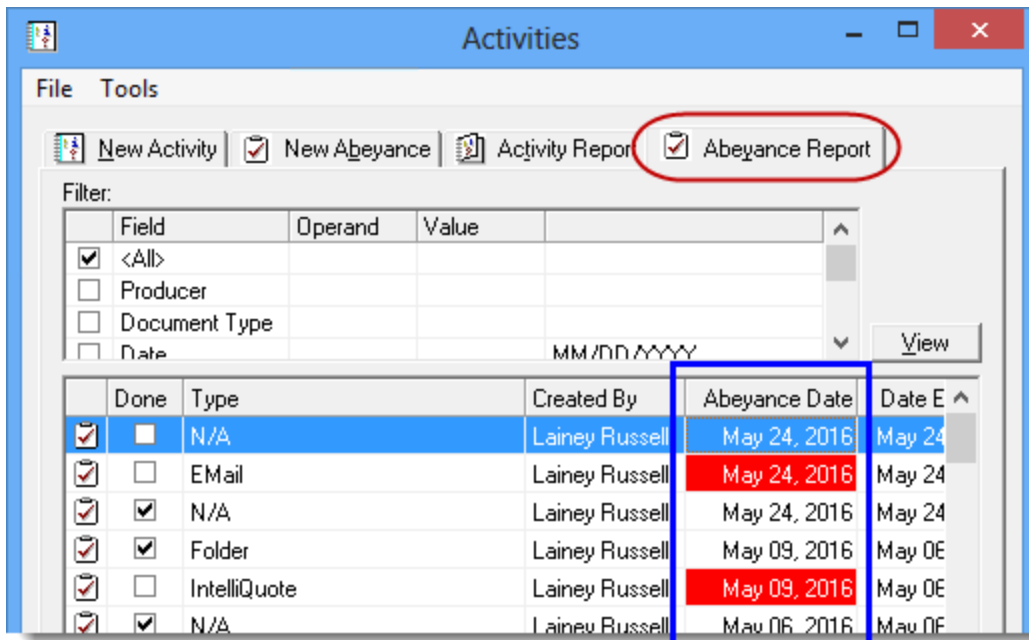
In the **Abeyance** dialog that displays, adjust filters, if needed. Note that any Abeyances with an **Abeyance Date** prior to the current date will be highlighted in red shading (see Figure 3.2).

(Figure 3.2)



Outstanding Abeyances will also be marked with red shading in the Abeyance Report in the Activities window. To create an Abeyance Report, double-click **Activities** in the Desktop Tree. On the **Abeyance Report** tab in the Activities window, apply filters and click the **View** button. Any past-due Abeyances will display with red shading (see Figure 3.3).

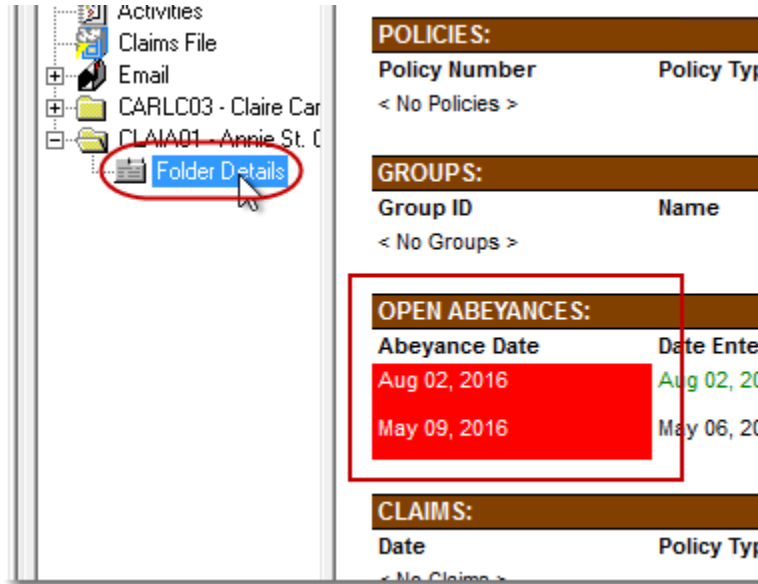
(Figure 3.3)



The Open Abeyances area in Folder View is another area where past-due Abeyances will appear with red shading. To access Folder View, click **Folder Details** once in the Desktop Tree. In the Document Window under **Open Abeyances**, any outstanding Abeyances will be shaded in red (see Figure 3.4).

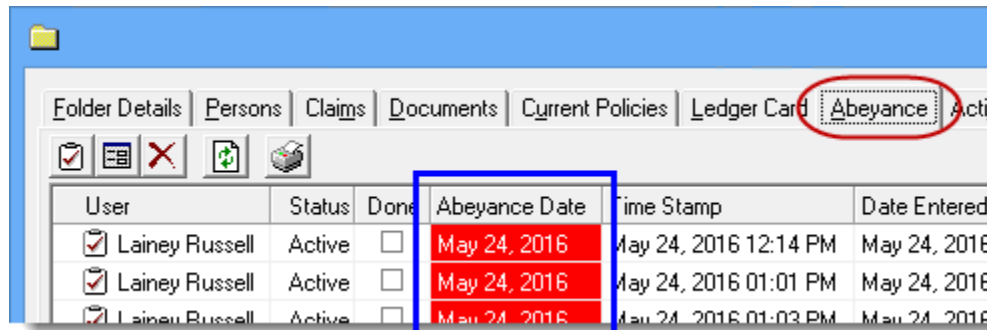


(Figure 3.4)



Past-due Abeyances in the Folder Abeyance list will also be identified with red shading. To view this list, double-click **Folder Details** in the Desktop Tree. On the **Abeyance** tab in Folder Details, any Abeyances with an **Abeyance Date** prior to the current date will be marked with red shading (see Figure 3.5).

(Figure 3.5)



When an outstanding Abeyance has been marked as “Done,” it will no longer be shaded in red.

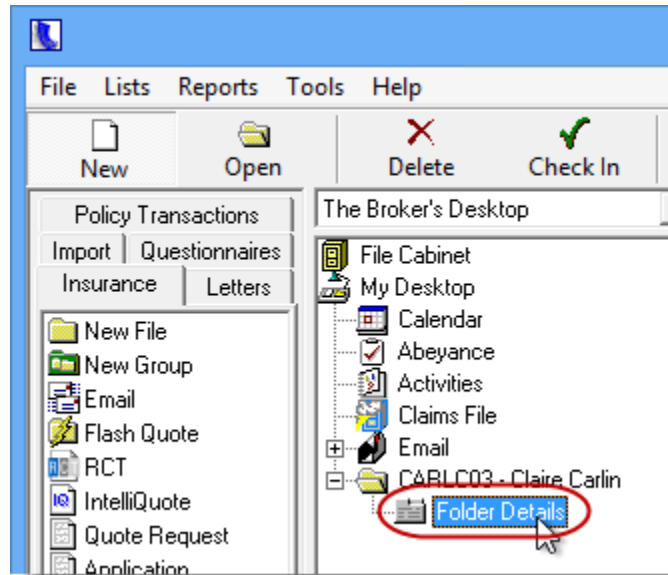
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## 4. Check Out Document from Activities Tab in Folder Details

In Folder Details, the TBW/TUW user can right-click an Abeyance on the Abeyances tab and select “Check Out” to open and view the attached document immediately in the Document Window. Now, in response to requests from our users, this “Check Out” feature is also available on the Activities tab in Folder Details.

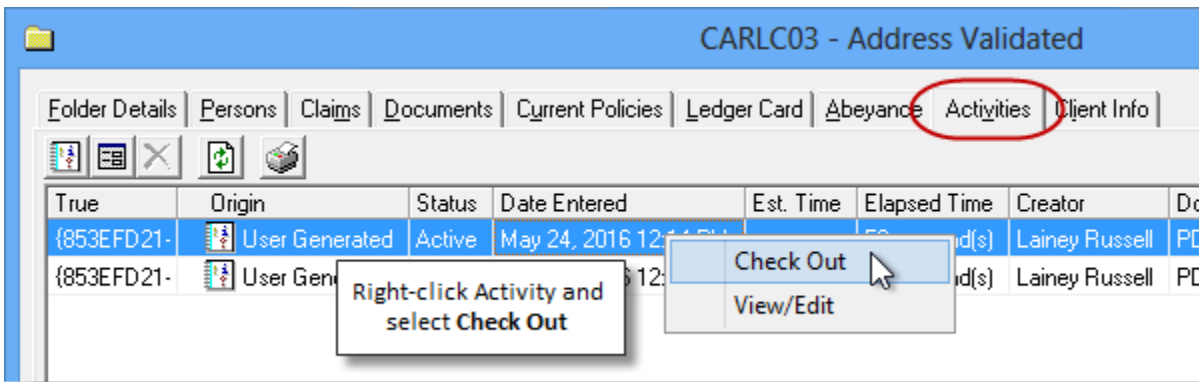
To view this new feature, first double-click **Folder Details** in the Desktop Tree to open the Folder Details window (see Figure 4.1).

(Figure 4.1)



On the **Activities** tab, right-click the target Activity, and select **Check Out** in the right-click menu (see Figure 4.2) to check out the attached document to the Desktop Tree and open it immediately in the Document Window. The Folder Details dialog will close automatically.

(Figure 4.2)



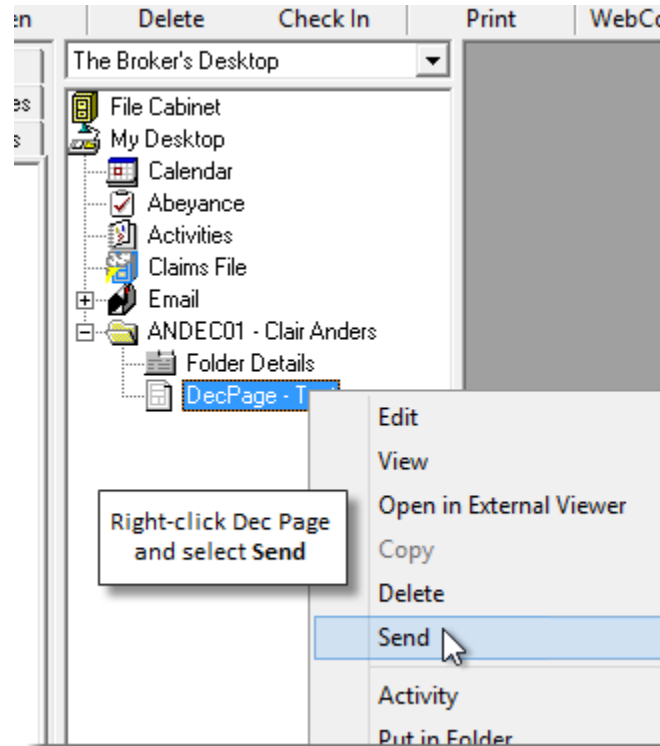
Please note, for a newly created or imported document, the Activity “Check Out” feature will be available as soon as the Client folder has been checked in and then checked out again. However, for an email message saved to the Client folder, the Activity “Check Out” feature will be available immediately for the associated email message.

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## 5. Right-Click and Email Dec Page from Desktop Tree

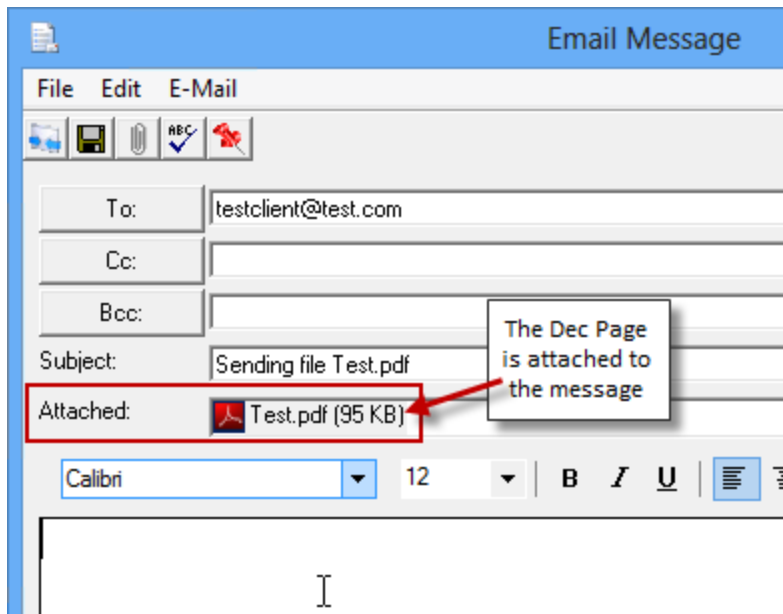
Now, the TBW/TUW user can quickly and conveniently email a Dec Page directly from the Desktop Tree using the right-click menu. When the Dec Page is available in the Desktop Tree, simply right-click the Dec Page and select **Send** (see Figure 5.1).

(Figure 5.1)



In the **Email Message** dialog that displays, note that the Dec Page has been attached to the message (see Figure 5.2). Complete and send the message in the usual way.

(Figure 5.2)



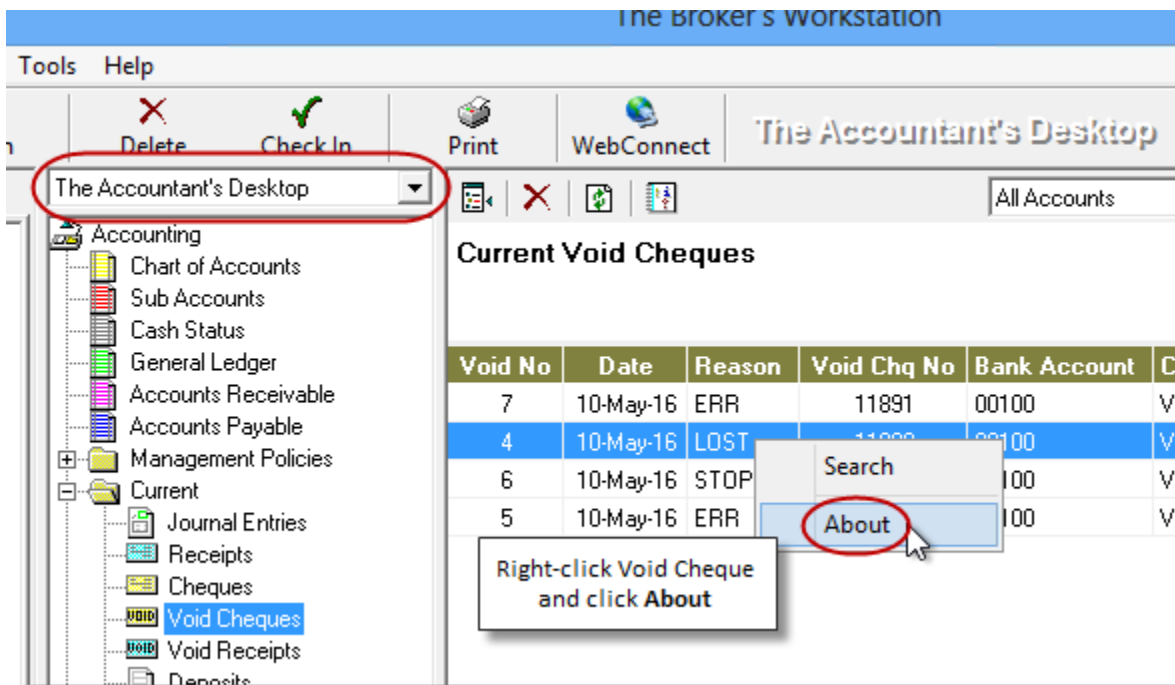
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## 6. "About" Feature in Void Cheques Current and Closed Periods Lists

The "About" feature is now available in the Void Cheques Current and Closed Periods lists on The Accountant's Desktop. To view additional details about a particular void cheque, simply right-click the item, and then select "About" in the right-click menu to view information about the void cheque.

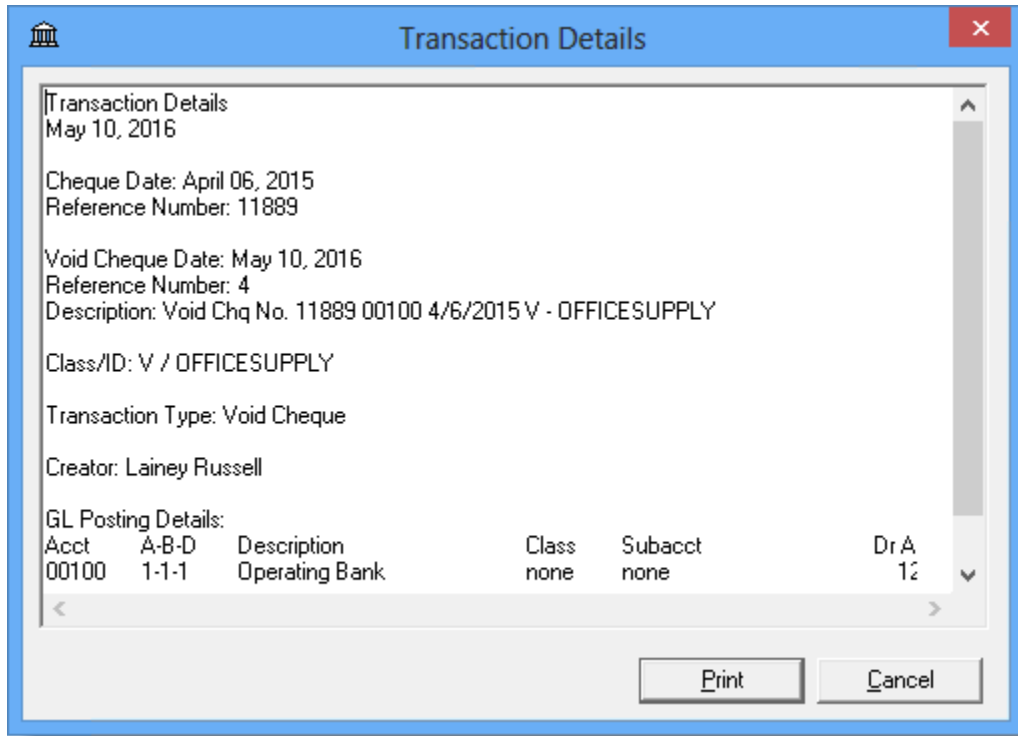
To view this feature, move to The Accountant's Desktop and open the Current or Closed Periods Void Cheques list in the usual way. Right-click the target item in the list and select **About** (see Figure 6.1).

(Figure 6.1)



In the **Transaction Details** window, view information about the void cheque, including the Creator, Cheque and Void Cheque Dates, GL Posting Details, and more (see Figure 6.2).

(Figure 6.2)



Click the **Print** button to print the information in the Transaction Details dialog, if required. When you are ready to return to the Void Cheques list, simply click **Cancel** or close the Transaction Details window.

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## 7. Notification of Checked Out Folders during Download Processing

A notification will display when a file cannot be processed during download because the associated Client folder is checked out of the File Cabinet.

When download processing has been completed, any documents that could not be processed because the corresponding Client folders were checked out will be listed in the report (see Figure 7.1).

(Figure 7.1)

**I-Biz Processing**

Date Created: May 13, 2016

**ID Source Legend:**

0 = Matched to Existing TBW Client; 1 = Created by TBW; 2 = Created by CSIO; 3 = Created by TBW (CSIO code unavailable)

NOTE: The following files could not be processed because the client folders were checked out. Check in these client folders and try again.

Pol Num	Client Code	Checked Out by
6000	REHR006 - Rosie Rehchuk	Mel Ash
6000	REHR006 - Rosie Rehchuk	Mel Ash

NOTE: The following documents could not be processed because they would create problems with duplicate policy numbers. Please request an initial load for these policies.

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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.



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Gold Independent Software Vendor (ISV)

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