



22 February 2017

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

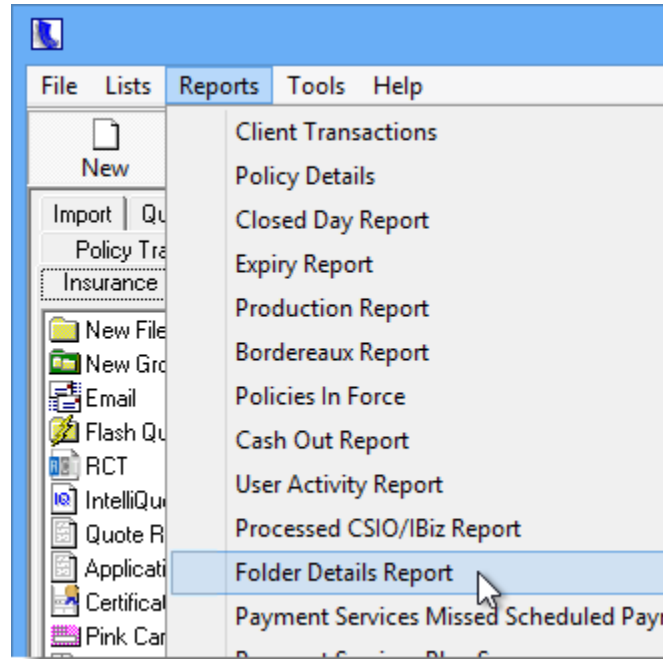
1. [Salutation Column added to Folder Details Report](#) – Salutation details can now be viewed and printed in the Folder Details Report.
2. [Print Expiry Report by Producer](#) – The Expiry Report has been improved with the option to print report results by producer, as required.
3. [Minimize a Pink Card](#) – Minimize the Pink Card window as needed to locate additional details or attend to another task. When you're ready, return to and complete the unfinished Pink Card.
4. [Extended Name Field in Folder Details \(TUW\)](#) – For TUW users, the Name field in Folder Details has been extended to accommodate very long client names. The full name entered in the Name field will display on Dec pages, but the name will be truncated, as applicable, on invoices and statements.
5. [Additional Options in O/A Field in Folder Details \(TUW\)](#) – In The Underwriter's Workstation, additional options are now available for selection in the O/A field in Folder Details.

1. Salutation Column added to Folder Details Report

The Folder Details Report allows the TBW/TUW user to generate a report listing all or target clients, groups, or brokers, as well as applicable folder details, including Client ID, Address, Current Status, and more. Now, the Folder Details Report also includes a Salutation column.

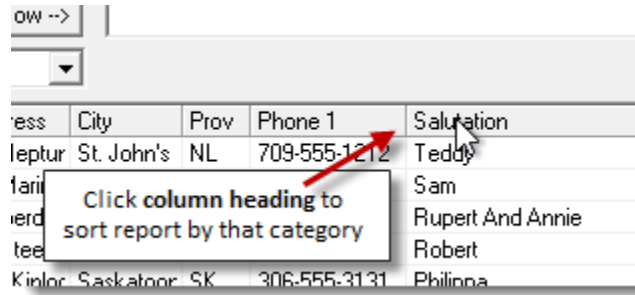
To generate a Folder Details Report, click **Reports, Folder Details Report** in the TBW/TUW window (see Figure 1.1).

(Figure 1.1)



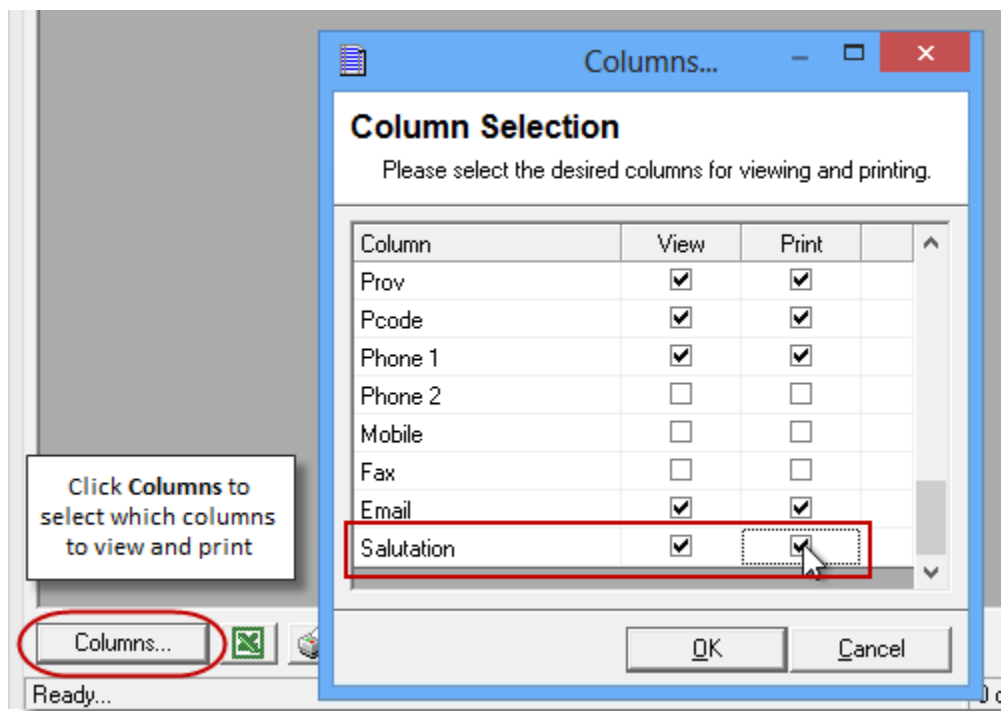
In the **Folder Details Report** dialog, enter search criteria and click **OK** to generate the report. Note that a **Salutation** column is now available in report results (see Figure 1.2).

(Figure 1.4)



To adjust which columns will display in the report and which columns will print when report results are printed, click the **Columns** button to open the **Column Selection** box. Note that **Salutation** has been added to the list of columns that can be displayed and printed (see Figure 1.5).

(Figure 1.5)



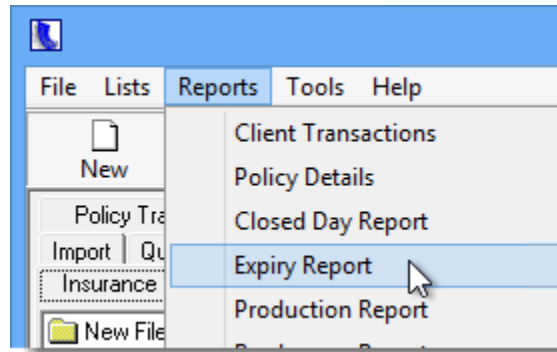
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2. Print Expiry Report by Producer

The Expiry Report has been improved with the option to print the report either in its usual format or in a batch of individual producer reports.

To create an Expiry Report, click **Reports, Expiry Report** (see Figure 2.1).

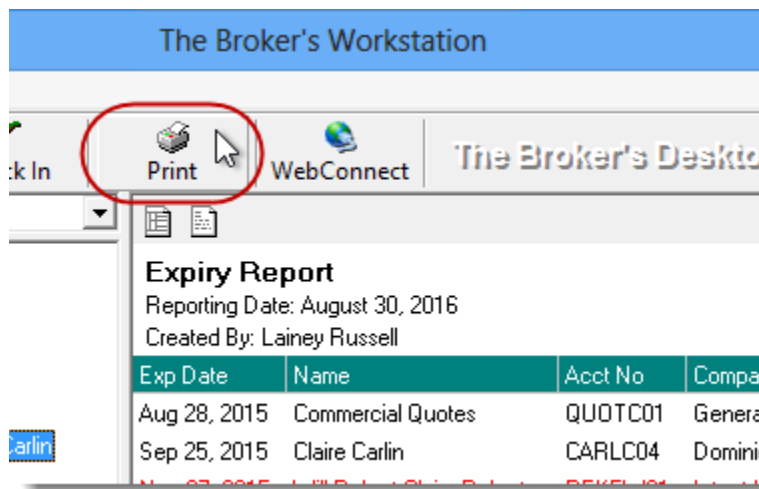
(Figure 2.1)



In the **Expiry Report** dialog that displays, enter report criteria as required, and then click **View** to generate the report.

Report results will display in the Document Window. To print the report, click the **Print** button on the TBW toolbar (see Figure 2.2).

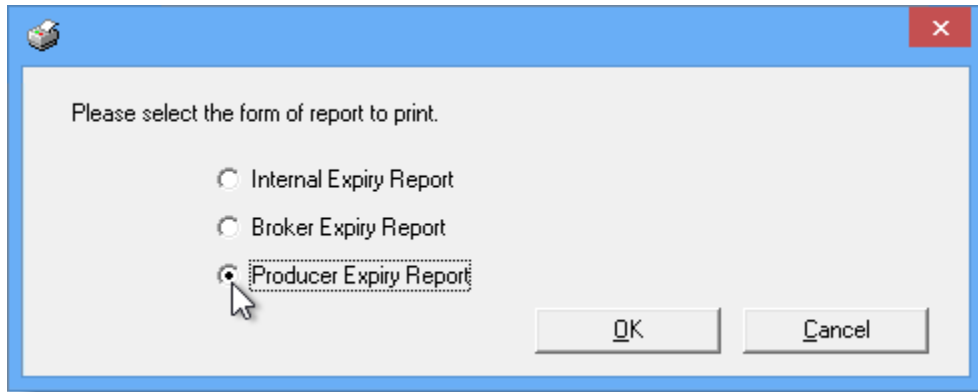
(Figure 2.2)



In the **Print** dialog, select the form of report to print, and click **OK** (see Figure 2.3).

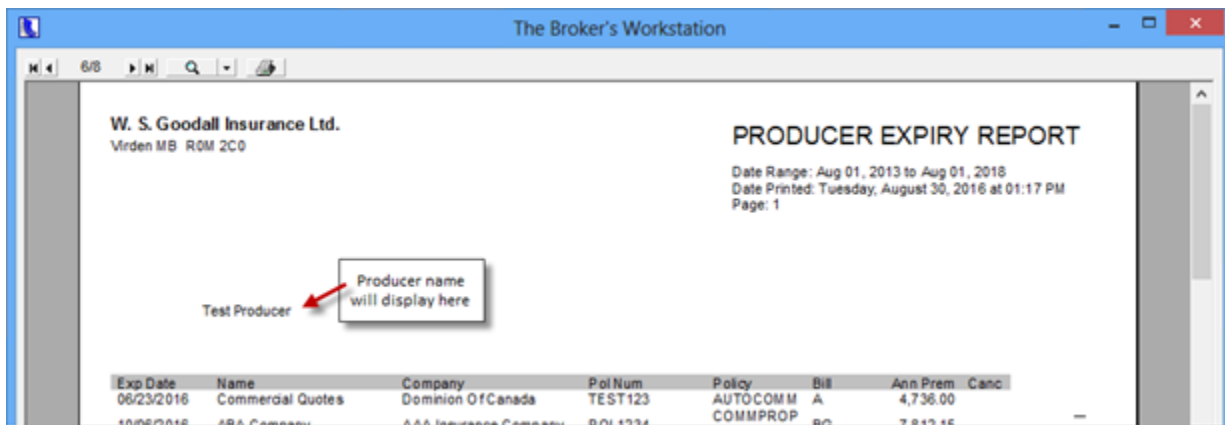
- As applicable, select **Internal Expiry Report** to print a copy of the report in the usual manner (as it displays in the Document Window), select **Broker Expiry Report** to print a batch of individual broker reports, or select **Producer Expiry Report** to print a batch of individual producer reports.

(Figure 2.3)



If **Print Preview** is enabled (through *Tools, Options, Printing*), first preview and then print the report. When the **Producer Expiry Report** option is selected for printing, each individual Producer Expiry Report will display on a new page with appropriate header information. Policy details in this report include *Expiry Date, Insured Name, Company, Policy Number, Policy Type, Bill Type, Annualized Premium, and Cancelled (yes/no)* (see Figure 2.4).

(Figure 2.4)



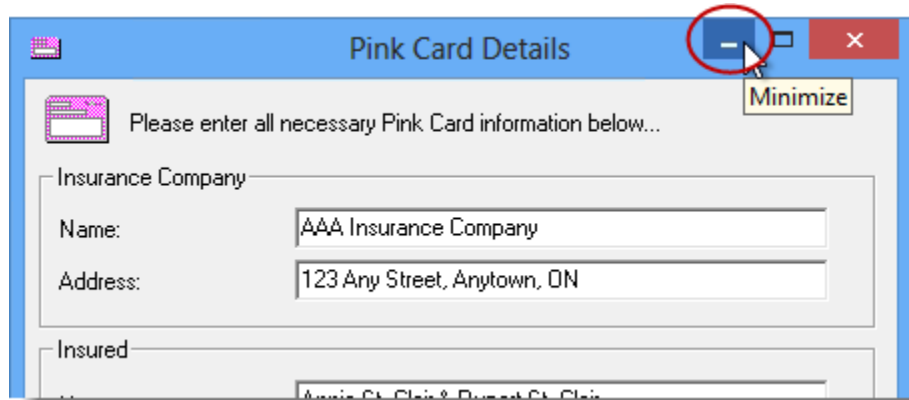
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3. Minimize a Pink Card

The Pink Card feature has been improved with the ability to minimize the Pink Card window. Now, when you are creating a Pink Card, you can minimize the Pink Card window as needed to locate additional details or attend to another task. When you're ready, return to and complete the unfinished Pink Card.

To view this improvement, create a Pink Card in the usual way by dropping the Pink Card icon on the Client folder or document in the Desktop Tree. As you enter requested details in the **Pink Card** window, click the **Minimize** button in the top right corner of the window at any time to set the window aside (see Figure 3.1). This action will save and store all details already entered.

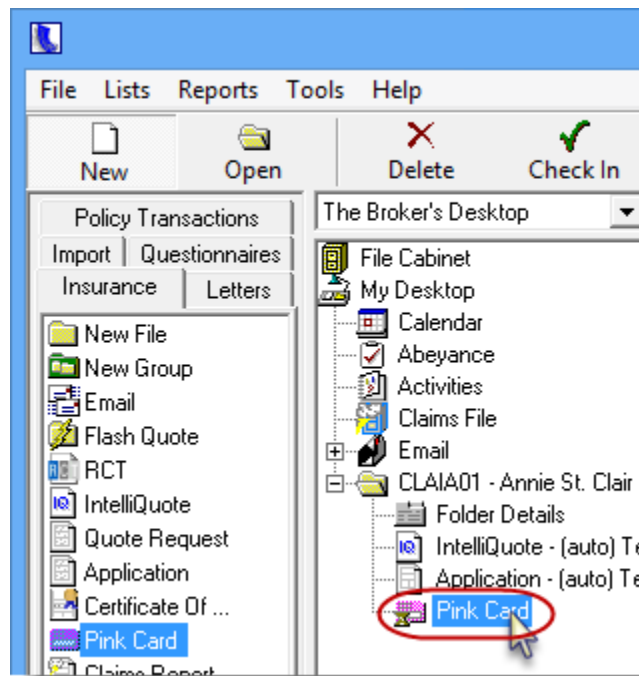
(Figure 3.1)



After you have clicked the **Minimize** button, the minimized Pink Card will display in the Desktop Tree with a unique icon identifying it as an incomplete document (see Figure 3.2).

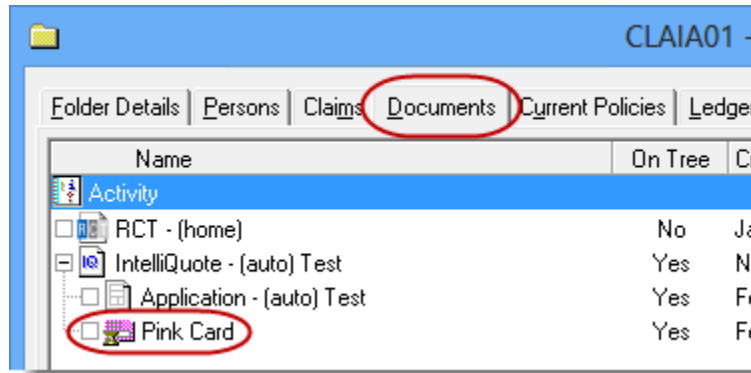
- Once the Pink Card has been created, this icon will be replaced with the standard Pink Card icon.

(Figure 3.2)



The incomplete Pink Card is available, as well, on the **Documents** tab in **Folder Details**. In Folder Details, any incomplete Pink Card will also be clearly marked with the “incomplete Pink Card” icon (see Figure 3.3).

(Figure 3.3)



When a Pink Card has been minimized, you can make changes to the corresponding IntelliQuote, access the Client folder for additional information, open and work with another Client folder or document, assist a customer, or complete other tasks, as needed. If a vehicle is added to or deleted from the corresponding IntelliQuote, the minimized Pink Card will update automatically with those details.

When you are ready to return to the Pink Card window, double-click the Pink Card in the Desktop Tree. The Pink Card dialog will open, displaying all information already entered.

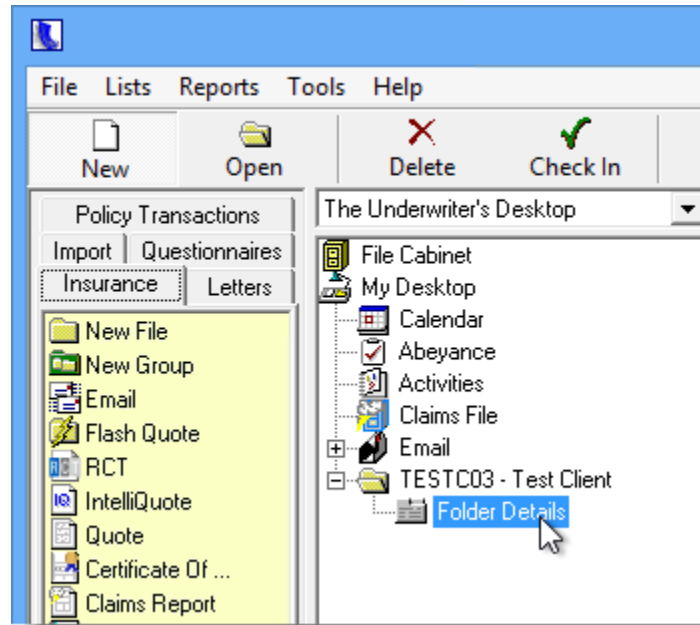
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4. Extended Name Field in Folder Details (TUW)

TUW users have requested additional space in the Name field in Folder Details to accommodate very long client names. In response to this request, the Name field has been extended to accommodate up to 2000 characters.

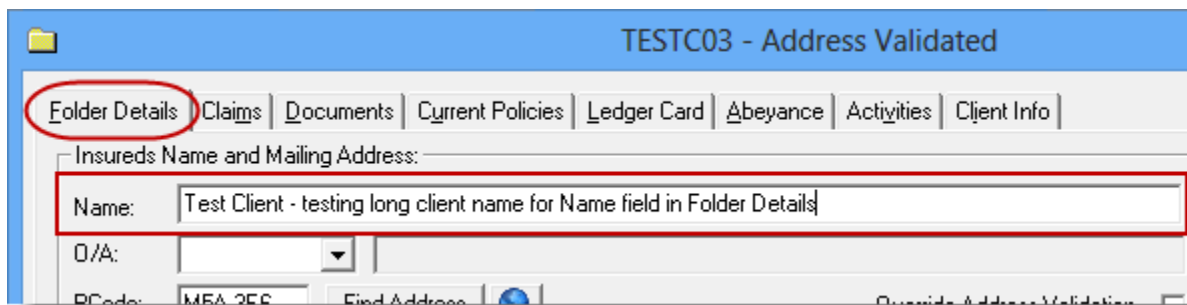
To view the extended Name field, double-click **Folder Details** in the Desktop Tree (see Figure 4.1).

(Figure 4.1)



In the Folder Details dialog, the **Name** field is found on the **Folder Details** tab (see Figure 4.2).

(Figure 4.2)



The entire name entered in the Name field will display and print on Dec Pages. However, longer client names will be truncated as needed to fit in existing fields on invoices and statements (see Figure 4.3).

(Figure 4.3)

INVOICE		
Account	TESTCO	
Policy	Test123	
Invoice	1582	
Date	Feb 01,	
Page	1	
Account Executive		
W. S. Goodall Insurance Ltd.		
Account Representative		
Client Name	Policy Number	Policy Period
Test Client - testing long client name f... Toronto ON M5A 3E6	Test1234567	Feb 01 2017 - Feb

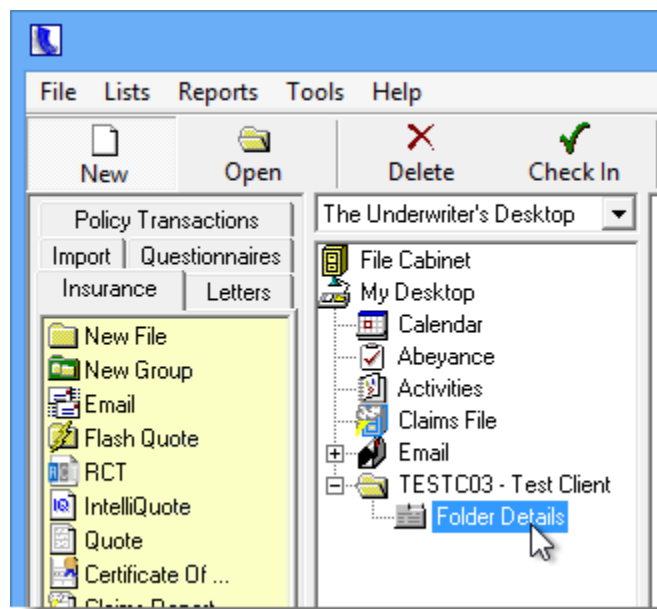
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5. Additional Options in O/A Field in Folder Details (TUW)

In The Underwriter's Workstation, additional options are now available for selection in the O/A (Operating As) field in Folder Details.

To view this enhancement, first double-click **Folder Details** in the Desktop Tree (see Figure 5.1).

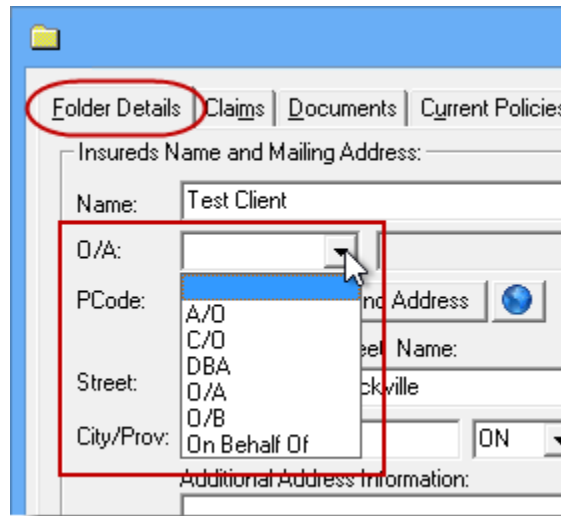
(Figure 5.1)



On the **Folder Details** tab in the Folder Details window, note that additional options have been added to the **O/A** drop-down menu (see Figure 5.2). The menu options now include the following:

- A/O = And/Or
- C/O = Care Of
- DBA = Doing Business As
- O/A = Operating As
- O/B = Operated By
- On Behalf Of

(Figure 5.2)



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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 (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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