



24 July 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*

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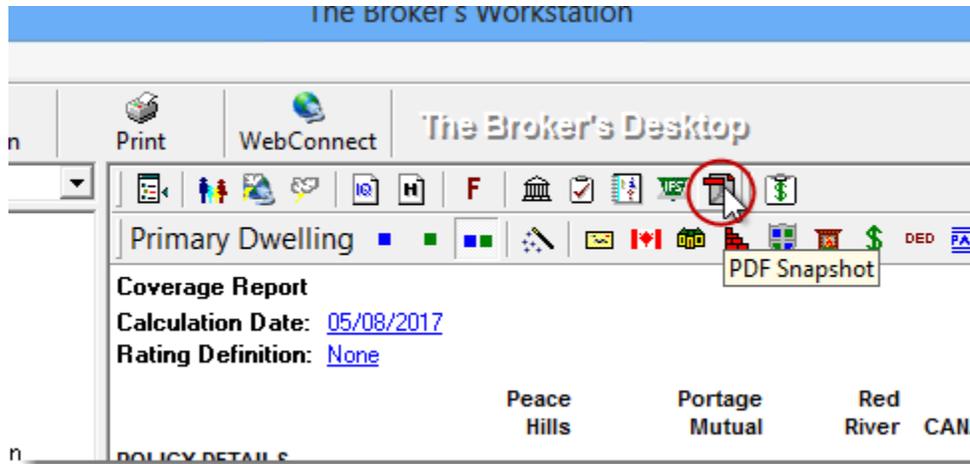
1. [Underwriting Details Report included in Persisted Farm IQ](#) – When a Farm IntelliQuote is persisted, an underwriting details report will now be included in the persisted document.
2. [Hover to View Full Abeyance Description in Folder Details](#) – On the Abeyance tab in Folder Details, hover your mouse pointer over the description of an Abeyance to view a tooltip displaying full description details.
3. [Set Default Cash Drawer in Receipt Form as "None"](#) – The Receipt of Payment form has been updated with the option to set the default Cash Drawer as "None."

### 1. Underwriting Details Report included in Persisted Farm IQ

When a Habitational or Auto IntelliQuote is persisted (saved in PDF format) in TBW/TUW, the last page of that persisted document provides the underwriting details of the risk. In response to requests from our users, the persisted Farm IQ has been improved to include the same type of underwriting details report.

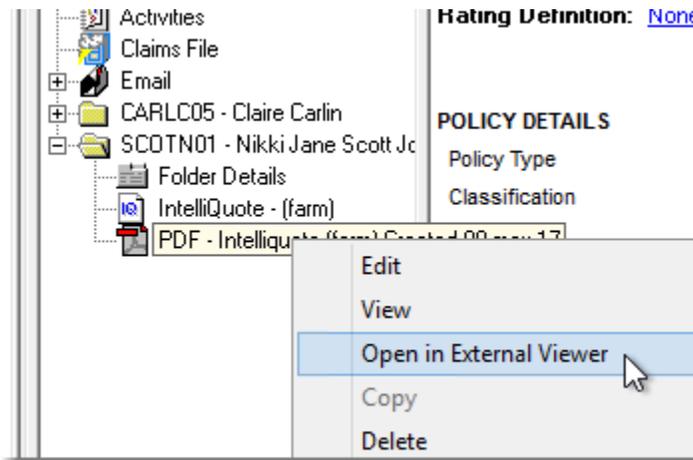
To persist a Farm IntelliQuote, simply click the **PDF Snapshot** button on the IQ toolbar (see Figure 1.1). Adjust the document name in the **Get Doc Name** window as needed, and click **OK**.

(Figure 1.1)



The newly created persisted document will display in the Desktop Tree, identified with a **PDF** icon. Double-click the persisted document to open it in the Document Window, or right-click the document and select **Open in External Viewer** to view it in its own window (see Figure 1.2).

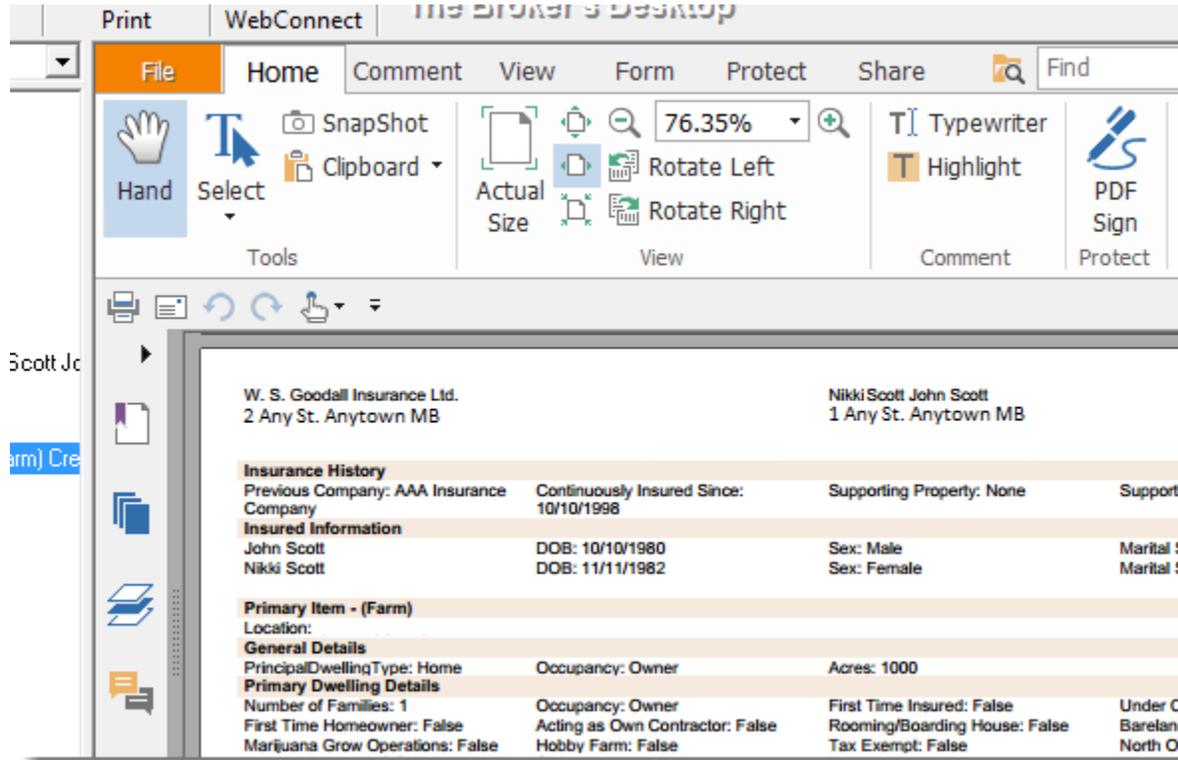
(Figure 1.2)



In the PDF document, scroll to view details for the Farm IQ, noting the new underwriting details report on the last page of the document (see Figure 1.3).

- Insured information, primary dwelling details, construction details, and other important information is displayed in this section.

(Figure 1.3)



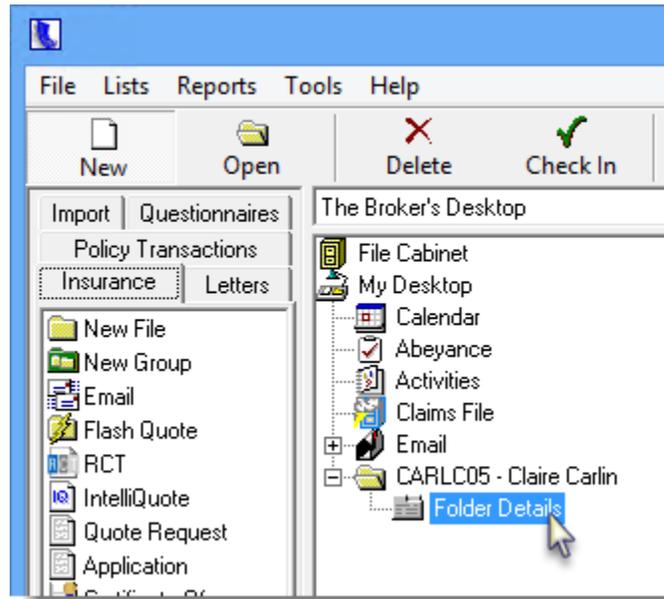
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## 2. Hover to View Full Abeyance Description in Folder Details

On the Abeyance tab in Folder Details, you can now hover your mouse pointer over the description of an Abeyance to view a tooltip displaying full description details.

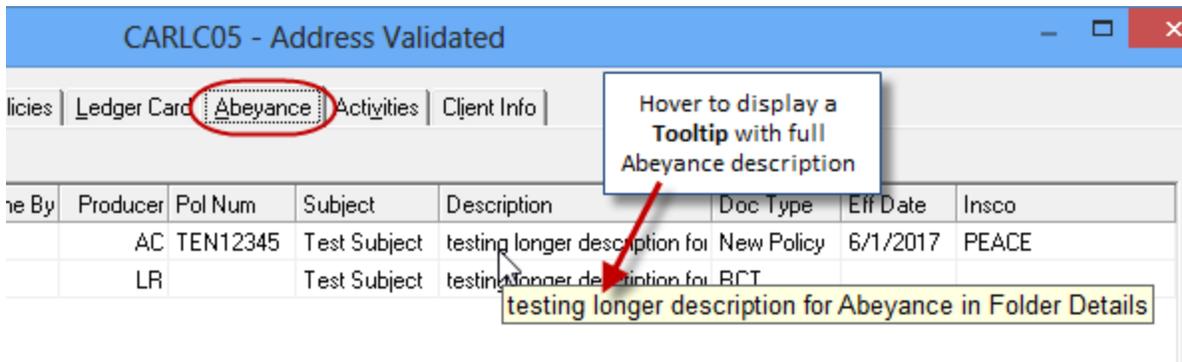
To view this improvement, first double-click **Folder Details** in the Desktop Tree to open the Folder Details window (see Figure 2.1).

(Figure 2.1)



On the **Abeyance** tab in Folder Details, hover your mouse pointer over a description in the **Description** column. A tooltip will display, showing the full abeyance description (see Figure 2.2).

(Figure 2.2)



Please note, this feature is also available when a folder is viewed as “read-only.”

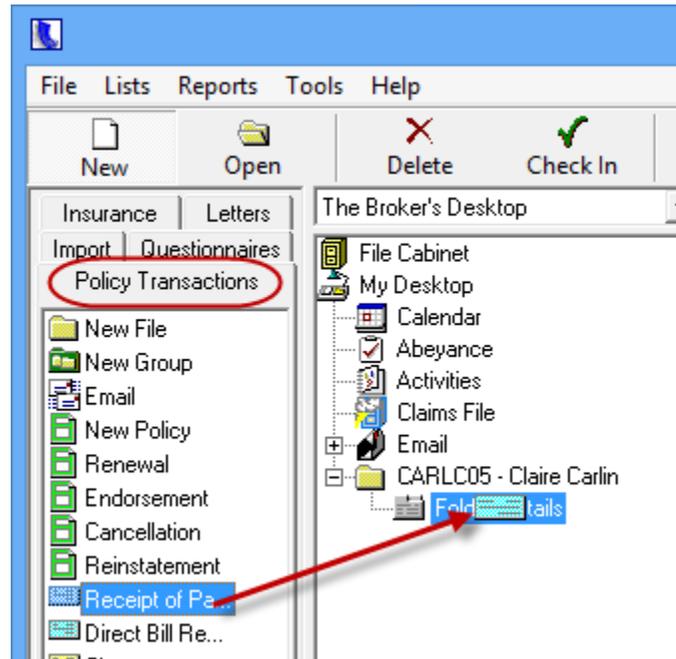
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### 3. Set Default Cash Drawer in Receipt Form as “None”

The Receipt of Payment form has been improved with the option to set the default Cash Drawer as “None.” This enhancement, which ensures the user is required to select the relevant Cash Drawer whenever a receipt is created, is applicable for both client and Accounting receipts.

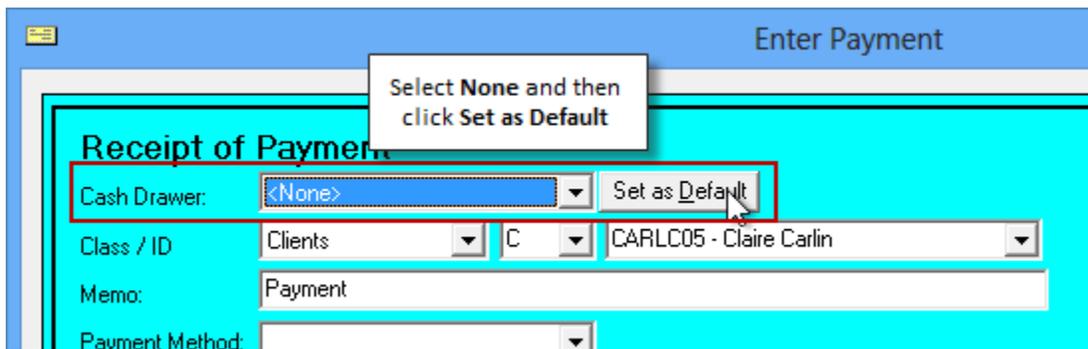
To set the default Cash Drawer to “None,” drag and drop the **Receipt of Payment** icon from the **Policy Transactions Tray** onto the folder or document in the Desktop Tree (see Figure 3.1).

(Figure 3.1)



In the **Enter Payment** dialog, ensure the Cash Drawer field is set to **<None>**, and click the **Set as Default** button (see Figure 3.2). Then, either click **Close** to close the form without creating a new receipt, or proceed to enter receipt details to create a new receipt, if required.

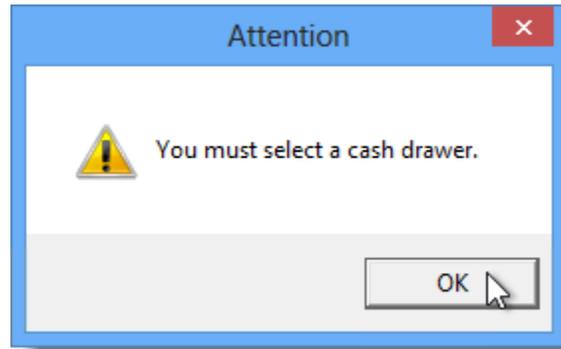
(Figure 3.2)



Once the Cash Drawer default has been set to "None" in the Enter Payment form, the Cash Drawer field will automatically display the "None" option whenever you create a new Receipt of Payment. Simply select the applicable Cash Drawer and enter receipt details to create the receipt in the usual way.

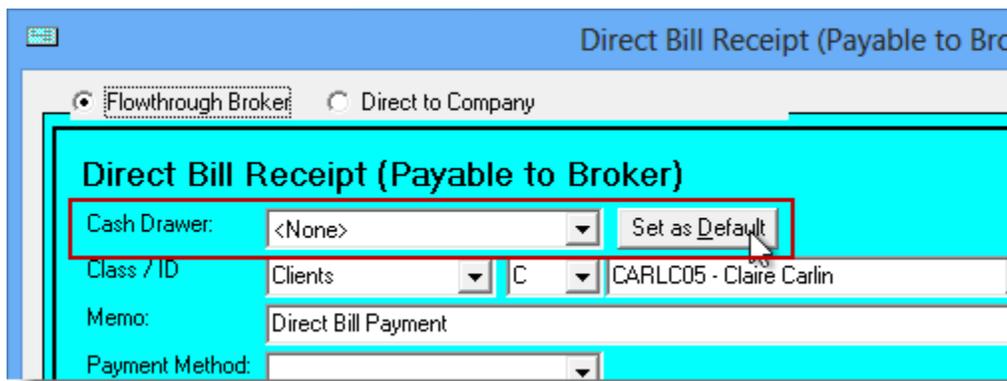
- If the default Cash Drawer is set to "None," but no Cash Drawer is selected when you enter receipt details in the Receipt form, you will be prompted to select the applicable Cash Drawer (see Figure 3.3).

(Figure 3.3)



- The ability to set “None” as the default Cash Drawer is available for Flowthrough Direct Bill Receipts, as well (see Figure 3.4).

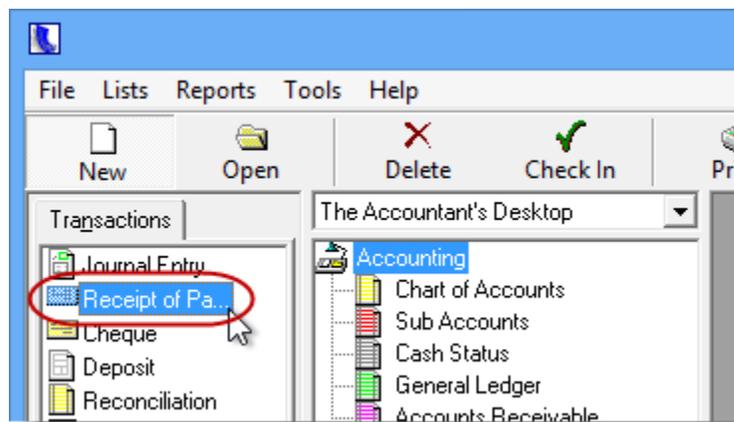
(Figure 3.4)



- This default Cash Drawer selection in the Receipt form can be adjusted at any time simply by selecting the applicable Cash Drawer and then clicking the **Set as Default** button.

On The Accountant’s Desktop, the default Cash Drawer for Accounting Receipts can also be set to “None,” as required. To select the default Cash Drawer for Accounting Receipts, double-click the **Receipt of Payment** icon in the **Transactions Tray** (see Figure 3.5) to open the **GL Receipt** form.

(Figure 3.5)



In the GL Receipt form, ensure **<None>** is selected in the **Cash Drawer** field, and then click the **Set as Default** button (see Figure 3.6). Either close the form or carry on to enter receipt details to create a new receipt.

(Figure 3.6)



Once the Cash Drawer default has been set to “None” in the GL Receipt form, the Cash Drawer field will automatically display the “None” option whenever you create a new GL Receipt. Select the applicable Cash Drawer and enter receipt details to create a receipt in the usual way.

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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.



**Microsoft** Partner

Gold Independent Software Vendor (ISV)

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