



1 June 2018

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

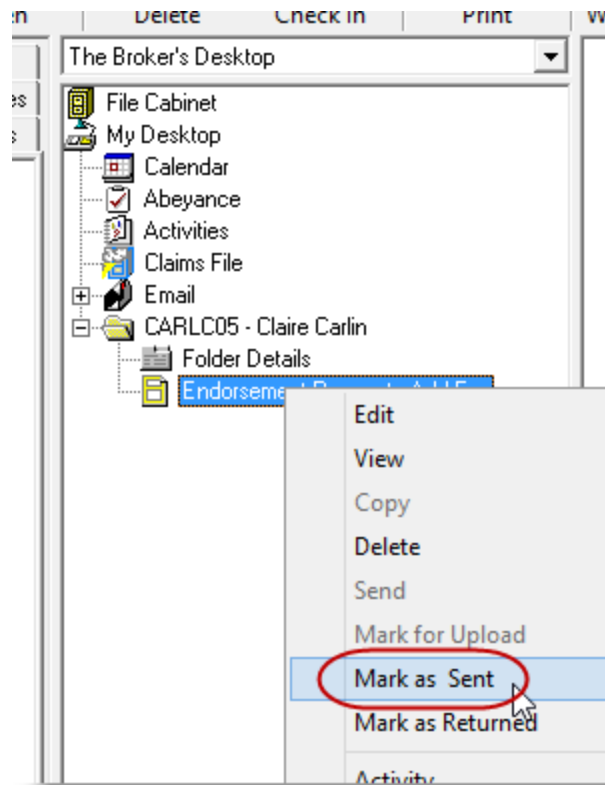
1. [Matching Request Documents Marked as "Completed"](#) – Requesting documents that have been manually marked as "Sent" will now automatically be updated with a status of "Completed" once matched with a corresponding CSIO Endorsement, Cancellation, or Reinstatement download.

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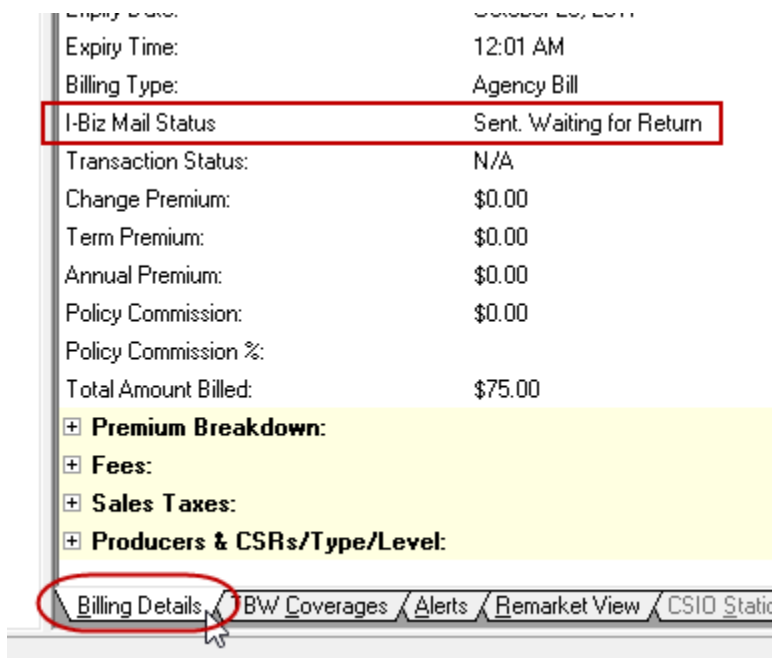
This enhancement is available only for request documents with a status of "Sent Waiting for Return." To set the status of a request document as "Sent Waiting for Return," right-click the document in the Desktop Tree and, in the right-click menu, select **Mark as Sent** (see Figure 1.1).

(Figure 1.1)



- The current **Status** can be viewed on the document's **Billing Details** tab (see Figure 1.2).

(Figure 1.2)



As Endorsement, Cancellation, and Reinstatement documents are downloaded during the CSIO download process, they are automatically assessed and matched with requesting documents (based on Policy Number, Effective Date, and Expiry Date). When a match is found, the status of any requesting document previously marked as **Sent** will automatically be updated to **Completed** (see Figure 1.3).

(Figure 1.3)

Expiry Date:	October 20, 2011
Expiry Time:	12:01 AM
Billing Type:	Agency Bill
I-Biz Mail Status	Completed
Transaction Status:	N/A
Change Premium:	\$0.00
Term Premium:	\$0.00
Annual Premium:	\$0.00

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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.



Microsoft Partner

Gold Independent Software Vendor (ISV)

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