



23 April 2008

To: The Broker's Workstation Users

Dear Valued Client:

Re: THE BROKER'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):

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1. Improved Auto Coverages View

TBW Users have requested an Auto Policies view that is easier to read, understand, and navigate to locate important information. We are pleased to announce the development of a completely redesigned and improved Auto Coverages View that is not only easier to understand and use, but compact, as well.

Some of the improvements that have been made to the Auto Coverages View are as follows:


- The **< Add / Edit... >** option now conveniently appears both at the top and at the bottom of the view.
- The **Total Policy Premium** is now located at the top of the view, eliminating the need to immediately scroll to see the premium.
- New toolbar buttons collapse or expand all vehicles at one time, allowing for either a summary view of all vehicles or a detailed view of each vehicle.
- Each vehicle is easily distinguishable from the next by use of coloured shading in both the Collapsed and the Expanded Views.
- The **Collapsed View** of a vehicle displays the vehicle type and premium.
- The **Expanded View** offers the following improvements:
 - A vehicle's total premium is displayed at the top of the Expanded View of the vehicle.
 - All information about the vehicle, including endorsements and discounts, is grouped together.
 - Occasional Drivers are listed with the vehicle information.
 - The number of columns changes if the vehicle has 05 and/or 06 drivers.
 - Rate Groups are combined on one line.
 - Driver Classes / Record are combined on one line.

The following screen shots (Figures 1.1 and 1.2) highlight the improvements that have been made to the Auto Coverages View:

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COLLAPSED (SUMMARY) VIEW

(Figure 1.1)



Endorsement Request - Policy # ANC 5532358
 Created By: Administrator on March 26, 2007 - Revised on: April 19, 2007
 Client: Anthony Vanderlee Delphine Vanderlee

Name And Address of Insured: < Add/Edit... >
 Anthony Vanderlee Delphine Vanderlee
 PO BOX 854 Stettler AB T0C 2L0
 PHONE: 403-742-0074

Policy Period: From: Mar 26, 2007 To: Aug 31, 2007
Policy Number: ANC 5532358

TOTAL PREMIUM **\$3,678**

± People (3)

± Claims (1)

| | | | |
|--------------------------|------------------------------|-------------------|----------------|
| <input type="checkbox"/> | 2003 HONDA () | ATV | \$361 |
| <input type="checkbox"/> | 1991 SUZUKI () | ATV | \$361 |
| <input type="checkbox"/> | 2001 RELIABLE (0) | Commercial | \$24 |
| <input type="checkbox"/> | 2003 FEATHERLITE (0) | Commercial | \$342 |
| <input type="checkbox"/> | 2003 FORD (0) | Commercial | \$904 |
| <input type="checkbox"/> | 1968 CHEV CMARO (5501) | Private Passenger | \$1,012 |
| <input type="checkbox"/> | 2006 FORD F350SDCW4WD (3763) | Private Passenger | \$650 |
| <input type="checkbox"/> | 2006 FEATHERLITE (0) | Commercial | \$24 |
| <input type="checkbox"/> | TOTAL PREMIUM | | \$3,678 |

< Add/Edit... >

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EXPANDED (DETAILED) VIEW

(Figure 1.2)

| Endorsement Request - Policy # ANC 5532358 | | | |
|--|--|----------------|----------------|
| Created By: Administrator on March 26, 2007 - Revised on: April 19, 2007 | | | |
| Client: Anthony Vanderlee Delphine Vanderlee | | | |
| Accident Benefits | | \$13 | |
| Coll - \$250 | | \$514 | |
| Comp - \$250 | | \$114 | |
| End. # 27 - Phys. Damage Non-Owned Auto | | \$40,000 limit | |
| End. # 13D - Limited Glass | | | |
| End. # 44 - Family Protection | | \$1,000,000 | \$23 |
| 1968 CHEV CMARO (5501) | Private Passenger | | \$1,012 |
| VIN | 124378N343844 | | |
| Body Type | Private Passenger - 2 Door Sedan/Hard Top (P2) | | |
| Principal | ANTHONY VANDERLEE | | |
| Rating Territory | Territory 03 | | |
| Vehicle Use | Pleasure | | |
| Rate Groups | AB: 3 Coll: 7 Comp: 11 | | |
| Relevant Driver (Anthony Vanderlee) | Calc Grid Level -15 | | \$719 |
| Occasional Driver (Morgan Vanderlee) | Calc Grid Level -2 | | \$324 |
| Operator | Principal | Occ. | |
| Class/TPL/Coll | 01 / 06 / 06 | 06 / 03 / 03 | |
| Accident Benefits | \$35 | | |
| Coll - \$500 | \$98 | \$172 | |
| Comp - \$250 | \$82 | | |
| End. # 13D - Limited Glass | | | |
| End. # 20 - Loss Of Use | \$500 limit | | |
| End. # 44 - Family Protection | \$1,000,000 | | \$23 |
| 2006 FORD F350SDCW4WD (3763) | Private Passenger | | \$650 |
| VIN | 1FTWW31P56EB80593 | | |
| Body Type | Pickup Truck (PV) | | |

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2. Agency and Branch Naming Enhancement

TBW Users have requested an Agency-Branch-Department naming scheme that better addresses the needs of larger organizations where multiple corporations are operating collectively or where multiple offices within one corporation have several operating names. We are pleased to announce the development of an Agency and Branch Naming Enhancement that allows assigning of different Branch names, as well as the use of those names on documents to properly reflect the organization producing the transaction.

This new naming scheme allows for addition and use of two Branch names:

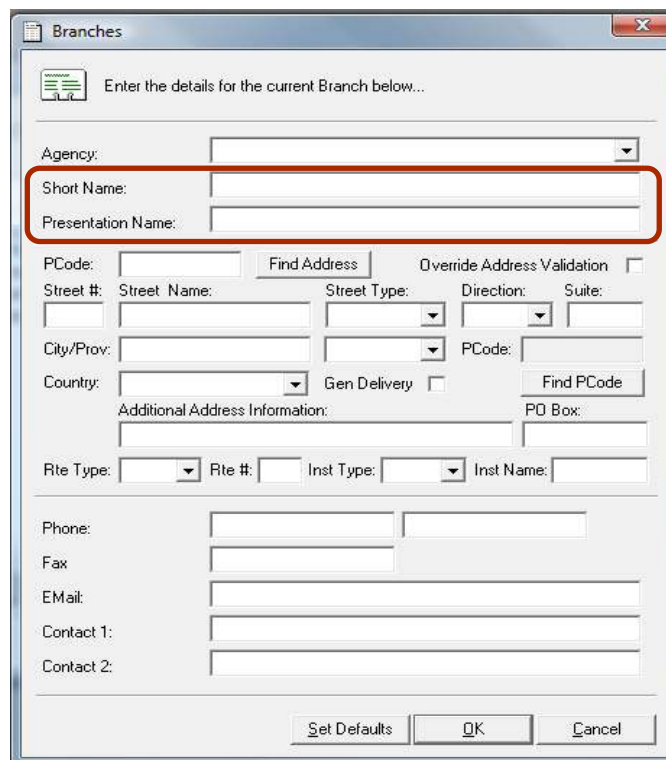
1. A **Branch Short Name** used for internal purposes, such as selecting reporting options and describing reports, and
2. A **Branch Presentation Name** that is used for external purposes and will appear on output documents (e.g. invoices, AR statements, receipts, etc.) for clients, carriers, etc.

Use and management of this new name-management option occur in the following locations:

a. Branch Codes

In Lists creation, the Branch Codes form has been slightly changed so the Branch Short Name and the Branch Presentation Name can be entered (Figure 2.1).

(Figure 2.1)



Note the following when completing the Branch Codes window:

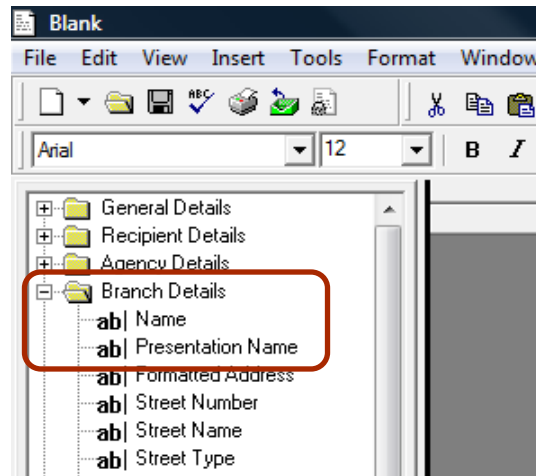
- Once the Agency has been selected from the drop-down menu, the Presentation Name field will automatically default to the Agency Name. This can be overwritten by simply clicking and typing in the field.
- Both the Short Name and Presentation Name fields must be completed before the Branch information can be saved or edited.
- Agency / Branch / Department drop-down menus throughout TBW will provide the Branch Short Name options for Branch selection.

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b. Printed Output Documents

In word processing documents, use the Name field under Branch Details for the Branch Short Name, and the Presentation Name field for the Branch Presentation Name (Figure 2.2).

(Figure 2.2)



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3. Direct Bill Policy Accounting Options

TBW Users have requested an option to account for direct-billed policies on a cash basis. We are pleased to announce that TBW Users can now select either to account for direct-billed policies on a cash basis or to account for direct-billed policies on an accrual basis.

Use and management of this Direct Bill Accounting Method option occur in the following locations:

a. Demographics

In Demographics / G/L Control, either **Accrual Basis** or **Cash Basis** can be selected for the Direct-Bill Accounting Method (Figure 3.1). In the Accounting Tree, expand Management Policies and double click Demographics. Select the Options tab in the G/L Control window.

(Figure 3.1)

Note the following when selecting a Direct Bill Accounting Method option:

- The Accounting Method selected is a system-wide setting.
- The Accrual Basis option is the default entry.
- Policy Transaction Forms will not change in appearance or function. Only the underlying posting of the transaction will differ, depending on the accounting method option selected.
- Policy Documents will not change in appearance or content when displayed in the Document Viewer.

b. Transaction Postings

If the **Accrual Basis** Direct Bill Accounting Method is selected, no change will be made to the current posting process.

If the **Cash Basis** Direct Bill Accounting Method is selected, the posting process is as follows, with indicated modifications to the current posting process:

- **Manually-Entered Transactions**

- Document List entry as usual
- Policy Transactions and Policy Details entry/update as usual
- GL Balance entries are limited to the entries for Producer Commissions, if any. The Producer Commissions hit the Commission Expense xref and the AP sub account for the relevant producer(s).
- AR and AR Detail entry for folder sub-account with zero amount, as usual
- No AR and AR Detail entry for policy commission receivable
- AP and AP Detail entries as usual for Producer Commission, if any

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- **Transacted Downloaded Transactions**
 - Update to Document List entry as usual
 - Policy Transactions and Policy Details updates as usual, in particular the entries indicating the transact status of the item
 - GL Balance entries are limited to the entries for Producer Commissions, if any. The Producer Commissions hit the Commission Expense xref and the AP sub account for the relevant producer(s).
 - AR and AR Detail entry for folder sub-account with zero amount, as usual
 - No AR and AR Detail entry for policy commission receivable
 - AP and AP Detail entries as usual for Producer Commission, if any

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4. Accounts Payable Payment Tools

We are pleased to announce that The Broker's Workstation (TBW) has recently been enhanced with AP Payment Tools to facilitate selection and reporting of qualifying transactions and the subsequent closing of the related open items. Users are able to create and save transaction selection parameters for current and future use. These parameters can be grouped for one-touch processing of the group; the groups of transactions selected for payment can then be transferred directly to a cheque or closed in a regular AP Reconciliation.

Use and operation of AP Payment Tools

AP Payment Tools are located in Accounts Payable. Double click Accounts Payable on the Accounting tree and click the Payment Tools tab in the Document Viewer. The enhanced toolbar will be at the top of the screen.

To create a payment, click the **New Pending Payment** icon. The system will present the following form (Figure 4.1) for the collection of the filtering criteria for the payment:

(Figure 4.1)

Note the following when completing the **Pending Payments** window:

- The **Use Existing** drop-down box contains a list of any saved criteria. When a list item is selected, the form will populate the parameter controls with the saved options.
- Although the default **Description** is “Pending Payment,” this can be overwritten by simply clicking and typing in the field.
- **Class** and **ID** selectors are used to define the organization for which the payment is targeted (e.g. Company [Class] and a particular insurance company [ID], or Producer and a particular producer within the organization).
- Use the **Date Range** fields to enter the “from” and “to” dates for the filtered transactions for payment. If these fields are left blank, no date filter will be applied.
- The radio buttons for **Effective Date**, **Entry/Transact Date**, and **Accounting Date** allow the user to select the particular type of transaction-date filter.
 - **Effective Date** is the insurance policy transaction effective date. In the case of an accounting document, it is the date of the accounting document.
 - **Entry/Transact Date** is, in the case of a manual transaction, the System Date on which the insurance policy transaction was entered or, in the case of an I-Biz or CSIO downloaded policy transaction, the date that the insurance policy transaction was transacted. In the case of an accounting document, it is the date of the accounting document.

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- **Accounting Date** is the date that a particular transaction affects the accounting system. In the case of an insurance policy transaction, the Accounting Date will be the later of the policy transaction effective date and the System Date of its manual entry or download transaction. In the case of an accounting transaction, the Accounting Date is the date of the cheque, receipt, or journal entry.
- The **Payer Code** text box allows the user to note information of use to the payment recipient, such as a broker number.
- The **Exclusions** list allows a user to exclude certain types of transactions from a Pending Payment (e.g. exclude cheques from a Pending Payment if within the date range but irrelevant to the particular payment).
- The **Shell Only, No Selections** check box allows a user to make a completely custom Pending Payment based on user selections of transactions. A Pending Payment with all available open transactions for the selected Class and ID will be opened, from which the user will select the items to be paid. This will enable the presentation of a suitable remittance report and a ready means of closing the open items.
- The **Save** button allows a user to save a Pending Payment template for future use. Once the template has been saved, a user can, for example, create a consistent Pending Payment from period to period without needing to re-enter the query criteria and the payer information.
- The **OK** button will cause the system to execute the Pending Payment.
- The **Cancel** button will exit the Pending Payment form without taking any other action.
- If a Pending Payment is run and no qualifying transactions are found, the system will still create a Pending Payment document. This \$0 document will serve to show that the process was in fact carried out for the subject account.

Multiple Pending Payments

The TBW Pending Payment design includes a means to execute a collection of Pending Payment templates with one command. For example, an organization may have pending payment templates developed for each of its insurance companies and producers. The Multiple Pending Payment will allow the user to group payments that would typically be run at the same time of the month and permit their execution with a common date range and one launch command. This will not only save time, but prevent any inadvertent omission of a particular component from the process.

Managing Pending Payments

Once a Pending Payment has been created, it will be visible in the viewer (Figure 4.2).

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(Figure 4.2)

| Accounts Payable Pending Payments | | | | | | | | | | |
|-----------------------------------|---------|-------|-----|--------------|----------------|-------------|----------|----------|------------|--------------------------|
| Number | Date | Class | ID | Description | Date Range | A-B-D | Rec. No. | Chq. No. | Amount | Shell Only |
| 3 | Apr 11, | C | AVI | Aviva Apr 07 | Apr 01, 2007 - | All-All-All | | | \$6,815.20 | <input type="checkbox"/> |
| 4 | Jun 30, | C | AVI | Aviva May 07 | May 01, 2007 - | All-All-All | | | \$5,442.37 | <input type="checkbox"/> |
| 5 | Jun 30, | C | ECD | Eco May 07 F | May 01, 2007 - | All-All-All | | | \$2,980.24 | <input type="checkbox"/> |

Note the following when working with the **Accounts Payable Pending Payments Viewer**:

- The viewer list shows the status of a pending payment and includes information such as the identification of the recipient; the date range of included items; Agency, Branch and Department inclusions for the transactions; and the total amount of included transactions.
- The **Number** is the reference number assigned to the Pending Payment
- The **Date** is the creation date of the Pending Payment
- The **Rec. No.** column will indicate the AP Reconciliation to which the Pending Payment was eventually closed, if any.
- **Shell Only** shows the Pending Payment to be a manually created payment, rather than a rules-based payment.
- A Pending Payment in the list may be deleted (subject to data integrity rules and User Rights). For example, if errors or omissions were discovered in a Pending Payment, the payment can be deleted and recreated once the errors and omissions are rectified.
- Double click a list item to see detailed contents about the Pending Payment. If the Pending Payment is not closed to an AP Reconciliation, it may be edited by the de-selection of any of the included transaction items or the selection of any previously unselected items. The Amount on the Pending Payment form will increase or decrease accordingly as items are selected or deselected. Click OK to save the updated Pending Payment.

Printed Output

A Pending Payments report suitable for forwarding to the payee can be printed. The report header includes the brokerage name, transactions details, payee code information, and a user description. The body of the report includes a list of transactions and sufficient transaction detail for the reader.

A Pending Payments report intended for a Producer includes information regarding the policy commission, as well as the percentage and amount of the Producer's portion, allowing for a quick accuracy check of the Producer commission rates applied to that Producer's transactions.

Pending Payment printed output may be persisted to a PDF document by clicking the Persist button when viewing the Pending Payment details.

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Completing the Cycle – Making the Payment and Closing Open Items

The TBW Pending Payment design also has the ability to create the AP cheque to the account represented by the Pending Payment (subject to cheque-creation User Rights). The actual cheque to settle a Pending Payment can be made using the regular GL Cheque tools based on the contents and total of a Pending Payment.

To close the AP open items stemming from the AP cheque and those of the transactions included in the Pending Payment, create an AP Reconciliation with the AP Cheque as the target, and select the appropriate Pending Payment as the allocation. This should balance the Reconciliation and permit the user to commit it. At this point, the cycle is complete, and all related open items have been closed. While it is not necessary to close the open items, doing so will keep the organization's AP Report tidy and meaningful.

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5. Accounts Payable Payment Item Selection Tools

TBW Users have requested improved capabilities for paying their insurance companies based on system data, rather than in response to a company statement. We are pleased to announce an enhancement to TBW that adds capabilities to the existing AP Accumulator and allows for more effective and efficient payment of insurance companies based on data from the User's system. This enhancement includes tools to quickly select individual transactions for payment based on user-defined rules, while providing a suitable printed report to accompany the cheque. The ability to readily close selected AP open items with the resulting payment is also part of this enhancement.

Accounts Payable Payment Tools

The tools for managing the determination of payments are on the Payment Tools tab in the Accounts Payable viewer. Double click Accounts Payable on the Accounting tree and click the Payment Tools tab in the Document Viewer.

On the AP Pending Payments screen, you will see the enhanced toolbar with the following new icons:

1. **New Pending Payment** – Opens the **Pending Payments** window (Figure 5.1) to create a new Pending Payment or run a new instance of a saved Pending Payment rule. See more information below.
2. **Multiple New Pending Payments** – Opens the **Pending Payments (Multiple)** window (Figure 5.2) to permit the selection of a saved multiple Pending Payment rule to execute at one time, or to run a new instance of a saved multiple Pending Payment group. See more information below.
3. **Apply Filter** – Opens the **Pending Payments Filter** window (Figure 5.3) to allow filtering of the list of Pending Payments as per user-selected criteria. See more information below.
4. **Remove Filter** – removes a filter so complete list contents are displayed

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5. **Delete Pending Payment** – deletes the selected Pending Payment from the viewer
6. **Direct to Cheque...** – starts the process to create a cheque to pay the selected Pending Payment via a cheque, and then close the open items

1. **New Pending Payments**

To create a payment, click the **New Pending Payment** icon. The system will present the following form (Figure 5.1) for the collection of the filtering criteria for the payment:

(Figure 5.1)

Note the following when completing the **Pending Payments** window:

- The **Use Existing** drop-down box contains a list of any saved criteria. When a list item is selected, the form will populate the parameter controls with the saved options.
- Although the default **Description** is “Pending Payment,” this can be overwritten by simply clicking and typing in the field.
- **Class** and **ID** selectors are used to define the organization for which the payment is targeted (e.g. Company [Class] and a particular insurance company [ID], or Producer and a particular producer within the organization).

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- Use the **Date Range** fields to enter the “from” and “to” dates for the filtered transactions for payment. If these fields are left blank, no date filter will be applied.
- The radio buttons for **Effective Date**, **Entry/Transact Date**, and **Accounting Date** allow the user to select the particular type of transaction-date filter.
 - **Effective Date** is the insurance policy transaction effective date. In the case of an accounting document, it is the date of the accounting document.
 - **Entry/Transact Date** is, in the case of a manual transaction, the System Date on which the insurance policy transaction was entered or, in the case of an I-Biz or CSIO downloaded policy transaction, the date that the insurance policy transaction was transacted. In the case of an accounting document, it is the date of the accounting document.
 - **Accounting Date** is the date that a particular transaction affects the accounting system. In the case of an insurance policy transaction, the Accounting Date will be the later of the policy transaction effective date and the System Date of its manual entry or download transaction. In the case of an accounting transaction, the Accounting Date is the date of the cheque, receipt, or journal entry.
- The **Payer Reference** text box allows the user to note information of use to the payment recipient, such as a broker number.
- The **Exclusions** list allows a user to exclude certain types of transactions from a Pending Payment (e.g. exclude cheques from a Pending Payment if within the date range but irrelevant to the particular payment).
- The **Shell Only, No Selections** check box allows a user to make a completely custom Pending Payment based on user selections of transactions. A Pending Payment with all available open transactions for the selected Class and ID will be opened, from which the user will select the items to be paid. This will enable the presentation of a suitable remittance report and a ready means of closing the open items.
- The **Save** button allows a user to save a Pending Payment template for future use. Once the template has been saved, a user can, for example, create a consistent Pending Payment from period to period without needing to re-enter the query criteria and the payer information.
- The **OK** button will cause the system to execute the Pending Payment.
- The **Cancel** button will exit the Pending Payment form without taking any other action.
- If a Pending Payment is run and no qualifying transactions are found, the system will still create a Pending Payment document. This \$0 document will serve to show that the process was in fact carried out for the subject account.

2. Multiple Pending Payments

Click the **Multiple Pending Payments** icon to open a form to set up the parameters for the running of multiple saved Pending Payments and/or to save a Multiple Pending Payment run for future use. The system will present the following window (Figure 5.2):

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(Figure 5.2)

Note the following when completing the **Pending Payments (Multiple)** window:

- The **Use Existing:** drop-down menu will contain a list of any saved multiples. When a saved multiple is selected, the form will populate the parameter controls with the saved options.
- Although the default **Description** is “Pending Payment,” this can be overwritten by simply clicking and typing in the field.
- Use the **Date Range** fields to enter the “from” and “to” dates for the query, which will be passed to each individual Pending Payment included in the run. If these fields are left blank, no date filter will be applied.
- The **Save** button allows a user to save a Multiple Pending Payments template for future use.
- The **OK** button will cause the system to execute the Multiple Pending Payment.
- The **Cancel** button will exit the Multiple Pending Payment form without taking any other action.

3. Filter Pending Payments

Click the **Apply Filter** icon to filter the list of Pending Payments in the viewer to find one or more specific items. The system will present the following form (Figure 5.3):

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(Figure 5.3)

Note the following when completing the **Pending Payments Filter** window:

- **Class** and **ID** selectors are used to define the organization for which the payment is targeted (e.g. Company [Class] and a particular insurance company [ID], or Producer and a particular producer within the organization).
- Use the **Date Range** fields to enter the “from” and “to” dates for the filtered transactions for payment. If these fields are left blank, no date filter will be applied.
- **Rec. Number** is the document number of the AP Reconciliation to which the Pending Payment is closed.
- **Status** can be Open, Closed, or All.
- The **OK** button will cause the system to execute the filter.
- The **Cancel** button will exit the Pending Payments Filter window without taking any other action.

Managing Pending Payments

Once a Pending Payment has been created, it will be visible in the viewer in the list of Accounts Payable Pending Payments documents (Figure 5.4).

(Figure 5.4)

| Number | Date | Class | ID | Description | Date Range | A-B-D | Rec. No. | Chq. No. | Amount | Shell Only |
|--------|---------|-------|-----|--------------|----------------|-------------|----------|----------|------------|--------------------------|
| 3 | Apr 11, | C | AVI | Aviva Apr 07 | Apr 01, 2007 - | All-All-All | | | \$6,815.20 | <input type="checkbox"/> |
| 4 | Jun 30, | C | AVI | Aviva May 07 | May 01, 2007 - | All-All-All | | | \$5,442.37 | <input type="checkbox"/> |
| 5 | Jun 30, | C | ECD | Eco May 07 F | May 01, 2007 - | All-All-All | | | \$2,980.24 | <input type="checkbox"/> |

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Note the following when working with the **Accounts Payable Pending Payments Viewer**:

- The viewer list shows the status of a pending payment and includes information such as the identification of the recipient; the date range of included items; Agency, Branch, and Department inclusions of the transactions; and the total amount of included transactions.
- The **Number** is the reference number assigned to the Pending Payment
- The **Date** is the creation date of the Pending Payment
- The **Rec. No.** column will indicate the AP Reconciliation to which the Pending Payment was eventually closed, if any.
- **Shell Only** shows the Pending Payment to be a manually created payment, rather than a rules-based payment.
- A Pending Payment in the list may be deleted (subject to data integrity rules and User Rights). For example, if errors or omissions were discovered in a pending payment, the payment can be deleted and recreated once the errors and omissions are rectified.
- Double click a list item to see detailed contents about the Pending Payment. If the Pending Payment is not closed to an AP Reconciliation, it may be edited by the de-selection of any of the included transaction items or the selection of any previously unselected items. The Amount on the Pending Payment form will increase or decrease accordingly as items are selected or deselected. Click OK to save the updated Pending Payment.

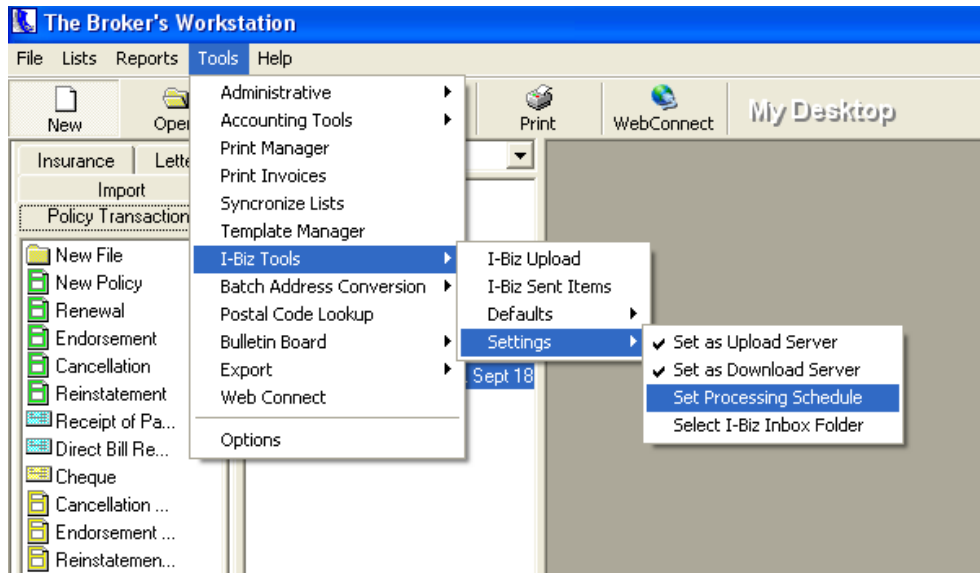
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6. I-Biz Automatic Processing

I-Biz Automatic Processing is now available to all users. This function must be set up on the download machine.

To enable this function, go to Tools – I-Biz Tools – Settings – Set Processing Schedule (Figure 6.1).

(Figure 6.1)



The following screen will appear. The user must select at least 5 days and at least one of the scheduling options (Figure 6.2).

(Figure 6.2)

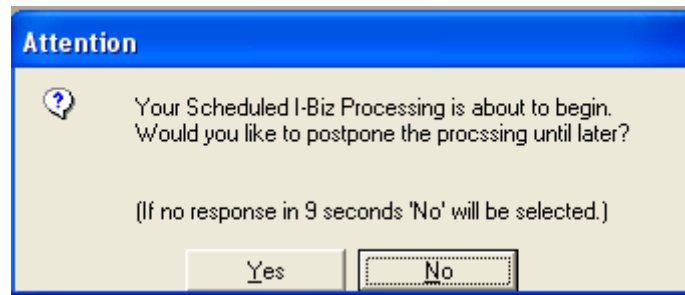


TBW must be running for the automatic I-Biz processing to begin as scheduled.

A timer message box will pop up, giving the user the chance to postpone the processing, if necessary, at that time. If no one is at that machine, the message box will disappear after 10 seconds, and processing will begin (Figure 6.3).

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(Figure 6.3)



Mail will be downloaded, and the normal I-Biz processing screen will load. If there are items to process that are 85% or greater, they will process automatically. When all items are processed, the form will close, and a printout summary will be sent straight to the printer, even if Print Preview is enabled. If there are no items to process, the form simply closes and nothing is sent to the printer.

If TBW is busy (i.e. any forms are loaded, reports are running, etc.), the processing will not be able to start. If any errors occur during processing, the processing will be interrupted until a user can clear the message box. TBW will check every 30 seconds to see if it's time to run I-Biz.

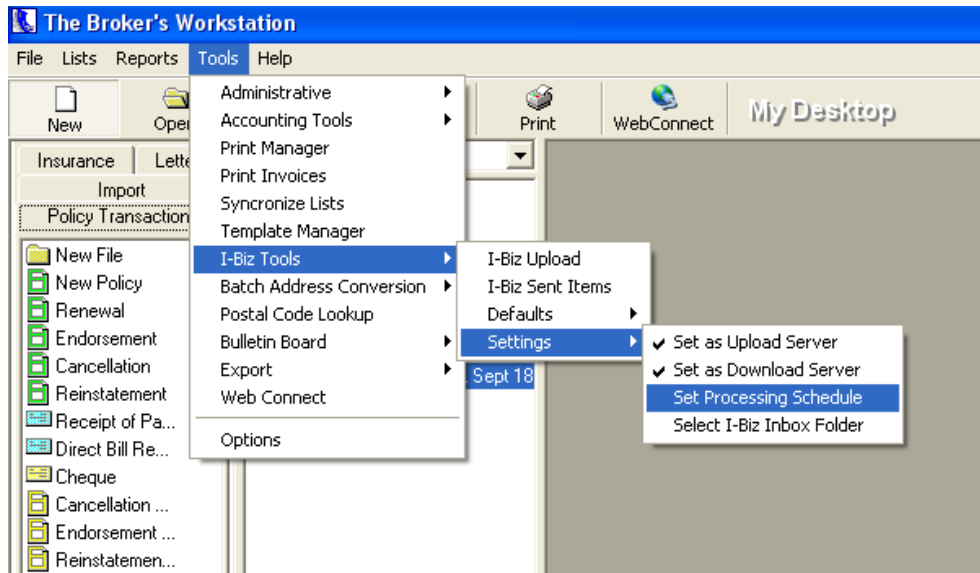
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7. CSIO Automatic Processing

CSIO Automatic Processing is now available to all users. This function must be set up on the download machine.

To enable this function, go to Tools – I-Biz Tools – Settings – Set Processing Schedule (Figure 7.1).

(Figure 7.1)



The following screen will appear. The user must select at least 5 days and at least one of the scheduling options (Figure 7.2).

(Figure 7.2)

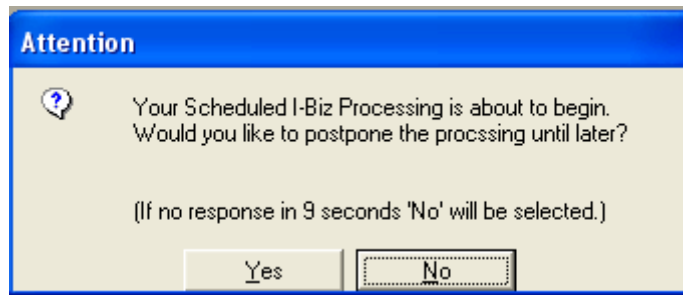


TBW must be running for the automatic CSIO processing to begin as scheduled.

A timer message box will pop up, giving the user the chance to postpone the processing, if necessary, at that time. If no one is at that machine, the message box will disappear after 10 seconds, and processing will begin (Figure 7.3).

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(Figure 7.3)



Mail will be downloaded, and the normal CSIO processing screen will load. If there are items to process that are 85% or greater, they will process automatically. When all items are processed, the form will close and a printout summary will be sent straight to the printer, even if Print Preview is enabled. If there are no items to process, the form simply closes and nothing is sent to the printer.

If TBW is busy (i.e. any forms are loaded, reports are running, etc.), the processing will not be able to start. If any errors occur during processing, the processing will be interrupted until a user can clear the message box. TBW will check every 30 seconds to see if it's time to run CSIO.

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Please share this information with all TBW users in your office(s). Please contact us for assistance in using or with any questions about these enhancements and features at 1-888-291-3588 (toll-free telephone).

Thank you for using TBW.

Yours sincerely,

Custom Software Solutions Inc.

