



7 May 2009

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)**:

Contents

1. [List Item Folders](#) – Use List Item Folders to organize and manage correspondence and documents for Insurance Companies, Employees, Vendors, and other TBW List items.
2. [Folder Groups](#) – TBW users can organize any particular set of client folders into higher-level “Folder Groups” and gain increased functionality across the group and improved management amongst the client folders in the group, as well.

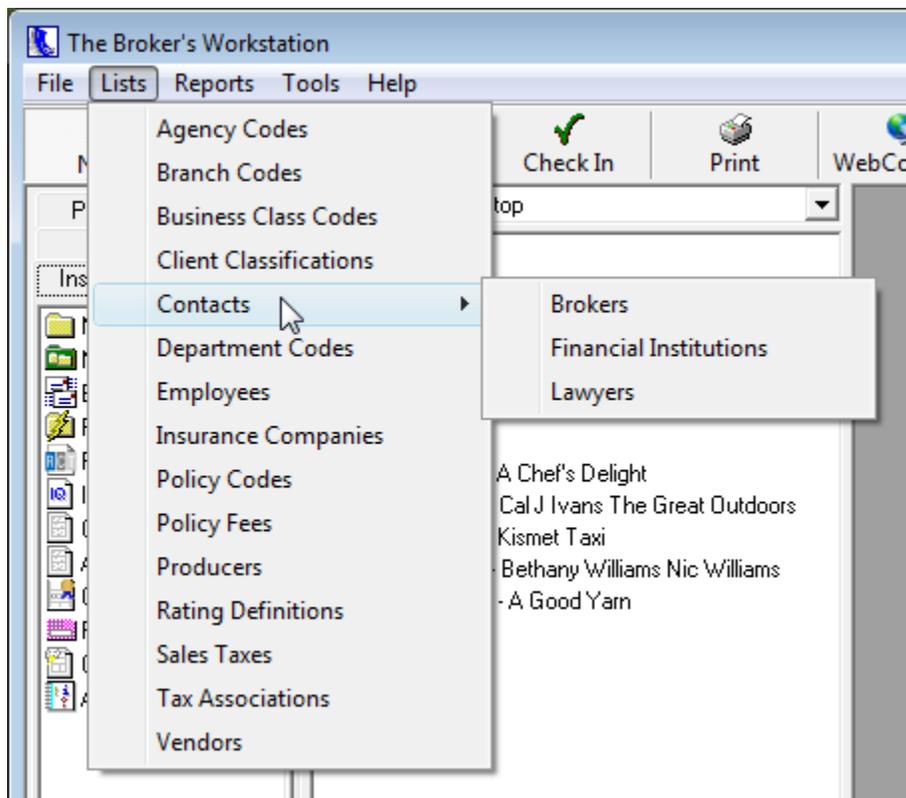
1. List Item Folders

We are pleased to announce the development of an Application enhancement that allows TBW users to create and use folders to organize documents, email messages, correspondence, and images pertaining to Insurance Companies, Employees, Vendors, Producers, and other contacts and associates.

The TBW user utilizes the “**Lists**” feature to enter and manage information about numerous “**List Items**,” including Insurance Companies, Producers, Financial Institutions, Lawyers, and other individuals

and companies important to the Brokerage. List items are entered through the **Lists Menu** (see Figure 1.1).

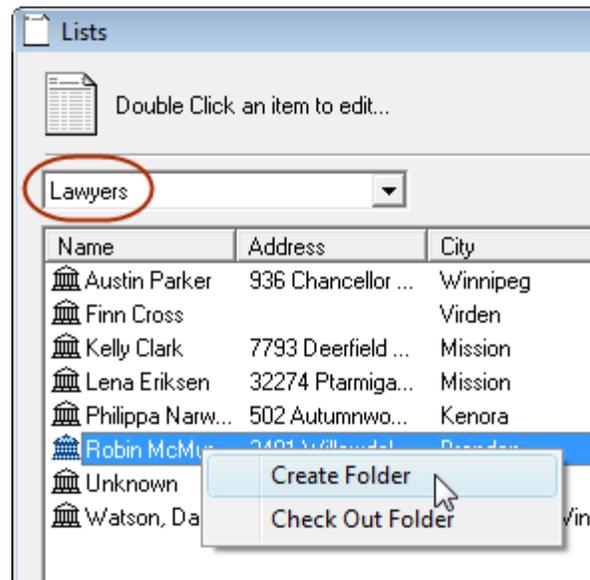
(Figure 1.1)



With the new “**List Item Folders**” feature, the TBW user can create an individual folder for any List item – a folder can be created for a particular Insurance Company, a Lawyer, a Financial Institution, or any other List item. The created folder will store all documents and correspondence pertaining to that individual or company.

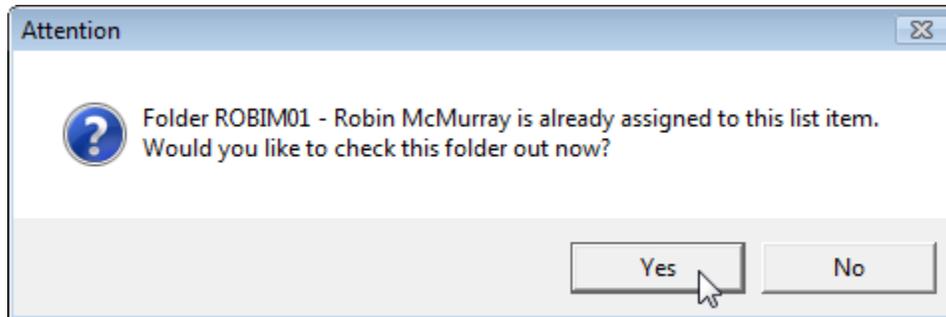
To create a folder for a particular List item, use the **Lists Menu** to open the relevant **Lists dialogue box** (for example, click **Lists, Contacts, Lawyers** to open the **Lists dialogue box** and create a folder for a particular lawyer). Next, find and right click the target individual or company, and then click **Create Folder** in the shortcut menu (see Figure 1.2).

(Figure 1.2)



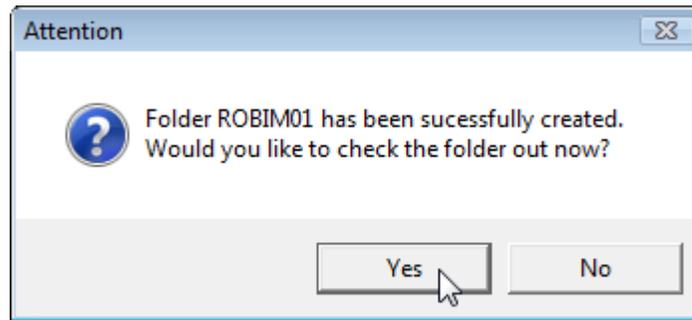
If a folder already exists for the item, a prompt will appear to tell you so and to ask if you would like to check out the existing folder (see Figure 1.3).

(Figure 1.3)



If no folder exists for the selected item, a new folder will be created immediately, and you will be asked if you would like to check out the newly created folder (see Figure 1.4). Repeat these steps if you would like to create additional folders for other List items.

(Figure 1.4)



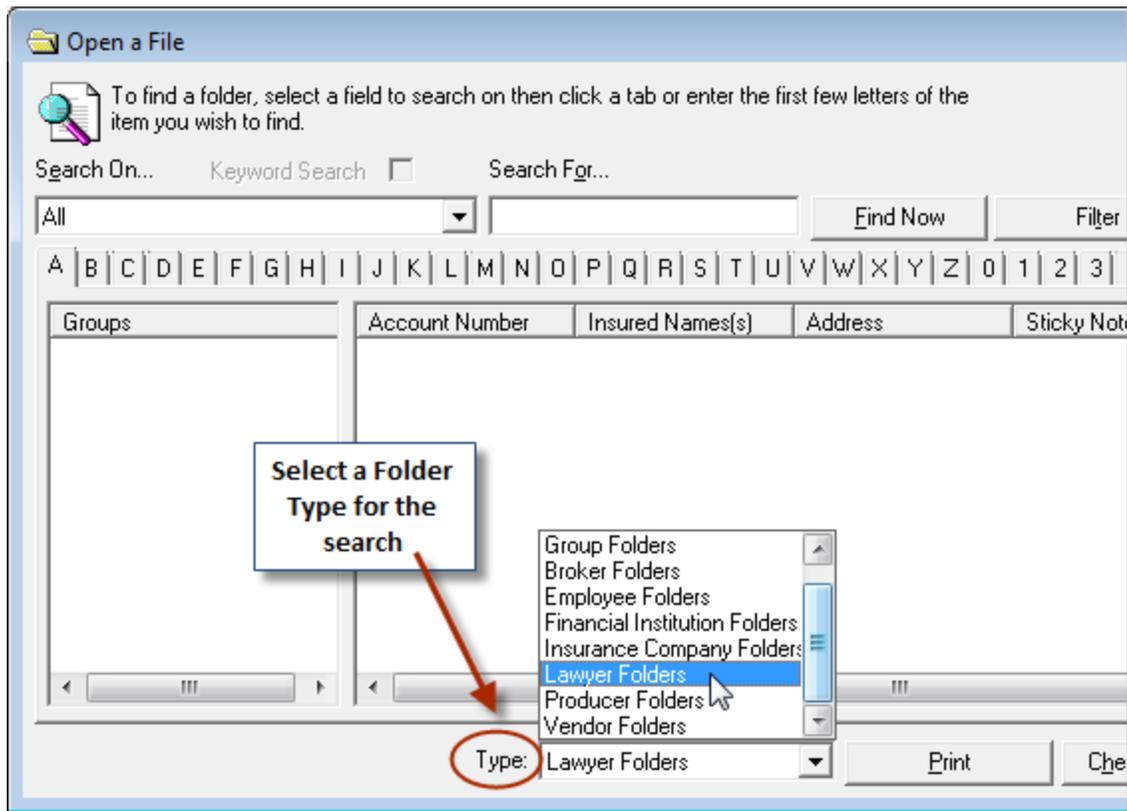
Once a List Item Folder has been created for an individual or company, the folder can be checked out at any time through the **Lists dialogue box** by right clicking the item and then selecting **Check Out Folder** in the shortcut menu (see Figure 1.2). If the item has no corresponding folder, the following **Attention** prompt will appear (see Figure 1.5):

(Figure 1.5)



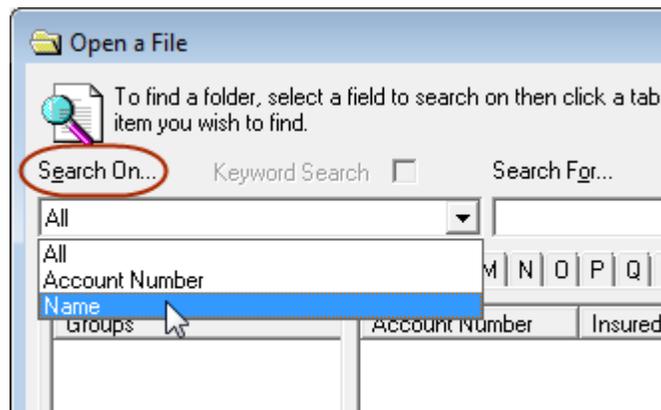
A List Item Folder can also be checked out through the **File Cabinet**, in the same way the user would check out a client folder. With this enhancement, the user can now narrow a File Cabinet search according to **Folder Type** (see Figure 1.6), as well as by other search filters.

(Figure 1.6)



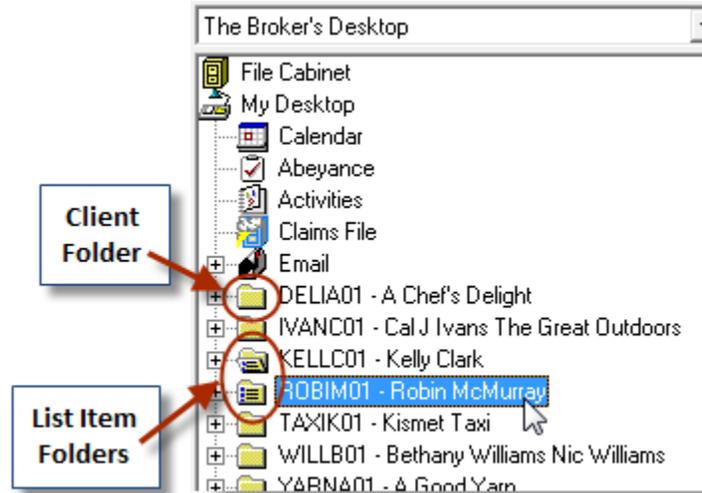
When searching for a particular List Item Folder in the **Open a File window**, the user can choose to search for **All** relevant folders, to search by **Account Number**, or to search by **Name** in the **Search On field** (see Figure 1.7).

(Figure 1.7)



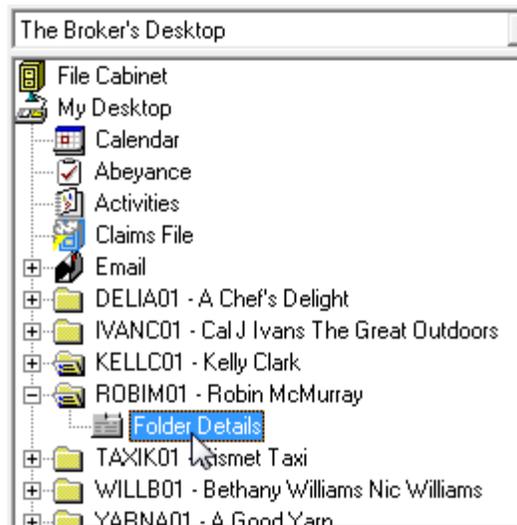
When a List Item Folder has been checked out of the File Cabinet and is in the **Document Tree**, it is visually distinguishable from client folders by its unique folder icon (see Figure 1.8).

(Figure 1.8)

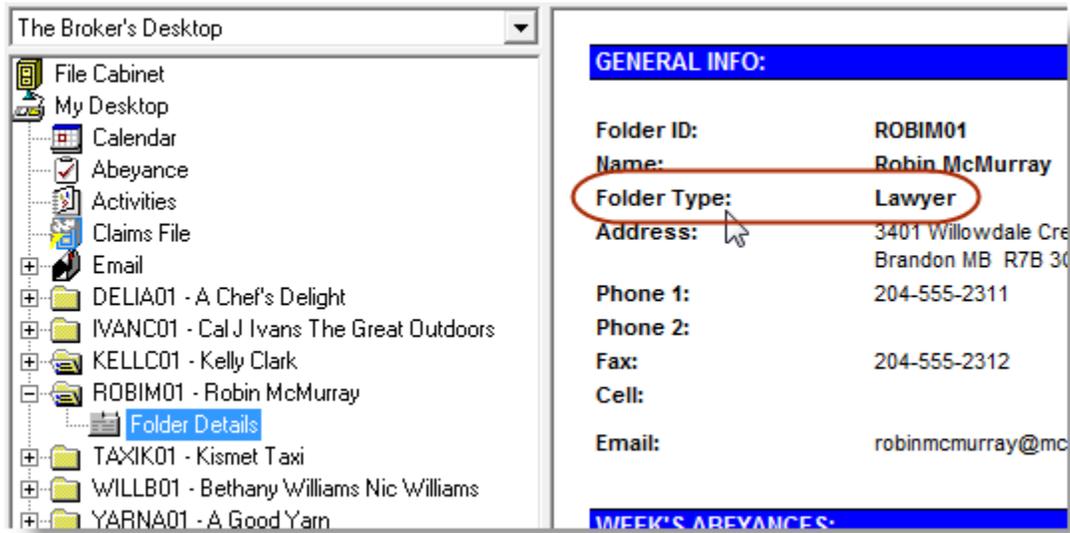


Click **Folder Details** in the **Document Tree** (see Figure 1.9) to view the folder's **General Information** and **Week's Abeyances** in the **Document Window**. Note that the **Folder Type** is clearly indicated in the folder information (see Figure 1.10).

(Figure 1.9)

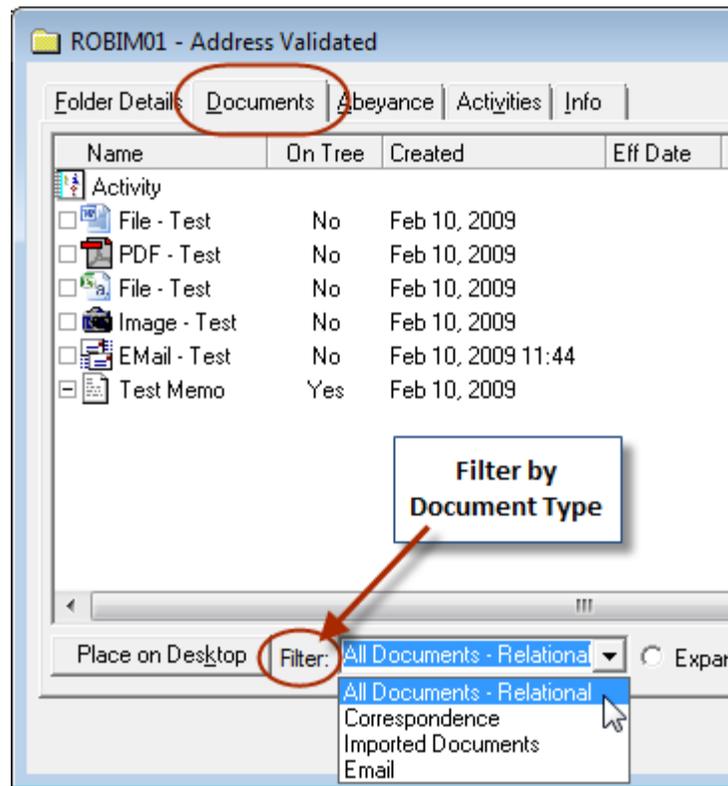


(Figure 1.10)



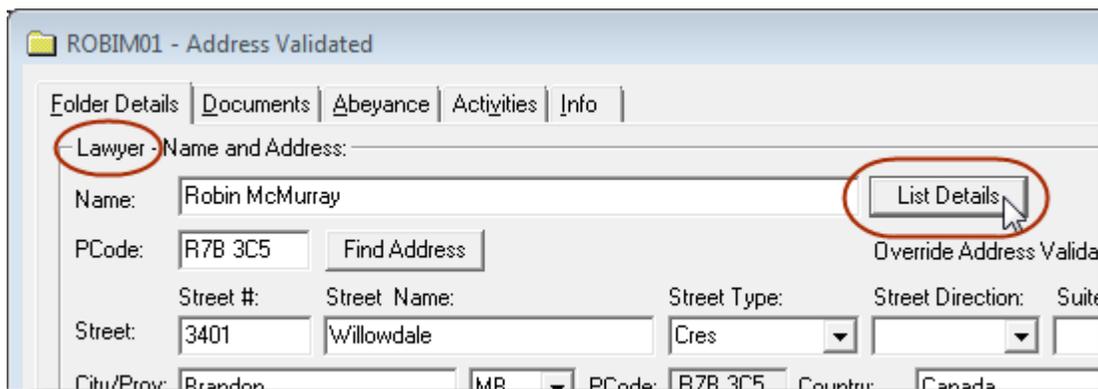
Once the folder has been created for the individual or company, the user can store and manage all email messages, word processing documents, file attachments, PDF documents, images, and other documents pertaining to that particular individual or company in the new folder. To view the contents of a List Item Folder, check out the folder and then double click its **Folder Details** in the **Document Tree** (see Figure 1.9). Click the **Documents** tab in the **Folder Details** dialogue box to view, filter, and access all documents and correspondence attached to that folder (see Figure 1.11).

(Figure 1.11)



The **Folder Details** tab in the Folder Details window provides an overview of the List Item Folder. Note that the List type is identified at the top of the window (see Figure 1.12). Click the **List Details** button to open the **List Item** window (see Figure 1.13) and view additional folder details.

(Figure 1.12)



(Figure 1.13)

The Folder ID can be changed on the **Info tab** in the **Folder Details window**. Click the **Edit ID button** (see Figure 1.14), and then either accept the suggested account number or enter a new account number of your choosing in the **Account Number dialogue box** (see Figure 1.15). Note that the program will prompt you if you happen to choose an account number already in use.

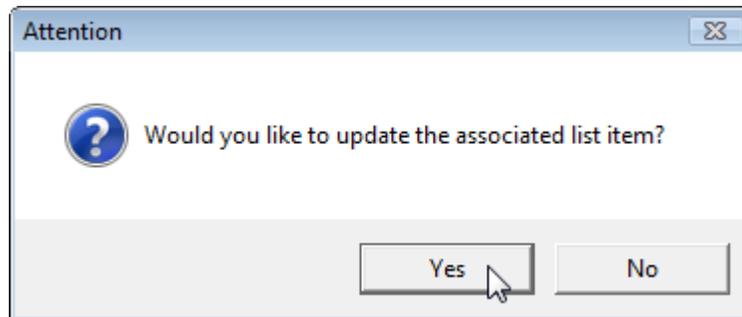
(Figure 1.14)

(Figure 1.15)

Information that is shared between the List Item Folder and the actual List Item (such as name, address, telephone number, etc.) is connected, and a change to one can be reflected automatically in the other. For example, if the user makes a change to the address while working in the List Item Folder window

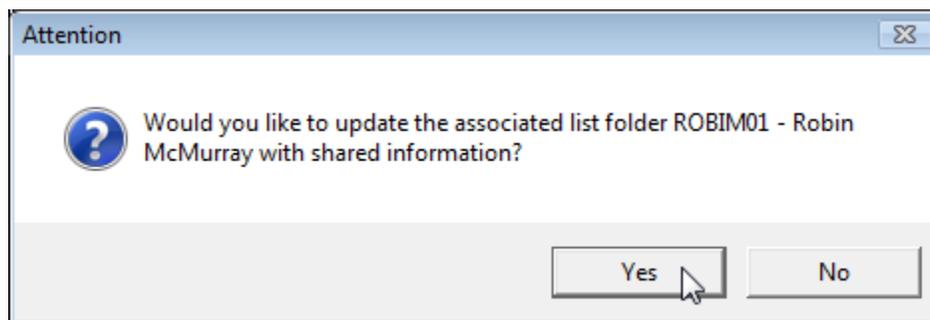
and then clicks **OK**, a prompt will appear to ask the user if the associated List Item should be changed, as well (see Figure 1.16).

(Figure 1.16)



Likewise, if the user makes a change to any shared data in the List Item window, the corresponding List Item folder can be updated automatically, *as long as the folder is currently checked into the File Cabinet*. Once the changes are made to the List Item, a prompt will appear, asking whether the corresponding information in the List Item Folder should be revised, as well (see Figure 1.17).

(Figure 1.17)



The current User Rights for **Lists** assigned to a particular user (through **Tools, Administrative, User Manager**) will determine that user's access to the List Item Folders feature.

Please note that this feature is available only on the SQL database platform.

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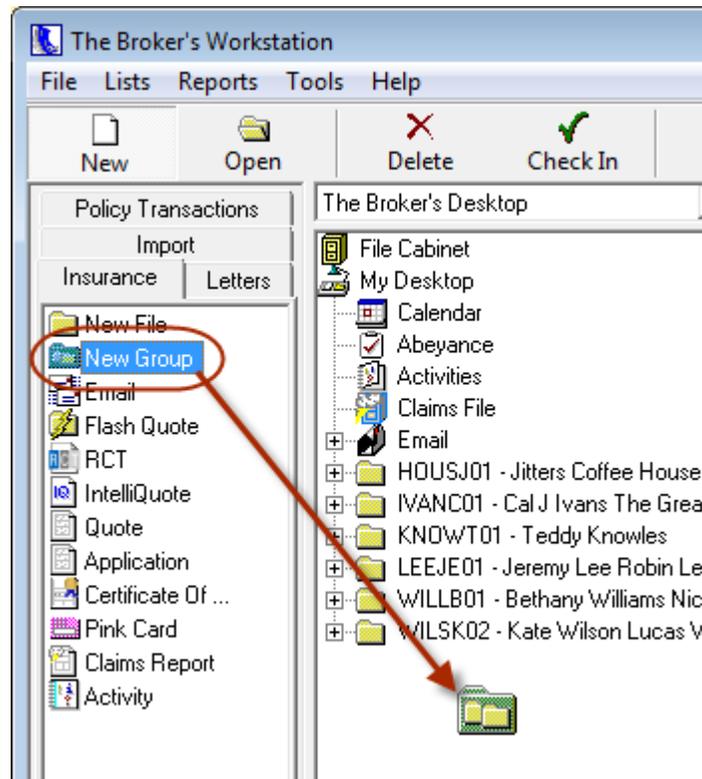
2. Folder Groups

We are pleased to announce an enhancement to **The Broker's Workstation** that allows users to organize client folders into higher-level "Folder Groups." The user can combine any particular set of client folders (such as all folders for a particular family or business) into a Folder Group, based on the

user's individual preferences and criteria. A Folder Group will provide the user with increased functionality across the group and improved management amongst the client folders in the group, as well.

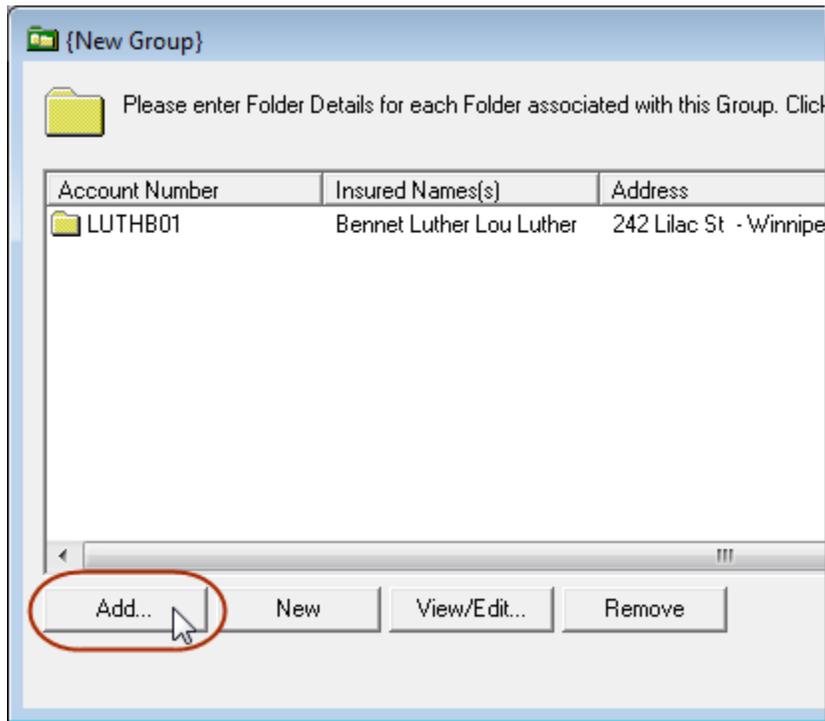
Creating a Folder Group is very similar to creating a client folder. To create a Folder Group, simply drag and drop the **New Group** icon from the **Insurance Tray** onto the **Desktop Tree** (see Figure 2.1).

(Figure 2.1)



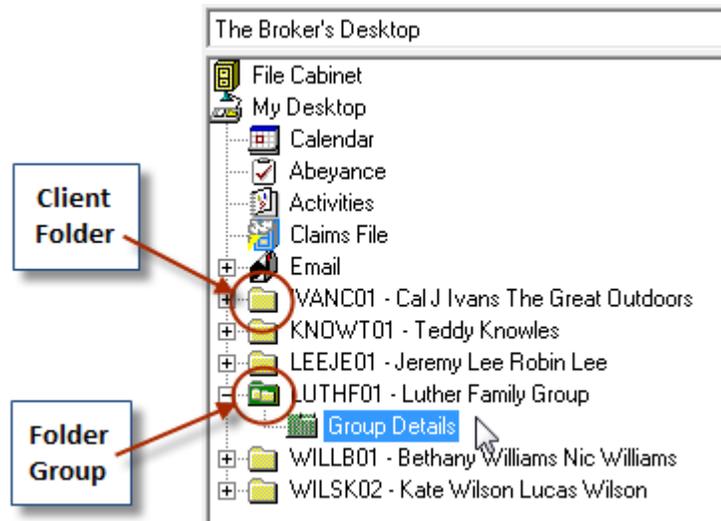
The **New Group Wizard** will appear to help you enter the required information about the new group. To add client folders to this Folder Group, click the **Add** button in Step 2 of the Wizard (see Figure 2.2). The **Open a File** window will open to assist you in selecting the client folders to add to this Folder Group.

(Figure 2.2)



Once you have completed the Wizard and assigned an Account Number to the new Group Folder, the newly created Folder will appear in the **Desktop Tree**. A Folder Group is visually distinguishable from client folders in the Tree by its unique “folder-in-folder” icon (see Figure 2.3).

(Figure 2.3)



Click once on **Group Details** in the Desktop Tree (see Figure 2.3) to view the new folder's **Group Information** in the **Document Window**, with colour coding in green that distinguishes it from a client folder's information (which has dark red headings). Note that all **Folders** associated with the Group Folder, as well as the **Week's Abeyances** for the Group Folder, are clearly shown in the folder information (see Figure 2.4).

(Figure 2.4)

The Broker's Desktop

File Cabinet
My Desktop
Calendar
Abeyance
Activities
Claims File
Email
IVANC01 - Cal J Ivans The Great Ou
KNOWT01 - Teddy Knowles
LEEJE01 - Jeremy Lee Robin Lee
LUTHF01 - Luther Family Group
Group Details
WILLB01 - Bethany Williams Nic Will
WILSK02 - Kate Wilson Lucas Wilso

GROUP INFO:

Group ID: LUTHF01
Name: Luther Family Group
Status: Active
Balance Owing: N/A
Address: 242 Lilac St
Winnipeg MB R3M 2T3
Phone: 204-555-9012
Fax: 204-555-9012
Cell:
Email: lutherfamily@jitterscoffee.com

FOLDERS:

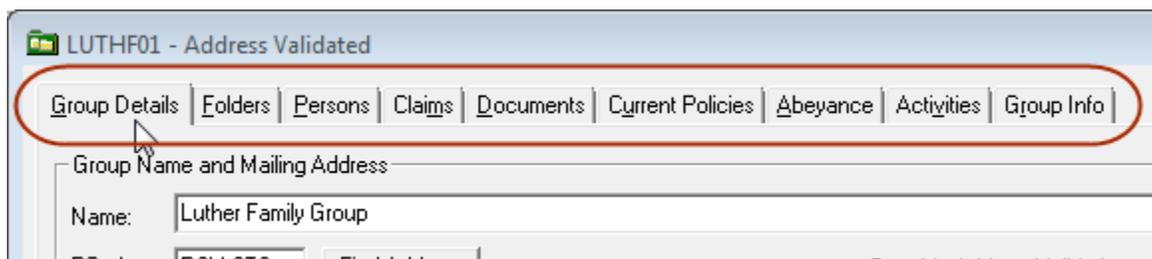
Client ID	Name
HOUSJ01	Jitters Coffee House
LUTHB01	Bennet Luther Lou Luther
LUTHC01	Carrie Luther
LYNLJ01	James Lynley Anna Luther Lynley

WEEK'S ABEYANCES:

Client ID	Abeyance Date	Date Closed
< No Abeyances >		

Once the Group Folder has been created for the set of client folders, the user can oversee all data and documents for all client folders in this group from the Group Folder. To view the contents of a particular Group Folder, check out the Group Folder (if it's not already in the Document Tree), and then double-click its **Group Details** in the Document Tree (see Figure 2.3). The Group Details window will open, providing the user with access to all Folders, Persons, Claims, Documents, etc., associated with this Group via the tabs across the top of the window (see Figure 2.5).

(Figure 2.5)



Note that working with a client folder within/through the Group Folder is the very same as working directly with the client folder itself, so all folder activity and modifications will update the actual client folder.

Group Folder Tabs

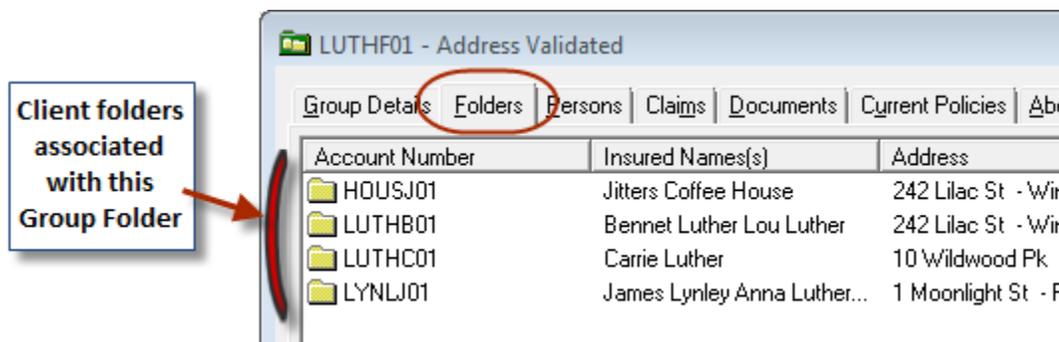
Group Details Tab

The **Group Details tab** stores contact information relevant to the group as a whole.

Folders Tab

The **Folders tab** lists each client folder in this group (see Figure 2.6) and allows the user to manage this group's client folders.

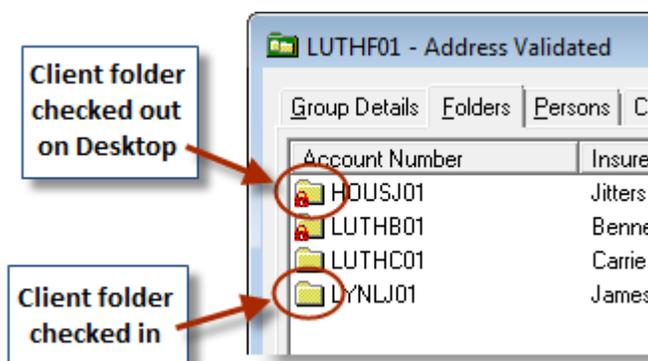
(Figure 2.6)



- Click the **Add button** to add an existing client folder to the Group Folder.
 - The **Open a File window** will open to assist you in finding the client folder to add.
- Click the **New button** to create an entirely new client folder to add to the Group Folder.

- Select a client folder, and then click the **View/Edit button** to open the Folder Details window for that client folder.
 - Client folder information can be edited from the Folder Details window.
 - Choosing to View/Edit the client folder will also check out the client folder and move it to the Desktop Tree.
 - A client folder that is checked out will be indicated on the Folders tab with a “locked” icon (see Figure 2.7).

(Figure 2.7)



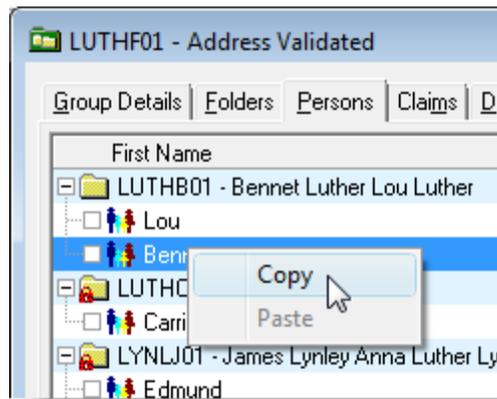
- Select a client folder and then click the **Remove button** to remove that folder from the Folder Group.
 - Note that removing a client folder from the Group Folder will not delete the client folder from TBW, but merely remove it from this particular group.

Persons Tab

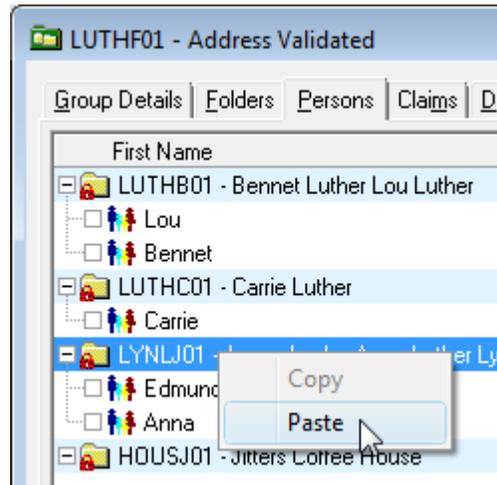
The **Persons** tab lists all individuals associated with this Group Folder, organized alphabetically by client folder. The user can add, view, edit, or remove a person in any client folder from this window.

- Select a client folder and then click the **Add button** to add a person to that particular folder.
 - The **Personal Details Wizard** will open to help you enter the required information.
- Click a person and then click the **View/Edit button** to open the **Personal Details window** and view or edit details about this person.
- Click a person and then click the **Delete button** to remove that person from that particular client folder.
- To copy a person from one folder to another, simply right-click the target person and click **Copy** in the shortcut menu (see Figure 2.8). Then, right-click the target folder and click **Paste** (see Figure 2.9).

(Figure 2.8)

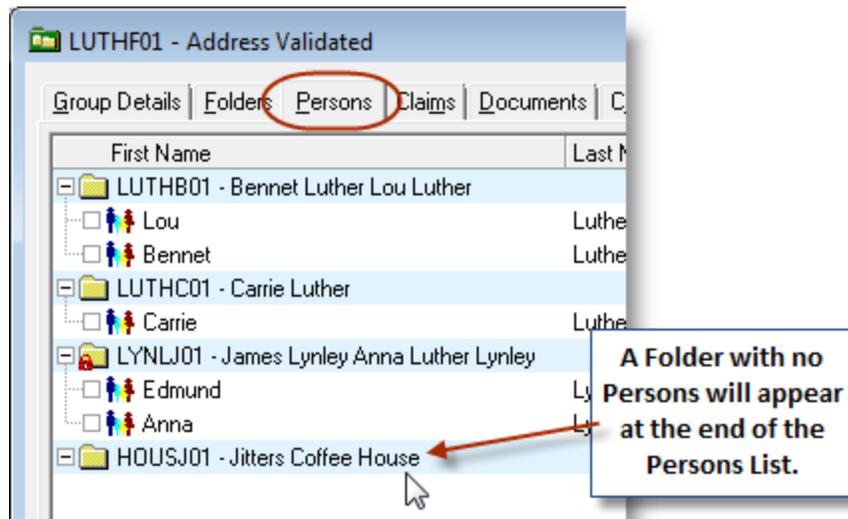


(Figure 2.9)



- Note that any client folder without a person listed will appear at the bottom of the list of client folders (see Figure 2.10).

(Figure 2.10)

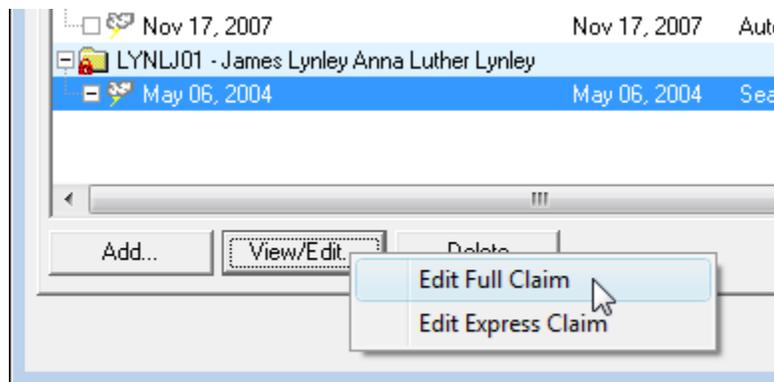


Claims Tab

The **Claims tab** lists all claims linked to the Group Folder, sorted by client folder.

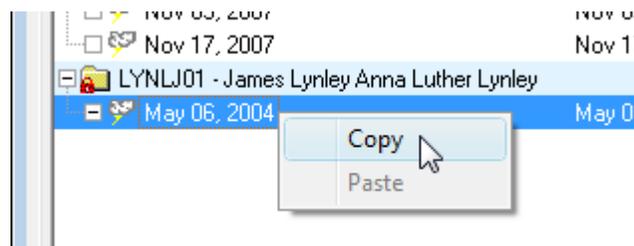
- Click a client folder and then click the **Add button** to add a Full or Express Claim to that particular client folder.
- Click a claim and then click the **View/Edit button** to open the Claims Report for that claim.
 - Select to open details either for the Full Claim or the Express Claim (see Figure 2.11).

(Figure 2.11)

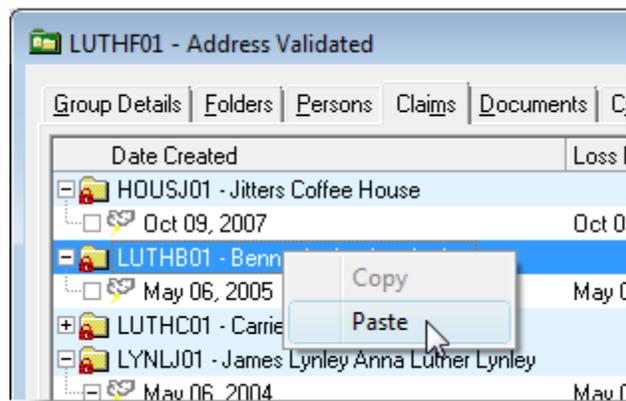


- The user can also copy a claim to another client folder in the group as follows: Right-click the claim and click **Copy** in the menu (see Figure 2.12). Then, right-click the target client folder and click **Paste** (see Figure 2.13).

(Figure 2.12)



(Figure 2.13)

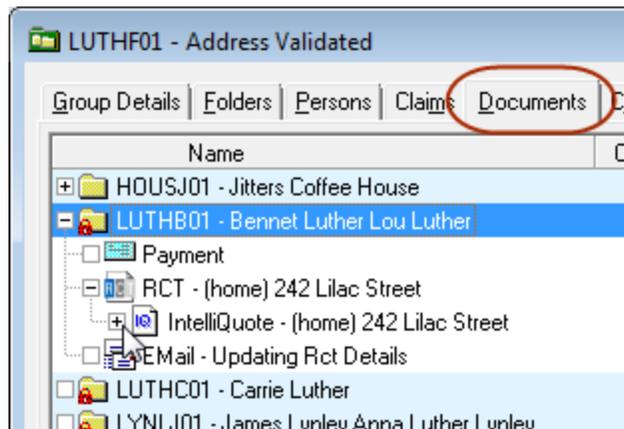


Documents Tab

The **Documents tab** provides the TBW user with access to all documents for each client folder in the particular Folder Group.

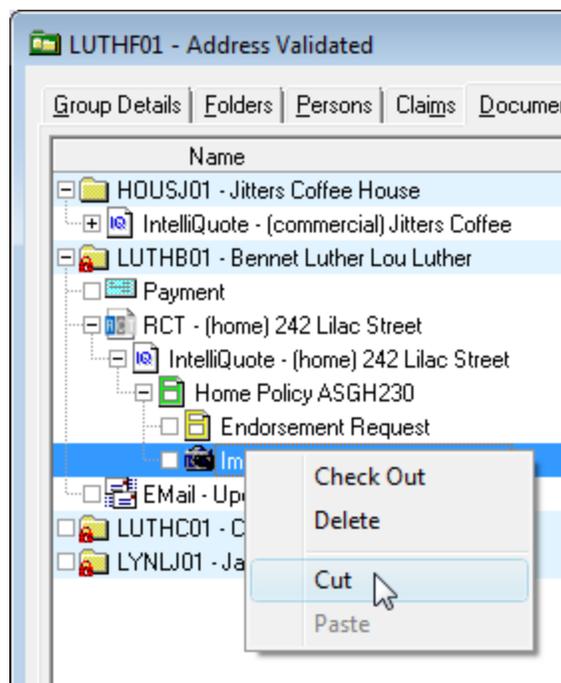
- Click the **plus (+) sign** beside a client folder to expand its **Document List**.
 - Clicking a plus sign beside a specific document will expand that Document Tree, as well (see Figure 2.14).

(Figure 2.14)



- Right-click a document to open the shortcut menu to check out or delete the document, or to cut the document and paste it to another folder in the group (see Figure 2.15).

(Figure 2.15)



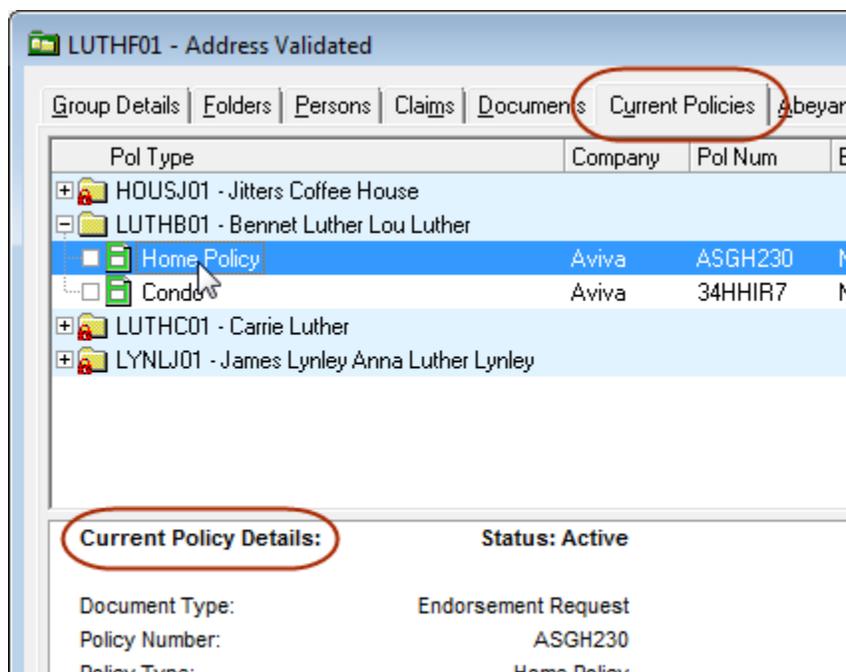
- Note that **Policy Transfers** can be accomplished with the cut / paste feature, as well.

Current Policies Tab

The **Current Policies tab** lists existing policies for each client folder.

- Click the **plus (+) sign** beside a client folder to expand the list of current policies.
- Click a specific policy to view its **Policy Details** in the lower pane of the window (see Figure 2.16).
- Double-click a specific policy to check out the policy and view it in the Document Window.
 - This action will close the Group Details window.

(Figure 2.16)

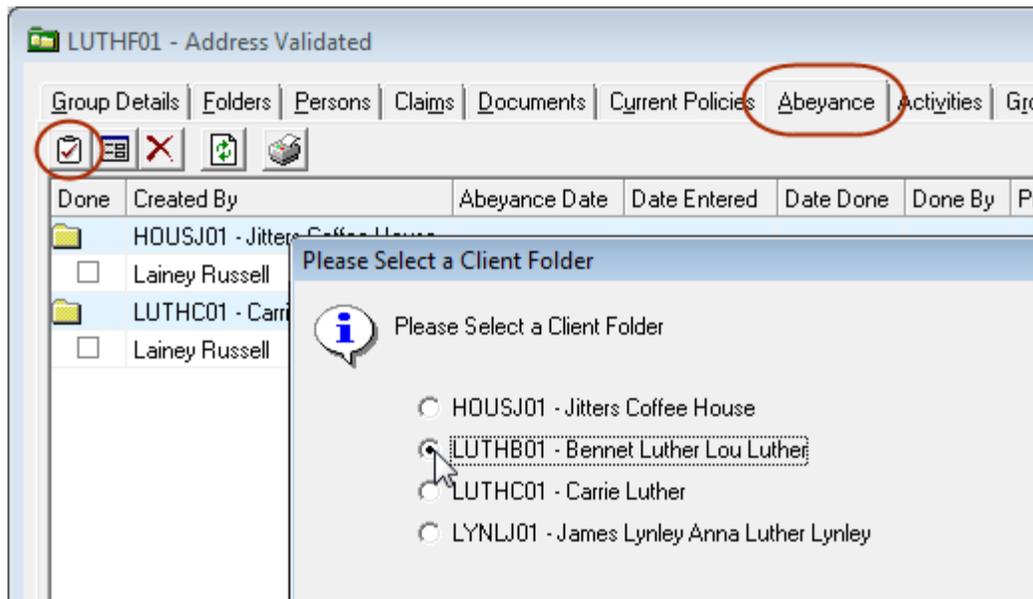


Abeyance Tab

The **Abeyance tab** shows abeyances attached to the Group Folder, organized by client folder. Note that abeyances can be created, viewed, modified, sorted, printed, and deleted from this tab.

- To create a new abeyance, simply click the **New button** on the **Abeyance toolbar**, select the target client folder in the **Please Select a Client Folder window** (see Figure 2.17), and then carry on to enter abeyance details on the **New Abeyance tab** in the **Activities window**.

(Figure 2.17)

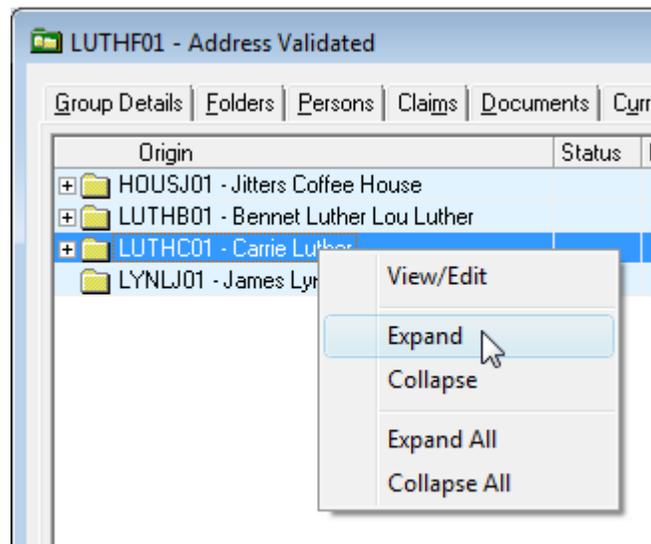


Activities Tab

The **Activities tab** lists activities relevant to the Group Folder, grouped according to client folder.

- To view the activities for a particular client folder, either click the **plus (+) sign** beside the folder, or right-click the folder and select **Expand** (see Figure 2.18).
 - To view all activities for all folders in the group, right-click a folder and then click **Expand All**.

(Figure 2.18)



- Double-click a client folder or a particular activity to open the Activities window to view, create, modify, or print an activity, or to create an **Activity Report**.
- Use the **minus (-) sign** beside a client folder or the **Collapse feature** in the right-click menu to close the list of activities.

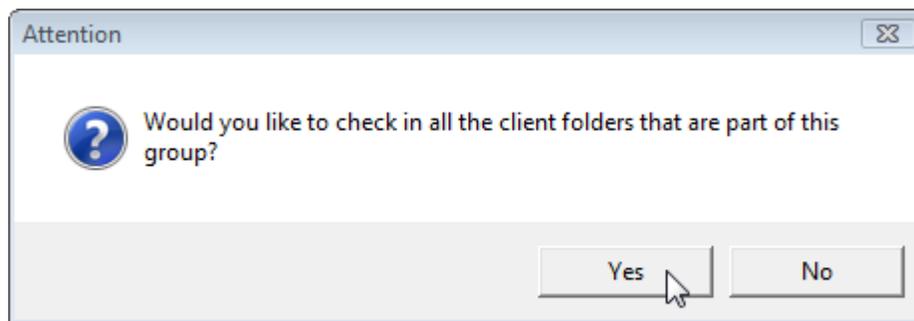
Group Info Tab

The **Group Info tab** contains additional information about the group as a whole, including the associated Producer(s), Classification, and Agency, Branch, and Department for this Group Folder.

- The **Group ID (folder) number** can be edited from this tab.

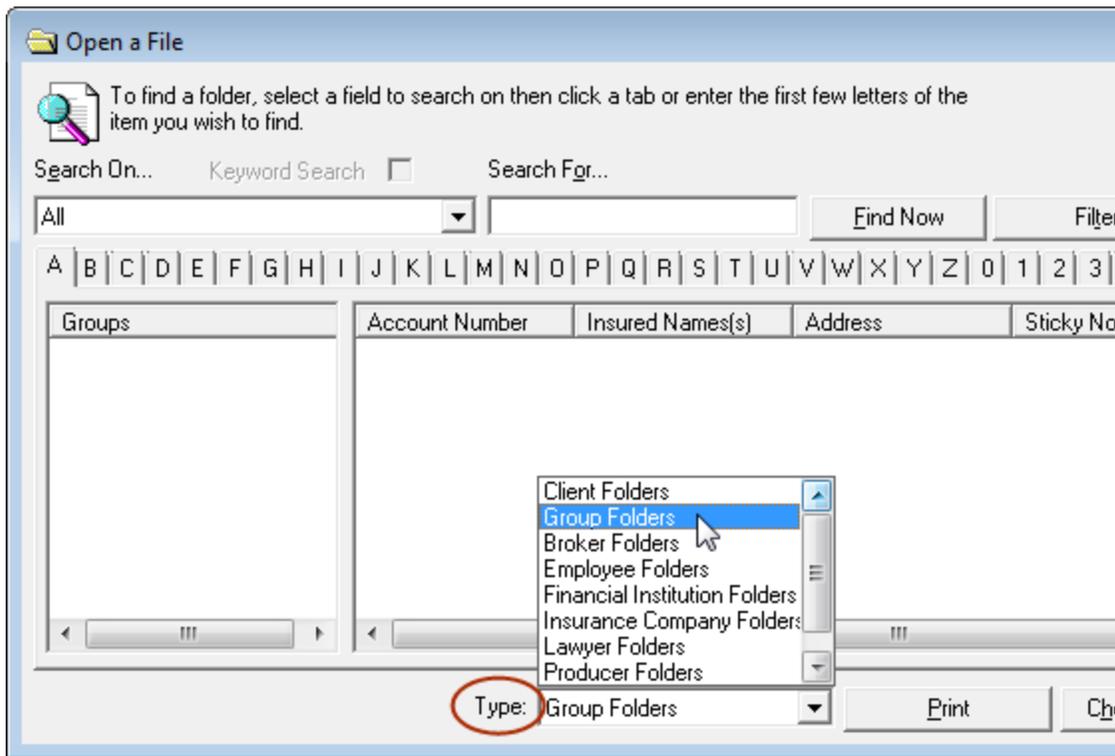
To check in a Group Folder, right-click the folder in the **Desktop Tree** and then click **Check In** on the shortcut menu. If any client folder in this Folder Group is also on the Desktop, the user will be asked whether he/she would like to check in all client folders in the group, as well (see Figure 2.19).

(Figure 2.19)



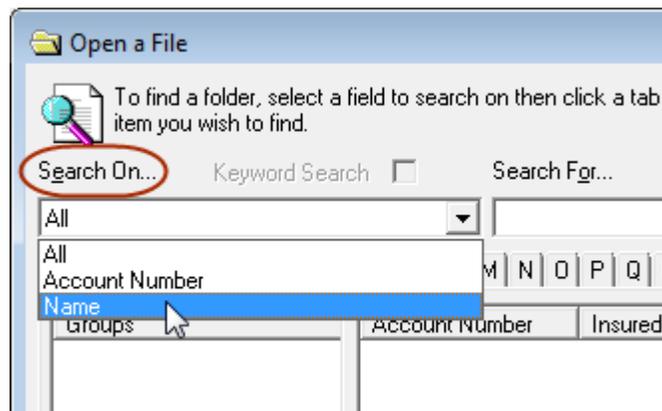
Checking a Group Folder out of the File Cabinet is very much like checking out a client folder. To check out a Group Folder, double-click the **File Cabinet** in the **Desktop Tree** or click the **Open** button on the TBW toolbar. To narrow the search to include only Folder Groups, select **Group Folders** from the **Type drop-down menu** (see Figure 2.20).

(Figure 2.20)



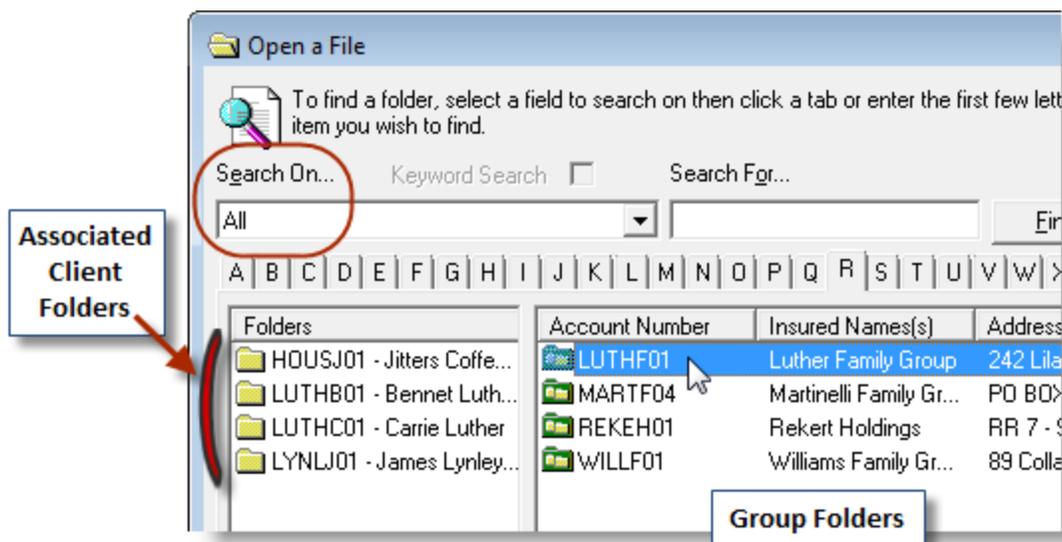
When searching for a particular Folder Group in the **Open a File window**, the user can choose to search for **All** relevant folders, to search by **Account Number**, or to search by **Name** in the **Search On field** (see Figure 2.21). Then click the **Find Now button** to initiate the search.

(Figure 2.21)



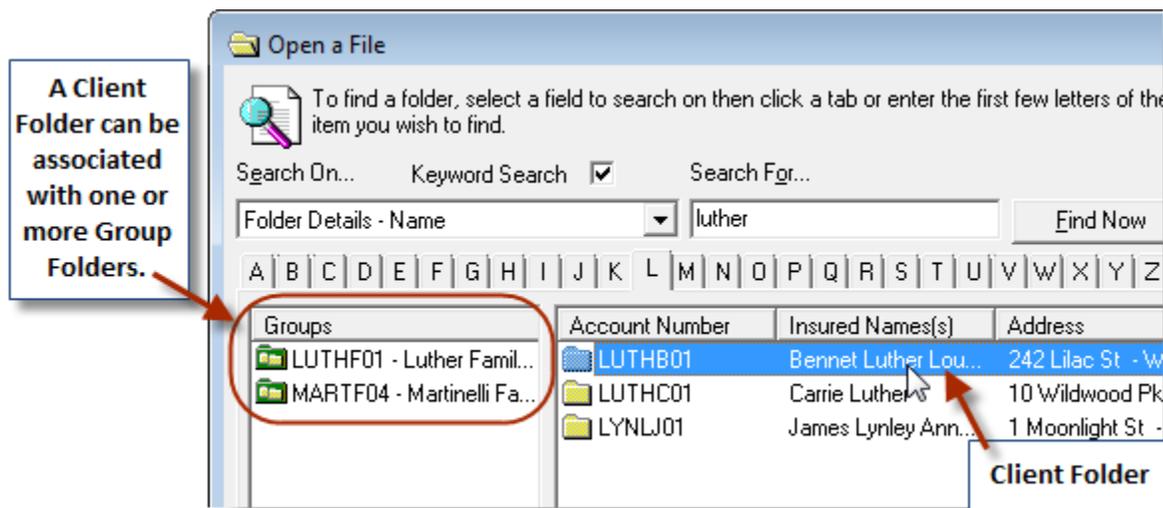
All relevant Group Folders will appear in the right pane. Simply click a specific Group Folder to view its associated client folders in the left pane (see Figure 2.22). Either double-click a folder, or click a folder and then click the **Checkout Folder** button, to move any folder (group or client) to the TBW Desktop.

(Figure 2.22)



The user can also search for a particular Group Folder by first finding a related client folder. Use relevant search filters to find the target client folder, which will appear in the right pane of the **Open a File** window. Then, click the client folder, and any related Group Folder(s) will be shown in the left pane (see Figure 2.23). **Note that you can choose to associate a client folder with one or more groups.** Once again, double-click any group or client folder to check it out of the File Cabinet and place it on the Desktop.

(Figure 2.23)



Note that checking out a Group Folder will not automatically check out all associated client folders; rather, client folders must be checked out individually. Likewise, checking out a client folder that is part of a Group Folder will not automatically check out the relevant Group Folder. Each Group Folder and client folder must be checked out separately as necessary.

Most actions performed in the Group Folder – from making a policy change, to adding a person, to monitoring a claim – require that the client folder be checked out and available on the Desktop Tree. TBW automatically carries out folder check-outs for you, when necessary. Please remember that a client folder or Group Folder checked out by another TBW user will only be available in read-only format until that user has finished with and checked in that folder.

Please note that this Folder Groups enhancement is available only on the SQL database platform.

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Please share this information with all TBW users in your office(s). Once you have reviewed this document, if you have any questions regarding these enhancements and 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**.

Yours sincerely,

Custom Software Solutions Inc.

