21 February 2012

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 to **The Broker's Workstation (TBW)** and **the Underwriter's Workstation (TUW)**:

Contents

1.   **Expiry Report Update** – The Expiry Report has been enhanced with a number of new options and features, including the ability to group the report by category and filter the report by a specific Producer type, level, and code.

1.   Expiry Report Update

We are pleased to announce that the Expiry Report has been enhanced with the following new options and features:

- The report can be filtered by a specific Producer, Underwriter, or CSR type, level, and code.
- Report results can be grouped by a selected category.
- Report parameters can be named and saved for use at a later time.
- Cancelled policies will now be marked in the report to allow for easier identification when exporting the report to Microsoft Excel.
- All applicable policy codes will be listed in the report's **Pol Type** column.

To create an Expiry Report, click **Reports**, **Expiry Report**. In the **Expiry Report** dialog, enter report criteria as required, noting the following enhancements:
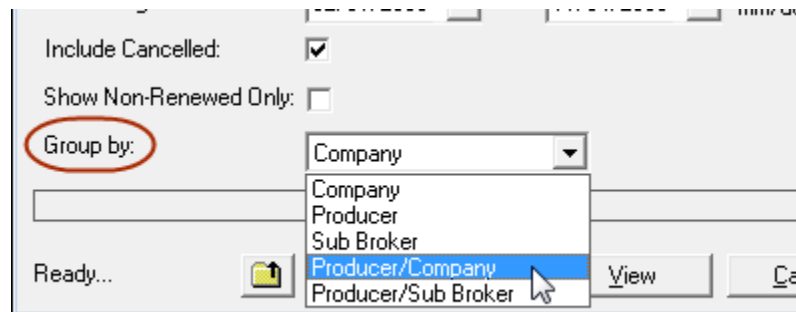
- The report can be filtered by a specific Producer **Type**, **Level**, and **Code** (see Figure 1.1).

(Figure 1.1)
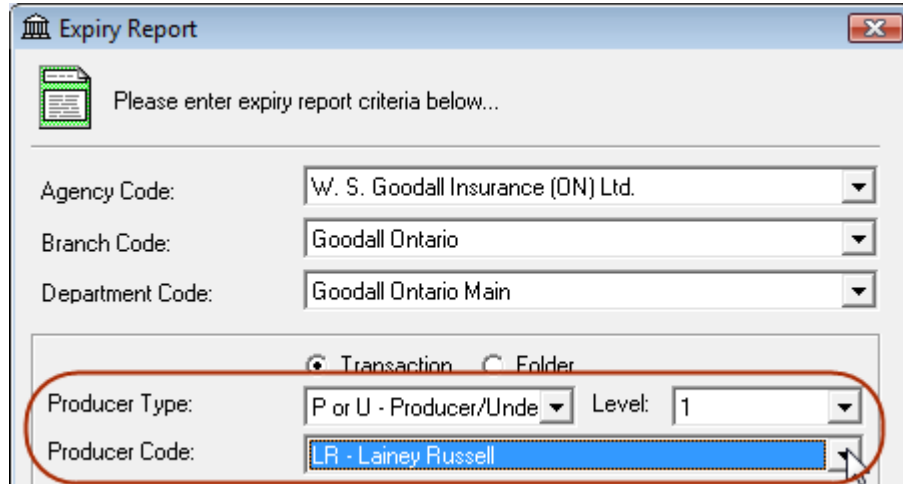
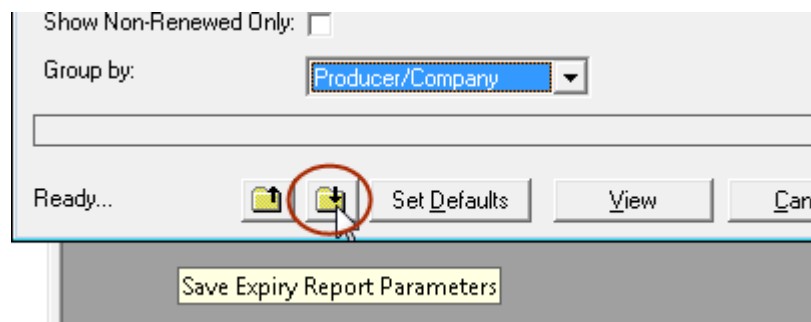- Results can be grouped by any one of a number of categories (see Figure 1.2).

(Figure 1.2)

- The report criteria entered can be saved as a template to be reused at another time. To save report parameters,
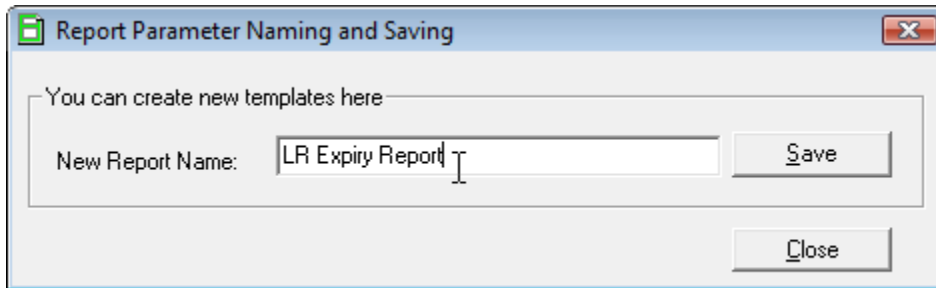
    a. Click the **Save Expiry Report Parameters** [icon] button (see Figure 1.3).
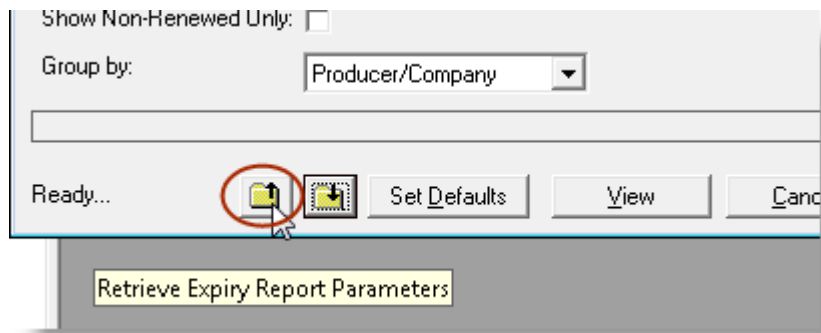
(Figure 1.3)

b. Enter a report name in the **Report Parameter Naming and Saving** window (see Figure 1.4), and click **Save**.
   - You will be prompted to enter a different name if the selected name has already been used.
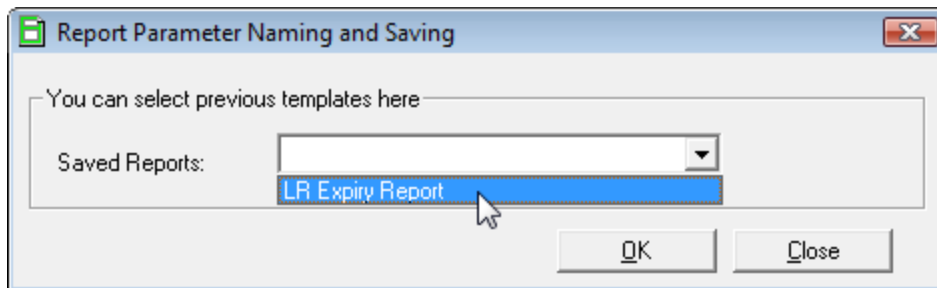
(Figure 1.4)

o A previously saved template can be opened by clicking the **Retrieve Expiry Report Parameters** button (see Figure 1.5). Select the desired template from the drop-down menu (see Figure 1.6), and then click **OK** to pre-populate the report criteria.

(Figure 1.5)

(Figure 1.6)

Click the **View** button in the Expiry Report dialog to create the Expiry Report. Note that Cancelled policies are displayed in red text and are also marked with a checkmark (see Figure 1.7) to allow for easy identification when exporting the report to Microsoft Excel.

(Figure 1.7)

Previously, the Expiry Report displayed a policy code of **Mult___** in the **Pol Type** column for policies with multiple codes (see Figure 1.8). This column has been enhanced so that all applicable policy codes are now listed (see Figure 1.9).

(Figure 1.8)

(Figure 1.9)

Multiple policy codes will also display as applicable when the report is exported to Microsoft Excel.

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 this feature or need further assistance in its usage, please contact our Client Services Team at 1-888-291-3588 (toll-free telephone) or clientservices@cssionline.com (email).

Thank you for using The Broker's Workstation and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.