



23 November 2016

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

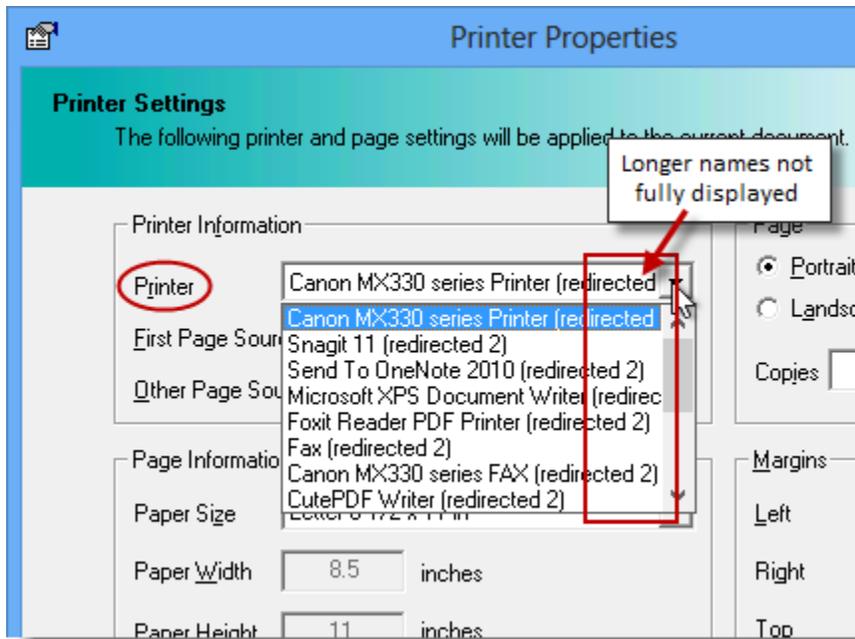
1. [Enlarged Printer Field in Printer Properties](#) – The Printer field in the Printer Properties form has been enlarged for easier viewing and selection of long printer names.
2. [Add Branch Details and Logo to Printed Payment Plan Schedule](#) – The printed Payment Plan Schedule can now include the branch presentation name and address details, as well as the organization logo.

1. Enlarged Printer Field in Printer Properties

The Printer field in the Printer Properties form has been enlarged for easier viewing and selection of long printer names when printing in TBW/TUW. This will be especially convenient for offices using redirected printers or when different names assigned to multiple printers results in lengthy printer names.

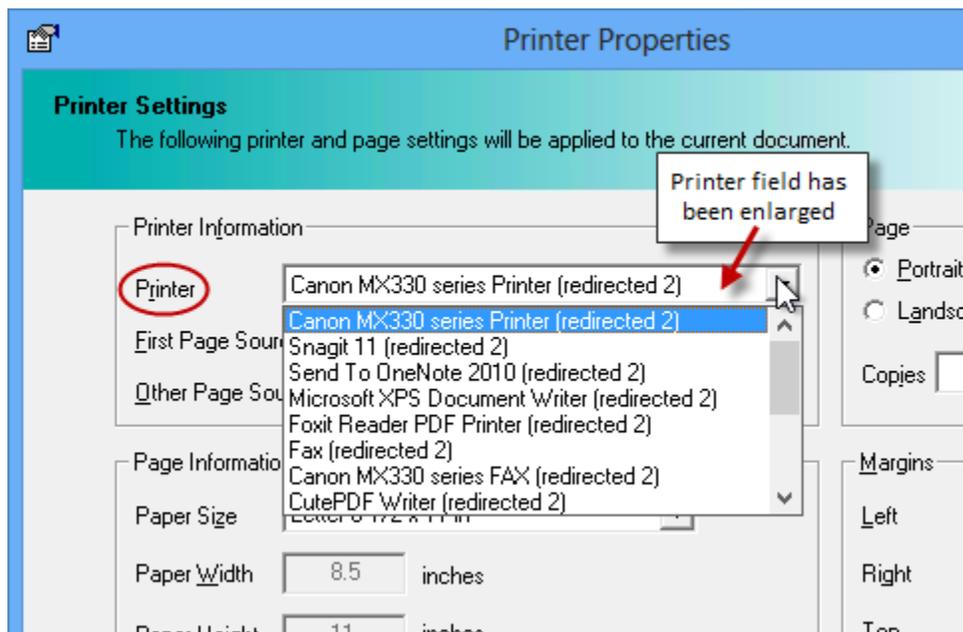
Previously, longer printer names did not display fully in the **Printer** field in the **Printer Properties** dialog (see Figure 1.1).

(Figure 1.1)



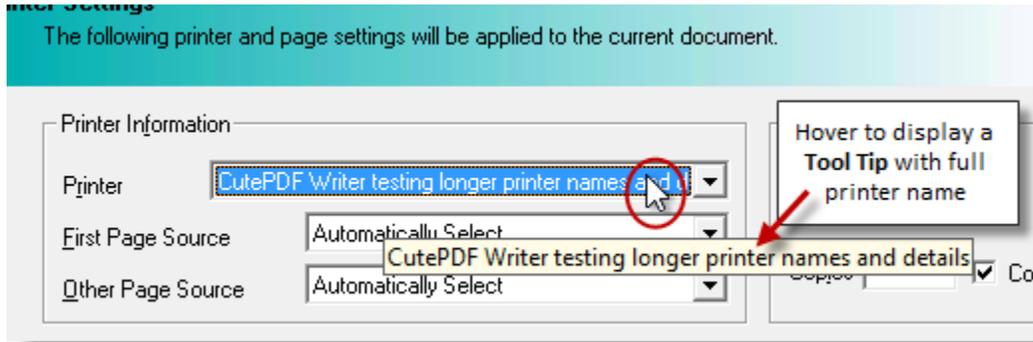
Now, the Printer field has been enlarged to allow for easier viewing and selection of longer printer names (see Figure 1.2).

(Figure 1.2)



A **Tool Tip** is also available to assist in viewing the entire printer name. Hover your mouse over the selected Printer to view a Tool Tip displaying the full printer name (see Figure 1.3).

(Figure 1.3)



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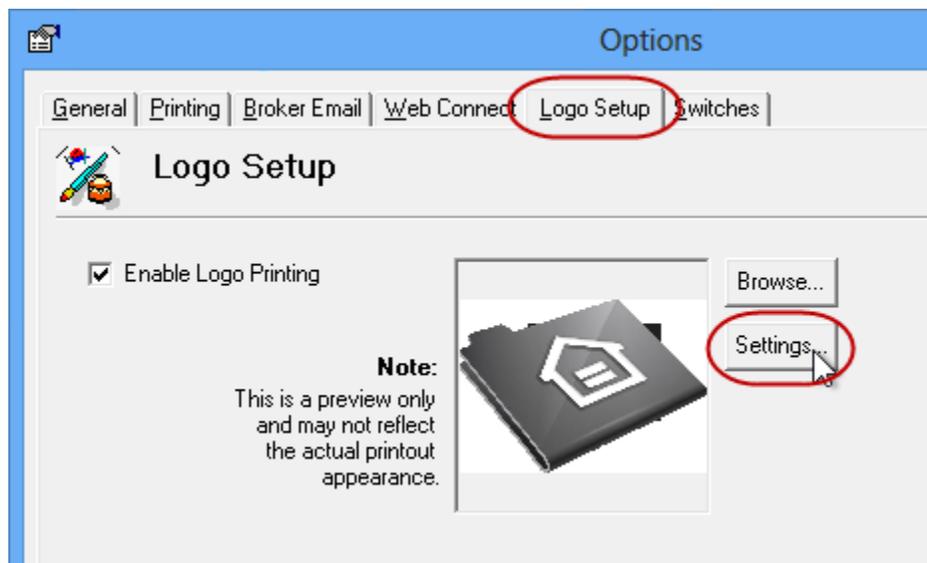
2. Add Branch Details and Logo to Printed Payment Plan Schedule

The printed Payment Plan Schedule can now include the applicable branch presentation name and address details, as well as the organization logo.

If you would like the applicable branch name, address details, and logo to display on the printed copy of the Payment Plan Schedule, please complete the following one-time setup for this optional feature.

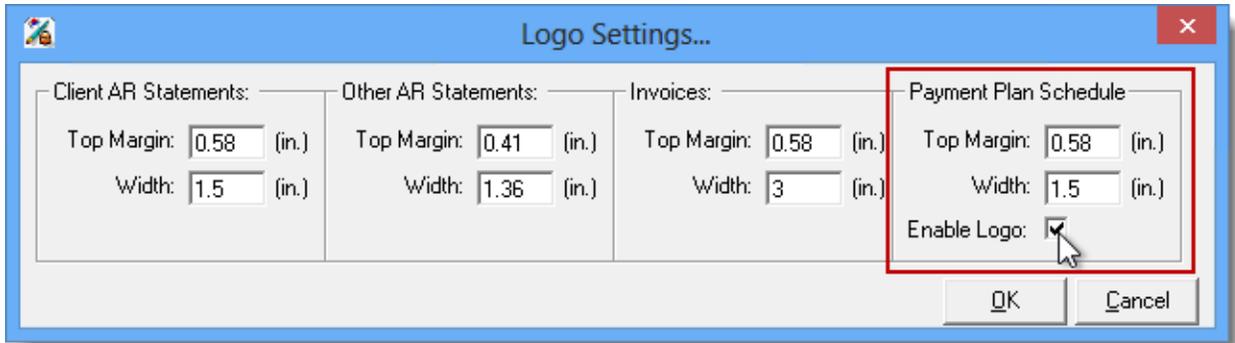
In the TBW/TUW window, click **Tools, Options**. On the **Logo Setup** tab in the **Options** dialog, ensure the **Enable Logo Printing** checkbox has been selected, and that the applicable logo is visible in the logo display area, as well. Then, click the **Settings** button (see Figure 2.1).

(Figure 2.1)



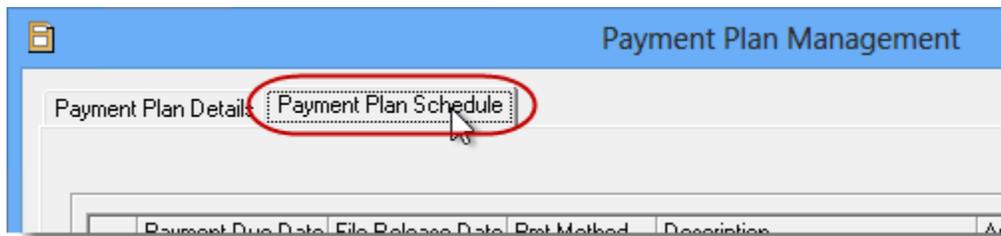
In the **Logo Settings** dialog, select the **Enable Logo** checkbox in the **Payment Plan Schedule** section (see Figure 2.2). Adjust Top Margin and Width values in this section, if needed, and then click **OK**.

(Figure 2.2)



To view and print the schedule for a Payment Plan, open the Payment Plan and click the **Payment Plan Schedule** tab (see Figure 2.3).

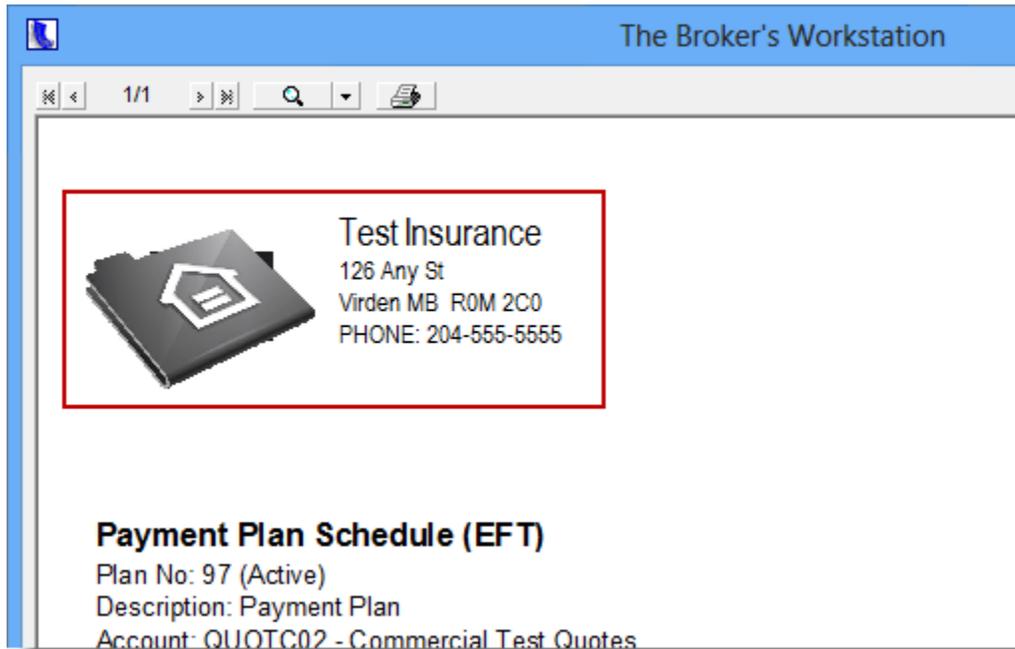
(Figure 2.3)



Click the **Print Schedule** button to print a copy of the schedule. If Print Preview is enabled (through *Tools, Options, Printing*), first preview and then print the schedule.

If the **Enable Logo** option was selected in the **Logo Settings** dialog, the branch presentation name and address, as well as the logo, will display at the top of the schedule (see Figure 2.4).

(Figure 2.4)



If you have any questions about or need help with logo setup for your office, please contact Client Services for assistance.

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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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