3 July 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 new features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

Contents

1. Auto Transact Abeyances Automatically Assigned to Account Representative

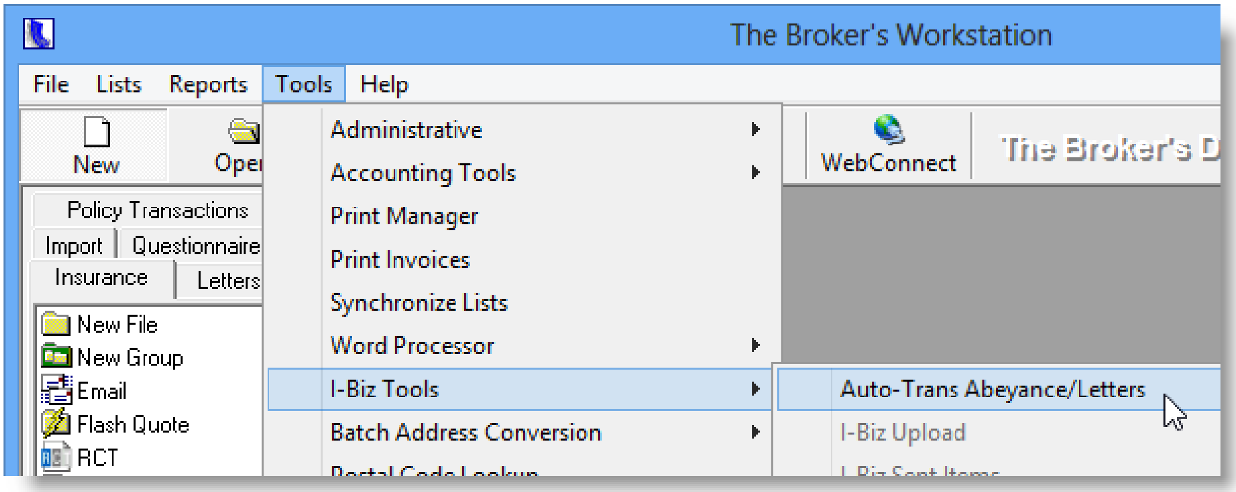
The Auto Transact feature allows for creation of rules for the assignment of Auto Transact Abeyances, and the person selected in the rule will receive Abeyances regarding any Auto Transact issues. Now, for those TBW/TUW users utilizing the Account Rep Manager feature, any Auto Transact Abeyances will automatically be assigned to the current Account Representative for the policy. This default setting is applicable only when no relevant Auto Transact rule has already been set up.

- For existing rules, any Auto Transact Abeyances will be assigned, in the usual manner, to the person selected in the rule.

Note: When an Auto Transact rule is created or modified, the Account Representative can now be selected to receive Abeyances and print job ownership for that rule. *To ensure any Auto Transact Abeyances are sent to the current Account Rep assigned to the policy, please update this selection as applicable in existing rules.*

To create or modify a rule for the assignment of Auto Transact Abeyances, click **Tools**, **I-Biz Tools**, **Auto-Trans Abeyance/Letters** (see Figure 1.1).

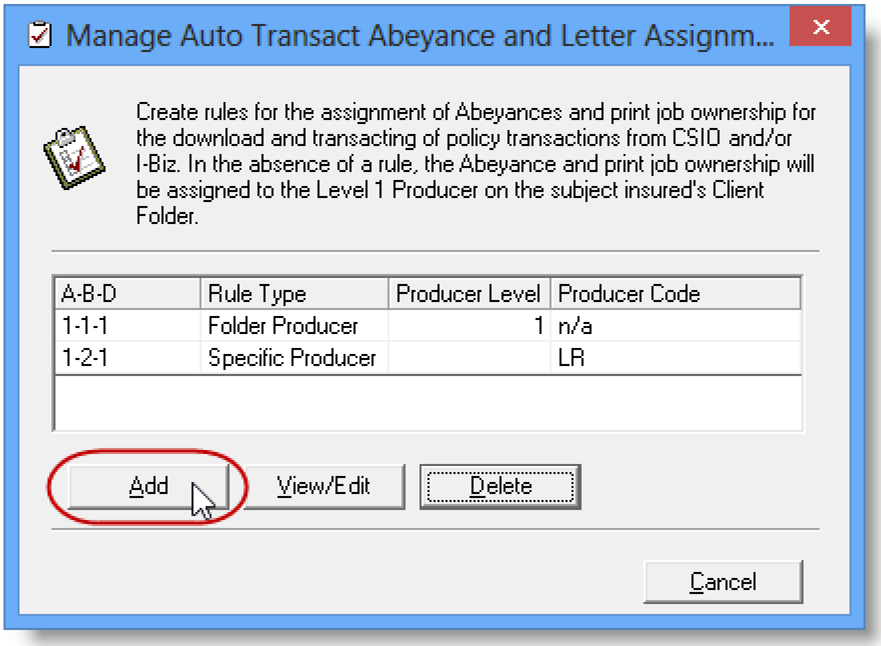
(Figure 1.1)



Any existing rules will display in the Rules grid. To modify a rule, double-click the target rule; to add a new rule, click the **Add** button (see Figure 1.2).

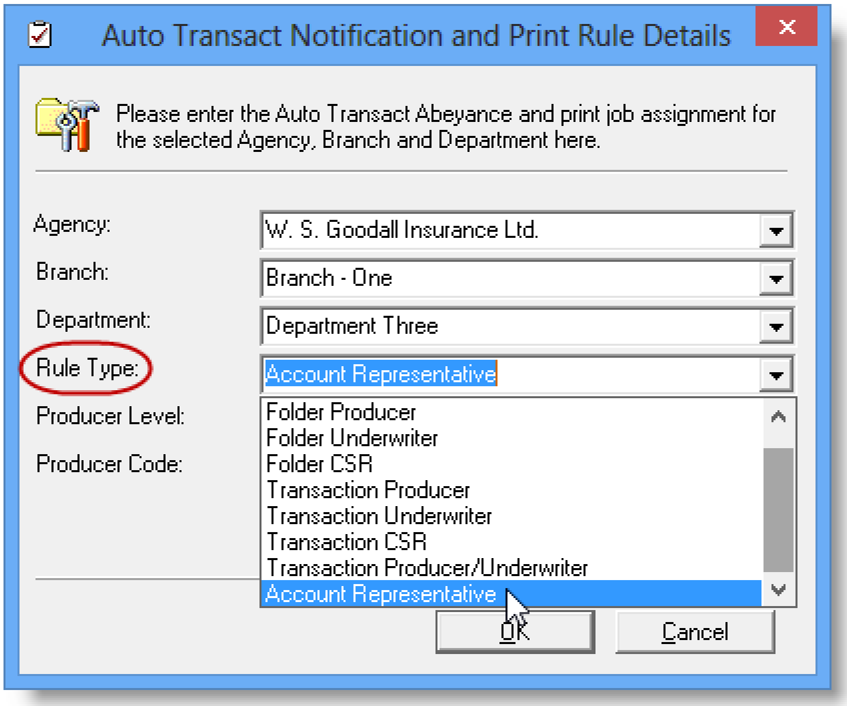
- Remember, only one notification rule can be created for each ABD (Agency, Branch, and Department).

(Figure 1.2)



In the **Auto Transact Notification** dialog, enter or modify details for the rule, as applicable. Note that **Account Representative** is now available for selection in the **Rule Type** menu (see Figure 1.3).

(Figure 1.3)



Return to Contents

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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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