24 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.   Select and Add Multiple Email Recipients Simultaneously

Previously, when you were using TBW/TUW Email to send an email message to multiple recipients, each email address had to be selected and added individually from the Address Book. Now, TBW/TUW Email has been improved with an "Add Multiple Recipients" feature, which allows you to select and add multiple email addresses at the same time to the Email Message form.

To use this feature when you are creating a new email message, click the **To** button in the **Email Message** form (see Figure 1.1).
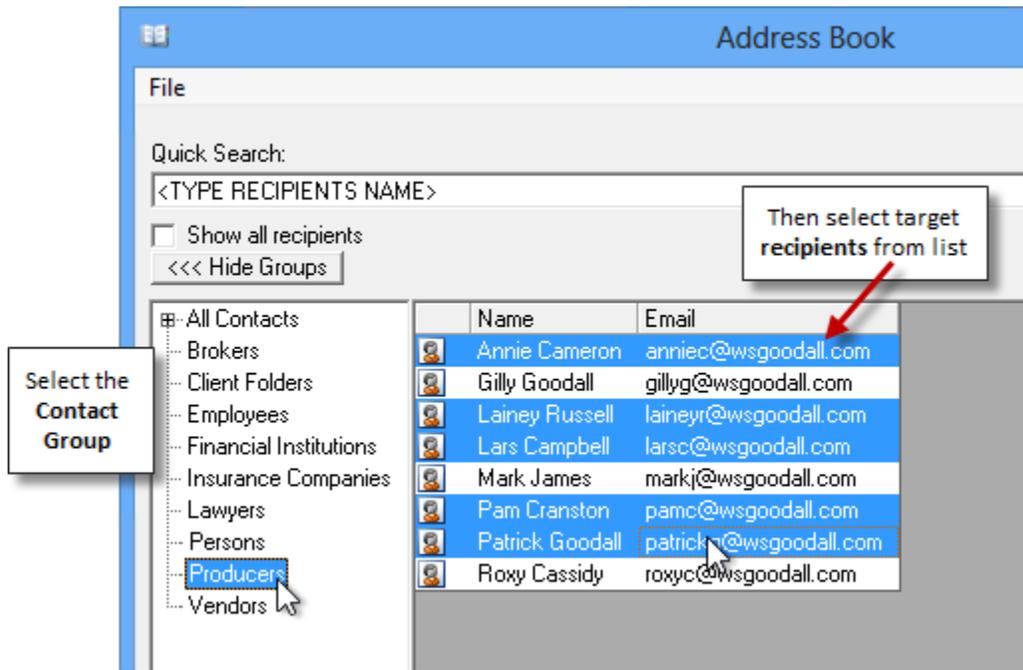
(Figure 1.1)
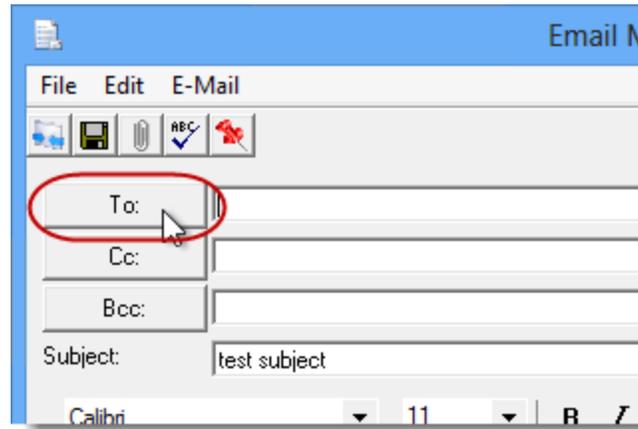
In the **Address Book**, select the applicable **Contacts List** in the left-hand pane. Then, in the list of Contacts that displays to the right, select the recipients to receive this email message (see Figure 1.2).

- Use the **Shift+click** option to select multiple sequential recipients in the list; use **Ctrl+click** to select multiple non-sequential recipients.

(Figure 1.2)

Once all target email addresses have been selected, either press **Enter** on your keyboard *or* right-click the selected group and then click **Add Multiple Recipients** in the right-click menu (see Figure 1.3). The selected email addresses will be added to the **To** field in the Email Message form.

- Repeat these steps as required to add additional email addresses from other Contact Groups or to add recipients to the Cc and/or Bcc fields.

(Figure 1.3)
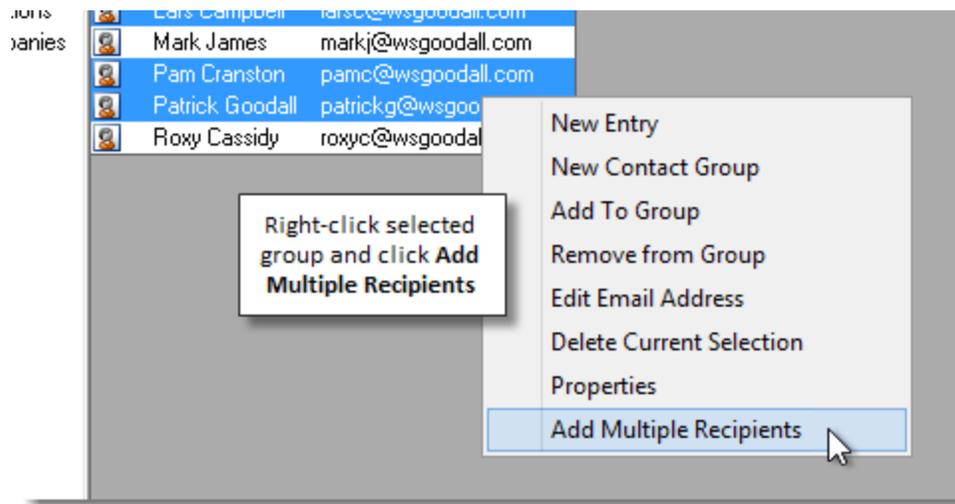
When all target recipients have been added, simply complete and send the email message in the usual manner.
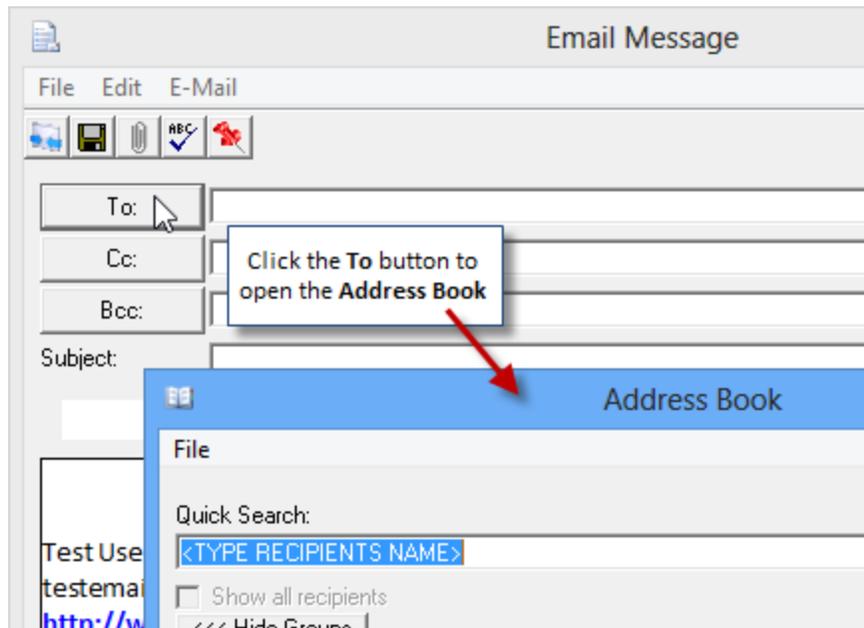
2. Search by First Name in Persons Contact Group in Email Address Book

When you are sending email messages using TBW/TUW Email, Contact Groups in the Address Book can be used to find and insert email addresses for specific clients and other contacts quickly and easily. For example, the Persons Contact Group is a timesaving, convenient way to locate email addresses for people listed on the Persons tab in Client folders.

Now, locating a target email address in the Persons Contact Group is even easier with the addition of first name search capability.

To find and insert an email address in the Email Message dialog, click the **To** button to open the **Address Book** (see Figure 2.1).
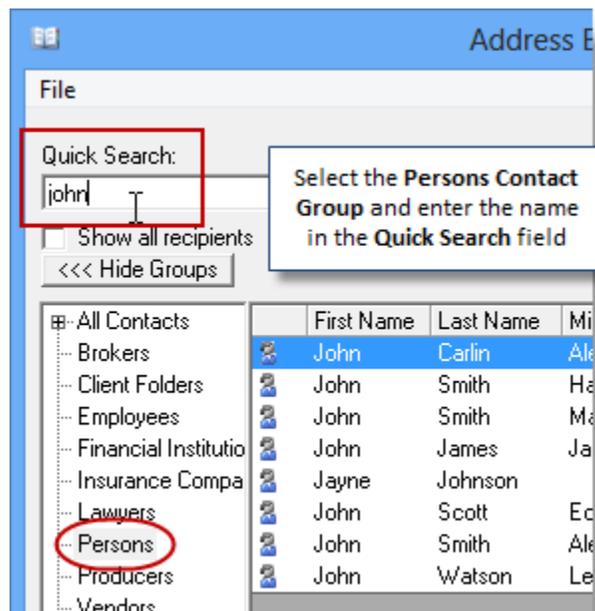
(Figure 2.1)

Select the **Persons Contact Group** in the left pane and, to filter results by the person's first name, enter part or all of his or her first name in the **Quick Search** line (see Figure 2.2).

- This search can also be performed by the person's last name.

(Figure 2.2)

Any person with a first (or last) name matching the search parameters will display in the list. Select the target person, and click the applicable **Message Recipient** button (*To*, *Cc*, or *Bcc*) to add the

person's email address to the corresponding field (see Figure 2.3). Repeat as required to select additional recipient email addresses for this message, and then click **OK** in the Address Book dialog.

(Figure 2.3)
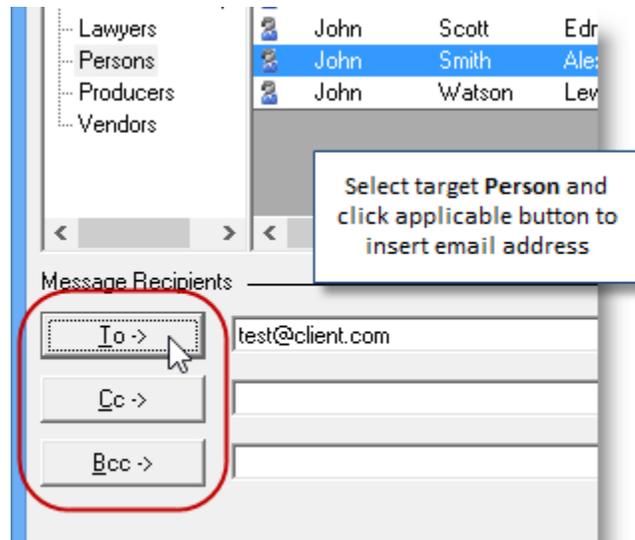
The selected email address(es) will be inserted in the applicable recipient fields in the **Email Message** window (see Figure 2.4). Complete and send the message in the usual way.

(Figure 2.4)
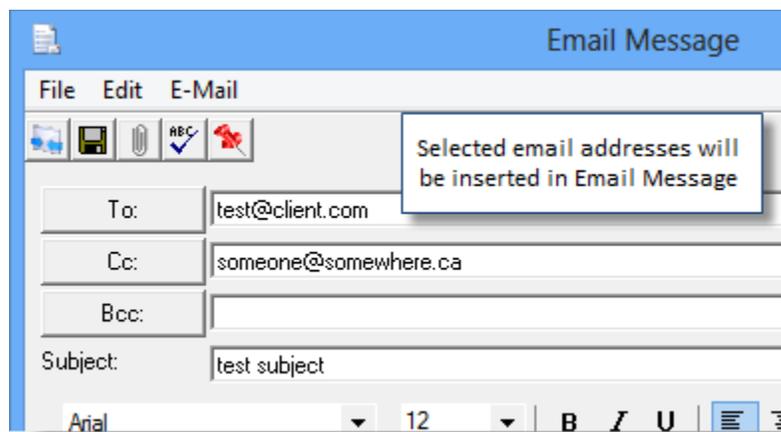
Return to Contents

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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