



21 February 2020

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. [User Rights for Applying Service Charge on Client Info Tab](#) – The ability to apply or adjust a service charge on the Client Info tab in Folder Details is now controlled by User Rights.

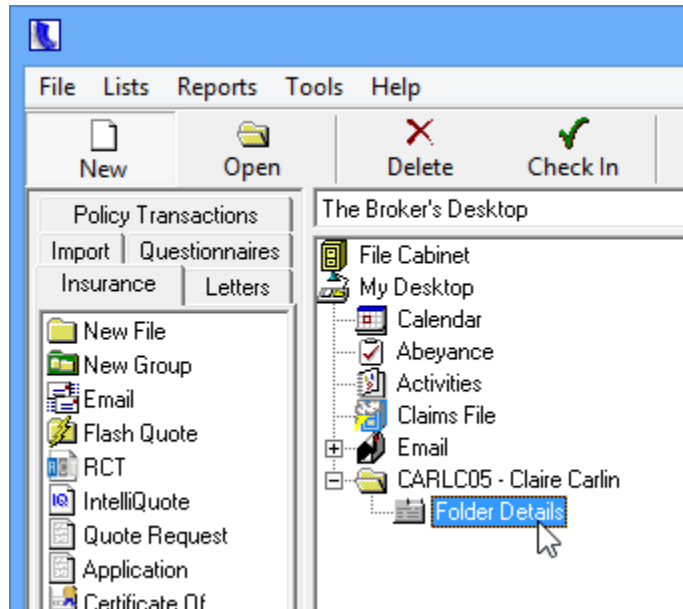
1. User Rights for Applying Service Charge on Client Info Tab

The ability to apply or adjust a service charge on the Client Info tab in Folder Details is now controlled by User Rights, and only those with applicable User Rights can select/deselect the Apply service charge cycles checkbox or modify the value in the corresponding field.

Please note: It is intended and recommended that a TBW/TUW user be given the same rights for this feature for every ABD (Agency/Branch/Department) in your organization (i.e. each user either will or will not have the right to modify the Apply service charge cycles option organization-wide).

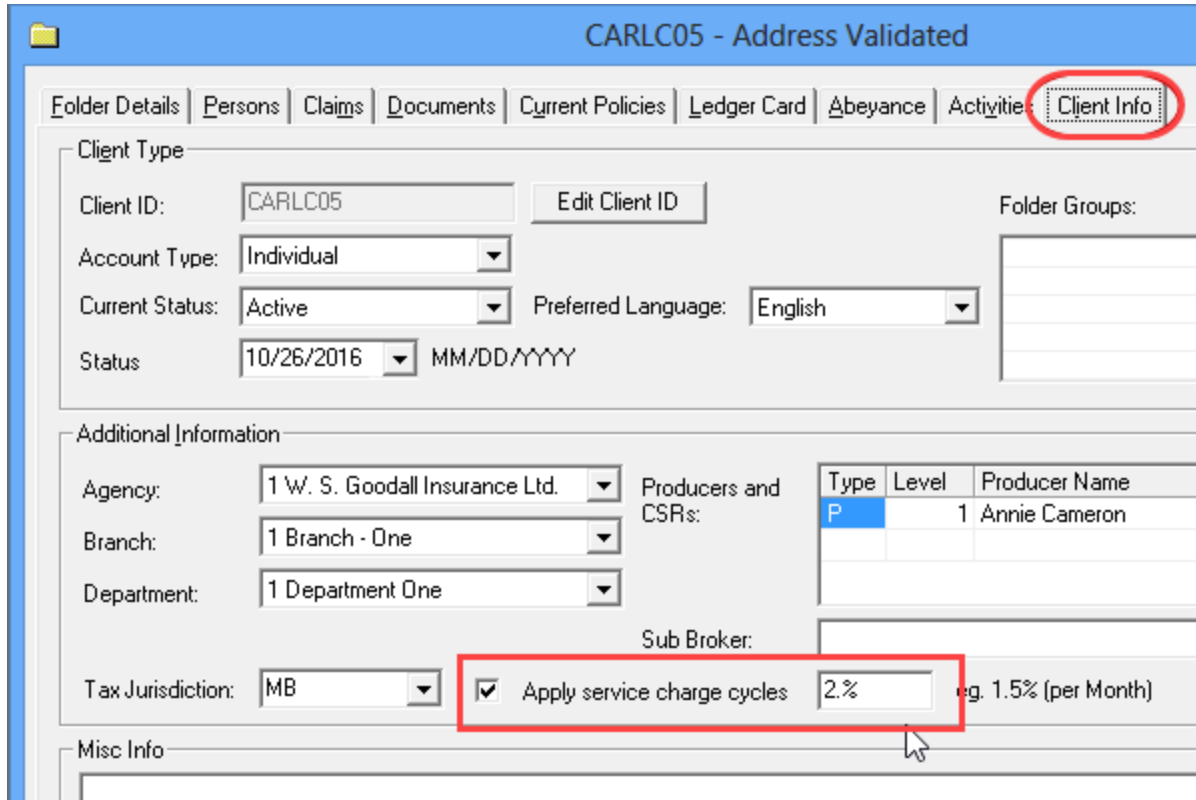
To view this feature, first double-click **Folder Details** in the Desktop Tree (see Figure 1.1).

(Figure 1.1)



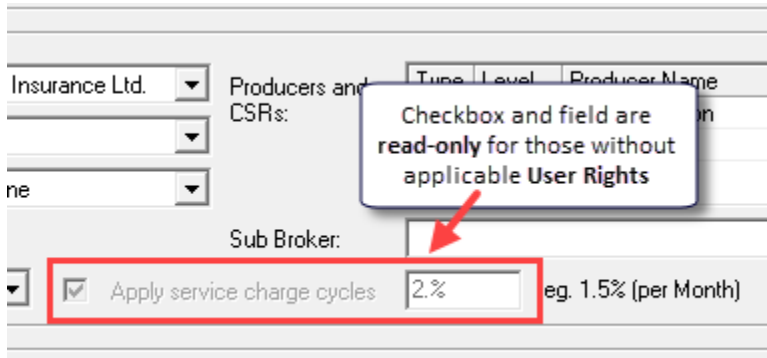
On the Client Info tab in Folder Details, the Apply service charge cycles checkbox and field are found in the **Additional Information** section (see Figure 1.2).

(Figure 1.2)



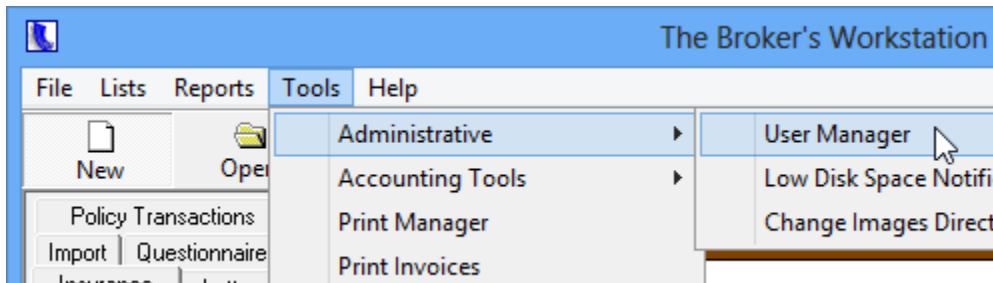
- For any user without applicable User Rights, the Apply service charge cycles checkbox and field will be greyed-out/read-only (see Figure 1.3).

(Figure 1.3)



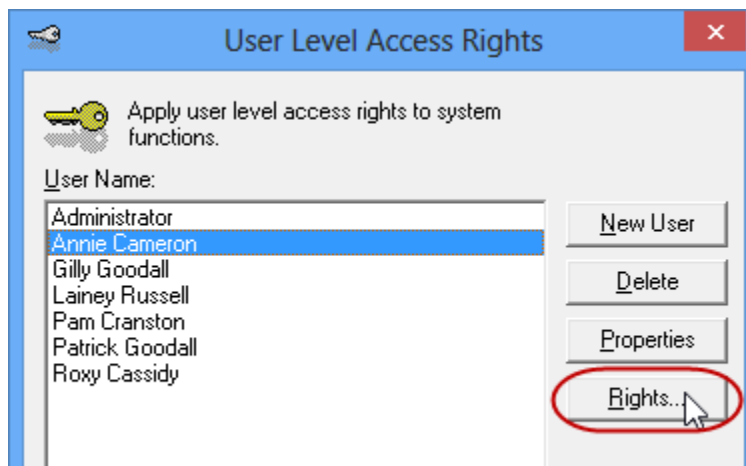
To set User Rights for the Apply service charge cycles feature, click **Tools, Administrative, User Manager** in the TBW window (see Figure 1.4).

(Figure 1.4)



In the **User Level Access Rights** dialog, select the applicable user, and then click the **Rights** button (see Figure 1.5).

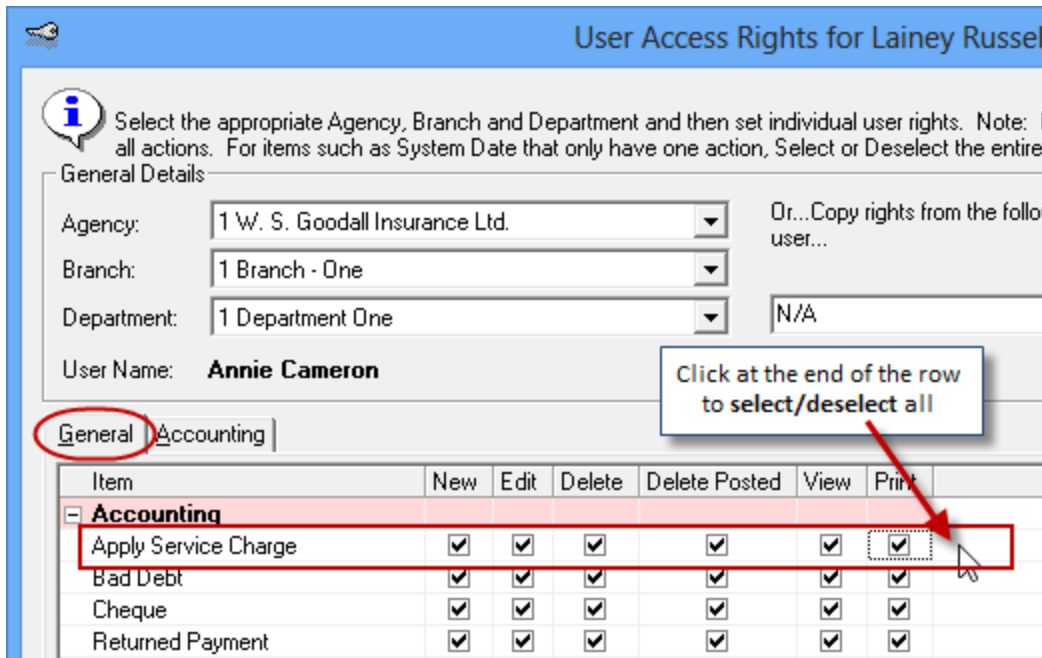
(Figure 1.5)



In the User Access Rights dialog, select the applicable **ABD** (Agency/Branch/Department) and then, on the **General** tab, set appropriate rights for this user for the **Apply Service Charge** item in the Accounting section (see Figure 1.6). Click **OK**.

- Note that only those users given **Edit** rights for this feature will be able to select/deselect the Apply service charge cycles checkbox or modify the service charge amount applied in Folder Details.

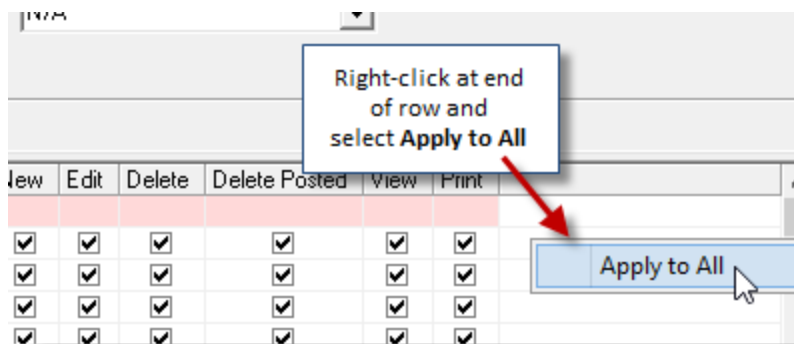
(Figure 1.6)



Repeat as required for additional ABDs for this user, *or*, to apply the selected Apply Service Charge rights to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.7).

- **Please note:** It is recommended that a user be given the same User Rights for this particular feature for every ABD in your organization (i.e. he/she either will or will not have the right to modify the Apply service charge cycles setting organization-wide).

(Figure 1.7)



Click **Close**. If required, repeat these steps for additional users in your organization.

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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)

To unsubscribe from our email notifications and updates, please contact us at info@cssionline.com or reply to this email.