



28 October 2021

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

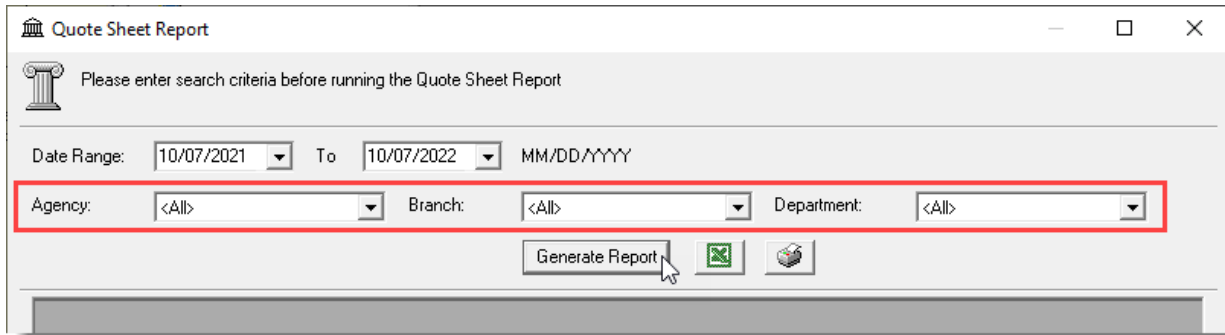
1. [Filter Quote Sheet Report Results by ABD \(TUW\)](#) – When generating a Quote Sheet Report, you can select to view results for all or a selected ABD (according to User Rights).

1. Filter Quote Sheet Report Results by ABD (TUW)

For our TUW users, the Quote Sheet Report has been enhanced with the ability to filter report results by ABD (Agency-Branch-Department). When generating a Quote Sheet Report, you can select to view results for all ABDs or a selected ABD.

To generate a Quote Sheet Report, click **Reports, Quote Sheet Report**. In the Quote Sheet Report form, enter search criteria. In the Agency, Branch, and Department menus, select All or a specific ABD (see Figure 1.1). Click the Generate Report button to view report results for the selected ABD(s) in the Report section below.

(Figure 1.1)

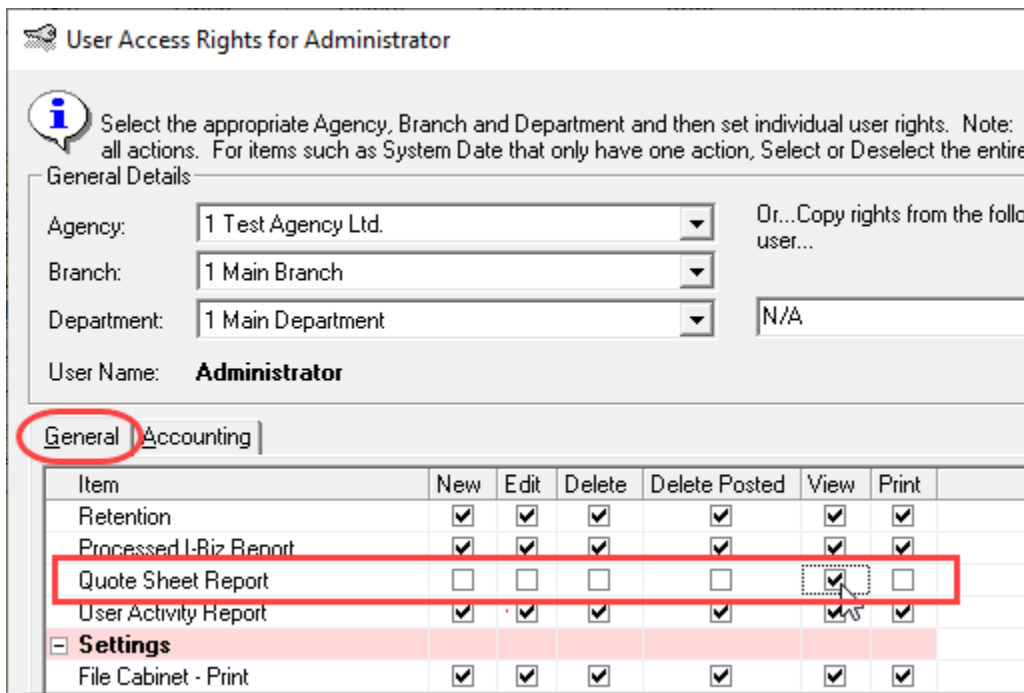


Please note, the ability to view Quote Sheet Report results by ABD is managed by User Rights. When a Quote Sheet Report is generated, results will include only policy data where the Folder ABD assignment matches an ABD for which the user has Quote Sheet Report User Rights.

To assign User Rights for the Quote Sheet Report, click **Tools, Administrative, User Manager**. In the User Level Access Rights window, select the User and click the **Rights** button. On the General tab in the User Access Rights window, choose the **ABD**. In the Reports section, assign the **View User Right for Quote Sheet Report** (see Figure 1.2).

- Enabling the View User Right will allow this user to view Quote Sheet Report results for the selected ABD.

(Figure 1.2)



Click OK in the User Access Rights window to save these rights for this user for this ABD, and then click OK in the Attention pop-up.

If required, assign Quote Sheet Report User Rights for additional ABDs for this user, *or*, to apply the selected rights for Quote Sheet Report to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu.

Click Close in the User Access Rights window.

Repeat these steps for each additional TUW user requiring User Rights for Quote Sheet Report.

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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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