

11 August 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

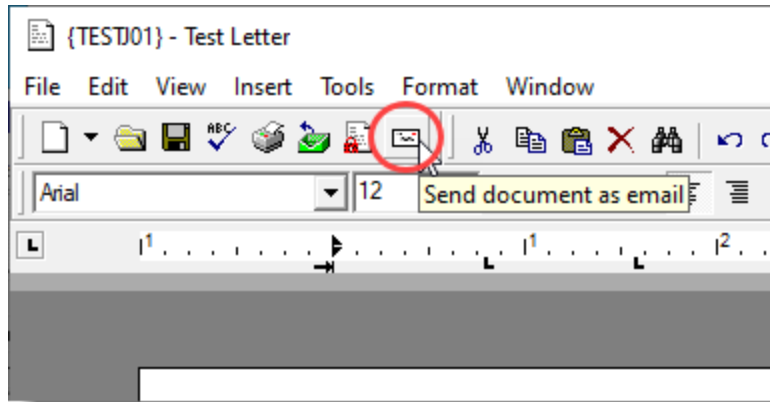
1. [Use the Add Button to Attach TBW Documents to Email Sent from the Word Processor](#) –
Use the Add button to attach one or more TBW documents to an email sent from the TBW Word Processor window.

1. Use the Add Button to Attach TBW Documents to Email Sent from the Word Processor

Previously, TBW documents could be attached to an email sent from the TBW Word Processor window using drag and drop. Now, you can also use the Add button to select one or more TBW documents from a client folder to attach to an email sent from the word processor.

To view this feature, create a client document in the usual way by dragging and dropping a word processor template from the Letters Tray onto a folder or document in the Desktop Tree. When you are ready to send the email from the word processor window, click the **Send Document as Email**  button on the toolbar (see Figure 1.1).

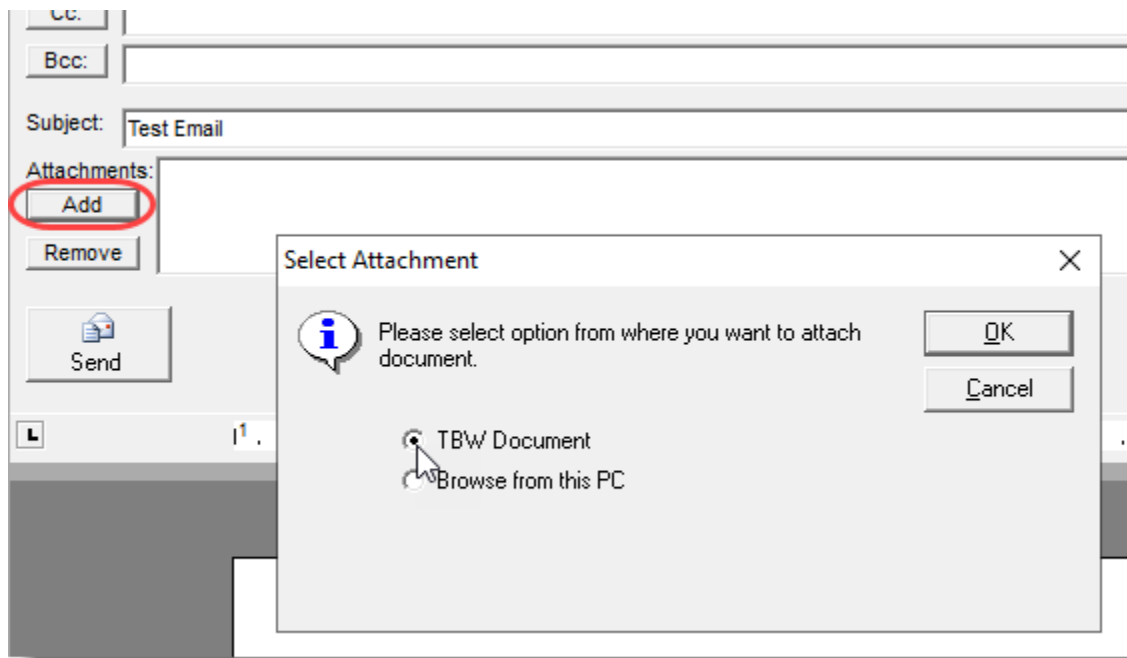
(Figure 1.1)



Enter details for the email message (e.g. To, Subject). To attach a TBW document to the email, click the **Add** button in the Attachments section. In the Select Attachment pop-up, select **TBW Document** and click OK (see Figure 1.2).

- To attach an external document (from outside TBW), select **Browse from this PC** instead.

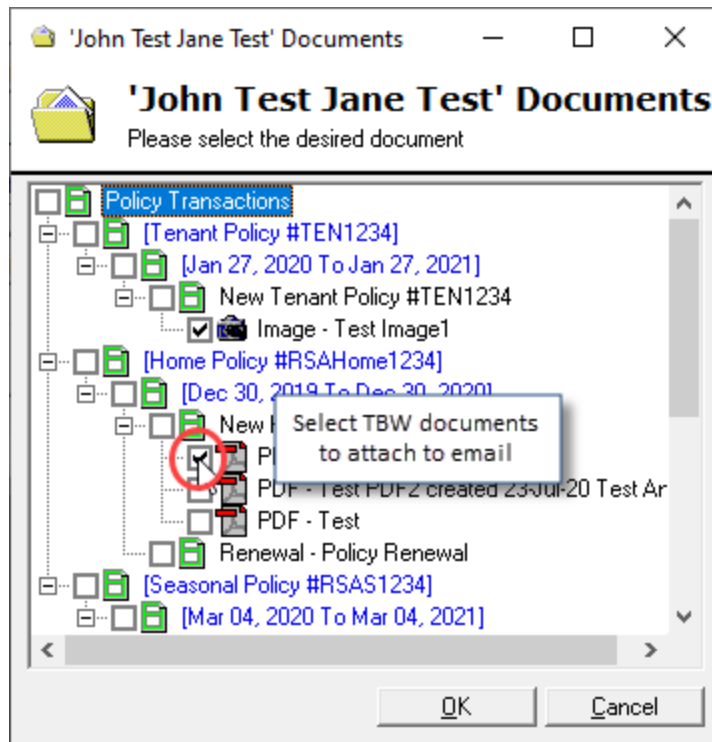
(Figure 1.2)



In the **Documents** window, available documents for the current client will display. Select one or more client documents to attach to the email (see Figure 1.3) and click OK.

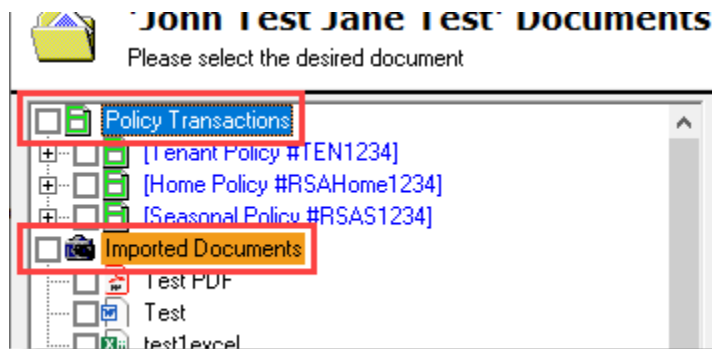
- Any client documents that can be attached will display in the list, including PDFs and imported files (e.g. Dec pages, persisted documents, Pink Cards, Microsoft Word and Excel files, images).

(Figure 1.3)



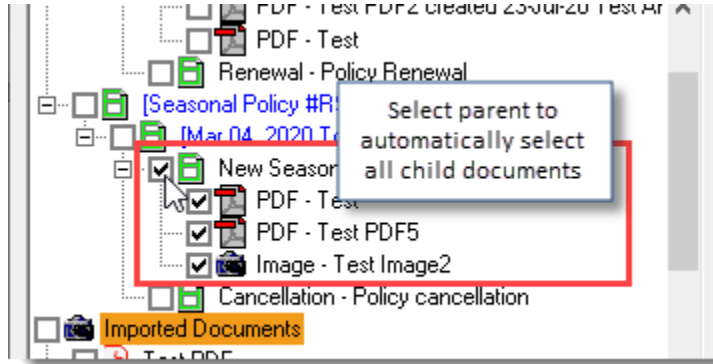
- Note that the Documents list is organized by category (*Policy Transactions* and *Imported Documents*) (see Figure 1.4).

(Figure 1.4)



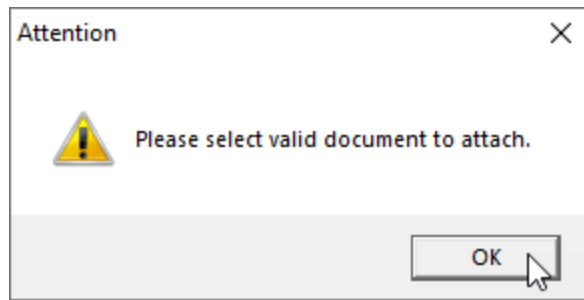
- If you select the parent in a document tree, all applicable documents in that tree will automatically be selected (see Figure 1.5). These selections can be adjusted as needed.

(Figure 1.5)



- If you select a policy item that has no applicable TBW documents to attach to the email, an Attention pop-up will display, asking you to select a valid document (see Figure 1.6).

(Figure 1.6)



Once attached to the email, selected document(s) will appear in the **Attachments** field (see Figure 1.7).

- Click the **Add** button again if you would like to attach additional TBW documents or external documents to the email.
- If you attach a document in error, select the item and click the **Remove** button.

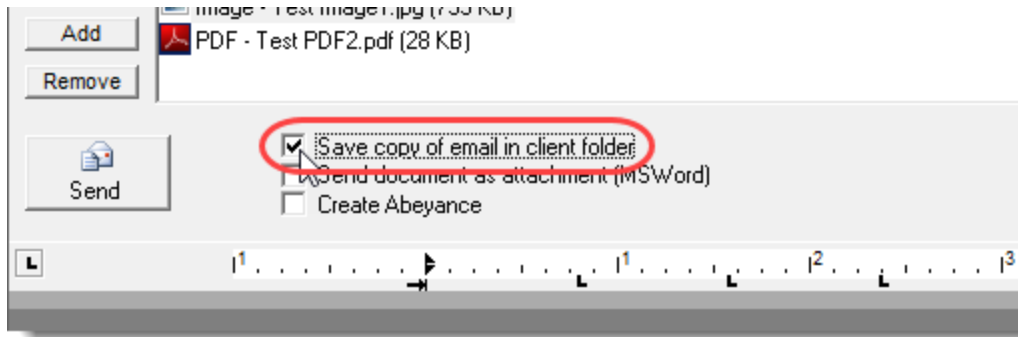
(Figure 1.7)



Once all documents have been attached to the message, you can complete and send the email.

- If you want to save a copy of the email in the corresponding folder, ensure the “Save copy of email in client folder” option is selected before sending the email (see Figure 1.8).

(Figure 1.8)



Note that you can use the Add button and/or the drag and drop option to attach TBW documents to an email sent from the word processor window.

- To use the drag and drop option, check out the document to be attached, and then drag and drop it from the Desktop Tree into the Attachments field in the word processor window. The attached document will display in the Attachments field.

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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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