

15 January 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. [Import a File into TBW using the Windows Clipboard](#) – Now, a file can be imported into a TBW client folder using the Windows Clipboard. Use this feature to import an image, PDF, or another file into TBW on your machine or through a Remote Desktop Connection.

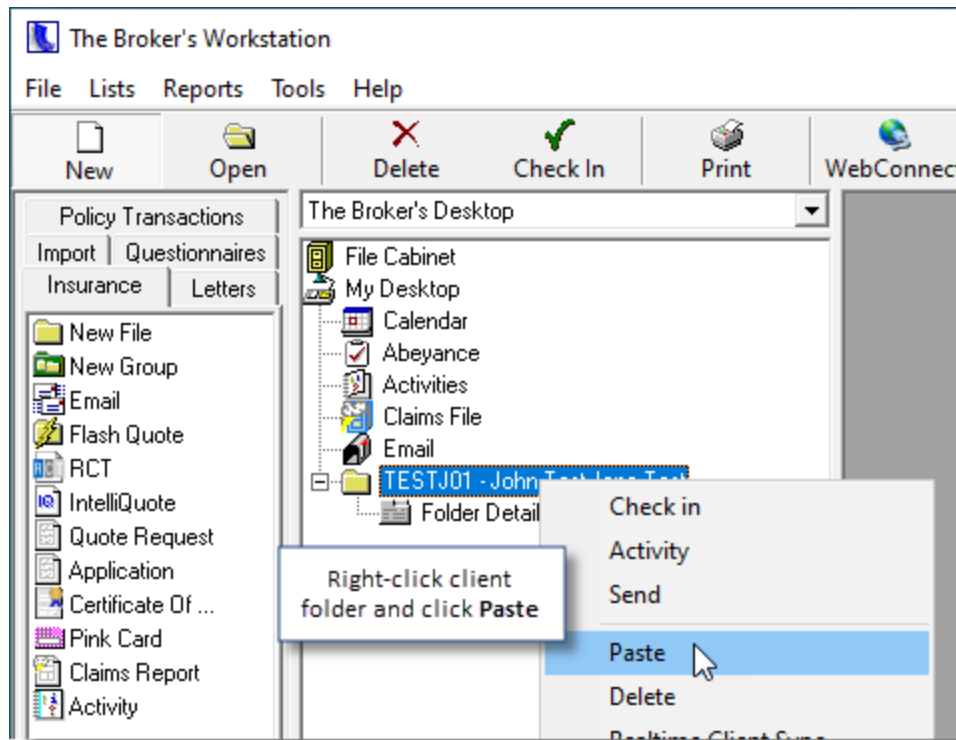
1. Import a File into TBW using the Windows Clipboard

A file can now be imported into a TBW client folder using the Windows Clipboard. This feature can be used to import a file (e.g. an image, PDF, or Microsoft Word or Excel file) from a folder on your computer into TBW. This feature can also be used to import a file from your local machine through a Remote Desktop Connection.

To import a file into a TBW client folder using the Windows Clipboard, first check out the client folder. Then, copy the applicable file on your computer. In the TBW Desktop Tree, right-click the client folder and select **Paste** (see Figure 1.1). The file will be imported into the client folder.

- You can also select the client folder in the Desktop Tree and click **Ctrl+V** on your keyboard to paste the file.

(Figure 1.1)



Once a file has been imported into a client folder in TBW, the file can be opened, viewed, renamed, moved, emailed, or deleted in the usual way, as required.

You can also use the Windows Clipboard to import a file from your local machine through a Remote Desktop Connection. To do this, open TBW through the Remote Desktop Connection and check out the appropriate client folder. Copy the applicable file on your local machine and paste it to the folder as described above. The file will be imported into the client folder.

Please note the following when using this feature:

- The maximum file size that can be imported into TBW using the Windows Clipboard is 80 MB.
- For files to be imported from your local computer through a Remote Desktop Connection, the Clipboard feature must be enabled on the Remote Desktop Connection.

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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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