

11 September 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. [Retention Report](#) – The Retention Report is a highly flexible reporting system that enables you to report retention of business in several ways. Once a Retention Report has been generated, corresponding retention percentages and counts of qualifying transactions are included in the report results.
2. [New Motorcycle Body Types in Vehicle Details](#) – In the Auto IntelliQuote, several new motorcycle body types are available for selection in Vehicle Details.

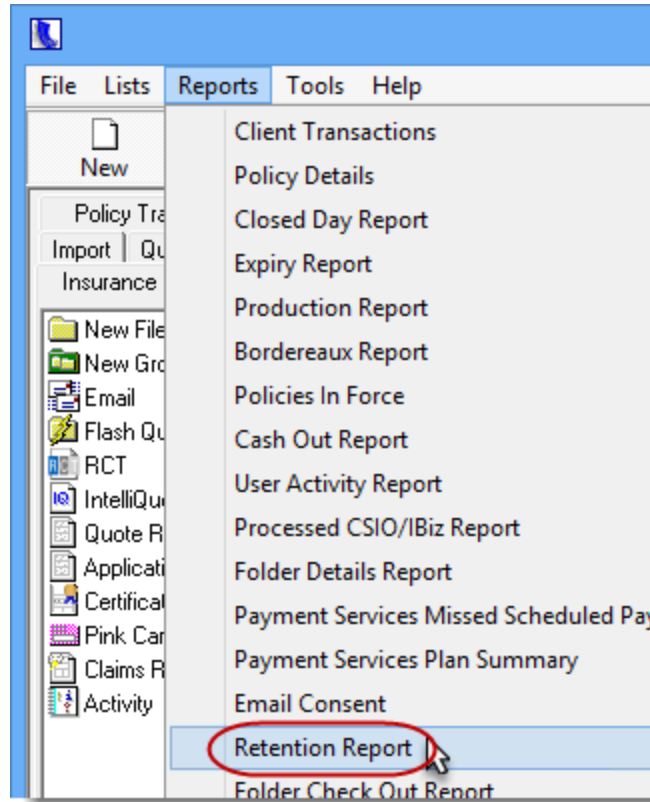
1. Retention Report

The Retention Report is a highly flexible reporting system that enables you to report retention of business in several ways, including by ABD (Agency/Branch/Department), carrier, sub-broker, line of business, producer, or any combination of these. Once a Retention Report has been generated, corresponding retention percentages and counts of qualifying transactions are included in the report results.

The Retention Report is created and managed in the **Retention Report Manager** dialog, which can be accessed by clicking **Reports, Retention Report** in the TBW window (see Figure 1.1).

- Note that the Retention Report can be created from The Broker's Desktop, but cannot be accessed from The Accountant's Desktop or The Underwriter's Desktop.

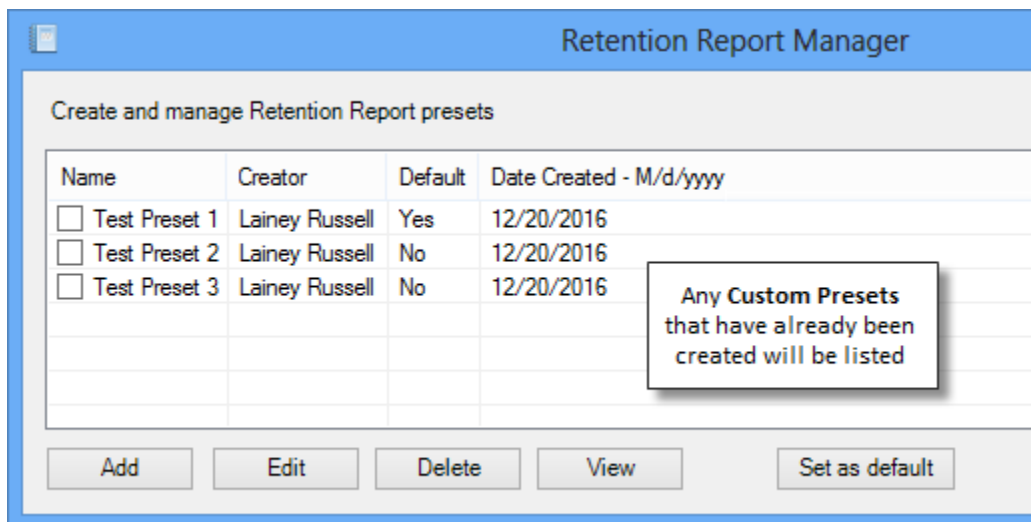
(Figure 1.1)



In the Retention Report Manager window, any custom presets that have already been created will be listed (see Figure 1.2).

- **Custom Presets** can be utilized to save and reuse commonly used report parameters, rather than having to enter report parameters from scratch each time you generate a Retention Report. Existing custom presets can be modified or deleted as required.

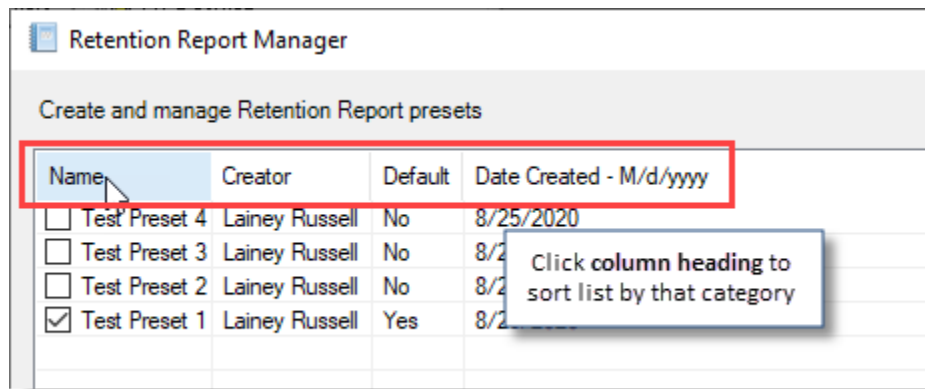
(Figure 1.2)



In the Retention Report Manager window,

- Click the **Add** button to create a new Retention Report custom preset or to create a new one-off Retention Report.
- Click **Edit** to open and make changes to the selected preset. You can then save the updated preset and/or generate a new Retention Report, as needed.
- The **Delete** button can be used to delete one or more existing presets that are no longer needed. Select the target item(s) and click Delete to remove the preset(s) from the list.
- Click **View** to generate a Retention Report using the selected custom preset.
 - Note that multiple Retention Reports can be generated at one time, if preferred. This option allows you to view and compare data for different report parameters and different date ranges, as needed. [Learn more here.](#)
- Click the **Set as Default** button to make the selected item the default custom preset.
 - Once an item has been set as the default preset, its parameters will automatically load whenever you click the Add button to create a new preset or a one-off report. The pre-populated settings can then be adjusted as needed.
- Click a column heading to sort the list by that category; click the heading again to sort the list in reverse order (see Figure 1.3).

(Figure 1.3)



In the Retention Report Manager window, a new Retention Report can be generated from a pre-existing custom preset or from scratch.

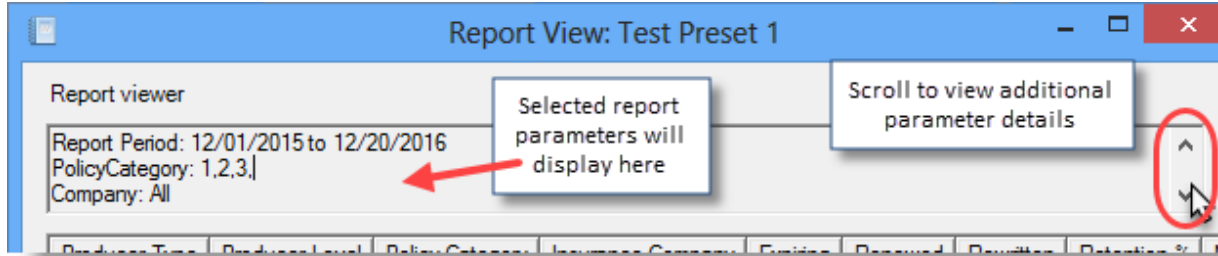
- To create a new Retention Report from a preset, select the target preset and click the **View** button. Set the date range, and click View to generate the report. [Get help here](#) with creating a new Retention Report from a preset.
- To create a new Retention Report from scratch (without using a preset), click the **Add** button, enter applicable report parameters, set the date range, and then click **View** to create the report. [Learn more here](#) about creating a Retention Report from scratch.

Once a Retention Report has been generated, report results will display in a new **Report View** window.

In the Report View window, please note the following:

- Applied report parameters will display in the upper area of the window (see Figure 1.4). Scroll in this section to view additional report parameters.

(Figure 1.4)

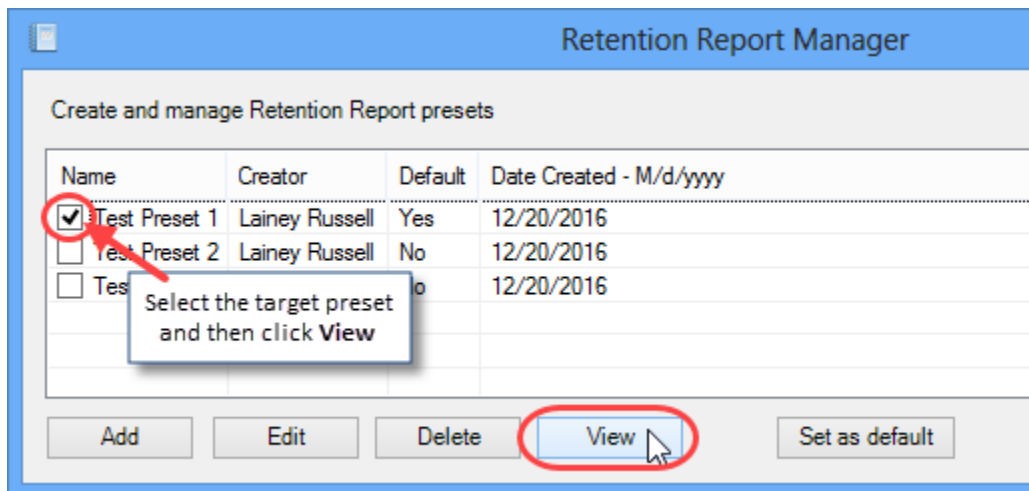


- Report results will display horizontally, with the selected parameters displayed in columns in the order selected in the **Report Hierarchy** section in the Retention Report Preset form.
 - Following the selected columns, additional report details will display, including *Expiring Count*, *Renewed Count*, *Rewritten Count*, *Retention %*, *New Business Policies Count*, *Other New Policies Count*, and *Policy Count* (note that *Policy Count* = *Renewed Count* + *Rewritten Count* + *New Business Policies Count* + *Other New Policies Count*).
- The Report View window can be minimized at any time to set it aside while doing follow-on inquiries or reports or other work. (This applies for one or multiple Report View windows.)
- To export a copy of the report results to Microsoft Excel for additional use and analysis, click the **Export** button in the Report View window.
 - In the Excel file, the preset name will display at the top of the report, and report parameters will display at the bottom of the report.

Create a Retention Report with a Custom Preset

To create a new Retention Report from a pre-existing custom preset, select the target preset in the Retention Report Manager window, and then click the **View** button (see Figure 1.5).

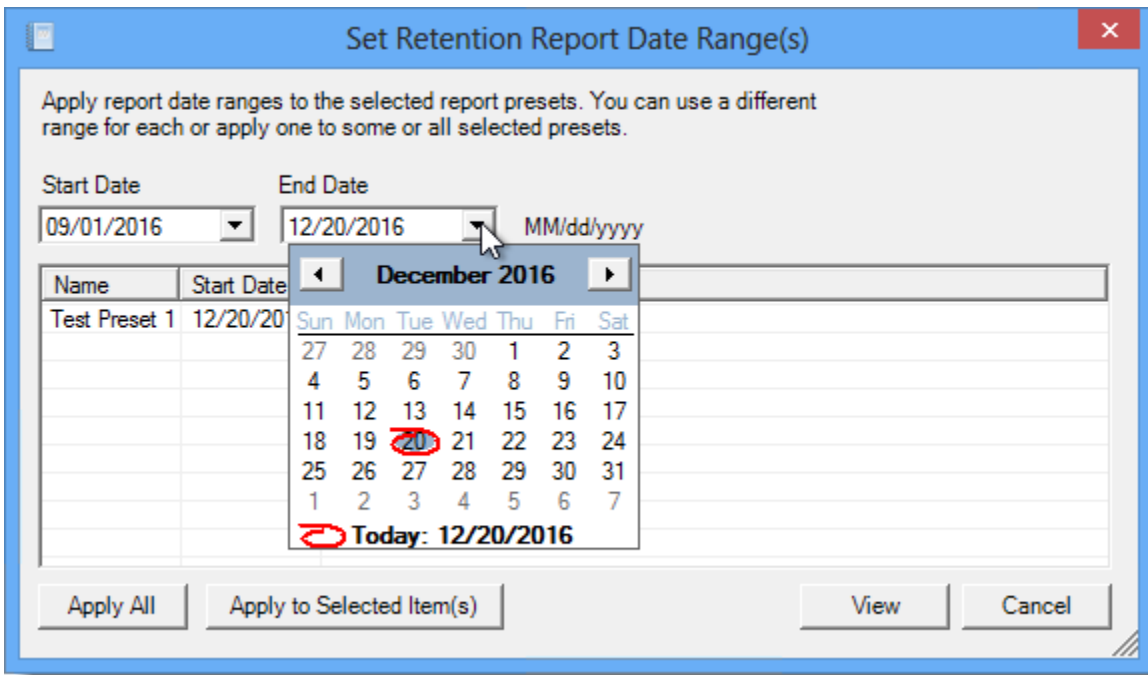
(Figure 1.5)



In the **Set Retention Report Date Range(s)** window that displays,

- a. Select/enter the appropriate **Start Date** and **End Date** (see Figure 1.6).
- b. Click the **Apply All** button to apply this date range to the preset.

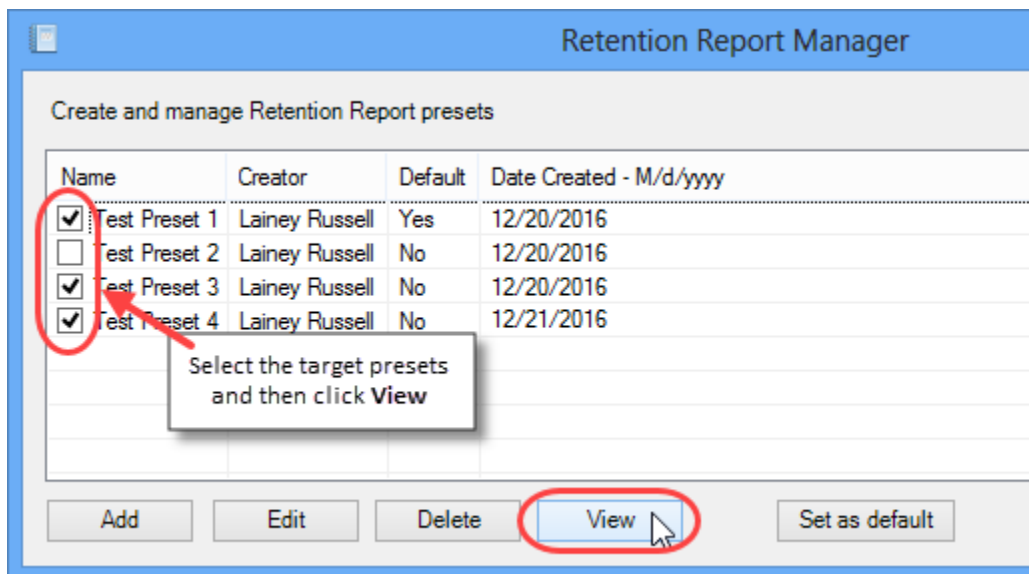
- c. Click **View** to generate the report and view report results in the Report View window.
(Figure 1.6)



Create Multiple Retention Reports at One Time with Presets

To create multiple Retention Reports at one time from pre-existing custom presets, select the target presets in the Retention Report Manager window, and then click the **View** button (see Figure 1.7).

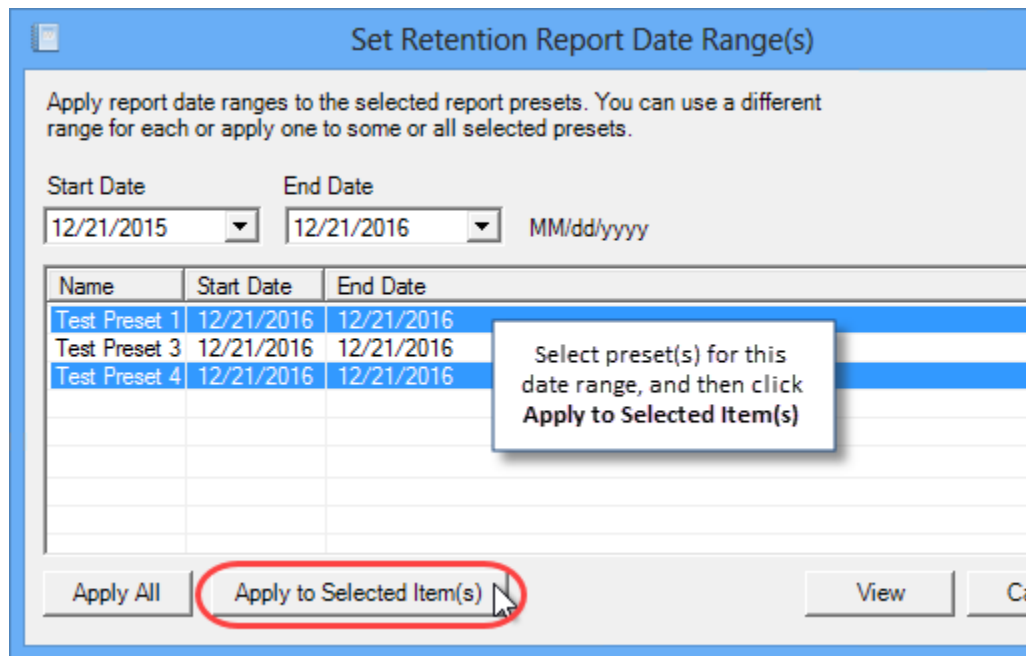
(Figure 1.7)



In the **Set Retention Report Date Range(s)** window that displays, apply the appropriate date range(s) to the presets.

- To apply the same date range to all of the presets, select/enter a **Start Date** and **End Date**, and then click the **Apply All** button to apply this date range to all presets.
- To apply different date ranges for one or more presets,
 - a. Select/enter a **Start Date** and **End Date** for the target preset(s).
 - b. Select the target preset(s) for this date range.
 - Use Shift+click to select multiple sequential items; use Ctrl+click to select multiple non-sequential items.
 - c. Click the **Apply to Selected Item(s)** button (see Figure 1.8).

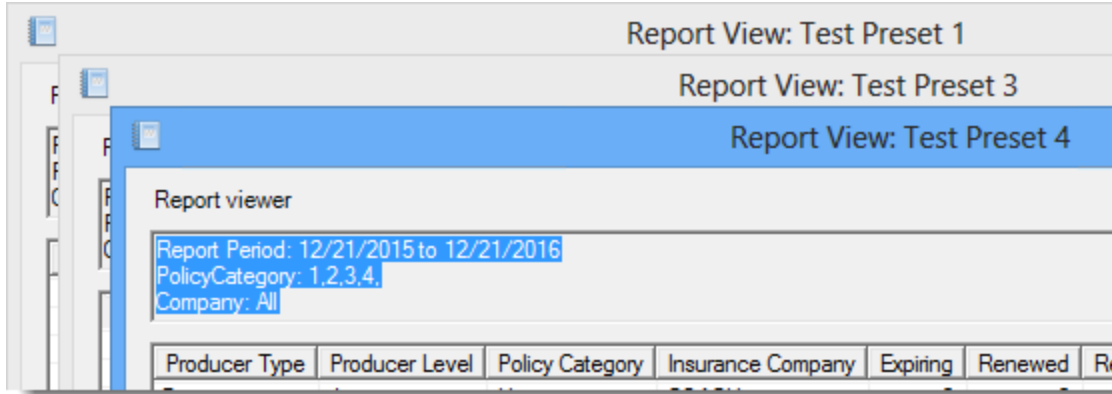
(Figure 1.8)



- d. Repeat steps a through c to apply other date range(s) to other preset(s), as needed.

When you are ready to generate the reports, click **View**. The reports will display, each in its own **Report View** window, allowing you to view and compare the reports as needed (see Figure 1.9). Note that any or all Report View windows can be minimized at any time to set them aside while doing follow-on inquiries or reports or other work.

(Figure 1.9)



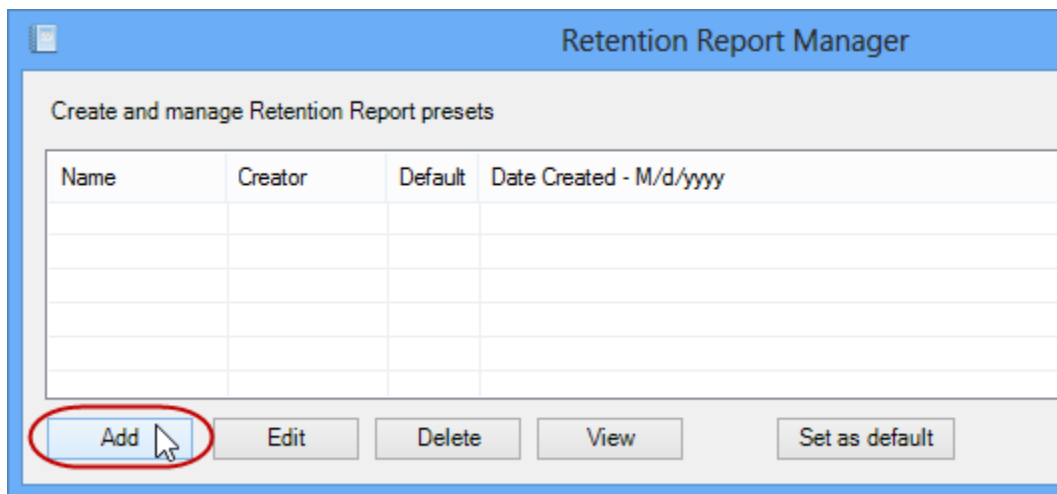
Create a Retention Report from Scratch / Create a New Custom Preset

Follow these steps when...

- You want to create a one-off Retention Report (without using a preset) **or**
- You want to create a new custom preset.

Click the **Add** button in the Retention Report Manager window (see Figure 1.10).

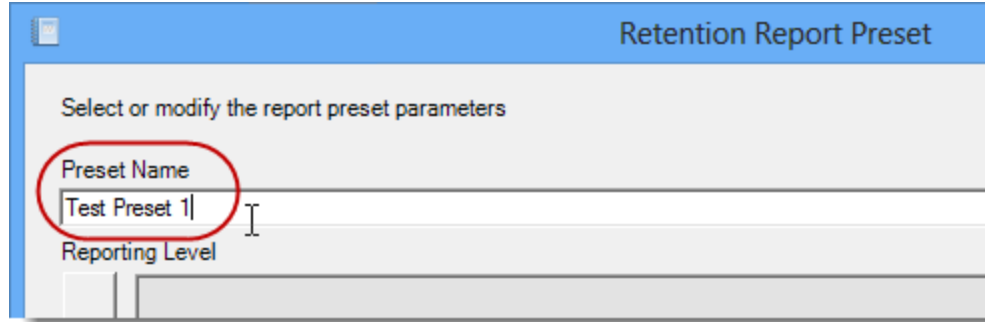
(Figure 1.10)




In the **Retention Report Preset** form, specify report details and parameters as follows.

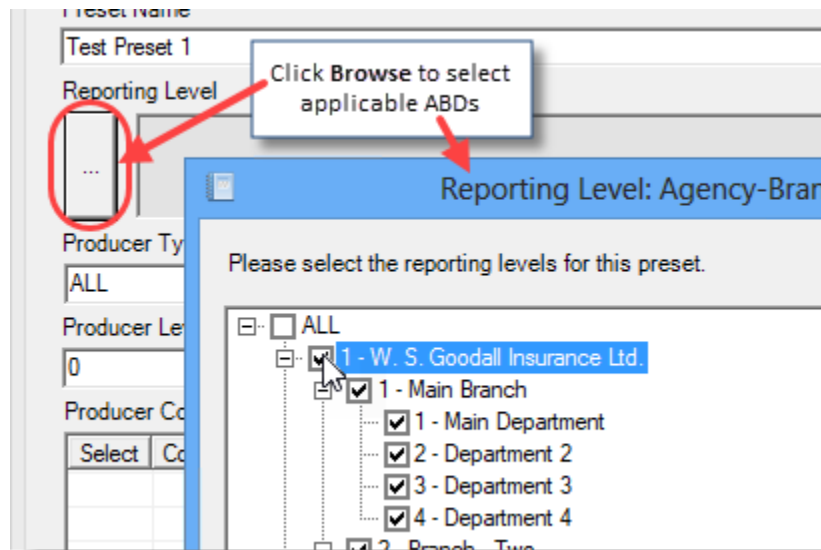
- First, enter a descriptive name for this report in the **Preset Name** field (see Figure 1.11).

(Figure 1.11)



- b. To select the applicable Reporting Level(s), click the **Browse**  button to open the **Reporting Level** window and select the ABDs (Agencies/Branches/Departments) to include in the report (see Figure 1.12).
- The selected levels will be listed in the Reporting Level field. To modify these selections at any time, click the **Browse** button and make required adjustments.

(Figure 1.12)



- c. Then, select additional information to include in the report.
- You can select/include all or only target items in each section.
 - To select all items in a section or group, click in the first checkbox to select it, press and hold the Shift key on your keyboard, and then click in the last checkbox.
 - Similarly, to deselect all items in a section or group, deselect the first checkbox, press and hold the Shift key on your keyboard, and then deselect the last checkbox.
 - **Note:** For Policy Category, Sub Broker, Company, and Class of Business, **making no selection in these categories will generate the report with an assumption of ALL items selected.**
 - If Producers are included in filtering and reporting, the applicable **Producer Type**, **Level**, and/or **Code** can be selected (see Figure 1.13).

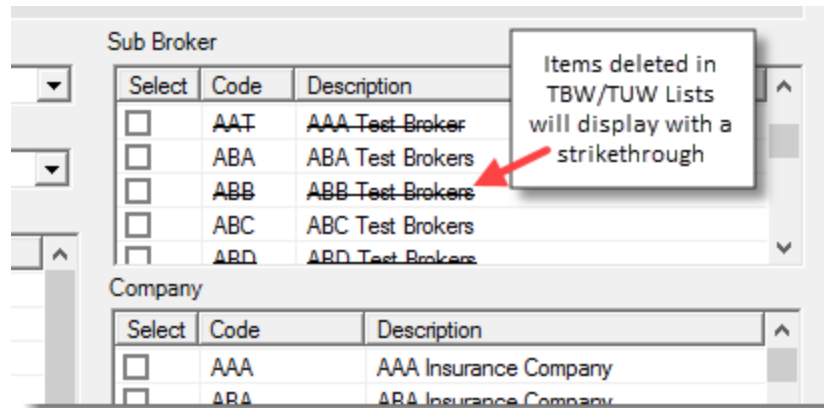
(Figure 1.13)

- Filtering of Producers is based on the Client folder producer assignment for that type and level.
- When “**All**” producers are selected, any folders with no producer will be counted and grouped as “Unassigned.”
- To select all **Producer Types**, choose “ALL” in the dropdown menu; to select all **Producer Levels**, select “0” in the dropdown menu (see Figure 1.14).

(Figure 1.14)

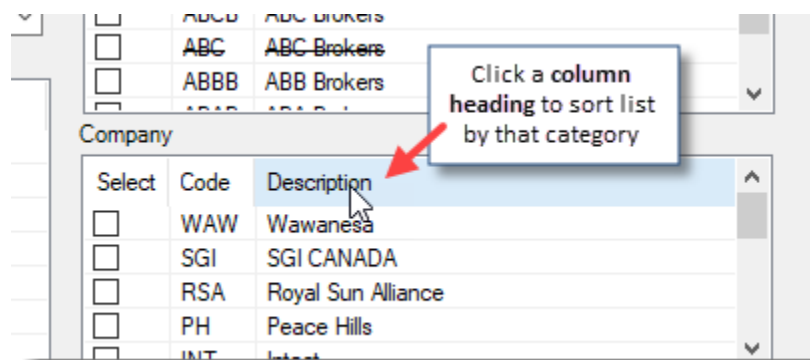
- Any items that have been deleted in TBW/TUW Lists will display with a strikethrough (see Figure 1.15) but can still be included as needed in report filtering.

(Figure 1.15)



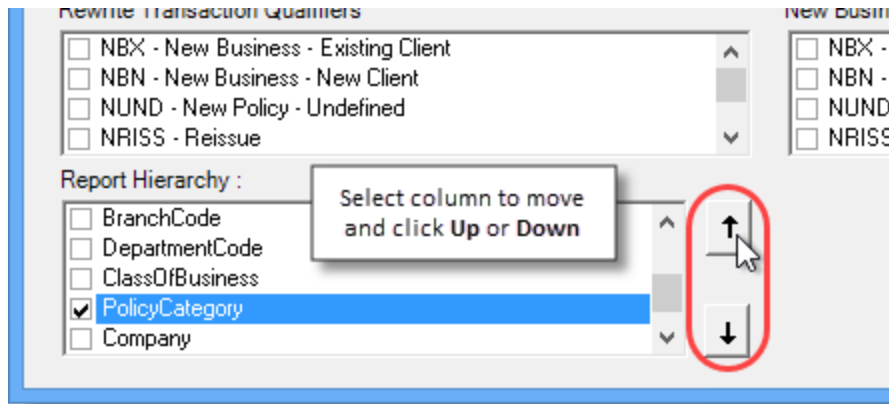
- Producer Code, Sub Broker, and Company sections can be sorted by column heading if required. Click a column heading (*Select, Code, or Description*) to sort the list by that category; click the heading again to sort the list in reverse order (see Figure 1.16).

(Figure 1.16)



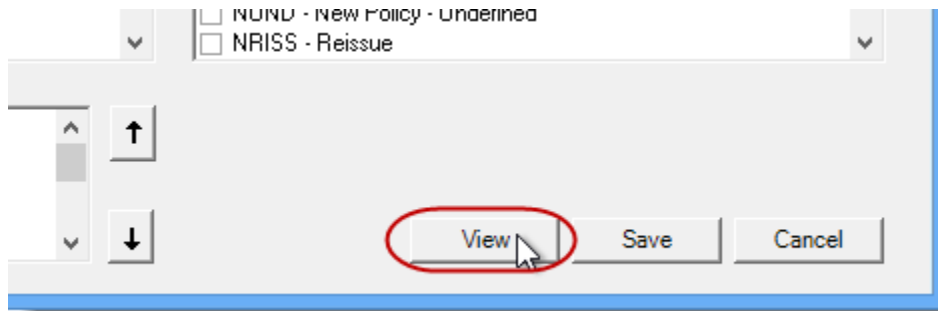
- Note that **TQs** (Transaction Qualifiers) can be selected as report parameters.
 - Please remember, accurate TQ assignment to policy transactions is important in determining new business and rewrite counts.
- In the **Report Hierarchy** section, select columns to include in the report.
 - Note that report columns will display in the order listed in the Report Hierarchy section. To modify the presentation order of report columns, select the column to be moved, and then click the **Up** or **Down** button until the list is arranged as you would like (see Figure 1.17).

(Figure 1.17)



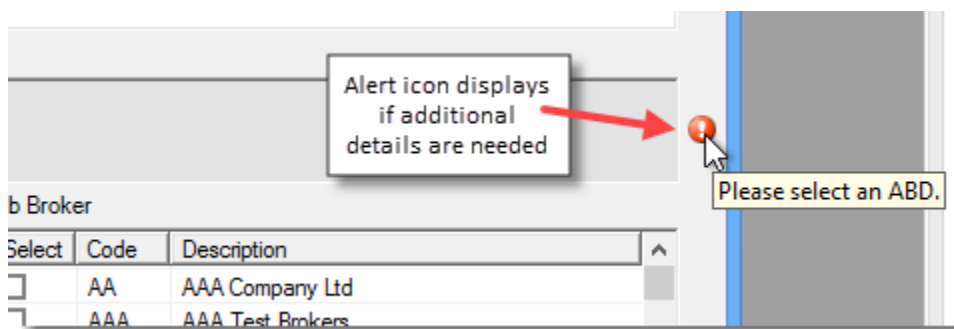
When all report parameters have been entered, click the **View** button to generate the one-off Retention Report (see Figure 1.18) or click **Save** to save this preset for later use.

(Figure 1.18)



- A reminder prompt will display if any additional parameters are required. Hover your mouse over the alert icon for additional information about the required parameter (see Figure 1.19).

(Figure 1.19)



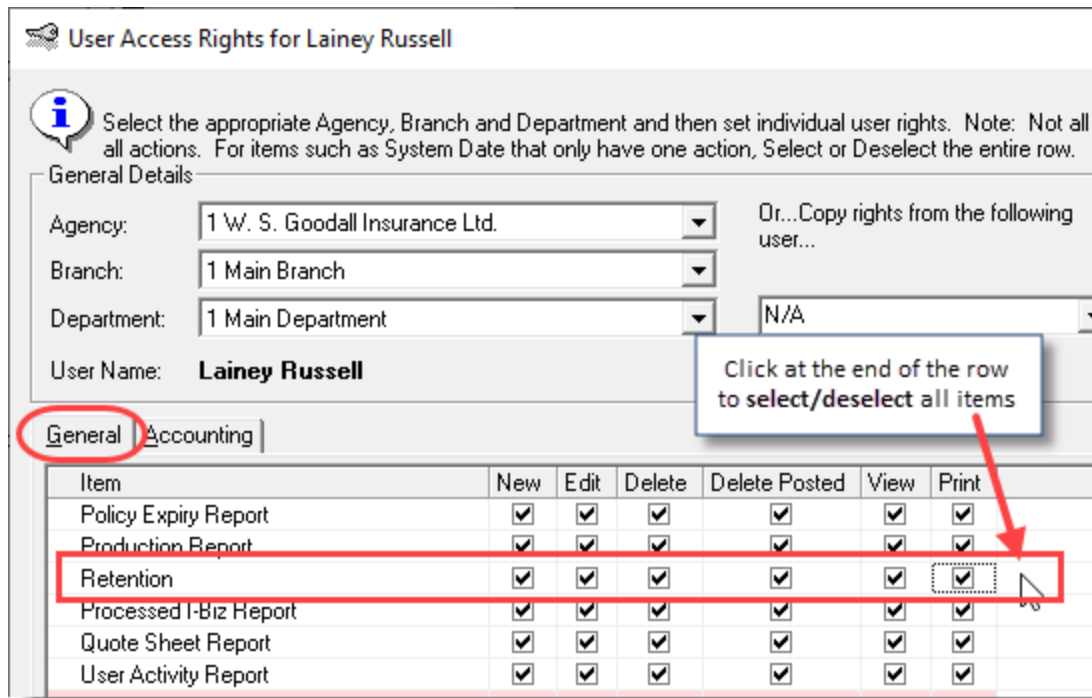
If you are generating a one-off Retention Report, the **Set Retention Report Date Range(s)** window will display so you can set the date range:

- Select/enter the appropriate **Start Date** and **End Date**.
- Click the **Apply All** button to apply this date range to the report.
- Click **View** to generate the report and view the newly created report in the Report View window.

User Rights for the Retention Report

Please note, the Retention Report is managed by User Rights (through *Tools, Administrative, User Manager, Rights*). In the User Access Rights window, Retention Report User Rights are found on the **General** tab in the **Reports** section (see Figure 1.20).

(Figure 1.20)



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2. New Motorcycle Body Types in Vehicle Details

In the Auto IntelliQuote, several new motorcycle body types are available for selection in Vehicle Details, including *Entry Naked Sport*, *Entry Sport*, *Naked Super Sport/Roadster*, *Standard Sidecar*, and *Super Sport*.

When you are entering details for a motorcycle in a new or existing Auto IQ, make the applicable selection in the **Body Type** drop-down menu in the Vehicle Details step/tab (see Figure 2.1).

(Figure 2.1)

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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,

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