

3 May 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. [Continuously Insured Since Date Field Always Editable](#) – The Continuously Insured Since date field can now be edited at any time, regardless of whether auto policy history has been entered for the person.

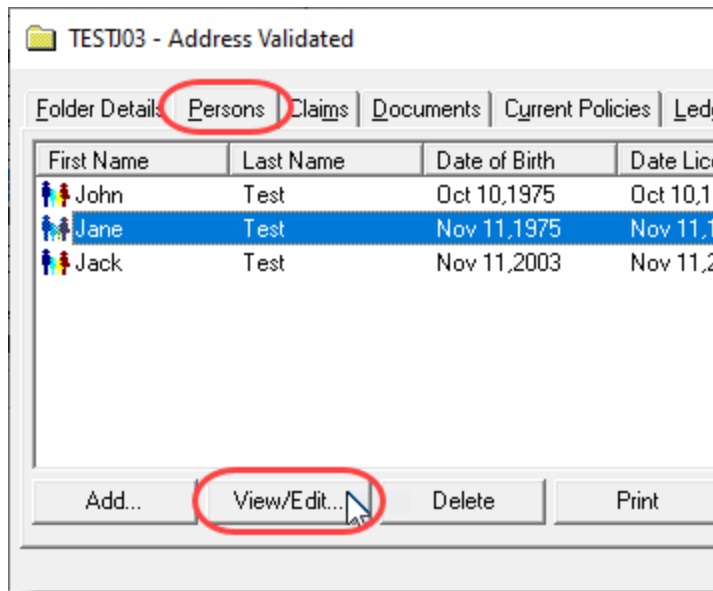
1. Continuously Insured Since Date Field Always Editable

Previously, the Continuously Insured Since date field on the Drivers Policy History tab in Personal Details could be edited only if no policy history had been entered. As auto policy history was added, the Continuously Insured Since date field updated automatically, showing the oldest Inception Date in read-only format.

Now, the date you enter in the Continuously Insured Since date field can be edited at any time, regardless of whether auto policy history is added for the person.

To view the Continuously Insured Since date field, open Folder Details and select the **Persons** tab. Select the person and click the **View/Edit** button (see Figure 1.1).

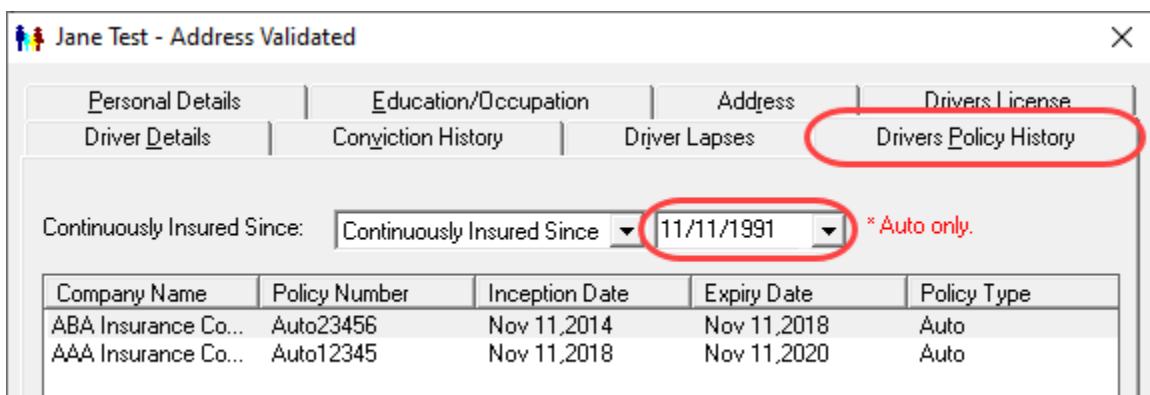
(Figure 1.1)



On the **Drivers Policy History** tab in Personal Details, the Continuously Insured Since date field is found at the top of the tab (see Figure 1.2). The date entered in this field can now be changed at any time as needed.

- **Note:** The Continuously Insured Since date will no longer be updated automatically as policy history is entered. Please ensure the appropriate date has been entered manually in this field.

(Figure 1.2)



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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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