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CSSI Newsletter

Issue 4 - Autumn 2011

As the leaves change colour and fall and a blanket of snow is soon to arrive, the change of seasons reminds us of the constant change not only our product experiences but also our Industry. Please check out the newsletter to find out what is happening with the new features, enhancements, and press releases, and in the news. As always, we are looking for content, so send us something you might think our fellow brokers and industry people might find interesting.

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President's Message

The last month has been busy with the fall convention run in the Maritimes, Saskatchewan, and Manitoba. One of the hot topics that we continued to hear from Brokers and Companies in our travels was "Electronic Document Transfer" (EDocs). Basically, this is the ability to transmit documents seamlessly and electronically with our trading partners using CSIO standards. Documents can include appraisals, certificates, photos, etc..., but the one item that seems to have a huge impact as far as time savings and eliminating paper is the download of the Dec page. CSSI is pleased to say that we are capable of handling EDocs and prepared to work with any of our partner Insurance Companies to provide this to our Brokers. As you can see from the "In the News" section, we are in the final testing stages of the functionality with SGI CANADA, SGI CANADA Insurance Services Ltd., Coachman, and ICPEI. We encourage our Brokers to discuss this with their Insurance Companies.

Scott Andrew, President and CEO, CSSI

What's New

Client Services

Information about our Client Services Team... [More](#)

User Group Reports

Find out what's new with the Ontario TBW User Group... [More](#)

Sales & Marketing

The Sales Team at CSSI is pleased to report continued growth through both our broker signings and company projects... [More](#)

Development

Our Development Team has been very busy working on IntelliQuote, TBW Desktop, New Business Upload, EDocs, Accounting, Commercial, and TUV projects. [More](#)

Release Update

New Releases

Recent updates to TBW/TUV include One-Off Payees, Void Cheques, and Mass Cheque Printing. The inbuilt Help feature has also been updated and enhanced... [More](#)

Upcoming Releases

Soon-to-be-released features include Auto Transact and Batch Transacting of downloaded policies, Broker Group AR Statements (TUV), TUV/FX Edition, and more... [More](#)

Product Updates

View details about our many recent product updates on the *Updates* page on our website ... [More](#)

Industry News

Broker-controlled link to customer critical to warding off competition *(InsuranceWest, September 2011)*

"There is an online business transition to a full-serve, self-serve customer environment happening across the broker landscape. Direct writers and banks are aggressively pushing forward and expanding their platforms to link with clients online... [Read the article](#)

Custom Software Solutions Inc. *(The CSIO Standard, October 2011)*

"Custom Software Solutions Inc. (CSSI) has had a busy 3rd quarter of 2011 with a number of projects underway that include the recent integration announcements for New Business Upload with **The Dominion** and **JEVCO** using CSIO XML 4.3... [Read the article](#)

Press Releases

New Business Upload Agreement announced by The Dominion and CSSI

"CSSI and The Dominion of Canada General Insurance Company are pleased to announce they have entered into a connectivity agreement for New Business Upload from CSSI's The Broker's Workstation (TBW) and also its standalone rating and underwriting tool, IntelliQuote (IQ)...." [More](#)

CSSI Products now integrated with Merit Insurance Premium Financing

"CSSI and Merit Insurance Premium Financing are pleased to announce they have entered into a connectivity agreement which sees CSSI's The Broker's Workstation (TBW), and stand alone rating and underwriting system, IntelliQuote (IQ) integrate with Merit's online Broker financing system..." [More](#)



Upcoming Training

Our online broker training sessions will be offered on the following dates:

- ✧ **NOVEMBER 8 - 10, 2011**
- ✧ **DECEMBER 6 - 8, 2011**
- ✧ **JANUARY 2012 - TBA**

Please contact us at training@cssionline.com for more information or to register for training.

Available Training Sessions

- Get Started with The Broker's Workstation
- Get Working with Property Insurance
- Get Working with Auto Insurance
- Accounting Administration
- Accounting on The Broker's Desktop
- Accounting on The Accountant's Desktop

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