

CSSI Newsletter

Issue 2 - Spring 2011

Our first edition of the quarterly CSSI Newsletter was very well received, and we appreciate all of the positive comments! Please continue to forward comments and suggestions to us at info@cssionline.com.

In this edition

[President's Message](#)
[What's New](#)
[Release Update](#)
[Industry News](#)
[Press Releases](#)
[Upcoming Events](#)
[Upcoming Training](#)

President's Message

The IBAC automation initiative on policy change is the most promising broker connectivity project I have been witness to in my 20 years in the insurance business. We support this initiative and are actively promoting and developing to support the end goals of the initiative. All Broker Management System (BMS) vendors in Canada have been part of this process from the onset of the initiative. Great competitive cooperation facilitated by IBAC.

Using the IBAC principles and the CSIO standards, we (CSSI) will be delivering a working model of real-time transactions, including but not limited to new, renewal, cancellation, and endorsement transactions, started in the BMS and ending in the BMS, this summer with our first insurer! Stay tuned – more to come.

IBAC has a number of companies committed to this project and the vision of start and end in your BMS. The foundation of this initiative is sound. Your IT departments (BMS Vendors) have been included since the beginning and, with that positive start to the project, now we need to bring in more of our insurer business partners until we have them all! This ever elusive objective is in our grasp, finally.

Scott Andrew, President and CEO, CSSI

What's New

Client Services

Information about and how to contact our Client Services Team... [More](#)

User Group Reports

Find out what's new with the Saskatchewan 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](#)
[CHECK OUT OUR NEW AD!](#)

Development

Our Development Team has been very busy this spring working on IntelliQuote, TBW Desktop, I-Biz, Accounting, Commercial, and TUW projects. [More](#)

Release Update

New Releases

Recent updates to TBW/ TUW include premium finance facilities, enhancements to the Claims File feature, and the ability to override commission rules for selected companies only as required. [More](#)

Upcoming Releases

Soon-to-be-released features include a rate comparison for selected insurance companies in a policy document, the ability to create and print multiple Pink Cards, and automated company AR & AP reconciliations. [More](#)

Product Updates

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

Industry News

Functionality Fundamentals *(Canadian Insurance, February 2011)*

"While researching various broker management systems (BMS) and talking to vendors and end users, a common theme emerged - a BMS, just like any other technology, relies on the knowledge and ability of the end user..." [More](#)

BMS Breakdown *(Canadian Insurance, February 2011)*

"At the heart of every brokerage is the broker management system (BMS), and these days, advances in technology allow it to do more than just collect client data and track correspondence..." [More](#)

Full-Serve, Self-Serve *(Canadian Underwriter, February 2011)*

"In the future, online broker services need to be offered in a full-serve, self-serve environment, in a system that brokers own and control. Over the past few years, people have been talking about the need for brokers to embrace the "new" social media. Facebook, Twitter, and LinkedIn are rapidly growing services, and we will find..." [More](#)

Press Releases

CSSI welcomes Account Manager Donna Johnson

"Custom Software Solutions is pleased to announce the hiring of Donna Johnson as Account Manager for the BC region...." [More](#)

Upcoming Events

The CSSI Executive and Sales Team will be attending the following upcoming events:

MAY 15 - 18, 2011

[IBAA Broker Convention](#) in Jasper, Alberta

JUNE 1 - 3, 2011

[IBABC Broker Convention](#) in Banff, Alberta



Upcoming Training

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

✧ **MAY 10 - 12, 2011**

✧ **JUNE 7 - 9, 2011**

✧ **JULY 5 - 7, 2011**

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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