CSSI Newsletter

Issue 3 - Summer 2011

We hope everyone is having a good summer and that you find the time to enjoy a few vacation days. Please continue to forward comments and suggestions about our newsletter, as well as anything you might think is newsworthy for our family of CSSI clients, to us at info@cssionline.com.

President's Message

Summer is in full swing and I hope everyone finds time to enjoy some down time to recharge.

At CSSI, we are busy this summer on a number of initiatives, one of which is building a usable online presence for brokers. In "Full-Serve, Self-Serve" in *Canadian Underwriter,* February 2011 (included in our Issue 2 newsletter) and in an upcoming article in *Insurance West,* I discuss the importance of brokers having the ability to service clients online. At CSSI, we have identified that a natural extension of our suite of Broker products is an online product that we are calling I-Client.

We are in the process of working with a focus group of existing brokers helping to identify all the required functionality and the order of delivery. CSSI has already identified much of this functionality and is well on the way to delivering the first components by leveraging the work we have completed on our I-Company suite.

Stay tuned for updates on this exciting new product. Please have a good remainder of the summer!

Scott Andrew, President and CEO, CSSI

What's New

Client Services

Information about and how to contact our Client Services Team… **More**

Sales & Marketing

The Sales Team is upbeat with the many new features that have been released or are scheduled to be released soon… **More**

CHECK OUT OUR NEW AD!

Development

Our Development Team has been very busy this summer working on IntelliQuote, TBW Desktop, I-Biz, Accounting, Commercial, and TUW projects. **More**

Release Update

New Releases

Recent updates to TBW include automated SGI CANADA Broker AR/AP Statement Reconciliations. **More**

Upcoming Releases

Soon-to-be-released features include a Batch Transacting system, the Bank Account Control feature, Mass Cheque Printing, Void Cheques, One-Off Payees, Broker Group AR Statements, and more. **More**

Product Updates

View details about our many recent product updates on the *Updates* page on our website … **More**

Industry News

Man on a Mission *(The Alberta Broker, June – July 2011)*

This article, written by Annette Hubick and published in the June – July 2011 edition of *The Alberta Broker*, features Dean Bailey, the current IBAA President and TBW user. We thought you might find the article of interest. **Read the article**

Press Releases

CSSI announces Automated SGI CANADA Broker AR/AP Statement Reconciliations in TBW

"Custom Software Solutions is pleased to announce the release of automated SGI CANADA Broker AR/AP Statement Reconciliations in its Broker's Workstation (TBW) product...." **More**

CSSI and JEVCO announce Connectivity Project

"Custom Software Solutions Inc. and JEVCO Insurance Company are pleased to announce they have entered into a connectivity agreement for New Business Upload..." **More**

Upcoming Events

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

OCTOBER 5 – 6, 2011

[IBANB/IBANS Convention Trade Show](#) in Saint John, NB

OCTOBER 13 – 15, 2011

[IBAS Convention Trade Show](#) in Saskatoon, SK

OCTOBER 19 – 21, 2011

[IBAO Convention Trade Show](#) in Toronto, ON

Upcoming Training

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

- ✧ **SEPTEMBER 13 – 15, 2011**
- ✧ **OCTOBER 12 – 14, 2011**
- ✧ **NOVEMBER 8 – 10, 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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