

CSSI Newsletter

Issue 5 – Winter 2012

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It is hard to believe one year has gone by since we published our first edition of the newsletter. Over the course of the year and four publications, we have received nothing but positive comments and feedback. As always, we want to have your input, so please pass along comments, feedback, and newsworthy content.

President's Message

In the last couple of editions of the newsletter and in articles for industry publications, I have written about initiatives such as the IBAC Data Exchange project, ORBiT, and CSIO EDocs. These positive industry initiatives need the support of all of the stakeholders in the broker distribution chain. If you are a broker, you need to be communicating to your carrier companies to support these initiatives. More importantly, you need to communicate to your companies that they need to support all of the vendors in their efforts to embrace and implement these important initiatives. All of the vendors need support from carriers so that these initiatives reach the maximum number of brokers, regardless of the management system they use. It then becomes important that, as a broker, you align with a progressive software vendor that is willing to work with and, in many cases, improve these initiatives for the betterment of the broker distribution system.

Scott Andrew, President and CEO, CSSI

What's New

Client Services

For our latest FAQ and information about our Client Services Team...

[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, and TUV projects.

[More](#)

Release Update

New Releases

Recent updates to TBW/TUV include enhancements to the Expiry Report ...

[More](#)

Upcoming Releases

Soon-to-be-released features include a comprehensive claims management system (TUV), TBW and TUV FX Edition, Right Click: About for EFT users, and more...

[More](#)

Product Updates

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

... [More](#)

Industry News

IBAO applauds new technology allowing PDF Dec pages to be downloaded as part of CSIO standards (*CIP Society Advantage Daily, November 18, 2011*)

"The Insurance Brokers Association of Ontario (IBAO) has publicly recognized the recent introduction by Custom Software Solutions Inc. (CSSI) of new technology that enables PDF Dec pages to be accepted as part of the Centre for Study of Insurance Operations (CSIO) download standards..." [Read the article](#)



Time to embrace consumer facing technology (*Manitoba Insurance Broker, December 2011*)

"Over the last year there have been some promising projects and initiatives that focus on improving the efficiencies in the broker distribution model. The IBAC automation initiative, using the IBAC real-time principles and the CSIO standards, will be delivering..." [Read the article](#)

Insurer-Broker Data Exchange Project move to Phase III (*Top Canadian Insurance Broker*)

"The Insurance Broker's Association of Canada (IBAC) has successfully completed Phase II of its Data Exchange Project. The Centre for Study of Insurance Operations (CSIO) has reviewed and approved electronic messages submitted by two insurers..." [Read the article](#)

Press Releases

Ontario Brokers Association supports CSSI's New Technology (*Insurance Brokers Association of Ontario, November 18, 2011*)

"Today, the Insurance Brokers Association of Ontario (IBAO) applaud Custom Software Solutions Inc. (CSSI) on its recent introduction of new technology that enables PDF Dec pages to be accepted as part of the Center for Study of Insurance Operations (CSIO) download standards..." [Read the article](#)

Custom Software Solutions announces EDocs Functionality with SGI

"Custom Software Solutions (CSSI) is pleased to announce the addition of Electronic Document Transfer (EDocs) functionality with SGI CANADA, SGI CANADA Insurance Services Ltd., Coachman, and ICPEI. EDocs is the ability to transmit documents seamlessly and electronically...." [More](#)

Upcoming Training

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

- ✧ FEBRUARY 14 - 16, 2012
- ✧ MARCH 13 - 15, 2012
- ✧ APRIL 11 - 13, 2012

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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