

CSSI Newsletter

Issue 12 – Autumn 2013

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As we approach both the first day of winter and Christmas, we would like to take this opportunity to send to you from all of us at Custom Software Solutions our warmest Season's Greetings and sincerest wish that the coming year will bring you peace, good health, good cheer, and much prosperity.

As you enjoy the closeness of friends and the comfort of home and family during the holidays, we will be doing the same! Please note our hours of operation during the holiday season will be adjusted as follows:

December 24 and 31 – Closed at 2:00 p.m. CST
December 25 and 26 and January 1 – Closed

President's Message

One of the best parts of welcoming a new year is remembering and celebrating relationships and successes of the past year. During this most festive of seasons, we all join in saying "thank you" and wishing your entire organization the happiest of holidays.

Scott Andrew, President and CEO, CSSI

What's New

Client Services

The Old Policy Entry Form and Folder Notes are no longer supported, so please call us if you need to upgrade. You'll find more information, plus other important reminders from Client Services [here](#).

Sales & Marketing

The Sales & Marketing Team is excited about the great response to the launch of our online quoting tool, I-Company integrations, and the growing list of companies offering eDoc capabilities... [More](#)

Release Update

New Releases

Recent updates to TBW/TUW include the ability to sort the Documents list in Folder Details by date, clear identification of cancelled and lapsed policy trees in the Documents list, and more. [Get Details...](#)

Upcoming Releases

Soon-to-be-released features include the TBW/TUW Budget system, a custom income statement and budget report, strengthened and optimized reports, and more... [More](#)

Product Updates

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

Out & About with CSSI



IBAO Convention

L-R: Bill Murray, Chris Kennedy, Robert Eslinger



User Group Meeting

L-R: Jessica Bevenborn, Tom Bevenborn, Brian Reeds, Jamie Martyn

Industry News

Custom Software Solutions: Update on consumer facing technology and real time initiatives
(Manitoba Insurance Broker, Winter 2013)

“Over the last few years in various publications Custom Software Solutions Inc. (CSSI) has been promoting two initiatives that we feel are important to the Independent Broker distribution channel – consumer facing technology and real time...” [Read the article](#)

First phase launched of I-Client online offering (Insurancewest, September 2013)

“With the growing movement in the insurance industry to online services, Custom Software Solutions Inc. has been actively developing modules for its broker and mga management software...” [Read the article](#)

Upcoming Training

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

- ✧ **JANUARY 14 & 16, 2014**
- ✧ **FEBRUARY 11 & 13, 2014**
- ✧ **MARCH 2014 – 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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