

# The Broker's Workstation

INTEGRATED MANAGEMENT SYSTEM

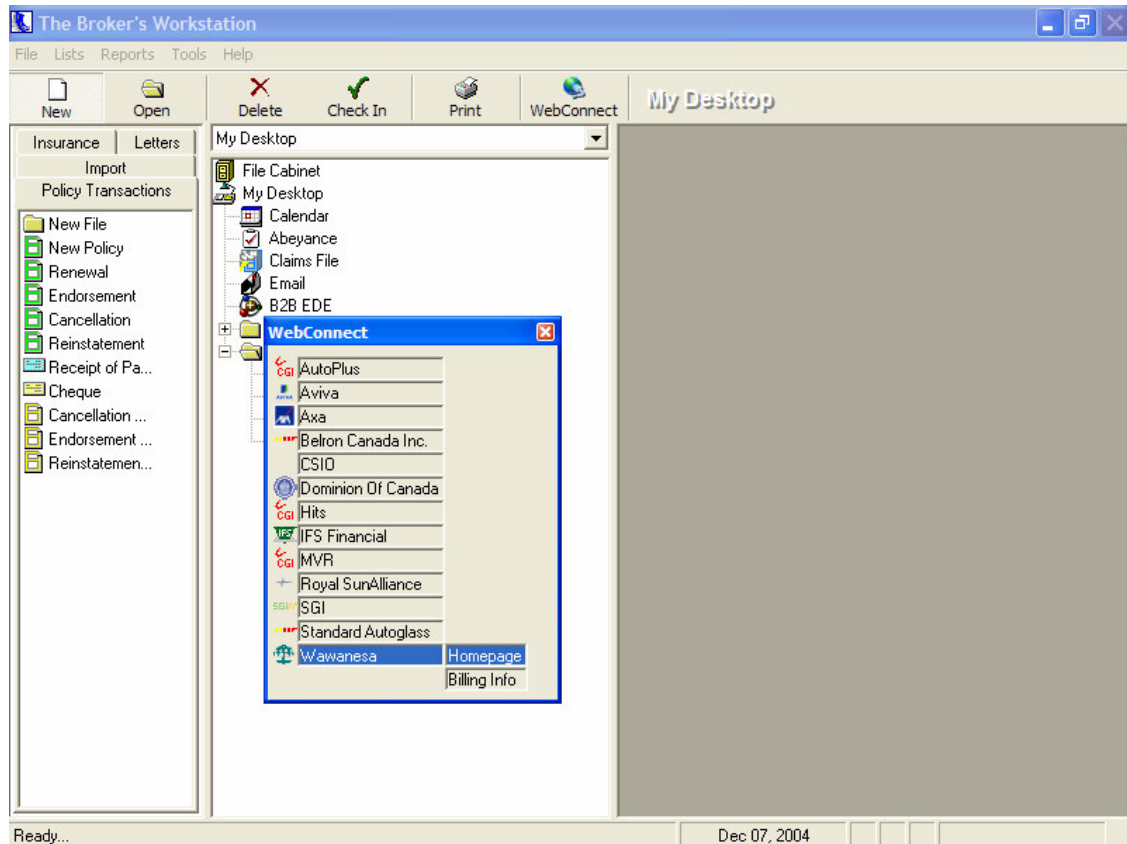
December 13, 2004

To: The Broker's Workstation Users

Dear Valued Client:

## Re: The Broker's Workstation – Important Releases and Changes

Custom Software Solutions is pleased to report the release of the following new upgrade to its **WebConnect** tool within The Broker's Workstation (TBW). When a user clicks on the WebConnect icon on the main tool bar a floating WebConnect toolbar is launched. This floating toolbar has all of the active websites a user may access directly from TBW. By simply clicking the link a user is taken directly to the website and integration with that site varies by the particular company you are launching, your user rights, and the task you would like to complete.



**Custom Software**  
SOLUTIONS INC.

297 Nelson St. W. P.O. Box 639 Virden, MB, R0M 2C0  
Tel: 204-748-4800, 1-888-291-3588 Fax: 204-748-4806  
www.cssionline.com

The following is a list of companies currently active on the WebConnect. A brief description of the level of integration with the company is included.

- CGI's Autoplus, MVR, and Hits:
  - This allows a user to do a claims lookup using Hits or Autoplus depending on the type of policy and a convictions lookup using MVR. When a lookup is done on an IQ or an application, it will pull all the information required through from TBW and populate the webpage for you. TBW marks the IQ or application as having had a lookup completed. (Brokers will have to arrange for their own username and passwords through the appropriate insurance carrier)
- IFS Financial Services Inc.:
  - For brokers who finance policies with IFS this WebConnect allows the user to perform an account lookup or quick quote on a client folder name in TBW. It also allows the user to take a current policy or application document within TBW and do a "Contract Generator". This takes the user to the IFS site and populates the required information from the TBW document into the IFS page for the user to confirm. Once confirmed the user presses the "Generate" button and a PDF of the IFS contract is completed. The user can switch back to TBW and they will be presented with a popup asking them if they want to save the IFS PDF contract file. Click yes and the PDF is imported into TBW.
- Wawanesa:
  - This allows the broker to access Wawanesa's billing inquiry website. If it's launched from a policy document the fields are pre-populated in the website.
- CSIO:
  - This allows access to online forms.
- SGI:
  - This allows access to online forms.
- Belron Canada
  - This allows direct access to Belron's Home Page
- Standard Auto Glass
  - This allows direct access to Standard Auto Glass's Home Page
- AXA
  - This allows direct access to AXA's Home Page
- Aviva
  - This allows direct access to Aviva's Home Page
- DofC
  - This allows direct access to DofC's Home Page
- Royal and SunAlliance
  - This allows direct access to R&SA Home Page

All of the above mentioned WebConnect sites also include a link to the home page.

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If there are other websites that you feel there is value in integrating with please contact us and we will work with you and the company

Please run the TBW Remote Update Utility to access these changes. For assistance in using these new features, please contact our Support Team at 1-888-291-3588.

Please share this information with all TBW users in your office(s) and thank you for using TBW.

Yours truly,

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