



5 November 2010

**To: The Broker's Workstation Users**

Dear Valued Client:

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

Custom Software Solutions Inc. (CSSI) is pleased to announce the release of the following enhancements to **The Broker's Workstation (TBW)**:


### *Contents*

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1. [Expanded Integration Services to SGI Canada's Websites](#) – Integration services to SGI Canada's websites through the WebConnect feature now include Dec Page inquiries and Manual Endorsements.

## **1. Expanded Integration Services to SGI Canada's Websites**

We are pleased to announce that integration services to SGI Canada's websites through the WebConnect tool now include Dec Page inquiries and Manual Endorsements.

The WebConnect feature allows the TBW user to access various insurance company and service bureau websites quickly and easily directly from the TBW interface. Click the **WebConnect**  button on the TBW toolbar to view the list of available companies and services in the WebConnect window.

The following WebConnect items have been updated:

- **SGI Canada:** Clicking the SGI Canada WebConnect link now provides access to Manual Endorsement (Saskatchewan only) and Dec Page inquiries, as well as the Homepage, AutoFund, and Billing, Policy, and Claims inquiries (see Figure 1.1).

(Figure 1.1)

Uptimum Insurance	
Pacific Marine	
Portage Mutual	
<b>SGI Canada</b>	Homepage
Standard Autoglass	AutoFund
Trafalgar Insurance	SGI Manual Endorsement
Travel Insurance Coordinators	SGI Billing Inquiry
Trillium Mutual	SGI Dec Page Inquiry
Wawanesa	SGI Policy Inquiry
	SGI Claims Inquiry

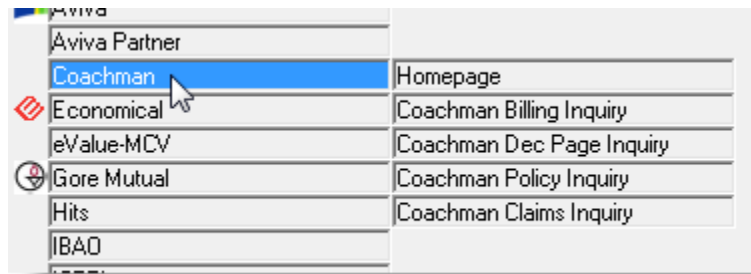
- **ICPEI:** The ICPEI (Insurance Company of Prince Edward Island) link in WebConnect now provides access to a Dec Page inquiry, as well as links to the Homepage and Billing, Policy, and Claims inquiries pages (see Figure 1.2).

(Figure 1.2)

Hits	
IBAO	
<b>ICPEI</b>	Homepage
IFS Financial	ICPEI Billing Inquiry
Insurance Bureau of Canada	ICPEI Dec Page Inquiry
Intact Insurance	ICPEI Policy Inquiry
Merit Insurance Premium Financing	ICPEI Claims Inquiry
MVR	
North West...	

- **Coachman:** The Coachman Insurance Company link in WebConnect has been enhanced to provide access to a Dec Page Inquiry, in addition to the Coachman Homepage and Billing, Policy, and Claims Inquiry pages (see Figure 1.3).

(Figure 1.3)



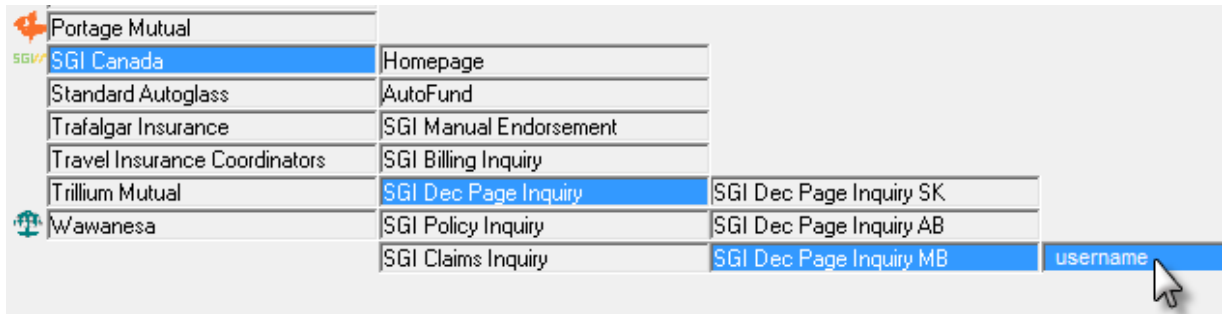
To set up the WebConnect feature for use, click **Tools, Options, WebConnect**. In the **WebConnect** window, select the target company, and then click the **Setup** button. In the **WebConnect Setup** window, select the appropriate User and Agency/Branch/Department, choose the Site, and then enter the **Username** and **Password** (see Figure 1.4). Click **Save**.

(Figure 1.4)



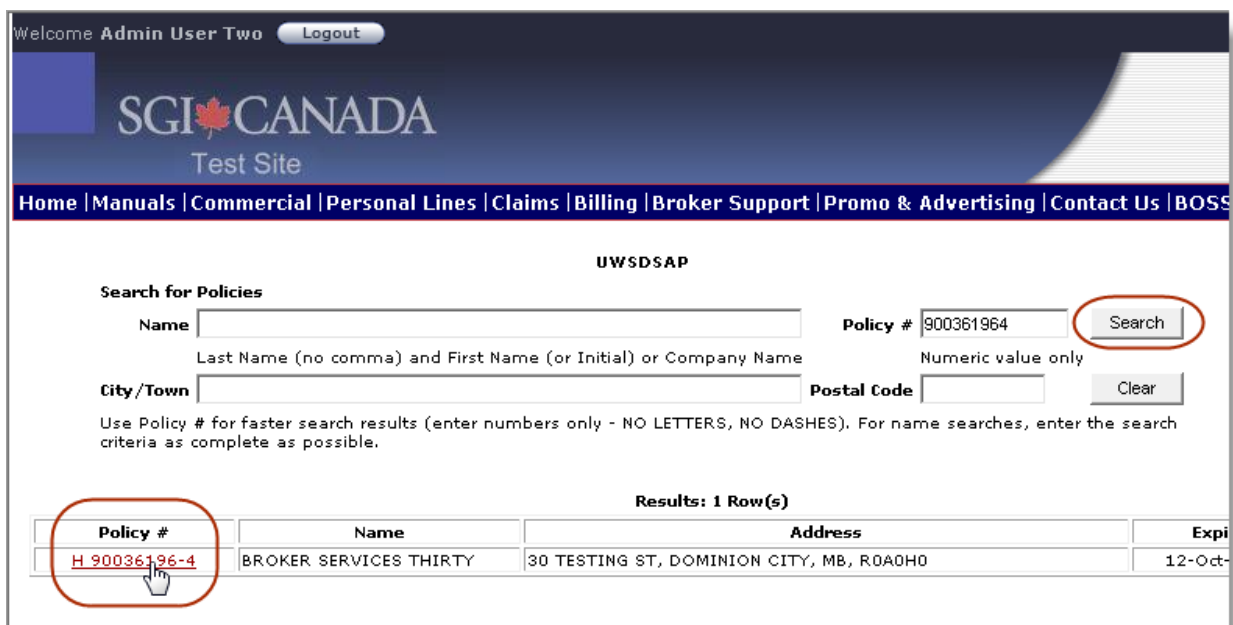
Once WebConnect has been set up, click the WebConnect button on the TBW toolbar to open the WebConnect window. Select the Company, inquiry type, and Username (see Figure 1.5).

(Figure 1.5)



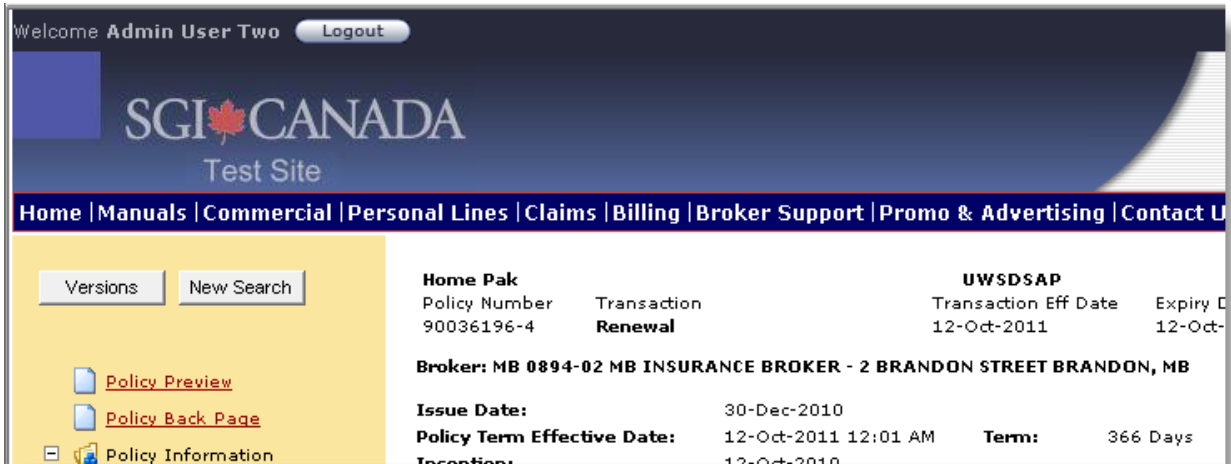
The SGI Search page will display in the Document window. Enter search details, and click the **Search** button. Click the target **Result** in the list that appears (see Figure 1.6).


(Figure 1.6)



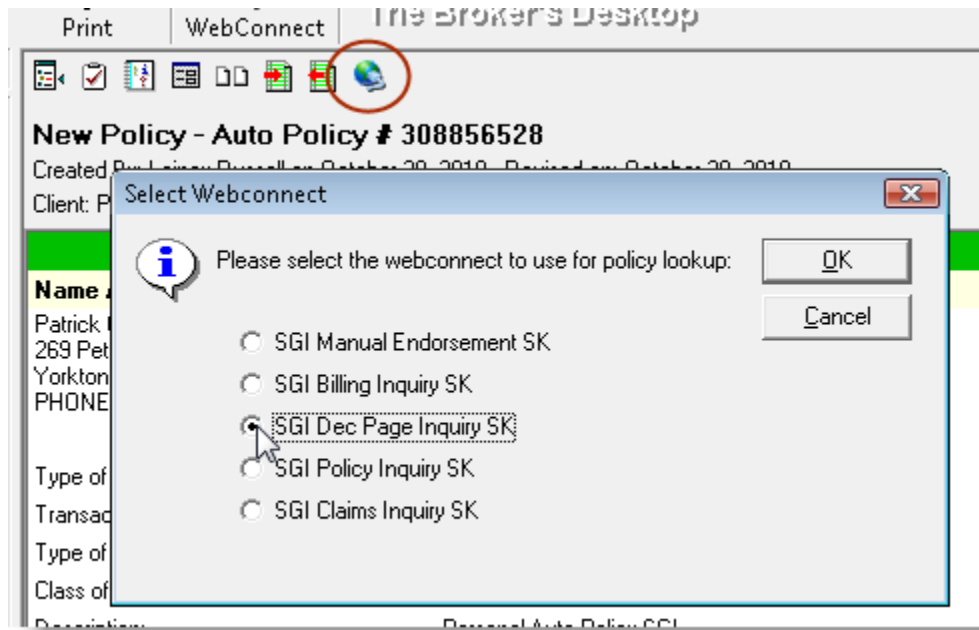
Transaction options will appear. Click the target **Transaction Type**, and transaction details will display in the Document window (see Figure 1.7).


(Figure 1.7)



The WebConnect feature can also be accessed directly from a Policy document. Double-click a Policy document in the Desktop Tree to view it in the Document window. Click the **WebConnect**  button on the document toolbar, select the inquiry in the **Select WebConnect** dialog, and then click **OK** (see Figure 1.8). Transaction details will display in the Document window.

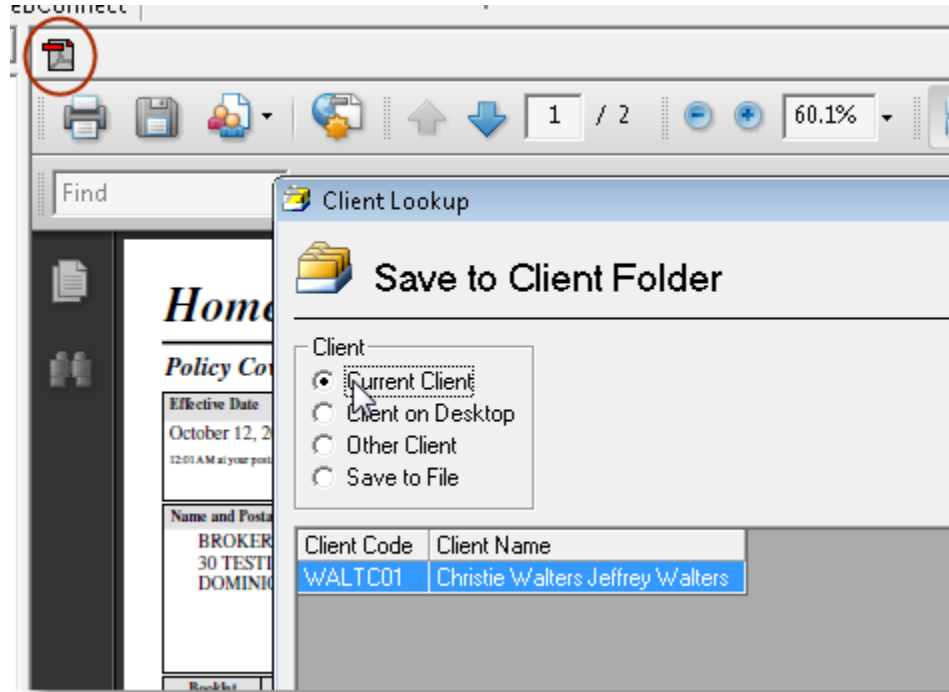
(Figure 1.8)



When viewing a Dec Page, click the **PDF**  button in the upper left corner of the document to persist and save the Dec Page. In the **Client Lookup** dialog that opens, select to save the Dec Page to

the client folder, to another client folder, or to another location on your computer (see Figure 1.9). Enter additional requested details (if required), and then click **OK**.

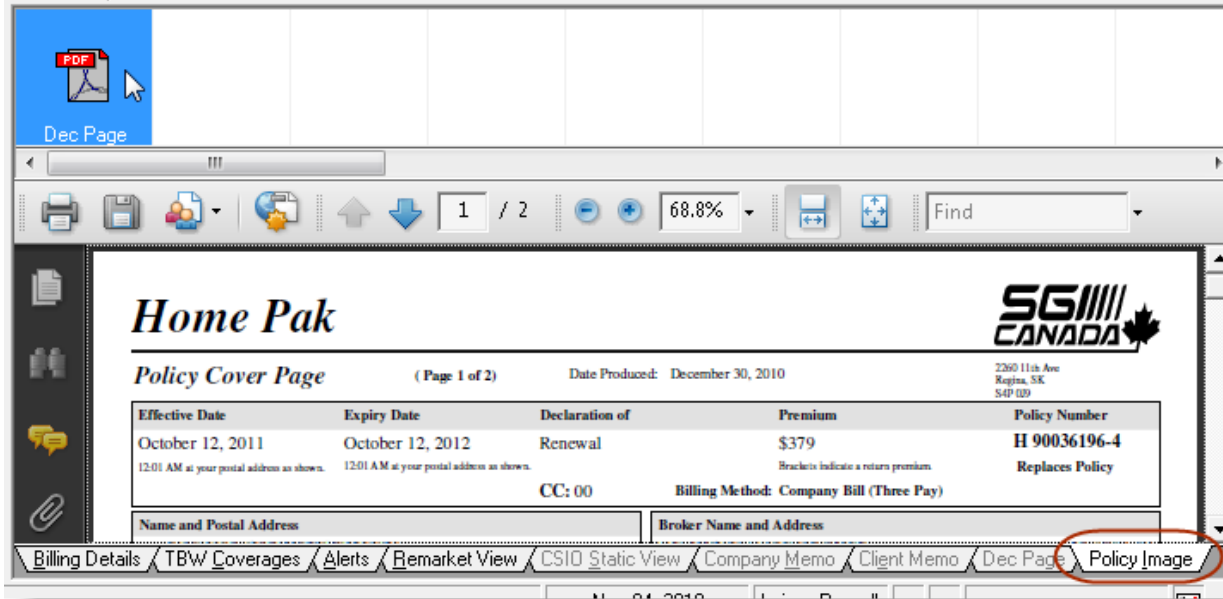
(Figure 1.9)



If the Dec Page will be saved to a client folder, enter a descriptive Name for the document in the **Get Doc Name** window, and then click **OK**. In the **Print** window, check that **Amyuni PDF Converter** is selected under **Printer Name**, and click **OK**. The PDF document will be saved to the selected client folder.

- Note that a Dec Page saved to a client folder can be attached to a Policy document and viewed on the **Policy Image** tab (see Figure 1.10). To attach the persisted Dec Page to a Policy document, drag and drop the Dec Page onto the Policy document on the Documents tab in Folder Details.

(Figure 1.10)



If **Save to File** was selected in the Client Lookup window (see Figure 1.9), click the **Browse**  button. In the **Save As** dialog, select the location where the Dec Page will be saved, enter a **File Name** for the Dec Page, and then click **Save**. Click **OK** in the Client Lookup window. In the **Print** dialog, check that **Amyuni PDF Converter** is selected under **Printer Name**, and click **OK**. The PDF document will be saved to the selected location.

Please note that access to TBW's WebConnect feature is controlled by **User Rights** (Tools, Administrative, User Manager, Rights).

*Please contact Client Services at 1-888-291-3588 (toll-free telephone) for assistance in setting up this feature.*

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Please share this information with the appropriate TBW users in your office(s). Once you have reviewed this document, if you have any questions regarding this enhancement, or need further assistance in its usage, please contact our Client Services Team at [clientservices@cssionline.com](mailto:clientservices@cssionline.com) (email) or 1-888-291-3588 (toll-free telephone).

Thank you for using **The Broker's Workstation**.

Yours sincerely,

Custom Software Solutions Inc.

