



2 June 2010

To: The Broker's Workstation Users

Dear Valued Client:

Re: The Broker's Workstation – Broker Training Sessions

Custom Software Solutions Inc. (CSSI) is pleased to announce that **online interactive training for *The Broker's Workstation*** (TBW) is now available to our clients.

These live, interactive, hands-on training sessions are offered each month over the Internet by our professional trainer, Brian Hitchlock. Current training modules include the following:

- **Get Started with The Broker's Workstation:** Whether you are a first-time user of TBW, or an experienced user wanting a fresh look at the program, this two-hour module will prepare you to use TBW to complete your daily tasks with confidence. *Please note that this overview session is a prerequisite for subsequent training modules.*
- **Get Working with Personal Lines Property Insurance using TBW:** Targeted at both new and experienced users of The Broker's Workstation, this two-hour training module will show you how to use the program effectively and efficiently for personal lines habitational insurance.
- **Get Working with Personal Lines Auto Insurance using TBW:** Customized for our clients in provinces with private auto, this class will lead you through rating and writing auto insurance with The Broker's Workstation. Whether you are a brand-new user or are already familiar with TBW, join us for this two-hour session to see how the program can help you successfully and productively manage the auto insurance process.
- **Accounting Administration in The Broker's Workstation:** Designed specifically for those who are responsible for the administration of accounting in the broker's office, this class will show you how to configure, administer, and manage the accounting component of The Broker's Workstation.

- **Get Working with Accounting on The Broker's Desktop:** If you work with billings, reversals and adjustments, and receipts in your brokerage, this two-hour training module will prepare you to complete these tasks with ease using The Broker's Workstation. You will also expand your skills in working with TBW's Cash Drawer system.
- **Get Working with Accounting on The Accountant's Desktop:** Also intended for those who complete accounting tasks in the brokerage, this module will focus exclusively on client accounts receivables, insurer and producer payables, bank reconciliation, and direct bill reconciliation. Whether you are a new or experienced TBW user, plan to join us for this two-hour session to hone these specific skills.

All TBW users, whether new or experienced, are welcome to participate in these training sessions. Training participants require only a telephone and a computer with a high-speed Internet connection.

Future plans for our Broker training include online self-serve training modules accessible 24 hours per day, 7 days a week, available on an annual-fee basis.

Our trainer, Brian Hitchlock, is also available for customizable onsite training, depending on your individual brokerage needs and requirements.

To register yourself and/or other TBW users for an upcoming training session, or with any questions you may have regarding our broker training, please contact us at training@cssionline.com (email) or 1-888-291-3588 (toll-free telephone). You can also visit our website (www.cssionline.com/training.htm) to view a schedule of upcoming classes or to register for training.

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

Yours sincerely,

Custom Software Solutions Inc.

