



16 January 2013

To: Users of The Broker's Workstation and/or The Underwriter's Workstation

Dear Valued Client:

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

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

Contents

1. [TBW Now Offers SGI CANADA New Business Upload](#) - CSSI's The Broker's Workstation and IntelliQuote are now connected with SGI CANADA's new business upload web service.
2. [Upload Recreational Vehicle New Business Applications to Intact Savers](#) – New Business applications for recreational vehicles for Intact and Novex can now be uploaded directly to Intact Savers from the TBW window.
3. [Upload Jevco New Business Auto Applications to Intact Savers \(ON only\)](#) – New business auto applications quoted with Jevco will now upload to Intact Savers.

1. TBW Now Offers SGI CANADA New Business Upload!

CSSI's The Broker's Workstation and IntelliQuote are now connected with SGI CANADA's new business upload web service. This integration, which enables Saskatchewan brokers to upload personal lines habitational new business applications directly to SGI CANADA, allows for improved

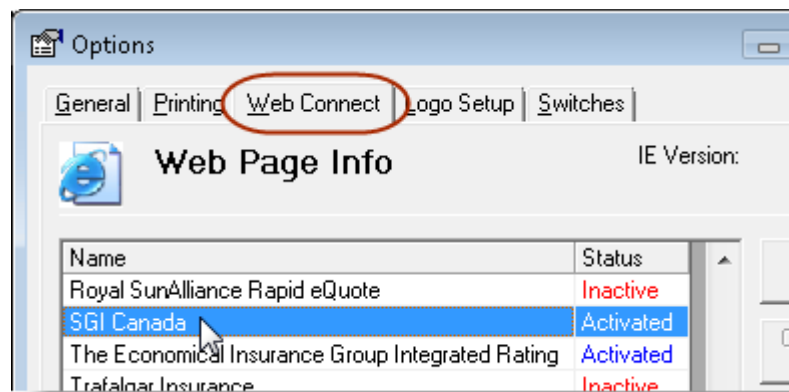
efficiencies company-wide and for SGI to optimize their partnerships with independent insurance brokers.

The following one-time setup must be completed in TBW for the SGI New Business Application Upload feature before the functionality can be used.

To set up the SGI New Business Upload feature in TBW,

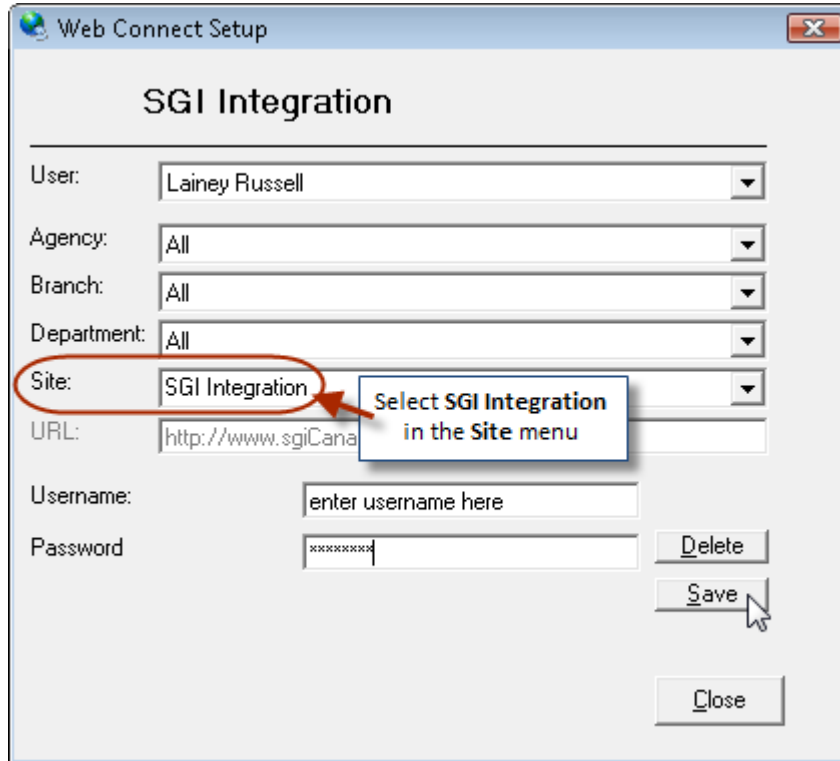
1. Ensure you have the required SGI Integration User ID and Password.
 - If you require a User ID and Password, please contact your SGI CANADA representative for assistance.
2. In the **TBW** window, click **Tools, Options**.
3. On the **WebConnect** tab in the **Options** dialog, find and double-click **SGI Canada** (see Figure 1.1).

(Figure 1.1)



4. In the **WebConnect Setup** dialog,
 - a. Select the applicable **User**.
 - b. Select All or the applicable **Agency/Branch/Department**.
 - c. Select **SGI Integration** in the **Site** menu.
 - d. Enter the appropriate **Username** and **Password**.
 - e. Click **Save** (see Figure 1.2).

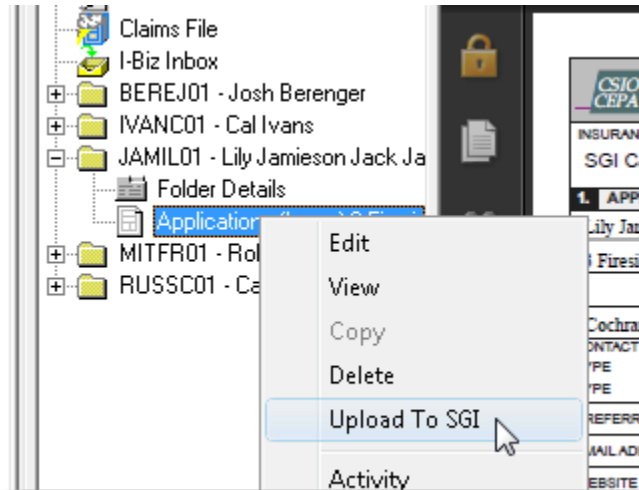
(Figure 1.2)



- f. Repeat these steps as required for additional Users for this feature.
 - g. Click **Close**.
5. Click **OK** in the **Options** dialog.
- *Be sure to update your WebConnect Setup details whenever you reset your Password.*

Once you have completed a home, tenant, or condo new business application for SGI, right-click the application document in the **Desktop Tree** in the TBW window, and select **Upload to SGI** (see Figure 1.3).

(Figure 1.3)



TBW will then launch a web browser window that will take you to the application page on the SGI website. Verify the details of the application, adding additional information if required. SGI will issue the policy from the information provided. If you are already set up to receive downloads from SGI, the policy will be sent to your CSIO email address. If you are not currently set up for SGI downloads, please contact Client Services for assistance with enabling this feature.

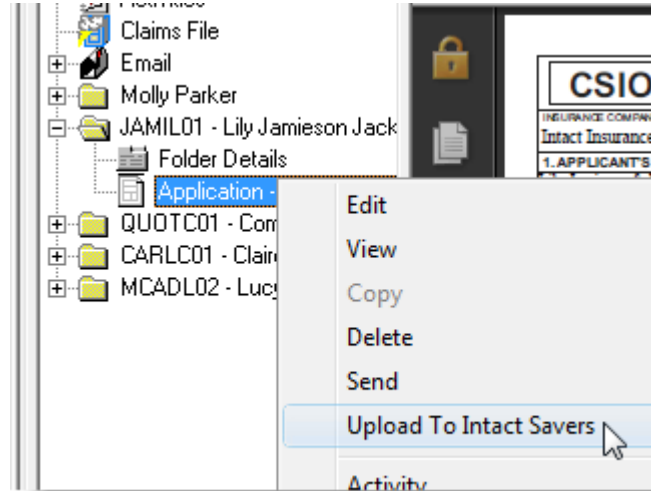
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2. Upload Recreational Vehicle New Business Applications to Intact Savers

New business applications for recreational vehicles for Intact and Novex can now be uploaded directly to Intact Savers from the TBW window.

Once you have completed a recreational vehicle new business application for Intact or Novex, simply right-click the document in the Desktop Tree in the TBW window, and select **Upload to Intact Savers** (see Figure 2.1).

(Figure 2.1)



TBW will then launch a web browser window that will take you directly to the application page on the Intact Savers website. Be sure to verify the details of the application before accepting. Intact will issue the policy from the information provided.

If you are already set up for Intact Savers upload, this functionality will be enabled automatically for you. If you are not currently set up for Intact Savers upload, please contact Client Services for assistance with enabling this feature.

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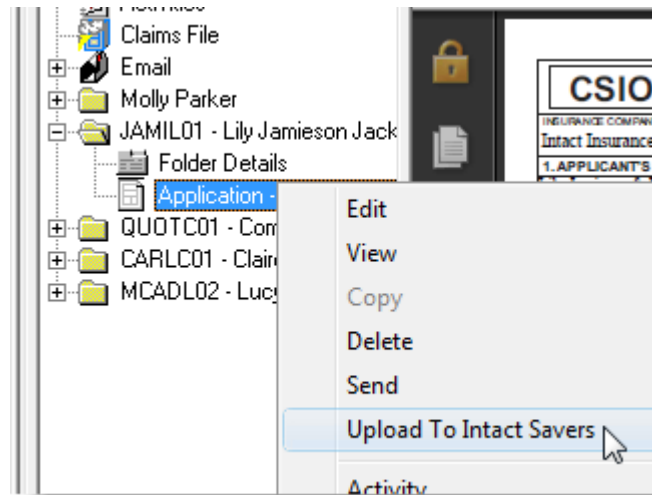
3. Upload Jevco New Business Auto Applications to Intact Savers (ON only)

New business private passenger vehicle auto applications quoted with Jevco will now upload to Intact Savers.

- Please note that Jevco upload is now only available in Ontario. Effective January 1, 2013, quoting of Jevco in Alberta is no longer supported.

Once you have created a Jevco Auto IntelliQuote (IQ), drag and drop the Application icon from the Tray onto the IQ in the Desktop Tree, and complete the application in the usual manner. Right-click the completed new business application in the Desktop Tree, and select **Upload to Intact Savers** (see Figure 3.1).

(Figure 3.1)



TBW will then launch a web browser window that will take you directly to the application page on the Intact Savers website. Be sure to verify the details of the application before accepting. Intact will issue the policy from the information provided.

If you are already set up for Intact Savers upload, this functionality will be enabled automatically for you. If you are not currently set up for Intact Savers upload, please contact Client Services for assistance with enabling this feature.

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

Thank you for using The Broker's Workstation and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.



Microsoft Partner

Gold Independent Software Vendor (ISV)