



18 April 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*

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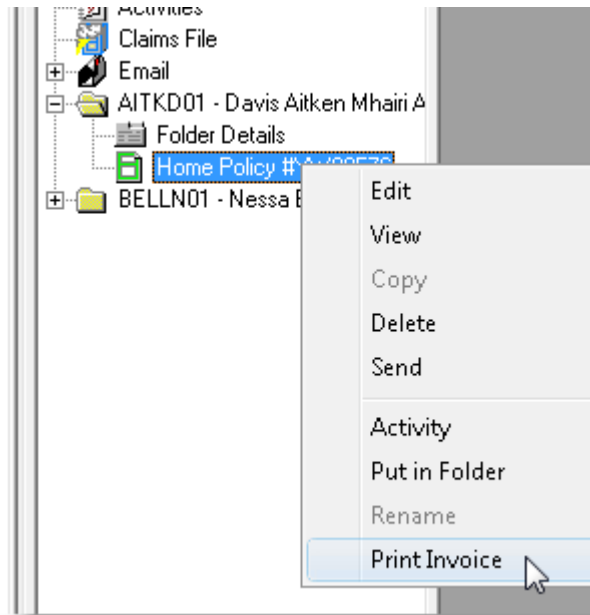
1. [Print Invoice from the Desktop Tree](#) – An invoice for a policy transaction can now be printed directly from the Desktop Tree, as required.
2. [TBW Now Offers Dominion New Business Upload](#) – CSSI's *The Broker's Workstation* and *IntelliQuote* are now connected with The Dominion's new business upload web service.

## **1. Print Invoice from the Desktop Tree**

A Client invoice for a policy transaction can be printed from the Ledger Card on the Client folder. Now, a Client invoice can also be printed directly from the Desktop Tree for manually created or transacted downloaded policy documents.

To print a Client invoice from the Desktop Tree, simply right-click the green policy document and select **Print Invoice** from the right-click menu (see Figure 1.1).

(Figure 1.1)



If the **Print Preview** feature is enabled (through **Tools, Options, Printing**), first preview and then print the invoice.

[Return to Contents](#)

## 2. TBW Now Offers Dominion New Business Upload

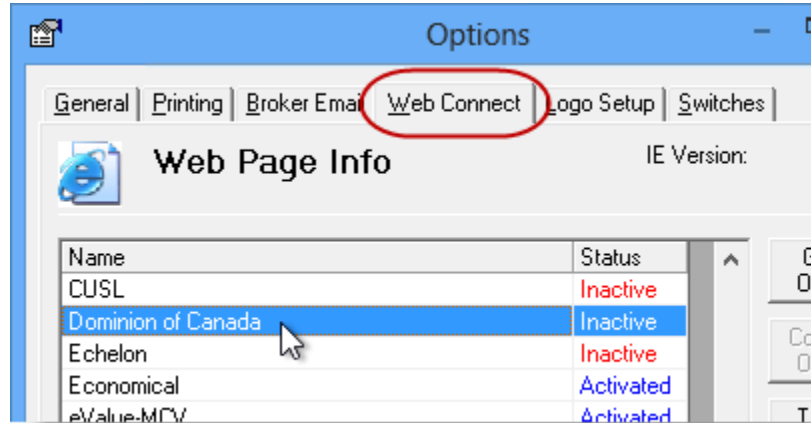
CSSI's *The Broker's Workstation* and *IntelliQuote* are now connected with The Dominion's new business upload web service. This integration allows brokers to upload both Personal Lines Automobile and Property new business policies in the various regions where The Dominion conducts business. This integration allows for improved efficiencies company-wide and for The Dominion to optimize their partnerships with independent insurance brokers.

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

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

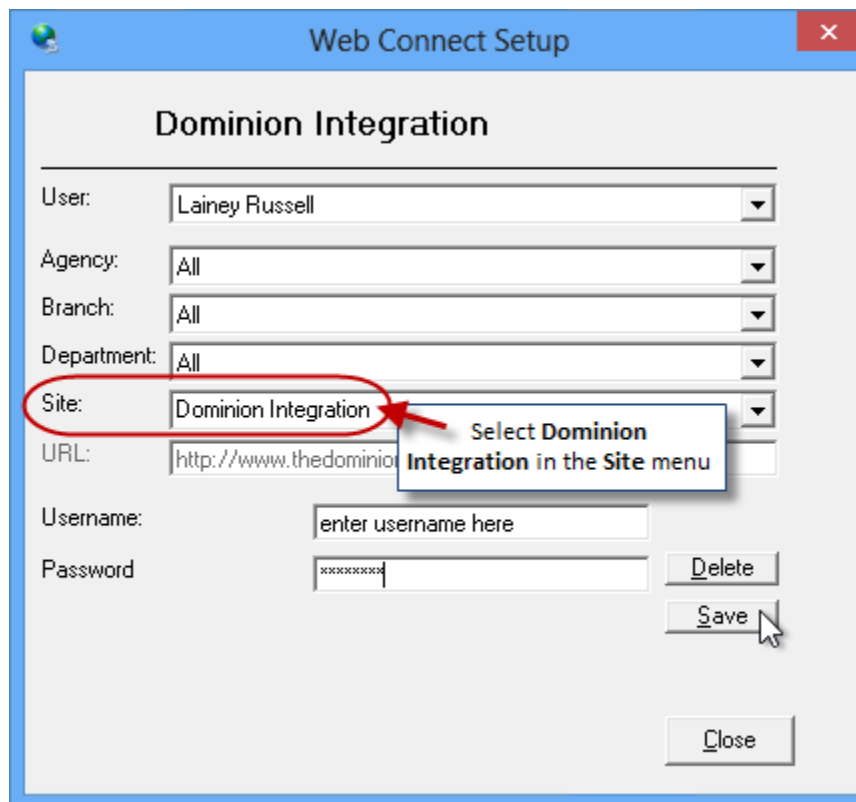
1. Ensure you have the required Dominion Integration User ID and Password.
  - If you require a User ID and Password, please contact your Dominion representative for assistance.
2. In the **TBW** window, click **Tools, Options**.
3. On the **WebConnect** tab in the **Options** dialog, find and double-click **Dominion of Canada** (see Figure 2.1).

(Figure 2.1)



4. In the **WebConnect Setup** dialog,
  - a. Select the applicable **User**.
  - b. Select All or the applicable **Agency/Branch/Department**.
  - c. Select **Dominion Integration** in the **Site** menu.
  - d. Enter the appropriate **Username** and **Password**.
  - e. Click **Save** (see Figure 2.2).

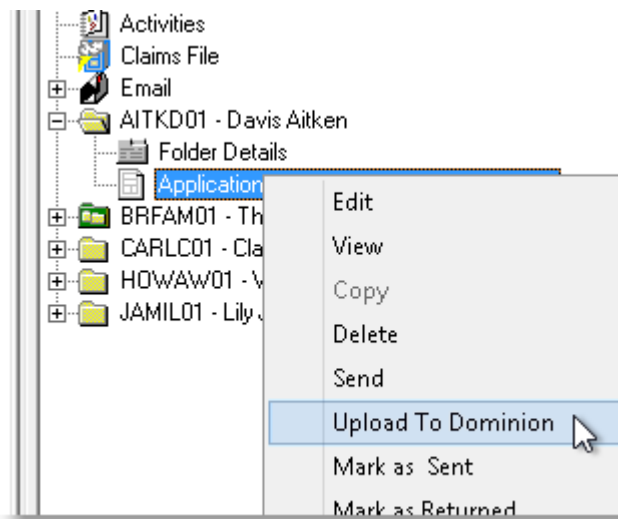
(Figure 2.2)



- 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 personal lines Automobile or Property new business application for Dominion, right-click the application document in the **Desktop Tree** in the TBW window, and select **Upload to Dominion** (see Figure 2.3).

(Figure 2.3)



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

[Return to Contents](#)

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](mailto: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)