



22 October 2013

**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 enhancement to **The Broker's Workstation (TBW)**:


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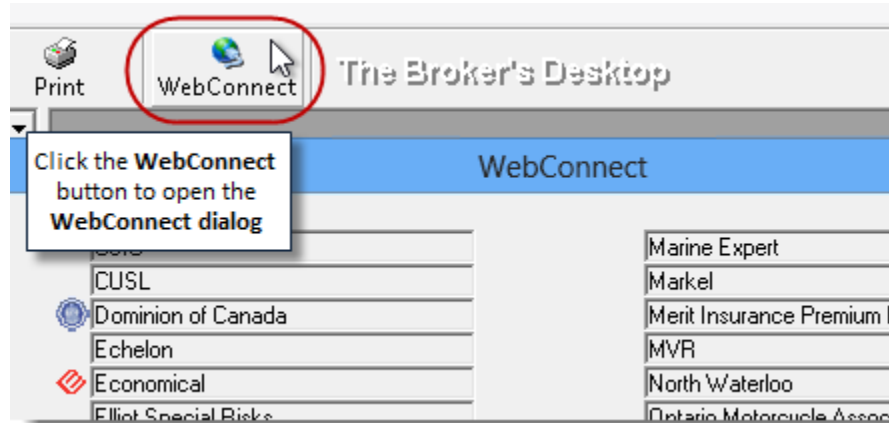
1. [Integration with Hamilton Township Mutual Website](#) – Integration with the Hamilton Township Mutual website is now available through TBW's WebConnect feature.

## **1. Integration with Hamilton Township Mutual Website**

Custom Software Solutions Inc. is pleased to announce that integration with the Hamilton Township Mutual website is now available through TBW's WebConnect feature.

The WebConnect feature allows TBW users 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 open the **WebConnect** dialog and view the list of companies and services available through WebConnect (see Figure 1.1).

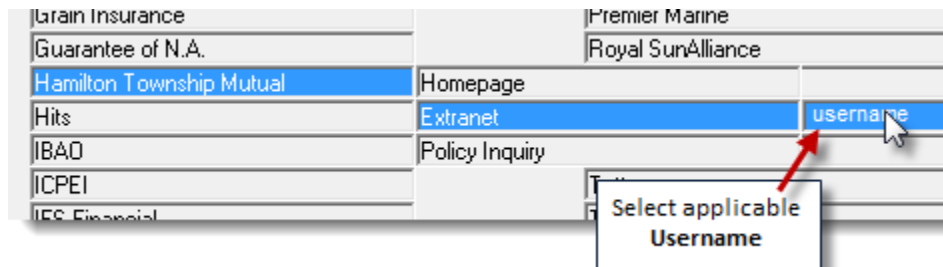
(Figure 1.1)



When accessing Hamilton Township Mutual (HTM) through WebConnect, the following options are available:

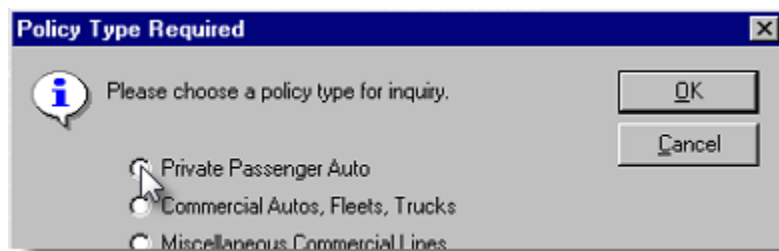
- **Homepage** – Select this option to open the HTM homepage in your web browser.
- **Extranet** – Select Extranet and the applicable **User ID** (see Figure 1.2) to log into and view the HTM Insurance Extranet Dashboard in your web browser.

(Figure 1.2)

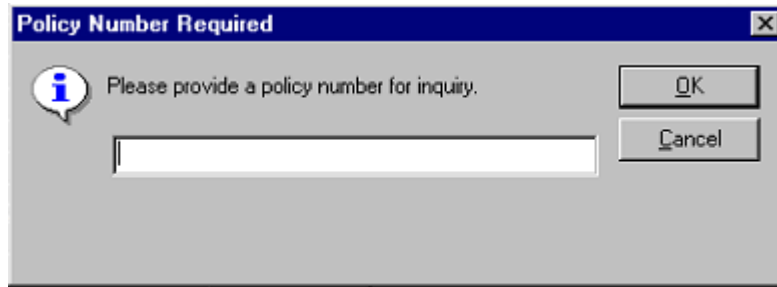



- **Policy Inquiry** – Select Policy Inquiry and the applicable User ID to view details for a specific policy in your web browser.
  - Select the applicable policy type for the inquiry in the **Policy Type Required** dialog (see Figure 1.3), and then enter the target policy number in the **Policy Number Required** dialog (see Figure 1.4).

(Figure 1.3)

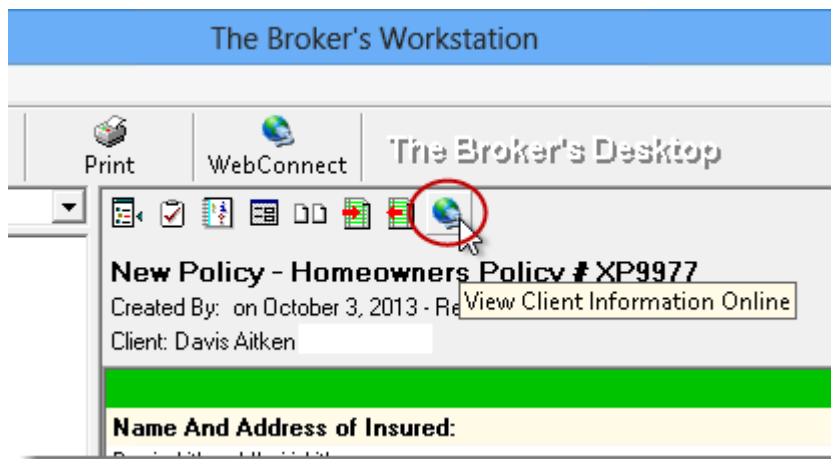


(Figure 1.4)



When viewing a Hamilton Township Mutual policy document, you can also click the **WebConnect**  button on the document toolbar to view details for this policy online (see Figure 1.5).

(Figure 1.5)



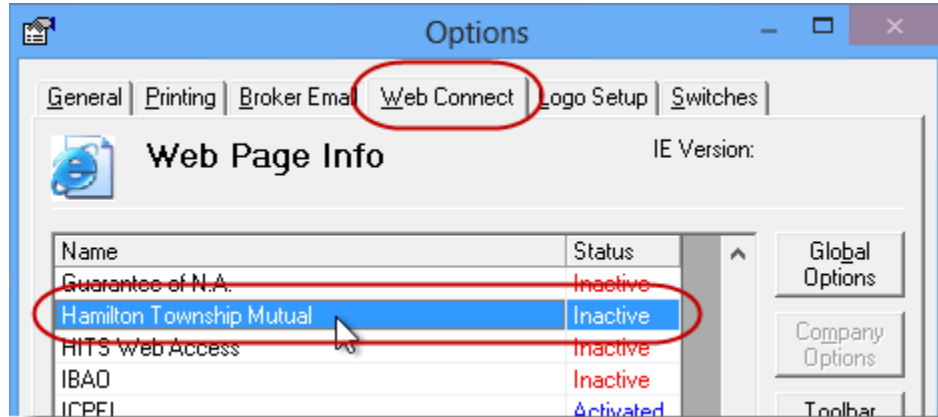
The following one-time setup must be completed before the HTM website can be accessed through TBW's WebConnect feature.

To complete this one-time setup, first ensure you have the required Hamilton Township Mutual **User ID** and **Password**.

- If you require a User ID and Password, please contact your HTM representative for assistance.

In the TBW window, click **Tools, Options**. On the **WebConnect** tab in the **Options** dialog, find and double-click **Hamilton Township Mutual** (see Figure 1.6).

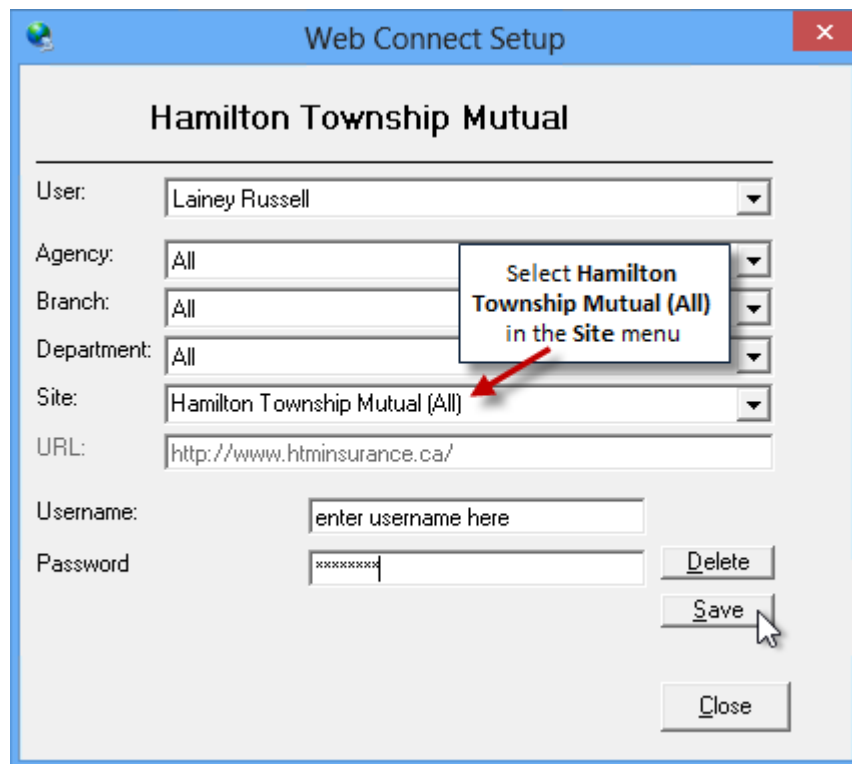
(Figure 1.6)



In the **WebConnect Setup** dialog that displays,

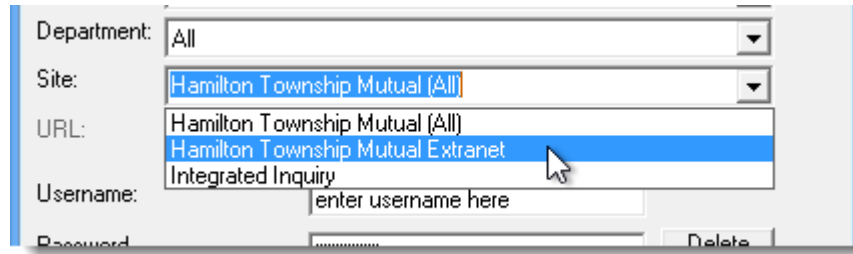
1. Select the applicable **User**.
2. Select **All** or the applicable **Agency/Branch/Department (ABD)**.
3. In the **Site** menu, select **Hamilton Township Mutual (All)**.
4. Enter the appropriate **Username** and **Password**.
5. Click the **Save** button (see Figure 1.7).

(Figure 1.7)



6. Still in the WebConnect Setup dialog, open the **Site** menu again, and select **Hamilton Township Mutual Extranet** (see Figure 1.8). Enter the applicable **Username** and **Password**, and click **Save**.

(Figure 1.8)



7. Open the **Site** menu once again and select **Integrated Inquiry**. Enter the applicable **Username** and **Password**, and click **Save**.

Repeat these steps for additional Users and/or ABDs, as required.

Click **Close** in the **WebConnect Setup** dialog, and then click **OK** in the **Options** dialog.

- *Be sure to update your WebConnect Setup details whenever you reset your Password.*

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

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Please share this information with all 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.



**Microsoft** Partner

Gold Independent Software Vendor (ISV)