



3 February 2015

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)**:

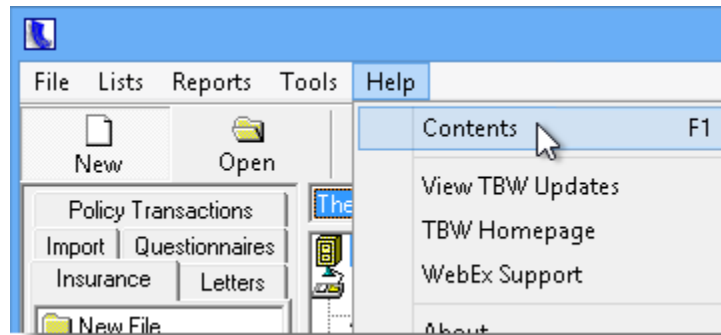
Contents

1. [TBW/TUW Help File Update](#) – The TBW/TUW Help File has been updated with additional topics and information. If you have any Terminal Users in your organization, please follow the provided steps to confirm they have received this recent Help File update.
2. [New Procedure for Missing Documents for CSIO Companies](#) – Rather than contacting Client Services regarding missing documents, TBW users can now save time and improve efficiencies by going directly to the company regarding missing downloads (this does not include Wawanesa I-Biz items).

1. TBW/TUW Help File Update

The TBW/TUW inbuilt Help File has recently been updated with additional topics and information. To access the Help File in the TBW/TUW window, click **Help, Contents** (see Figure 1.1).

(Figure 1.1)

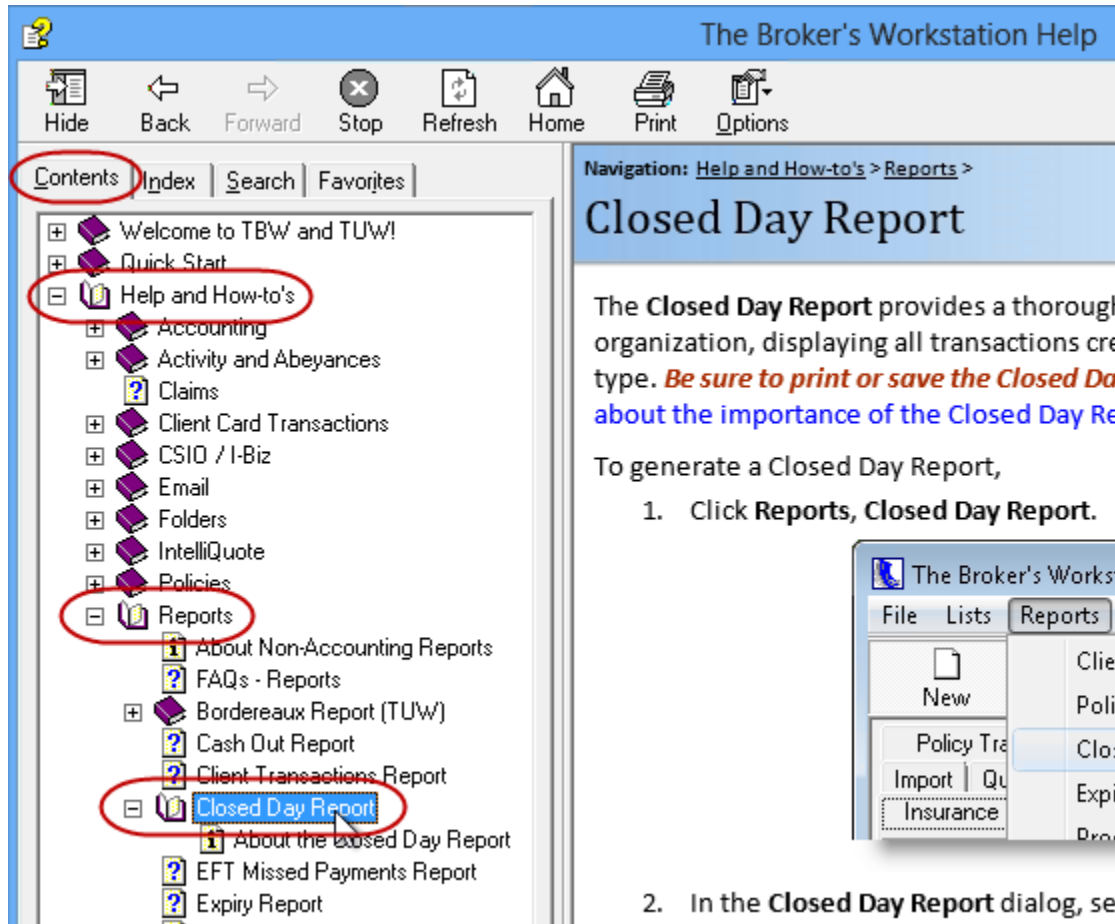


The Help feature will open in its own window, which can be moved, resized, etc., as with any window. Once opened, the Help window can be minimized or moved to the side as necessary while you complete various TBW/TUW or other tasks.

If you have any Terminal Users in your organization, please ensure they have received this recent update to the Help file. To confirm each Terminal User has the current version of the Help File, please follow these steps:

1. On the Terminal User's machine, click **Help, Contents** in the TBW/TUW window to open the Help file.
2. On the **Contents** tab in the Help file, click the **Closed Day Report** item in the **Reports** section under **Help and How-to's** (see Figure 1.2).
 - The Closed Day Report topic is one of the items added to the Help file in the most recent update.

(Figure 1.2)



3. If there is content on the Closed Day Report page (as shown above), the user does have the most recent update for the TBW/TUW Help file. **If, however, no content displays on the Closed Day Report page, please have your IT Department contact Client Services for assistance with updating the information in the user's script file.**

Updating the TBW/TUW Help File is an ongoing project, and not all topics in the Help File have been completed. If you need assistance with a topic not yet found in the Help File, please contact Client Services.

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2. New Procedure for Missing Documents for CSIO Companies

Effective January 1, 2015, TBW users can expedite their receipt of any missing download items from CSIO companies (this does not include Wawanesa I-Biz items) by contacting the applicable company directly to request that the missing EDI documents or eDocs be resent. Rather than contacting Client

Services regarding missing documents, TBW users can now save time and improve efficiencies by going directly to the company regarding missing downloads.

Please refer to the table below for contact information for your CSIO Companies. Please be aware that I-Biz with Wawanesa is not part of this CSIO information, and any requests for missing Wawanesa I-Biz download items must still be forwarded to Client Services.

If the missing documents are still unavailable after three attempts at retrieving your documents from the applicable company, please contact Client Services for assistance. We will confirm that the setup is correct and, if required, we will investigate further to determine whether something else (e.g. missing CSIO setup data) is preventing downloads from being received or processed in TBW.

CSIO Company Contact Information

Company	Contact Email	Contact Name / Phone
Aviva	CAISED1@avivacanada.com	
Chieftain (division of Dominion)	otsserr@travelers.com	
CNS (division of RSA)	national.logistics@rsaroup.ca ; travis.leyenhorst@rsagroup.ca	
Coachman (division of SGI)	broker.interface@sgicanada.ca ; brokerservices@sgicanada.ca	
Commonwell (formerly Farmers Mutual)	ISAppsOps@thecommonwell.ca	
Dominion of Canada (Travelers)	otsserr@travelers.com	
Dufferin Mutual	lwhite@dufferinmutual.com	
Echelon	cdomizio@egi.ca ; servicedesk@egi.ca	
Economical	brokersupport@economical.com	1-844-327-2227
Federation	brokersupport@economical.com	1-844-327-2227
Germania	hkunsenhauser@germaniamutual.com	
Gore Mutual	edi@goremutual.ca	Liz Santos 1-800-265-8600 Ext. 2416
Grenville Mutual	support@grenvillemutual.com	
Guarantee	susan.post@theguarantee.com	
Halwell Mutual	pschmitter@rogers.com	
Hamilton Township Mutual	tcalnan@htminsurace.ca ; dwhite@htminsurace.ca	
Howick Mutual	drowley@howickmutual.com	
Intact (Atlantic Canada)	edi.atlantic@intact.net or EBS Branch	
Intact/Novex/Jevco (ON)	EBS Branch	Help Line 1-855-446-8866

Intact/Novex/Nordic (AB, MB, BC, YK, NT, and NU)	westedi@intact.net	Carrie Will
Jevco (see Intact)		
Kent/Essex	carolh@kemutual.com	
Kings Mutual	ccameron@kingsmutual.ns.ca	
Mennonite Mutual	willemsb@mmfi.com	
North Waterloo	ibs_support@nwfm.com	
Optimum (ON and MB)	mpotter@optimum-insurance.com	Mary Lou Potter 705-476-4814. Ext. 6265
Optimum West (AB and BC)	dgoodhope@optimumwest.bc.ca	Debbie Goodhope 1-800-663-0597 Ext. 5025
Peace Hills	jterry@phgic.com	
Peel Maryborough	hmartin@pmmutual.com	
Peel Mutual	blandman@peelmutual.com ; bbedford@peelmutual.com ; tbradburn@peelmutual.com	
Pembridge / Pafco	edisupport@pembridge.com ; edisupport@pafco.com	
Perth (see Economical)		
Portage	edocs@portagemutual.com	
Pro Mutuel	beniot.boisclair@promutuel.ca	
Red River Mutual	szacharias@redrivermutual.com	
Royal SunAlliance	servicedesk@rsagroup.ca	
Scottish and York (division of Aviva)		
SGI	broker.interface@sgicanada.ca ; brokerservices@sgicanada.ca	
SMI	csio@saskmutual.com	(306)653-4232 Toll Free 1-800-667-3067
South Easthope	jkimpel@seins.on.ca ; images@seins.on.ca	
Trillium Mutual	sgross@trilliummutual.com	
Unica (formerly York Fire)	shelly.bartholomew@unicainsurance.com ; u-connect@unicainsurance.com	
Waterloo (see Economical)		
Western Assurance (division of Royal)	brokerinterface@royalsunalliance.ca ; leila_joshua@royalsunalliance.ca	
Westminster Mutual	jfarquhar@smic.ca	

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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)

To unsubscribe from our email notifications and updates, please contact us at info@cssionline.com or reply to this email.