



28 July 2009

**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 enhancements and newest features to **The Broker's Workstation (TBW)**:

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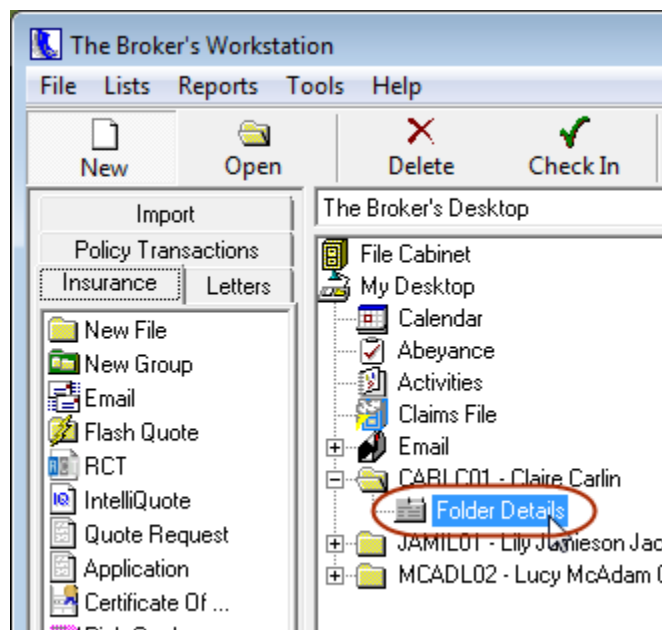
1. [Thumbnail View of Images and PDF Documents in Folder Details](#) – On the Documents tab in Folder Details, images and PDF documents can now be viewed as thumbnails.
2. [Additional Vehicle Details Automatically Entered in Auto IntelliQuote](#) – Additional vehicle details will automatically be filled in when the TBW user creates an Auto IntelliQuote.
3. [Expanded WebConnect Company List](#) – The list of companies and services accessible through the TBW WebConnect feature continues to be expanded with Chieftain Insurance and Dominion's E-CLIPS Portal login.

## 1. Thumbnail View in Folder Details

We are pleased to announce that TBW users can now view images and PDF documents as thumbnails on the Documents tab in Folder Details. Thumbnail images, which are reduced-size versions of original documents, can be used to recognize and assist in organizing images and PDFs in the Folder Details window.

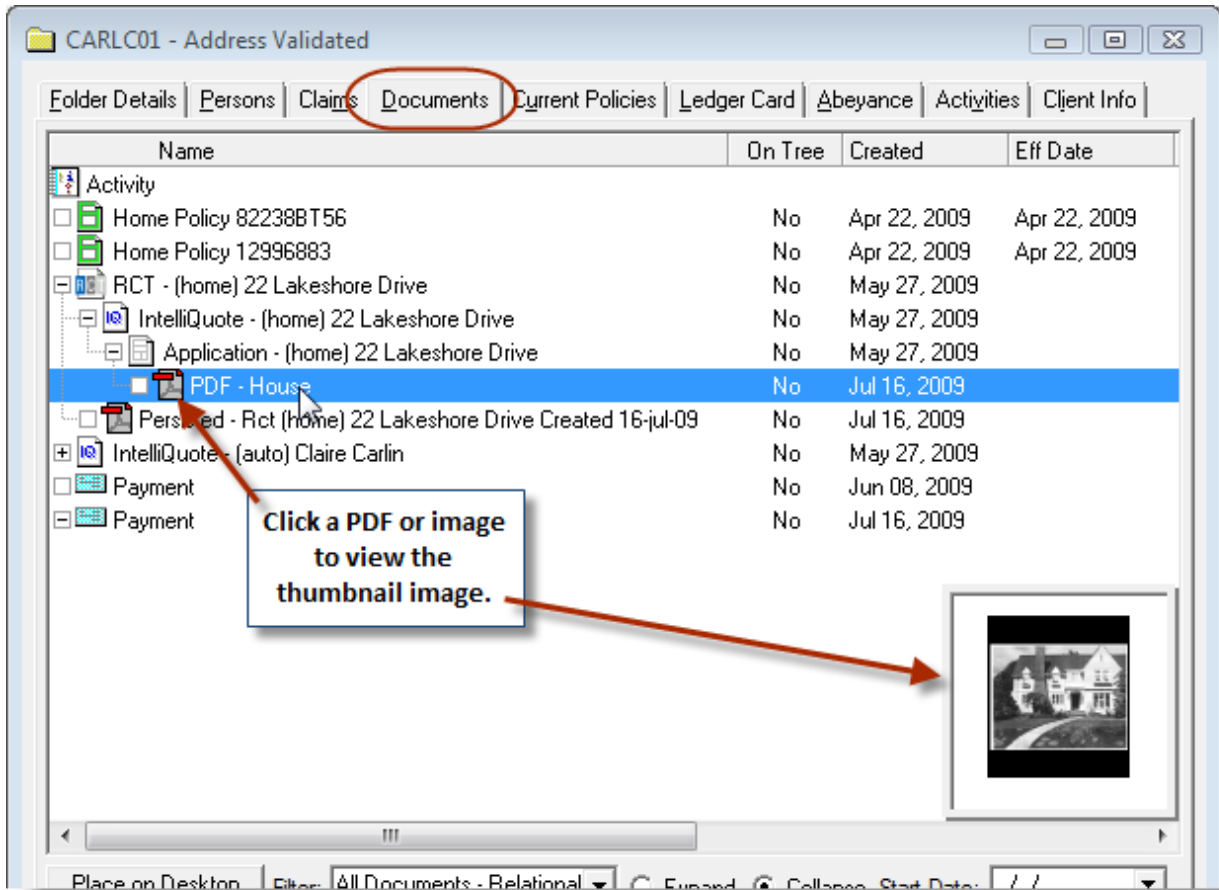
To view a thumbnail of a PDF or persisted document or image in a client folder, double-click **Folder Details** in the **Desktop Tree** (see Figure 1.1).

(Figure 1.1)



Click the **Documents** tab in the **Folder Details** window. Then, simply click the PDF or persisted document or image, and the thumbnail image will appear in the lower right-hand corner of the window (see Figure 1.2). Note that this feature is available whether the image or document is checked out or not.

(Figure 1.2)



To hide the thumbnail view, click the thumbnail itself, or click another, non-PDF or non-image document.

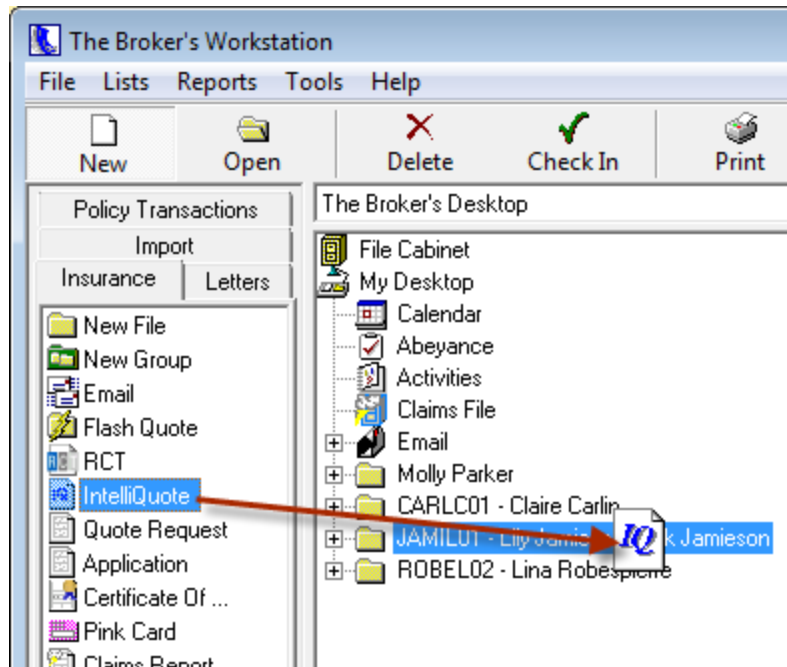
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## 2. Additional Vehicle Details Automatically Entered in Auto IntelliQuote

In response to requests from TBW users, we are pleased to announce that additional vehicle details will be filled in automatically in the Auto IntelliQuote once the user has entered the vehicle make and model.

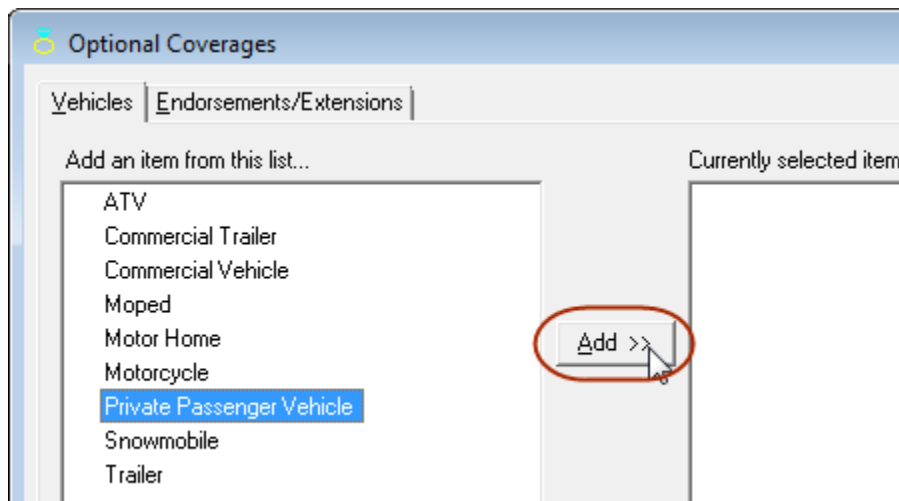
To create an Auto IntelliQuote, drag and drop the **IntelliQuote icon** from the **Insurance Tray** to the client folder in the **Desktop Tree** (see Figure 2.1).

(Figure 2.1)



Enter requested details in the IntelliQuote window, provide a document name, and select Insurance Companies. In the **Optional Coverages window**, select the item to be added, and then click the **Add** button (see Figure 2.2).

(Figure 2.2)



The Coverage Item Wizard will open. While working through the Wizard, be sure to include the **Year**, **Manufacturer**, and **Model** of the vehicle in Step 2. In Step 3 of the Wizard, note that certain information has been automatically pre-populated, including the **Gross Vehicle Weight (kg)**, **Fuel**, and **Number of Cylinders** (for a Private Passenger Vehicle) (see Figure 2.3).

(Figure 2.3)

Coverage Item Wizard - Step 3 of 11 - 2007 JEEP COMMANDER SPORT 4DR 4W

**General Details**  
 Enter the General Details for this coverage item.

Business Km Per Year	<input type="text"/>	<input type="checkbox"/>
Gross Vehicle Weight (kg)	2230	<input type="checkbox"/>
Fuel	Gas	<input type="checkbox"/>
Mortgage Free Home Ownership	No	<input type="checkbox"/>
License Plate Number	<input type="text"/>	<input type="checkbox"/>
Number of Cylinders	6	<input type="checkbox"/>
Odometer (km)	<input type="text"/>	<input type="checkbox"/>
Modified/Customized	<input type="text"/>	<input type="checkbox"/>

Additional details that will be entered automatically for other types of vehicles include the following:

- The **CCs** for an **ATV**
- The **CCs** for a **Motorcycle**
- The **Type of Motor** (Ontario only) and **CCs** for a **Snowmobile**

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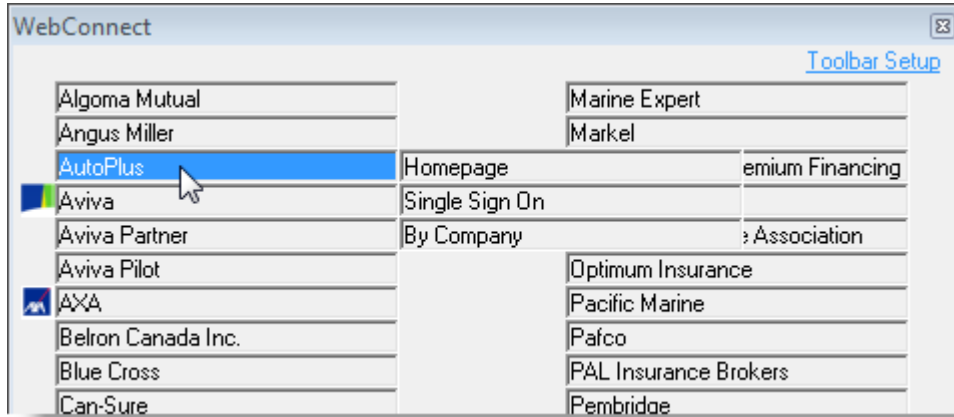
### 3. Expanded WebConnect Company List

We are pleased to announce that the list of companies and services available through TBW's WebConnect tool has been further expanded, in response to requests by TBW clients.

The WebConnect feature allows the TBW user to access specific insurance company and service bureau websites quickly and easily directly from the TBW interface. When the TBW user clicks the

**WebConnect button** on the TBW toolbar, the list of companies and services available through WebConnect opens in the **WebConnect window** (see Figure 3.1).

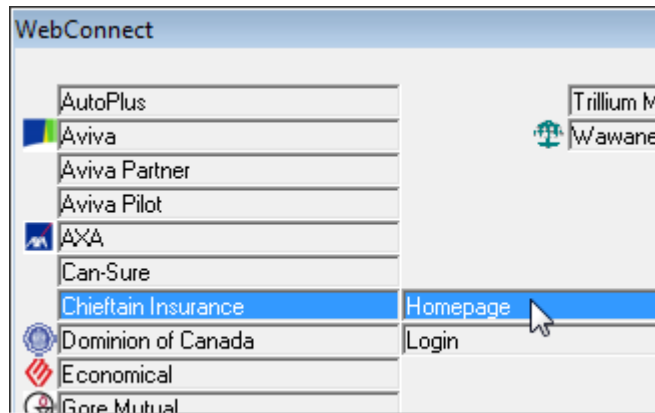
(Figure 3.1)



This list has been expanded to include the following companies and services:

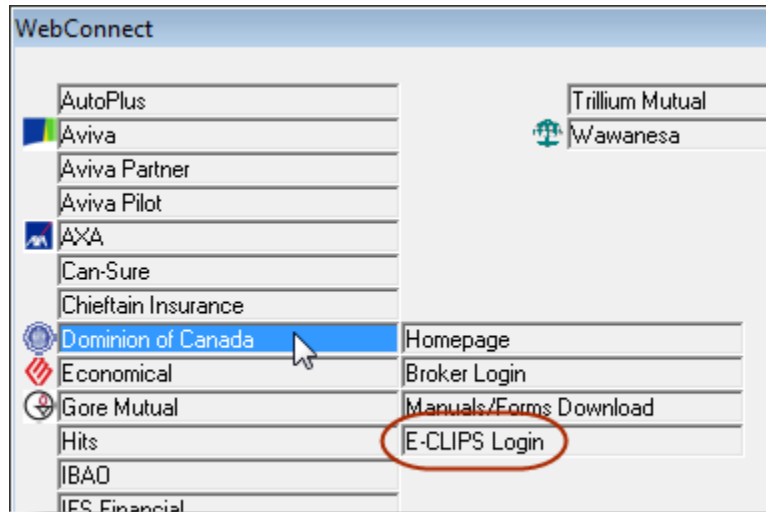
- **Chieftain Insurance:** The Chieftain Insurance link provides the TBW user with convenient access to the company Homepage and Broker Login page for this Ontario-based insurance company (see Figure 3.2).

(Figure 3.2)



- **Dominion E-CLIPS Portal:** The Dominion of Canada WebConnect menu has been expanded to provide the TBW user with a link to the Dominion E-CLIPS Portal login page (see Figure 3.3).

(Figure 3.3)



Please note that access to TBW's WebConnect feature is controlled by User Rights (**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 these enhancements 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**.

Yours sincerely,

Custom Software Solutions Inc.

