



26 June 2012

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)**:

Contents

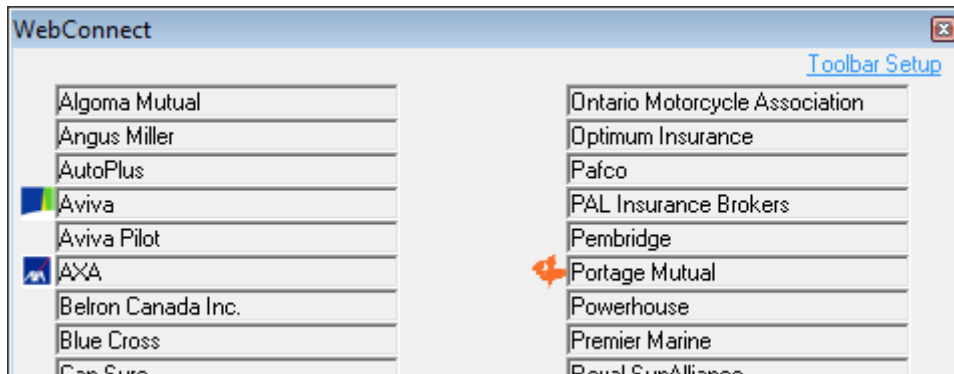
1. [Perform SGI BVS Calculation and Attach PDF Report to Client Folder \(Commercial\)](#) –
Integration services to the SGI Canada website through use of TBW's WebConnect tool have been expanded. Now, after performing a BVS calculation for commercial property with WebConnect, the user can attach the resulting PDF report to the corresponding Client folder in TBW.

1. Perform SGI BVS Calculation and Attach PDF Report to Client Folder (Commercial)

Custom Software Solutions Inc. is pleased to announce that integration services to the SGI Canada website through use of TBW's WebConnect tool have been expanded. Now, after performing a BVS calculation for commercial property with WebConnect, the TBW user can create a PDF report of the calculation and attach that file to the corresponding Client folder.

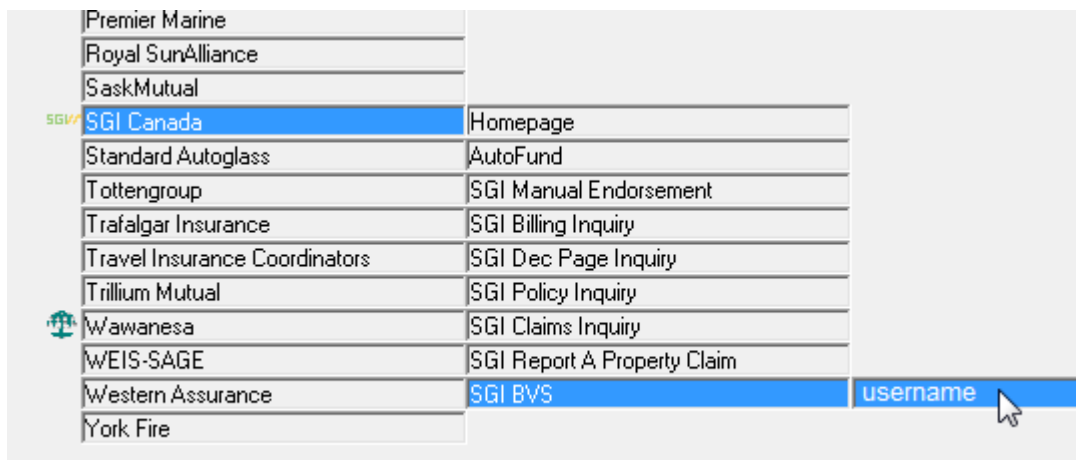
The WebConnect feature allows TBW users to access various insurance company and service bureau websites quickly and easily directly from the TBW interface. When the TBW user clicks the **WebConnect** button on the TBW toolbar, the list of companies and services available through WebConnect displays in the **WebConnect** dialog (see Figure 1.1).

(Figure 1.1)



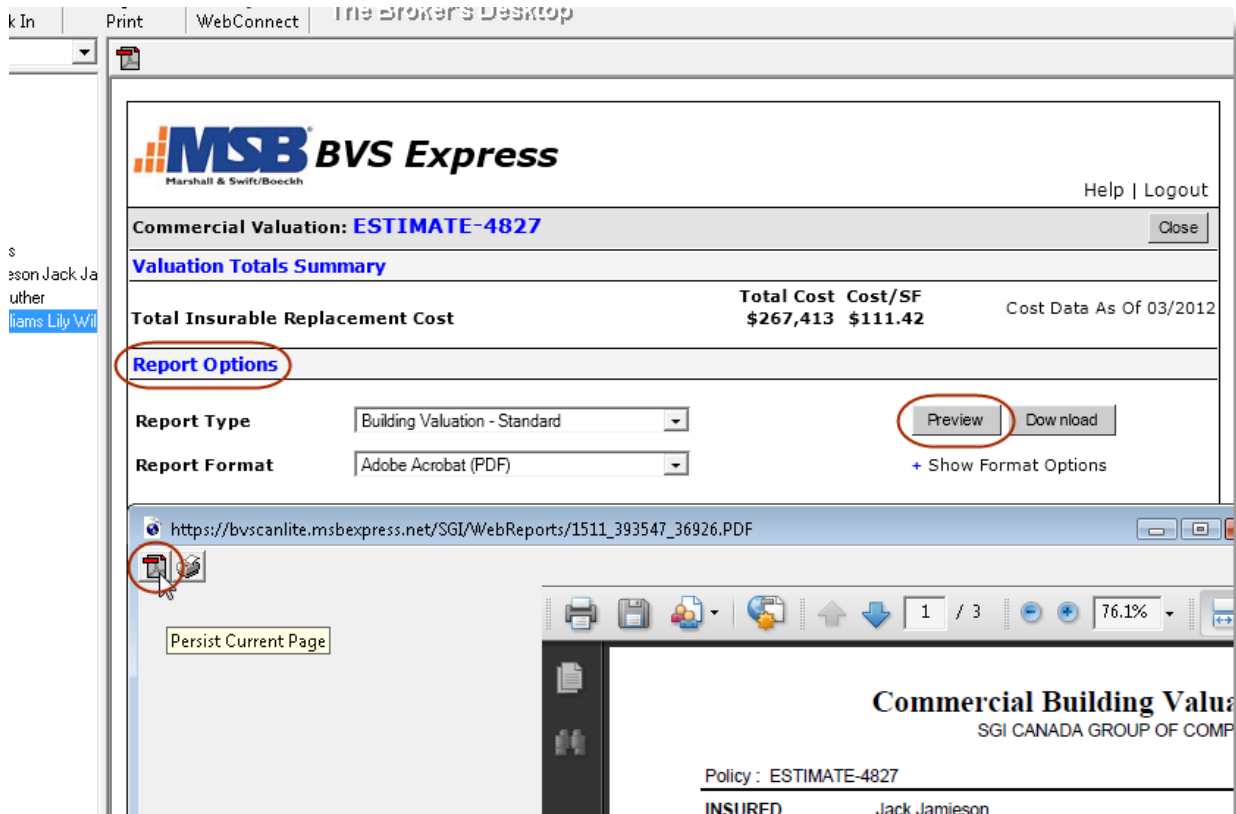
The **SGI BVS** feature can be accessed through WebConnect. Select the applicable **User ID** (see Figure 1.2) to open **MSB BVS Express** in the TBW window and create a new commercial valuation or view or modify a valuation in progress.

(Figure 1.2)



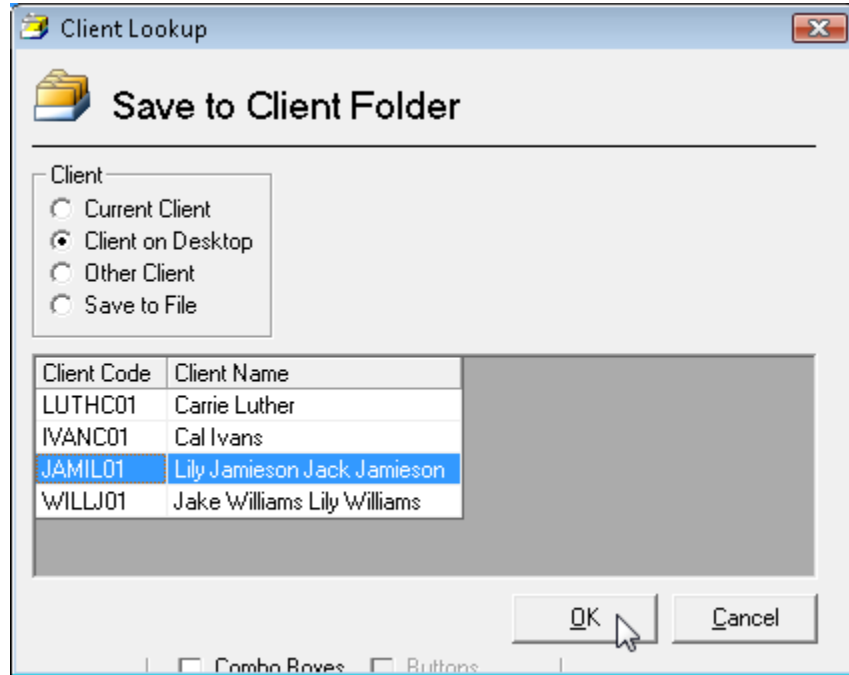
Once a valuation has been created, the PDF report of the valuation can be saved to the corresponding Client folder in TBW. In the **Report Options** section, choose the **Report Type**, and select **Adobe Acrobat (PDF)** in the **Report Format** menu. Click the **Preview** button and, in the preview window, click the **PDF** button (see Figure 1.3).


(Figure 1.3)



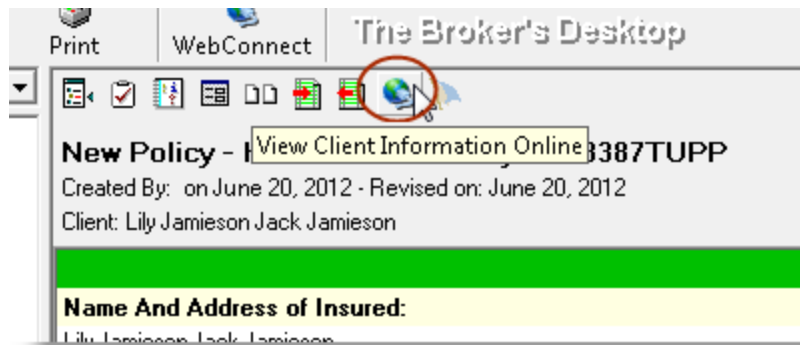
In the **Save to Client Folder** dialog, locate and select the applicable Client folder, and then click **OK** (see Figure 1.4). Enter a descriptive name for the PDF file in the **Get Doc Name** dialog, and click **OK**. The PDF file will display in the Client folder in the Desktop Tree.

(Figure 1.4)



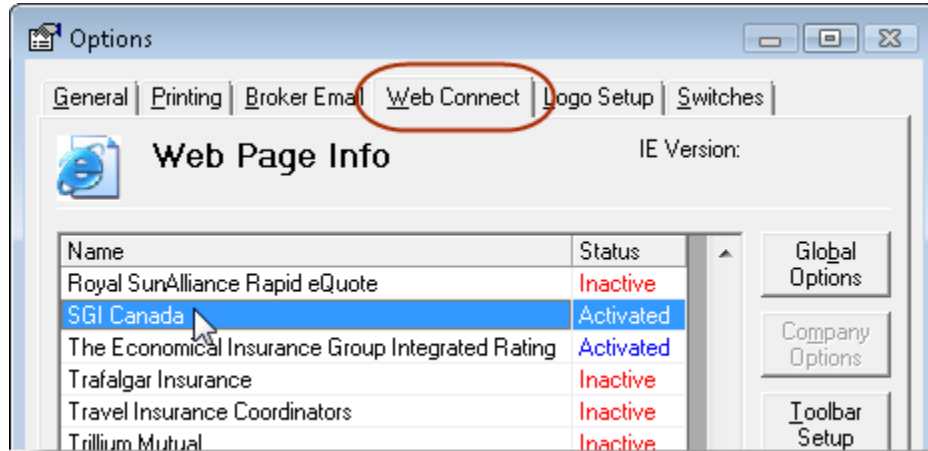
The SGI BVS feature can also be accessed through the **WebConnect**  button on the document toolbar (see Figure 1.5).

(Figure 1.5)



If SGI WebConnect is already set up in your system, please confirm that SGI BVS is available as follows. In the TBW window, click **Tools, Options**. On the **WebConnect** tab in the **Options** dialog, find and double-click **SGI Canada** (see Figure 1.6).

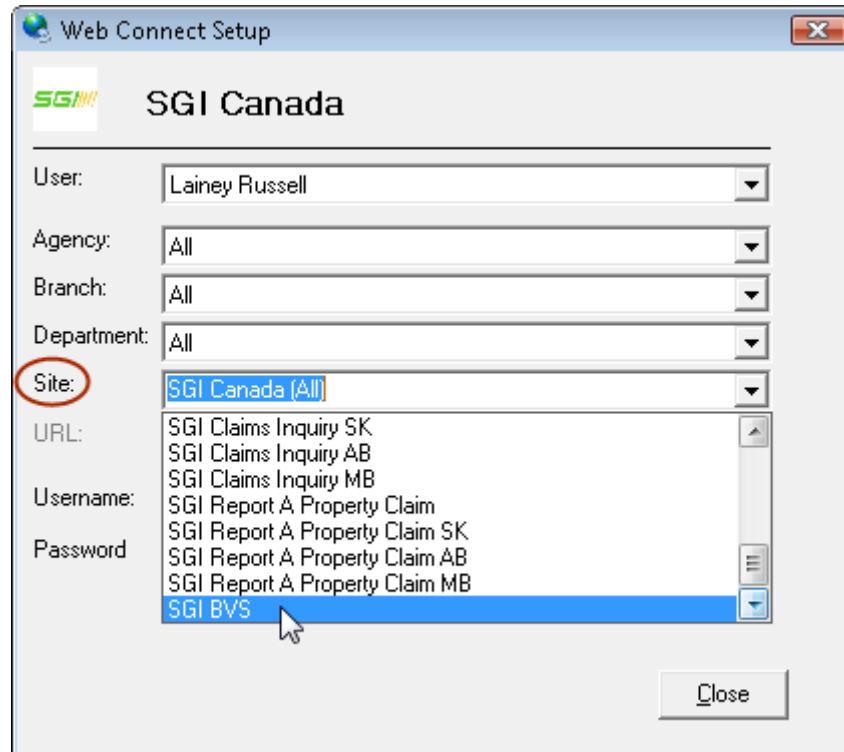
(Figure 1.6)



In the **WebConnect Setup** dialog, select the applicable **User** and **Agency/Branch/Department**, and then open the **Site** drop-down menu to ensure that **SGI BVS** is available (see Figure 1.7). Next, to populate the existing password to the new site, select **SGI Canada (All)** in the **Site** menu, and click the **Save** button. Click **Close**, and click **OK** in the **Options** dialog. Proceed to use the SGI BVS feature as required.

- If SGI BVS is *not* available in the Site menu, please contact Client Services for assistance.

(Figure 1.7)



If SGI WebConnect is not yet set up in your system, you must complete a one-time setup in TBW before SGI BVS can be accessed through the WebConnect feature.

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

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

Then, in the TBW window, click **Tools, Options**. On the **WebConnect** tab in the **Options** dialog, find and double-click **SGI Canada** (see Figure 1.6).

In the **WebConnect Setup** dialog, select the applicable **User** and **Agency/Branch/Department**. Select **SGI Canada (All)** from the **Site** menu. Enter the **Username** and **Password**, and click **Save** (see Figure 1.8). Repeat as required for additional Users.

(Figure 1.8)

The screenshot shows a window titled "Web Connect Setup" with the SGI Canada logo and name. It contains several dropdown menus and text input fields. The "User" dropdown is set to "Lainey Russell". The "Agency", "Branch", and "Department" dropdowns are all set to "All". The "Site" dropdown is set to "SGI Canada (All)". The "URL" field contains "http://www.sgiCanada.ca/". Below these are fields for "Username" (containing "username") and "Password" (masked with asterisks). To the right of the password field are three buttons: "Delete", "Save", and "Close". A mouse cursor is pointing at the "Save" button.

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**).

Please contact Client Services at 1-888-291-3588 (toll-free telephone) for assistance in setting up this feature.

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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 (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)