

22 February 2019

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 new features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

Contents

1. [Send Pink Cards using My Proof of Insurance eDelivery](#) – TBW users can now send Pink Cards to clients using CSIO My Proof of Insurance eDelivery, allowing the client to save the Pink Card to a computer or mobile device, ready to access at any time.

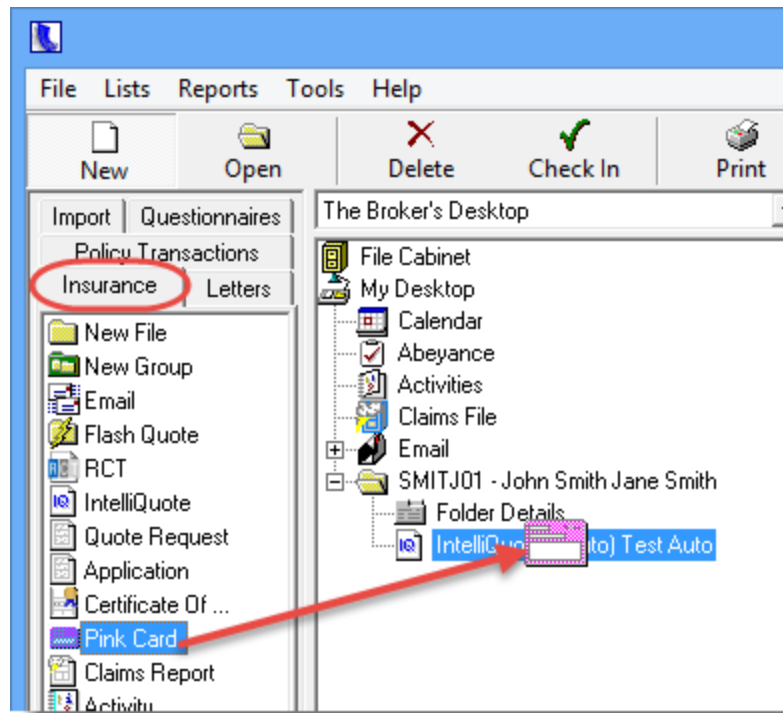
1. Send Pink Cards using My Proof of Insurance eDelivery

Please note: This new feature is currently available via a switch for any TBW user in a private auto province wishing to be a beta tester for this functionality. Please contact Client Services if you are interested in being a beta tester for this feature.

TBW users can now send Pink Cards to clients using CSIO My Proof of Insurance eDelivery. When this option is selected, the CSIO service will send an email to the customer with a PDF Pink Card attached, as well as a link to download the Pink Card to a smartphone's digital wallet.

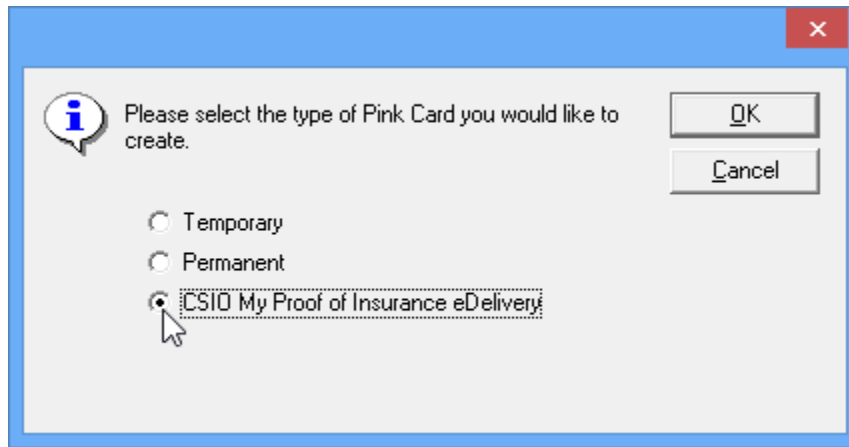
Once the simple, [one-time setup](#) has been completed for this feature, first ensure the Client folder has a valid email address for the client. Then, drag and drop the **Pink Card** icon from the Insurance Tray onto the IQ, application, or policy document in the Desktop Tree (see Figure 1.1).

(Figure 1.1)



Select **CSIO My Proof of Insurance eDelivery** in the pop-up window, and click OK (see Figure 1.2).

(Figure 1.2)



In the Pink Card form, select the **Insurance Company** (if applicable), ensure the applicable **Binder/Policy Number** has been entered, and click OK (see Figure 1.3).

- In this form, note that the Insurance Company address is read-only and cannot be modified, the vehicle(s) cannot be deselected, and the Other Vehicle button is not accessible.

(Figure 1.3)

The screenshot shows a software window titled "Pink Cards" with a blue title bar. The window contains several sections:

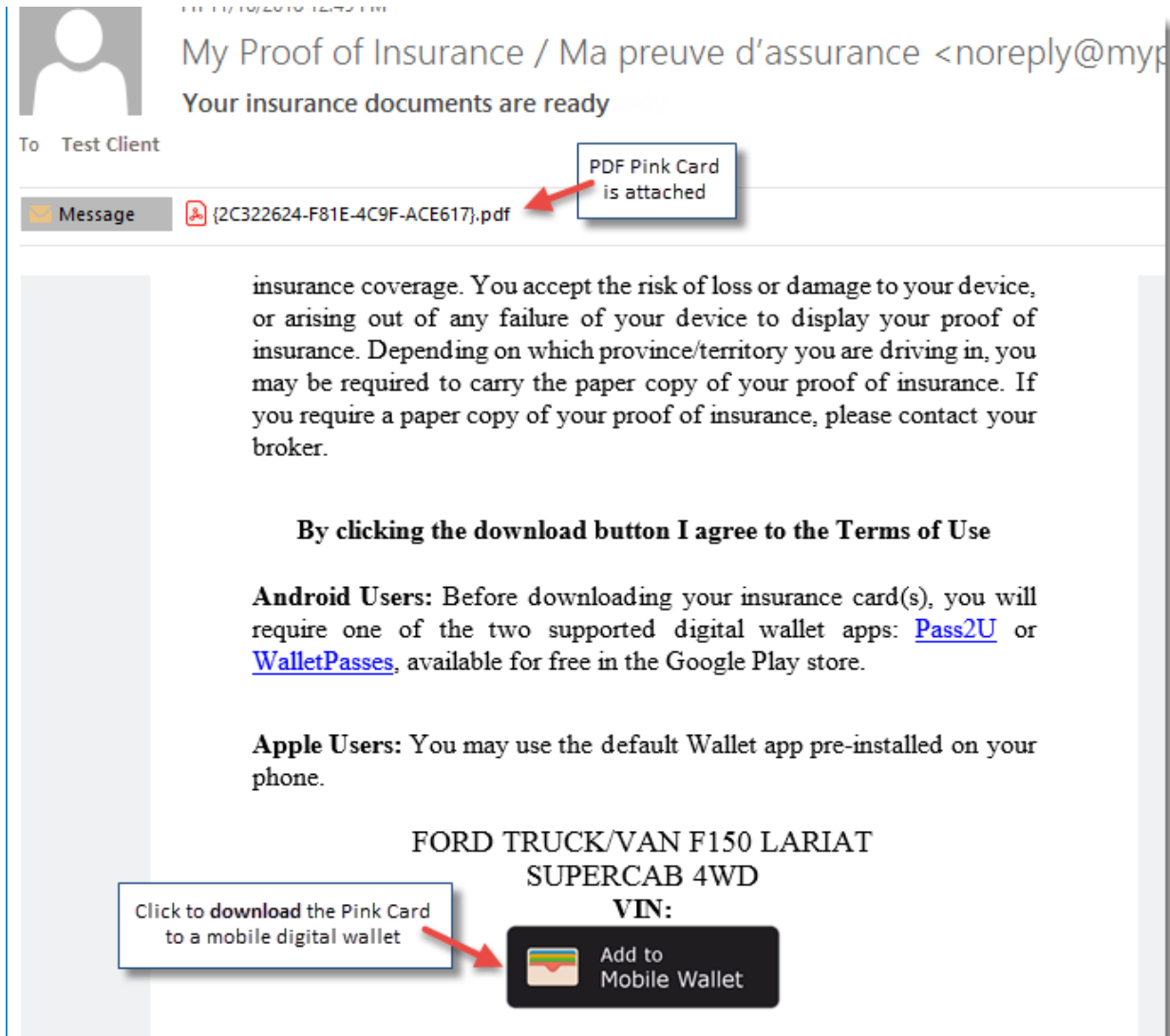
- Details:**
 - Company Name: Dominion
 - Company Address: 1234 Any St Anytown AB T8V 3X8
 - Binder: TestAuto12
 - Effective Date: 01/30/2019 (format MM/DD/YYYY)
 - Expiry Date: 03/01/2019
- Insured - Leave name blank to use actual owner name on each vehicle**
 - Name: (empty field)
 - Address: 123 Any St
 - City: Anytown, Prov: AB
 - Postal Code: T8V 3X8, Country: Canada
- A button labeled "Other Vehicle..."
- A table with the following content:


Coverage Item	Description
<input checked="" type="checkbox"/> Private Passenger Vehicle	2018 CHEVROLET TRUCK/VAN COLORADO LT CREW CA...
- Buttons at the bottom: "Select All", "Deselect All", "OK", and "Cancel".

A pop-up window will display to inform you when the document has been sent, and the new Pink Card will be available in PDF format in the Client folder in the Desktop Tree.

The client will receive an email with a PDF Pink Card attached, ready to save to a computer or tablet for future access. The email will also provide a link to download the Pink Card to a mobile digital wallet (e.g. Apple Wallet for iPhone; Pass2U or WalletPasses for Android) (see Figure 1.4).

(Figure 1.4)



Once the Pink Card has been downloaded to a mobile wallet, the customer can simply open the digital wallet and select the Pink Card to view (see Figure 1.5). Click the  button in the lower right corner to view additional details for the Pink Card.

(Figure 1.5)



Setup for CSIO My Proof of Insurance eDelivery

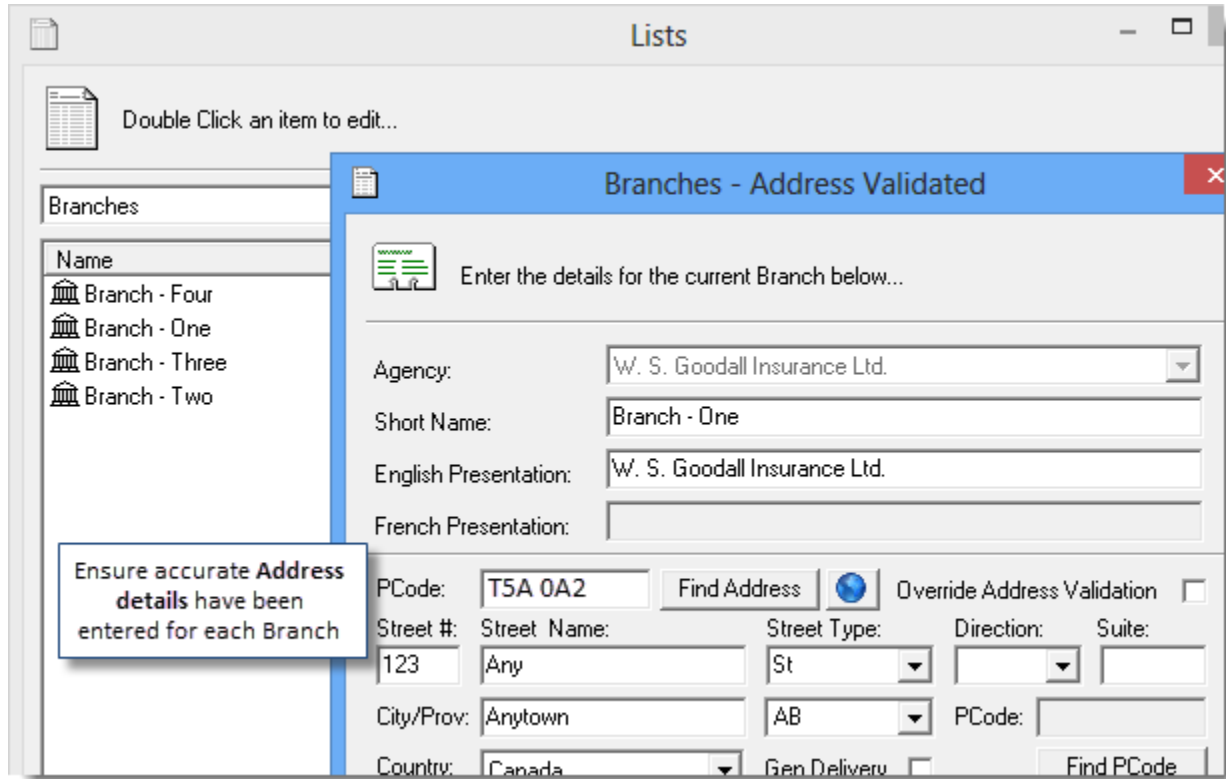
The following one-time setup for this feature must be completed in TBW before the functionality can be used.

To set up this feature,

1. Ensure you have the required My Proof of Insurance User ID and Password.
 - This User ID and Password are required for WebConnect setup for “My Proof of Insurance eDelivery” in step 4c below.
 - If you require a User ID and Password, please contact your My Proof of Insurance representative for assistance.
2. Ensure address details have been entered for each Branch in your organization (this address information will display on the eDelivery slip).
 - a. In the TBW window, click **Lists, Branch Codes**.

- b. In the **Branches – Lists** window, double-click a branch, confirm accurate address details have been entered in the Branches window (see Figure 1.6), and click OK.

(Figure 1.6)



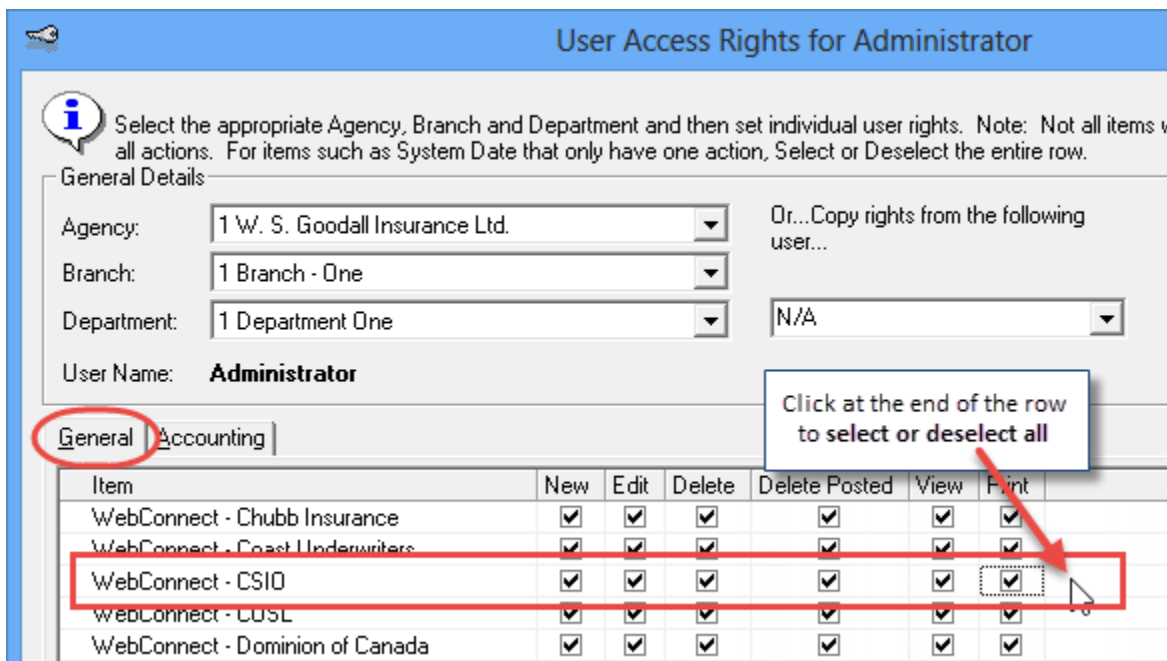
- c. Repeat as required to confirm address details for each additional branch in your organization.
 - d. Click **OK** in the Lists window.
3. Set appropriate **User Rights** for this feature for applicable TBW users as follows:
 - a. Click **Tools, Administrative, User Manager**.
 - b. In the **User Level Access Rights** dialog, select the **User Name** and then click the **Rights** button (see Figure 1.7).

(Figure 1.7)



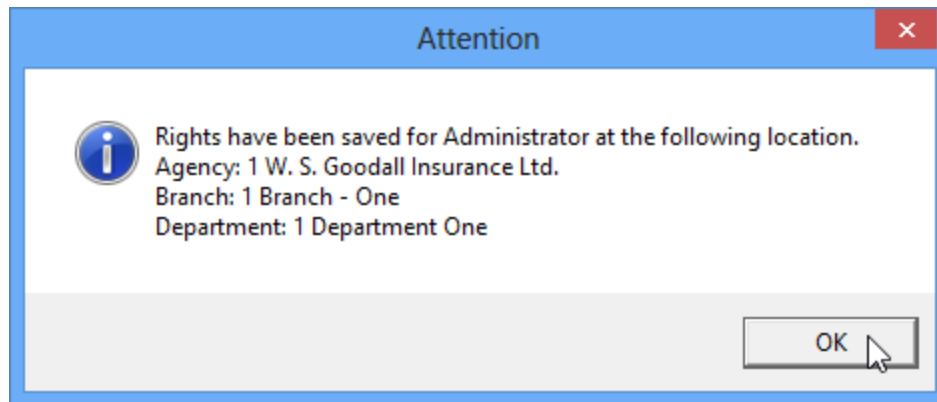
- c. On the **General** tab in the User Access Rights window, select the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – CSIO** (see Figure 1.8).

(Figure 1.8)



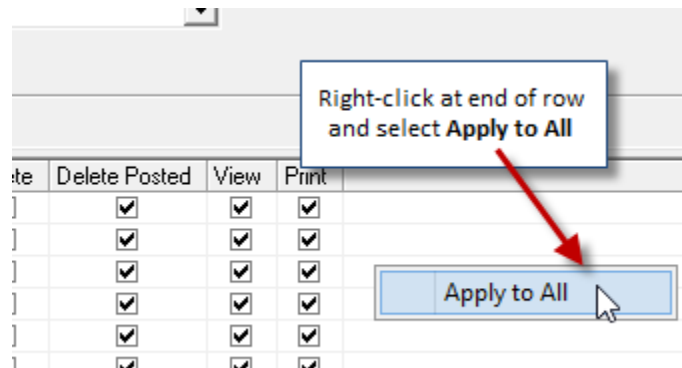
- d. Click **OK** in the **User Access Rights** window to save these rights for this user for this ABD, and then click **OK** in the **Attention** window (see Figure 1.9).

(Figure 1.9)



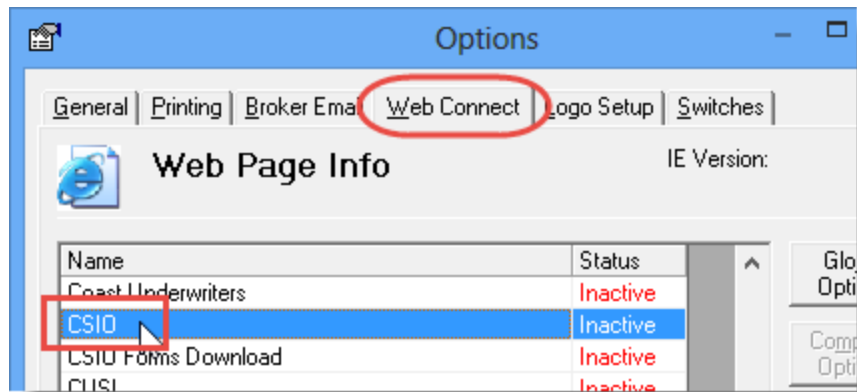
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – CSIO* to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.10).

(Figure 1.10)



- f. Click **Close** in the **User Access Rights** window.
 - g. Repeat these steps for each additional TBW user requiring these rights.
 - h. Click **OK** in the **User Level Access Rights** window.
4. Next, to set up applicable users for CSIO/My Proof of Insurance eDelivery in WebConnect, follow these steps:
 - a. Click **Tools, Options** in the TBW window.
 - b. On the **WebConnect** tab in the Options window, find and double-click **CSIO** (see Figure 1.11).

(Figure 1.11)



- c. In the **WebConnect Setup** window,
 - i. Select the applicable **User**.
 - ii. Select **All** or the applicable **ABD** (Agency/Branch/Department).
 - iii. In the Site menu, ensure **My Proof of Insurance eDelivery** is selected.
 - iv. Enter the appropriate **Username** and **Password**.
 - v. Click **Save** (see Figure 1.12).

(Figure 1.12)



- vi. Click **OK** in the **Save Username/Password** box.
 - vii. Repeat these steps as necessary for additional ABDs and/or users.
 - viii. Click **Close** in the WebConnect Setup dialog.
 - o *Be sure to update WebConnect Setup details whenever you reset your password.*
 - d. Click **OK** in the Options dialog.
5. Close TBW and then reopen the program.

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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)

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