

7 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

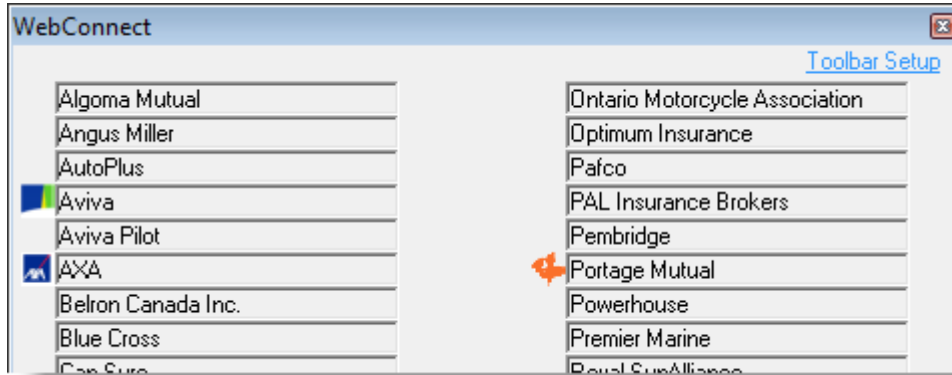
1. [Expanded Integration Services to Merit Insurance Premium Financing Website](#) – Integration services to the Merit Insurance Premium Financing website through use of TBW's WebConnect tool have been expanded.

1. Expanded Integration Services to Merit Insurance Premium Financing Website

Custom Software Solutions Inc. (CSSI) is pleased to announce the completion and release of the integration project with Merit Insurance Premium Financing. The connectivity integrates CSSI's The Broker's Workstation (TBW) and stand alone rating and underwriting system, IntelliQuote (IQ), with Merit's online Broker financing system. The project connects TBW and IQ seamlessly and securely with Merit's online Broker system for finance quoting for all lines of business, contract generation, and account information lookup.

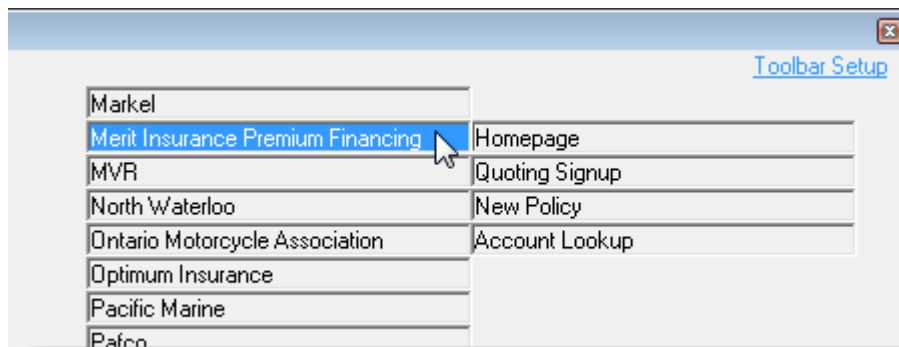
The WebConnect feature allows TBW users to access various insurance company and service bureau websites quickly and easily directly from the TBW interface. When the TBW user clicks the **WebConnect**  **button** on the TBW toolbar, the list of companies and services available through WebConnect displays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

(Figure 1.1)



Previously, the Merit Insurance Premium Financing website homepage could be accessed through the WebConnect toolbar. Now, additional options are available, as well, including **Quoting Signup**, **New Policy**, and **Account Lookup** (see Figure 1.2).

(Figure 1.2)



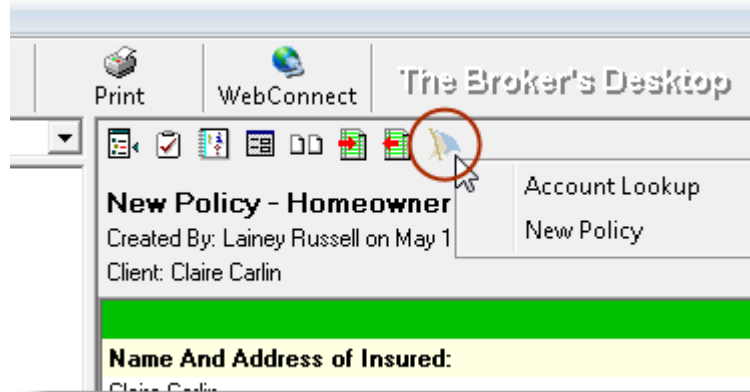
- Select **Homepage** to open a browser window displaying the Merit website homepage.
- Select **Quoting Signup** to access the Merit Finance Quoting System login page and request an account directly from Merit.
 - You will be provided with the option to enter WebConnect account settings. Click **Yes** to go first to the WebConnect tab in the Options dialog, or click **No** to proceed without entering account details.
- Select **New Policy** and the applicable **User Name** to access the Merit Finance Calculator page.
 - Click the **Contract** button to add additional policy-related details (see Figure 1.3).
- Select **Account Lookup** and the applicable **User Name** to access the Merit Account Lookup page and perform a Name/Contract Search.

(Figure 1.3)

Once the Merit WebConnect account has been set up, the **Merit WebConnect** button will also be available on the toolbar in IntelliQuote, Application, and Policy documents. Click the button and select either **Account Lookup** or **New Policy** (see Figure 1.4).

- Select **Account Lookup** to query the current document's Insureds Name.
- Select **New Policy** to access the Merit Finance Calculator page, which will be prepopulated with policy-related details for the current document.
 - Click the **Contract** button to view additional policy-related details (see Figure 1.3).

(Figure 1.4)



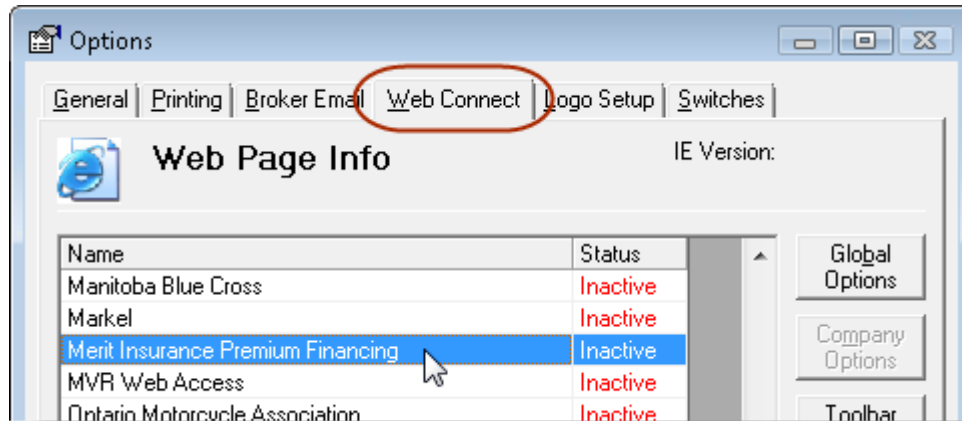
Before these options can be accessed through the WebConnect feature, you must complete a one-time setup in TBW as follows. First, ensure you have the required **Merit User ID** and **Password**.

- If you require a User ID and Password, please contact your Merit Insurance Premium Financing representative for assistance.

Then, in the TBW window, click **Tools, Options**. In the **Options** dialog on the **WebConnect** tab, find and double-click **Merit Insurance Premium Financing** (see Figure 1.5).

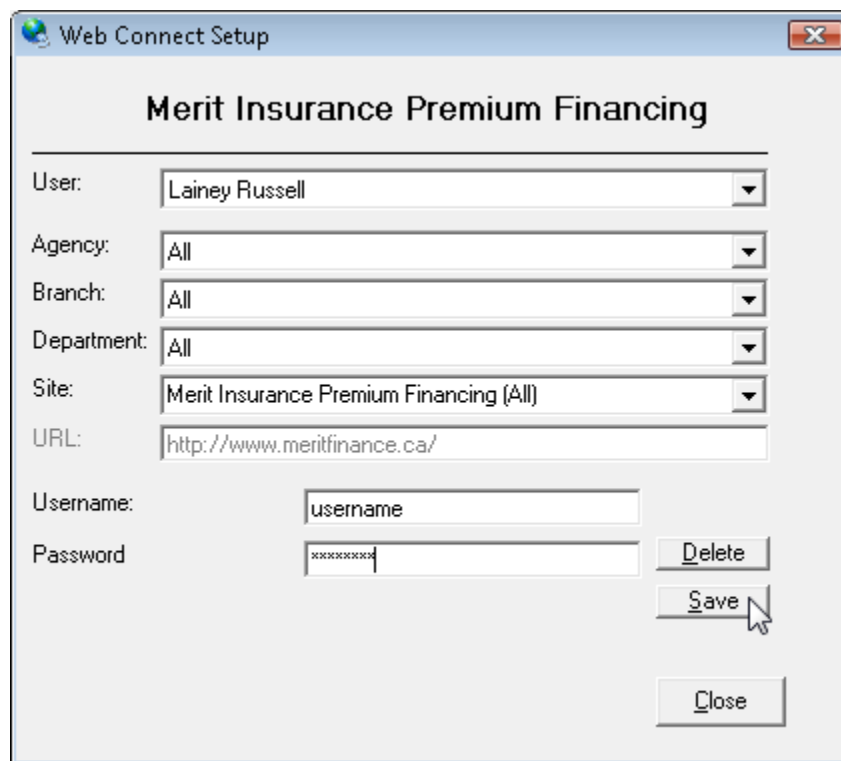
- If Merit cannot be selected, the Administrator must enable this option in his/her account by clicking the **Toolbar Setup** button on the WebConnect tab, and clicking to select Merit Insurance Premium Financing in the corresponding **Show on Toolbar** checkbox.

(Figure 1.5)



In the **WebConnect Setup** dialog, select the applicable **User** and **Agency/Branch/Department**. Enter the **Username** and **Password**, and click **Save** (see Figure 1.6). Repeat as required for additional Users.

(Figure 1.6)



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)