27 July 2020

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.   Policy Inquiry for Trillium Mutual using WebConnect

In TBW WebConnect, services for Trillium Mutual now include the ability to perform a policy inquiry and attach the policy in HTML format to the applicable Client folder.
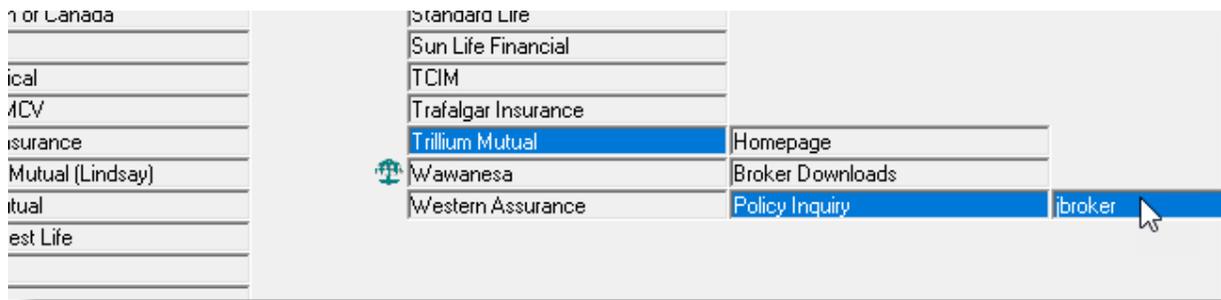
The WebConnect feature allows TBW users to access various insurance company and service bureau websites quickly and easily directly from the TBW interface. When you click the **WebConnect** button on the TBW toolbar, the list of companies and services available through WebConnect displays in the WebConnect window (see Figure 1.1).

Custom Software SOLUTIONS INC.

297 Nelson St. W. P.O. Box 639, Virden, MB R0M 2C0   •   **cssionline.com**
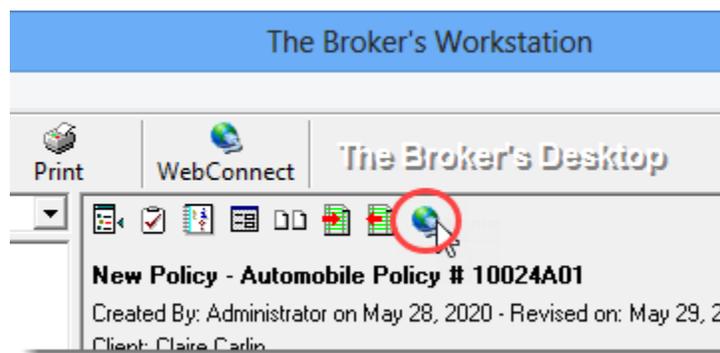Tel: 204-748-4800   •   Toll-free: 1-888-291-3588   •   Fax: 204-748-4806

(Figure 1.1)

To perform a policy inquiry for Trillium Mutual, select **Trillium Mutual**, **Policy Inquiry**, and the applicable **Username** in the WebConnect window (see Figure 1.2).
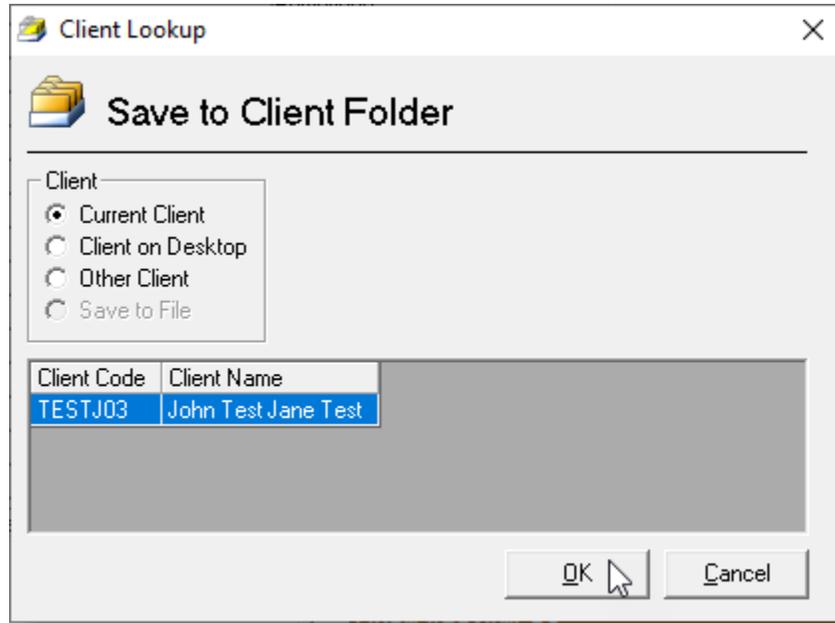
(Figure 1.2)

- Note that you can also initiate a policy inquiry from a Trillium policy document. When you are viewing a Trillium policy document in the TBW window, click the **WebConnect** 🌐 button on the document toolbar (see Figure 1.3). Applicable inquiry details (e.g. policy number and insured's name) will be populated automatically.

(Figure 1.3)

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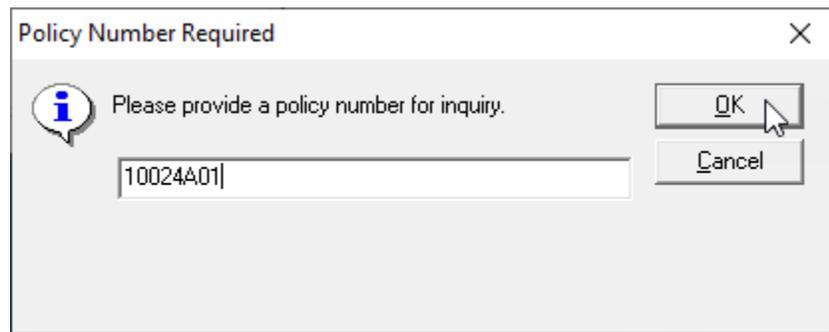Tel: 204-748-4800   •   Toll-free: 1-888-291-3588   •   Fax: 204-748-4806

In the **Client Lookup** window, find and select the Client folder where the policy will be saved, and then click OK (see Figure 1.4).
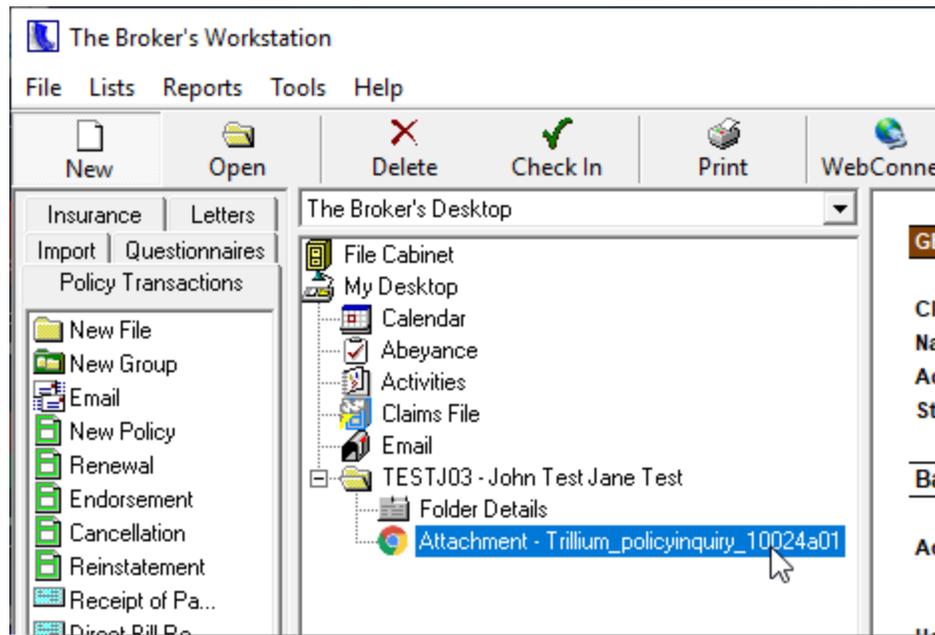
(Figure 1.4)

In the **Policy Number Required** pop-up, specify the policy number and click OK (see Figure 1.5).

(Figure 1.5)

Once generated, the policy (in HTML format) will be attached to the applicable Client folder (see Figure 1.6). Double-click the file to open it in a separate web browser window and view policy details.

(Figure 1.6)

Please note, a one-time setup must be completed in TBW before the WebConnect feature can be used for Trillium Mutual. Please contact Client Services if you need assistance with this setup.

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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