

18 September 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

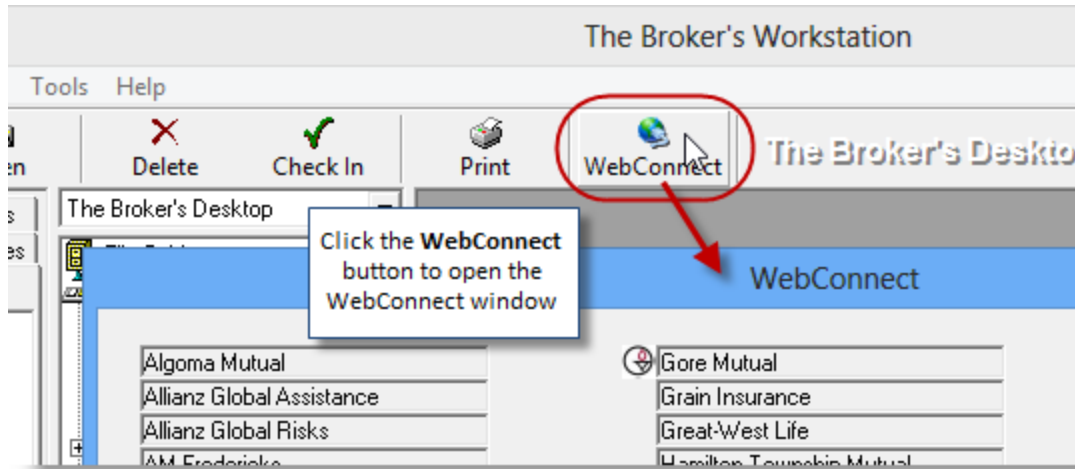
1. [Policy Inquiry for SMI using WebConnect](#) – In TBW WebConnect, services for Saskatchewan Mutual Insurance (SMI) now include the ability to perform a policy inquiry and attach the policy in HTML format to the applicable Client folder.

1. Policy Inquiry for SMI using WebConnect

In TBW WebConnect, services for Saskatchewan Mutual Insurance (SMI) now include the ability to perform a policy inquiry and attach the policy in HTML format to the applicable Client folder.

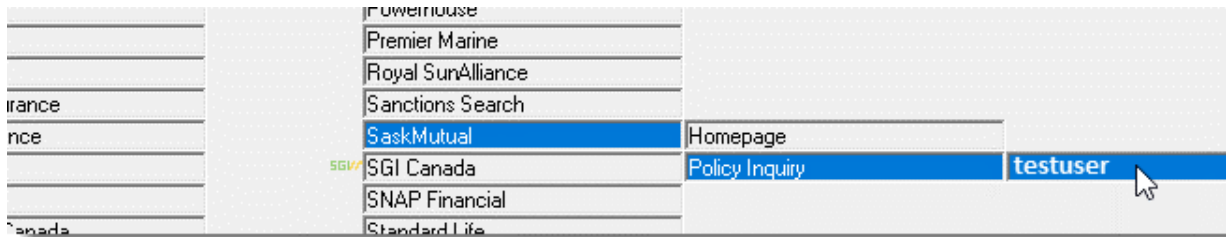
The WebConnect feature allows TBW users to access various insurance company and service bureau websites quickly and easily directly from the TBW interface. When you click the **WebConnect**  button on the TBW toolbar, the list of companies and services available through WebConnect displays in the WebConnect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

(Figure 1.1)



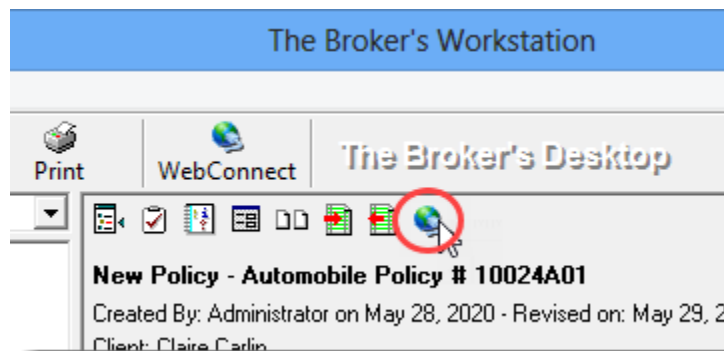
Once the simple, one-time setup (see below) has been completed for this feature, you can perform a policy inquiry for SMI using WebConnect as follows. Select **SaskMutual**, **Policy Inquiry**, and the applicable **Username** in the WebConnect window (see Figure 1.2).

(Figure 1.2)



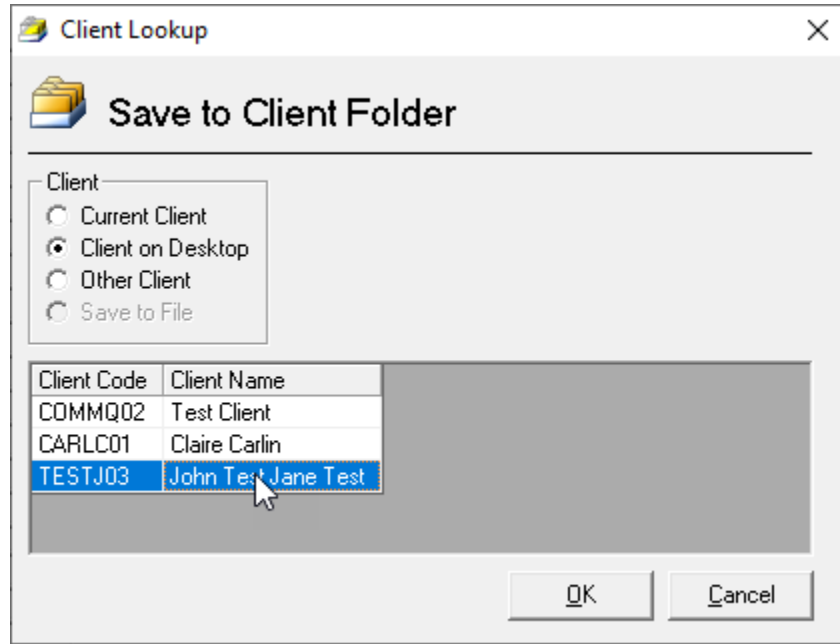
- Note that you can also initiate a policy inquiry from an SMI policy document. When you are viewing an SMI policy document in the TBW window, click the **WebConnect** button on the document toolbar (see Figure 1.3). Applicable inquiry details (e.g. policy number and insured's name) will be populated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

(Figure 1.3)



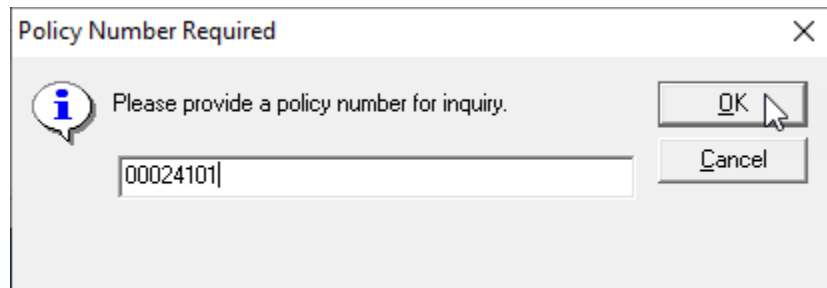
In the **Client Lookup** window, find and select the Client folder where the policy will be saved, and then click OK (see Figure 1.4).

(Figure 1.4)



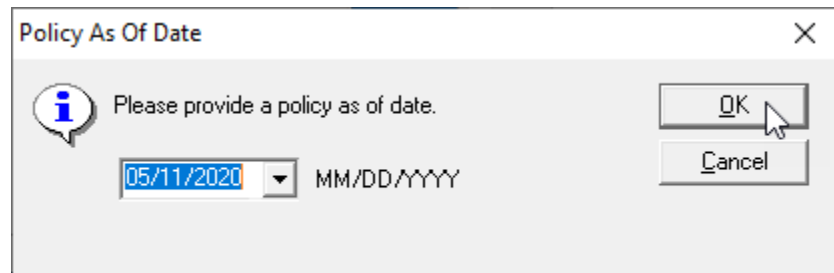
In the **Policy Number Required** pop-up, specify the policy number and click OK (see Figure 1.5).

(Figure 1.5)



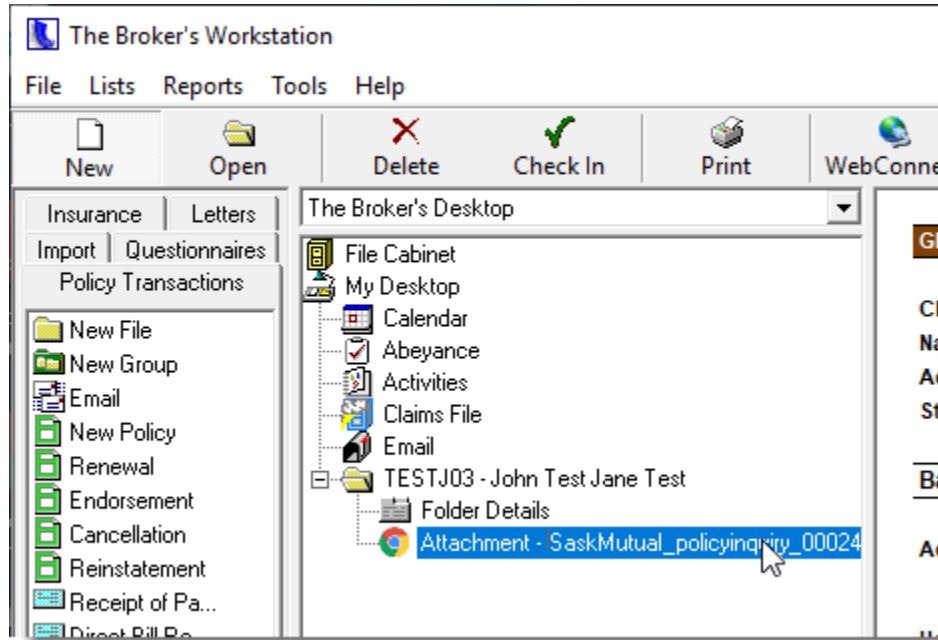
Enter the applicable date in the **Policy As Of Date** window and click OK (see Figure 1.6).

(Figure 1.6)



Once generated, the policy (in HTML format) will be attached to the applicable Client folder (see Figure 1.7). Double-click the file to open it in a separate web browser window and view policy details.

(Figure 1.7)



Setup for SMI Policy Inquiry

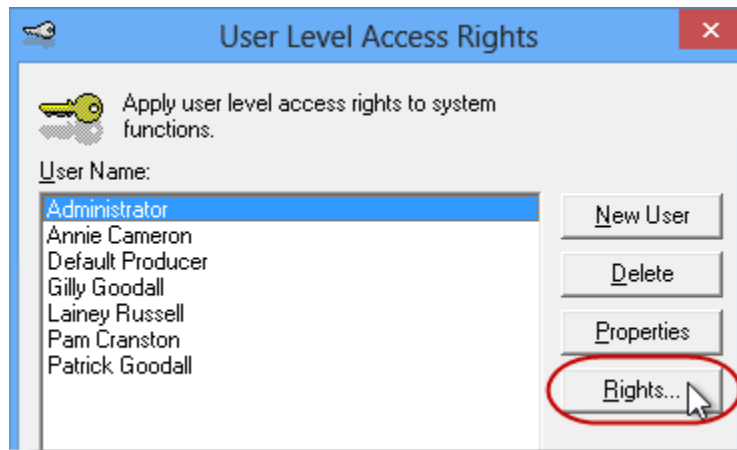
The following one-time setup for SMI Policy Inquiry must be completed in TBW before the functionality can be used.

Please note, users may already have completed the following setup steps (for User Rights and WebConnect). In this situation, these steps will only need to be completed for new users or if your office has never used any SMI WebConnect functions.

To set up SMI Policy Inquiry,

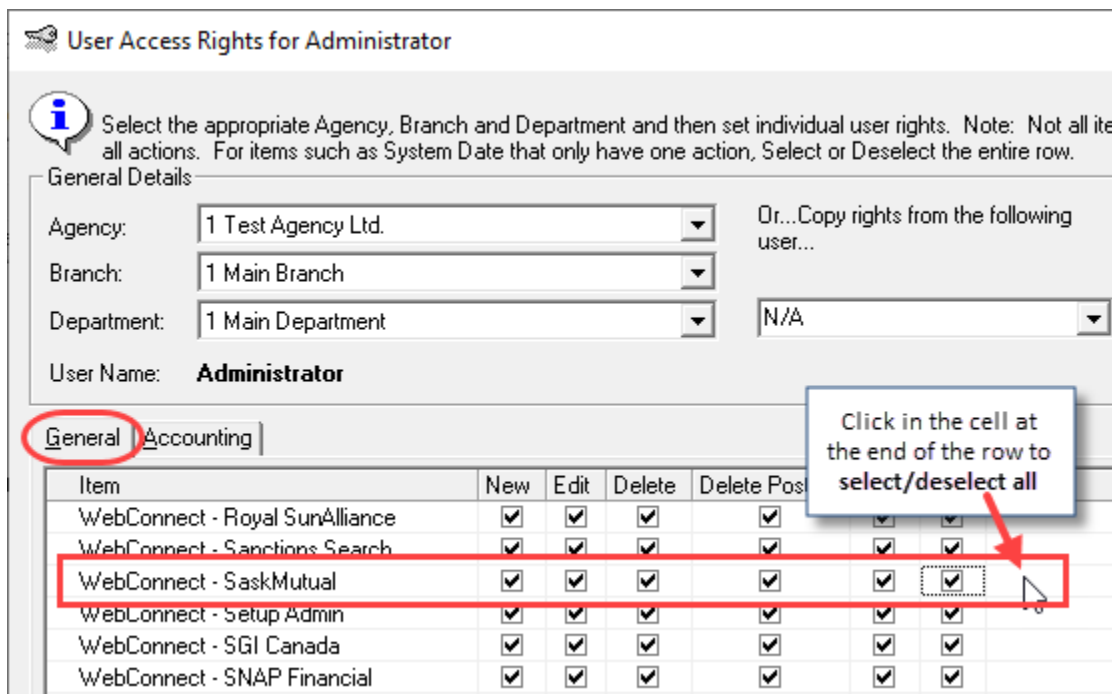
1. Confirm you have the required SMI User ID and Password.
 - This User ID and Password are required for WebConnect setup as described below. If you require a User ID and Password, please contact your SMI Personal Lines Representative for assistance.
2. Ensure appropriate **User Rights** for this feature are set up for applicable TBW users as follows.
 - a. Click **Tools, Administrative, User Manager**.
 - b. In the User Level Access Rights window, select the **Username** and then click the **Rights** button (see Figure 1.8).

(Figure 1.8)



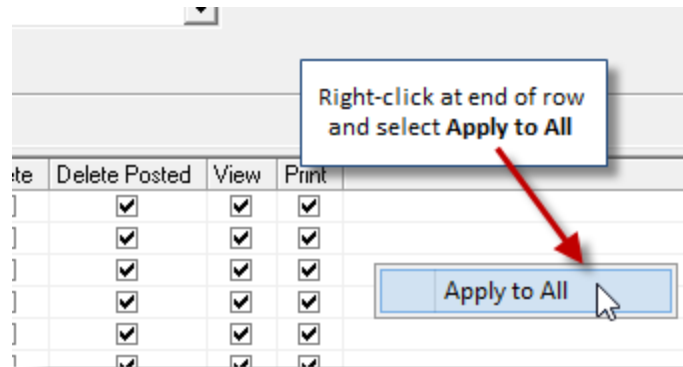
- c. On the **General** tab in the User Access Rights dialog, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – SaskMutual** (see Figure 1.9).

(Figure 1.9)



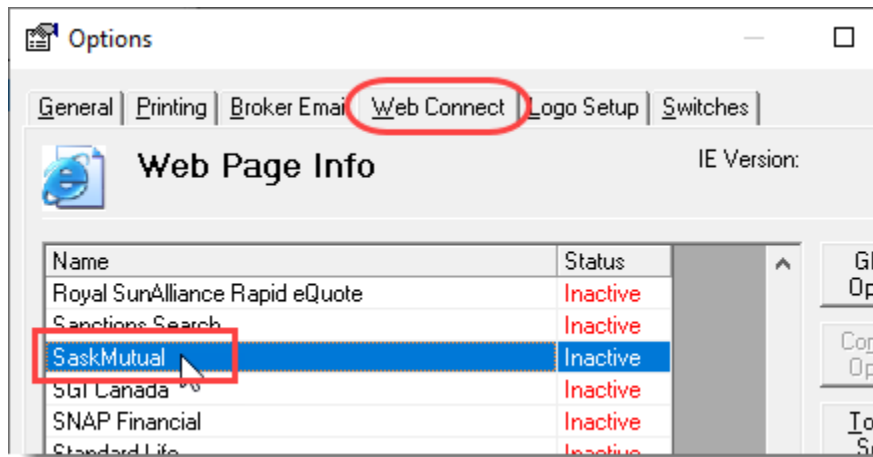
- d. Click **OK** in the User Access Rights window to save these rights for this user for this ABD, and then click **OK** in the Attention pop-up.
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – SaskMutual* to **all** ABDs for 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)



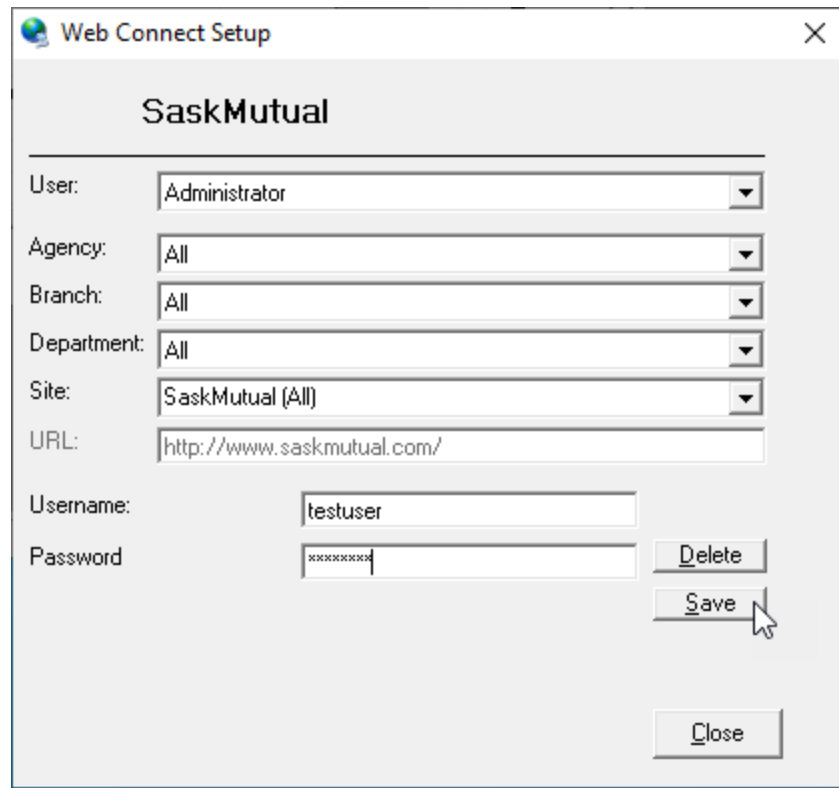
- f. Click **Close** in the User Access Rights window.
 - g. Repeat Steps b – f for each additional TBW user requiring these rights.
 - h. Click **OK** in the User Level Access Rights window.
3. Next, confirm each applicable user is set up for SMI in **WebConnect** as follows.
- a. Click **Tools, Options** in the TBW window.
 - b. On the **WebConnect** tab in the Options dialog, find and double-click **SaskMutual** (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, and Department).
 - iii. Ensure **SaskMutual (All)** is selected in the **Site** menu.
 - 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** pop-up.
 - 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 window.
4. Close TBW, run the TBW Update Utility, 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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