

IntelliQuote Software Update Required

Dear Client,

The Economical Insurance Group (TEIG) is making changes to its BC Homeowners rating structure for Economical Insurance and Waterloo Insurance. These changes will be effective January 1, 2012 for new business and March 1, 2012 for renewals.

With the help of The Economical Insurance Group, we are happy to assist you with the delivery of these changes. This upgrade will connect you directly to their system during your quoting process.

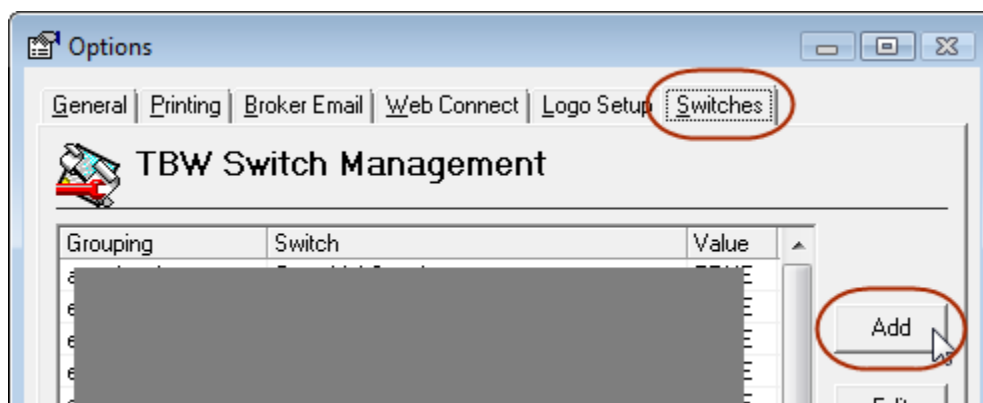
Aside from a simple one-time set-up to enter TEIG's credentials, you will continue to use IntelliQuote as you have in the past.

What do I need to get started?

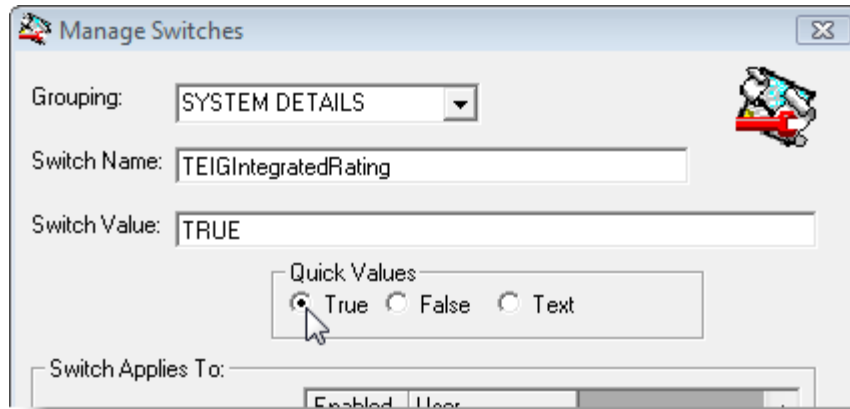
Ensure you have your credentials to access TEIG's Broker Extranet website. This includes your Broker Extranet User ID and Password. If, for any reason, you have difficulties with your password, you will need to contact the Help Desk and ask that the password be reset prior to completing the upgrade process. The Help Desk telephone number is 1-866-772-3065.

Set up Economical in TBW as follows:

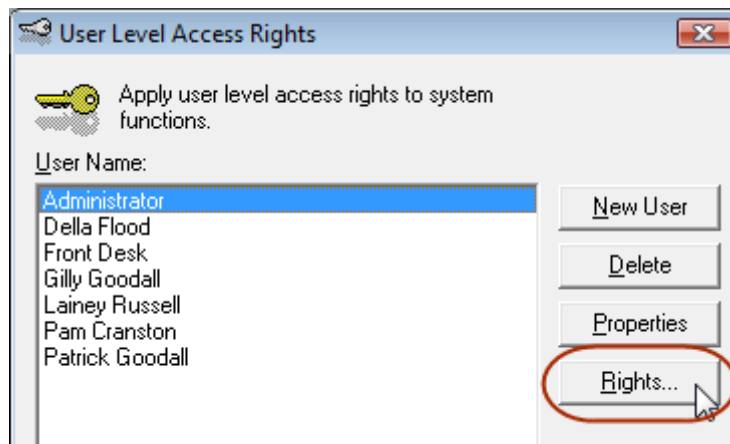
1. Open **TBW**.
2. To add the required switch,
 - a. Click **Tools, Options**.
 - b. In the **Options** dialog, click the **Switches** tab.
 - c. On the **Switches** tab, click the **Add** button.



- d. In the **Manage Switches** dialog, add switch details as follows:
 - i. In the **Grouping** field, select or enter **System Details**.
 - ii. In the **Switch Name** field, enter **TEIGIntegratedRating**.
 - iii. In the **Quick Values** area, click **True**.
 - The value **TRUE** will appear in the **Switch Value** field.



- iv. Click **Save**.
- e. Click **OK** in the **Options** dialog.
3. Close **TBW**, and run the **TBW Update Utility**.
4. Reopen **TBW**, and set **User Rights** for the TBW user as follows:
 - a. Click **Tools, Administrative, User Manager**.
 - b. In the **User Level Access Rights** dialog, click the **User Name** and then click the **Rights** button.



- 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 – The Economical Insurance Group Integrated Rating** in the **WebConnect** category.
 - To select all items in the row at once, click in the cell at the very end of the row.

User Access Rights for Administrator

Select the appropriate Agency, Branch and Department and then set individual user rights. Note: Not all items will use all actions. For items such as System Date that only have one action, Select or Deselect the entire row.

General Details

Agency: Or... Copy rights from the following user...

Branch:

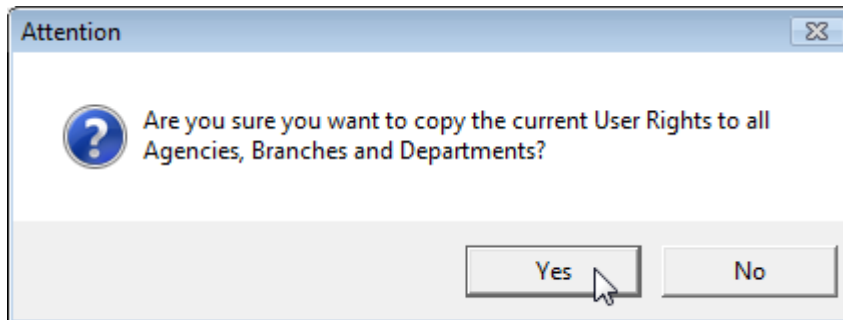
Department:

User Name: **Administrator**

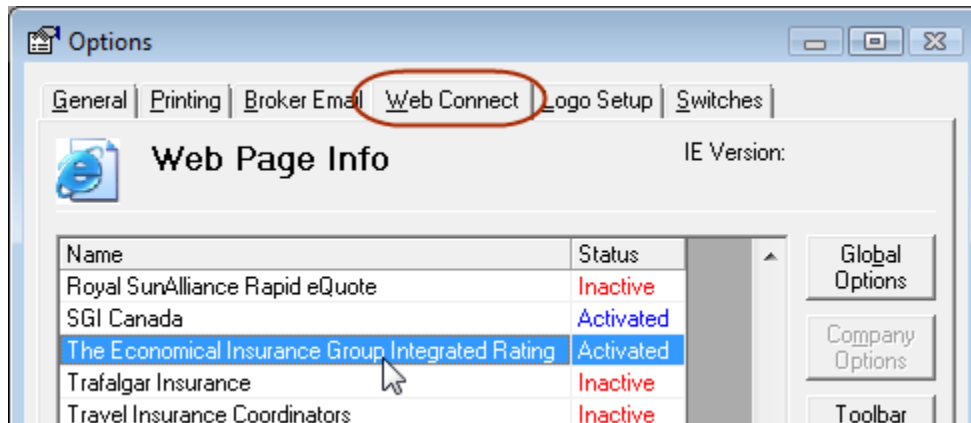
General | Accounting

Item	New	Edit	Delete	Delete Posted	View	Print
WebConnect - Setup Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WebConnect - SGI Canada	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WebConnect - Standard Autoglass	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WebConnect - The Economical Insurance Group Integrated Rating	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WebConnect - Toolbar Setup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WebConnect - Tottengroup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WebConnect - Trafalgar Insurance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- d. Click **Apply to All** in the **User Access Rights** window to save these user rights, and then click **Yes** in the **Attention** window.



- e. Click **OK**, and then click **Close** in the **User Access Rights** window.
- f. Repeat Steps b – e for each additional TBW user requiring these rights.**
- g. Click **OK** in the **User Level Access Rights** window.
5. To set up **WebConnect** for the Economical rating feature,
- Under **Tools**, click **Options**.
 - On the **WebConnect** tab in the **Options** window, find and double-click **The Economical Insurance Group Integrated Rating**.



- c. In the **WebConnect Setup** window,
 - i. Select the **User**.
 - ii. Select the applicable **Agency, Branch, and Department**.
 - iii. Enter the applicable **Username** and **Password**.
 - iv. Click **Save**.

**The Economical Insurance Group
Integrated Rating Web Setup**

User:

Agency:

Branch:

Department:

URL:

Username:

Password:

- v. Repeat **steps i – iv** as necessary to set up WebConnect for each user who will be utilizing this feature.
- vi. Click **Close**.

- *Be sure to update your WebConnect Setup details if you reset your Economical Extranet password (Note: Access IDs and passwords with TEIG are non-expiring).*
- d. Click **OK** in the **Options** window.

If any users in the brokerage have forgotten their passwords (i.e. 8- or fewer-digit non-expiring passwords they have chosen themselves), they must contact the Economical Helpdesk at 1-866-772-3065 to ask that the passwords be reset. Once a password has been reset, the user can utilize the **Password Update Link** on the Economical website to set the password back to something of his/her choosing, and then update the password in TBW setup.

If any messages not covered in this document appear during usage, or if you need any technical support during setup, please contact the CSSI Client Services Team at clientservices@cssionline.com (email) or 1-888-291-3588 (toll-free telephone).