



6 November 2017

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

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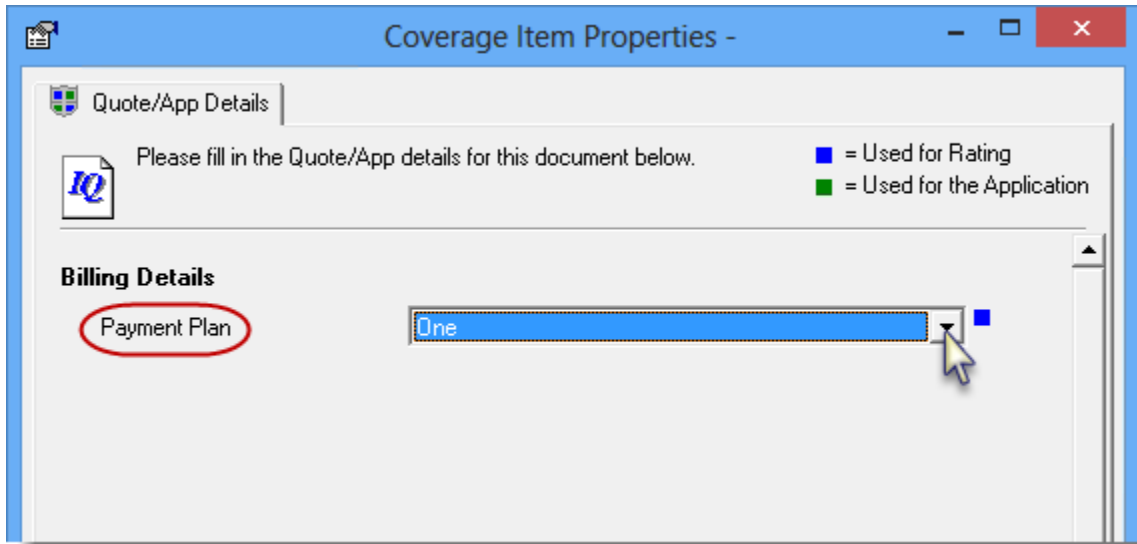
1. [One Pay Discount Option for Intact Auto IQ \(NB\)](#) – Brokers in New Brunswick who do business with Intact can now select the One Pay Discount for qualifying risks while creating an Auto IntelliQuote.

1. One Pay Discount Option for Intact Auto IQ (NB)

Intact Insurance New Brunswick has introduced a 5% One Pay Discount on Private Passenger Vehicle (PPV) risks, effective November 22, 2017 for new business and December 22, 2017 for renewals. Brokers in New Brunswick who do business with Intact can manually apply the One Pay Discount for qualifying risks while creating or modifying an Auto IntelliQuote.

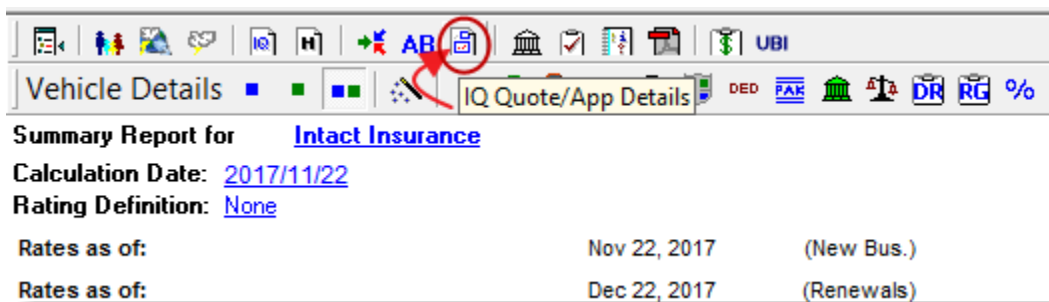
Create a Personal Lines Auto IQ for Intact in the usual manner. As you work through the windows to enter the required information for the IQ, the **Quote/App Details** screen will display. To apply the discount, ensure **One** is selected in the **Payment Plan** drop-down menu (see Figure 1.1), and click **OK**.

(Figure 1.1)



- To adjust the payment plan selection in an existing Intact Auto IQ, click the **Quote/App Details** button on the **IQ toolbar** (see Figure 1.2) to open the Quote/App Details dialog and make the appropriate selection.

(Figure 1.2)



When the One Pay Discount has been applied, this discount will display in the IntelliQuote *Coverage Report*, *Summary Report*, and *Outline View* (see Figures 1.3, 1.4, and 1.5).

(Figure 1.3)

Vehicle Details

Coverage Report
 Calculation Date: 2017/11/22
 Rating Definition: None

Intact Insurance

- Private Passenger Vehicle
 - (1) 2016 ACURA TRUCK/VAN MDX 4DR 2WD

| | |
|----------------------|--------------|
| Liability | 1000000 |
| Accident Benefits | Yes |
| Location Factor | Territory B2 |
| Type of Coverage | Coll/Comp |
| Driver Class | 1 |
| Driver Record (TPL) | 7 |
| Driver Record (Coll) | 7 |
 - Rate Groups
 - Discounts/Surcharges

| | |
|-----------------------------------|------------|
| 05 Conviction Free Discount | -20% |
| 05 My Driving Enrollment Discount | -10% |
| 05 My Home & Auto Discount | -12.5% |
| Conviction Free Discount | -20% |
| Low Mileage Discount | -15% |
| My Driving Enrollment Discount | -10% |
| My Home and Auto Discount | -12.5% |
| One Pay Discount | -5% |
 - Deductibles

Coverage Report | Summary Report(s) | Outline View(s) | Alerts | Compari

(Figure 1.4)

| Comp Rate Group | | 41 |
|--|-------------|-------|
| Third Party Liability | | |
| No Fault BI | \$1,000,000 | \$737 |
| - Multi-Vehicle Discount | | |
| - Multi Policy Discount | | |
| - New Business Loyalty Discount | | |
| - Driver Experience Discount | | |
| - Conviction Free Discount | (20%) | \$590 |
| - Conviction Surcharge | | |
| - Low Mileage Discount | (15%) | \$502 |
| - Hybrid Discount | | |
| - Occupation Discount | | |
| - My Driving Enrollment Discount | (10%) | \$452 |
| - One Pay Discount | (5%) | \$429 |
| - My Home and Auto Discount | (12.5%) | \$375 |
| - Capped My Home and Auto Discount | | |
| - TPL BI Total | | \$375 |
| Coverage Report / Summary Report(s) / Outline View(s) / Alerts / Comparison Report | | |

(Figure 1.5)

| | | | | |
|--------------------------------|--|---------|--|------|
| End. # 27 - Phys. | | \$22 | | \$22 |
| End. # 44 - Family | | \$14 | | \$14 |
| Discounts/Surcharges | | | | |
| Conviction Free Discount | | (20%) | | |
| Low Mileage Discount | | (15%) | | |
| My Driving Enrollment Discount | | (10%) | | |
| One Pay Discount | | (5%) | | |
| My Home and Auto Discount | | (12.5%) | | |
| 05 Conviction Free Discount | | (20%) | | |

The One Pay Discount will also pull forward automatically to an Application for Intact and display in the **Rate Calculation Report** (see Figure 1.6).

(Figure 1.6)

| The Broker's Workstation Intact Insurance Rate Calculation Report | | |
|--|--------------|------|
| Broker Client ID: TEST023 | | |
| Rates as of: | Nov 22, 2017 | (Ne |
| Rates as of: | Dec 22, 2017 | (Re |
| Private Passenger Vehicle | | |
| 2016 ACURA TRUCK/VAN MDX 4DR 2WD (1760) | | |
| (Principal) Test Driver | Age: 74 | Yrs |
| (Occasional) Test Driver 2 | Age: 22 | Yrs |
| Rating Territory | Territory B2 | |
| Driver Class | 01 | |
| Driver Record | 7 | |
| Vehicle Use | Pleasure | |
| AB Rate Group | 8 | |
| Comb Rate Group | 20 | |
| Comp Rate Group | 41 | |
| Third Party Liability | | |
| No Fault BI | \$1,000,000 | \$73 |
| - Multi-Vehicle Discount | | |
| - Multi Policy Discount | | |
| - New Business Loyalty Discount | | |
| - Driver Experience Discount | | |
| - Conviction Free Discount | (20%) | \$59 |
| - Conviction Surcharge | | |
| - Low Mileage Discount | (15%) | \$50 |
| - Hybrid Discount | | |
| - Occupation Discount | | |
| - My Driving Enrollment Discount | (10%) | \$45 |
| - One Pay Discount | (5%) | \$42 |
| - My Home and Auto Discount | (12.5%) | \$37 |
| - Capped My Home and Auto Discount | | |
| - TPL BI Total | | \$37 |

Please note the following eligibility criteria for the Intact One Pay Discount:

- The discount is applicable for PPV risks only.
- All Direct Bill One Pay types (including One Pay EFT) will receive the discount.
- The discount does not apply to Agency Bill.
- The discount applies to the Principal Driver premium only.
- Eligible Coverages include the following:
 - Liability – Bodily Injury and Property Damage
 - Direct Compensation – Property Damage
 - Accident Benefits
 - All Perils
 - Collision
 - Comprehensive
 - Specified Perils

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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)

To unsubscribe from our email notifications and updates, please contact us at info@cssionline.com or reply to this email.