



31 March 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 enhancement to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

Contents

1. [SGI Online Quoting](#) – Effective May 15, 2017 for New Business and Renewals; Brokers in Manitoba, Saskatchewan and Alberta who write business with SGI CANADA can now access SGI CANADA's Online Quoting directly from TBW and IntelliQuote for Condo and Tenant policies including Farm Tenant and Condo in the same manner as you currently do for your Home and Farm Home quotes.

SGI Online Quoting

Effective May 15, 2017 for New Business and Renewals; Brokers in Manitoba, Saskatchewan and Alberta who write business with SGI CANADA can now access SGI CANADA's Online Quoting directly from TBW and IntelliQuote for Condo and Tenant policies including Farm Tenant and Condo. This integration of IntelliQuote with SGI CANADA's web service allows the broker to view web-service-based premium calculations for Condo and Tenant policies including Farm Tenant and Condo in IntelliQuote.

Please note the following when using the Quoting Tool for habitational policies:

- Brokers can quote up to 45 days in advance with the Quoting Tool.
- Online rating will be for Primary Residence/Location and Endorsements. Misc. Property (including additional residences) and Liability Extensions will still be rated through TBW's rating engine.

- Please ensure the Agency, Branch, and Department match what was set up for the Broker Number for SGI CANADA under Insurance Companies in TBW Lists.
- Please use the policy number for all renewals to ensure the correct loyalty and claims free discounts are applied.

New fields added to support Tenant and Condo processing through RateBridge are:

- Number of Families
- Swimming Pool
- Number of Bedrooms

Coverage Item Properties - Primary Item

General Details | Construction Details | Legal Location | Location Factors | Protection | Heating | Coverage Limits | Type of Coverage | Deductible | Misc. | Liability | Mortgages

Enter the General Details for this coverage item.

Description: [Text Box]

Year Built: 2005

Number of Suites: [Text Box]

Number of Families: 1

Number of Acres: [Text Box]

Occupancy: Owner

Birthdate of Eldest Occupant: 03/15/1953

First Time Insured: No

Building Resident Since: 09/01/2015

Under Construction: No

Rooming/Boarding House: No

Bareland Condo: No

Part 2 Remarks: [Text Box]

Weeks Rented: [Text Box]

Which Floor: 1

Condition of Property: [Text Box]

Swimming Pool

Swimming Pool: [Dropdown Menu]

Fenced: No

Buttons: Set Defaults, OK, Cancel

Coverage Item Properties - Primary Item

General Details | **Construction Details** | Legal Location | Location Factors | Protection | Heating | Coverage Limits | Type of Coverage | Deductible | Misc. | Liability | Mortgages

Enter the General Details for this coverage item.

Number Of Bedrooms: [Text Box]

Total Living Area (Sq Ft): 980

New fields added to support Tenant processing through RateBridge are:

- Life Lease
- Commercial Building Type

Coverage Item Properties - Primary Item

General Details | Construction Details | Legal Location | Location Factors | Protection | Heating | Coverage Limits | Type of Coverage | Deductible | Liability | Mortgages

Enter the General Details for this coverage item.

■ = Used for Rating
■ = Used for the Application

Description: [Text Box]

Year Built: 1995

Number of Suites: 32

Number of Families: 1

Number of Acres: [Text Box]

First Time Insured: No

Building Resident Since: 02/01/2013

Under Construction: No

Rooming/Boarding House: No

Part 2 Remarks: [Text Box]

Life Lease: No

Mercantile Number of Suites: 2

Weeks Rented: [Text Box]

Which Floor: 1

Condition of Property: [Text Box]

Swimming Pool

Swimming Pool: None

Fenced: No

Buttons: Set Defaults, OK, Cancel

Coverage Item Properties - Primary Item

General Details | **Construction Details** | Legal Location | Location Factors | Protection | Heating | Coverage Limits | Type of Coverage | Deductible | Liability | Mortgages

Enter the General Details for this coverage item.

■ = Used for Rating
■ = Used for the Application

Number of Bedrooms: 2

Total Living Area (Sq Ft): 980

Total Living Area (Sq Meters): [Text Box]

Building Attachment Type: Detached

Roof: Asphalt Shingle

Asbestos: No

Number of Outbuildings: [Text Box]

Building Type: Apartment Building

Number of Stories: 6

Commercial Building Type: None



After reviewing this document, please contact our Client Services Team at 1-888-291-3588 (toll-free telephone) or clientservices@cssionline.com (email) with any questions you have. For questions regarding the feature itself, please contact your SGI CANADA Personal Lines representative for assistance.

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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 this feature 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 and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.



Microsoft Partner

Gold Independent Software Vendor (ISV)