



10 September 2018

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. [Gore Mutual Online Quoting for Primary Home Policies \(BC\)](#) – Brokers who write business in British Columbia with Gore Mutual Insurance can access Gore Mutual's Online Quoting directly from TBW and IntelliQuote for Primary Home policies, effective September 15, 2018 for new business and November 1, 2018 for renewals.

1. Gore Mutual Online Quoting for Primary Home Policies (BC)

Brokers who write business in British Columbia with Gore Mutual Insurance can access Gore Mutual's Online Quoting directly from TBW and IntelliQuote for Primary Home policies, effective September 15, 2018 for new business and November 1, 2018 for renewals.

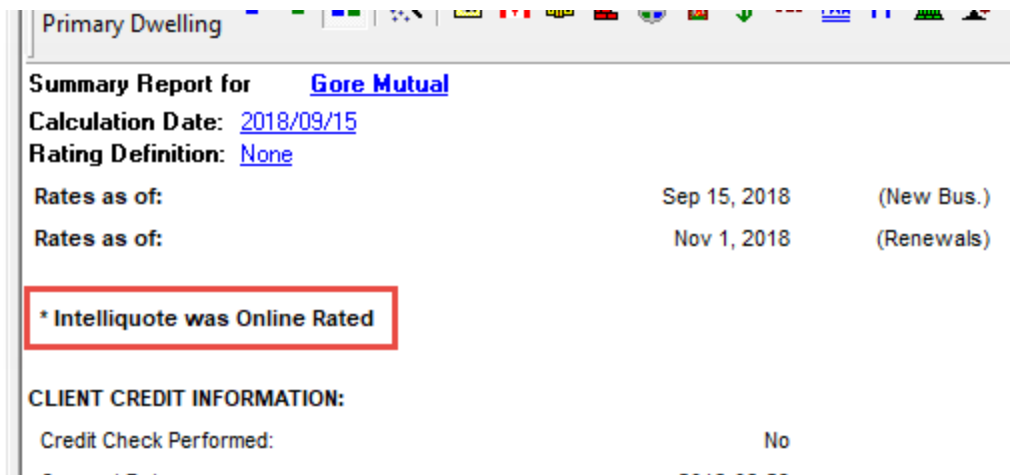
What this will mean for you, the broker, is that Gore Mutual rates for Primary Home policies will always be up-to-date and available to you real-time, because the rates will come directly and immediately from Gore's system through a web call. This streamlined quoting process, with improved rating accuracy and rate updates in real-time, will enhance the customer experience, and enable you to do business more efficiently and responsively.

No setup is required for this feature. Gore's web service will automatically be called whenever you click the Recalculate button on the IQ toolbar for a Gore Homeowners IQ with a Calculation Date on or after September 15 for new business / on or after November 1 for renewals. The results of the web service call will be displayed immediately on the Summary Report tab in the IQ, and any alerts that have been returned from the web service will instantly be displayed on the Alerts tab, as well.

Please note the following when using the Gore Mutual Online Quoting feature for Primary Home policies:

- **Online Quoting can be used for current (today's date) rating and forward rating, but it will not provide quotes on a backdated effective or calculation date.** As such, for Online Quoting, please ensure the effective date or calculation date is always set to the current or a future date, rather than a past date.
- Online rating will be for Primary Residence/Location, Endorsements, and Liability Extensions. Additional residences will still be rated through TBW's rating engine.
- The Gore Credit Score feature has been integrated with the Online Quoting functionality, and no separate web service call will be made for Credit Scoring. Credit Score consent details can be entered in the usual manner while an IQ is being created or modified.
- When a pre-existing Gore Homeowners IQ is opened, it will continue to use TBW's local rating engine for quoting unless the Calculation Date is changed.
- The use of Online Quoting will display on the Summary Report tab in the IntelliQuote (see Figure 1.1).

(Figure 1.1)



If you have any questions regarding the Gore Mutual Online Quoting feature, please contact your Gore Mutual Personal Lines representative for assistance.

[Return to Contents](#)

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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