

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. [TBW Now Offers Intact New Business Upload \(PE\)](#) – CSSI's The Broker's Workstation and IntelliQuote are now connected with Intact's new business upload web service, allowing brokers doing business with Intact in Prince Edward Island to upload Personal Lines Auto and Property new business policies.

1. TBW Now Offers Intact New Business Upload (PE)

CSSI's The Broker's Workstation and IntelliQuote are now connected with Intact's new business upload web service, allowing brokers doing business with Intact in Prince Edward Island to upload Personal Lines Automobile and Property (Home, Condo, and Tenant) new business policies. This integration allows for improved efficiencies company-wide and for Intact to optimize their partnerships with independent insurance brokers.

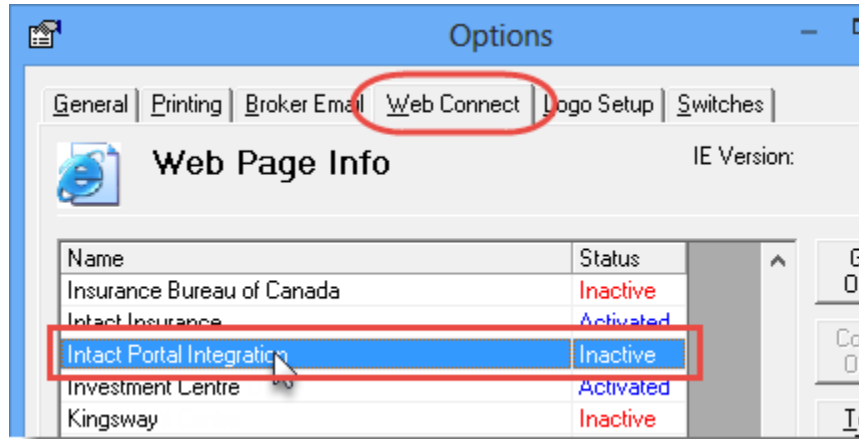
The following one-time setup must be completed in TBW for the Intact New Business Upload feature before the functionality can be used.

To set up the Intact New Business Upload feature in TBW,

1. Ensure you have the required Intact User ID and Password.
 - If you require a User ID and Password, please contact your Intact Personal Lines representative for assistance.
2. In the TBW window, click **Tools, Options**.

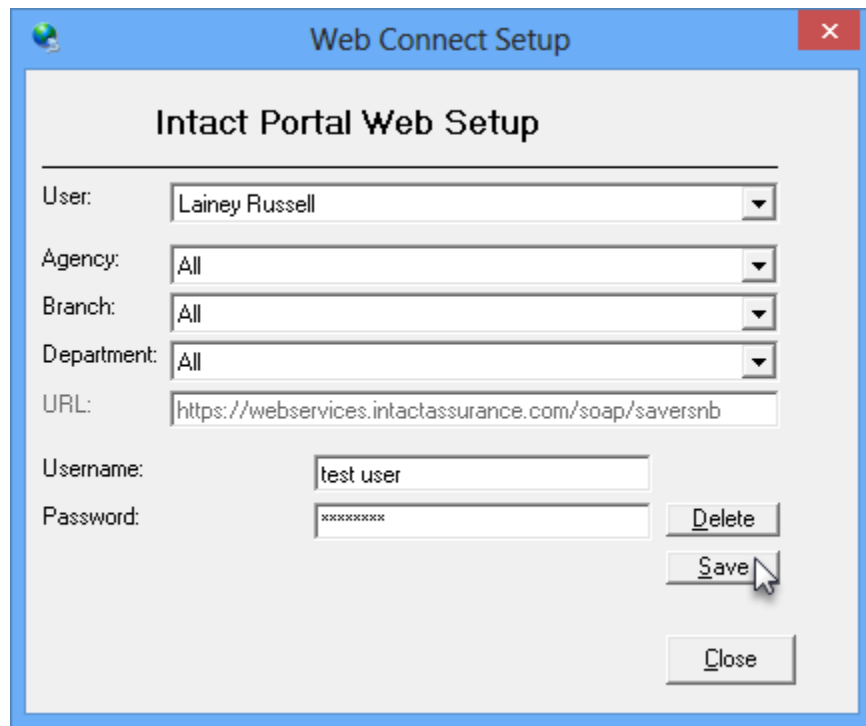
3. On the **WebConnect** tab in the **Options** dialog, find and double-click **Intact Portal Integration** (see Figure 1.1).

(Figure 1.1)



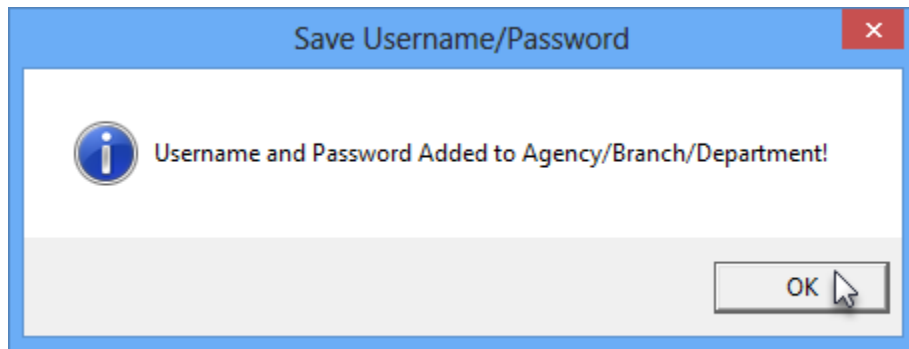
4. In the WebConnect Setup dialog,
 - a. Select the applicable **User**.
 - b. Select **All** or the applicable **Agency/Branch/Department (ABD)**.
 - c. Enter the appropriate **Username** and **Password**.
 - d. Click **Save** (see Figure 1.2).

(Figure 1.2)



- e. Click **OK** in the **Save Username/Password** box (see Figure 1.3).

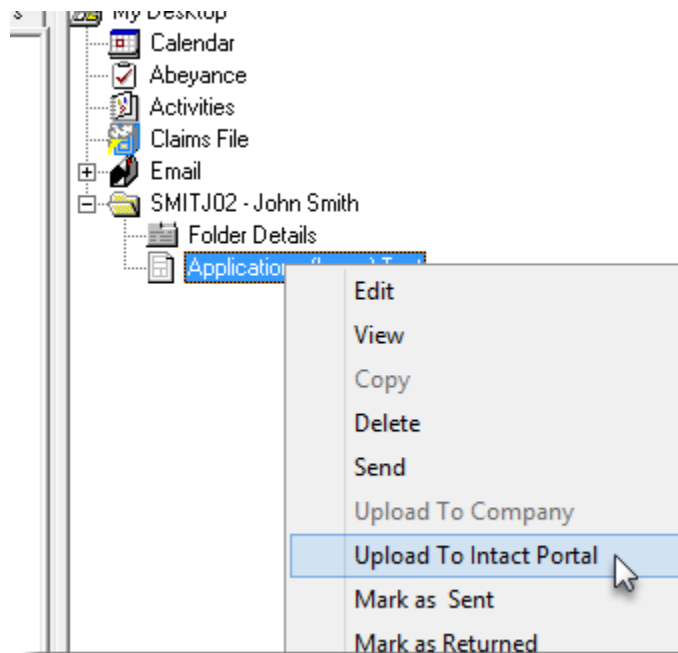
(Figure 1.3)



- f. Repeat these steps as required for additional ABDs and/or Users for this feature.
g. Click **Close** in the WebConnect Setup dialog.
5. Click **OK** in the Options dialog.
- *Be sure to update WebConnect Setup details whenever you reset your Password.*

Once you have completed a personal lines Automobile or Property new business application for Intact, right-click the application document in the Desktop Tree in the TBW window, and select **Upload to Intact Portal** (see Figure 1.4).

(Figure 1.4)



TBW will then launch a web browser window that will take you to the application page on the Intact website. Verify the details of the application, adding additional information, if required. Intact will issue the policy from the information provided.

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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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