

25 June 2018

To: Users of The Broker's Workstation and/or The Underwriter's Workstation

Dear Valued Client:

Re: Important Releases and Changes for The Broker's Workstation and The Underwriter's Workstation

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)**:

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1. [RSA Online Quoting for Homeowners Policies \(AB\)](#) – Brokers in Alberta who write business with Royal and Sun Alliance (RSA) can now access the Online Quoting feature directly from TBW and IntelliQuote for Homeowners policies, effective June 29, 2018 for new business and August 29, 2018 for renewals. Additional fields and selections have been added to IntelliQuote to support RSA Online Quoting.

1. RSA Online Quoting for Homeowners Policies (AB)

Brokers in Alberta who write business with Royal and Sun Alliance (RSA) can now access the Online Quoting feature directly from TBW and IntelliQuote for Homeowners policies, effective June 29, 2018 for new business and August 29, 2018 for renewals.

What this will mean for you, the broker, is that RSA rates for Homeowners policies will always be up-to-date and available to you real-time, because the rates will come directly and immediately from RSA'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.

Once the simple, one-time setup for this feature has been completed, RSA's web service will automatically be called whenever you click the Recalculate button on the IQ toolbar for an RSA Homeowners IQ with a Calculation Date on or after June 29 for new business / on or after August 29

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.

Here are a few points to keep in mind when you are using the RSA Online Quoting feature:

- **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.
- The Online Quoting feature is currently applicable only for Homeowners policies (including *Broad, Comprehensive, and Platinum Plus* types for RSA).
- The Online Quoting feature is available for new policies, as well as renewal quoting and endorsement quoting.
- Please note, due to rate capping on renewal policies, when performing an online quote and rating with RSA, the online quote rate may not match the renewal rate.
- When a pre-existing Homeowners IQ is opened, it will continue to use TBW's local rating engine for quoting unless the Calculation Date is changed.

Setup for RSA Online Quoting

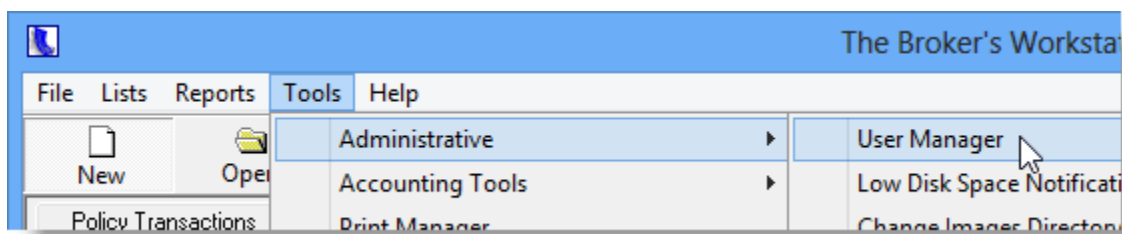
The following one-time setup for the RSA Online Quoting feature must be completed in TBW before the functionality can be used.

Please note, users may already have completed the following setup steps (User Rights and WebConnect). In this situation, these steps will only need to be completed for new users or if your office has never used any RSA WebConnect functions.

To set up the RSA Online Quoting feature,

1. Ensure you have the required RSA User ID and Password.
 - If you require a User ID and Password, please contact your RSA Personal Lines representative for assistance.
2. Ensure appropriate **User Rights** for this feature are set up for applicable TBW users as follows:
 - a. In the TBW window, click **Tools, Administrative, User Manager** (see Figure 1.1).

(Figure 1.1)



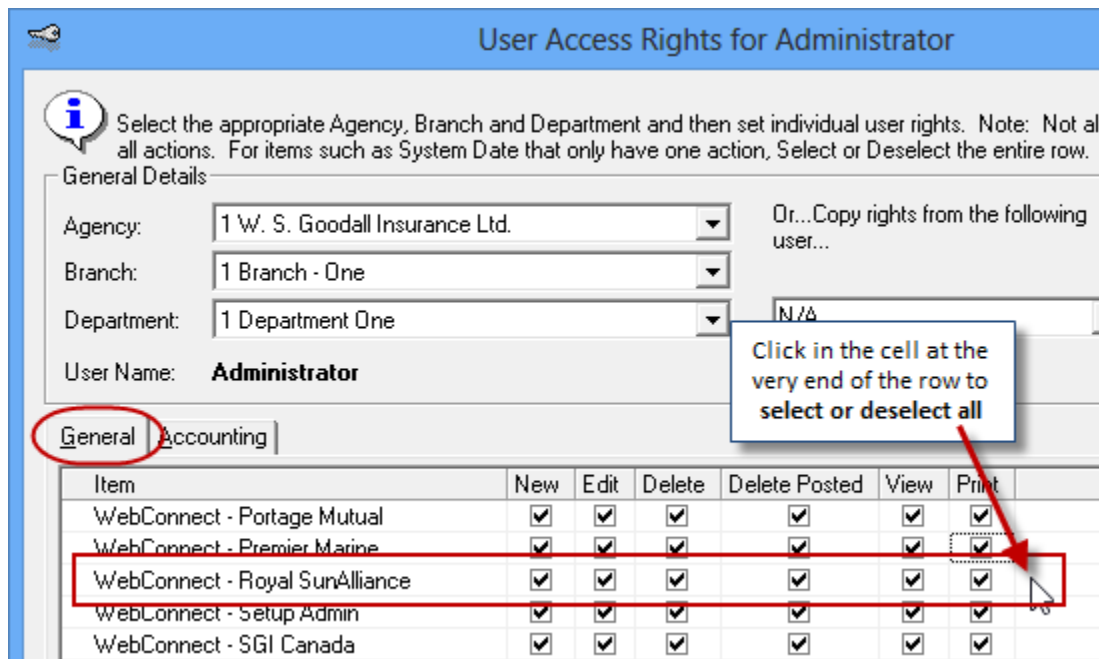
- b. In the **User Level Access Rights** dialog, select the **User Name** and then click the **Rights** button (see Figure 1.2).

(Figure 1.2)



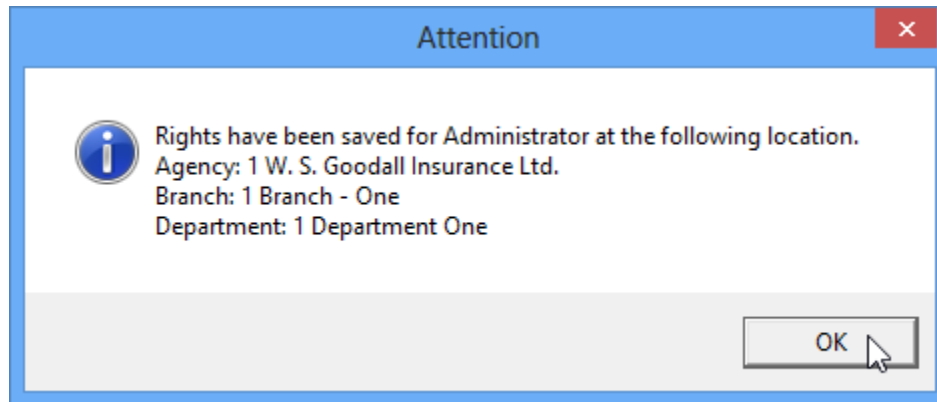
- c. On the **General** tab in the **User Access Rights** dialog, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Royal SunAlliance** (see Figure 1.3).

(Figure 1.3)



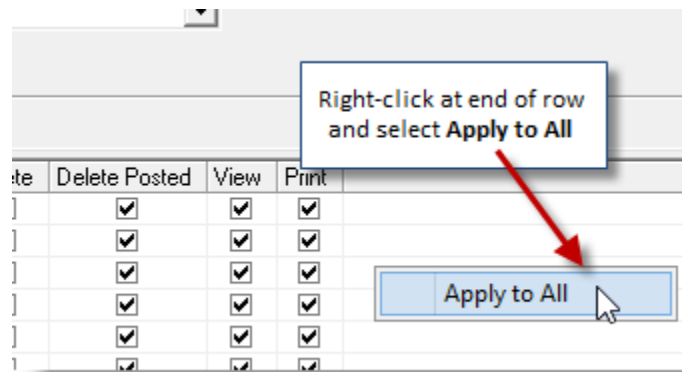
- d. Click **OK** in the **User Access Rights** window to save these rights for this user for this ABD, and then click **OK** in the **Attention** window (see Figure 1.4).

(Figure 1.4)



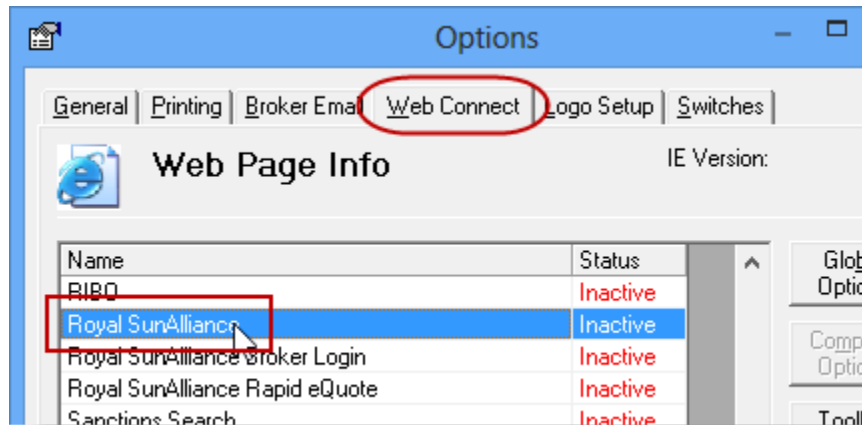
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – Royal SunAlliance* to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.5).

(Figure 1.5)



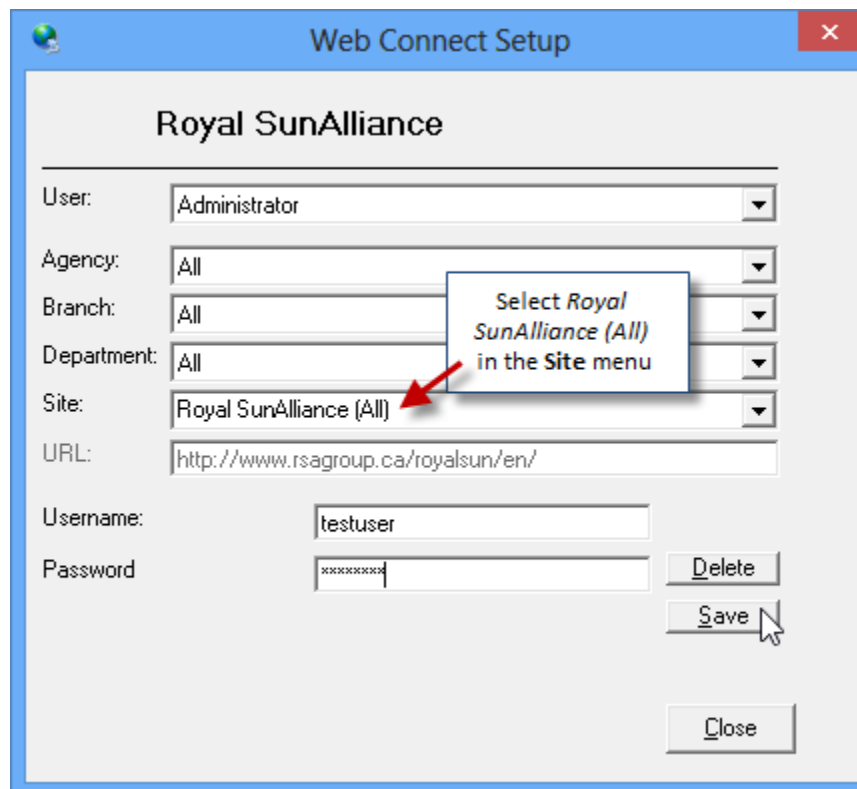
- f. Click **Close** in the **User Access Rights** window.
 - g. Repeat Steps b – f for each additional TBW user requiring these rights.
 - h. Click **OK** in the **User Level Access Rights** window.
3. Next, for any user *not* currently set up for RSA in WebConnect, follow these steps:
 - a. Click **Tools, Options** in the TBW window.
 - b. On the **WebConnect** tab in the **Options** dialog, find and double-click **Royal SunAlliance** (see Figure 1.6).

(Figure 1.6)



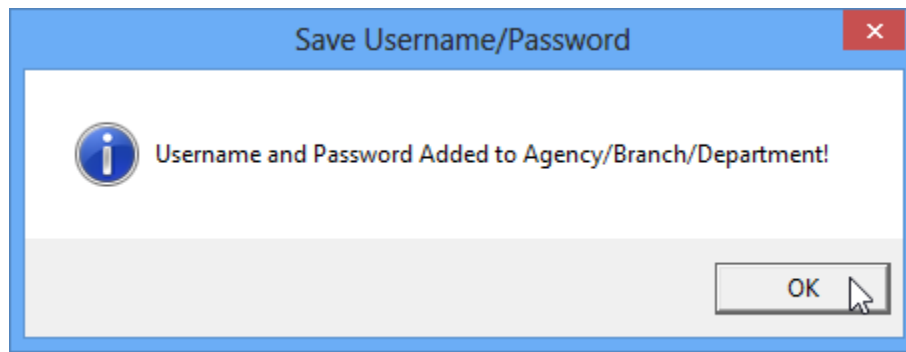
- c. In the **WebConnect Setup** window,
 - i. Select the applicable **User**.
 - ii. Select **All** or the applicable **ABD** (Agency/Branch/Department).
 - iii. In the **Site** menu, select **Royal SunAlliance (All)**.
 - iv. Enter the appropriate **Username** and **Password**.
 - v. Click **Save** (see Figure 1.7).

(Figure 1.7)



- vi. Click **OK** in the **Save Username/Password** box (see Figure 1.8).

(Figure 1.8)



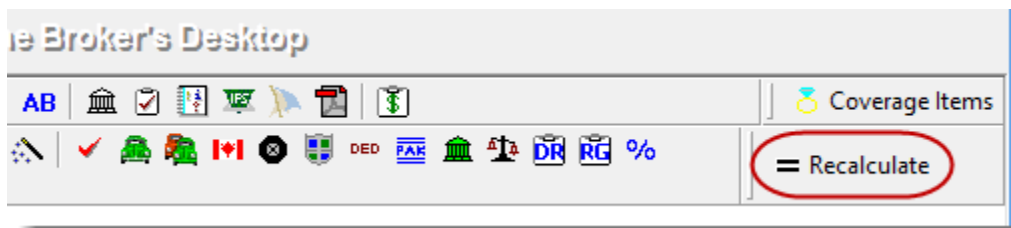
- vii. Repeat these steps as necessary for additional ABDs and/or Users.
- viii. Click **Close** in the WebConnect Setup dialog.
 - o *Be sure to update your WebConnect Setup details whenever you reset your password.*

- d. Click **OK** in the Options dialog.

4. Close TBW and then reopen the program.

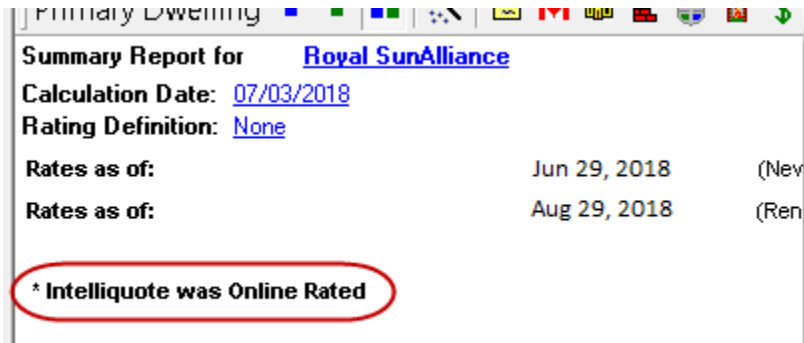
Now that the one-time setup has been completed, RSA's web service will be called when the TBW user clicks the **Recalculate** button on the IntelliQuote toolbar when creating a new or modifying an existing RSA Homeowners IntelliQuote (see Figure 1.9).

(Figure 1.9)



The results of the web service call will be displayed on the **Summary Report** tab in the IntelliQuote. Note that use of online rating will also be indicated in the IntelliQuote (see Figure 1.10).

(Figure 1.10)

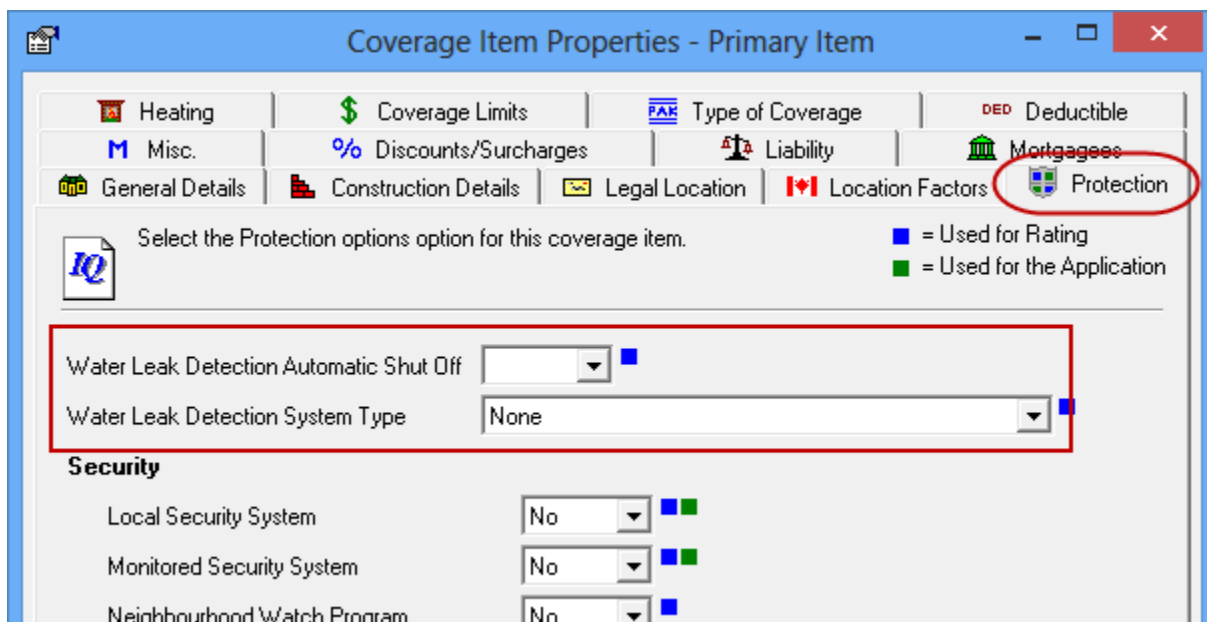


Additions and Changes in IQ

A number of additions and changes have been made in IntelliQuote to support the RSA Online Quoting feature. Please note the following additions and changes when you are creating a new or modifying an existing RSA Homeowners IQ:

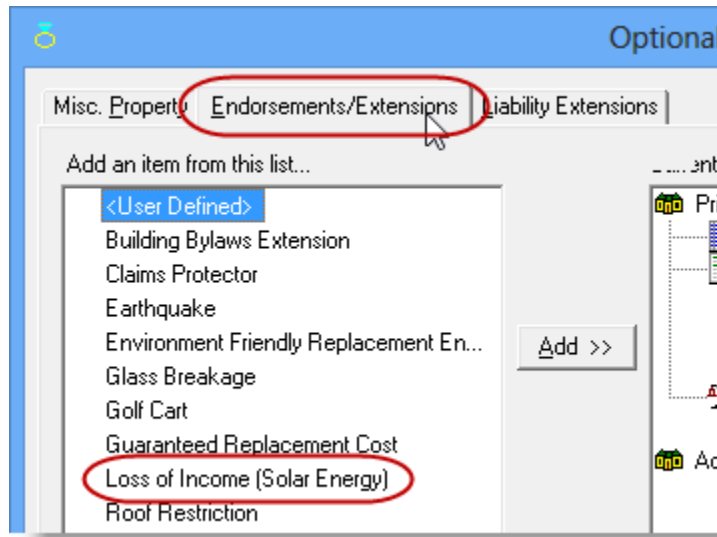
- On the **Protection** tab in Coverage Items Properties, the **Water Leak Detection Automatic Shut Off** and **Water Leak Detection System Type** fields are available (see Figure 1.11).

(Figure 1.11)



- For the primary item **Deductible**, a value of \$10,000 is now available for selection.
- A new rating factor to indicate jewellery as a scheduled item has been introduced.
- The **Selling Back to Power Grid** endorsement can now be added in IntelliQuote. In the Optional Coverages dialog, the Selling Back to Power Grid endorsement is available on the Endorsements/Extensions tab, where it is called "**Loss of Income (Solar Energy)**" (see Figure 1.12).

(Figure 1.12)



- In the IQ Summary Report, “Incl.” (rather than the percentage) will display for applicable **Discounts/Surcharges** (see Figure 1.13).

(Figure 1.13)

Dwelling:	\$500,000	
Personal Property:	\$350,000	
Outbuildings:	\$50,000	
Miscellaneous Discounts/Surcharges		
- Mature Citizen Dis. Applied		Incl.
- Claims Free Dis. Applied		Incl.
- Broker Loyalty Dis. Applied		Incl.
- Mortgage Free Dis. Applied		Incl.

Please contact our Client Services Team at clientservices@cssionline.com (email) or 1-888-291-3588 (toll-free telephone) with any questions you have about the setup for the RSA Online Quoting feature. For questions regarding the feature itself, please contact your RSA 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 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,

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