

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

### *Contents*

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1. [WA Online Quoting for Homeowners Policies \(ON\)](#) – Brokers in Ontario who write business with Western Assurance (WA) can now access the Online Quoting feature directly from TBW and IntelliQuote for Homeowners policies, effective March 21, 2018 for new business and May 21, 2018 for renewals. Additional fields and selections have been added to IntelliQuote to support WA Online Quoting.

## 1. WA Online Quoting for Homeowners Policies (ON)

Brokers in Ontario who write business with Western Assurance (WA) can now access the Online Quoting feature directly from TBW and IntelliQuote for Homeowners policies, effective March 21, 2018 for new business and May 21, 2018 for renewals.

What this will mean for you, the broker, is that WA 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 Royal and Sun Alliance's (RSA's) system through a web call.

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 a WA Homeowners IQ with a Calculation Date on or after March 21 for new business / on or after May 21

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 WA 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 available for new policies, as well as renewal quoting and endorsement quoting.
- The Online Quoting feature is currently applicable only for Homeowners policies (including *Broad* and *Comprehensive Plus* types for WA).
- 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 WA Online Quoting

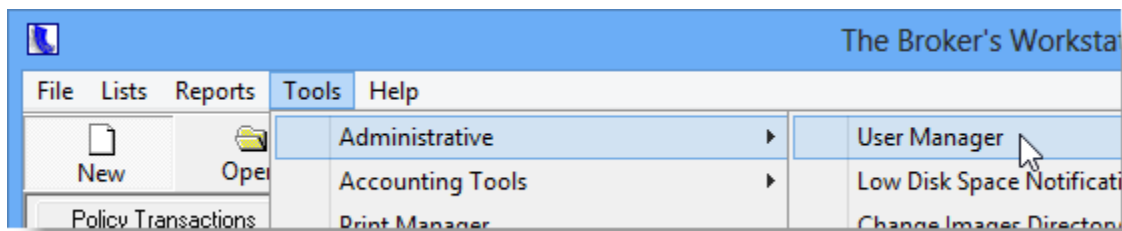
The following one-time setup for the WA Online Quoting feature must be completed in TBW before the functionality can be used.

*\*\*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 WA WebConnect functions.\*\**

To set up the WA Online Quoting feature,

1. Ensure you have the required RSA/WA User ID and Password.
  - If you require a User ID and Password, please contact your RSA/WA 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)



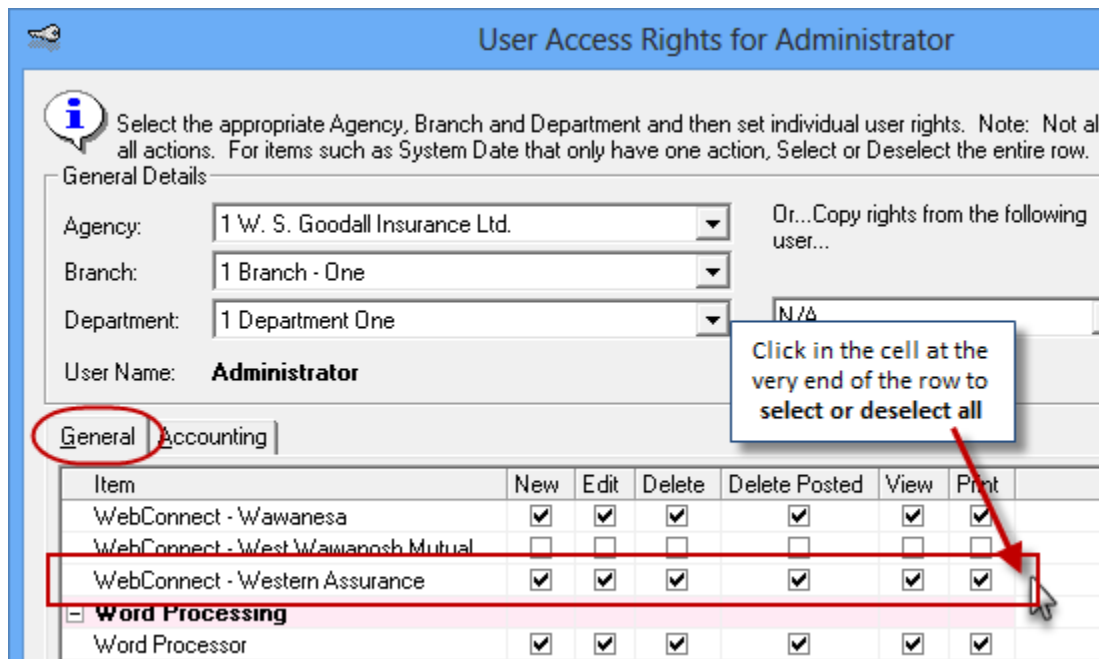
- b. In the **User Level Access Rights** dialog, select the **User Name** and then click the **Rights** button (see Figure 1.2).

(Figure 1.2)



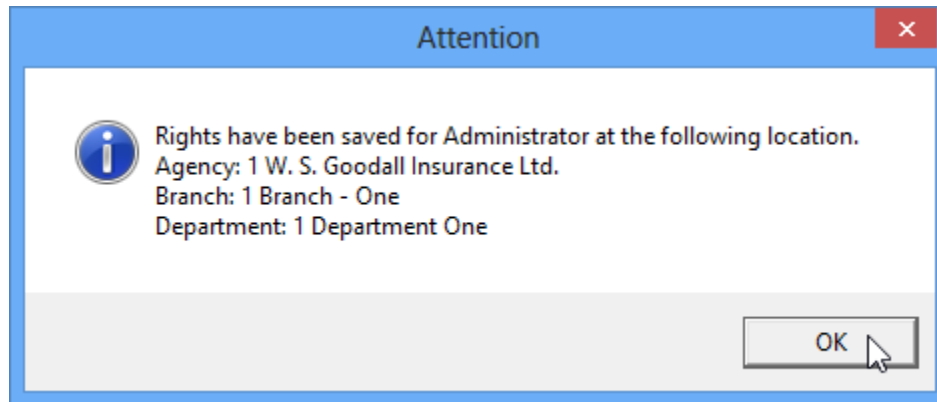
- c. On the **General** tab in the **User Access Rights** dialog, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Western Assurance** (see Figure 1.3).

(Figure 1.3)



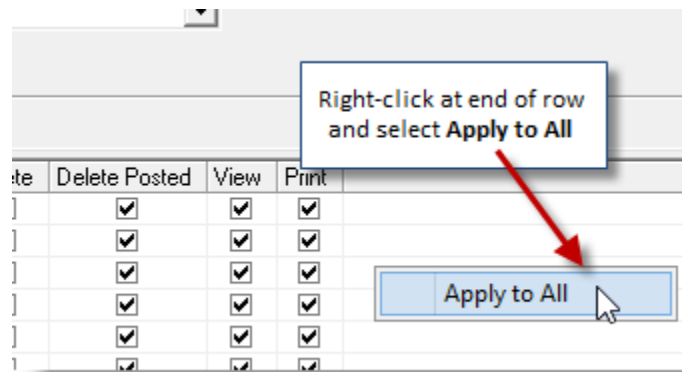
- d. Click **OK** in the **User Access Rights** window to save these rights for this user for this ABD, and then click **OK** in the **Attention** window (see Figure 1.4).

(Figure 1.4)



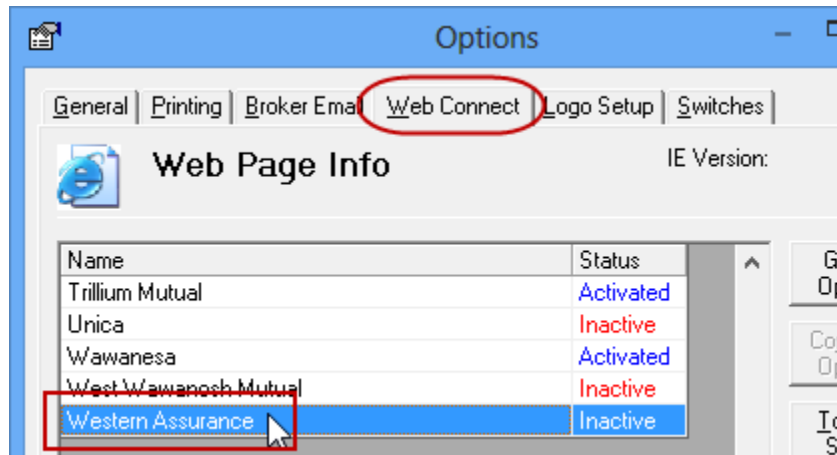
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – Western Assurance* to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.5).

(Figure 1.5)



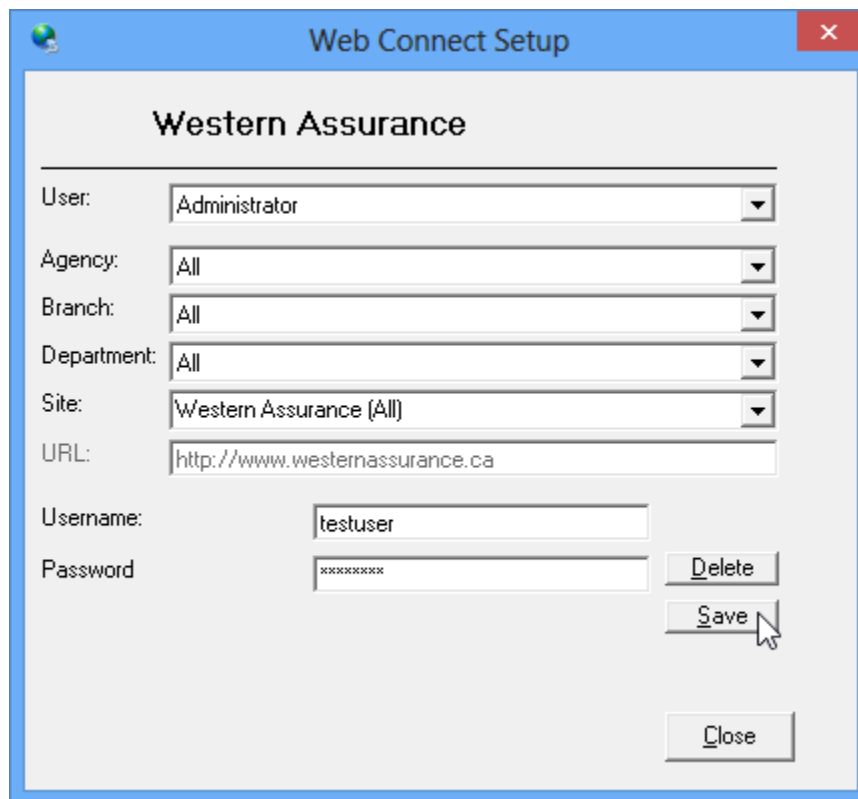
- f. Click **Close** in the **User Access Rights** window.
  - g. Repeat Steps b – f for each additional TBW user requiring these rights.
  - h. Click **OK** in the **User Level Access Rights** window.
3. Next, for any user *not* currently set up for Western Assurance in WebConnect, follow these steps: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

(Figure 1.6)



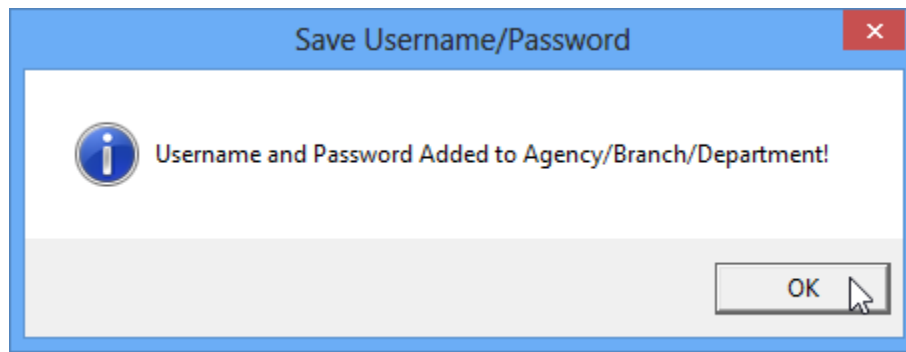
- c. In the **WebConnect Setup** window,
  - i. Select the applicable **User**.
  - ii. Select **All** or the applicable **ABD** (Agency/Branch/Department).
  - iii. In the **Site** menu, ensure **Western Assurance (All)** is selected.
  - iv. Enter the appropriate **Username** and **Password**.
  - 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.

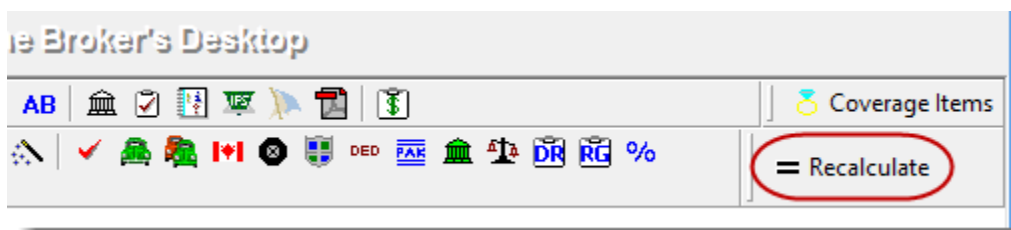
- o *Be sure to update your WebConnect Setup details whenever you reset your password.*

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

4. Close TBW and then reopen the program.

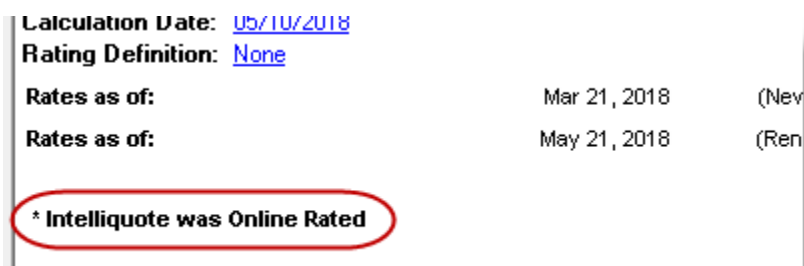
Now that the one-time setup has been completed, RSA's web service will be called when the TBW user clicks the **Recalculate** button on the IntelliQuote toolbar when creating a new or modifying an existing WA Homeowners IntelliQuote (see Figure 1.9).

(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)

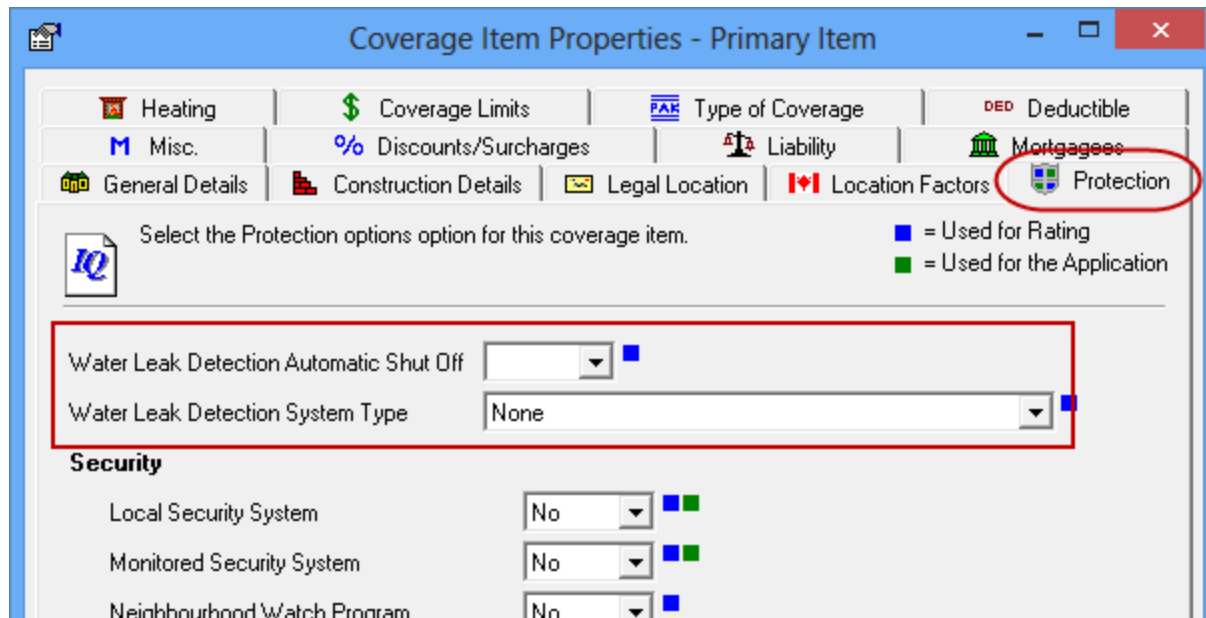


## Additions and Changes in IQ

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

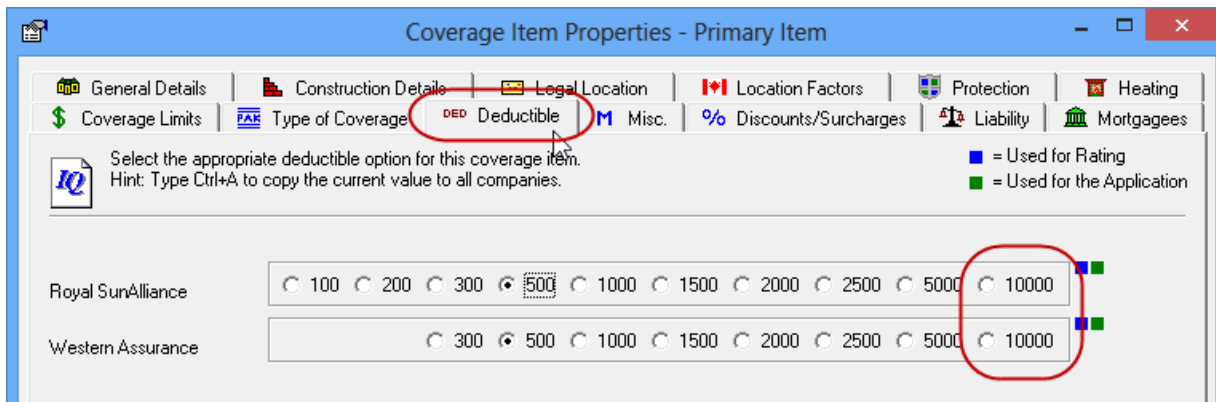
- On the **Protection** tab in Coverage Items Properties, the **Water Leak Detection Automatic Shut Off** and **Water Leak Detection System Type** fields are available (see Figure 1.11).
  - Select *Automatic*, *Manual*, *Monitored*, or *Unknown* in the drop-down menu for the Water Leak Detection System Type, as applicable.

(Figure 1.11)



- For the primary item **Deductible**, a value of \$10,000 is now available for selection (see Figure 1.12).

(Figure 1.12)



- A new rating factor to indicate jewellery as a scheduled item has been introduced.

- 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	
<b>Miscellaneous Discounts/Surcharges</b>		
- Claims Free Dis. Applied		Incl.
- Loyalty Dis. Applied		Incl.
- New Home Dis. Applied		Incl.
- Miscellaneous Sur. Applied		Incl.

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



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