

14 January 2019

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)**:

Contents

1. [RSA Online Quoting for Non-Homeowner Policies \(ON\)](#) – Brokers in Ontario who write business with Royal and Sun Alliance (RSA) can now access the Online Quoting feature directly from TBW and IntelliQuote for condo, tenant, and other non-homeowner policies (including secondary non-homeowner dwellings), effective January 14, 2019 for new business and March 13, 2019 for renewals.

1. RSA Online Quoting for Non-Homeowner Policies (ON)

Brokers in Ontario who write business with Royal and Sun Alliance (RSA) can now access the Online Quoting feature directly from TBW and IntelliQuote for condo, tenant, and other non-homeowner policies (including secondary non-homeowner dwellings), effective January 14, 2019 for new business and March 13, 2019 for renewals.

What this will mean for you, the broker, is that RSA rates for non-homeowner 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 ([see below](#)) has been completed, RSA's web service will automatically be called whenever you click the **Recalculate** toolbar button (see Figure 1.1) in an RSA non-homeowner IQ with a Calculation Date on or after January 14 for new business / on or after March 13 for renewals.

(Figure 1.1)



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.
- Online rating will be for condo, tenant, rented dwellings (including rented condo), seasonal dwellings, watercraft, holiday travel, and mobile home.
 - As released previously, the Online Quoting feature is also applicable for RSA homeowner policies (including *Broad*, *Comprehensive*, and *Platinum Plus* types for RSA).
- The Online Quoting feature is available for new policies, as well as renewal quoting.
- The RSA 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.
- 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 non-homeowner IQ is opened, it will continue to use TBW's local rating engine for quoting unless the Calculation Date is changed.
- In the IQ Summary Report, "**Incl.**" (rather than the percentage) will display for applicable **Discounts/Surcharges** (see Figure 1.2).

(Figure 1.2)

Unwilling:	\$500,000	
Personal Property:	\$350,000	
Outbuildings:	\$50,000	
Miscellaneous Discounts/Surcharges		
- Claims Free Dis. Applied		Incl.
- New Home Dis. Applied		Incl.
- Mature Citizen Dis. Applied		Incl.

Setup for RSA Online Quoting

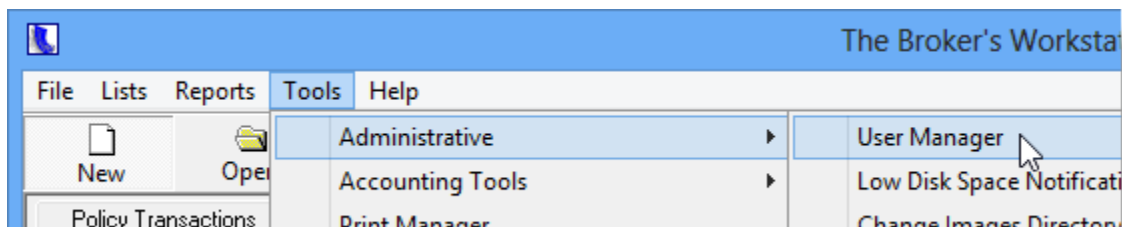
The following one-time setup for the RSA Online Quoting feature must be completed in TBW before the functionality can be used.

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,

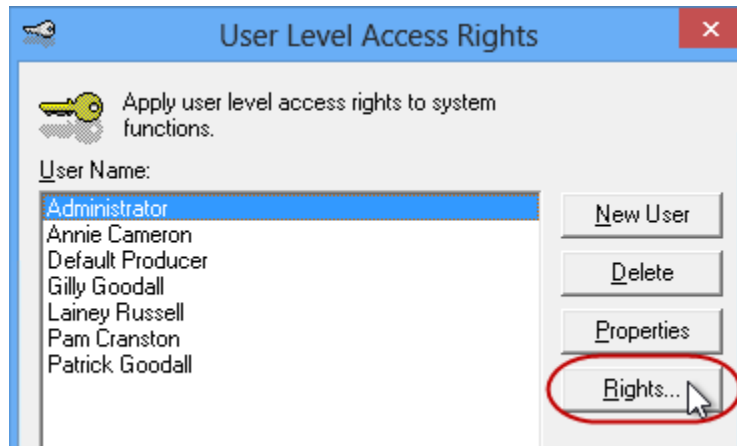
1. Ensure you have the required RSA User ID and Password.
 - If you require a User ID and Password, please contact your RSA Personal Lines representative for assistance.
2. Ensure appropriate **User Rights** for this feature are set up for applicable TBW users as follows:
 - a. In the TBW window, click **Tools, Administrative, User Manager** (see Figure 1.3).

(Figure 1.3)



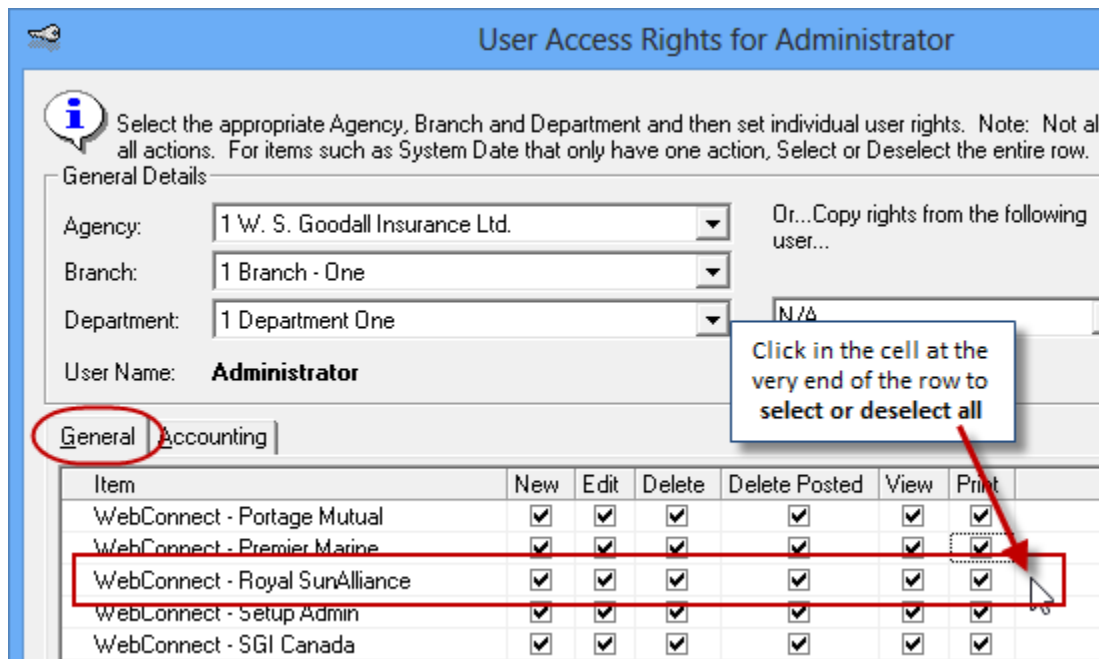
- b. In the **User Level Access Rights** dialog, select the **User Name** and then click the **Rights** button (see Figure 1.4).

(Figure 1.4)



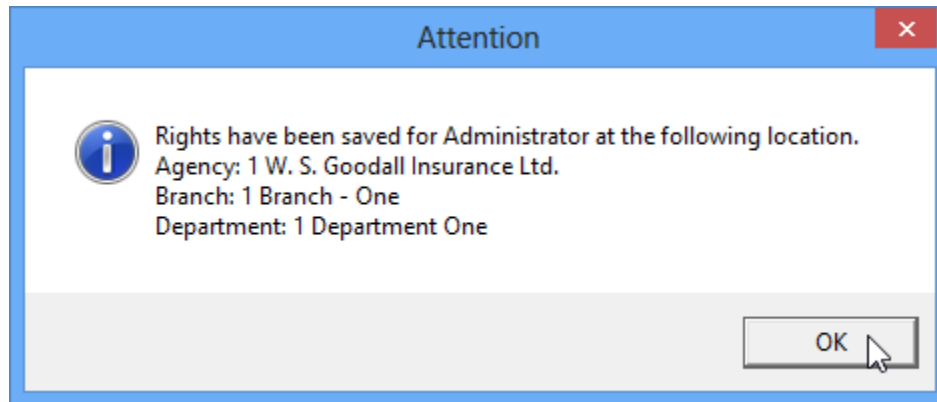
- c. On the **General** tab in the **User Access Rights** dialog, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Royal SunAlliance** (see Figure 1.5).

(Figure 1.5)



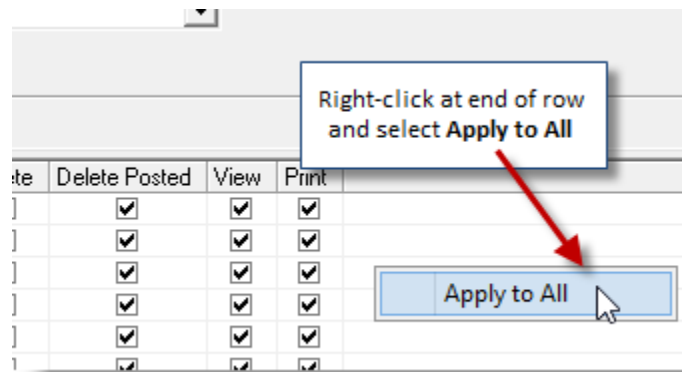
- d. Click **OK** in the **User Access Rights** window to save these rights for this user for this ABD, and then click **OK** in the **Attention** window (see Figure 1.6).

(Figure 1.6)



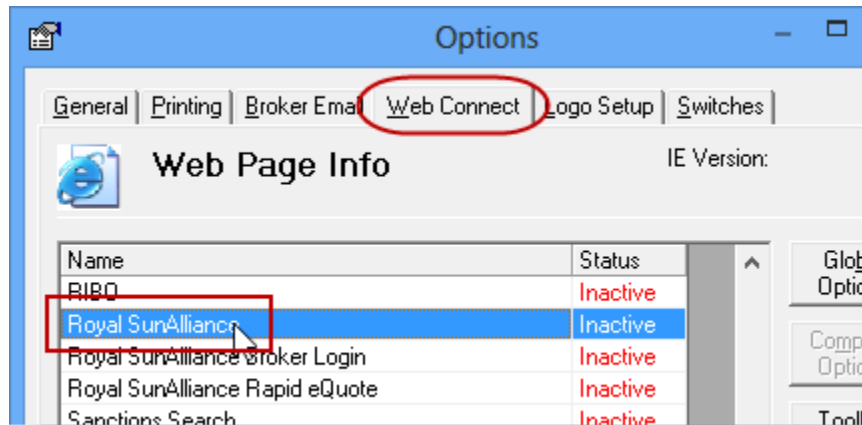
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – Royal SunAlliance* to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.7).

(Figure 1.7)



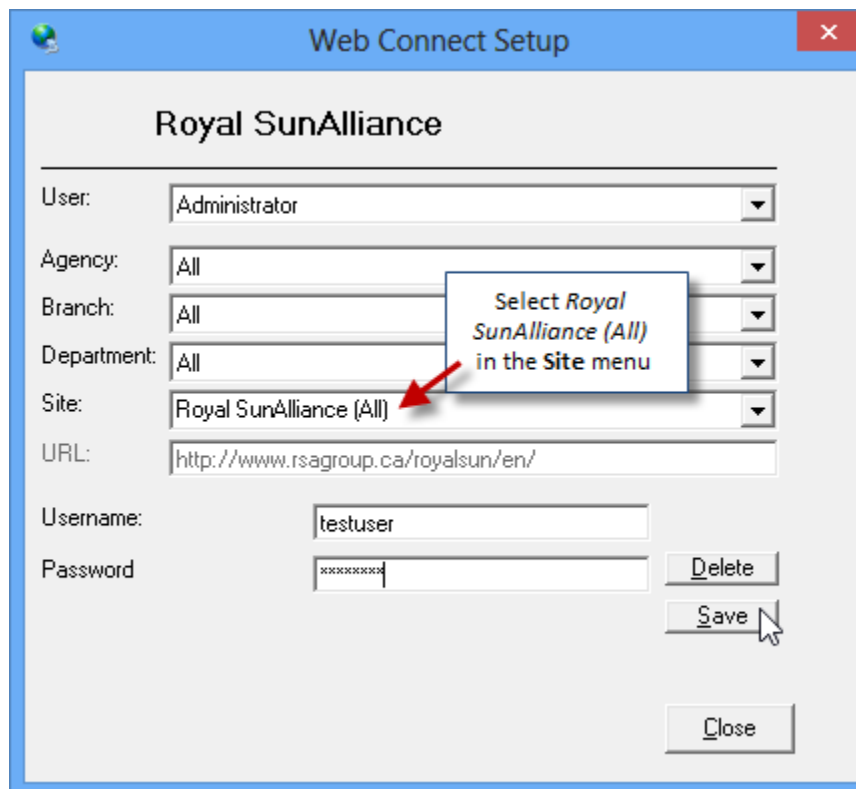
- f. Click **Close** in the **User Access Rights** window.
 - g. Repeat Steps b – f for each additional TBW user requiring these rights.
 - h. Click **OK** in the **User Level Access Rights** window.
3. Next, for any user *not* currently set up for RSA in WebConnect, follow these steps:
 - a. Click **Tools, Options** in the TBW window.
 - b. On the **WebConnect** tab in the **Options** dialog, find and double-click **Royal SunAlliance** (see Figure 1.8).

(Figure 1.8)



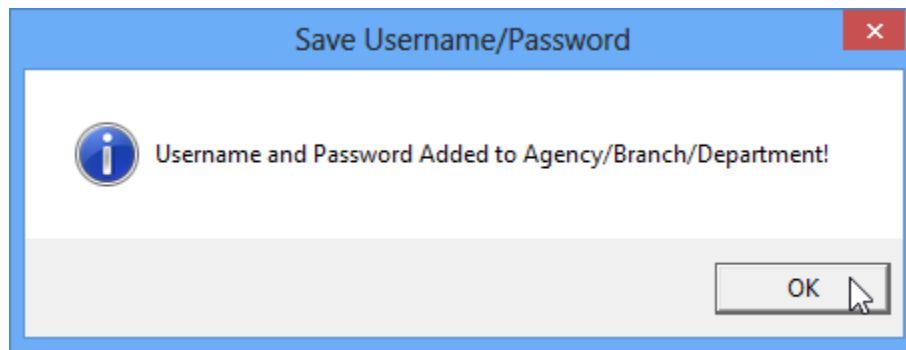
- c. In the **WebConnect Setup** window,
 - i. Select the applicable **User**.
 - ii. Select **All** or the applicable **ABD** (Agency/Branch/Department).
 - iii. In the **Site** menu, ensure **Royal SunAlliance (All)** is selected.
 - iv. Enter the appropriate **Username** and **Password**.
 - v. Click **Save** (see Figure 1.9).

(Figure 1.9)



vi. Click **OK** in the **Save Username/Password** box (see Figure 1.10).

(Figure 1.10)



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 WebConnect Setup details whenever you reset your password.*

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

4. Close TBW and then reopen the program.

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,

Custom Software Solutions Inc.



Microsoft Partner

Gold Independent Software Vendor (ISV)

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