

15 April 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)**:

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1. [Western Assurance Online Quoting for Auto Policies \(ON\)](#) – Brokers who write business in Ontario with Western Assurance (WA) can now access the Online Quoting feature directly from TBW and IntelliQuote for personal lines auto policies, effective May 15, 2019 for new business and June 15, 2019 for renewals. Also, two new endorsements are available for WA Auto IQs.

## 1. Western Assurance Online Quoting for Auto Policies (ON)

Brokers who write business in Ontario with Western Assurance (WA) can now access the Online Quoting feature directly from TBW and IntelliQuote for personal lines auto policies, effective May 15, 2019 for new business and June 15, 2019 for renewals.

What this will mean for you, the broker, is that WA rates for personal lines auto policies will always be up-to-date and available to you Realtime, because the rates will come directly and immediately from Royal and Sun Alliance's (RSA's) system through a web call. This streamlined quoting process, with improved rating accuracy and rate updates in Realtime, will enhance the customer experience, and enable you to do business more efficiently and responsively.

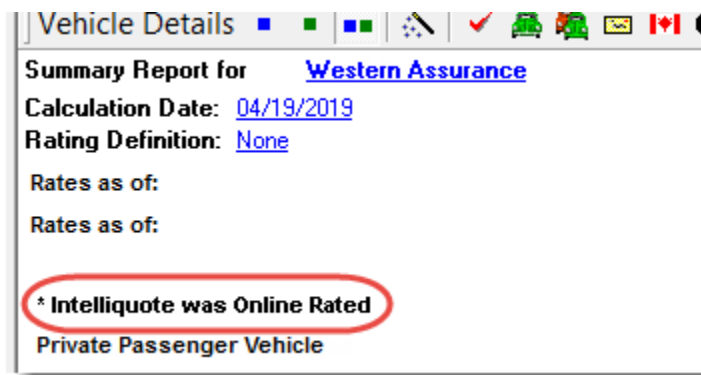
Once the simple, one-time setup ([see below](#)) has been completed, RSA's web service will automatically be called whenever you click the **Recalculate** toolbar button (see Figure 1.1) in a WA personal lines auto IQ with a Calculation Date on or after May 15 for new business / on or after June 15 for renewals.

(Figure 1.1)



The results of the web service call will be displayed immediately on the Summary Report tab in the IntelliQuote. Note that use of online rating will also be indicated in the IQ (see Figure 1.2).

(Figure 1.2)



Any alerts that have been returned from the web service will instantly be displayed on the Alerts tab in the IntelliQuote, 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.
- Online rating will be for private passenger vehicles, ATVs (all-terrain vehicles), trailers, motorhomes, and snowmobiles.
- The Online Quoting feature is available for new business, renewal, and mid-term endorsement quoting.
- Please note, due to rate capping on renewal policies, when performing an online quote and rating with Western Assurance, the online quote rate may not match the renewal rate.
- When a pre-existing personal lines auto IQ is opened, it will continue to use TBW's local rating engine for quoting unless the Calculation Date is changed.

## New Endorsements for WA Auto IQ

Please note the following new endorsements when you are creating a new or modifying an existing WA Auto IQ:

- The new “PCF 6 TNC – Permission to Drive for a Transportation Network Company with Insurance Coverage” endorsement has been added.
- The new “PCF 5 CS – Permission to Rent or Lease the Vehicle for Carsharing” endorsement has been added.

## Setup for Western Assurance Online Quoting

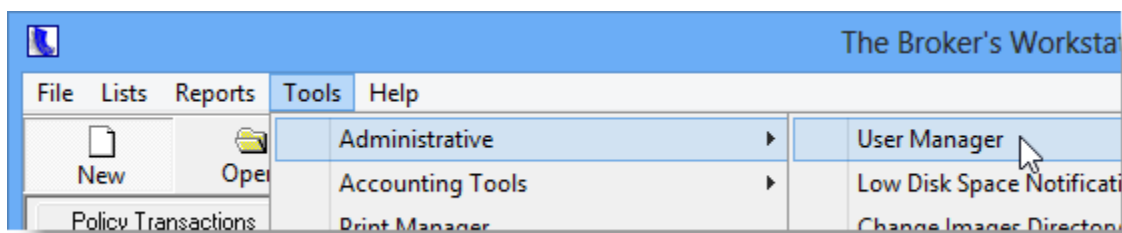
The following one-time setup for the WA Online Quoting feature must be completed in TBW before the functionality can be used.

*\*\*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,

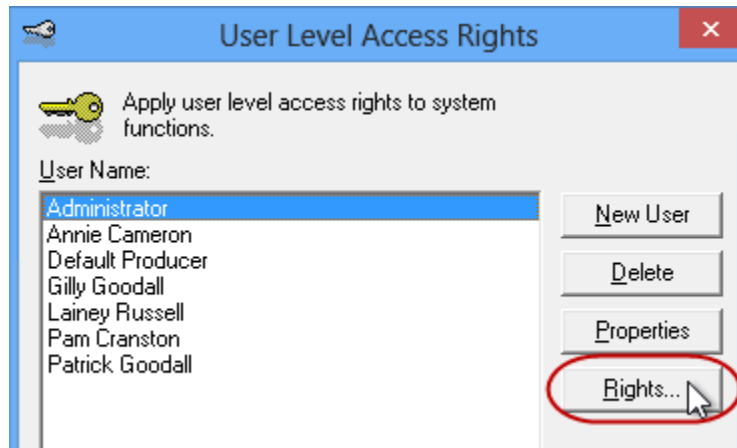
1. Ensure you have the required RSA/WA User ID and Password.
  - This User ID and Password are required for WebConnect setup for “Western Assurance (All)” in step 3c below.
  - If you require a User ID and Password, please contact your RSA/WA Personal Lines representative for assistance.
2. Ensure appropriate **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 1.3).

(Figure 1.3)



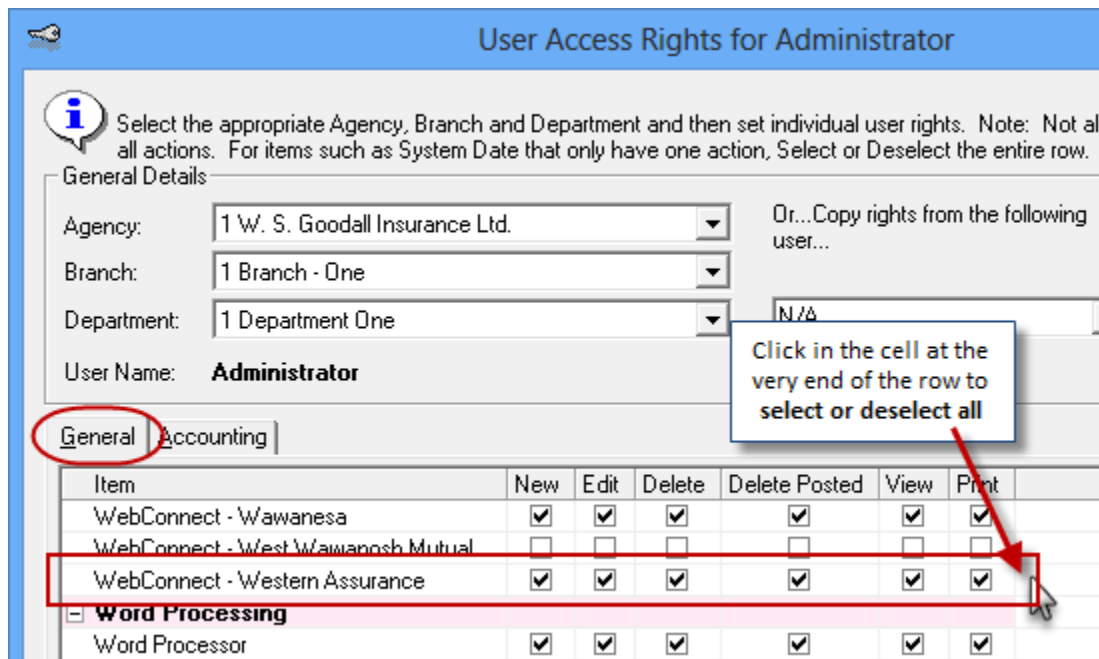
- b. In the **User Level Access Rights** dialog, select the **User Name** and then click the **Rights** button (see Figure 1.4).

(Figure 1.4)



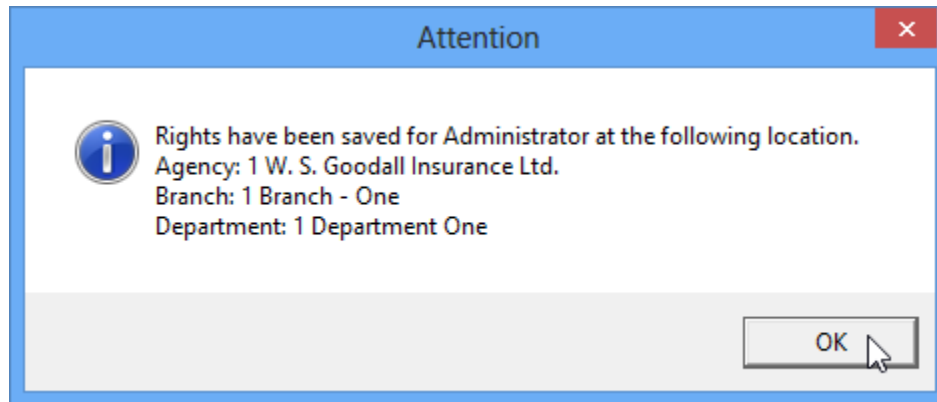
- c. On the **General** tab in the **User Access Rights** window, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Western Assurance** (see Figure 1.5).

(Figure 1.5)



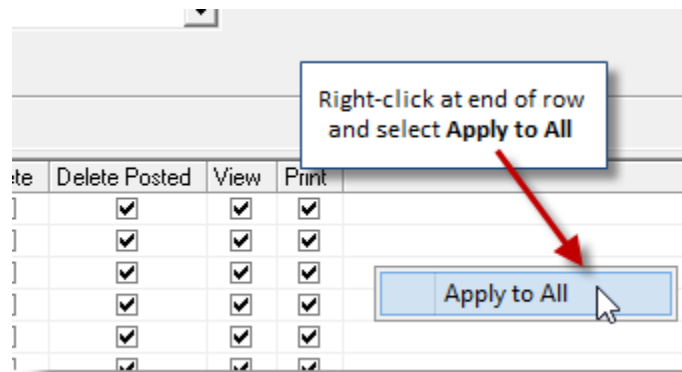
- d. Click **OK** in the **User Access Rights** window to save these rights for this user for this ABD, and then click **OK** in the **Attention** window (see Figure 1.6).

(Figure 1.6)



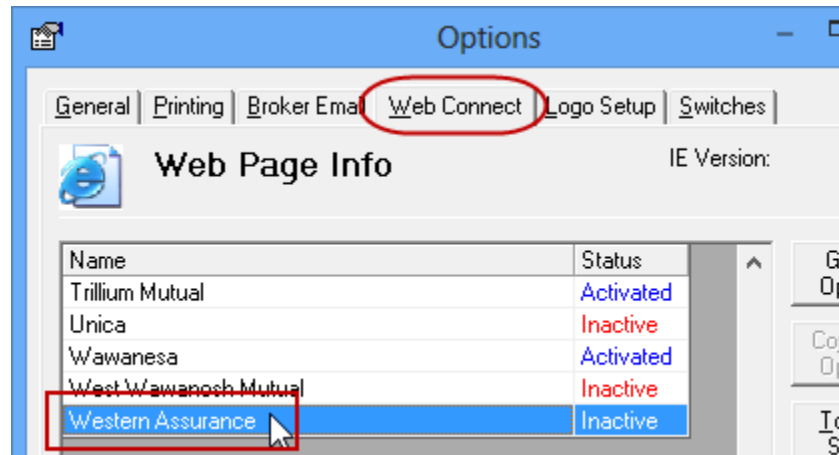
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – Western Assurance* to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.7).

(Figure 1.7)



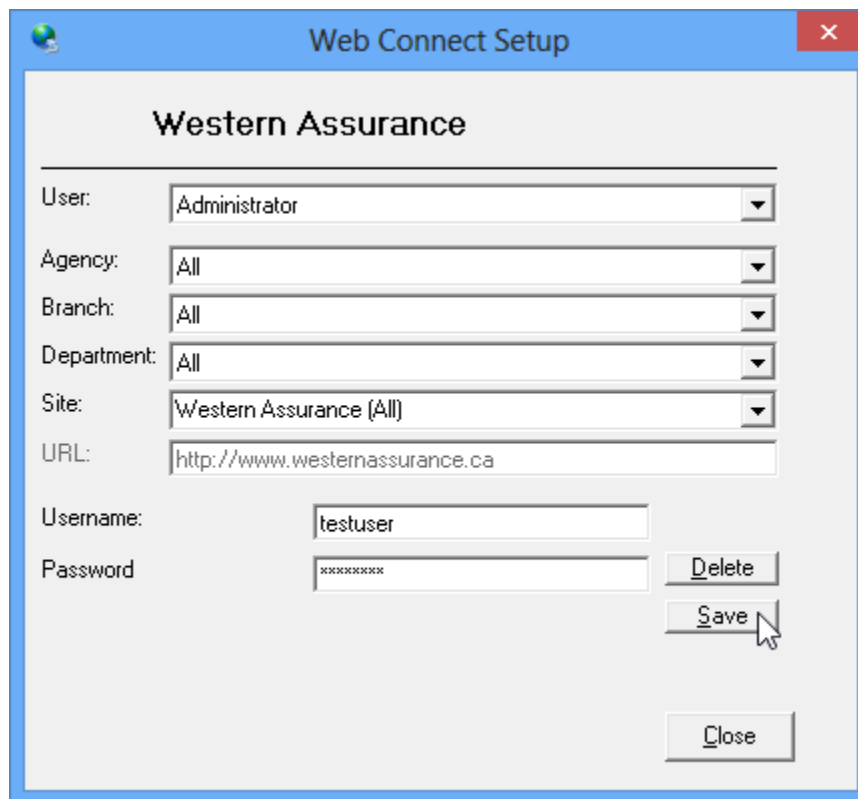
- f. Click **Close** in the **User Access Rights** window.
  - g. Repeat Steps b – f for each additional TBW user requiring these rights.
  - h. Click **OK** in the **User Level Access Rights** window.
3. Next, for any user not currently set up for Western Assurance in WebConnect, follow these steps:
    - 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 1.8).

(Figure 1.8)



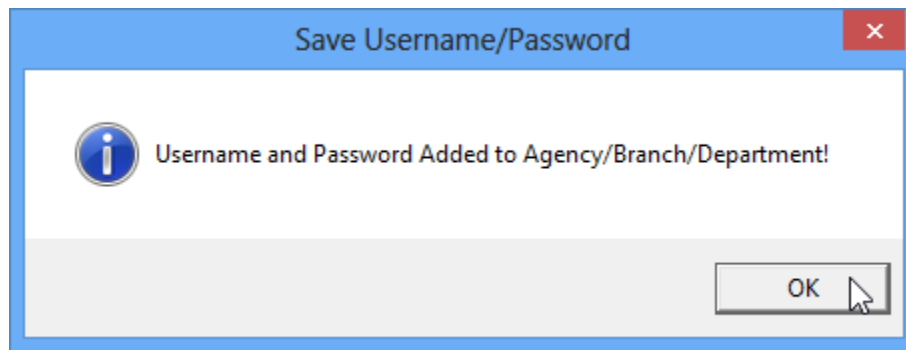
- c. In the **WebConnect Setup** window,
  - i. Select the applicable **User**.
  - ii. Select **All** or the applicable **ABD** (Agency/Branch/Department).
  - iii. In the **Site** menu, ensure **Western Assurance (All)** is selected.
  - iv. Enter the appropriate **Username** and **Password**.
  - 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](mailto:clientservices@cssionline.com) (email) or 1-888-291-3588 (toll-free telephone) with any questions you have about the setup for the Western Assurance 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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Gold Independent Software Vendor (ISV)

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