



15 June 2015

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)**:

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1. [TBW Now Offers Chieftain Online Quoting](#) – Brokers in Ontario who write business with Chieftain can now access the new Online Quoting feature directly from TBW and IntelliQuote for auto policies.

1. TBW Now Offers Chieftain Online Quoting

We are pleased to announce that TBW now offers Online Quoting with Chieftain!

As of June 15, 2015, brokers in Ontario who write business with Chieftain can now access the new Online Quoting feature directly from TBW and IntelliQuote for auto policies, effective July 15, 2015 for new business.

What this will mean for you, the broker, is that Chieftain auto rates will always be up-to-date and available to you real-time, because the rates will come directly and immediately from Chieftain's system through a web call.

Once you have completed the one-time, simple setup for this feature, Chieftain's web service will automatically be called whenever you click the Recalculate button on the IQ toolbar when you are creating a new or modifying an existing Chieftain Personal Lines Auto IQ with a Calculation Date on or after July 15.

The results of the web service call will be immediately displayed 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're using the Online Quoting feature:

- **Remember, Online Quoting can be used for current (today's date) rating and forward rating, but it cannot be used for backward rating.** As such, for Online Quoting, please ensure your IQ is set to the current or a future date, rather than a past date.
 - This is applicable for renewal, endorsement, and multi-company rating, as well.
 - You can also contact the Underwriter for an actual rate for renewal, endorsement, and multi-company rating, if you wish.
- **Renewal quoting and endorsement quoting can be done on Dominion's website, as well.** Please contact your Chieftain Personal Lines Representative for assistance in using this feature.
- **When a pre-existing IQ is opened, it will continue to use TBW's local rating engine for quoting unless the Calculation Date is changed.**
- **The Online Quoting feature currently doesn't support recreational vehicles or commercial vehicles,** so please contact Chieftain directly for assistance when you are rating a recreational or commercial vehicle.

Setup for Chieftain Online Quoting

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

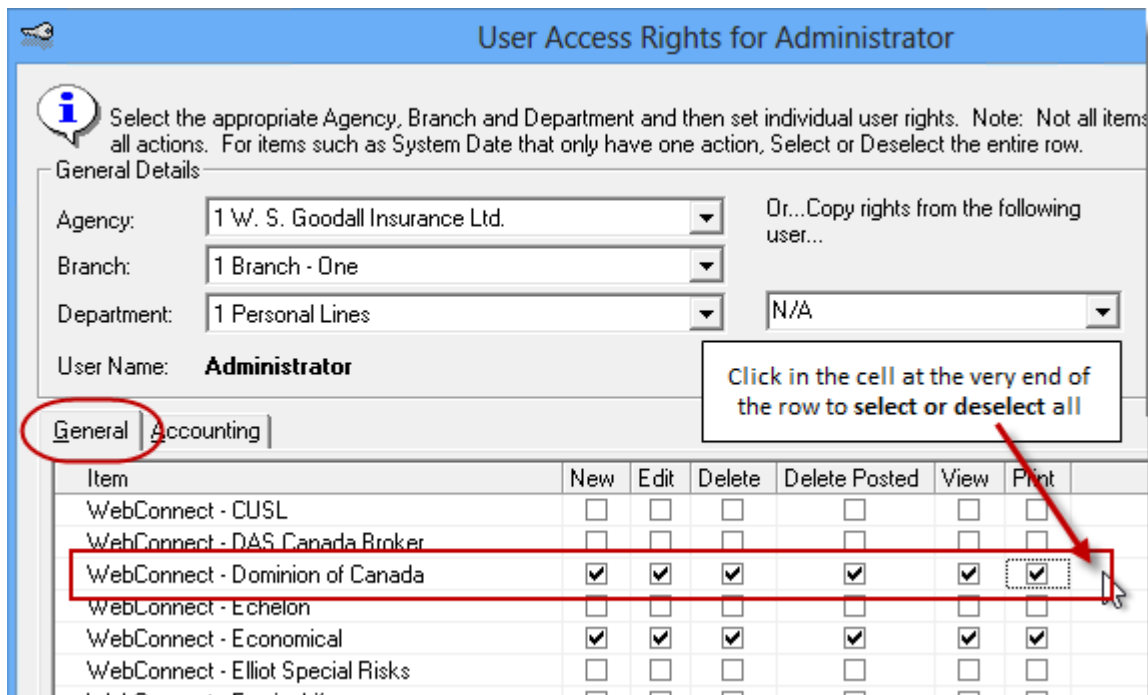
Please note that most users will already have completed the following setup steps (User Rights and WebConnect). As such, these steps will only need to be completed for new users or if your office has never used any Dominion WebConnect functions.

To set up the Online Quoting feature,

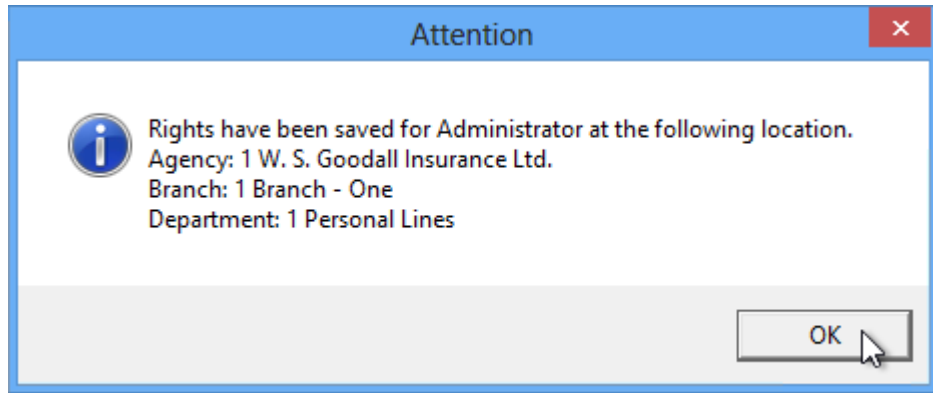
1. In **TBW**, enable **User Rights** for each applicable TBW user as follows:
 - a. Click **Tools, Administrative, User Manager**.
 - b. In the **User Level Access Rights** dialog, click the **User Name** and then click the **Rights** button.



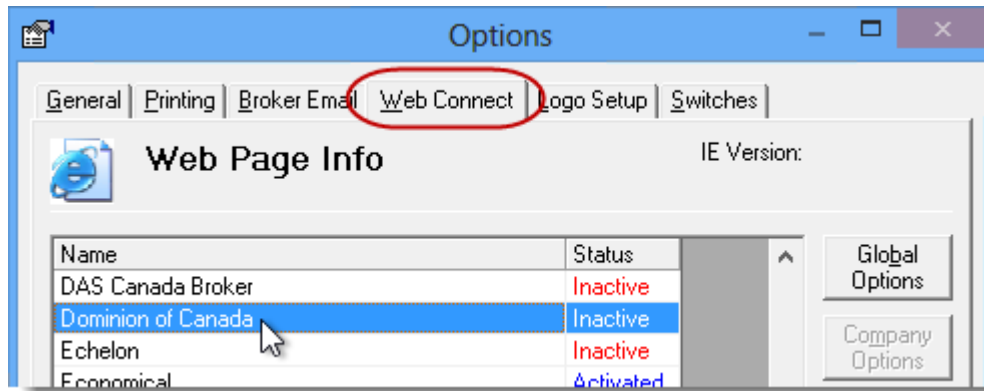
- c. On the **General** tab in the **User Access Rights** dialog, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Dominion of Canada** in the **WebConnect** category.
- To select or deselect all items in the row at once, click in the cell at the very end of the row.



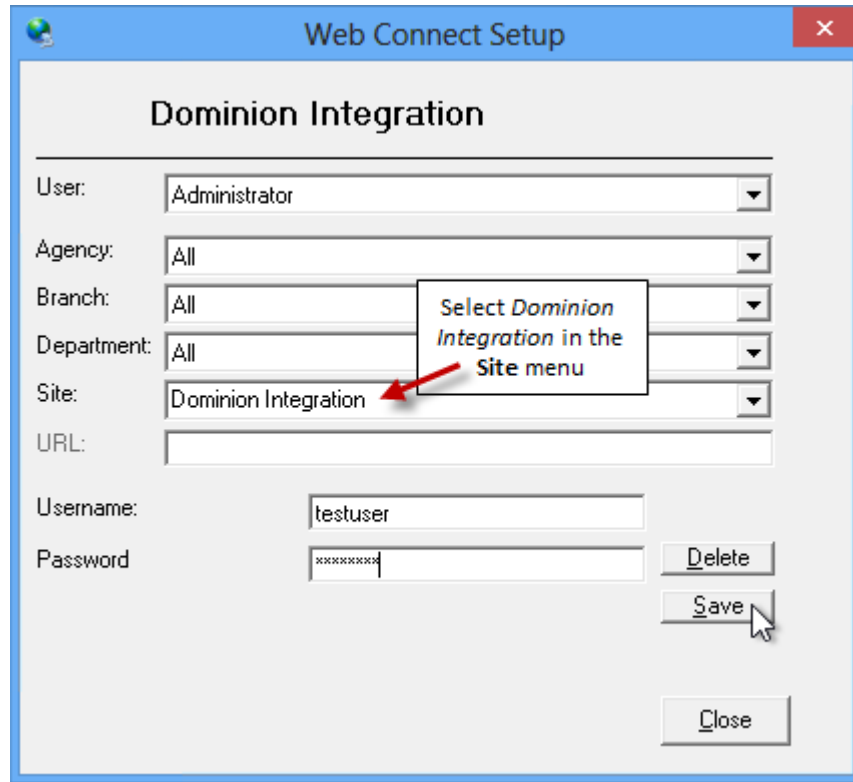
- d. Click **OK** in the **User Access Rights** window to save these rights for this user for this ABD, and then click **OK** in the **Attention** window.



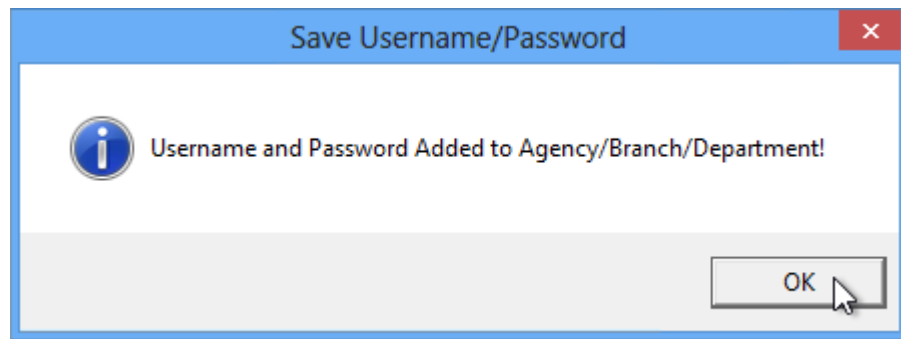
- e. If required, repeat Steps c – d for additional ABDs for this user.
 - f. Click **Close** in the **User Access Rights** window.
 - g. Repeat Steps b – f for each additional TBW user requiring these rights.
 - h. Click **OK** in the **User Level Access Rights** window.
2. *This next step is not required for those who are already using the Dominion New Business Upload functionality, because WebConnect has already been set up properly.* For any user not currently set up for Dominion Integration, set up **WebConnect** as follows:
- a. Click **Tools, Options** in the TBW window.
 - b. On the **WebConnect** tab in the **Options** dialog, find and double-click **Dominion of Canada**.



- c. In the **WebConnect Setup** window,
 - i. Select the applicable **User**.
 - ii. Select **All** or the applicable **Agency, Branch, and Department**.
 - iii. In the **Site** drop-down menu, select **Dominion Integration**.
 - iv. Enter the appropriate **Username** and **Password**.
 - v. Click **Save**.



vi. Click **OK** in the **Save Username/Password** box.



vii. Repeat these steps as required for additional ABDs and/or Users.

viii. Click **Close** in the WebConnect Setup dialog.

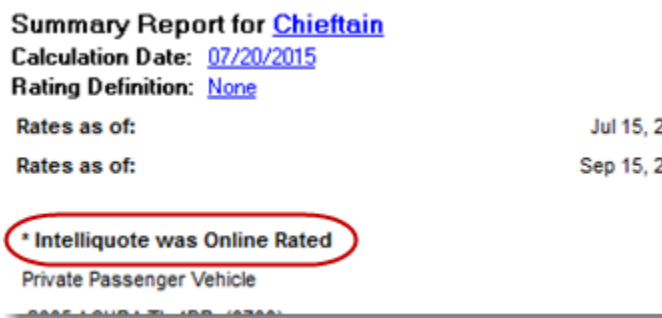
- *Be sure to update your WebConnect Setup details whenever you reset your Password.*

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

Now that the one-time setup is complete, Chieftain'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 Chieftain Personal Lines Auto IntelliQuote.



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.



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