

31 May 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 new features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

### *Contents*

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1. [Economical Online Quoting and Real-Time Upload \(NB and PE\)](#) – Available June 4, brokers in New Brunswick and Prince Edward Island who write business with Economical can access Online Quoting and Real-Time Upload directly from TBW and IntelliQuote for all policy types, effective July 4, 2018 for new business.

## 1. Economical Online Quoting and Real-Time Upload (NB and PE)

Available June 4, brokers in New Brunswick and Prince Edward Island who write business with Economical can access Online Quoting and Real-Time Upload directly from TBW and IntelliQuote for all policy types (including personal property, personal auto [including recreational vehicles], and individually rated commercial auto), effective July 4, 2018 for new business.

What this will mean for you, the broker, is that Economical rates for all lines of business will always be up-to-date and available to you real-time, because the rates will come directly and immediately from Economical's system through a web call. In addition, with real-time data exchange, you will receive a response to your real-time upload within seconds. If the new business application that has been uploaded is accepted, the new policy document will be sent back in near real-time.

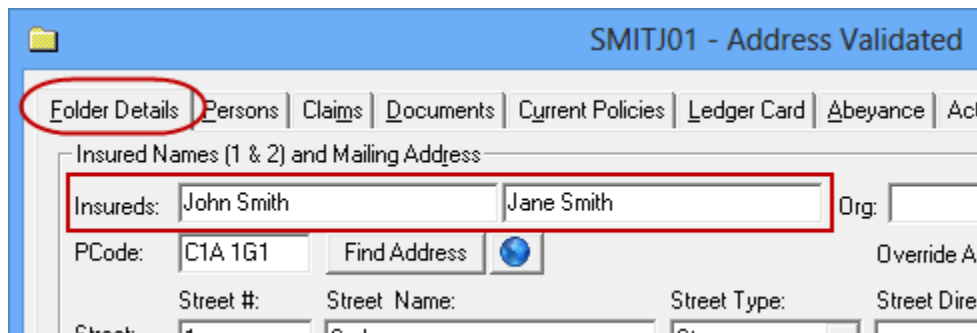
Once the simple, one-time setup for this feature has been completed, Economical's web service will automatically be called whenever you click the Recalculate button on the IQ toolbar for an Economical IQ with a Calculation Date on or after July 4 for new business.

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. In addition, once setup has been completed, the "Real-Time Upload" option will be available for new business applications.

Here are a few points to keep in mind when you are using Economical Online Quoting and Real-Time Upload:

- **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 Economical 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.
- In the Client folder...
  - Only one client name is to be entered in each **Insureds** field in the Client folder (see Figure 1.1).

(Figure 1.1)



- Also, **no characters** (such as an ampersand – '&') can be entered in either Insureds field. If a character exists in either the first or second Insureds field, you will be informed that the Named Insured does not match the Person. In this case, remove the character from the Client folder, check the folder in and out, and recalculate the IntelliQuote before proceeding.
- The name in the **Insureds** field and the name on the **Persons** tab must exactly match. In addition, the name in the Insureds field and on the Persons tab must be in proper case style, and cannot be entered in all capital letters.
- Batch Transact and Auto Transact are not affected by real-time download. Real-time downloads from Economical, which are automatically returned through a web connection, will not Auto Transact or be available in Batch Transact. For real-time downloads, the user can either transact the real-time download at the time, or reassign the download Abeyance to the appropriate person for transacting.

- **Do not delete an Economical policy that has been downloaded in real-time unless Economical advises you to do so.** Note that real-time downloads will not display in the processing screen, and so cannot be deleted and reprocessed.
- 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 to the current or a future date.
- As Perth and Waterloo are no longer supported after July 4, Perth/Waterloo IQs can be opened and viewed, but no longer quoted.

## Setup for Economical Online Quoting and Real-Time Upload

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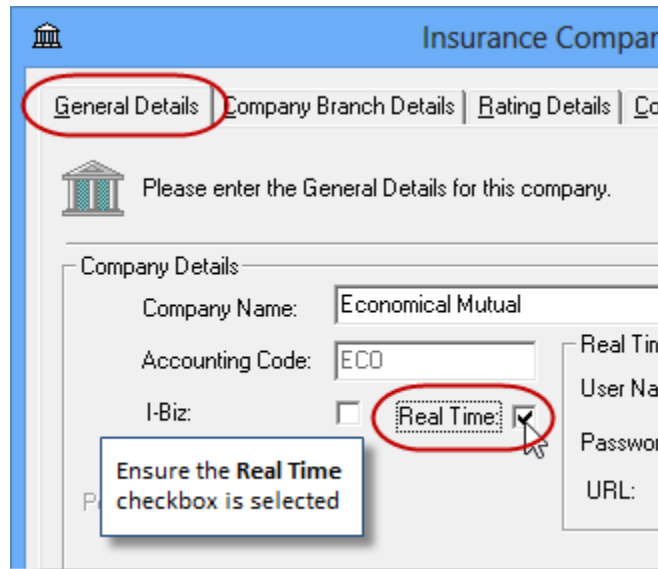
The following one-time setup for Economical Online Quoting and Real-Time Upload must be completed in TBW before the functionality can be used.

*\*\*Please note, users may already have completed some of the following setup steps (for 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 Economical WebConnect functions. Broker number setup is also required (but this, along with I-Biz Defaults and I-Biz Folder Defaults for each number, should already have been set up).\*\**

To set up Economical Online Quoting and Real-Time Upload,

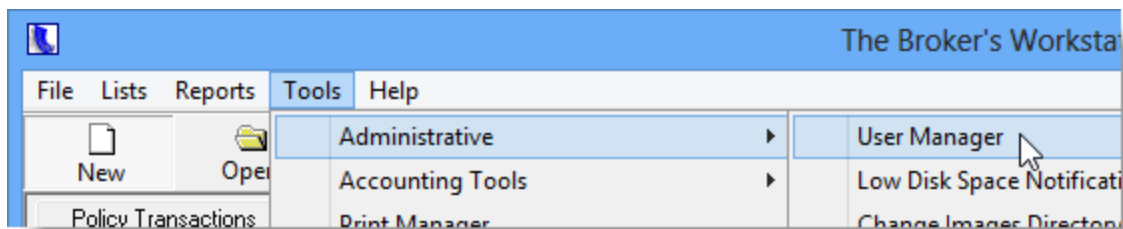
1. Ensure you have the required Economical User ID and Password.
  - If you require a User ID and Password, please contact Economical Broker System Support for assistance.
2. Check that the Real Time option is selected in TBW/TUW Lists as follows:
  - a. In the TBW window, click **Lists, Insurance Companies**.
  - b. In the **Lists** window, double-click **Economical**.
  - c. On the **General Details** tab in the Economical dialog, ensure the **Real Time** checkbox is selected (see Figure 1.2).

(Figure 1.2)



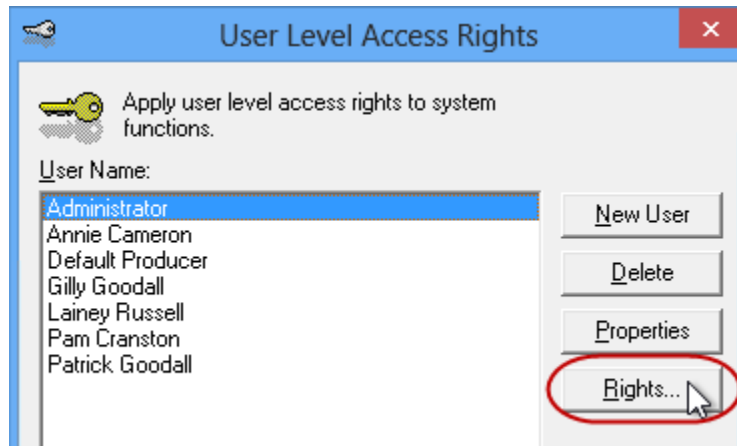
- d. Click **OK** in the Economical dialog.
- e. Click **OK** in the Lists dialog.
3. Ensure appropriate **User Rights** for this feature are set up for applicable TBW users as follows:
  - a. Click **Tools, Administrative, User Manager** (see Figure 1.3).

(Figure 1.3)



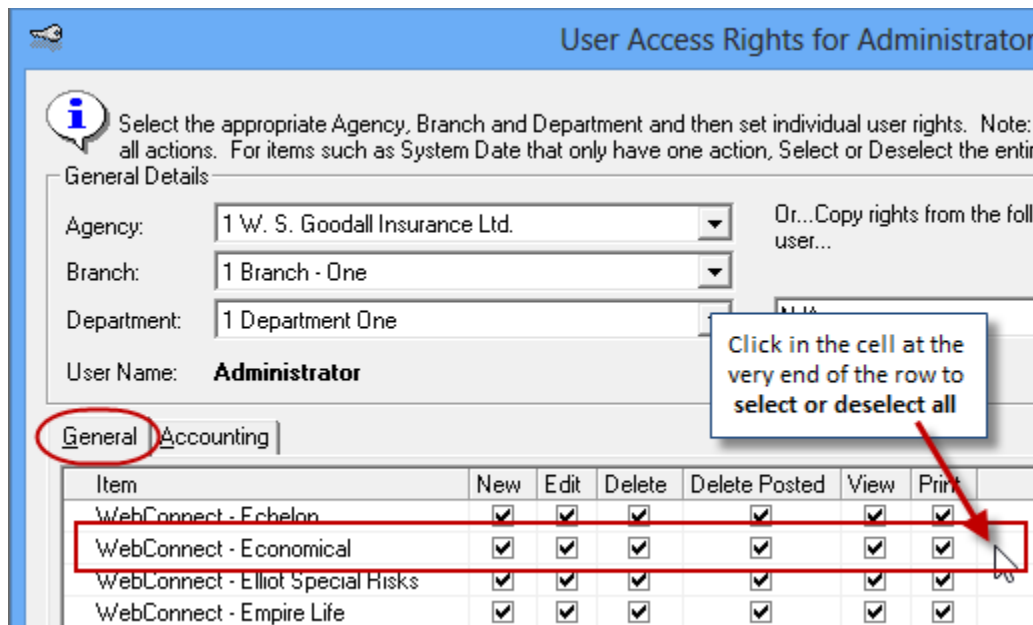
- b. In the **User Level Access Rights** dialog, select the **User Name** and then click the **Rights** button (see Figure 1.4).

(Figure 1.4)



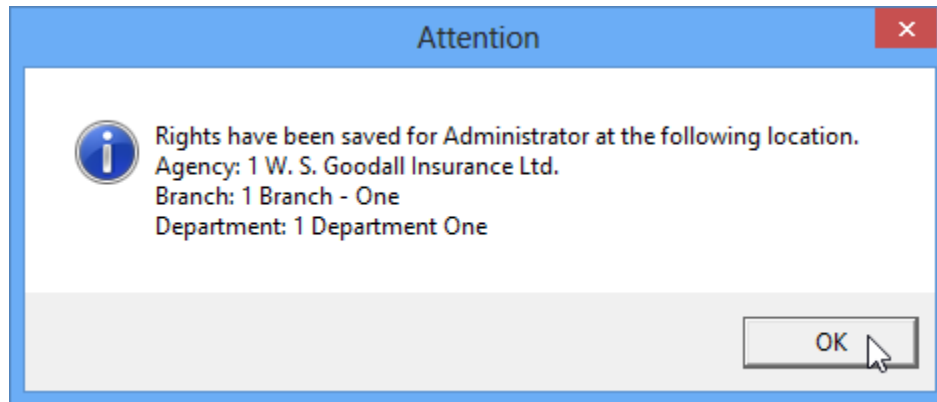
- c. On the **General** tab in the **User Access Rights** dialog, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Economical** (see Figure 1.5).

(Figure 1.5)



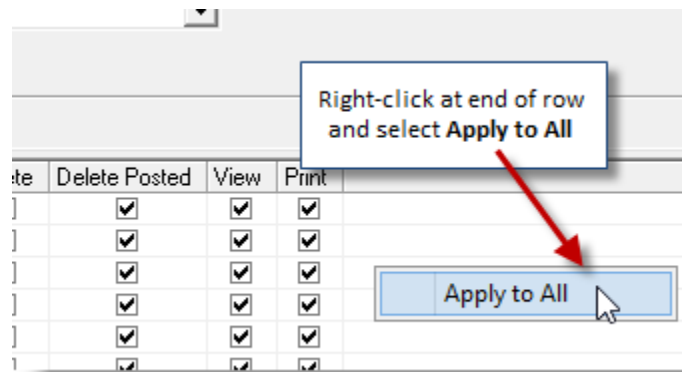
- d. Click **OK** in the **User Access Rights** window to save these rights for this user for this ABD, and then click **OK** in the **Attention** window (see Figure 1.6).

(Figure 1.6)



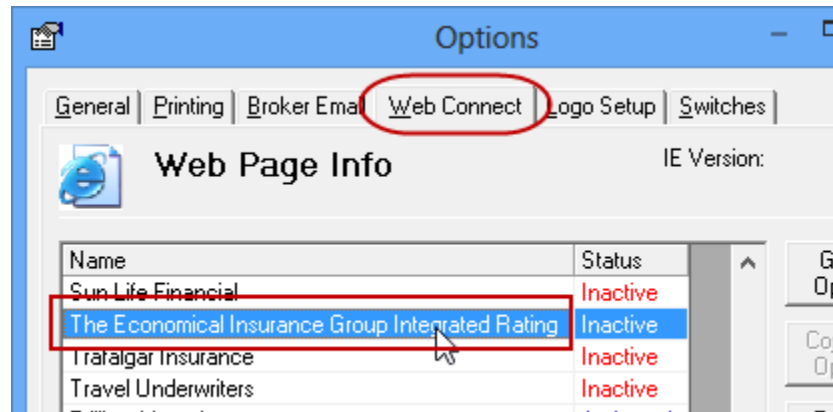
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – Economical* to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.7).

(Figure 1.7)



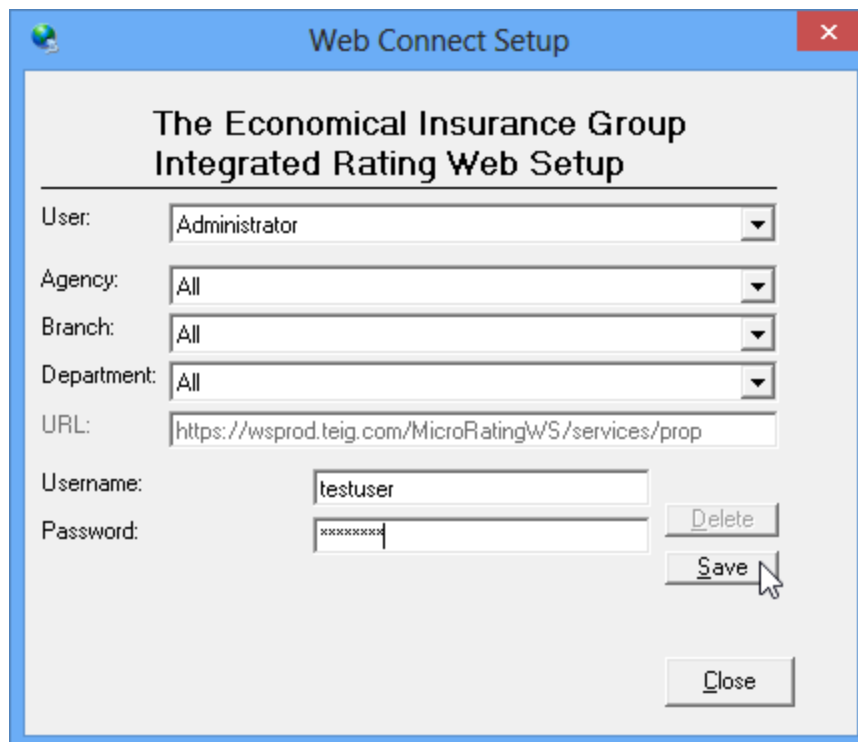
- f. Click **Close** in the **User Access Rights** window.
  - g. Repeat Steps b – f for each additional TBW user requiring these rights.
  - h. Click **OK** in the **User Level Access Rights** window.
4. Next, for any user *not* currently set up for Economical in WebConnect, follow these steps:
   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

(Figure 1.8)



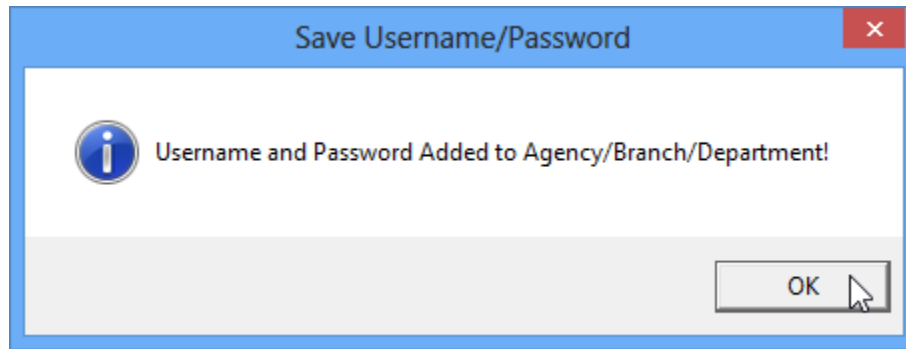
- c. In the **WebConnect Setup** window,
  - i. Select the applicable **User**.
  - ii. Select **All** or the applicable **ABD** (Agency, Branch, and Department).
  - iii. Enter the appropriate **Username** and **Password**.
  - iv. Click **Save** (see Figure 1.9).

(Figure 1.9)



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

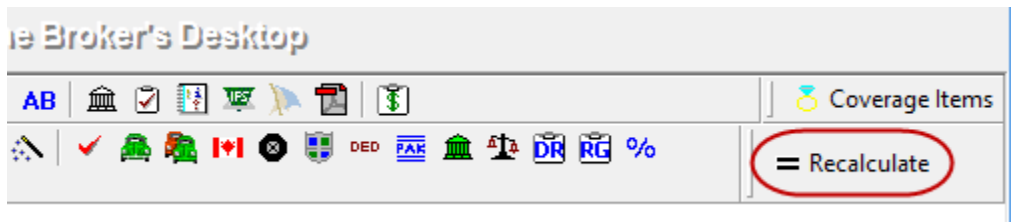
(Figure 1.10)



- vi. Repeat these steps as necessary for additional ABDs and/or Users.
  - vii. 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.
5. Close TBW and then reopen the program.

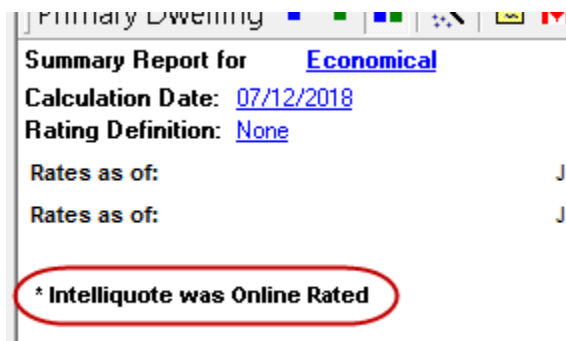
Proceed to create a new or modify an existing Economical IntelliQuote in the usual way, and Economical's web service will be called when you click the **Recalculate** button on the IQ toolbar (see Figure 1.11).

(Figure 1.11)



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 IQ (see Figure 1.12).

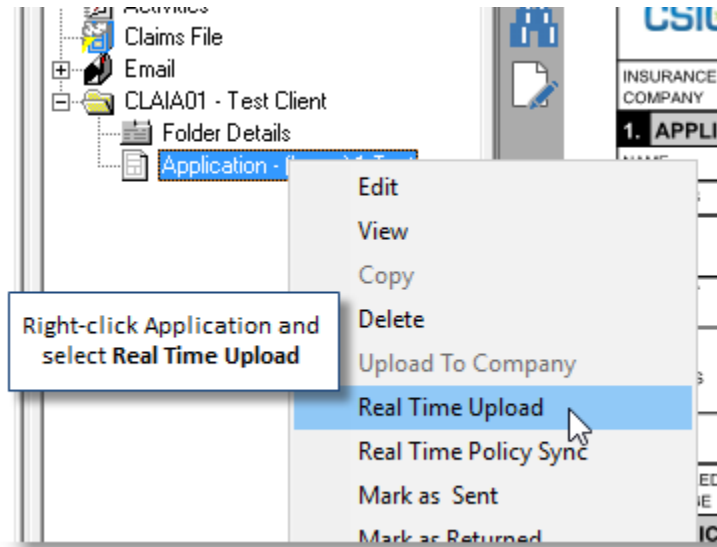
(Figure 1.12)





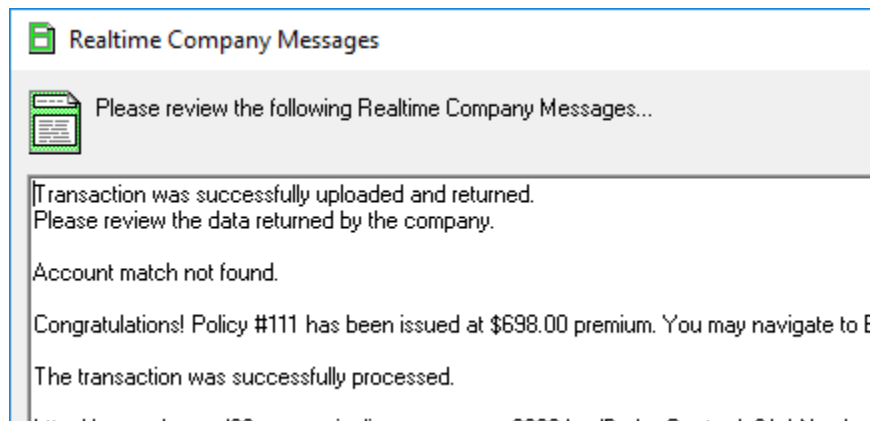
Once you have completed a new business application for Economical, right-click the application document in the Desktop Tree, and select **Real Time Upload** (see Figure 1.13).

(Figure 1.13)



A response will be returned from Economical within seconds, with details provided in the **Realtime Company Messages** window that displays (see Figure 1.14).

(Figure 1.14)



*If the new business application has been accepted, Economical will issue the policy from the information provided, and the policy will be sent back to you within seconds. The policy will appear in the Client folder in the Desktop Tree, and will open to the **TBW Coverages** tab in the Document Window.*

- An **Abeyance** with the Subject “Document uploaded... awaiting reply” will automatically be created when the Application is uploaded. If the Application is accepted, this Abeyance will automatically be marked as “Done” (see Figure 1.15).

(Figure 1.15)

CARLC05 - Address Validated

sons | Claims | Documents | Current Policies | Ledger Card | **Abeyance** | Activities | Client Info

	Status	Done	Abeyance Date	Time Stamp	Date Entered	Date Done	Done By	Producer	Pol Num	Subject
m	Active	<input checked="" type="checkbox"/>	May 15, 2018	May 15, 2018	May 15, 2018	May 15, 2018	Auto	LRUSSELL		Document uploaded... awaiting reply.
m	Active	<input type="checkbox"/>	May 15, 2018	May 15, 2018	May 15, 2018			LRUSSELL	111	Guidewire Realtime

Abeyance automatically marked as "Done" with accepted application

- Following the usual TBW workflow, a new Abeyance will automatically be generated for the newly downloaded policy.
  - If a different user is to transact the newly downloaded policy, the user who created the new policy must open this Abeyance and assign it to the applicable person.
  - Once the policy has been transacted, this Abeyance will be marked as completed, and the transacting user will have the opportunity to create any new Abeyances needed for your organization.

*If the new business application has not been successful, you will be informed in the **Realtime Company Messages** window and provided with a link to follow to view issues/reasons. Please also review Alerts on the **Alerts** tab in the IQ.*

Please contact Economical Broker System Support for assistance with questions regarding this feature. For questions you have about setup for Economical Online Quoting and Real-Time Upload, please contact our Client Services Team at [clientservices@cssionline.com](mailto:clientservices@cssionline.com) (email) or 1-888-291-3588 (toll-free telephone).

[Return to Contents](#)

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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