

10 October 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

1. [SGI CANADA Online Quoting for Auto Policies \(ON\)](#) – Brokers who write business in Ontario with SGI CANADA/Coachman can access SGI CANADA's Online Quoting directly from TBW and IntelliQuote for PPV auto policies for new business and renewals.

1. SGI CANADA Online Quoting for Auto Policies (ON)

Brokers who write business in Ontario with SGI CANADA/Coachman can access SGI CANADA's Online Quoting directly from TBW and IntelliQuote for PPV (private passenger vehicle) auto policies for new business and renewals. This integration of IntelliQuote with SGI CANADA's web service allows the broker to view web-service-based premium calculations for applicable policies in IntelliQuote.

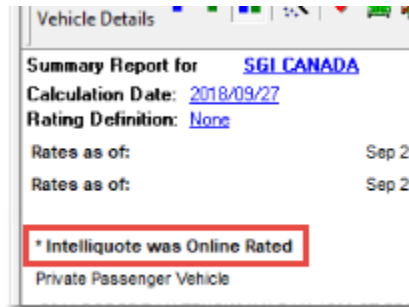
Note: If you need SGI CANADA enabled in your system, please contact Client Services for assistance.

Please note the following when using the SGI CANADA Online Quoting feature for auto policies:

- Brokers can quote up to 45 days in advance with the Quoting Tool.
- Online rating will be for private passenger vehicle types only.

- Please ensure the ABD (Agency, Branch, and Department) matches what was set up in TBW Lists for the Broker Number for SGI CANADA/Coachman.
- Please use the policy number for all renewals to ensure the correct loyalty and claims free discounts are applied.
- 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 1.1).

(Figure 1.1)



If you have any questions regarding the SGI CANADA Online Quoting feature, please contact your SGI CANADA 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.



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