

17 July 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 Auto Policies \(AB\)](#) – Brokers who write business in Alberta with Royal and Sun Alliance (RSA) can now access the Online Quoting feature directly from TBW and IntelliQuote for personal lines auto policies.

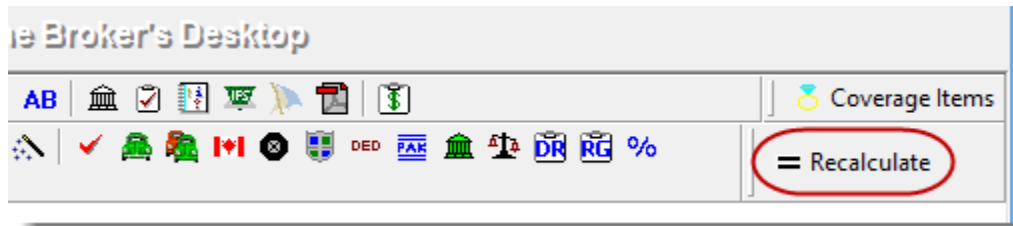
1. RSA Online Quoting for Auto Policies (AB)

Brokers who write business in Alberta with Royal and Sun Alliance (RSA) can now access the Online Quoting feature directly from TBW and IntelliQuote for personal lines auto policies.

What this will mean for you, the broker, is that RSA 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 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.

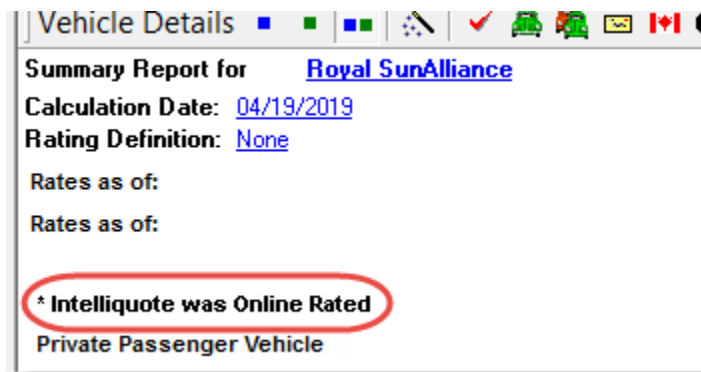
Once the simple, one-time setup ([see below](#)) has been completed, RSA's web service will automatically be called whenever you click the **Recalculate** toolbar button (see Figure 1.1) in an RSA personal lines auto IQ.

(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 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 private passenger vehicles, ATVs (all-terrain vehicles), trailers, motorcycles, motorhomes, mopeds, and snowmobiles.
- The Online Quoting feature is available for new business, renewal, and mid-term endorsement 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. Please refer any inquiry on a renewal quote to your Regional Underwriting team to review the renewal.
- 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.

Setup for RSA Online Quoting

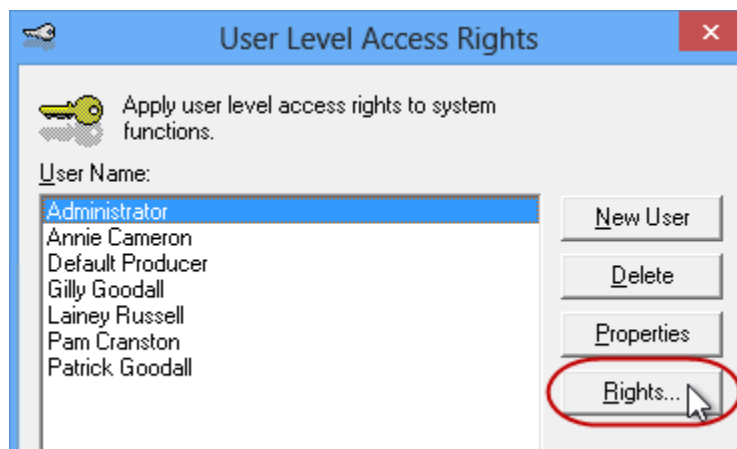
The following one-time setup for the RSA Online Quoting feature must be completed in TBW before the functionality can be used.

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,

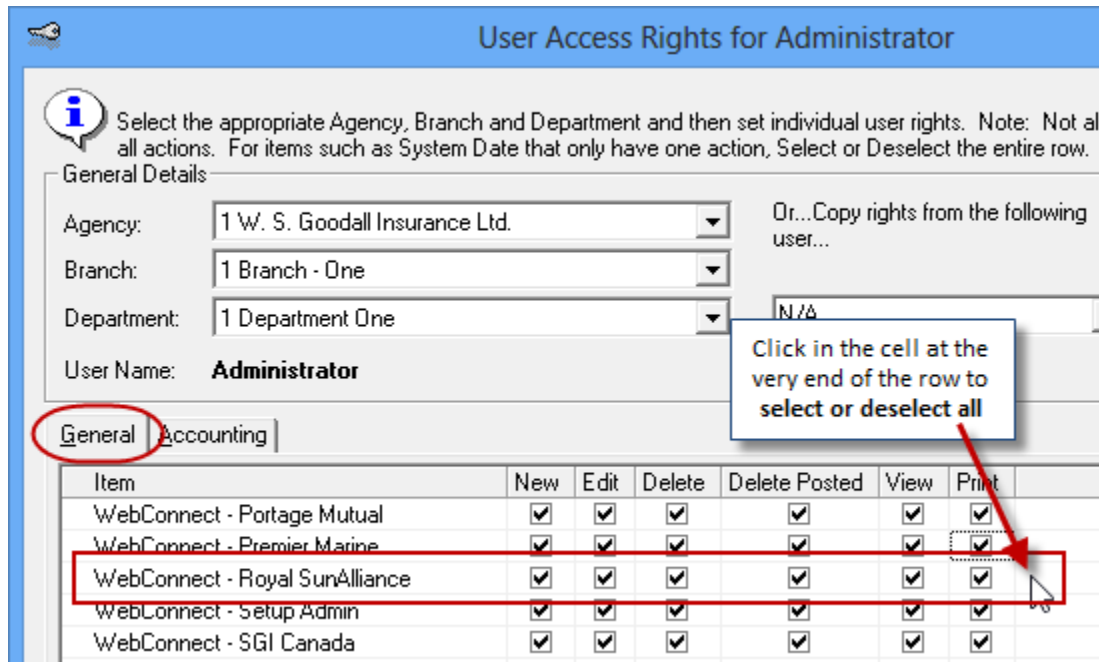
1. Ensure you have the required RSA User ID and Password.
 - This User ID and Password are required for WebConnect setup for “Royal SunAlliance (All)” in step 3 below.
 - If you require a User ID and Password, please contact your RSA Personal Lines representative for assistance.
2. Ensure appropriate **User Rights** for this feature are set up for applicable TBW users as follows:
 - a. In the TBW window, click **Tools, Administrative, User Manager**.
 - b. In the User Level Access Rights window, select the **User Name** and click the **Rights** button (see Figure 1.3).

(Figure 1.3)



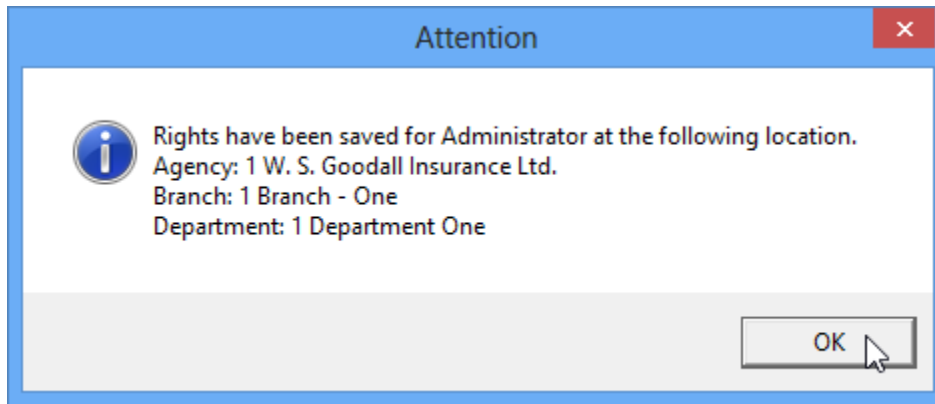
- c. On the **General** tab in the User Access Rights window, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Royal SunAlliance** (see Figure 1.4).

(Figure 1.4)



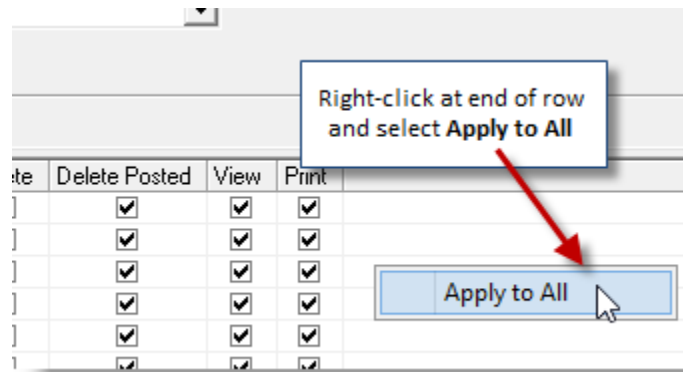
- d. Click **OK** in the User Access Rights window to save these rights for this user for this ABD, and then click **OK** in the Attention pop-up (see Figure 1.5).

(Figure 1.5)



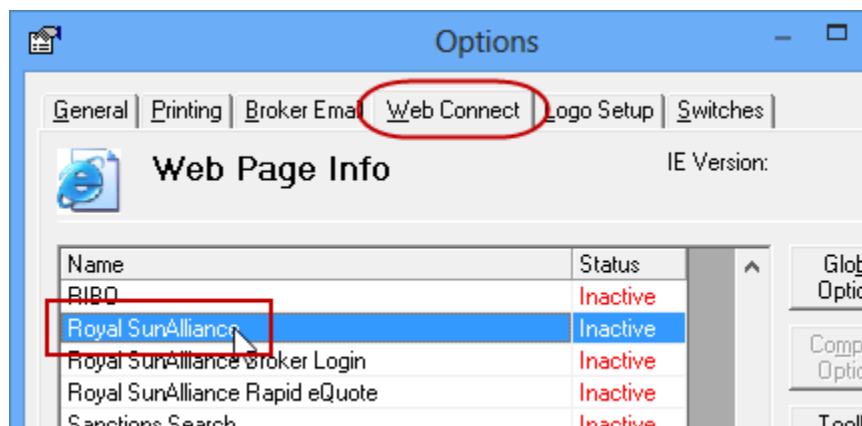
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – Royal SunAlliance* to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.6).

(Figure 1.6)



- 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 window, find and double-click **Royal SunAlliance** (see Figure 1.7).

(Figure 1.7)



- 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 1.8).

(Figure 1.8)

- vi. Click **OK** in the Save Username/Password pop-up.
- vii. Repeat these steps as necessary for additional ABDs and/or Users.
- viii. Click **Close** in the WebConnect Setup window.
 - o *Be sure to update WebConnect Setup details whenever you reset your password.*

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

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.

[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 (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)

To unsubscribe from our email notifications and updates, please contact us at info@cssionline.com or reply to this email.

Connect with us on [Facebook](#) and [Twitter](#) for product updates and other news!