17 January 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)**:
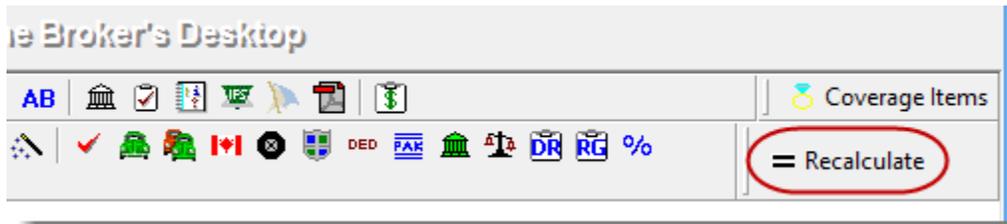
Contents

1.   Aviva Online Quoting for Auto Policies (ON)

Brokers in Ontario who write business with Aviva/Aviva Traders can now access the Online Quoting feature directly from TBW and IntelliQuote for Private Passenger Vehicle policies, effective January 17, 2019 for new business.

What this will mean for you, the broker, is that Aviva Canada rates for Private Passenger Vehicle policies will always be up-to-date and available to you real-time, because the rates will come directly and immediately from Aviva's system through a web call. This streamlined quoting process, with improved rating accuracy and rate updates in real-time, 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, Aviva's web service will automatically be called whenever you click the **Recalculate** button on the IQ toolbar (see Figure 1.1) in an Aviva Auto IQ with a Calculation Date on or after January 17 for new business.

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(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)
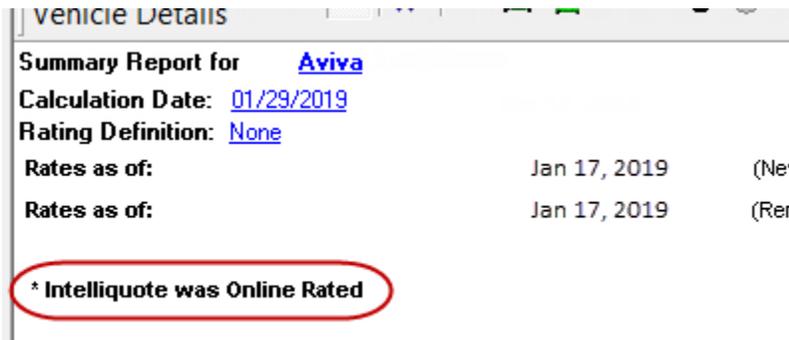
Any alerts that have been returned from the web service will instantly be displayed on the **Alerts** tab in the IntelliQuote, as well.

Here are a few points to keep in mind when you are using the Aviva 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.

- The Aviva Online Quoting feature is currently applicable only for Private Passenger Vehicle policies. Other policy types will continue to use TBW's local rating engine for quoting.

- 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.

Setup for Aviva Online Quoting

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

   ***Important**: Credentials required for the Aviva Online Quoting feature are the same as used previously in TBW, so users may already have completed some of the following required 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 Aviva WebConnect functions.*

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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).**

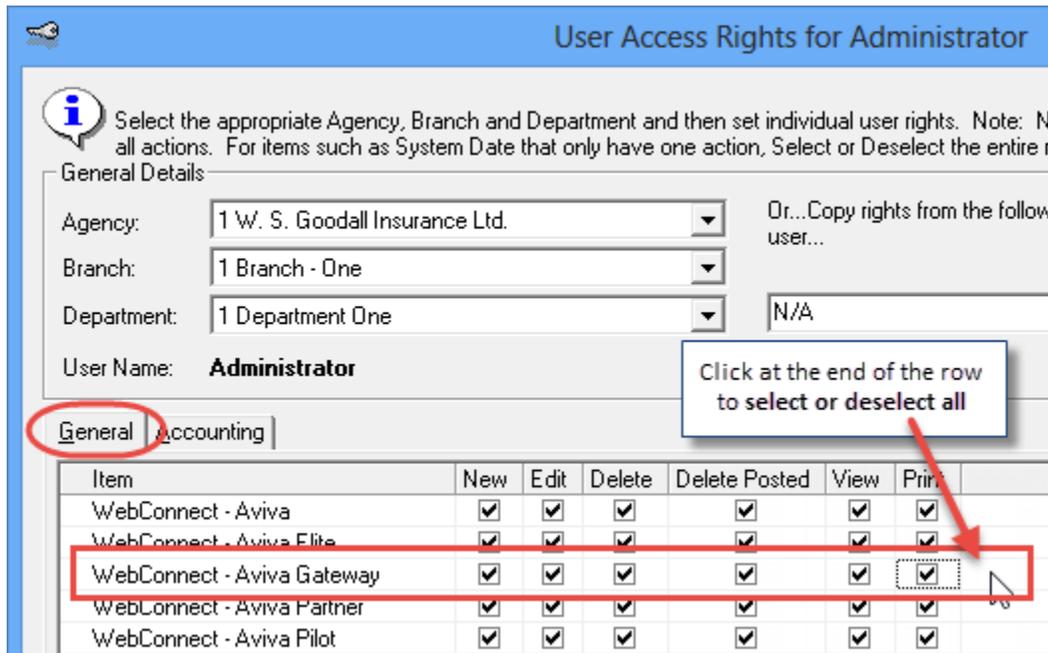To set up the Aviva Online Quoting feature,

1. Ensure you have the required Aviva User ID and Password.
   - If you require a User ID and Password, please contact your Aviva Personal Lines representative for assistance.

2. Ensure that **Broker Numbers** have been set up properly as follows:
   a. In the TBW window, click **Lists**, **Insurance Companies**.
   b. In the Lists window, double-click **Aviva**.
   c. Select the **Company Branch Details** tab and, in the **Broker Numbers** section, verify the following:
      - The applicable 8-digit and 10-digit broker numbers display for each ABD in your organization.
         o Note that broker numbers for online quoting are 10-digit numbers preceded by the letter "A" (e.g. something similar to A1000010412), while broker numbers for download are 8-digit numbers leading with the corresponding company number (i.e. 1 for Aviva / 2 for Traders – so something similar to 10010412 or 20000705). *Both types of broker numbers are required for proper setup.*
      - The A+10-digit online quoting number must be set as default.
      - Please do not delete any broker numbers already set up in TBW Lists.
   d. Click **OK** in the Aviva dialog, and click **OK** in the Lists dialog.

3. Next, ensure appropriate **User Rights** for this feature are set up for applicable TBW users:
   a. Click **Tools**, **Administrative**, **User Manager**.
   b. In the **User Level Access Rights** dialog, select the **User Name** and then click the **Rights** button (see Figure 1.3).
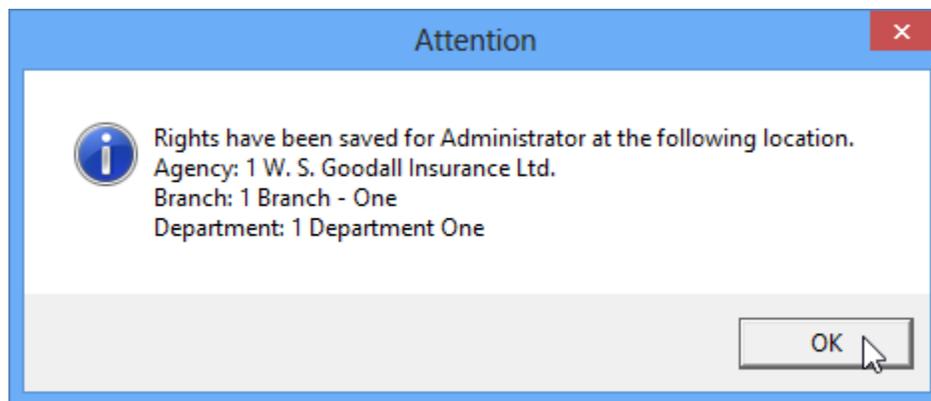
(Figure 1.3)
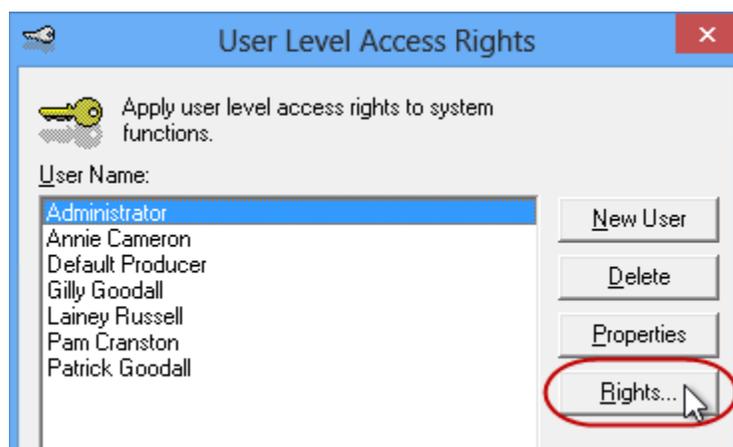
   c. On the **General** tab in the **User Access Rights** dialog, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Aviva Gateway** (see Figure 1.4).

The Broker's Workstation — INTEGRATED MANAGEMENT SYSTEM
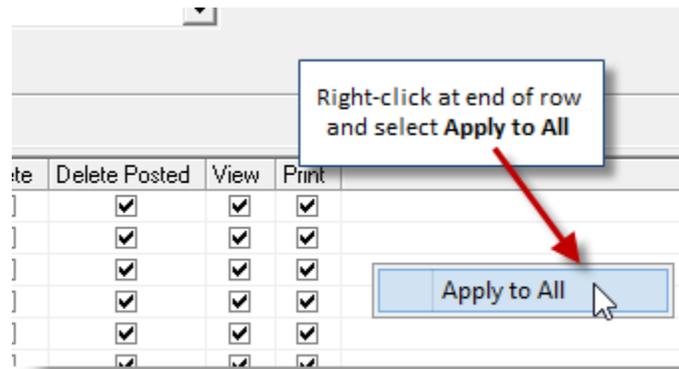The Underwriter's Workstation — INTEGRATED MANAGEMENT SYSTEM

(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** window (see Figure 1.5).
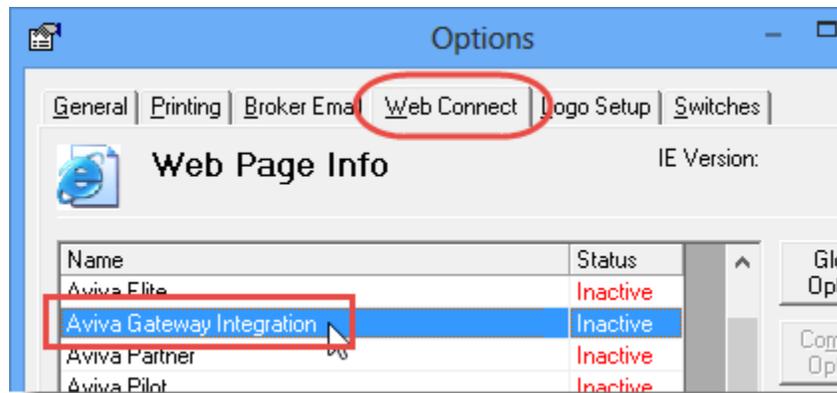
(Figure 1.5)

e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – Aviva Gateway* 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).

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(Figure 1.6)

f. Click **Close** in the **User Access Rights** window.

g. Repeat these steps 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 Aviva Gateway Integration 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 **Aviva Gateway Integration** (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. Enter the appropriate **Username** and **Password**.

iv. Click **Save** (see Figure 1.8).

The Broker's **Workstation** INTEGRATED MANAGEMENT SYSTEM   The Underwriter's **Workstation** INTEGRATED MANAGEMENT SYSTEM

6

(Figure 1.8)

v.   Click **OK** in the **Save Username/Password** box (see Figure 1.9).

(Figure 1.9)

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 WebConnect Setup details whenever you reset your password.*

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

5.   Close TBW, run the TBW Update Utility, 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 Aviva Online Quoting

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feature. For questions regarding the feature itself, please contact your Aviva Personal Lines representative for assistance.

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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