



29 August 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 Homeowner Policies \(PEI\)](#) – Brokers who write business in Prince Edward Island with RSA can now access the Online Quoting feature directly from TBW and IntelliQuote for homeowner policies, effective August 17, 2019 for new business and renewals.

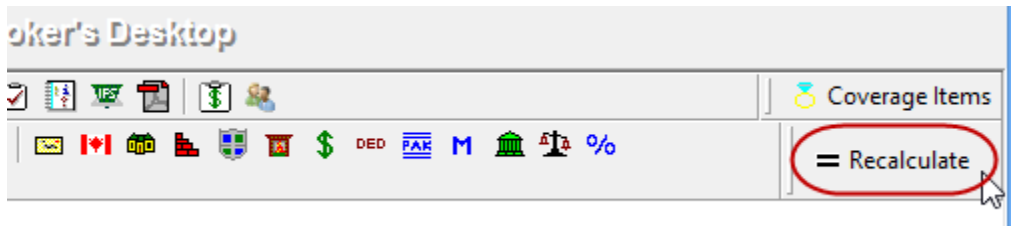
1. RSA Online Quoting for Homeowner Policies (PEI)

Brokers who write business in Prince Edward Island with Royal and Sun Alliance (RSA) can now access the Online Quoting feature directly from TBW and IntelliQuote for homeowner policies, effective August 17, 2019 for new business and renewals.

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

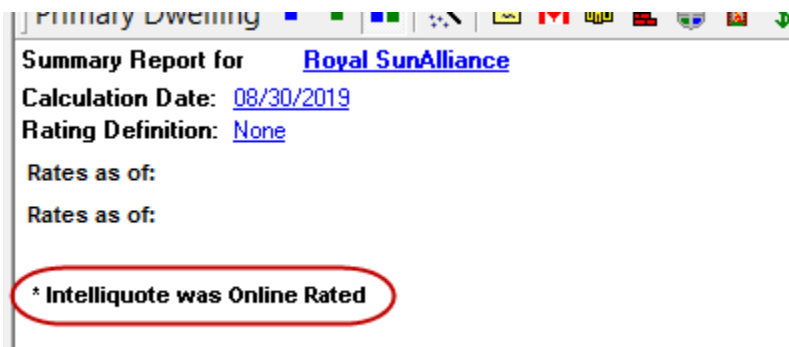
Once the one-time setup ([see below](#)) has been completed, RSA's web service will automatically be called whenever you click the **Recalculate** toolbar button (see Figure 1.1) in an RSA homeowner IQ with a Calculation Date on or after August 17 for new business and renewals.

(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.
- The Online Quoting feature is applicable for Homeowners policies (including *Broad*, *Comprehensive*, and *Platinum Plus* types for RSA).
 - As released previously, Online Quoting is also applicable for non-homeowner policies (including secondary non-homeowner dwellings).
- The Online Quoting feature is available for new policies, as well as renewal 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 and other factors on renewal policies, when performing an online quote and rating with RSA, the online quote rate may not match the renewal rating. Please refer any inquiry on a renewal quote to your Regional Underwriting team to review the renewal.
- When a pre-existing homeowner IQ is opened, it will continue to use TBW's local rating engine for quoting unless the Calculation Date is changed.

- In the IQ Summary Report, “Incl.” (rather than the percentage) will display for applicable Discounts/Surcharges (see Figure 1.3).

(Figure 1.3)

Dwelling:	\$500,000	
Personal Property:	\$350,000	
Outbuildings:	\$50,000	
Miscellaneous Discounts/Surcharges		
- Claims Free Dis. Applied		Incl.
- New Home Dis. Applied		Incl.
- Mature Citizen Dis. Applied		Incl.

Setup for RSA Online Quoting

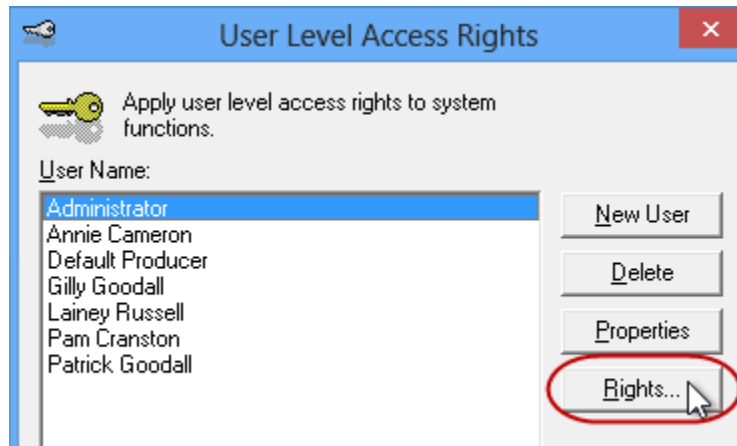
The following one-time setup for the RSA Online Quoting feature must be completed in TBW before the functionality can be used.

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,

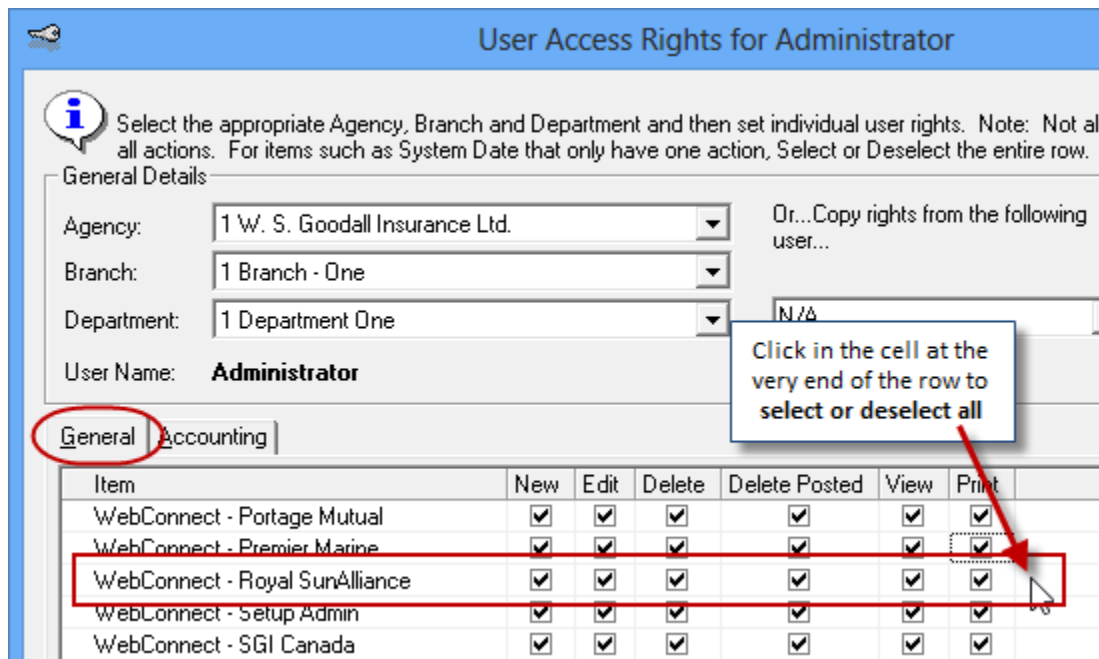
1. Ensure you have the required RSA User ID and Password.
 - This User ID and Password are required for WebConnect setup for “Royal SunAlliance (All)” in step 3 below.
 - If you require a User ID and Password, please contact your RSA Personal Lines representative for assistance.
2. Confirm appropriate **User Rights** for this feature are set up for applicable TBW users as follows:
 - a. Click **Tools, Administrative, User Manager**.
 - b. In the **User Level Access Rights** window, select the **User Name** and then click the **Rights** button (see Figure 1.4).

(Figure 1.4)



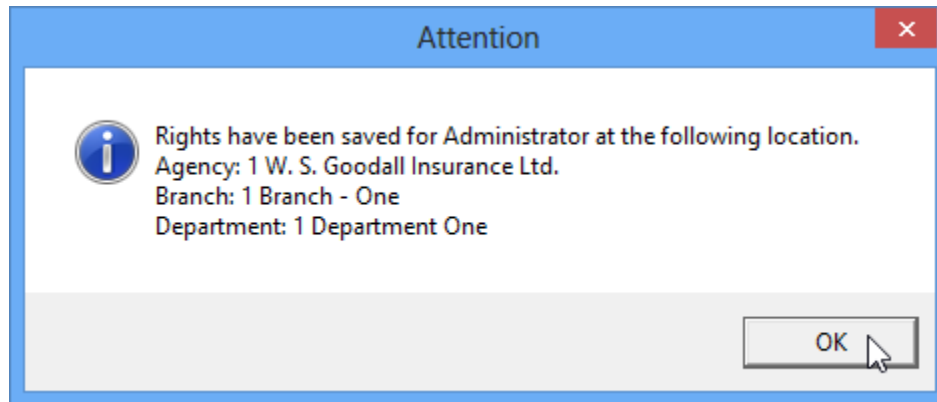
- c. On the **General** tab in the User Access Rights window, choose the ABD (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Royal SunAlliance** (see Figure 1.5).

(Figure 1.5)



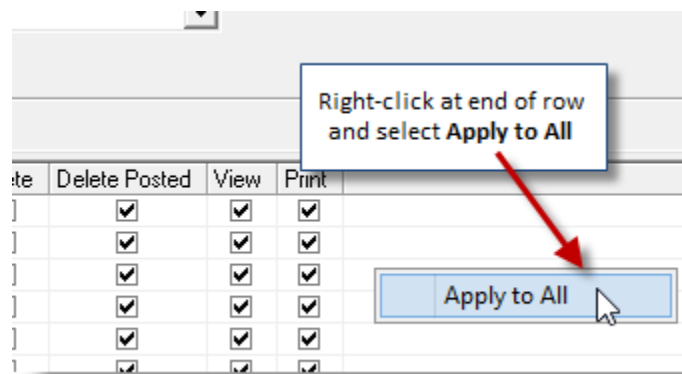
- d. Click **OK** in the User Access Rights window to save these rights for this user for this ABD, and then click **OK** in the Attention pop-up (see Figure 1.6).

(Figure 1.6)



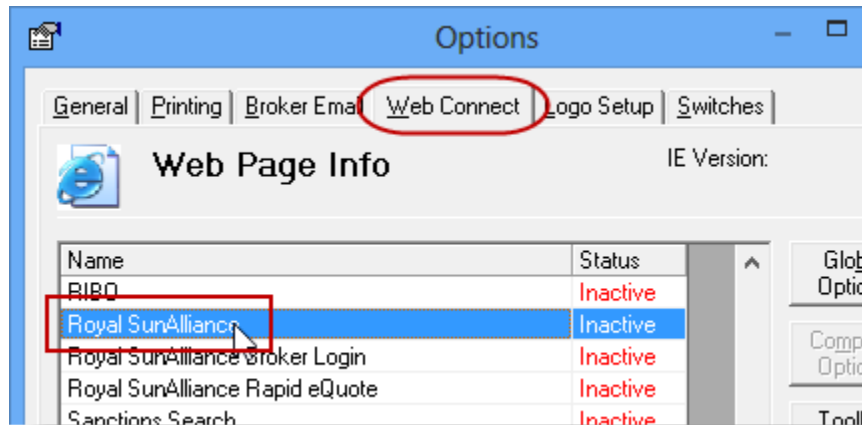
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – Royal SunAlliance* to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.7).

(Figure 1.7)



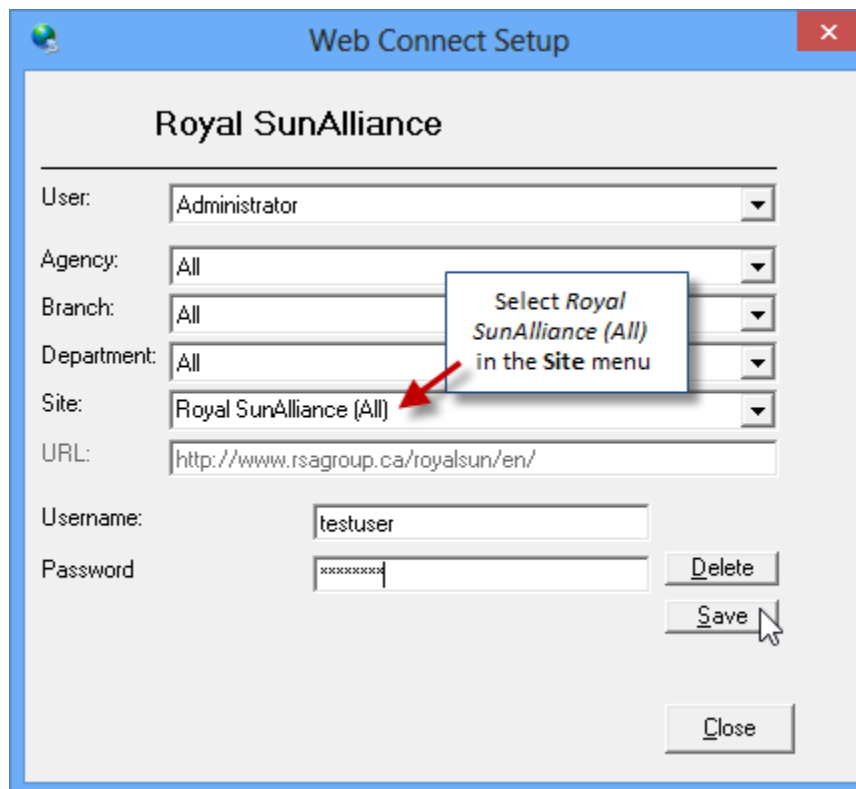
- f. Click **Close** in the **User Access Rights** window.
 - g. Repeat Steps b – f for each additional TBW user requiring these rights.
 - h. Click **OK** in the **User Level Access Rights** window.
3. Next, ensure applicable TBW users are set up for RSA in **WebConnect** as follows.
 - a. Click **Tools, Options** in the TBW window.
 - b. On the **WebConnect** tab in the Options window, find and double-click **Royal SunAlliance** (see Figure 1.8).

(Figure 1.8)



- 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 1.9).

(Figure 1.9)



- 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.

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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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