

12 March 2020

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*

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1. [Aviva Online Quoting for Auto Policies \(NB, NS, PEI\)](#) – Brokers in New Brunswick, Nova Scotia, and Prince Edward Island who write business with Aviva/Aviva Traders can now access the Online Quoting feature directly from TBW and IntelliQuote for new business Private Passenger Vehicle policies.

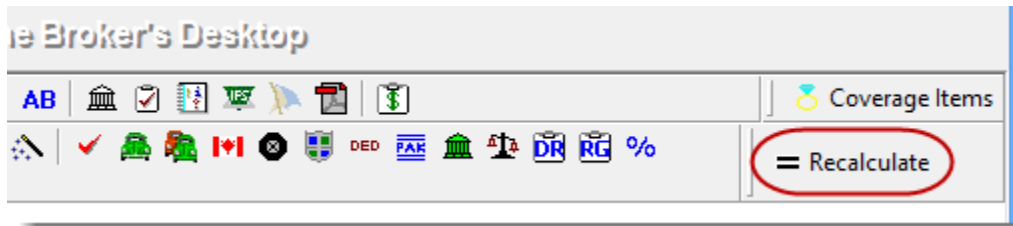
## 1. Aviva Online Quoting for Auto Policies (NB, NS, PEI)

Brokers in New Brunswick, Nova Scotia, and Prince Edward Island who write business with Aviva/Aviva Traders can now access the Online Quoting feature directly from TBW and IntelliQuote for new business Private Passenger Vehicle policies.

What this will mean for you, the broker, is that Aviva rates for Private Passenger Vehicle policies will always be up-to-date and available to you Realtime, 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 Realtime, will enhance the customer experience and enable you to do business more efficiently and responsively.

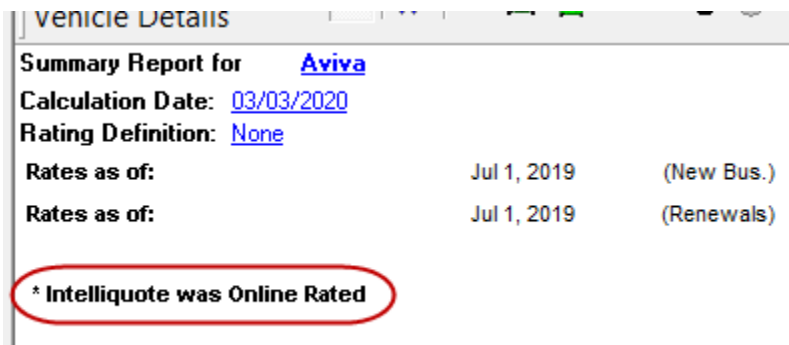
Once the simple, one-time setup ([see below](#)) has been completed, Aviva's web service will automatically be called whenever you click the **Recalculate** button on the IQ toolbar (see Figure 1.1) in an Aviva Auto IQ.

(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 Aviva Auto 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:** Users may have already 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. 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,

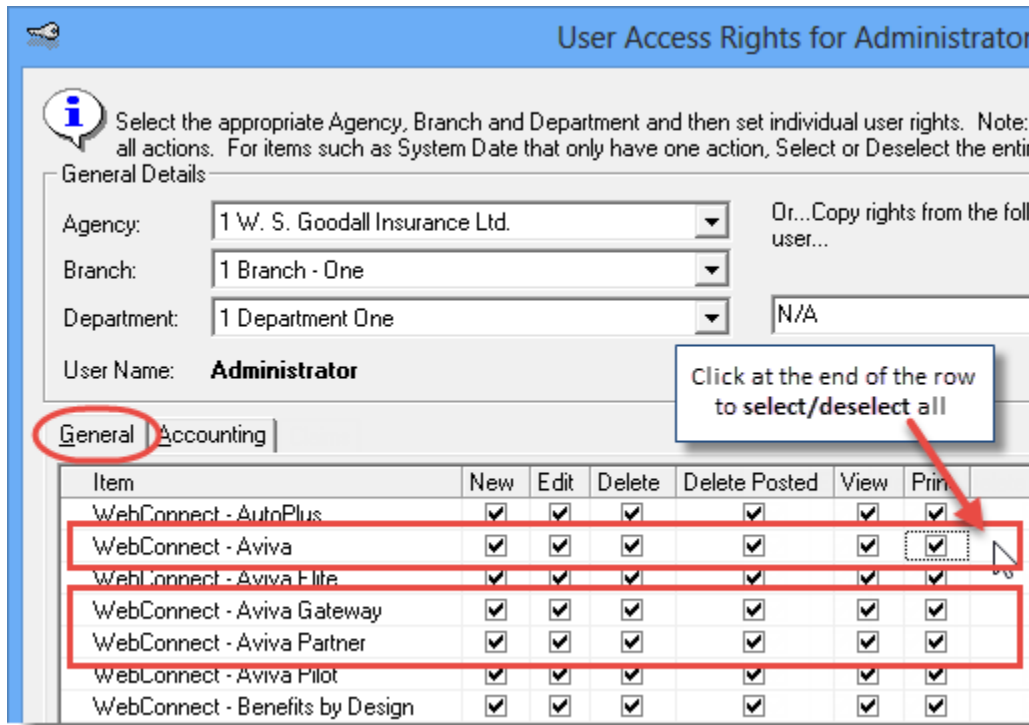
1. Ensure you have the required Aviva User ID and Password.
  - This Username and Password are required for WebConnect setup in step 4 below. If you require a User ID and Password, please contact your Aviva Personal Lines representative for assistance.
2. Confirm that **Broker Numbers** have been set 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 broker numbers display for each ABD in your organization.
      - Note that broker numbers for online quoting are 8-digit numbers (with no alpha characters) (i.e. something similar to 10010412 or 20000705).
    - **If the 8-digit broker numbers have not been set up, they must be added, and I-Biz Defaults/I-Biz Folder Defaults must be set up for each number.** Please contact Client Services for assistance in setting up broker numbers for Aviva Online Quoting.
    - **Please do not modify or delete any broker numbers already set up in TBW Lists** (these existing numbers are used for downloads).
  - d. Click **OK** in the Aviva window, and click **OK** in the Lists window.
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 window, select the **User Name** and then click the **Rights** button (see Figure 1.3).

(Figure 1.3)



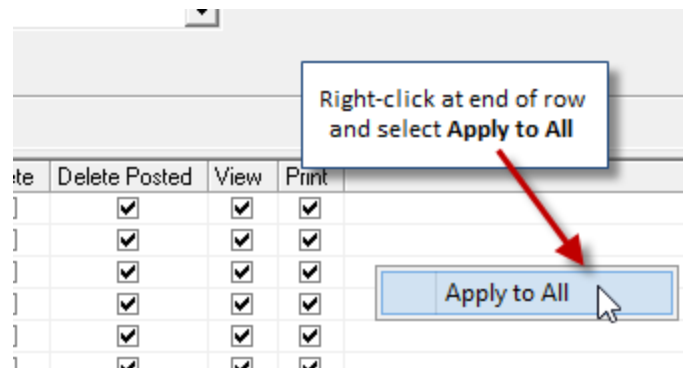
- c. On the **General** tab in the User Access Rights window, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Aviva**, **WebConnect – Aviva Gateway**, and **WebConnect – Aviva Partner** (see Figure 1.4).

(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.
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights to **all** ABDs for this user, right-click at the end of the corresponding row and click **Apply to All** in the right-click menu (see Figure 1.5).

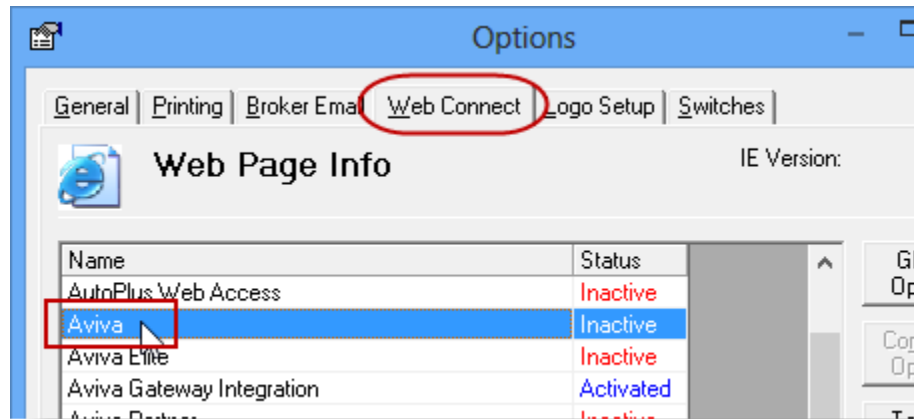
(Figure 1.5)



- 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, ensure applicable TBW users are set up for Aviva, Aviva Gateway Integration, and Aviva Partner 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 **Aviva** (see Figure 1.6).

(Figure 1.6)



- c. In the **WebConnect Setup** window,
  - i. Select the applicable **User**.
  - ii. Select **All** or the applicable **ABD** (Agency/Branch/Department).
  - iii. Ensure **Aviva (All)** is selected in the **Site** menu.
  - iv. Enter the appropriate **Username** and **Password**.
  - v. Click **Save** (see Figure 1.7).

(Figure 1.7)

- 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.
- d. Repeat these steps to enter WebConnect details for **Aviva Gateway Integration** (see Figure 1.8) and **Aviva Partner** (see Figure 1.9).

(Figure 1.8)

The screenshot shows a Windows-style dialog box titled "Web Connect Setup" with a close button (X) in the top right corner. The main title is "Aviva Gateway Web Setup" with the Aviva logo. The form contains the following fields and controls:

- User: A dropdown menu with "Administrator" selected.
- Agency: A dropdown menu with "All" selected.
- Branch: A dropdown menu with "All" selected.
- Department: A dropdown menu with "All" selected.
- URL: A text input field containing "http://service.gateway.cq.aviva.com/".
- Username: A text input field containing "testuser".
- Password: A text input field with masked characters "xxxxxxx".
- Buttons: "Delete", "Save", and "Close". A mouse cursor is hovering over the "Save" button.

(Figure 1.9)

The screenshot shows a Windows-style dialog box titled "Web Connect Setup" with a close button (X) in the top right corner. The main title is "Aviva Partner" with the Aviva logo. The form contains the following fields and controls:

- User: A dropdown menu with "Administrator" selected.
- Agency: A dropdown menu with "All" selected.
- Branch: A dropdown menu with "All" selected.
- Department: A dropdown menu with "All" selected.
- Site: A dropdown menu with "Aviva Partner (All)" selected.
- URL: A text input field containing "https://www.avivapartner.ca/home".
- Username: A text input field containing "testuser".
- Password: A text input field with masked characters "xxxxxxx".
- Buttons: "Delete", "Save", and "Close". A mouse cursor is hovering over the "Save" button.

- Be sure to update WebConnect Setup details whenever you reset your password.

- e. Click **OK** in the Options window.
5. Close TBW, run the TBW Update Utility, and then reopen the program.

Please contact our Client Services Team at [clientservices@cssionline.com](mailto: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 feature. For questions regarding the feature itself, please contact your Aviva 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](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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