

17 April 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) and Intact Insurance are pleased to announce the release of the following enhancements and new features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

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1. [Intact Online Quoting for Auto Policies \(AB\)](#) – Brokers who write business in Alberta with Intact Insurance can now access the Online Quoting feature directly from TBW and IntelliQuote for Private Passenger Vehicle policies, effective February 15, 2020 for new business.

## 1. Intact Online Quoting for Auto Policies (AB)

Brokers who write business in Alberta with Intact Insurance can now access the Online Quoting feature directly from TBW and IntelliQuote for Private Passenger Vehicle policies, effective February 15, 2020 for new business.

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

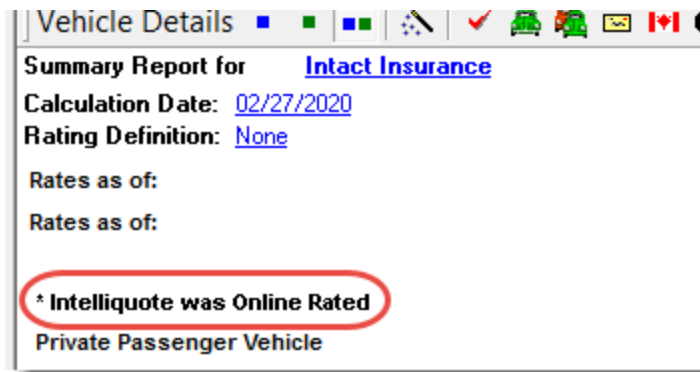
Once the simple, one-time setup ([see below](#)) has been completed, Intact's web service will automatically be called whenever you click the **Recalculate** button on the IQ toolbar (see Figure 1.1) in an Intact Auto IQ with a Calculation Date on or after February 15 for new business.

(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 Intact 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 Intact 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.
- Currently, the Online Quoting feature is available only for new business quotes.
- 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 Intact Online Quoting

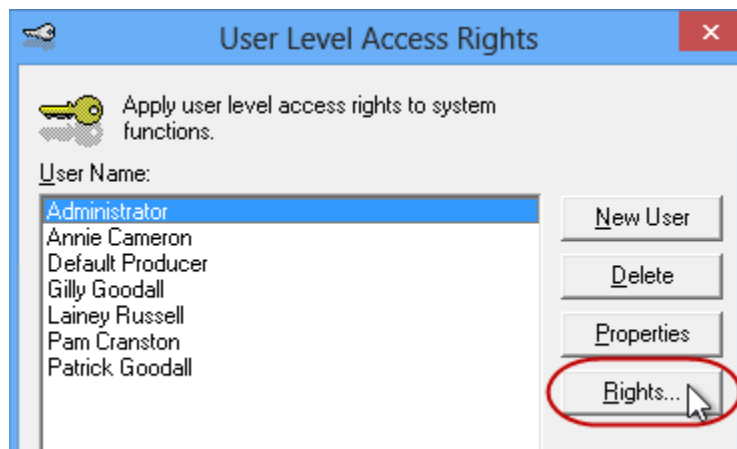
The following one-time setup for the Intact Online Quoting feature must be completed in TBW before the functionality can be used.

**\*\*Important:** Users may already have completed the following setup 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 Intact WebConnect functions. \*\*

To set up the Intact Online Quoting feature,

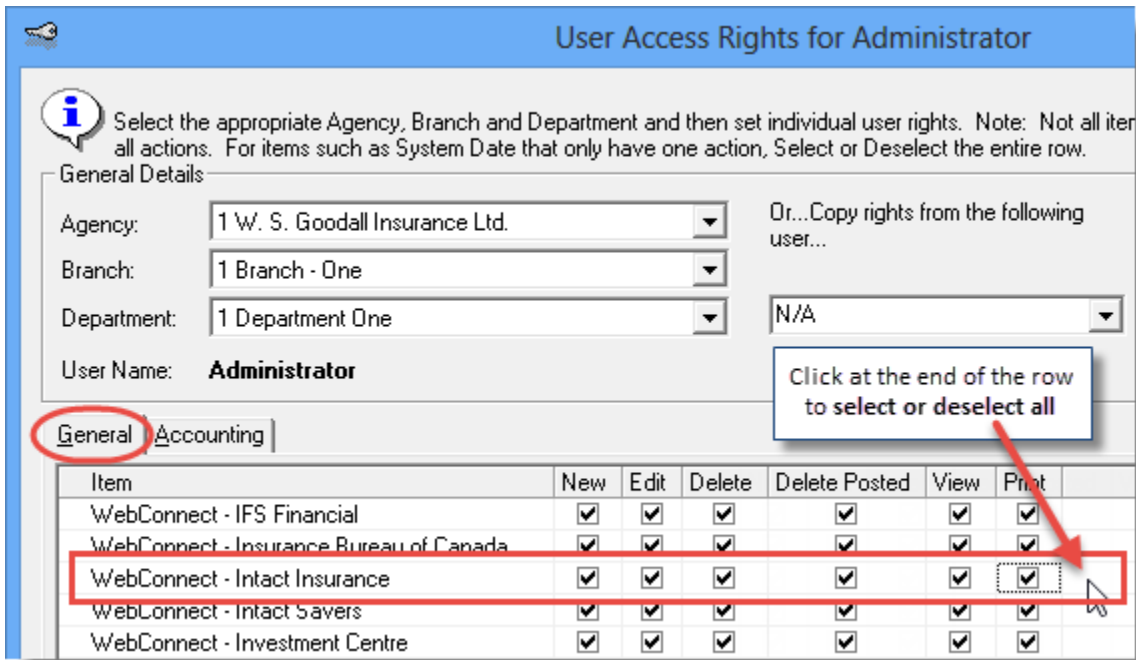
1. Ensure you have the required Intact User ID and Password.
  - This User ID and Password are required for WebConnect setup for “Intact Insurance” in step 3 below.
  - If you require a User ID and Password, please contact your Intact Personal Lines representative for assistance.
2. Ensure appropriate **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** dialog, select the **Username** and then click the **Rights** button (see Figure 1.3).

(Figure 1.3)



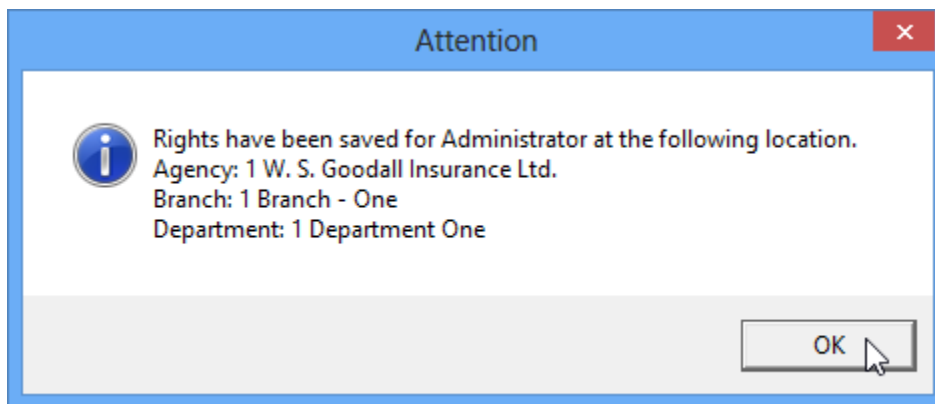
- c. On the **General** tab in the User Access Rights window, select the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Intact Insurance** (see Figure 1.4).

(Figure 1.4)



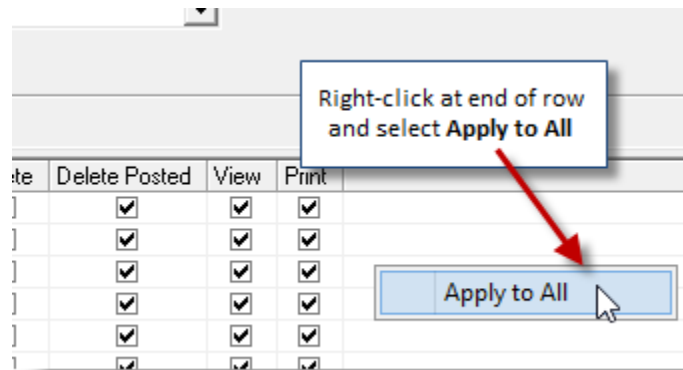
- d. Click **OK** in the **User Access Rights** window to save these rights for this user for this ABD, and then click **OK** in the **Attention** pop-up (see Figure 1.5).

(Figure 1.5)



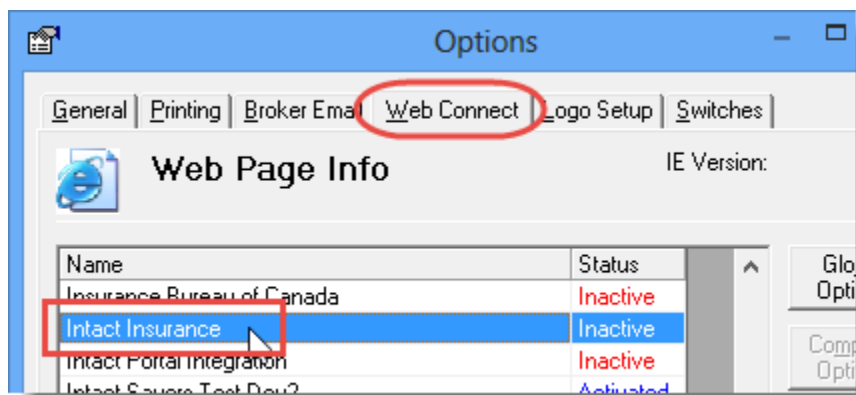
- e. If required, repeat Steps c – d for additional ABDs for this user, or, to apply the selected rights for *WebConnect – Intact Insurance* to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.6).

(Figure 1.6)



- f. Click **Close** in the **User Access Rights** window.
  - g. Repeat these steps for each additional TBW user requiring these rights.
  - h. Click **OK** in the **User Level Access Rights** window.
3. Next, ensure each applicable TBW user is set up for Intact 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 **Intact Insurance** (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. Ensure **Intact Insurance (All)** is selected in the Site menu.
  - iv. Enter the appropriate **Username** and **Password**.
  - v. Click **Save** (see Figure 1.8).

(Figure 1.8)

**Web Connect Setup**

**Intact Insurance**

User: Administrator

Agency: All

Branch: All

Department: All

Site: Intact Insurance (All)

URL: http://www.intact.ca/home

Username: testuser

Password: [masked]

Buttons: Delete, Save, Close

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

(Figure 1.9)

**Save Username/Password**

Username and Password Added to Agency/Branch/Department!

Button: OK

vii. Repeat these steps as necessary for additional ABDs and/or users.

viii. 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.

4. Close TBW 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 Intact Online Quoting feature. For questions regarding the feature itself, please contact your Intact 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.



**Microsoft** Partner

Gold Independent Software Vendor (ISV)

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