

16 March 2020

To: Users of The Broker's Workstation and/or The Underwriter's Workstation

Dear Valued Client:

Re: The Broker's Workstation and The Underwriter's Workstation – Important Releases and Changes

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. [Wawanesa Online Quoting and Realtime Upload \(AB Auto\)](#) – Brokers in Alberta who write business with Wawanesa Insurance can access Online Quoting and Realtime Upload directly from TBW and IntelliQuote for new business Personal Lines Auto policies.

1. Wawanesa Online Quoting and Realtime Upload (AB Auto)

Brokers in Alberta who write business with Wawanesa Insurance can access Online Quoting and Realtime Upload directly from TBW and IntelliQuote for new business Personal Lines Auto policies.

What this will mean for you, the broker, is that Wawanesa rates for personal auto policies will always be up-to-date and available to you Realtime, because the rates will come directly and immediately from Wawanesa's system through a web call. In addition, with Realtime data exchange, you will receive a response to your Realtime upload within seconds. If the new business application that has been uploaded is accepted, the new policy document will be sent back in near Realtime.

Once the one-time setup for this feature ([see below](#)) has been completed, proceed to create a new or modify an existing Wawanesa Auto IntelliQuote in the usual way. Wawanesa's web service will

automatically be called whenever you click the **Recalculate** button on the IQ toolbar (see Figure 1.1) for a Wawanesa personal auto IQ.

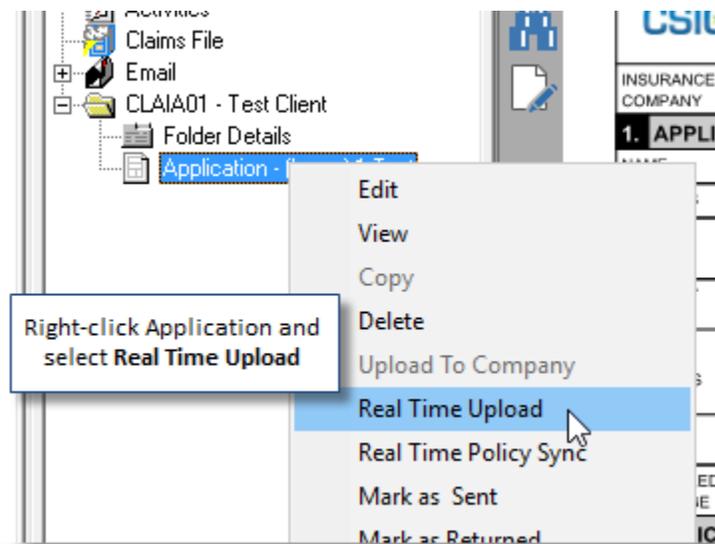
(Figure 1.1)



The results of the web service call will be displayed immediately on the **Summary Report** tab in the IntelliQuote. Any alerts that have been returned from the web service will instantly be displayed on the **Alerts** tab, as well.

In addition, the "Realtime Upload" option will be available for new business applications. Once you have completed a new business auto application for Wawanesa, right-click the application document in the Desktop Tree, and select **Realtime Upload** (see Figure 1.2).

(Figure 1.2)



A response will be returned from Wawanesa within seconds, with details provided in the upload message box.

- **Note: If the upload message box says "Compliance," the upload will go straight through.**
 - If the message says "Info: Compliance: ... Underwriting review required," it will not be held for review (even though it says 'underwriting review required') and should be returned immediately with the policy download.

If the new business application has been accepted, Wawanesa will issue the policy from the information provided, and the policy will be sent back to you within seconds. The policy will appear in the Client folder in the Desktop Tree, and will open to the **TBW Coverages** tab in the Document Window.

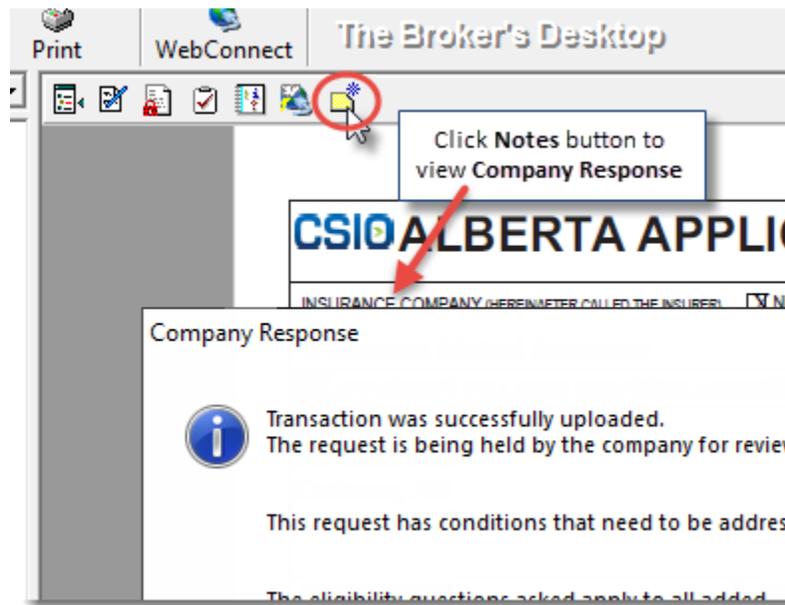
- An **Abeyance** with the Subject "Document uploaded... awaiting reply" will automatically be created when the Application is uploaded. If the Application is accepted, this Abeyance will automatically be marked as "Done."
- Following the usual TBW workflow, a new Abeyance will automatically be generated for the newly downloaded policy.
 - If a different user is to transact the newly downloaded policy, the user who created the new policy must open this Abeyance and assign it to the applicable person.
 - Once the policy has been transacted, this Abeyance will be marked as completed, and the transacting user will have the opportunity to create any new Abeyances needed for your organization.

If the new business application has not been successful, you will be informed in the upload message box.

Once the new business application has been uploaded, click the **Notes** button on the Application toolbar (see Figure 1.3) to open the Company Response window and review the message sent by the company on upload, if needed. (This option may be useful, for example, if you did not receive a Realtime return policy and cannot remember the company message received after the upload.)

- This toolbar button will only be available after the Realtime upload. Note that you may need to refresh the application to view the button.

(Figure 1.3)



Important Points – Wawanesa Online Quoting and Realtime Upload

Here are a few important points to keep in mind when you are using Wawanesa Online Quoting and Realtime Upload.

- **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 Wawanesa 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.
- **Do not delete a Wawanesa policy that has been downloaded in Realtime unless Wawanesa advises you to do so.** Note that Realtime downloads will not display in the processing screen, and so cannot be deleted and reprocessed.
- Batch Transact and Auto Transact are not affected by Realtime download. Realtime downloads from Wawanesa, which are automatically returned through a web connection, will not Auto Transact or be available in Batch Transact. For Realtime downloads, the user can either transact the Realtime download at the time, or reassign the download Abeyance to the appropriate person for transacting.
- 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 to the current or a future date.
- At this time, online quoting and Realtime upload are not supported for Endorsement Requests for Wawanesa. Instead, please use Wawanesa's BluePass Broker portal for policy change.

Data Entry/IQ Tips for Wawanesa Online Quoting and Realtime Upload

When you are creating or updating a Wawanesa Auto IQ, please follow these important guidelines.

- In the Client folder, only one client name is to be entered in each **Insureds** field in the Client folder (see Figure 1.4).
 - Also, **no characters** (such as an ampersand – '&') can be entered in either Insureds field. If a character exists in either the first or second Insureds field, you will be informed that the Named Insured does not match the Person. In this case, remove the character from the Client folder, check the folder in and out, and recalculate the IntelliQuote before proceeding.

(Figure 1.4)



- The name in the **Registered Owner** field, the name in the **Insureds** field, and the name on the **Persons** tab must exactly match. In addition, the name in each of these fields must be in proper case style, and cannot be entered in all capital letters.
- The name in the first Insureds field **MUST** be a registered owner for at least one vehicle for the IQ to rate properly. If you select only the second Insured as a registered owner, the IQ will fail to rate.
- Ensure **License Class and valid dates** are entered for each Driver. Missing or inconsistent dates may result in Alerts (e.g. "Driver is too young for the selected driver class null" or "Driver class – missing required field 'driver class'").
- **MVRs** are required.
- Overrides are not enabled for Wawanesa Online Quoting.
- For **Account Types**:
 - **Individual** – Enter individual names in the Insureds fields. If the individuals have a business using a registered trading name only (not a legal entity), that trading name can be entered in the Organization field. This field has no impact on rating or the actual named Insured on the return policy.
 - **Corporation** – This account type is used for business accounts where company names are actual legal entities (i.e. Inc. or Ltd.). The corporate name is entered in the Name field. A registered trading name can be added, if desired, but this information will not display on the return policy.

Endorsements

- **End. #39 – Accident Rating Waiver** is no longer available for Wawanesa in the Alberta region.
 - If you are adding SEF 39 for companies other than Wawanesa, ensure Wawanesa is set to "Inactive" when adding the endorsement. Proceed to set the endorsement to policy wide and select applicable drivers.
- Claims Protection Plan is available as an Endorsement Coverage.

- For SEF 27 Endorsement...
 - If an additional vehicle is added to an IQ with an existing SEF 27 endorsement, an error Alert may display. Simply delete the existing SEF 27 and add it again to avoid this Alert.
 - If you use a pre-existing IQ to quote and this IQ has SEF 27, remove the endorsement, recalculate the IQ, and then re-add the endorsement at the vehicle level and then the policy level so it is applied correctly for all companies. In this situation, remember to disable the endorsement at the vehicle level for Wawanesa (as it is a policy wide coverage item).
- Suggested workflow for policy level endorsements:
 - a. Create the IQ in the usual manner and, as you reach the first Endorsement tab, add any coverage items that apply to the vehicle, and then continue on.
 - b. After the last OK, when you are taken back to the Optional Coverages tab, click the Endorsements/Extensions tab and add Endorsement 27 and CPP (this will allow you to apply those two items at the policy level).
 - c. Proceed to complete the IQ in the usual way.

Setup for Wawanesa Online Quoting and Realtime Upload

The following one-time setup for Wawanesa Online Quoting and Realtime Upload must be completed in TBW before the functionality can be used.

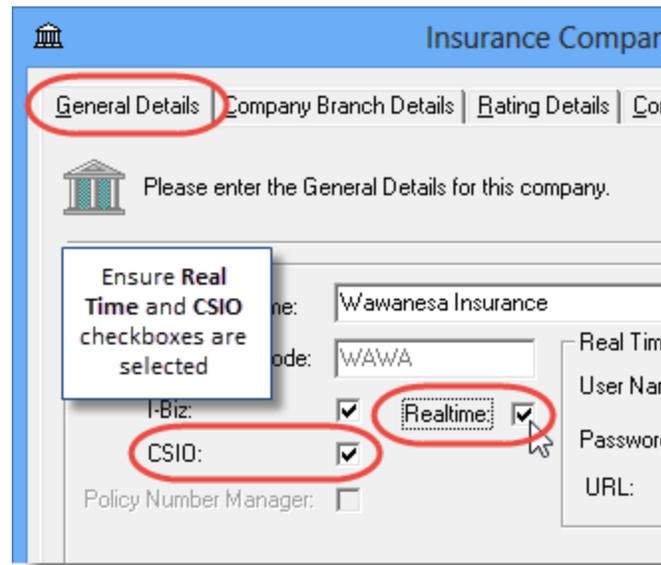
Please note, users may already have completed some of the following setup steps (e.g. for User Rights and WebConnect). In this situation, these steps will only need to be completed for new users or if your office has never used any Wawanesa WebConnect functions. Broker number setup is also required (but this, along with I-Biz Defaults and I-Biz Folder Defaults for each number, should already have been set up).

Important: Before you begin, please ensure you have the required broker numbers from Wawanesa (these are required for broker number setup, as described below). Please also ensure you have the required User ID/Password for WebConnect setup as described below. Please contact your Wawanesa Personal Lines representative for assistance if you do not have the required broker numbers or username/password.

Follow these steps to complete setup for Wawanesa Online Quoting and Realtime Upload.

1. Ensure there is only one instance of Wawanesa in the Insurance Company List using the Wawanesa Rating Engine.
2. Ensure the Realtime and CSIO options are selected in TBW Lists as follows:
 - a. In the TBW window, click **Lists, Insurance Companies**.
 - b. In the **Lists** window, double-click **Wawanesa**.
 - c. On the **General Details** tab in the Wawanesa dialog, ensure the **Realtime and CSIO checkboxes** are selected (see Figure 1.5).

(Figure 1.5)



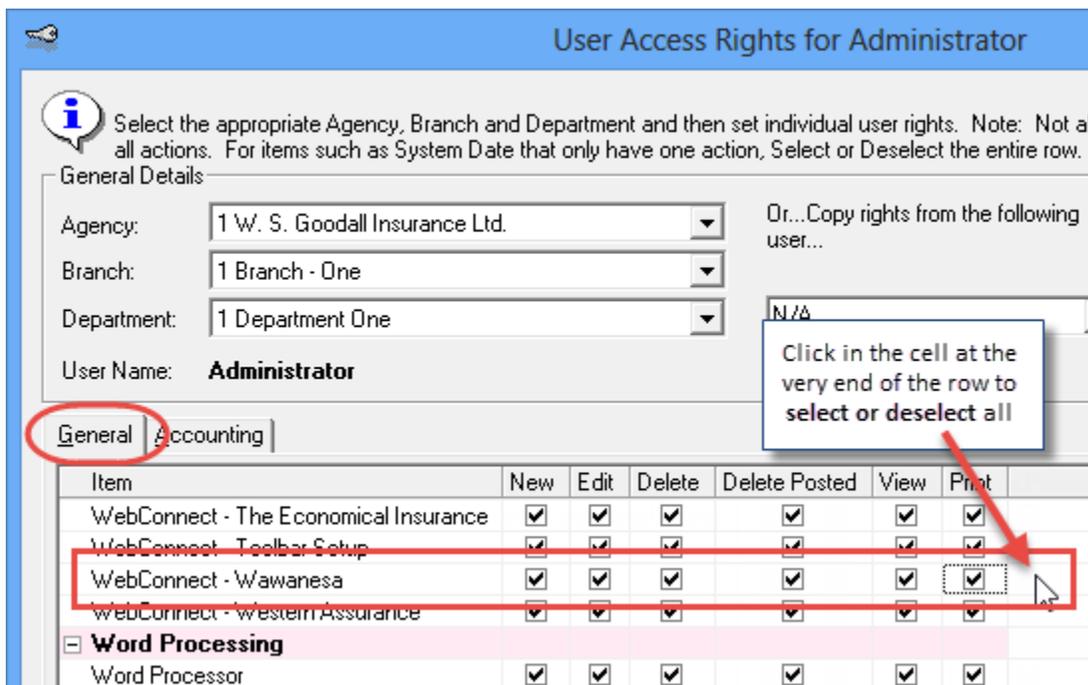
3. Still in the Wawanesa dialog, select the **Company Branch Details** tab and, in the **Broker Numbers** section, verify the following:
 - The applicable 7-digit and 10-digit broker numbers display for each ABD in your organization.
 - Note that broker numbers for Guidewire (Online Quoting/Realtime Upload) are 7-digit numbers, while broker numbers for CSIO are 10-digit numbers. *Both types of broker numbers are required for proper setup.*
 - The 7-digit Guidewire number must be set as default for use on applications.
 - Do not use 10-digit CSIO numbers on Realtime applications.
 - If you are setting up additional broker numbers in TBW Lists, please ensure there is no trailing whitespace if you copy/paste the broker number into TBW.
4. Click **OK** in the Wawanesa window, and click **OK** in the Lists window.
5. 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 1.6).

(Figure 1.6)



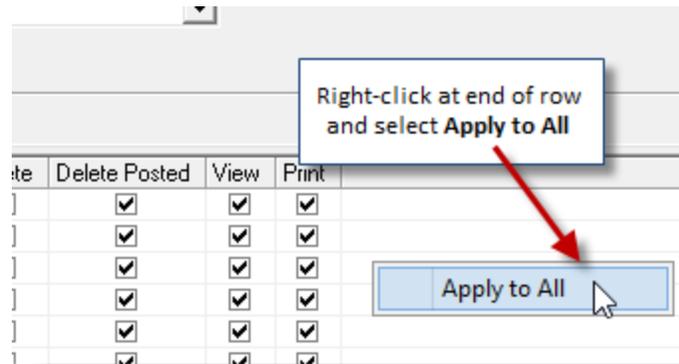
- c. On the **General** tab in the **User Access Rights** dialog, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Wawanesa** (see Figure 1.7).

(Figure 1.7)



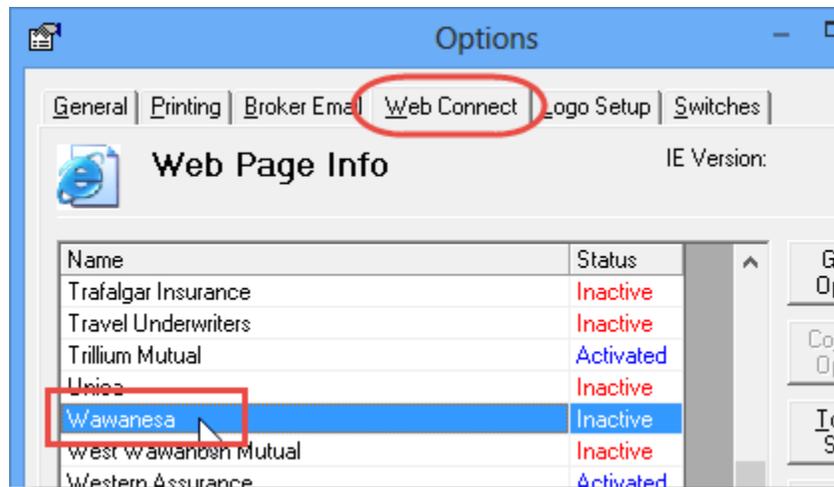
- d. Click **OK** in the **User Access Rights** window to save these rights for this user for this ABD, and then click **OK** in the **Attention** window.
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for **WebConnect – Wawanesa** to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.8).

(Figure 1.8)



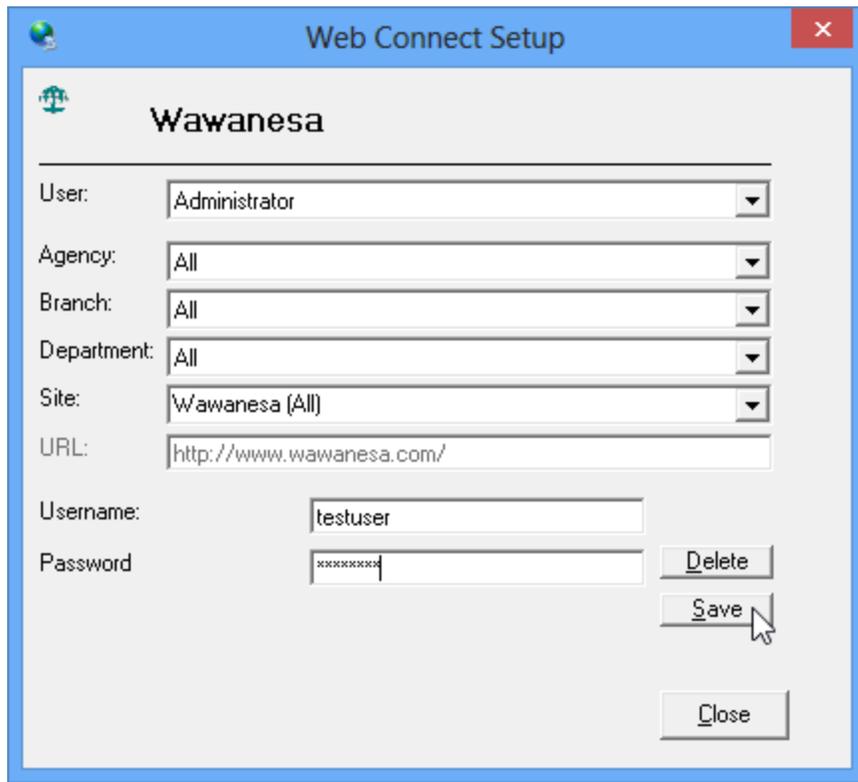
- f. Click **Close** in the **User Access Rights** window.
 - g. Repeat Steps b – f for each additional TBW user requiring these rights.
 - h. Click **OK** in the **User Level Access Rights** window.
6. Next, ensure each applicable user is set up for Wawanesa in WebConnect as follows:
- a. Click **Tools, Options** in the TBW window.
 - b. On the **WebConnect** tab in the Options dialog, find and double-click **Wawanesa** (see Figure 1.9).

(Figure 1.9)



- c. In the **WebConnect Setup** window,
 - i. Select the applicable **User**.
 - ii. Select **All** or the applicable **ABD** (Agency, Branch, and Department).
 - iii. Ensure **Wawanesa (All)** is selected in the **Site** menu.
 - iv. Enter the appropriate **Username** and **Password**.
 - v. Click **Save** (see Figure 1.10).

(Figure 1.10)



- vi. Click **OK** in the **Save Username/Password** box.
 - 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.
7. Close TBW and run the Update Utility.

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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.



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Gold Independent Software Vendor (ISV)

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