

8 February 2021

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 Habitational Policies \(SK\)](#) – Brokers in Saskatchewan who write business with Aviva can now access Online Quoting directly from TBW and IntelliQuote for new business Primary Homeowners, Condo, and Tenant policies, as well as Secondary Residences added to a Homeowners, Condo, or Tenant policy.

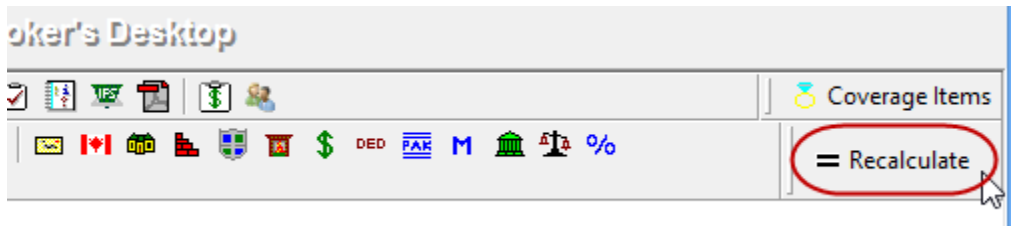
1. Aviva Online Quoting for Habitational Policies (SK)

Brokers in Saskatchewan who write business with Aviva can now access Online Quoting directly from TBW and IntelliQuote for new business Primary Homeowners, Condo, and Tenant policies. Aviva Online Quoting is also available for Secondary Residences added to a Homeowners, Condo, or Tenant policy, as well as for standalone FEC and standalone Seasonal Dwelling policy types.

What this will mean for you, the broker, is that Aviva rates for habitational 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 will enhance the customer experience and enable you to do business more efficiently and responsively.

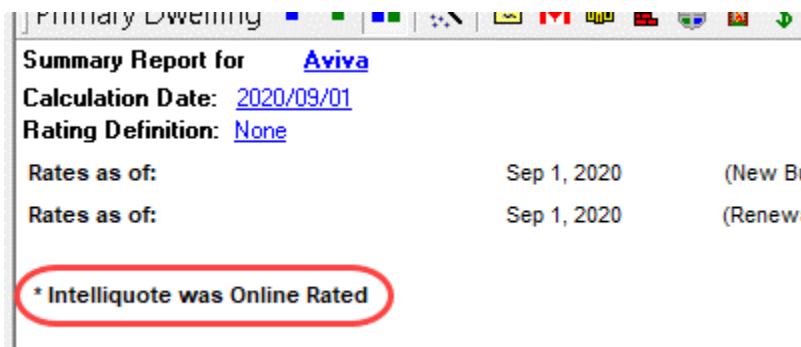
Once the simple, one-time setup ([see below](#)) has been completed, Aviva's web service will automatically be called whenever you click the **Recalculate** button on the IQ toolbar (see Figure 1.1) in an Aviva Property IQ.

(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 be indicated in the IQ (see Figure 1.2).

(Figure 1.2)



Any alerts that have been returned from the web service will be displayed on the Alerts tab in the IntelliQuote.

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.
- Aviva Online Quoting is available for new business Primary Homeowners, Condo, and Tenant policies. Aviva Online Quoting is also available for Secondary Residences added to a Homeowners, Condo, or Tenant policy, as well as for standalone FEC and standalone Seasonal Dwelling policy types.
 - Secondary Residences include Additional Residence House, Additional Residence Condo, add-on Rented Dwelling, add-on Rented Condo, and add-on Seasonal Dwelling.
- When a pre-existing Aviva habitational IQ is opened, it will continue to use TBW's local rating engine for quoting unless the Calculation Date is changed.

Alert Messages

When using the Aviva Online Quoting feature, please note the following regarding Alert messages.

- Aviva Rate API service accepts a maximum of 10 Endorsements per dwelling. In excess of this, the system will throw the message:
Exception Occurred.
Unable to generate premium due to region errors. Please contact Aviva Support team.
Transaction id: xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx
 - **Note:** A clear message is being reviewed for a future enhancement.
- System generated alerts “*Exception Occurred*” + “*Endorsement Not Written*” + “*Quote unsuccessfully rated – Reference number – xxxxxxxxxxxxxx*” mean the risk is not eligible for the endorsement added or the selected coverage type for that endorsement.
- The informational alert shown below is expected to fire when the floater added to the risk is rated using manufactured rates.
The selected Personal Floater is not available for the Rate API. Please review.
- For Aviva, the following message will be generated by the floaters “Furs,” “Gardening Tractor,” and “Jewellery.” If you receive this alert, you can remove the item and recalculate the IntelliQuote.
Invalid Combination.
Quote unsuccessfully rated – Reference number – xxxxxxxxxxxxxxx

Setup for Aviva Online Quoting

The following one-time setup for Aviva Online Quoting must be completed in TBW before the feature 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. Before you begin, ensure you have the required Aviva User ID and Password for WebConnect setup as described 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**.

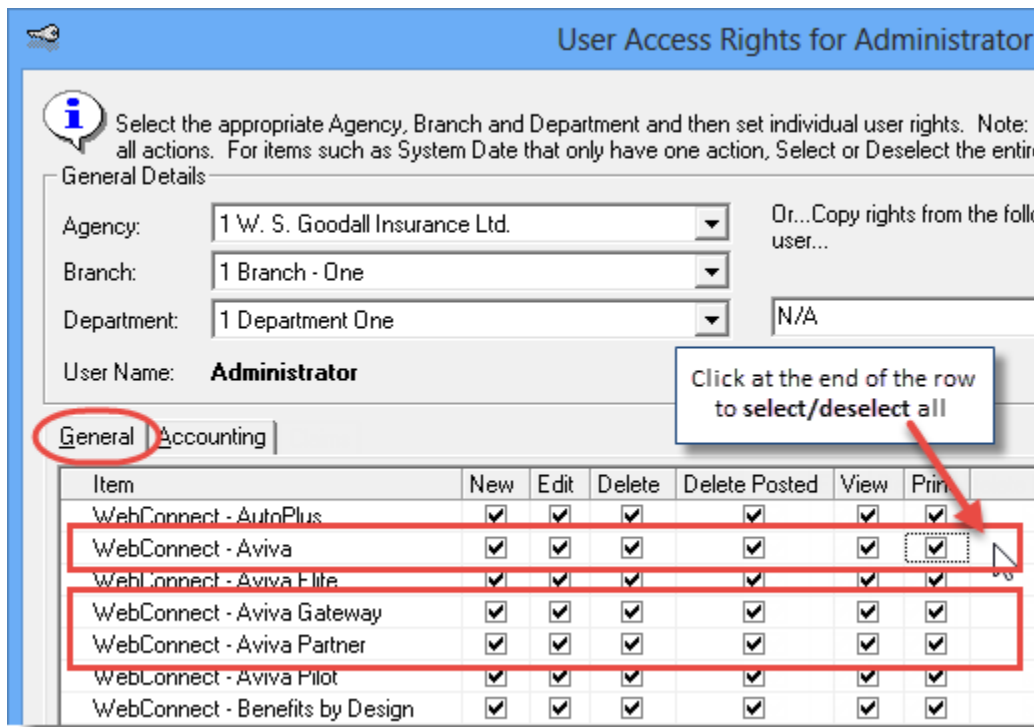
- c. Select the **Company Branch Details** tab and, in the **Broker Numbers** section, verify the following:
 - The applicable 8-digit broker numbers display for each ABD (Agency, Branch, and Department) in your organization.
 - Note that broker numbers for online quoting are 8-digit numbers (with no alpha characters) (i.e. something like 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. Set appropriate **User Rights** for this feature for applicable TBW users as follows.
 - a. Click **Tools, Administrative, User Manager**.
 - b. In the User Level Access Rights window, select the **Username** and click the **Rights** button (see Figure 1.3).

(Figure 1.3)



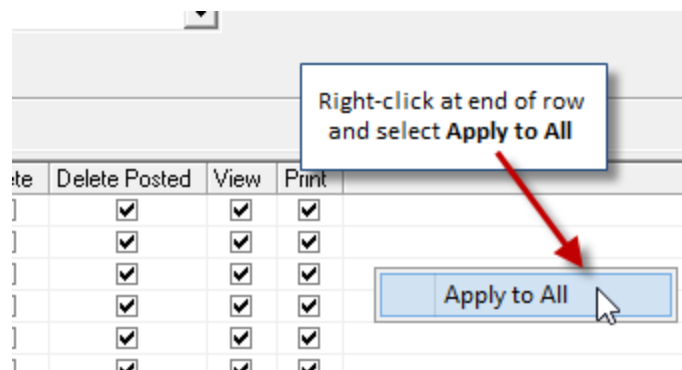
- c. On the **General** tab in the User Access Rights window, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Aviva**, **WebConnect – Aviva Gateway**, and **WebConnect – Aviva Partner** (see Figure 1.4).

(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).

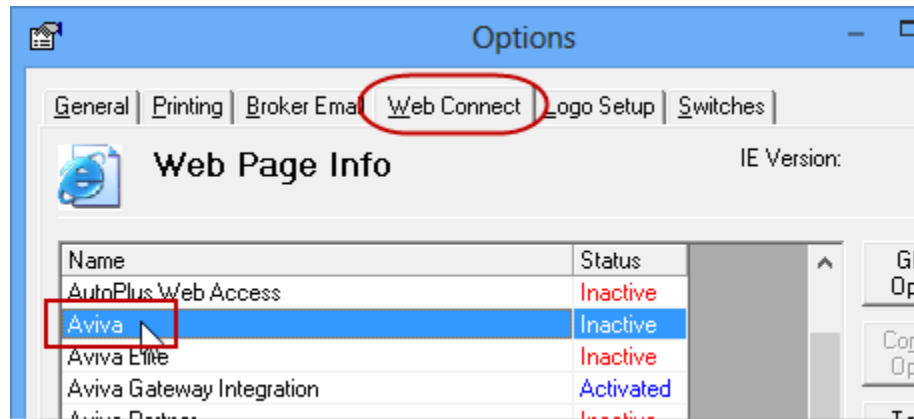
(Figure 1.5)



- 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**.
 - a. Click **Tools, Options** in the TBW window.
 - b. On the **WebConnect** tab in the Options window, 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, and 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 content area is titled "Aviva Gateway Web Setup" and features the Aviva logo. It contains several form fields: "User:" with a dropdown menu set to "Administrator"; "Agency:" with a dropdown menu set to "All"; "Branch:" with a dropdown menu set to "All"; "Department:" with a dropdown menu set to "All"; "URL:" with a text box containing "http://service.gateway.cq.aviva.com/"; "Username:" with a text box containing "testuser"; and "Password:" with a masked text box (asterisks) and a "Delete" button to its right. Below the password field are "Save" and "Close" buttons. A mouse cursor is pointing at 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 content area is titled "Aviva Partner" and features the Aviva logo. It contains several form fields: "User:" with a dropdown menu set to "Administrator"; "Agency:" with a dropdown menu set to "All"; "Branch:" with a dropdown menu set to "All"; "Department:" with a dropdown menu set to "All"; "Site:" with a dropdown menu set to "Aviva Partner (All)"; "URL:" with a text box containing "https://www.avivapartner.ca/home"; "Username:" with a text box containing "testuser"; and "Password:" with a masked text box (asterisks) and a "Delete" button to its right. Below the password field are "Save" and "Close" buttons. A mouse cursor is pointing at 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 (email) or 1-888-291-3588 (toll-free telephone) with any questions you have about setup for Aviva Online Quoting. 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 (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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