

5 July 2021

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. [Gore Mutual Online Quoting for Auto Policies \(ON\)](#) – Available July 5, 2021, brokers who write business in Ontario with Gore Mutual can access their Online Quoting feature for Personal Lines Auto policies, effective July 19 for new business and renewals.

1. Gore Mutual Online Quoting for Auto Policies (ON)

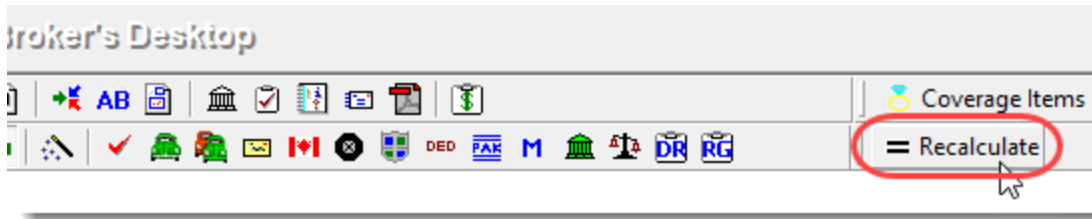
Available July 5, 2021, brokers who write business in Ontario with Gore Mutual can access their Online Quoting feature directly from TBW and IntelliQuote for Personal Lines Auto policies, effective July 19 for new business and renewals.

- **Online quoting is available as of July 5 on quotes effective July 19 and going forward. Quotes with an effective or calculation date prior to July 19 will be rated as manufactured rating.**

With online quoting, Gore Mutual rates for Auto policies will always be up-to-date and available to you Realtime, because the rates will come directly and immediately from Gore Mutual'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 for the online quoting feature, Gore Mutual's web service will automatically be called whenever you click the **Recalculate** button on the IQ toolbar (see Figure 1.1) for a Gore Mutual Auto IQ with a Calculation Date on or after July 19 for new business and renewals.

(Figure 1.1)

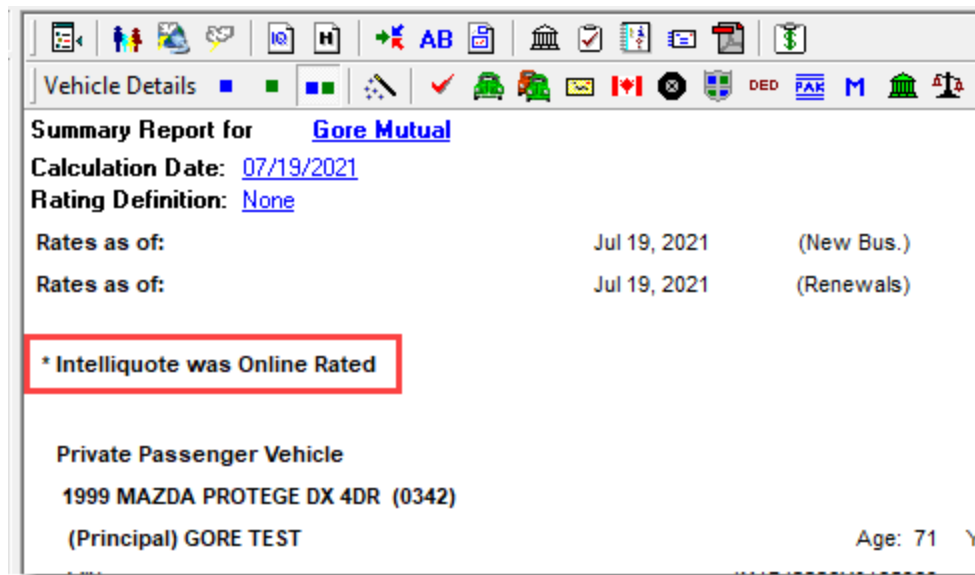


The results of the web service call will be displayed on the Summary Report tab in the IQ, and any alerts that have been returned from the web service will be available on the Alerts tab.

Please note the following when using the Gore Mutual Online Quoting feature:

- Online quoting is available as of July 5, 2021 on quotes effective July 19 and going forward. Quotes with an effective or calculation date prior to July 19 will be rated as manufactured rating.
- Gore Mutual's online rating is effective for Personal Lines Auto policies, including PPV (Private Passenger Vehicle), Trailer, Motorhome, Snowmobile, ATV, and individually rated commercial auto (Commercial Vehicle and Commercial Trailer).
 - Gore Mutual online quoting does not currently support Motorcycle or Moped.
- With online rating, the text "IntelliQuote was Online Rated" will appear on the Summary Report tab in the IQ (see Figure 1.2).

(Figure 1.2)



- When a pre-existing Gore Mutual Auto IQ is opened, it will continue to use TBW's local rating engine for quoting unless the Calculation Date is changed.

Data Entry/IQ Tips for Gore Mutual Online Quoting

When you are creating or updating a Gore Mutual Auto IQ, please remember these important points.

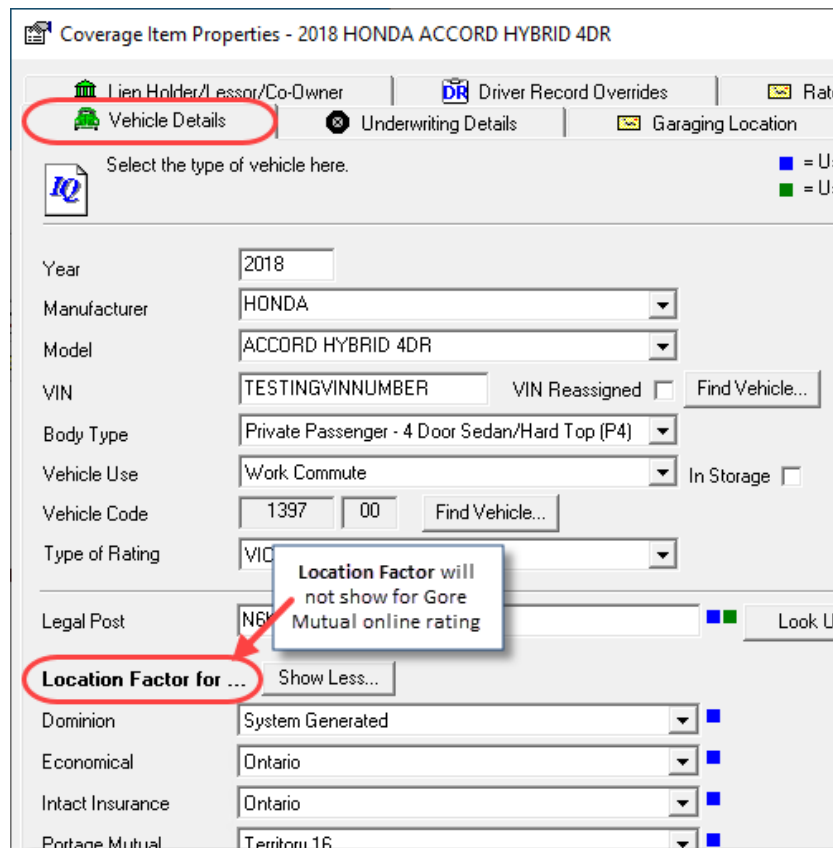
- Addresses used in TBW will be verified against Canada Post specifications. These specifications are regularly changing, and if the verification is for any reason unable to complete, the following alert message will appear (see Figure 1.3).

(Figure 1.3)



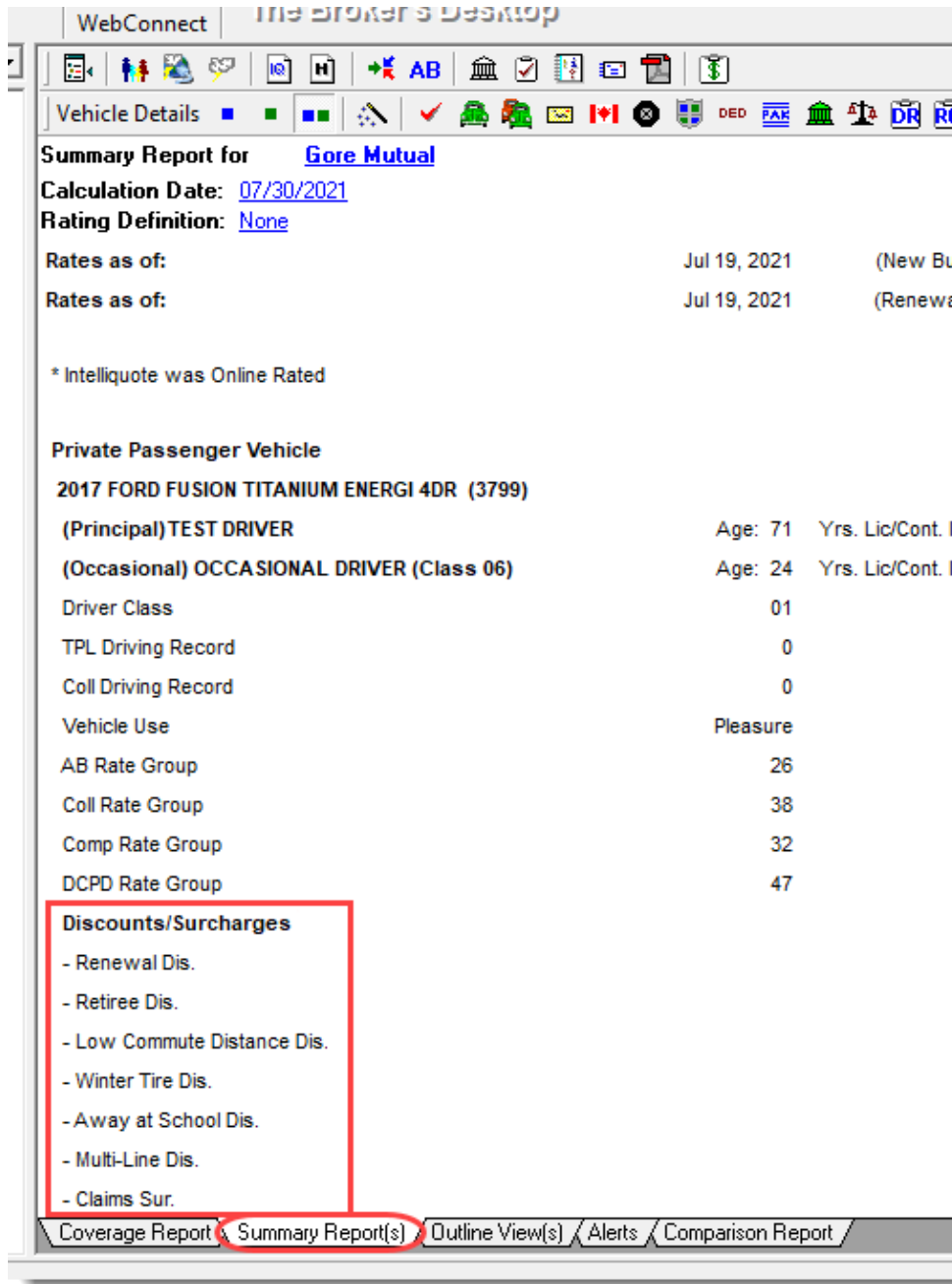
- The **Location Factor** has been removed for Gore Mutual on the Vehicle Details tab in Coverage Item Properties (see Figure 1.4).

(Figure 1.4)



- Driver Class, Driver Record, and Rate Group Overrides are not enabled for Gore Mutual online quoting.
- Any Discounts/Surcharges that are in effect for Gore Mutual will be listed on the **Summary Report** tab; however, the percentage for the discount/surcharge will not be shown (see Figure 1.5). The returned premium will include applicable discounts/surcharges.
 - The discount/surcharge percentage will not be shown on the **Coverage Report** tab, either.

(Figure 1.5)



Setup for Gore Mutual Online Quoting

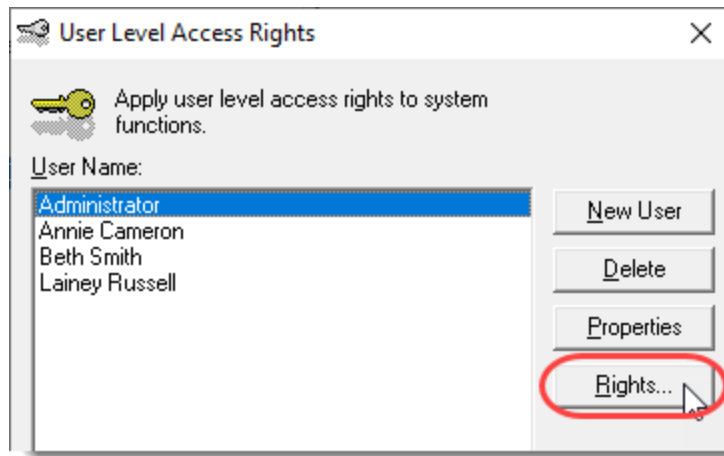
The following one-time setup for Gore Mutual Online Quoting must be completed in TBW before the feature can be used.

****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 Gore Mutual 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 Gore Mutual Online Quoting feature,

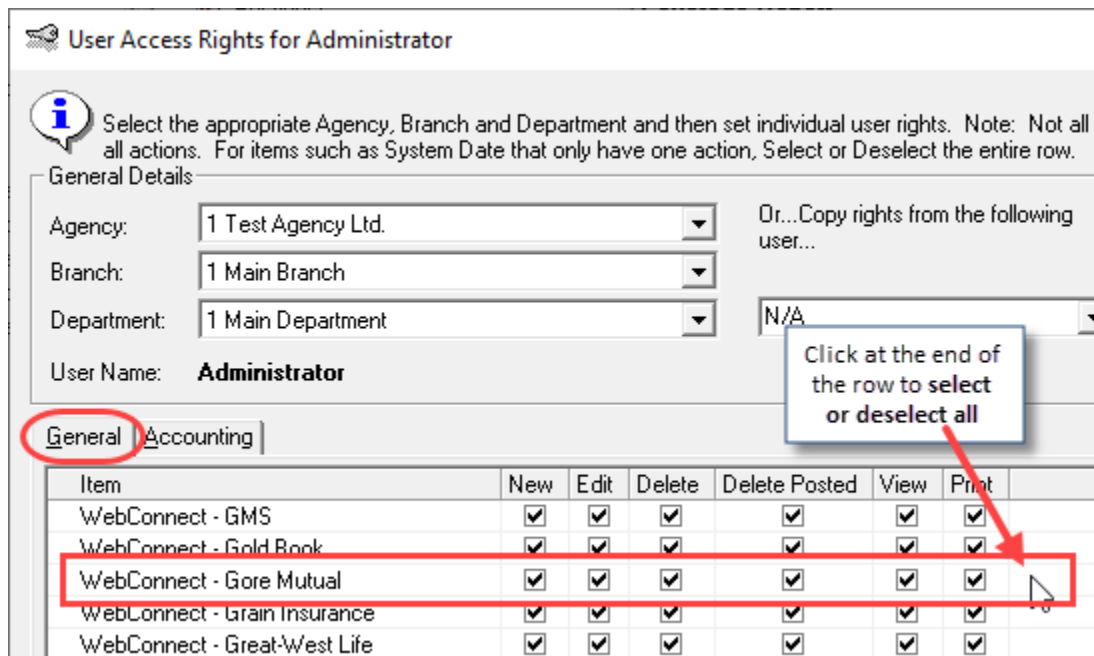
1. Before you begin, please ensure you have the required Gore Mutual User ID/Password for WebConnect setup as described below. Please contact your Business Development Manager at Gore Mutual for assistance if you do not have the required username/password.
2. Confirm that **Broker Numbers** have been set up properly as follows.
 - a. In the TBW window, click **Lists, Insurance Companies**.
 - b. In the **Lists** window, double-click **Gore Mutual**.
 - c. Select the **Company Branch Details** tab and, in the **Broker Numbers** section, verify the following:
 - The applicable broker numbers display for each ABD (Agency, Branch, and Department) in your organization.
 - The appropriate broker number is set as **Default** for use in online rating.
 - Please contact Client Services if you require assistance in setting up broker numbers for Gore Mutual Online Quoting.
 - d. Click **OK** in the Gore Mutual 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 1.6).

(Figure 1.6)



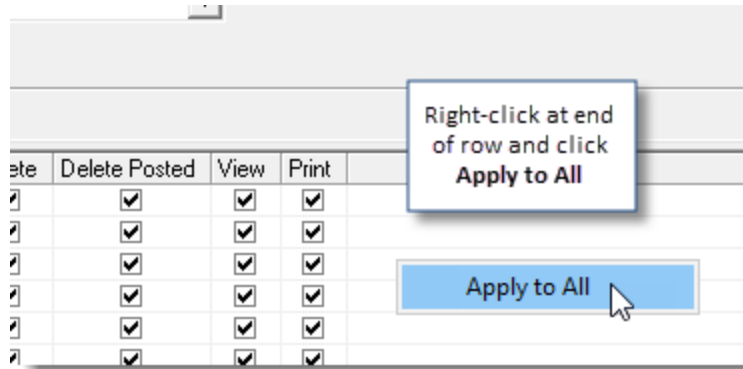
- c. On the **General** tab in the User Access Rights window, select the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Gore Mutual** (see Figure 1.7).

(Figure 1.7)



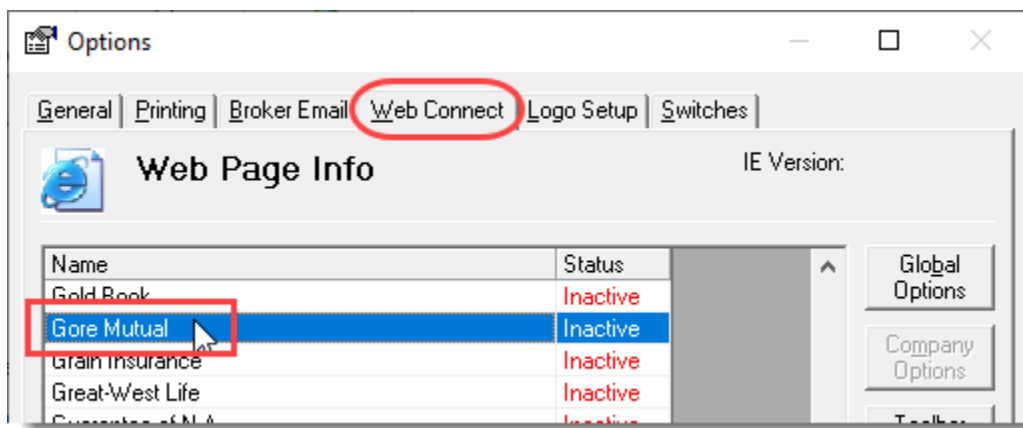
- d. Click **OK** in the User Access Rights window to save these rights for this user for this ABD, and then click **OK** in the Attention pop-up.
- e. If required, repeat steps c – d for additional ABDs for this user, *or*, to apply the selected rights for **WebConnect – Gore Mutual** to **all** ABDs 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.
4. Next, ensure each applicable user is set up for Gore Mutual in **WebConnect**.
- a. Click **Tools, Options** in the TBW window.
 - b. On the **WebConnect** tab in the Options window, double-click **Gore Mutual** (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**.
 - iii. Ensure **Gore Mutual (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 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.
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 Gore Mutual Online Quoting. For questions regarding the feature itself, please contact your Business Development Manager at Gore Mutual 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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