

23 November 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)**:

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[Gore Mutual Online Quoting for Habitational Policies \(ON\)](#) – Effective November 29, brokers who write new business in Ontario with Gore Mutual can access their Online Quoting feature for Personal Lines Property policies. **Please note that there are temporary limitations with this feature described further below.**

Gore Mutual Online Quoting for Habitational Policies (ON)

Important: Current Limitations with Gore Mutual Online Quoting

Although Gore Mutual Online Quoting is available in TBW, there are known limitations with this feature. **Gore Mutual is in the process of addressing these limitations and we will continue to work with them on the resolution.**

Please note the following current limitations of Gore Mutual's direct rating service:

- Water Coverage endorsement may be returned as not eligible if its location is not supported within a given flood zone.
- Primary Condo and Rented Condo will not rate on same quote.
- Premium for scheduled articles can interchange during multiple calculations. The total premium will remain the same.

- When entering "Updated Electrical (%)", "Year electrical system last updated" must be entered as well.
- Building Attachment Type: Duplex and Triplex rating not supported.
- Risk may qualify for Claims Free Discount; however, the discount is not applied to the quote.
- Selecting Local and Monitored Fire Alarm may generate an error during quoting. Please select one but not both.
- Selecting Local and Monitored Burglar Alarm may generate an error during quoting. Please select one but not both.
- A claim with a peril of "Exterior Sewer Line Breakage" is not supported for rating.
- Risks that do not qualify for Multi-Line discount will still show and be reflected in the premium.
- Risks rating \$1,500, \$2,000 deductible is not supported.
- Risks with excess contents and outbuilding will rate only with the base included amount.
- Rented Condo coverage in excess of \$5,000 not supported.
- Risks that do not qualify for the Mortgage Free discount may still be applied to the quote.
- Rating of Loss Assessment on a Condo risk is not supported.
- Risks may qualify for Mutual discount; however, the discount is not applied.

For questions regarding setup for the Gore Mutual Online Quoting feature for personal property, please contact CSSI Client Services at clientservices@cssionline.com or 1-888-291-3588. Please contact Gore Mutual's national contact centre at 1-844-974-4673 (GORE) for any other questions or inquiries regarding the feature.

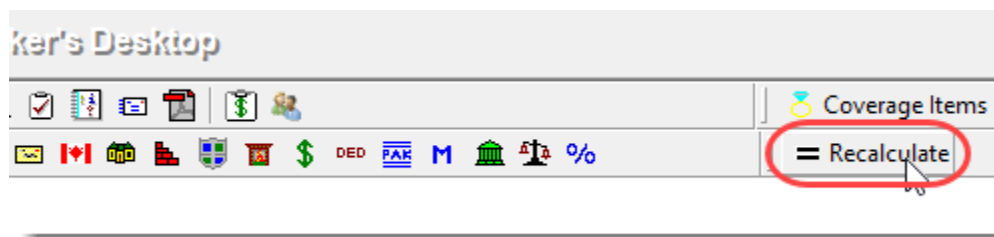
About Gore Mutual Online Quoting

Effective November 29, brokers who write new business in Ontario with Gore Mutual can access their Online Quoting feature for Personal Lines Property policies directly from TBW and IntelliQuote.

When online quoting is fully implemented, Gore Mutual rates for Personal Property policies will always be up-to-date and available to you real-time, 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 Property IQ with a Calculation Date on or after November 29 for new business.

(Figure 1.1)

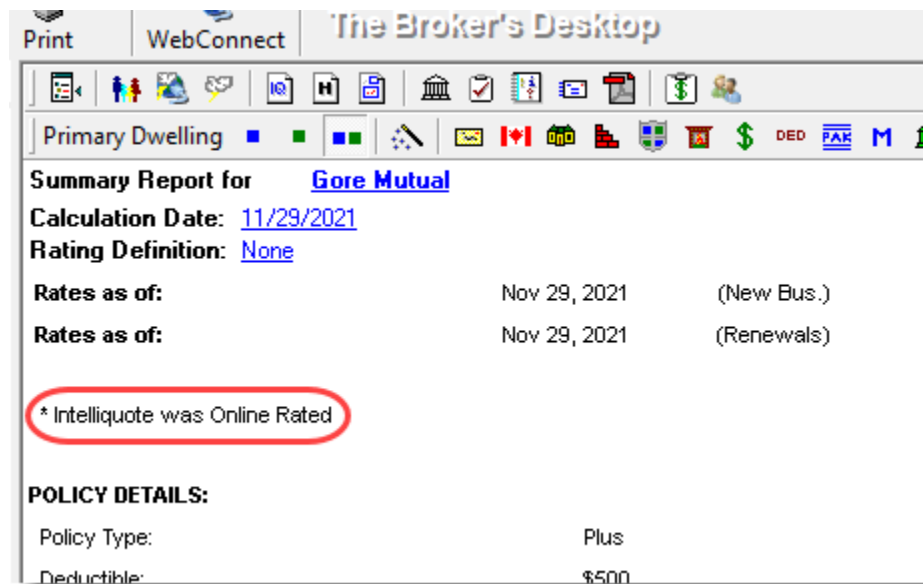


The results of the web service call will be displayed on the Summary Report tab in the IQ, and any alerts that have been returned from the web service will be available on the Alerts tab.

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

- Online quoting will be available for quotes with effective dates of November 29 onwards. Quotes with an effective or calculation date prior to November 29 will be rated as manufactured rating.
- Gore Mutual's online rating is effective for Personal Lines Property policies (including Homeowners, Condo, Tenant, Rented Dwelling, Rented Condo, and Seasonal Dwelling).
- 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 Property 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 Property IQ, please remember the following:

- 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)

Rate Calculation Alerts	
Calculation Date: 11/29/2021	
Rating Definition: None	
Company	Message
Gore Mutual	The insured's current address could not be verified as a valid street address. Please verify that all driver and client folder address information is confirmed valid on the Canada Post website.
Gore Mutual	The company service responded indicating an unknown error at their end. Please contact the company for assistance. Rate calculation was aborted.

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

(Figure 1.4)

Coverage Item Properties - Primary Item

Coverage Limits | Misc. | Discounts/Surcharges | Location

Enter the Location Details for this coverage item here.

Latitude: _____
Longitude: _____

Location Details

Hydrant (within 300m) Yes No

Responding Firehall (within _____m) Yes No

Water Tanker Shuttle Service Yes No

Location Factor for ... Yes No

Chieftain: Territory A1

Dominion: Territory G

Edge Mutual Insurance: Grade 1

Hamilton Township Mutual: Grade 1A

Optimum Insurance: Territory PD

Callout: Location Factor will not show for Gore Mutual online rating

Setup for Gore Mutual Online Quoting

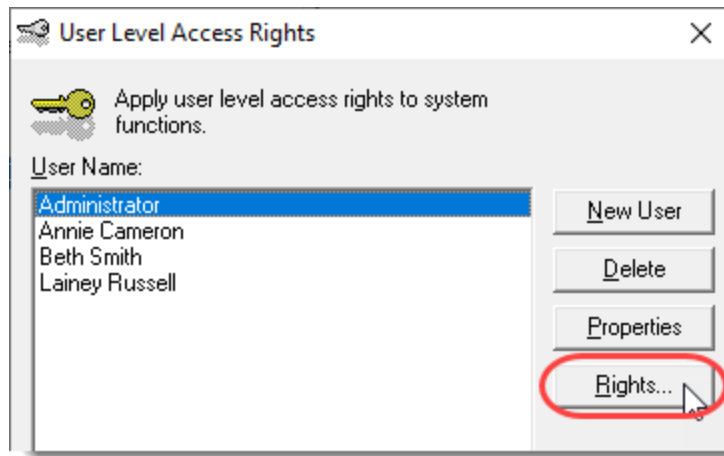
The following one-time setup for Gore Mutual Online Quoting must be completed in TBW before the feature can be used.

****Important:** *Users may have already 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 have already been set up).***

To set up the Gore Mutual Online Quoting feature,

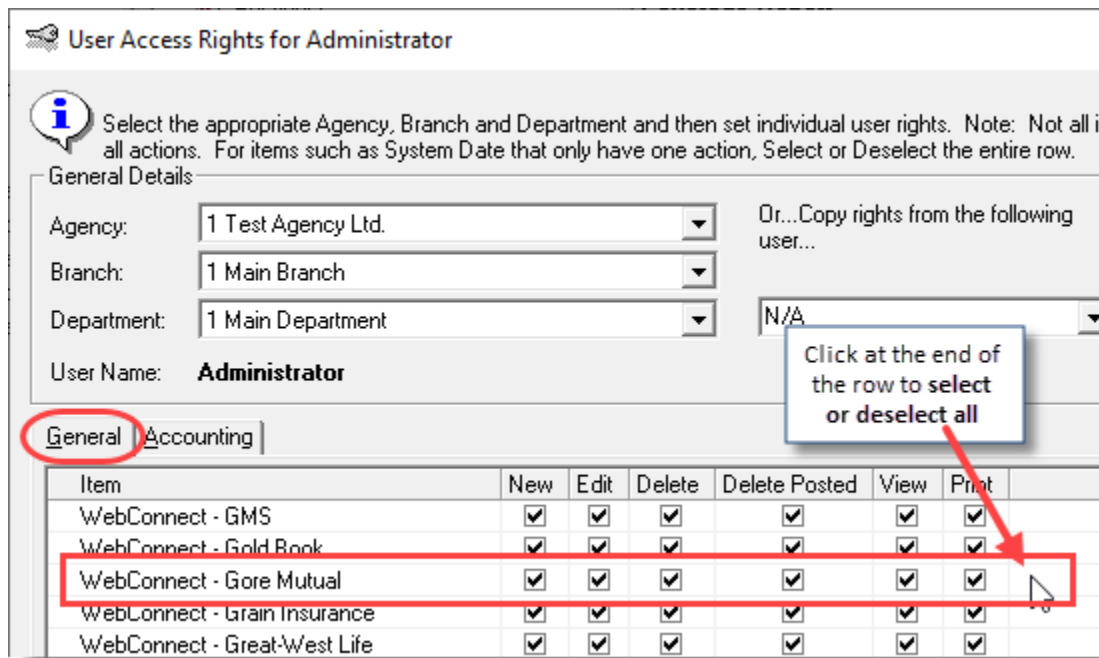
1. Please ensure CSSI Client Services has added the required switch to your system.
2. Before you begin, please ensure you have the required Gore Mutual User ID/Password for WebConnect setup as described below. Please contact your Business Development Manager at Gore Mutual for assistance if you do not have the required username/password.
3. 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.
4. 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 1.5).

(Figure 1.5)



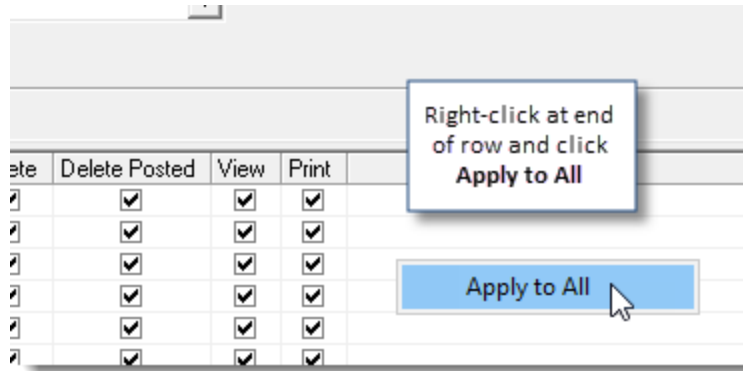
- c. On the **General** tab in the User Access Rights window, select the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Gore Mutual** (see Figure 1.6).

(Figure 1.6)



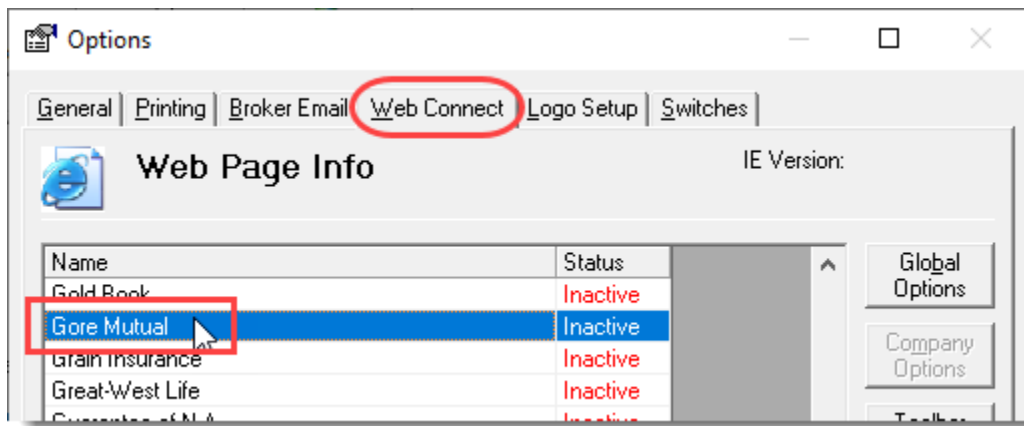
- d. Click **OK** in the User Access Rights window to save these rights for this user for this ABD, and then click **OK** in the Attention pop-up.
- e. If required, repeat steps c – d for additional ABDs for this user, *or*, to apply the selected rights for **WebConnect – Gore Mutual** to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** (see Figure 1.7).

(Figure 1.7)



- 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.
5. 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 1.8).

(Figure 1.8)



- 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 1.9).

(Figure 1.9)

- 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.
6. Close TBW, run the TBW Update Utility, and then reopen the program.

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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 Application Development
Silver DevOps
Silver Application Integration

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