



22 January 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*

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1. [Wawanesa Online Quoting for Auto Policies \(NB, NS, PEI\)](#) – Available January 25, 2021, brokers in New Brunswick, Nova Scotia, and Prince Edward Island who write business with Wawanesa Insurance can access Online Quoting directly from TBW and IntelliQuote for new business Personal Lines Auto policies.

## 1. Wawanesa Online Quoting for Auto Policies (NB, NS, PEI)

Available January 25, 2021, brokers in New Brunswick, Nova Scotia, and Prince Edward Island who write business with Wawanesa Insurance can access Online Quoting 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.

**Please note:** While Wawanesa Online Quoting for Auto policies is now available, Realtime Upload for New Business and Policy Change is not yet available for Wawanesa Auto policies in these provinces. As you know, Wawanesa is continuing the rollout of their new policy administration system, the Guidewire InsuranceSuite™, and is currently working with Custom Software Solutions

Inc. (CSSI) to deliver Realtime efficiencies with our I-Company BMS integration software into the new system.

- Please contact your Wawanesa Personal Lines representative for more information regarding these changes.

For the new Wawanesa Online Quoting feature, **please ensure you have confirmed and, if required, updated your Wawanesa credentials as outlined below.** Please also ensure the one-time setup for this feature has been completed in TBW.

When the setup for the Wawanesa Online Quoting feature 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 Auto IQ.

(Figure 1.1)



The results of the web service call will display immediately on the **Summary Report** tab in the IntelliQuote, and any alerts that have been returned from the web service will display on the **Alerts** tab.

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

- **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.
- Please note, you cannot recalculate an in-force policy. If there is an existing policy for the same risk under the same account, an Alert message will display, stating "We noticed an existing policy for the same risk. Please contact an underwriter."
- 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.
- Overrides are not enabled for Wawanesa Online Quoting.
- Credit Score consent details can be entered in the usual way while a Wawanesa IQ is being created or modified. However, the IQ Summary Report will not indicate whether a credit score was performed. If the insured qualifies for a credit score discount, the premium will be adjusted accordingly.

## Setup for Wawanesa Online Quoting

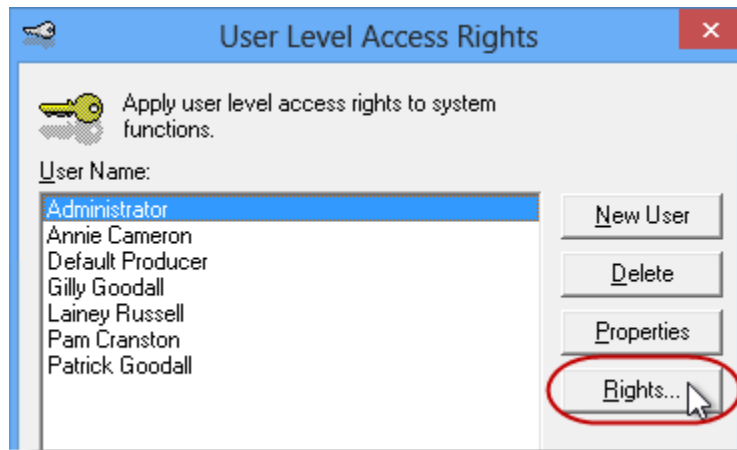
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The following one-time setup for Wawanesa Online Quoting must be completed in TBW before the functionality can be used.

*\*\*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).\*\**

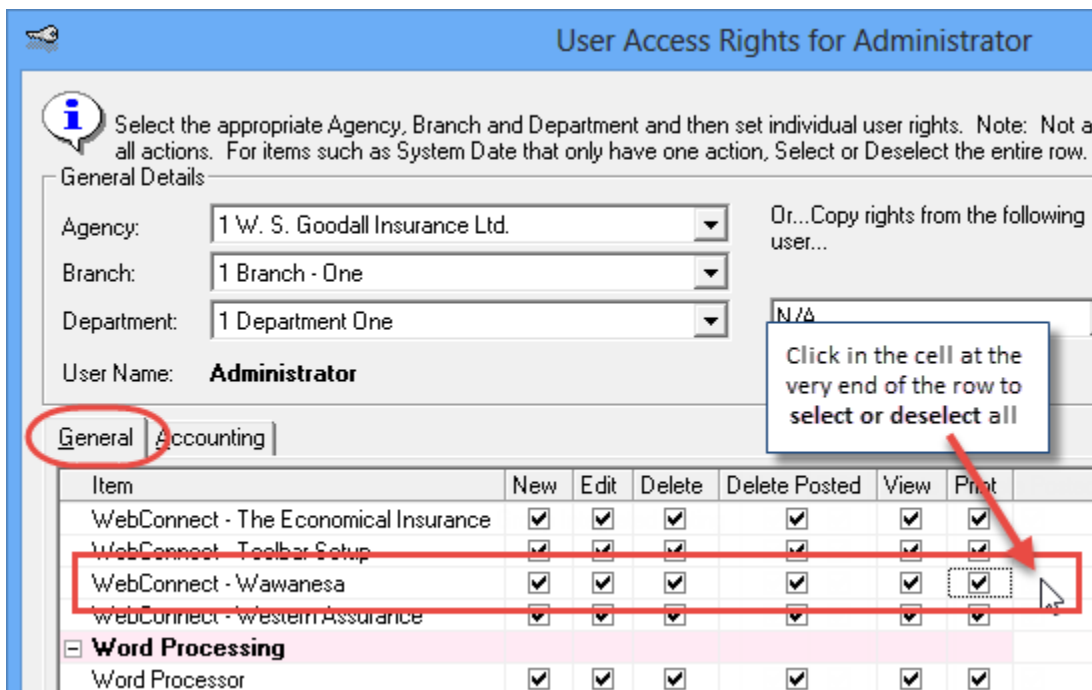
1. Before you begin, please ensure you have the required Wawanesa User ID/Password for WebConnect setup as described below. Please contact your Wawanesa Personal Lines representative for assistance if you do not have the required username/password.
2. Confirm that **Broker Numbers** have been set up properly as follows.
  - a. In the TBW window, click **Lists, Insurance Companies**.
  - b. In the **Lists** window, double-click **Wawanesa**.
  - c. 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) 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.
    - 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.
    - Please contact Client Services if you require assistance in setting up broker numbers for Wawanesa Online Quoting.
  - d. Click **OK** in the Wawanesa dialog and click **OK** in the Lists dialog.
3. Ensure appropriate **User Rights** for this feature are set up for applicable TBW users.
  - a. Click **Tools, Administrative, User Manager**.
  - b. In the User Level Access Rights window, select the **Username** and then click the **Rights** button (see Figure 1.2).

(Figure 1.2)



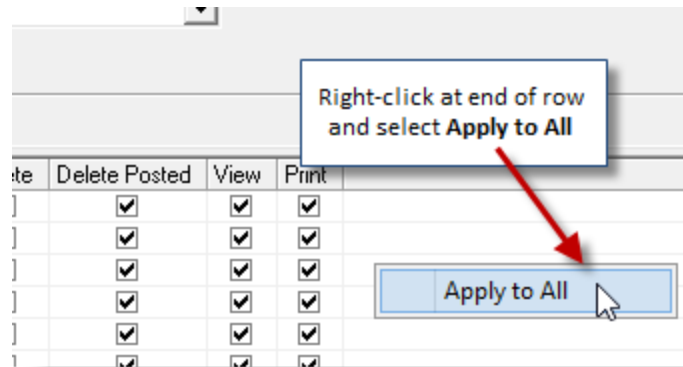
- c. On the **General** tab in the User Access Rights window, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Wawanesa** (see Figure 1.3).

(Figure 1.3)



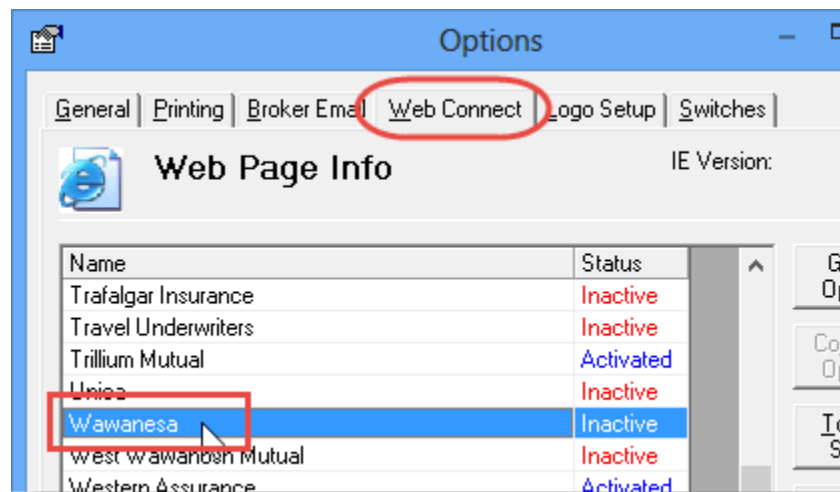
- d. Click **OK** in the User Access Rights window to save these rights for this user for this ABD, and then click **OK** in the Attention pop-up.
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for **WebConnect – Wawanesa** to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.4).

(Figure 1.4)



- 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 Wawanesa 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 **Wawanesa** (see Figure 1.5).

(Figure 1.5)



- 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 1.6).

(Figure 1.6)

- 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 dialog.
    - 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 your Wawanesa Personal Lines Representative for assistance with questions regarding this feature. For questions you have about setup for Wawanesa Online Quoting, please contact our Client Services Team at [clientservices@cssionline.com](mailto:clientservices@cssionline.com) (email) or 1-888-291-3588 (toll-free telephone).

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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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