

11 January 2022

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) and Intact Insurance are 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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[Broker Number Required for Intact Online Quoting \(ON\)](#) – Effective January 1, 2022, broker numbers must be provided with all Intact Realtime quote requests. This will happen automatically in IntelliQuote when applicable broker number(s) have been set up in TBW Lists.

Broker Number Required for Intact Online Quoting (ON)

For brokers who write business in Ontario with Intact Insurance, brokers numbers must be provided with all Intact Realtime quote requests, effective January 1, 2022. This is applicable for new business Personal Lines Habitational and Auto policies.

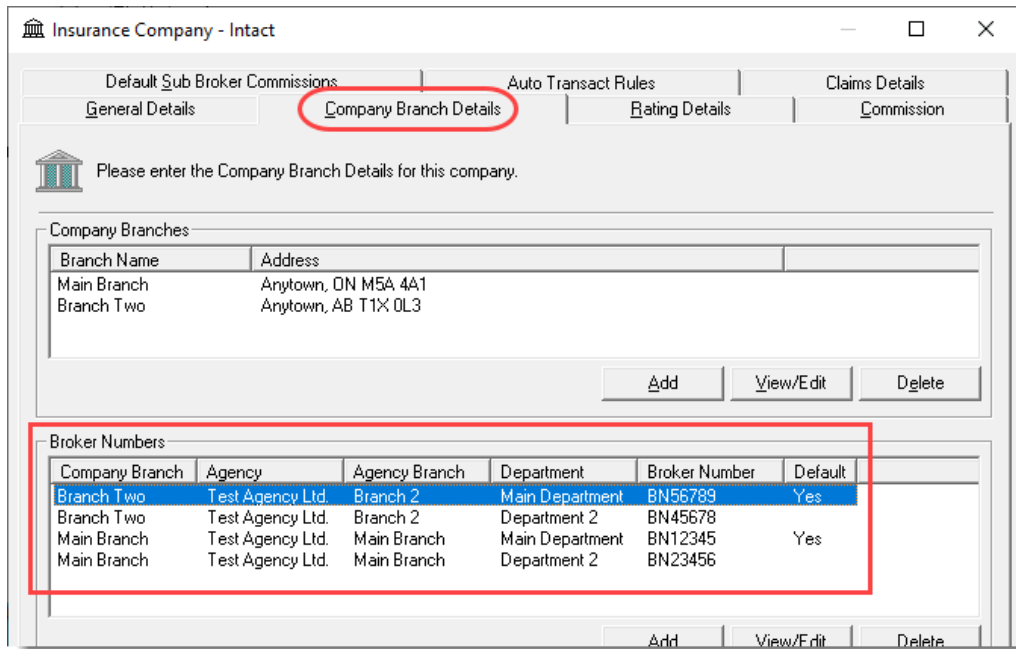
Broker numbers that have been set up in TBW Lists will be sent automatically with quote requests in IntelliQuote. There is no change to the user workflow with this enhancement, and you can continue to create and edit Property and Auto IQs in the usual way.

Broker numbers should already have been added in your system; however, **please confirm applicable broker number(s) have been added in TBW Lists** as follows:

1. In the TBW window, click **Lists, Insurance Companies**.
2. In the list of companies, double-click **Intact**.

3. Select the **Company Branch Details** tab and, in the **Broker Numbers** section, verify the following:
 - The applicable broker number displays for each ABD (Agency-Branch-Department) in your organization.
 - The broker number used for Online Quoting has been set as Default.

If applicable broker number(s) have not been set up, they must be added. To ensure broker numbers are set up properly, **please contact Client Services for assistance with adding or editing broker numbers.**



Please note, if the appropriate broker number is not set up in TBW Lists, the quote will not rate, and you will receive an Alert message.

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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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