

21 April 2023

Dear Valued Client:

## Re: Important Releases and Changes for The Broker's Workstation

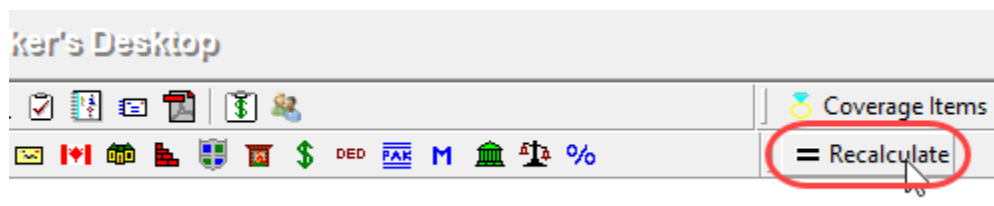
Custom Software Solutions Inc. (CSSI) and Intact Insurance are pleased to announce the release of the following enhancements and new features to **The Broker's Workstation (TBW)**:

### Intact Online Quoting for Habitational Policies (BC)

Brokers who write business in British Columbia with Intact Insurance can now access the Online Quoting feature directly from TBW and IntelliQuote for new business Personal Lines Property policies. Online quoting is available as of April 1, 2023.

What this will mean for you, the broker, is that Intact rates for Habitational policies will always be up to date and available to you realtime, because the rates will come directly and immediately from Intact'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, Intact's web service will automatically be called whenever you click the **Recalculate** button on the IQ toolbar with a Calculation Date on or after April 1.



The results of the web service call will be displayed immediately on the **Summary Report** tab. Use of online rating will be indicated in the IQ.



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

Here are a few points to keep in mind when you are using the Intact Online Quoting feature:

- Online quoting is available as of April 1, 2023. Quotes with an effective or calculation date prior to April 1 will be rated as manufactured rating.
- Online quoting is available for new business habitational policies; however, online quoting is not supported for renewal quoting at this time.
- Trailers and boat and motor will continue to rate as manufactured rating.

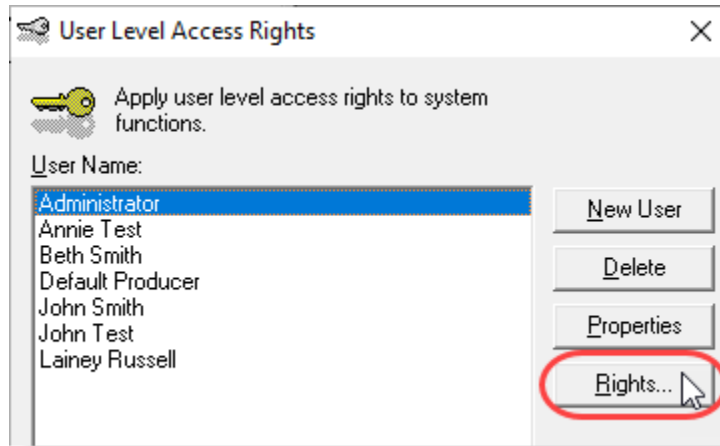
## Setup for Intact Online Quoting

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

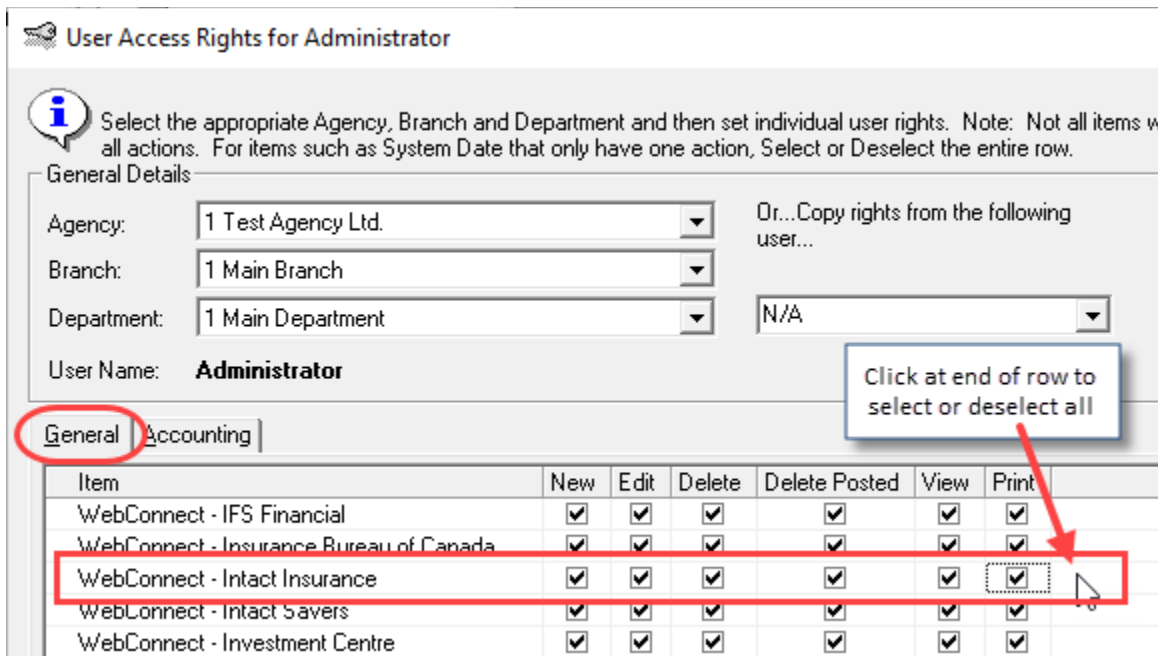
**\*\*Important:** *Users may already have completed the following setup for User Rights and WebConnect. In this situation, these steps will only need to be completed for new users or if your office has never used any Intact WebConnect functions. Broker Number setup is also required, but these should already have been added in your system.\*\**

To set up the Intact Online Quoting feature,

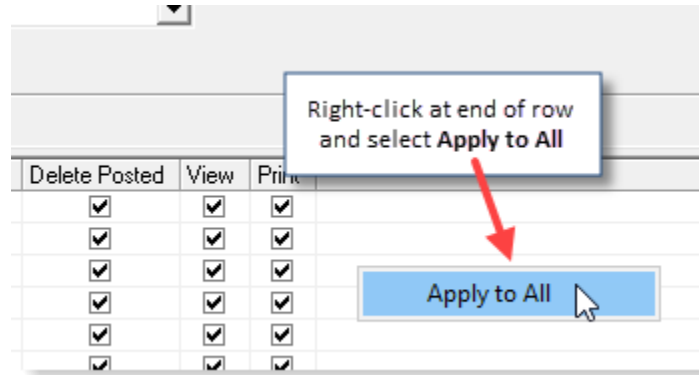
1. Before you begin, please ensure you have the required Intact User ID/Password for WebConnect setup as described below. Please contact your Intact Personal Lines representative for assistance if you do not have the required username/password.
2. Confirm applicable **Broker Number(s)** have been added in TBW Lists.
  - a. In the TBW window, click **Lists, Insurance Companies**.
  - b. In the list of companies, double-click **Intact**.
  - c. Select the **Company Branch Details** tab. 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.
    - **Note:** 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**.
  - d. Click **OK** in the Company 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.



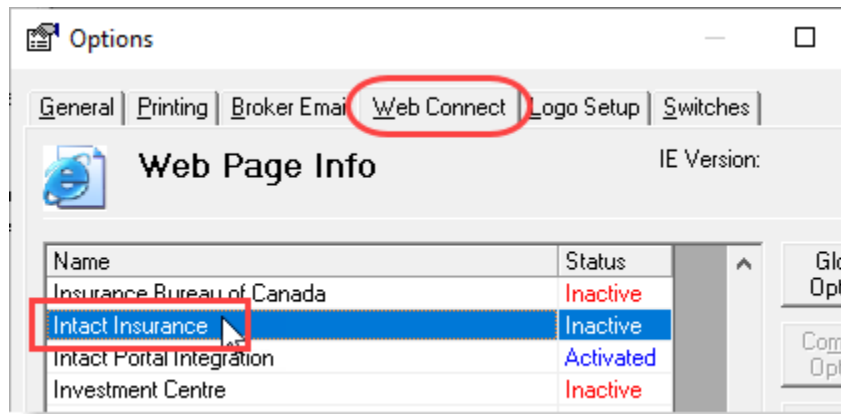
- c. On the **General** tab in the User Access Rights window, select the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Intact Insurance**.



- 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 – Intact Insurance to **all** ABDs for this user, right-click at the end of the row and click **Apply to All**.



- 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 Intact in **WebConnect**.
- a. Click **Tools, Options** in the TBW window.
  - b. On the **WebConnect** tab in the Options window, double-click **Intact Insurance**.



- c. In the **WebConnect Setup** window,
  - i. Select the applicable **User**.
  - ii. Select **All** or the applicable **Agency/Branch/Department**.
  - iii. Ensure **Intact Insurance (All)** is selected in the Site menu.
  - iv. Enter the appropriate **Username** and **Password**.
  - v. Click **Save**.

- 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 share this information with the appropriate TBW 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) or 1-888-291-3588 (toll-free telephone).

Thank you for using The Broker's Workstation.

Yours sincerely,

Custom Software Solutions Inc.