

TBW – Important Releases and Changes

Dear Valued Client :

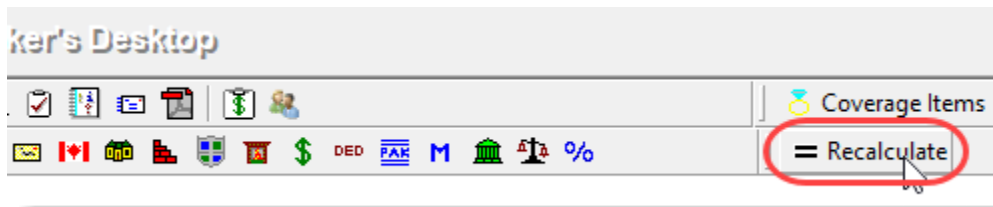
Rival Insurance Technology and Intact Insurance are pleased to announce the release of the following enhancements and new features to TBW:

Intact Online Quoting for Habitational Policies (MB)

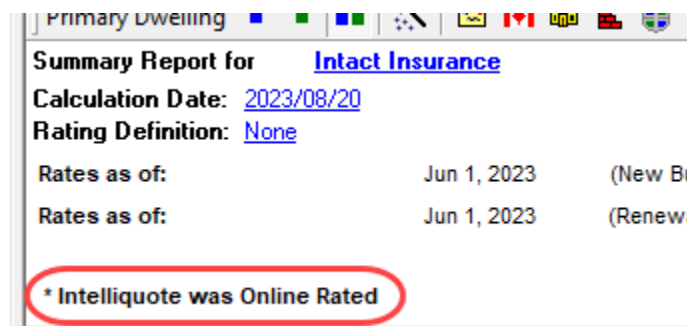
Brokers who write business in Manitoba with Intact Insurance can now access the Online Quoting feature directly from TBW and IntelliQuote for new business Personal Lines Property policies. Online quoting is available as of September 11, 2023.

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 September 11.



The results of the web service call will display 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 show on the **Alerts** tab.

Here are a few points to keep in mind with Intact Online Quoting:

- Online quoting is available as of September 11, 2023. Quotes with a calculation date prior to September 11 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.

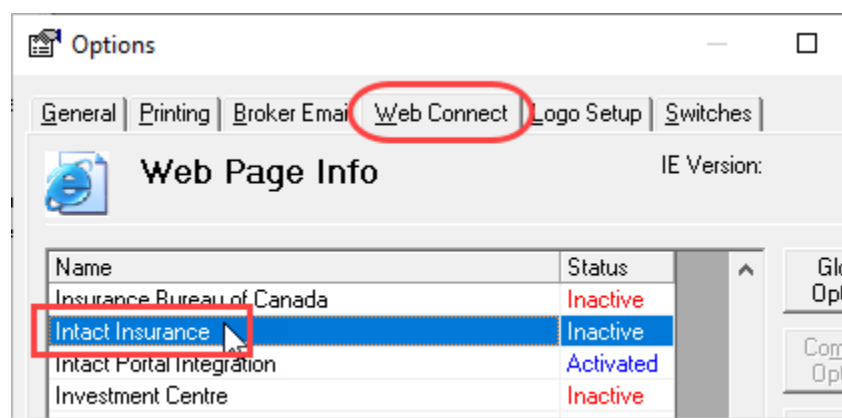
Setup for Intact Online Quoting

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 setup for 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 this 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 appropriate 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 broker numbers 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. Ensure each applicable user is set up for Intact in **WebConnect**.
 - a. Click **Tools, Options**.
 - 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**.

The screenshot shows a 'Web Connect Setup' window for 'Intact Insurance'. It features several dropdown menus for 'User' (Administrator), 'Agency' (All), 'Branch' (All), 'Department' (All), and 'Site' (Intact Insurance (All)). A text field for 'URL' contains 'http://www.intact.ca/home'. Below these are text fields for 'Username' (testuser) and 'Password' (masked with asterisks). To the right of the Password field are 'Delete' and 'Save' buttons. At the bottom right is a 'Close' button.

- vi. Click **OK** in the Save Username/Password pop-up.
 - vii. Repeat these steps as needed 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.
4. 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). If you have any questions about this feature, please contact our Client Services Team at clientservices@rivalit.com or 1-888-291-3588 (toll-free telephone).

Thank you for using TBW.

Yours sincerely,

Rival Insurance Technology

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