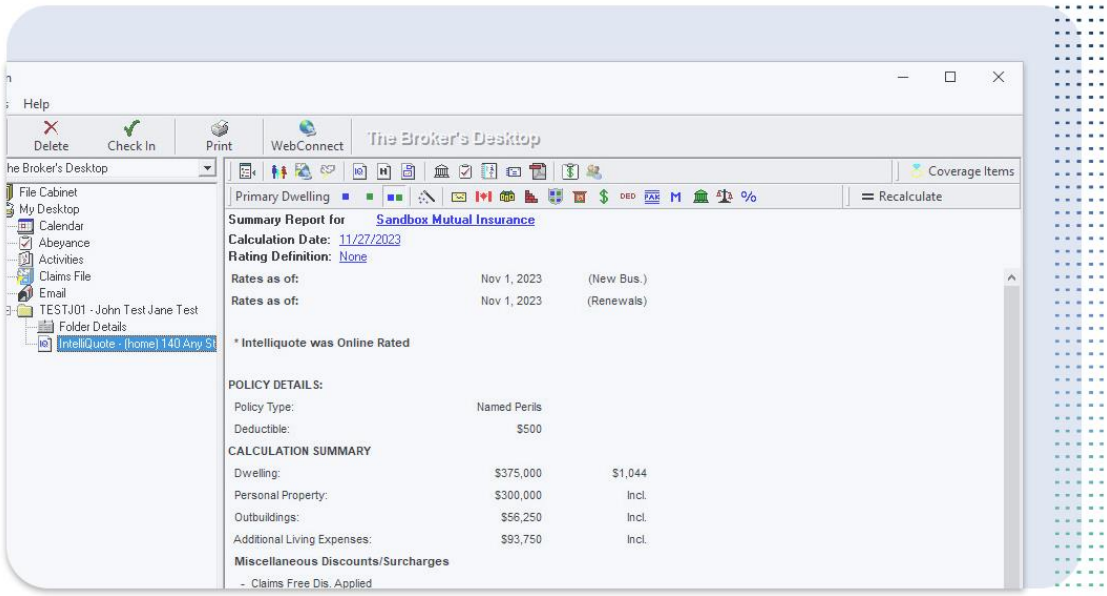
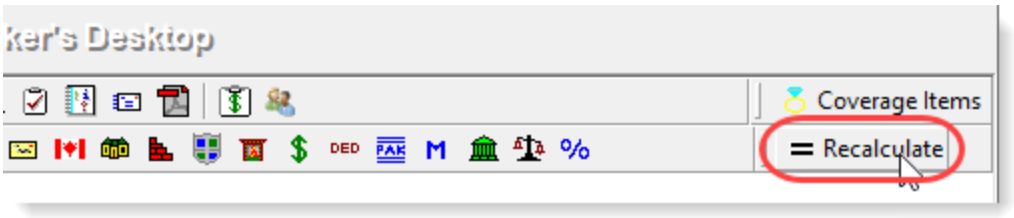
TBW Feature Release: Sandbox Online Quoting Allows Alberta Brokers To Do Business More Efficiently

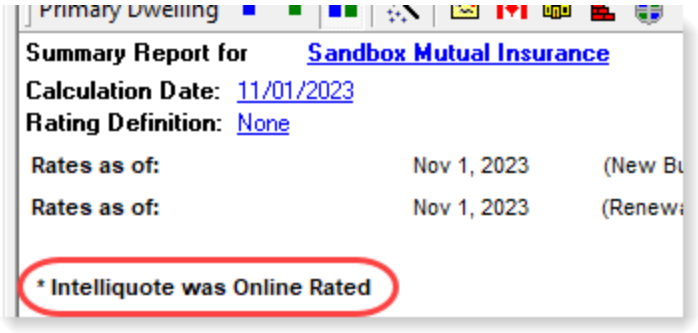


Online Quoting for Sandbox means their rates are always up to date and available to you realtime, so you can do business more efficiently and responsively.

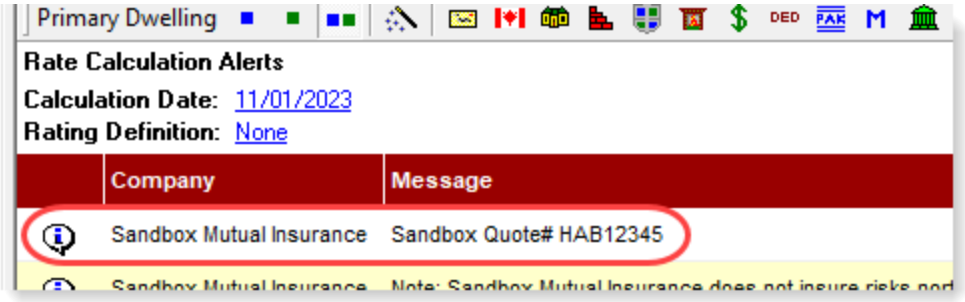
With online quoting, Sandbox rates come directly from their system through a web call. Once the simple setup has been completed, their web service will automatically be called whenever you click the **Recalculate** button in a Sandbox Property IQ.



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 returned from the web service will show on the Alerts tab. For an online-rated quote, the quote reference number will also be provided on the Alerts tab ("Sandbox Quote# HABxxx").



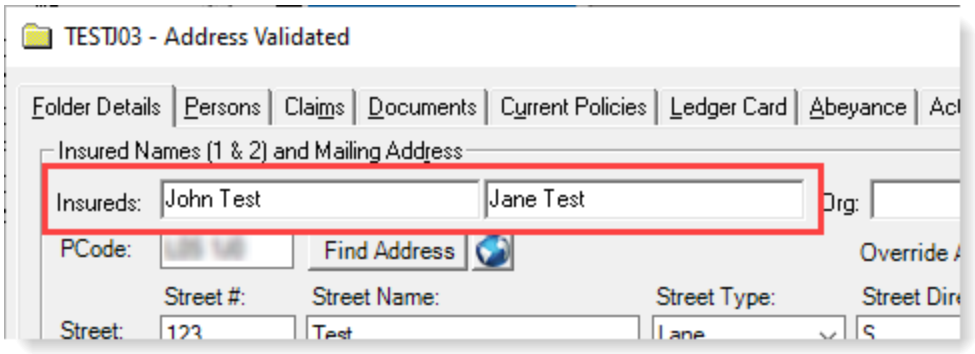
Here are a few points to keep in mind with Sandbox Online Quoting:

- Online quoting is available for new business Personal Lines Property policies but is not currently supported for renewal quoting.
- Online quoting is available as of November 1, 2023. Quotes with a calculation date prior to November 1 will be rated as manufactured rating.
- Online quoting is available for Primary Homeowners, Primary Condo, Add-On Rented Condo, Primary Tenant, FEC, Add-On Rented Dwelling, Standalone Seasonal Dwelling, and Add-On Seasonal Dwelling policy types.
- Farm and Mobile Home policies will be rated as manufactured rating.
  - Please note that rating is not supported for a Farm or Mobile Home policy with an online-rated secondary dwelling.

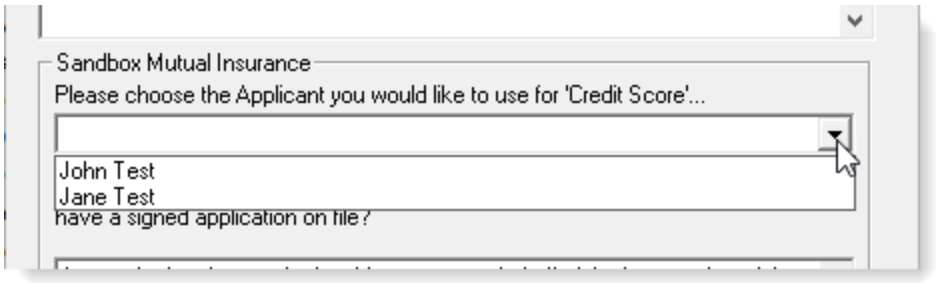
Credit Score Consent with Sandbox Online Quoting

Credit score consent can be submitted in the usual way. However, Sandbox's direct rating service has a requirement in regard to credit score: **Credit score consent can only be submitted for the primary named insured** (the person in the first Insureds field in Folder Details).

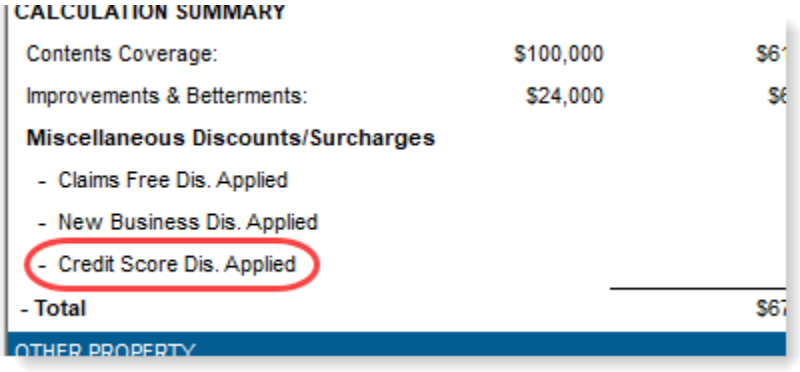
If there are two named insureds on the quote and you would like to use the secondary named insured for credit score, **please switch the names in Folder Details** (making the second named insured the first named insured).



After recalculating the IntelliQuote, complete the Credit Score form, ensuring the applicable Applicant is selected. Click the Submit button to send the information to the company.



When credit score consent has been submitted, no client credit information will display in the Summary Report. However, when applicable, the Credit Score Discount will be listed under Miscellaneous Discounts/Surcharges.



Setup for Sandbox Online Quoting

Broker Number setup is required for Sandbox Online Quoting, but broker numbers in many cases may already have been added in your system.

Please confirm applicable Broker Number(s) have been added in TBW Lists as follows:

1. Click **Lists**, **Insurance Companies**.
2. In the list of companies, double-click **Sandbox**.

3. Select the **Company Branch Details** tab. In the **Broker Numbers** section, verify the following:
   - The appropriate broker number displays for each 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. **Please contact Client Services for help with adding or editing broker numbers** to ensure they are set up properly.
4. Click OK in the Company window and click OK in the Lists window.

Please share this information with the appropriate TBW users in your office(s). If you have any questions, please contact our Client Services Team at support@zendesk.rivalit.com or 1-888-840-3493 (toll-free).

Yours sincerely,

Rival Insurance Technology