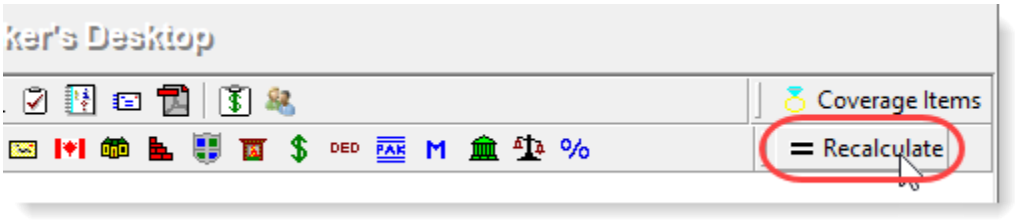
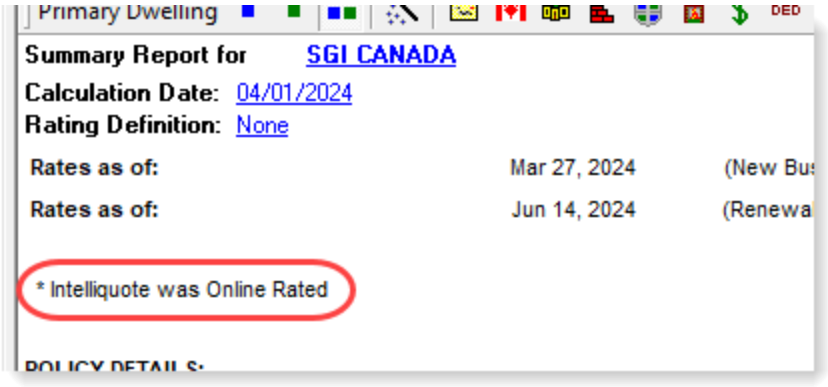
TBW Feature Release: Alberta Brokers to Enjoy Enhanced Quoting Capabilities with SGI CANADA Online Quoting Integration

This enhancement ensures rates for Habitational and Auto policies are always up to date and available in realtime, saving you time and allowing you to better serve your customers.

With online quoting, SGI CANADA 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 Property or Auto IQ with a calculation date on or after March 27, 2024.



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 display ("SGI CANADA - Here is your quote number: xxxxxx"). A link to the quote in Guidewire will be provided, as well. Click this link if you want to navigate directly to the quote in Guidewire and view quote details.

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

- Online quoting is available for new business Personal Lines Property and Personal Lines Auto policies. Online quoting is not currently supported for renewal quoting.
- Online quoting is available for quotes with a calculation date on or after March 27. Quotes with a calculation date prior to March 27 will be rated as Ratebridge or manufactured rating.
- For Farm policies, PAK Coverages will continue to rate as Ratebridge rating, and Non-PAK Coverages will continue to rate as manufactured rating.
- For Auto policies: Commercial Auto and Commercial Trailers will continue to be quoted using manufactured rating – please review quote messaging as split policies may need to have personal and commercial vehicles quoted separately.
- When credit score consent has been submitted, no client credit information will display in the Summary Report. However, the Credit Score Discount will be listed under Miscellaneous Discounts/Surcharges when applicable.

Setup for SGI CANADA Online Quoting

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

Please have the Brokerage Administrator 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 **SGI CANADA**.
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.
   - Applicable existing broker numbers (not new broker numbers) have 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).

Thank you for using TBW.

Yours sincerely,

Rival Insurance Technology