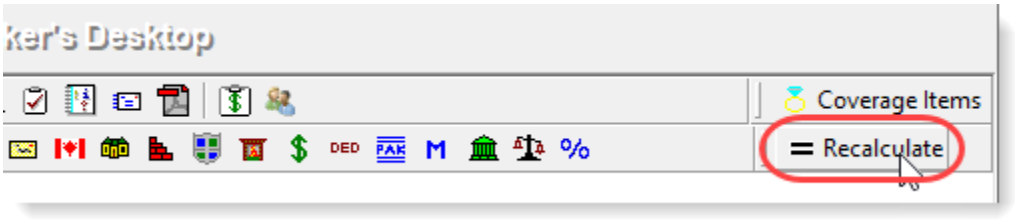
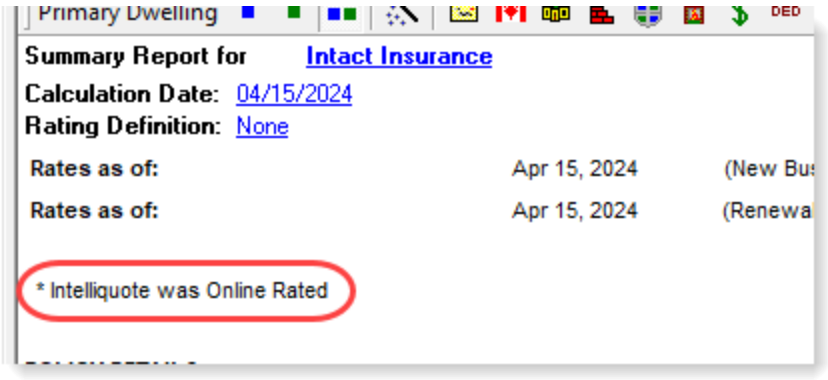
TBW Feature Release: Intact Online Quoting Provides Brokers in the Maritimes With Enhanced Quoting Capabilities

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

With online quoting, Intact 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 IQ with a calculation date on or after April 15, 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 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 for new business Personal Lines Property policies in New Brunswick, Nova Scotia, and Prince Edward Island. Online quoting is not currently supported for renewal quoting.
- Online quoting is available for quotes with a calculation date on or after April 15. Quotes with a calculation date prior to April 15 will be rated as manufactured rating.
- Boat and Motor, Jet Ski, and Trailer (Boat and Holiday) will continue to rate as manufactured rating.

Setup for Intact Online Quoting

The following one-time setup for Intact Online Quoting must be completed 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 broker numbers in many cases may already have been added in your system.

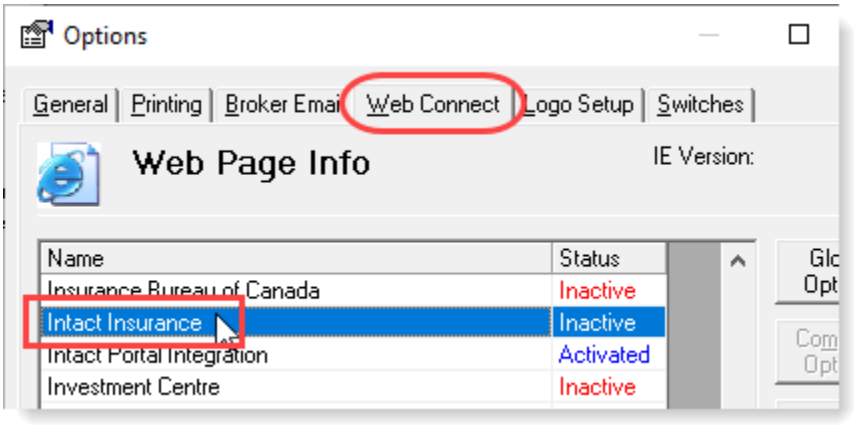
To set up the Intact Online Quoting feature,

1. Before you begin, please ensure you have the Intact User ID/Password required 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 **Broker Number(s)** have been added in TBW Lists.
   a. 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 Agency-Branch-Department in your organization.
      - The broker number used for Online Quoting has been set as Default.

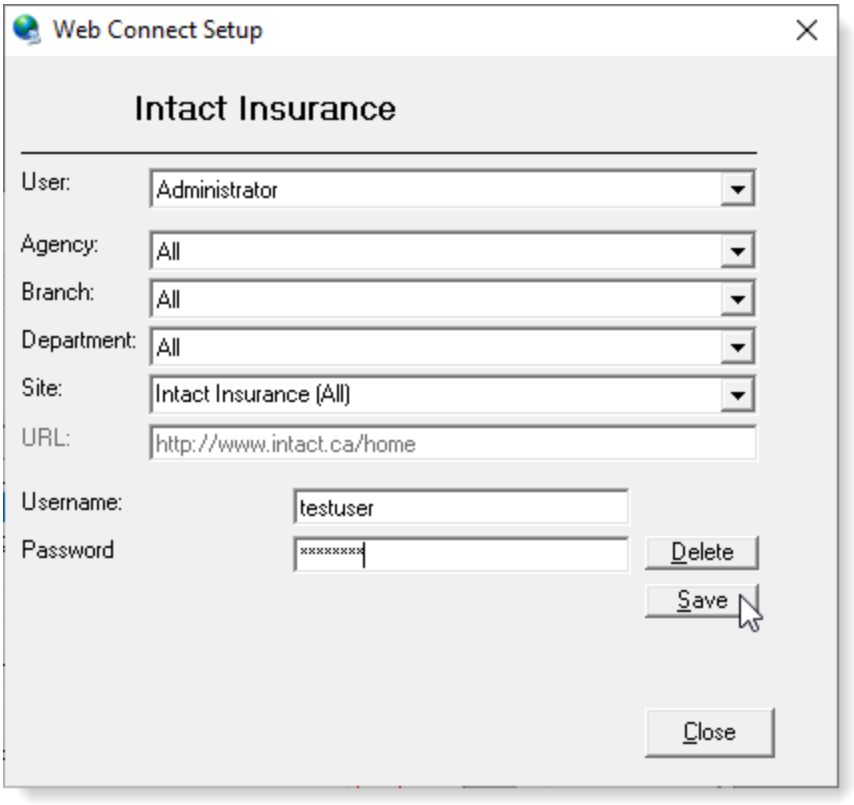
- **Note**: If broker numbers have not been set up, they must be added. **Please contact Client Services for help with adding or editing broker numbers** to ensure they are set up properly.

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, double-click **Intact Insurance**.



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



vi. Click **OK** in the Save Username/Password pop-up.

vii. Repeat these steps as needed for other ABDs and/or users.

viii. Click **Close** in the WebConnect Setup window.

- *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, 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