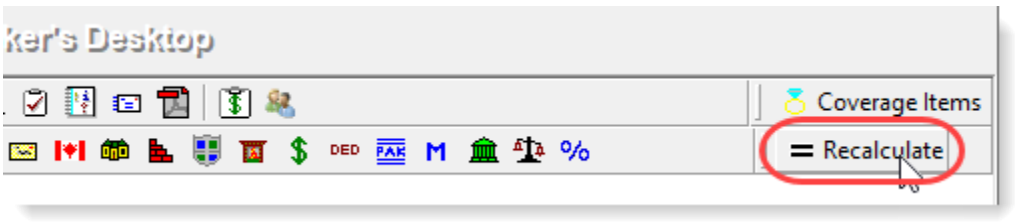
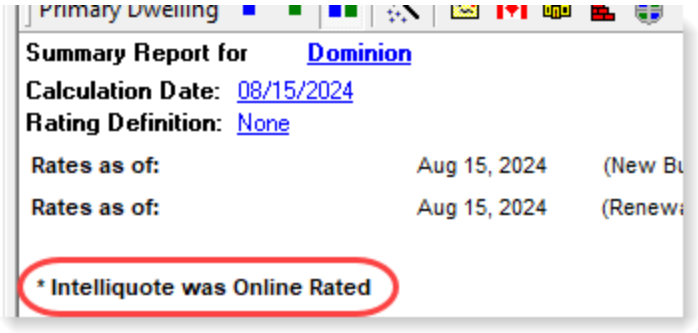
TBW Feature Release: Travelers Online Quoting Provides Ontario Brokers With Enhanced Quoting Capabilities

While brokers have always enjoyed accurate rating through TBW, the feature enhancement ensures and improves speed and accuracy for Habitational policy quoting, saving you time and allowing you to better serve your customers.

With online quoting, Travelers 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 August 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 some points to keep in mind with Travelers 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 for quotes with a calculation date on or after August 15. Quotes with a calculation date prior to August 15 will be rated as manufactured rating.

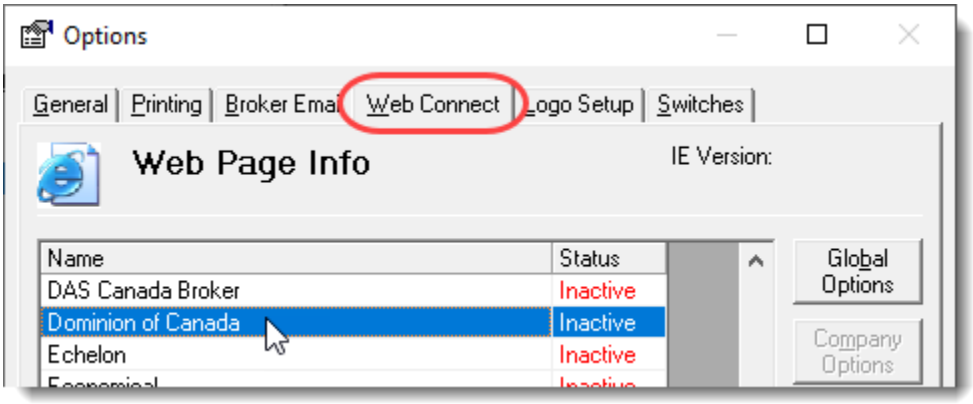
Setup for Travelers Online Quoting

The following setup must be completed in TBW before the Travelers Online Quoting feature can be used.

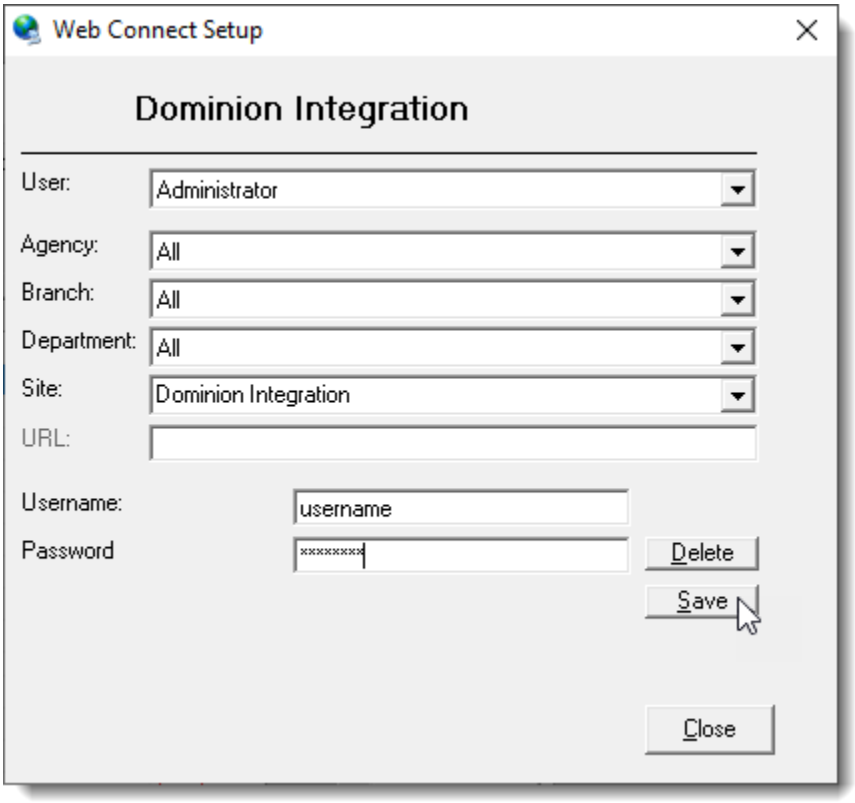
Note: Users may already have completed WebConnect setup as described below. If so, these steps will only be needed for new users or if your office has never used any Dominion WebConnect functions.

To set up the Travelers Online Quoting feature,

1. Before you begin, ensure you have the required Travelers User ID/Password for WebConnect setup. If you require a User ID and Password, please contact your Travelers Personal Lines representative for assistance.
2. Set up applicable TBW users for WebConnect as follows.
   a. Click **Tools**, **Options**.
   b. On the WebConnect tab, double-click **Dominion of Canada**.



c. In the WebConnect Setup window,
   i. Select the **User**.
   ii. Select **All** or the applicable **ABD** (Agency, Branch, and Department**)**.
   iii. Select **Dominion Integration** 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.

3. 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 by Chat (https://supportdesk.rivalit.com/) or Email (support@zendesk.rivalit.com).

Yours sincerely,

Rival Insurance Technology