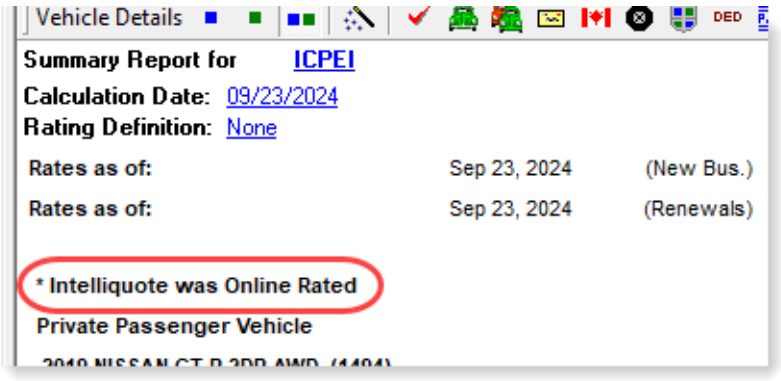
TBW Feature Release: New Brunswick Brokers to Enjoy Enhanced Quoting Capabilities with ICPEI Online Quoting Integration

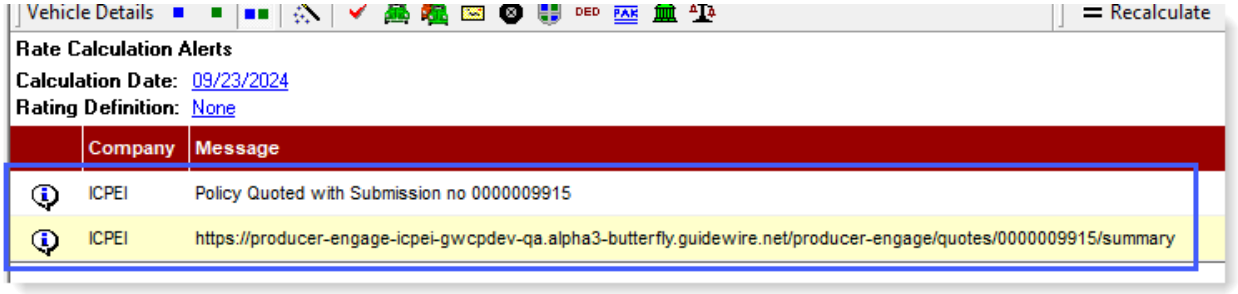
While brokers have always enjoyed accurate rating through TBW, the feature enhancement ensures and improves speed and accuracy for Auto policy quoting, saving you time and allowing you to better serve your customers.

With online quoting, ICPEI 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 an Auto IQ with a calculation date on or after September 23, 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.

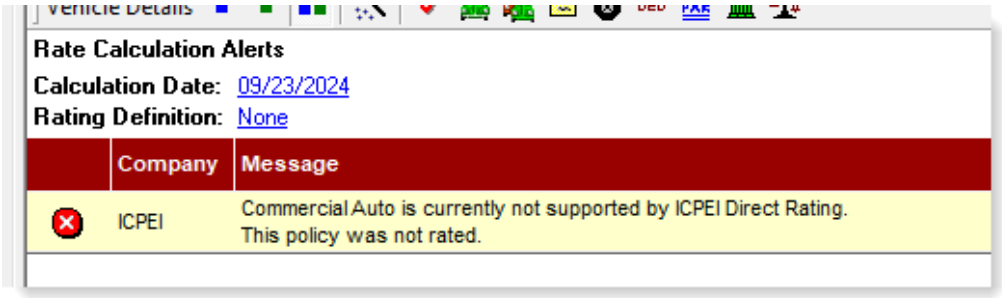


Any alerts returned from the web service will show on the Alerts tab. For an online-rated quote, the quote reference number will also display ("ICPEI – Policy Quoted with Submission no xxxxxx"). A link to the quote in Guidewire will be provided, as well. Click this link if you want to navigate directly to the quote in Guidewire and view quote details.



Here are some points to keep in mind with ICPEI Online Quoting:

- Online quoting is available for new business Personal Lines Auto policies but is not currently supported for renewal quoting.
- Online quoting is available for quotes with a calculation date on or after September 23. Quotes with a calculation date prior to September 23 will be rated as manufactured rating.
- Online quoting is supported for the following vehicle types: Private Passenger Vehicle, ATV, Moped, Motor Home, Motorcycle, Snowmobile, and Trailer.
- Commercial Auto, which is currently not supported by ICPEI Direct Rating, will return a Not Rated Alert.



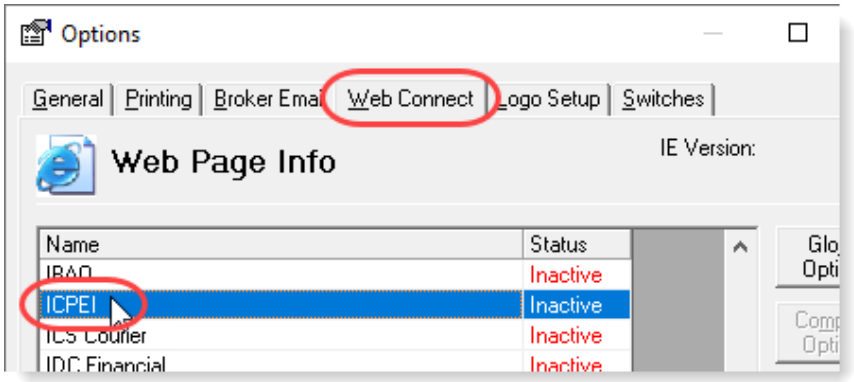
Setup for ICPEI Online Quoting

Before ICPEI Online Quoting can be used, the following setup must be completed in TBW.

Note: Users may already have completed WebConnect setup as described below. If so, this step will only be needed for new users or if your office has never used any ICPEI WebConnect functions. Broker Number setup is also required, but broker numbers may already have been added in your system.

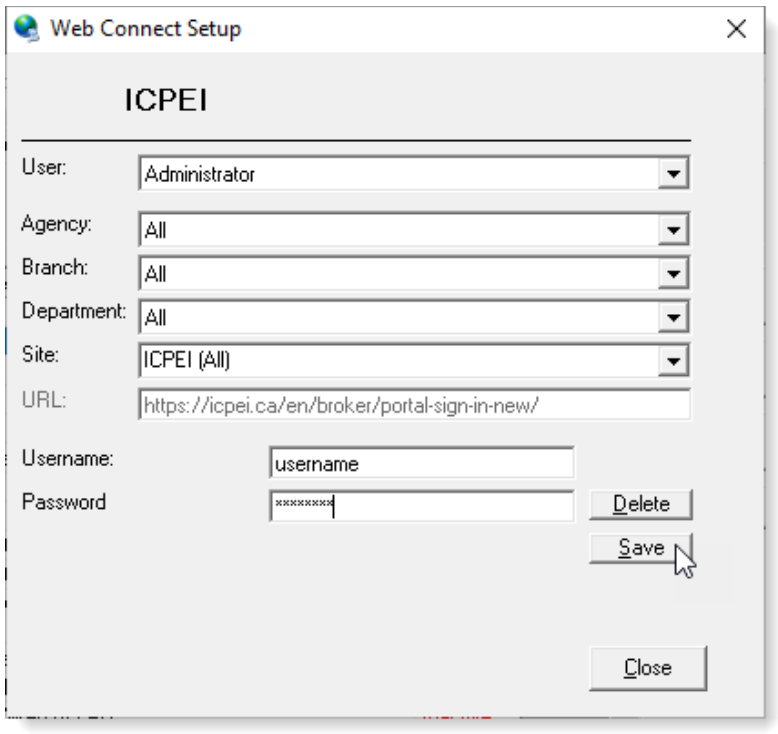
To set up the ICPEI Online Quoting feature,

1. Before you begin, ensure you have the required ICPEI User ID and Password for WebConnect setup. If you require a User ID and Password, please contact your ICPEI Personal Lines representative for assistance.
2. Please have the Brokerage Administrator confirm broker numbers have been added in TBW Lists as follows:
   a. Click **Lists**, **Insurance Companies**.
   b. In the list of companies, double-click **ICPEI**.
   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.
      - Applicable 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.
   d. Click OK in the Company window and click OK in the Lists window.
3. Set up applicable TBW users for WebConnect.
   a. Click **Tools**, **Options**.
   b. On the WebConnect tab, double-click **ICPEI**.



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

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

Yours sincerely,

Rival Insurance Technology