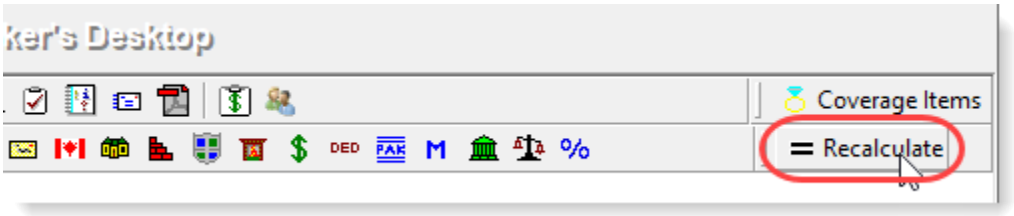
Sandbox Property Online Quoting Now Available for BC Brokers

To help boost your productivity and provide even more value to your customers, Sandbox Mutual Insurance now offers Online Quoting for Property policies in British Columbia.

This enhancement applies to Sandbox's new business property policies in BC, effective July 1, 2026.

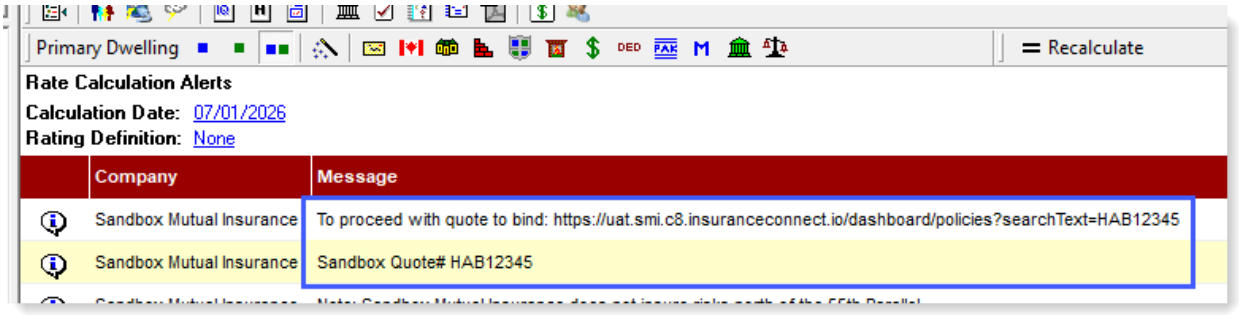
With online quoting, Sandbox rates come directly from their system through a web call. Once the simple setup has been completed, their web service will automatically be called whenever you click the **Recalculate** button in a Sandbox Property IQ.



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 messages or alerts returned by the web service will be displayed on the **Alerts** tab.

For successfully rated online quotes, the quote reference number will appear on the Alerts tab (for example, "**Sandbox Quote# HABxxx**"). A clickable link will also be provided. Click the link to open Sandbox's portal in your web browser. After signing in with your credentials, you can complete and submit the new business application.



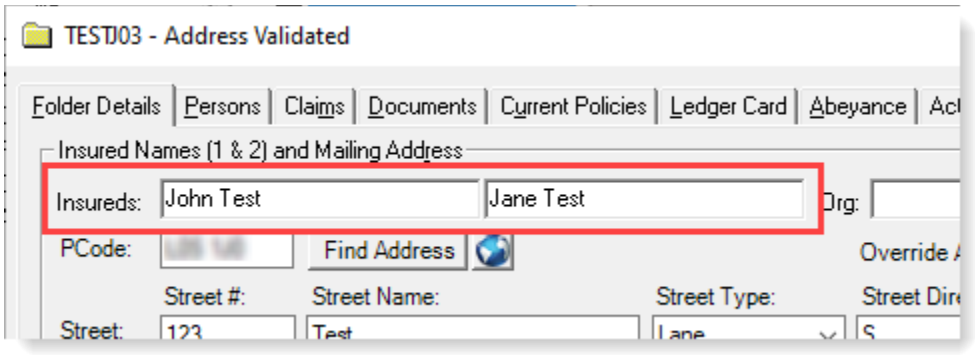
Here are a few points to keep in mind with Sandbox Online Quoting:

- Online quoting is available for new business policies but is not currently supported for renewal quoting.
- Online quoting is available for quotes with a calculation date on or after July 1, 2026.
- Online quoting is available for the following dwelling types: Primary Homeowners, Primary Condo, Add-On Rented Condo, FEC, Add-On Rented Dwelling, Standalone Seasonal Dwelling, Add-On Seasonal Dwelling, and Primary Tenant.
  - Rating is not currently supported for Mobile Home policies.
- Credit Score consent can be submitted in the usual way. Please review the information below regarding the credit score requirement.
- Policy inquiry is available with this enhancement.

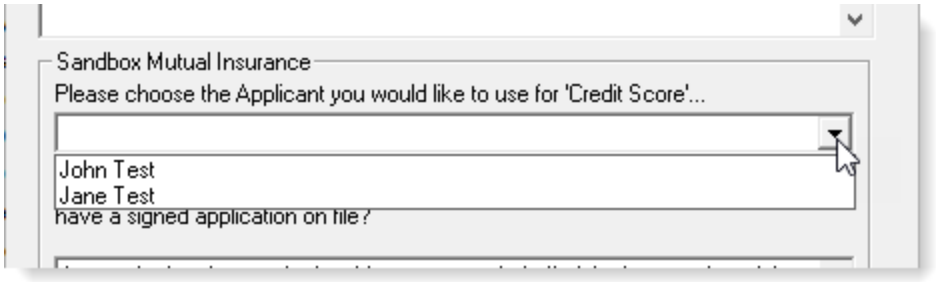
Credit Score Consent with Sandbox Online Quoting

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

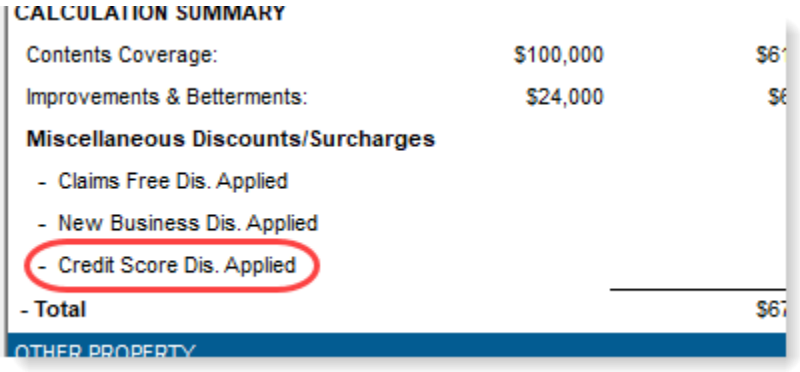
If there are two named insureds on the quote and you would like to use the secondary named insured for credit score, **please switch the names in Folder Details** (making the second named insured the first named insured).



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



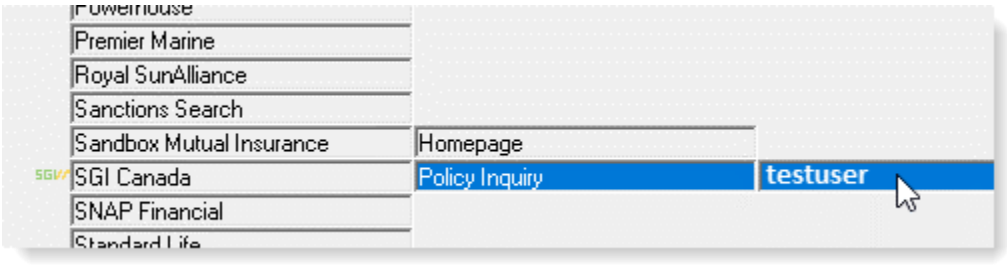
When credit score consent has been submitted, no client credit information will display in the Summary Report. However, when applicable, the Credit Score Discount will be listed under Miscellaneous Discounts/Surcharges.



Policy Inquiry for Sandbox

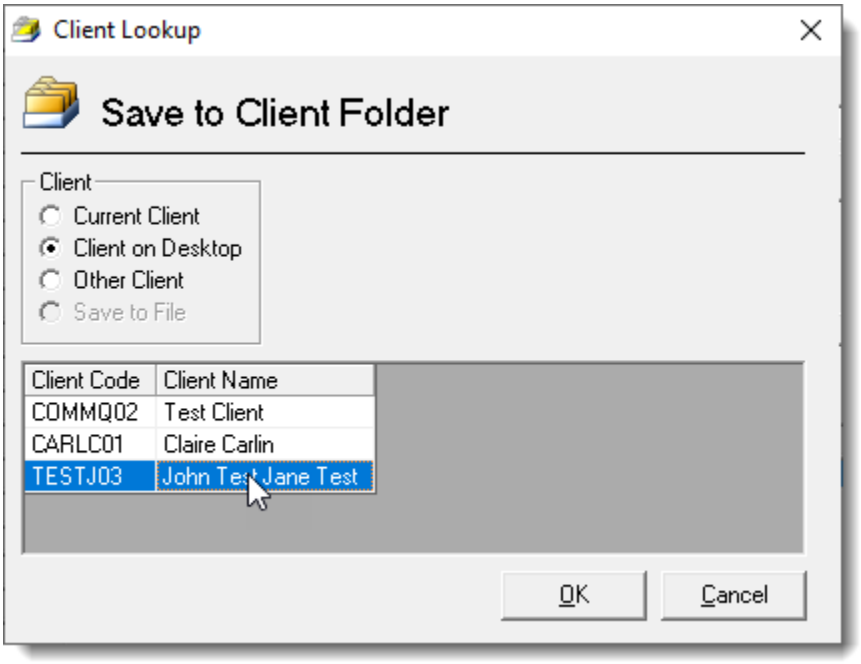
This enhancement also includes the **Policy Inquiry** feature, which allows you to perform a policy inquiry via TBW WebConnect and attach the policy in HTML format to the client folder.

Once the simple setup (see below) has been completed, click the **WebConnect** button on the TBW toolbar. In the WebConnect window, navigate to **Sandbox Mutual Insurance**, **Policy Inquiry**, and select the appropriate **Username**.

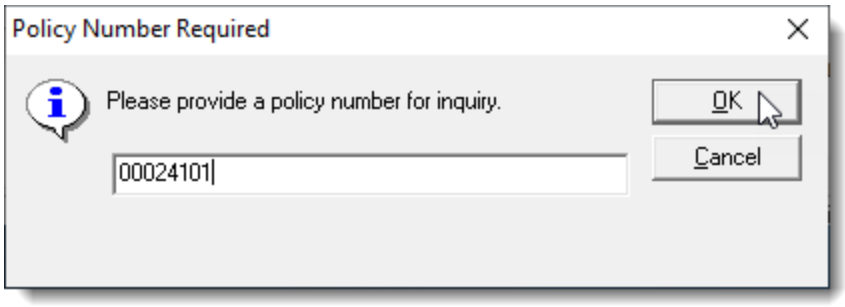


- You can also initiate a policy inquiry from a Sandbox policy document. When viewing the policy in TBW, click the **WebConnect** button on the document toolbar. Applicable inquiry details (e.g. policy number and insured's name) will be populated automatically.

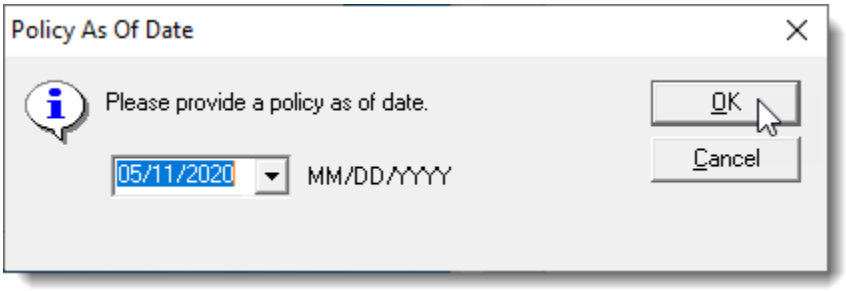
In the **Client Lookup** window, find and select the client folder where the policy will be saved and click OK.



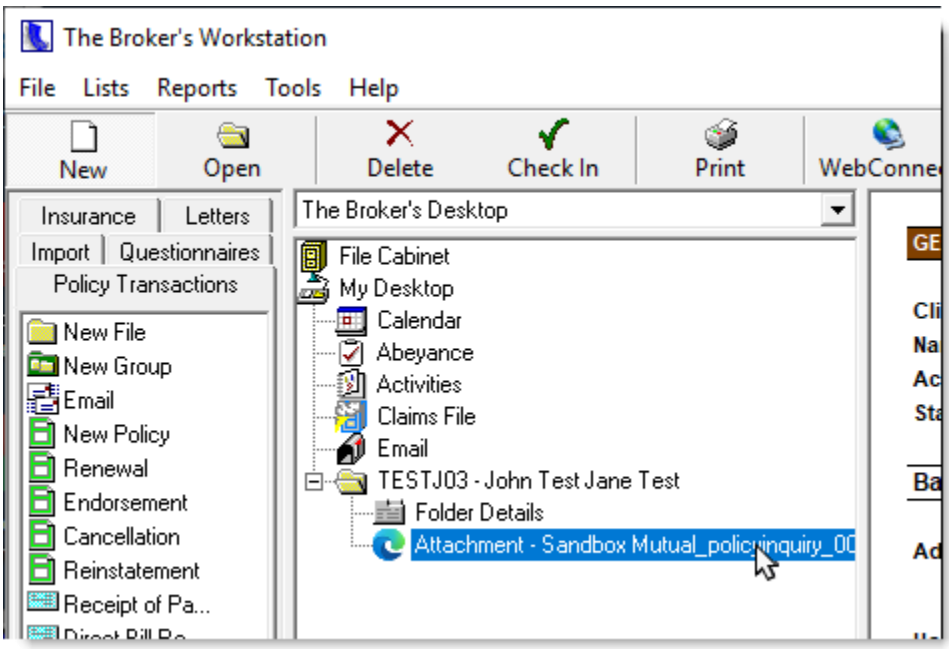
Next, in the **Policy Number Required** pop-up, provide the Sandbox policy number and click OK.



Enter the date in the **Policy As Of Date** pop-up and click OK.



Once generated, the policy (in HTML format) will be attached to the client folder. Double-click the file to open it in a web browser window and view policy details.



Setup for Sandbox Online Quoting

Please ensure the following setup items have been completed for Sandbox Online Quoting.

Broker Numbers

Broker Numbers are required for Sandbox Online Quoting. Your broker numbers may already be added in your system, so please confirm they have been set up correctly by following the steps below.

1. Click **Lists, Insurance Companies** in the TBW window.
2. In the list of companies, double-click **Sandbox**.
3. Select the **Company Branch Details** tab. In the **Broker Numbers** section, verify that:
   - The appropriate broker number is entered for each Agency-Branch-Department within your organization.
   - The broker number used for **Online Quoting** is set as the **Default** broker number.
   - **If broker numbers have not yet been set up, they will need to be added.** To ensure they are configured correctly, please contact **Rival Client Services** for assistance with adding or updating your broker numbers.
4. Click **OK** to close the **Company** window, then click **OK** to close the **Lists** window.

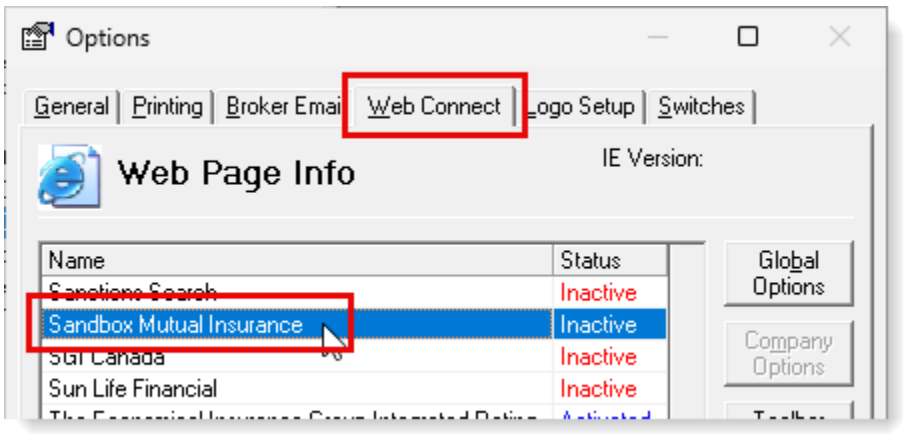
WebConnect

WebConnect setup is required for the Sandbox Policy Inquiry feature.

Important: If you have already completed the required WebConnect setup, no further action is needed unless you are setting up a new user or your office has not previously used any Sandbox WebConnect functions.

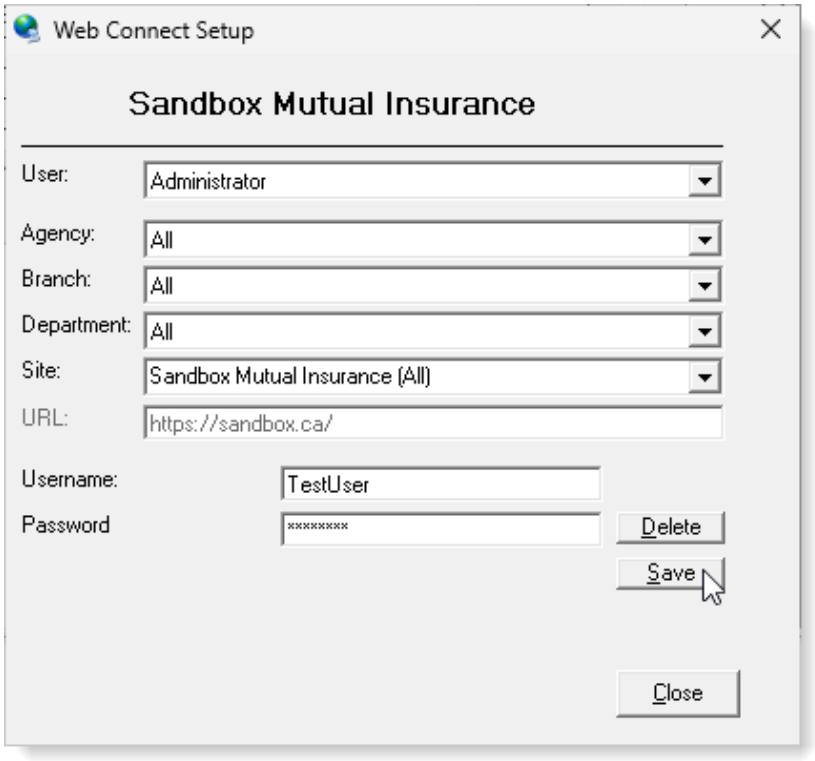
To set up WebConnect for Sandbox,

1. Confirm you have the required User ID and Password.
   - If you require a User ID and Password, please reach out to your Sandbox Personal Lines representative.
2. Click **Tools**, **Options** in the TBW window.
3. Double-click **Sandbox Mutual Insurance** on the WebConnect tab.



4. In the WebConnect Setup form,
   a. Select the **User**.

b. Select **All** or the applicable Agency-Branch-Department (ABD).
c. Ensure **Sandbox Mutual Insurance (All)** is selected in the **Site** menu.
d. Enter the **Username and Password**.
e. Click **Save**.



f. Click **OK** in the Save Username/Password pop-up.
g. Repeat these steps as needed for other ABDs and/or users.
h. Click **Close** in the WebConnect Setup window.
   - *Be sure to update WebConnect Setup details whenever you reset your password.*

5. Click **OK** to close the Options window.

TBW Update Utility

Once setup is complete, please close TBW, run the TBW Update Utility, and then reopen the program.

If you have any questions, please reach out to our Client Services Team by Email (support@rivalit.com) or Chat (https://supportdesk.rivalit.com/).

Thank you for using TBW.

Yours sincerely,

Rival Insurance Technology