



29 May 2009

**To: The Broker's Workstation Users**

Dear Valued Client:

## **Re: The Broker's Workstation – Important Releases and Changes**

Custom Software Solutions Inc. (CSSI) is pleased to announce the release of the following enhancement to **The Broker's Workstation (TBW)**:

### ***Contents***

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1. [Word Processor Field Associations](#) – Use the Field Association feature in TBW's word processing component to modify or replace specific field data in the indicated template document.

## **1. Word Processor Field Associations**

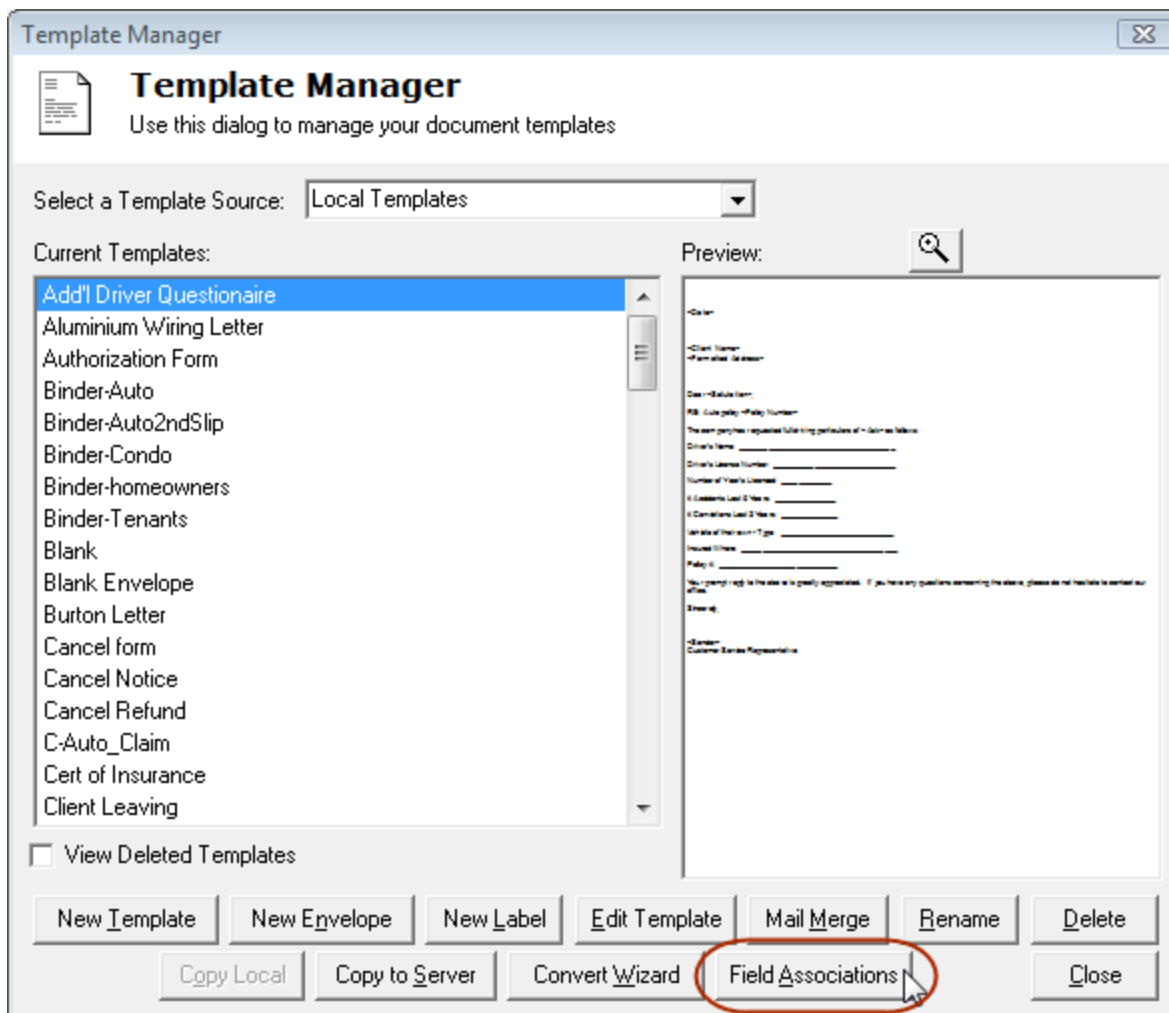
We are pleased to announce the release of the Field Associations feature, which allows the TBW user to modify or replace the information in data fields inserted in template documents in TBW's word processing component.

Setting a Field Association will cause the content of a data field in a particular template to be replaced with the assigned value or text. Once a Field Association has been set, the user can simply use the template to create a document as usual, and the field data will automatically be replaced with the content assigned by the Field Association.

The Field Associations management utility can be accessed from two locations in TBW:

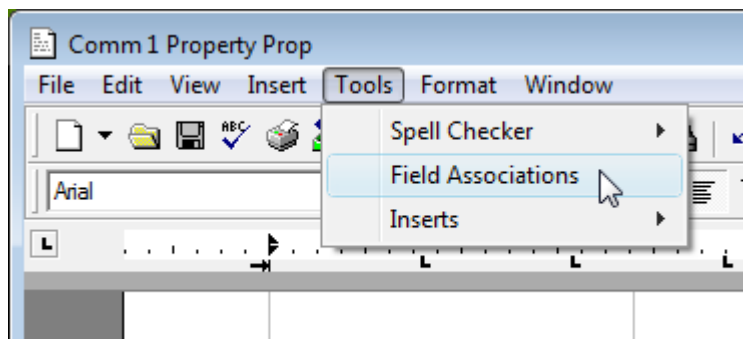
- Click **Tools, Template Manager**. In the **Template Manager window**, click the **Field Associations button** (see Figure 1.1).

(Figure 1.1)



- In the word processing window, click **Tools, Field Associations** (see Figure 1.2).

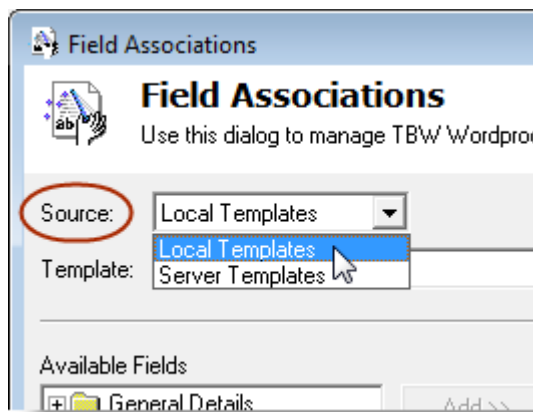
(Figure 1.2)



The **Field Associations window** will open. To manage the data for a *specific data field* in a *specific template*, follow these steps:

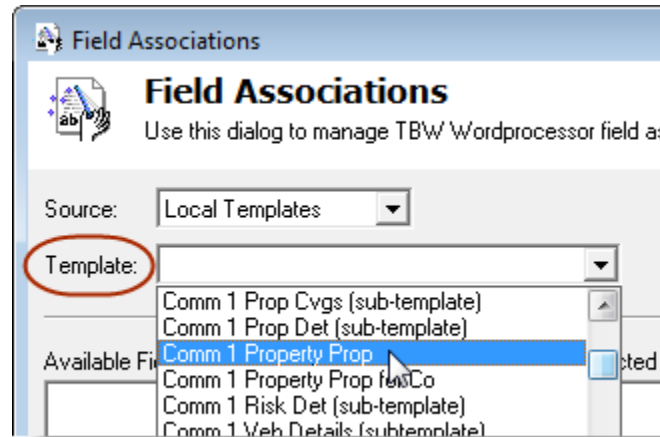
- a. Select the location of the target template from the **Source drop-down menu** (see Figure 1.3).

(Figure 1.3)



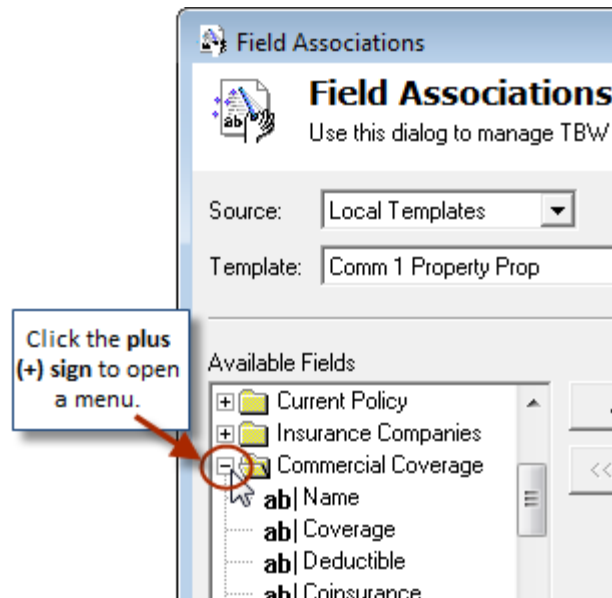
- b. Select the specific template to which the field association will apply from the **Template drop-down menu** (see Figure 1.4).
  - Note that the **Available Fields list** will automatically be populated with all of the fields found in the selected template.

(Figure 1.4)



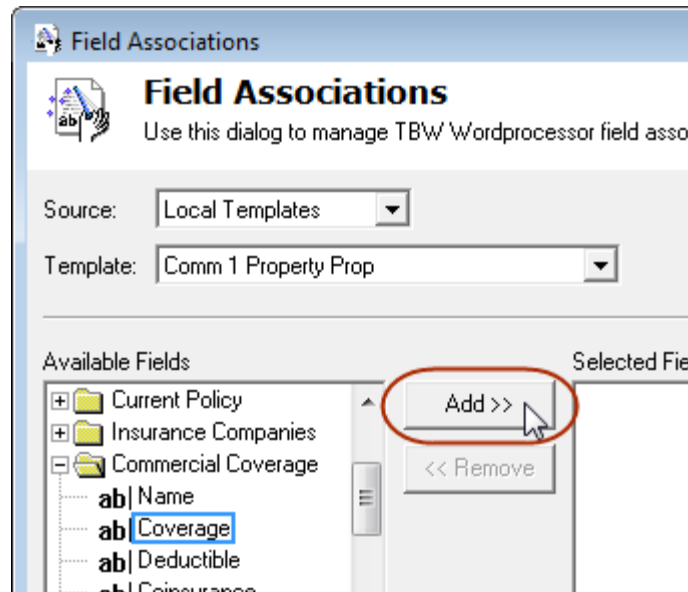
- c. In the **Available Fields** box, open the menu containing the data field by clicking the **plus (+) sign** (see Figure 1.5).

(Figure 1.5)



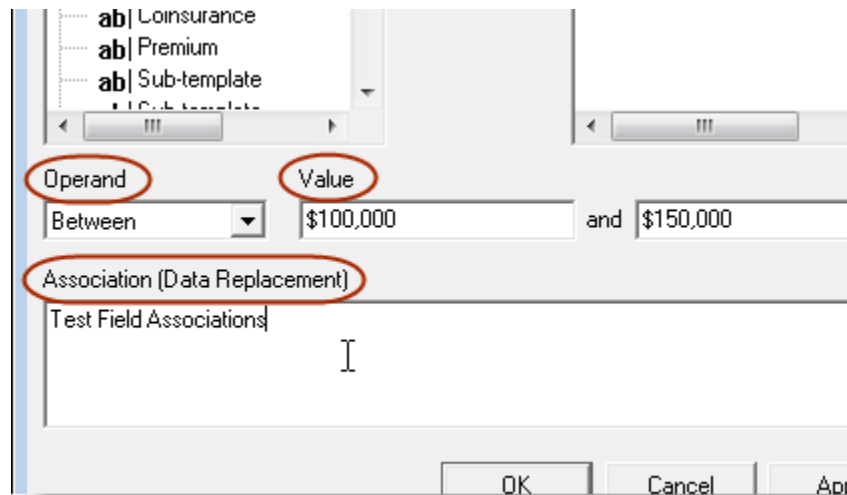
- d. Click the target data field, and then click the **Add button** (see Figure 1.6).
- The data field will be copied to the **Selected Fields** list.

(Figure 1.6)



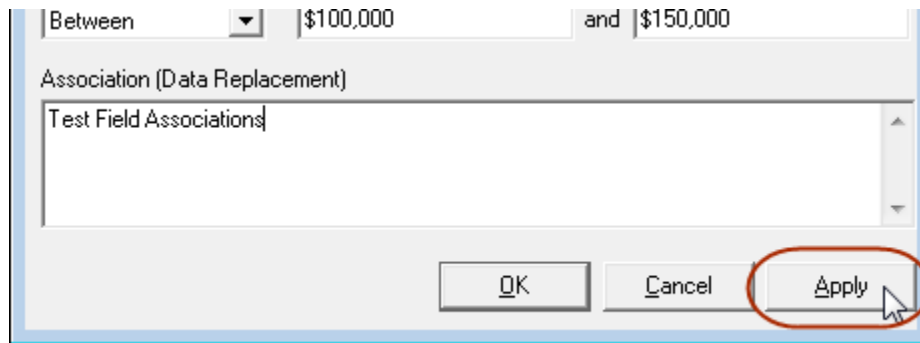
- e. Set parameters and values for the new Field Association using the **Operand**, **Value**, and **Association** fields (see Figure 1.7).
- Use the **Operand drop-down menu** to indicate the relationship between the existing data and the replacement data.
  - Use the **Value field** to define the value or parameters of the original field data.
    - Remember to enter a value just as it would appear in the document (i.e. including commas, currency format, etc.)
  - Use the **Association field** to indicate the new data that will replace the original field data under the defined conditions.
    - Note that a Field Association can be a value, a number, text, or any combination of these.

(Figure 1.7)



- f. Click **OK** to save the newly created Field Association.
- To save the Field Association, but remain in the Field Association window, click **Apply** (see Figure 1.8). The Association will be saved, and you will be able to continue working in the window.

(Figure 1.8)



- g. *Optional:* To add additional Field Associations to that or another template, repeat the steps given above.

Once the Field Association has been assigned, the Association data will appear in the document in place of the original field data (see Figure 1.9).

(Figure 1.9)

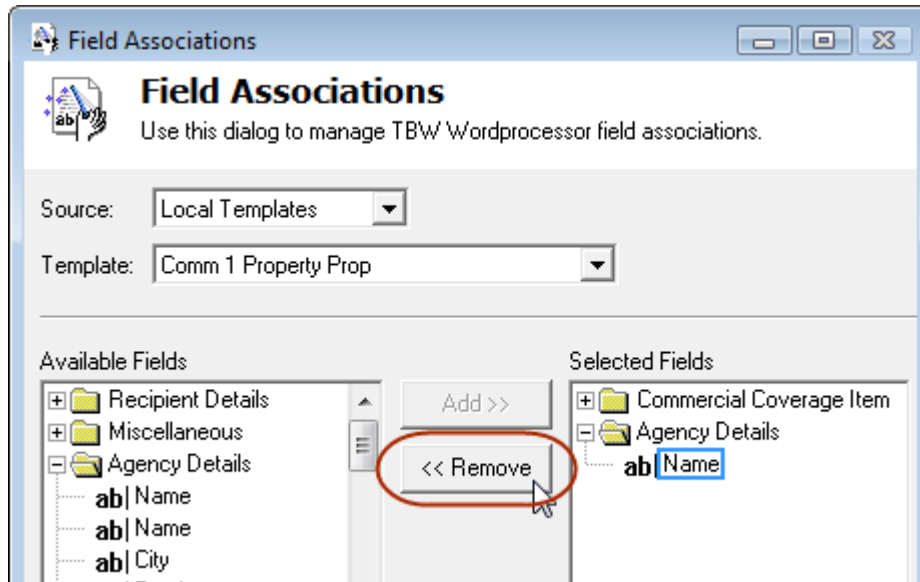
The screenshot shows a software window titled "{QUOTC01} - Comm 1 Property Prop". The window contains a menu bar (File, Edit, View, Insert, Tools, Format, Window) and a toolbar with various icons. Below the toolbar is a font settings area (Calibri, 12) and a ruler. The main content area displays a table with the following structure:

<i>By Location</i>		
Risk Details (Loc #1, Bldg #1) - 120 Wasagaming Dr Wasagam		
Coverage	Limit	Deductible
<b>Property</b>		
Commercial Building, Equipment and Stock - (Broad Form)	\$225,000	\$5
Equipment	\$6,000	\$5
Contents	Test Field Associations	\$5
Business Interruption	\$50,000	\$5
<b>Crime</b>		

Any Field Association assigned to a particular template will be listed in the **Selected Fields list** in the Field Associations window. To make a change to an existing Field Association, click the field in the Selected Fields list, make any necessary modifications in the **Operand, Value, and/or Association** fields, and then click **OK**.

To delete an existing Field Association, simply click the field in the Selected Fields list, and then click the **Remove button** (see Figure 1.10). The Association will be deleted.

(Figure 1.10)



The current User Rights for **Field Associations** assigned to a particular user (through **Tools, Administrative, User Manager, Rights**) will determine that user's access to the Field Associations feature.

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Please share this information with all TBW users in your office(s). Once you have reviewed this document, if you have any questions regarding this feature or need further assistance in its usage, please contact our Client Services Team at [clientservices@cssionline.com](mailto:clientservices@cssionline.com) (email) or 1-888-291-3588 (toll-free telephone).

Thank you for using **The Broker's Workstation**.

Yours sincerely,

Custom Software Solutions Inc.

