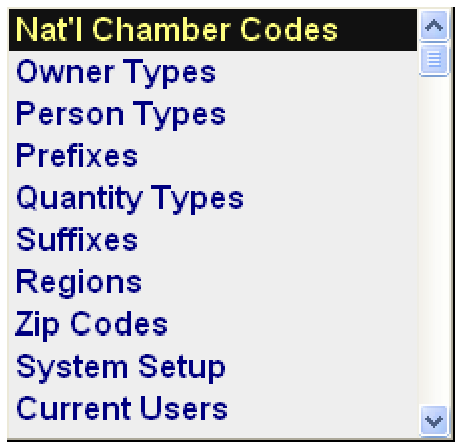
Approved Association More Options

More Options

Launch Approved Association and enter your Logon information to view the Main Menu.

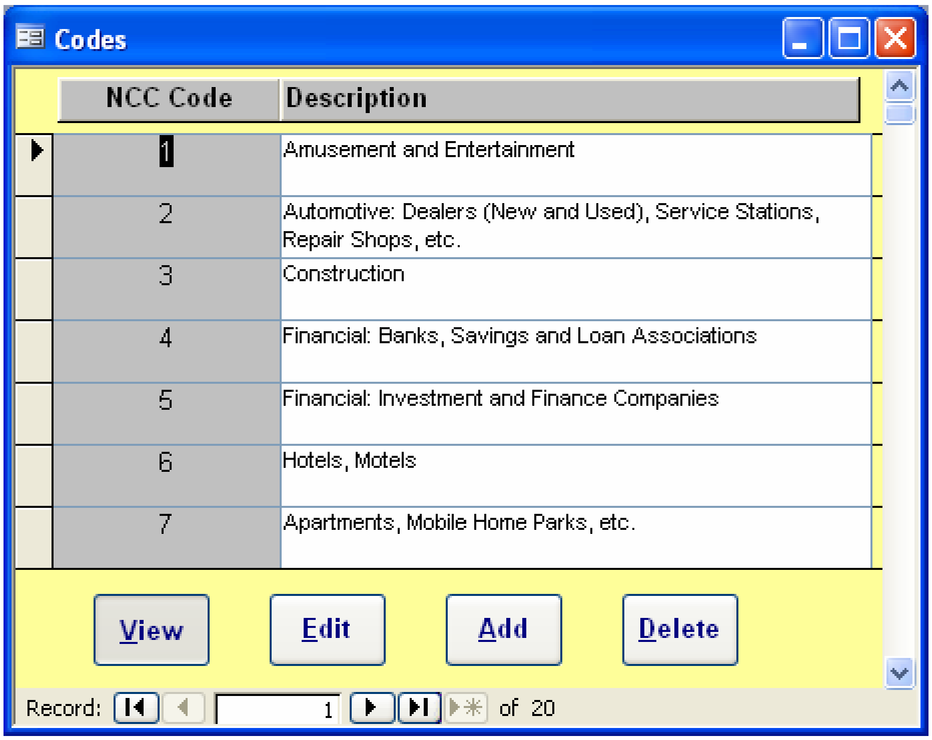
The More Options are similar to the support tables. Two notable exceptions are the **Current Users** option and the **Workgroup Security** option.

On the Main Menu, click the **More Options** button, and then click the Nat'l Chamber Codes item in the list on the right.



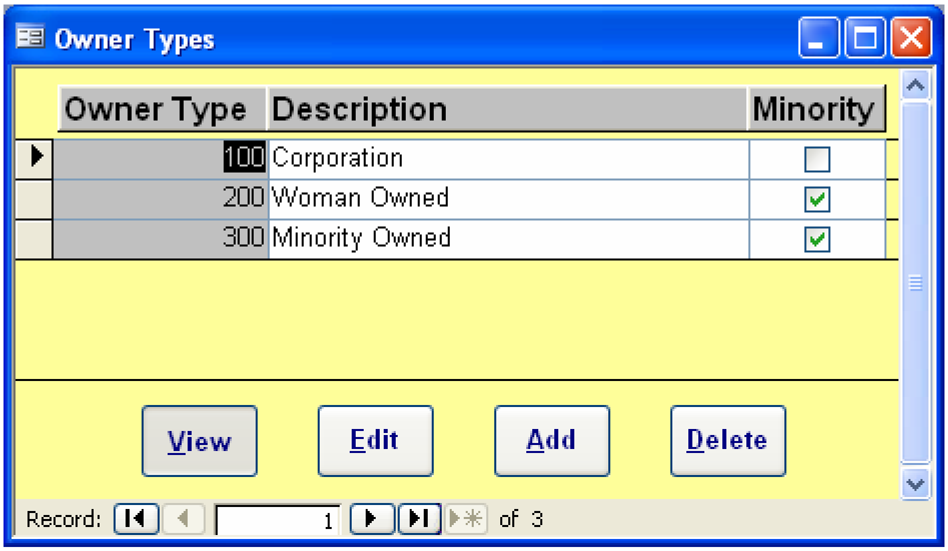
Nat'l Chamber Codes

This form is found only in Companies and Representative Mode. Found in this form are 25 broad Business Categories developed by the National Chamber of Commerce. You have the ability to either add or delete from this list. This is an option feature for you. Using the User-Defined Field form (found in Preferences section) you may change this field caption from NCC to a caption of your choice. You can find this field on the Companies Information form under the "Other" tab.



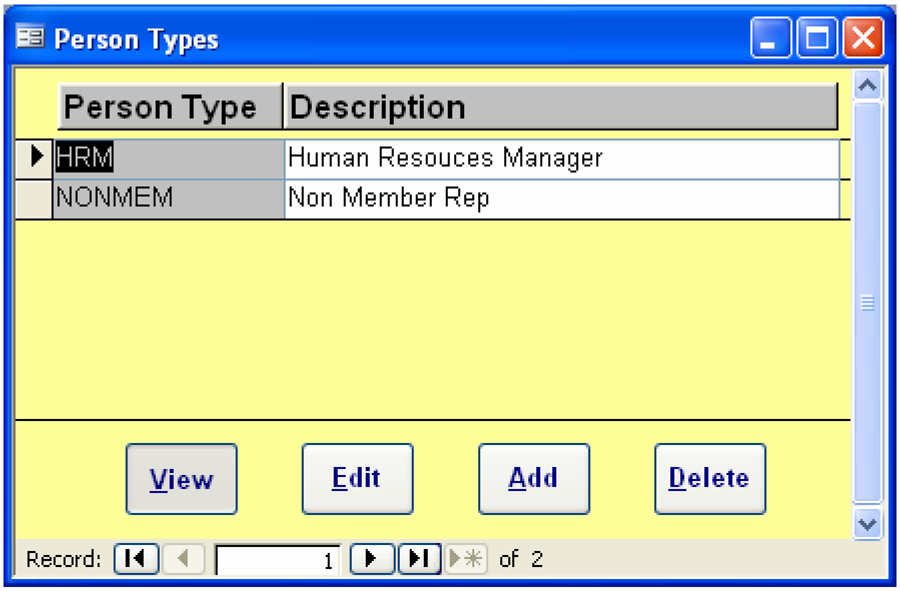
Owner Types

Found in Companies and Representative Mode. Owner Type is meant to classify each company's ownership type. Below you will find an illustration of the Owner Type form and a few examples of what and Owner Type can be. You can find this field on the Companies Information form under the "Other" tab.



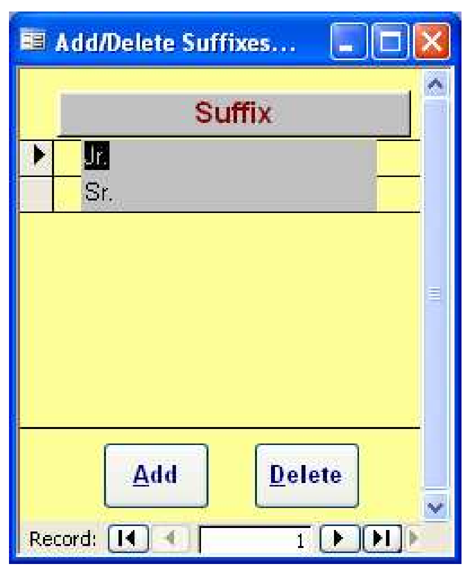
Person Types

Person Type is a way for an organization to classify representatives. You can locate this field on the Representatives form (Persons) in the field called “Type ID”.



Prefixes/Suffixes

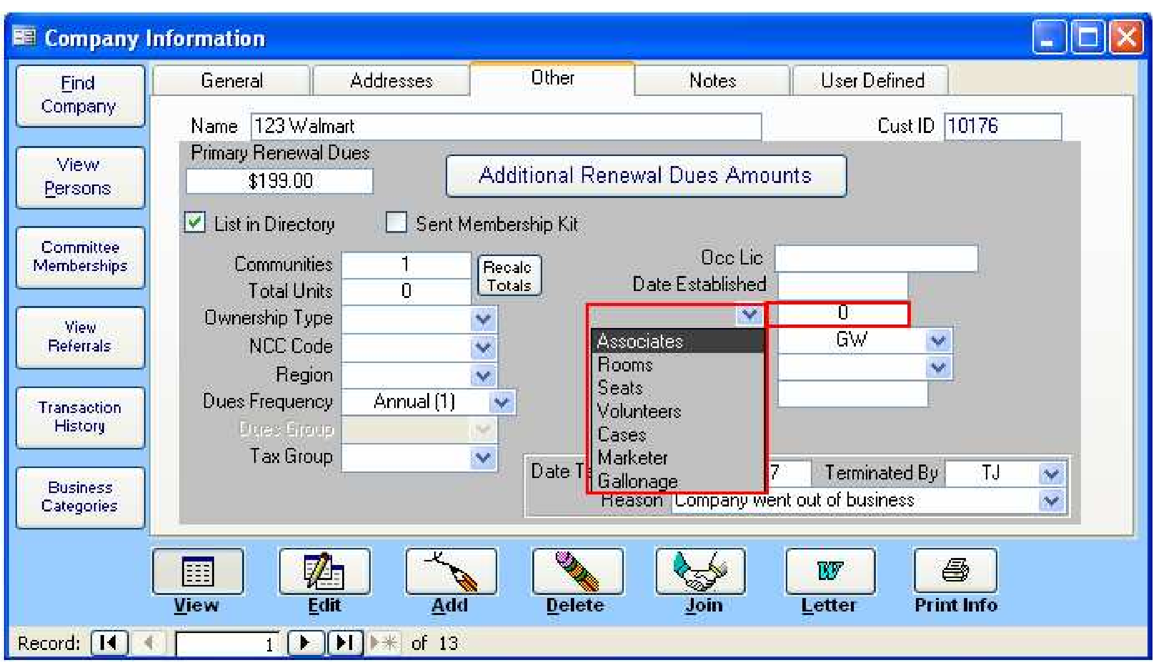
These forms are used to populate the list that makes up the Prefixes and Suffixes used by your organization.



Quantity Types

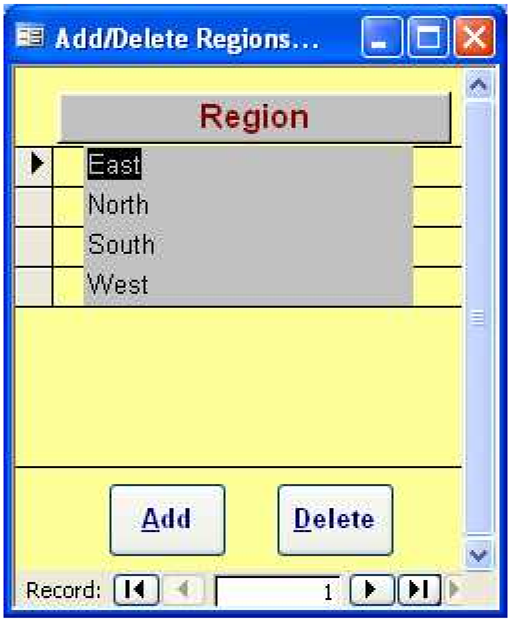
Quantity Types is another way in addition to Full Time Employees and Part Time Employees to quantify how large a company is. For example you would use a quantity type "Rooms" for a Hotel.

The Quantity Type is found on the Company Information form. See below in red. Once you have selected the Quantity type enter the numeric value associated with the quantity type.



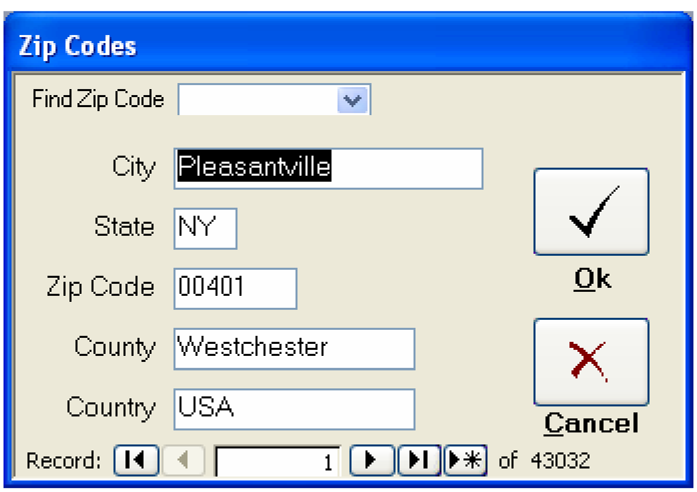
Regions

Regions are a way to classify your member's based on geographical area. You may change the selection of East, North South, West to regions that better fits your organization.



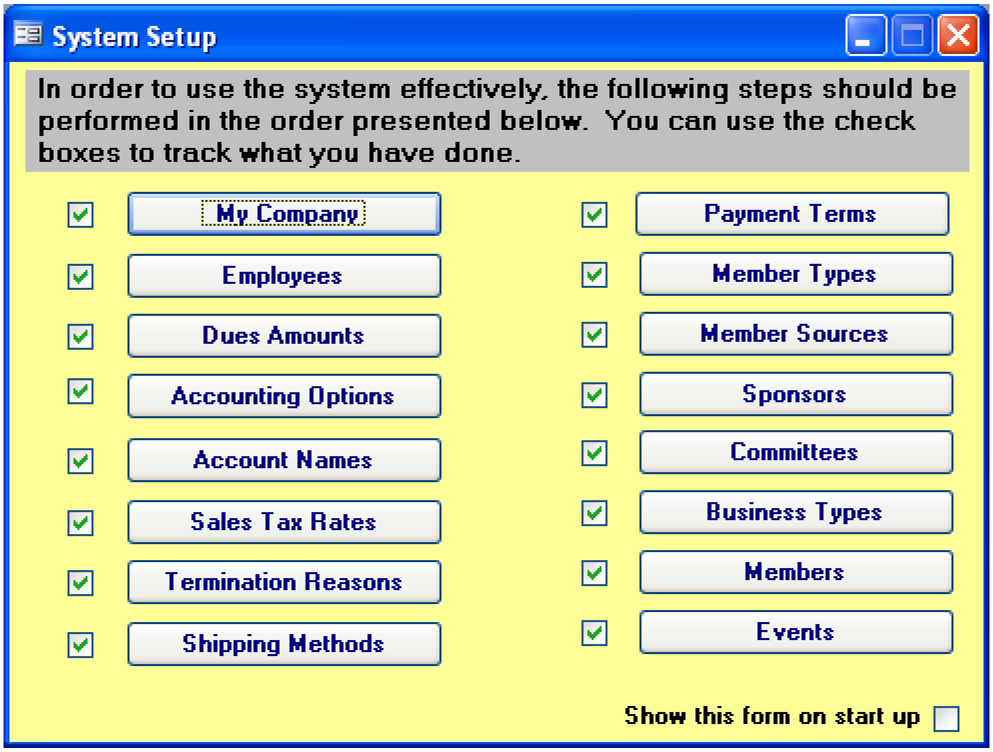
Zip Codes

This form will not be a frequently used form because Zip Codes are atomically added to the database as you enter them. Additionally Approved Association comes with the most Zip Codes already pre-filled for you.



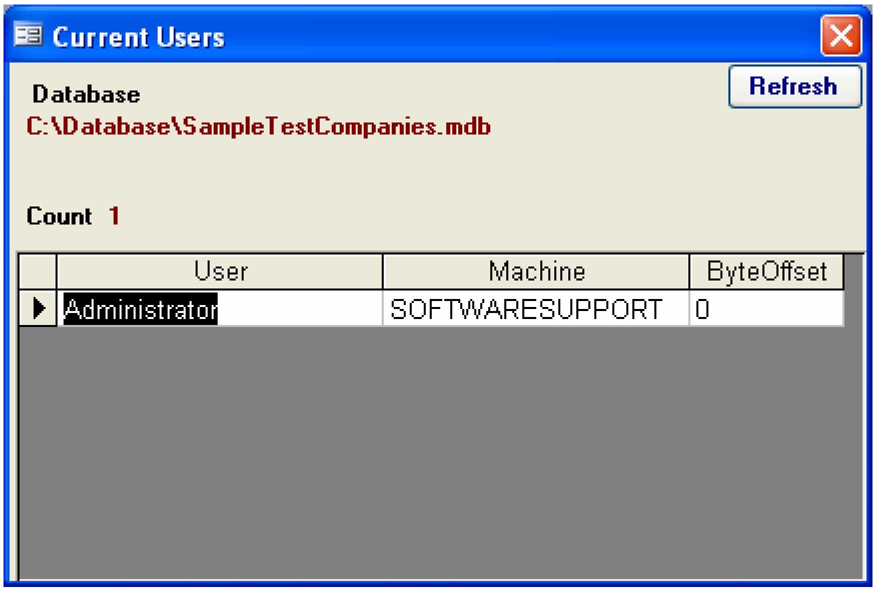
System Setup

This form is described in detail in the System Setup chapter of the manual. The More Options button is another way of accessing the form.



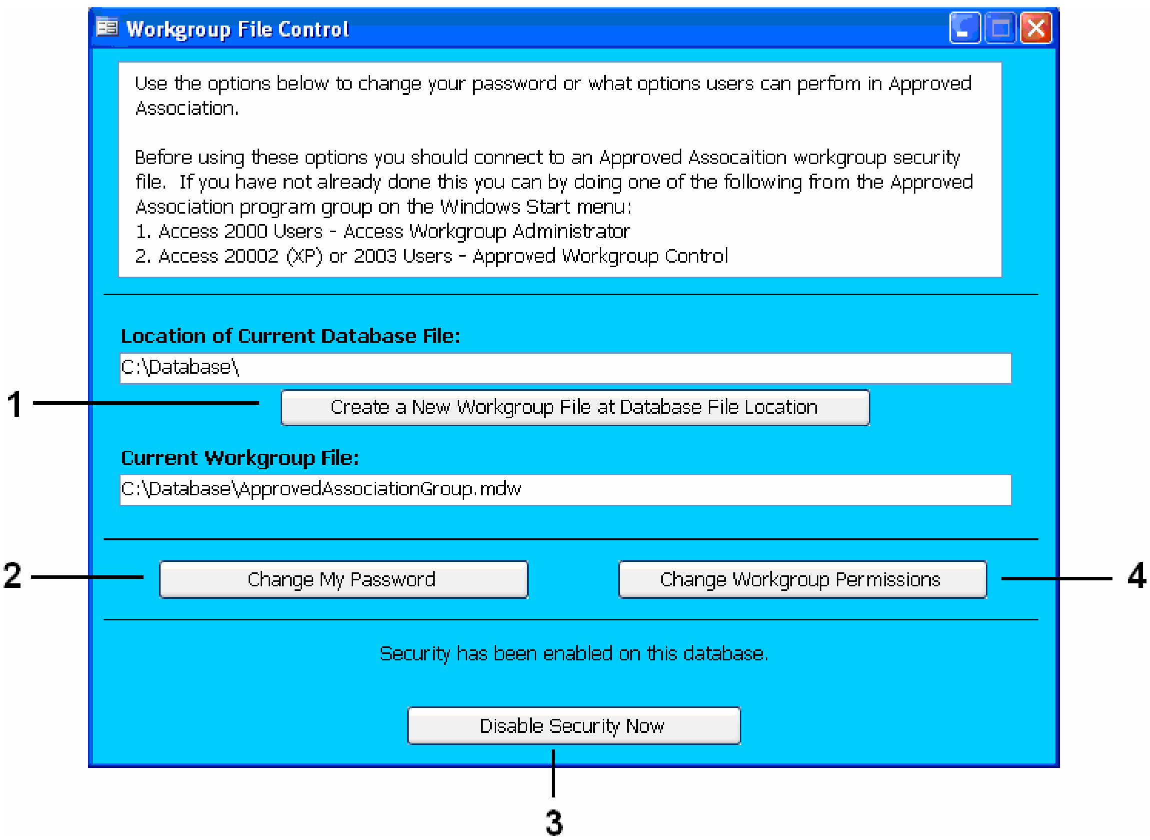
Current Users

This option displays a form listing the users currently using the database, and the name of the database file. This can be useful information as it is the database file that should be backed up frequently using either an automated backup system or Windows' copy commands. It is best to back up the database when no one is using it, so the Current Users screen can show you who needs to exit Approved Association before a backup can be made.



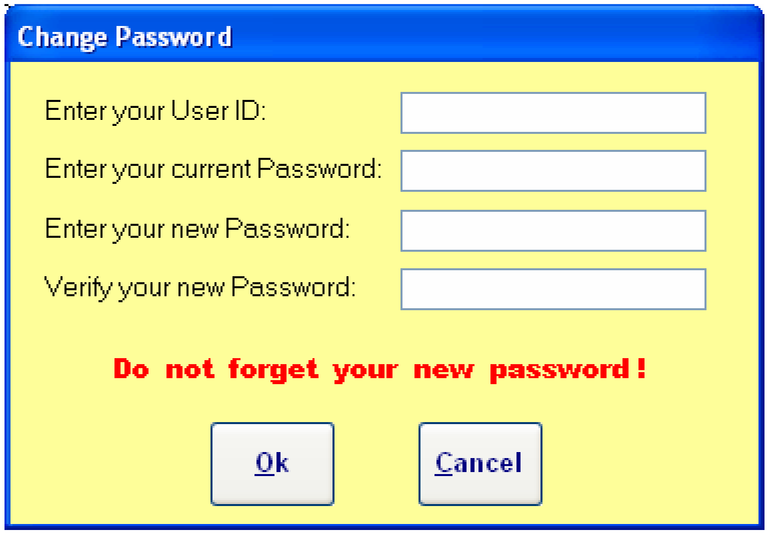
Workgroup Security

Some organizations like to have the ability to keep track and set roles for each employee's task within Approved Association. The Workgroup Security function allows the administrator of the software to assign username and roles for each employee that will be using the software.



1. Create New Workgroup File button – by click this button it creates workgroup file at the designated path shown in the text field above.

2. Change My Password – use this button to change or assign yourself a password when logging into Approved Association

   a. 

3. Change Workgroup Permissions - To Add users click "Change Workgroup Permissions" to open a new form Click the 'New' button on the form
   This will open the 'New User Group' window
   Enter a name for the new user in the upper field labeled 'Name:'
   Re-enter the name that you just entered in the second field labeled 'Personal ID: exactly as you entered it in the first field. Click the 'OK' button
   Assign the User as a "Member Of" the "Available Groups" that they should have the rights for.

   a. 

4. Disable Security Now – by disabling the security feature the program no longer check the roles assigned to the user by the administrator. The user will have full rights in the software.