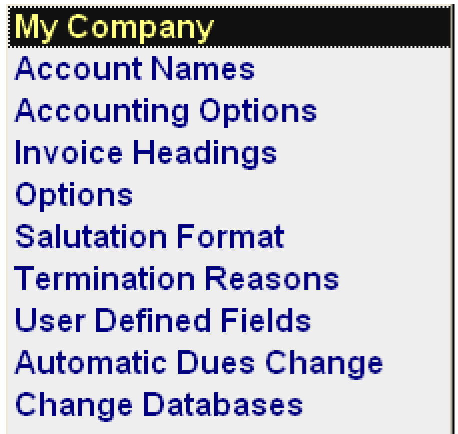
Approved Association Preferences

Preferences

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

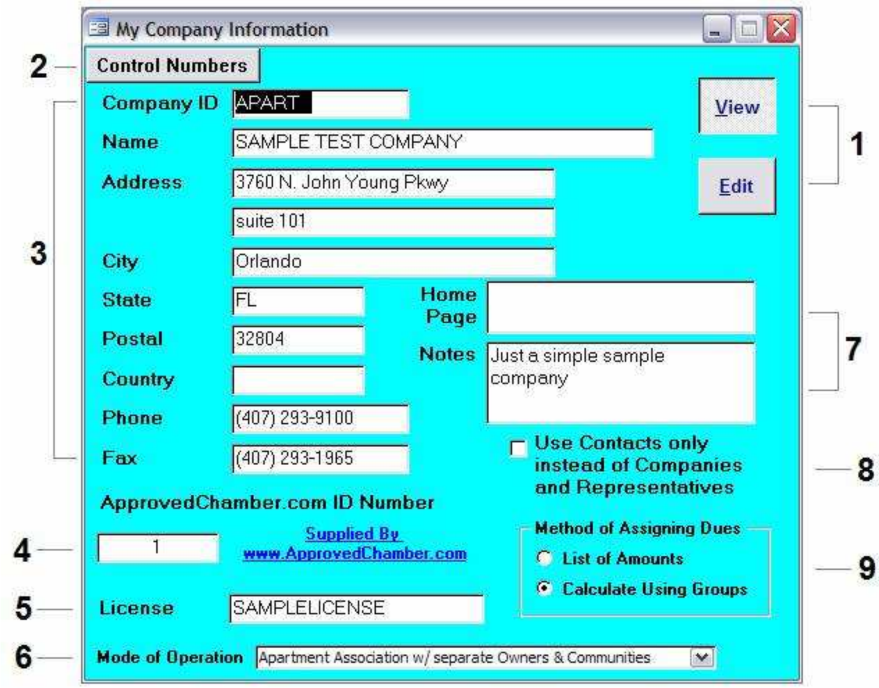
On the Main Menu, click the **Preferences** button to view the list on the right.



My Company

You may have located the My Company section during the System Setup stage of the Manual. Nevertheless the information is listed below for you.

The My Company Information window is where you enter your organization's information, mode of operation, database configuration (Companies and Representatives or Contacts Only) and Approved Association license.



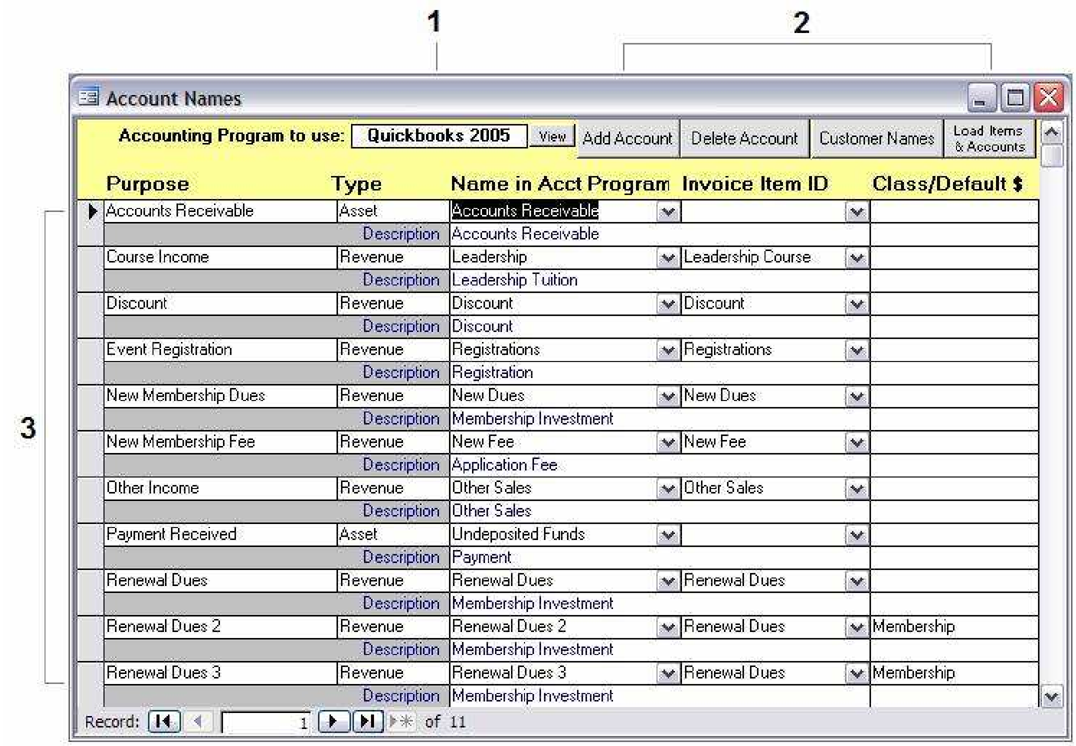
1. Command buttons
    a. View: this is the default state of a window when it first opens. You can view information, but not make changes.
    b. Edit: click this button to edit information. Your security settings must be set to allow you to make changes, or you will not be able to make edits, even when the button is selected.
2. Control Numbers: every contact that you enter in the database is assigned a unique number. This option lets you assigned the starting number.
3. Address Info: enter your organizations name and address information. Each database created with AA must have a matching Name and License in order to operate. This information is most frequently the purchaser of the software, but not always. In some cases, such as with association management companies, the information will pertain to each client database. When you want to license a new database, send an email request to support@approvedassociation.com with the exact name

of the association or company. CSE will send you a matching license code.

4. ApprovedChamber.com ID Number: the id number is assigned if the organization is going to use the Directory on Web feature to publish a searchable directory or your website. This option is explained in more details in the Members section of the manual. This number is a unique identifier for the company.
5. License: the license is derived from the Name entry, and must be entered exactly to work correctly. Once you have entered the code, press the **Enter** key on your keyboard. This will cause AA to verify the code, and complain if it is not valid. If no error appears, the code is valid and you may proceed. If you see an error alert, check your entry for correctness and try again.
6. Mode of Operation (available only in Companies Rep Mode): this is a drop down list where you can choose what type of Approved Association operation you are going to be working in.
7. Additional
    a. Home Page: enter the organization's website here. To enter information click on the title **Home Page** causing the text box to highlight. Delete sample information and begin typing the company's website.
    b. Notes: an area which may be used as a description or reminder to the user or someone else looking at or using the database.
8. Database Configuration: this indicates, whether the database is in Contacts Only or Companies Representative Mode.
9. Dues Assignment: this designates the way dues are going to be assigned, whether it be by a list or by enabling the Approved Association calculate feature to determine your member's total dues using dues groups.

Account Names

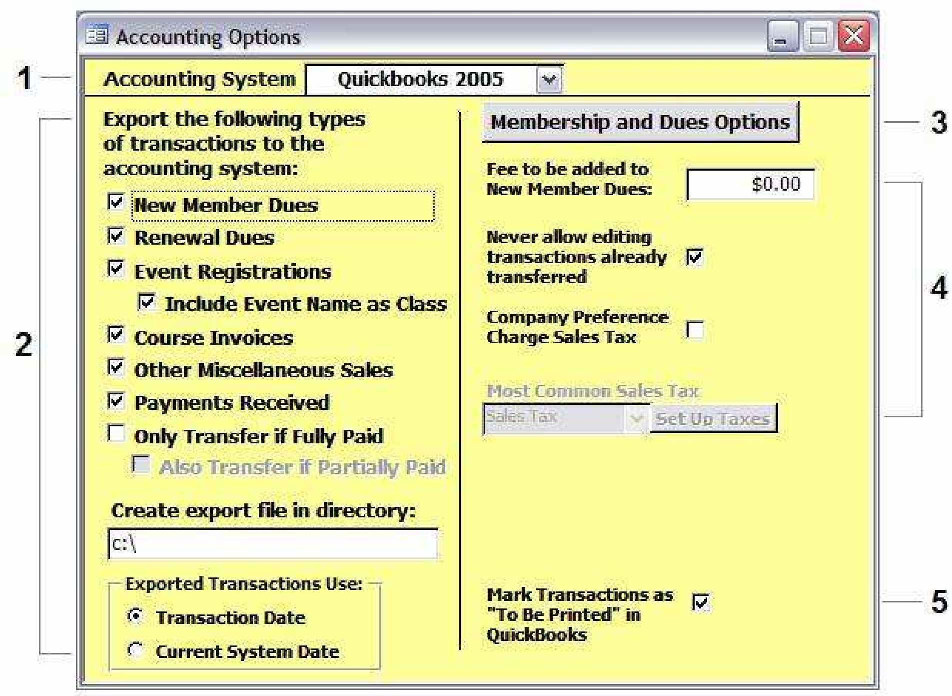
The Account Names window is where you match account names in AA to the chart of accounts in your accounting program. This serves as a cross reference between Approved Association and your accounting system, so that when you transfer transaction they post correctly.



1. Accounting Program to use: this field specifies which accounting program you are currently using and is set on the Account Options form explained in the next section.
2. Command buttons
    a. Add account: allows you to create a new account name
    b. Delete account: allows you to remove an account name
    c. Load Accounts and Items: this feature allows you to load your Items and Accounts from QuickBooks which populate your account names into the drop down list. (this helps match your AA with QB correctly)
3. Chart of Accounts: this a list of the account names that matches with your account names within QuickBooks

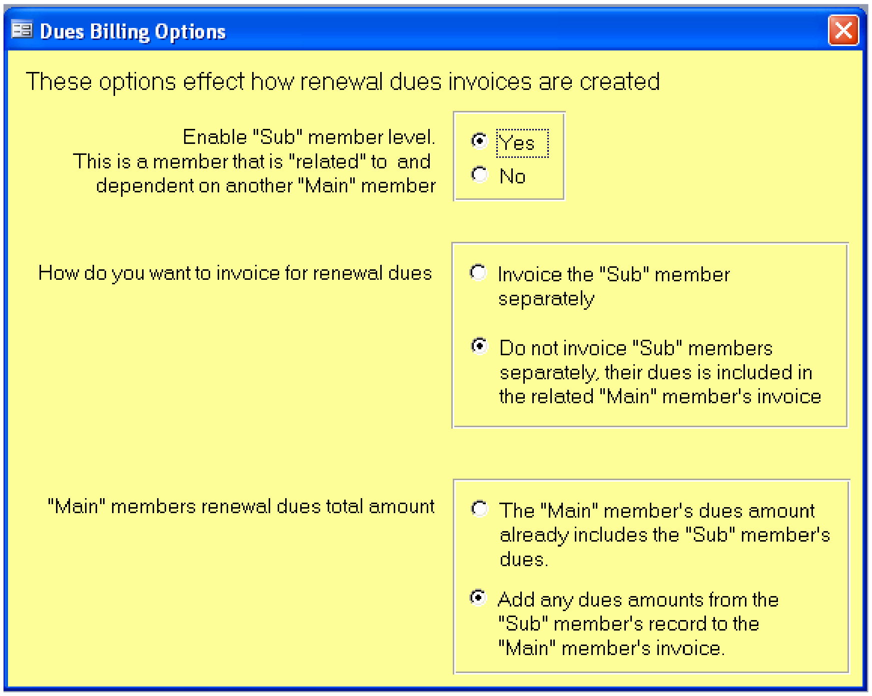
Account Options

The Accounting Options window is where you setup your data to be transferred to QuickBooks, and what transactions you want transferred.



1. Accounting System: AA supports several versions of QuickBooks (desktop), as well as Peachtree, Adagio and other accounting programs. Use the dropdown list to select the accounting program used by your organization.
2. Export Options: this area is designated for you to choose which transactions you would like to be transferred to your QuickBooks. You can select or deselect by checking the check boxes assigned to each type of transaction. The field, **Create export file in directory:** is used only if your QuickBooks version is 2003 and lower. This field allows you to create and export file of the transactions to be imported into QuickBooks. The field, **Exported Transactions Use:** has two options for you to choose from. **Transaction Date** will export the date that appears on the actual transaction date. **Current System Date** will export the transaction with computer's current date.

3. Membership & Dues Options – available only in Contacts Only Mode.

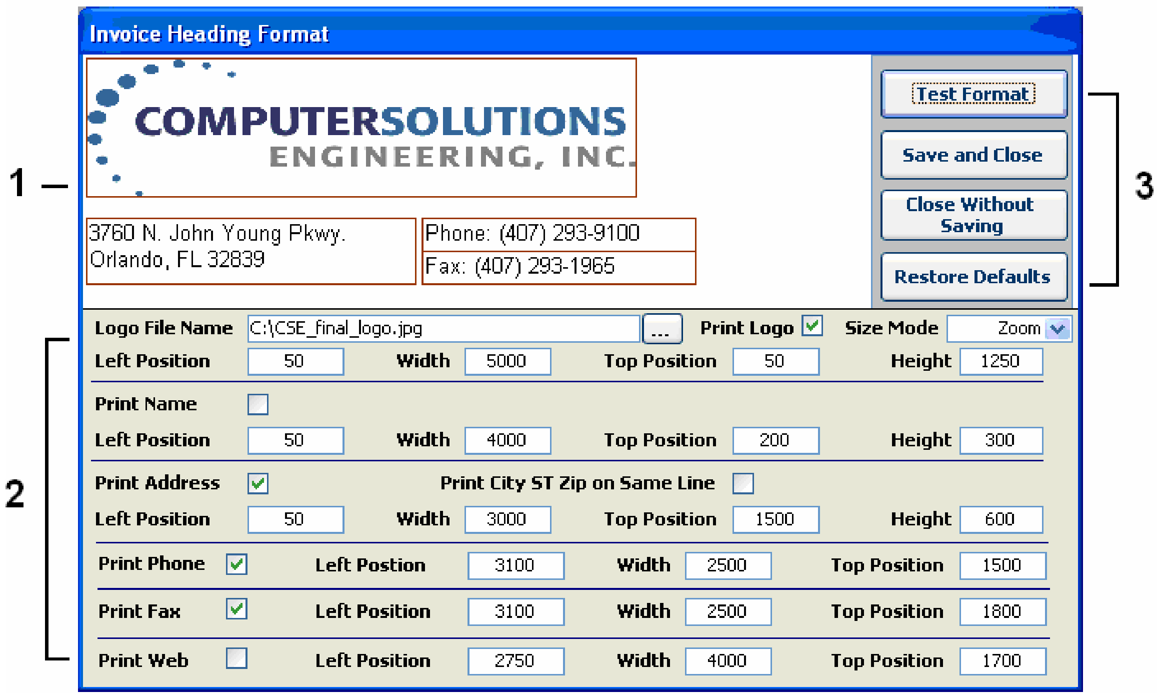


When you click the Membership & Dues Options button the form illustrated above appears. If you have members that are dependent and/ore related to main members then Enable Sub member Level should be set to Yes. If Sub member level is enabled then you have additional choices about how you wish to invoice members for renewal dues.

4. Miscellaneous Accounting Options to choose from. The choices here vary depending on the version of the accounting system you are using.

Invoice Heading

Use the Invoice heading form to control how the top left corner of your printed invoices look. You can even enter the name of a file that has your logo to include it on invoices.



1. Invoice Display Window – this window pane displays the information that will be shown on the top left portion of invoices printed within Approved Association as the Invoice Heading.

2. Invoice Heading Setting - use these settings to make changes to the positioning and display of your Invoice Heading. You may attach your company's logo by browsing out to its designated location. Note: try saving your logo in a folder that does not have a very long path.

3. Command Buttons:

    a. Test Format – use this button to refresh the display view and test the settings you have selected.

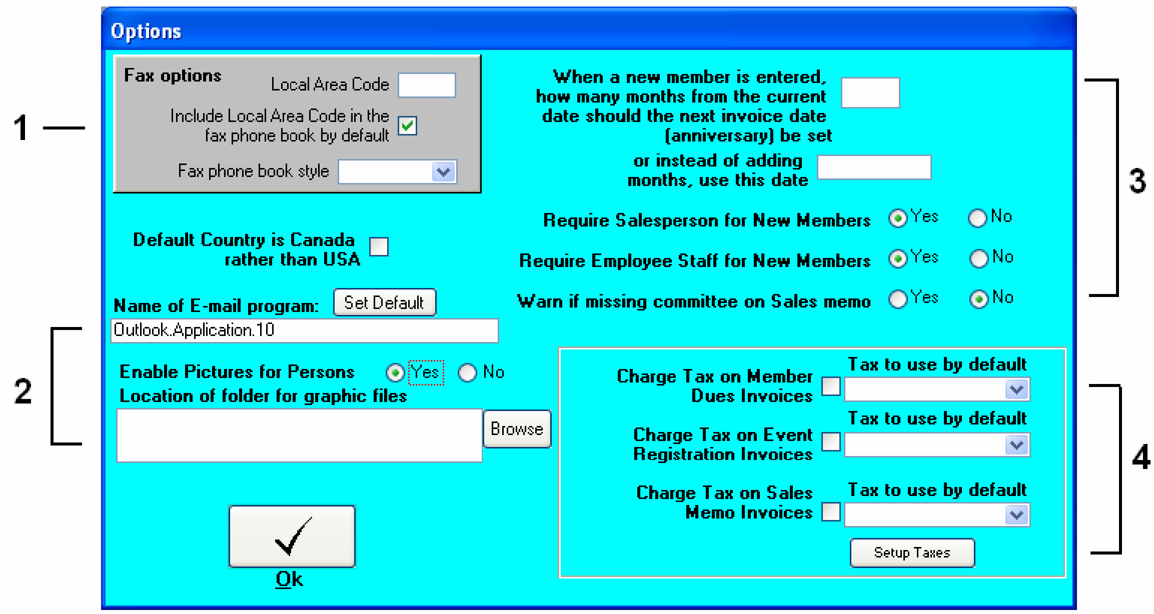
    b. Save and Close – use this button when you are satisfied with the way your logo is formatted to Save and Exit from the form.

    c. Close Without Saving – use this button to Exit the form and NOT save any changes you have made.

    d. Restore Defaults – use this button to reset the positioning setting of the invoice heading.

Options

Options let you tell Approved Association your area code so when you create a fax phone book it knows what numbers are long distance. Also, the version of Microsoft Outlook you are using must match for automatic emails to work correctly. It turns out that Outlook 98 is .8, 2000 is .9, XP is .10, Outlook 2003 is .11 and 2007 .12.



1. Fax Options – enter your faxing preferences in this section of the Options forms. The fax phone book style refers to the faxing system you will be using to send out your faxes.

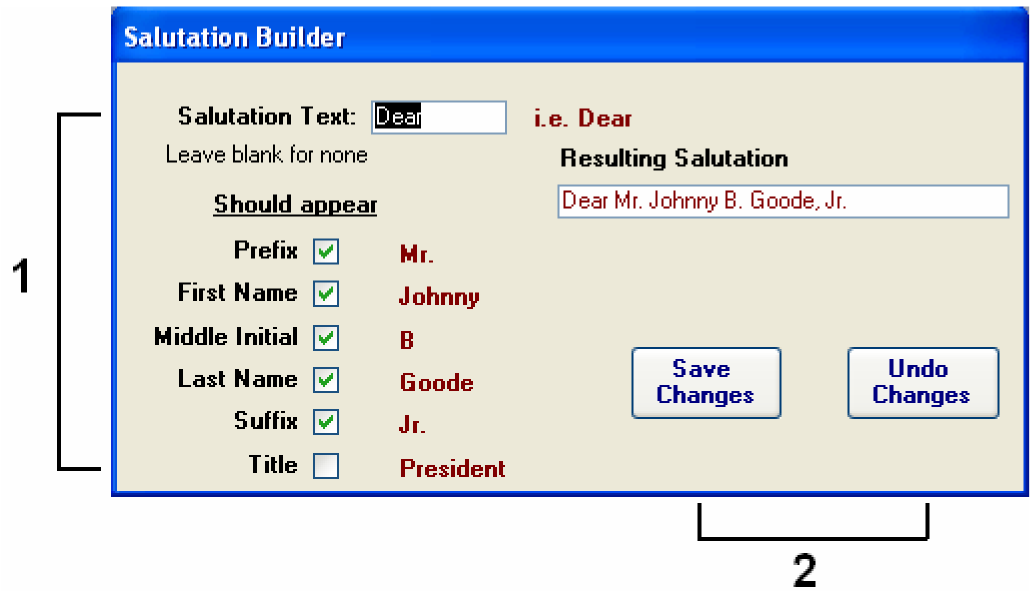
2. Email Program – enter the version of outlook you are currently using on your machine here. Note: you may locate the version of your outlook from the Help option in Outlook then clicking About Microsoft Outlook. The first two numbers will be the version number needed to be entered into Approved Association.

3. New member preferences – this section is where you can setup your billing structure for your members. You can set the system to calculate the next invoice date based on a specific number of months (eg. 11 mths) or you can assign a specific date.

4. Tax Options – this section allows you to turn on the tax feature in Approved Association. The tax settings will apply to all invoices created in Approved Association.

Salutation Format

Use this form to format the Salutation line in Approved Association. Once you have selected the fields that you would like display in the format click the "Save Changes" button to do a global change for all members.



1. Salutation Text and Preferences – enter the text that you would like to appear before you contacts name. If you do not want to have a salutation before the contact name, leave this text field blank. Under the "Should appear" section select the check boxes for the information you would like show in your salutation. The Resulting Salutation text field will display what your salutation will look like with your selections.

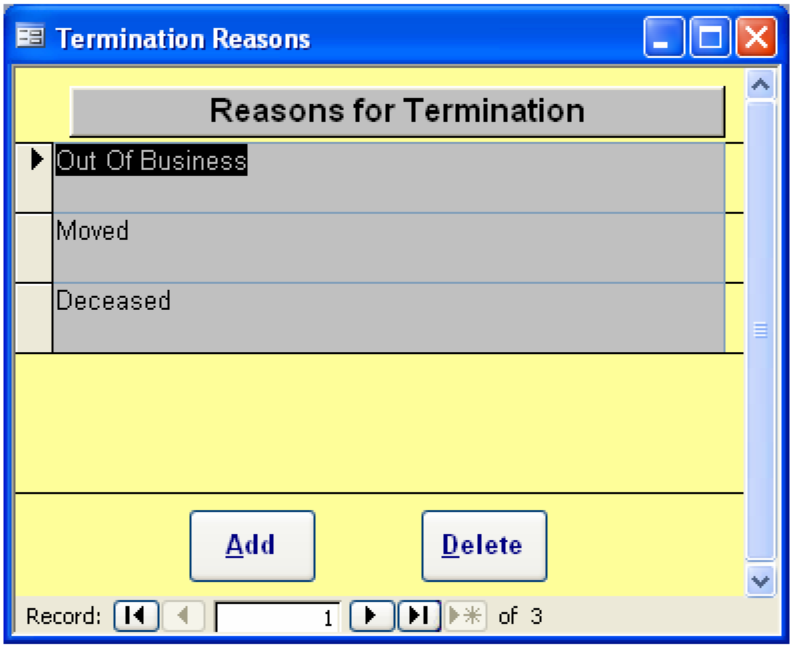
2. Command Buttons:

   a. Save Changes – click this button once you are satisfied with the way your "Salutation" looks. By clicking the "Save Changes" button also runs a global update for all contacts salutation line in the database.

   b. Undo Changes – by clicking this button it closes the form **WITHOUT** saving any changes you made.

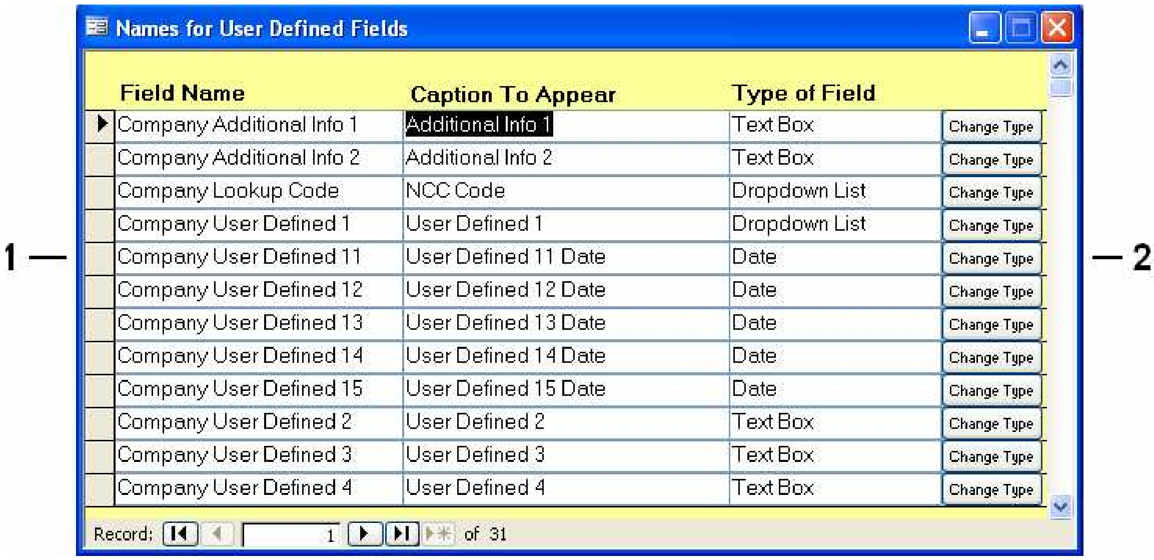
Termination Reasons

Use this form to enter your company's "Reasons for Termination". This feature will be used when you are dropping a contact/company from member status to non-member status.



User Defined Fields

User defined fields lets you control what caption, or label, appears for the many user defined fields available on the Company Information and Person forms.



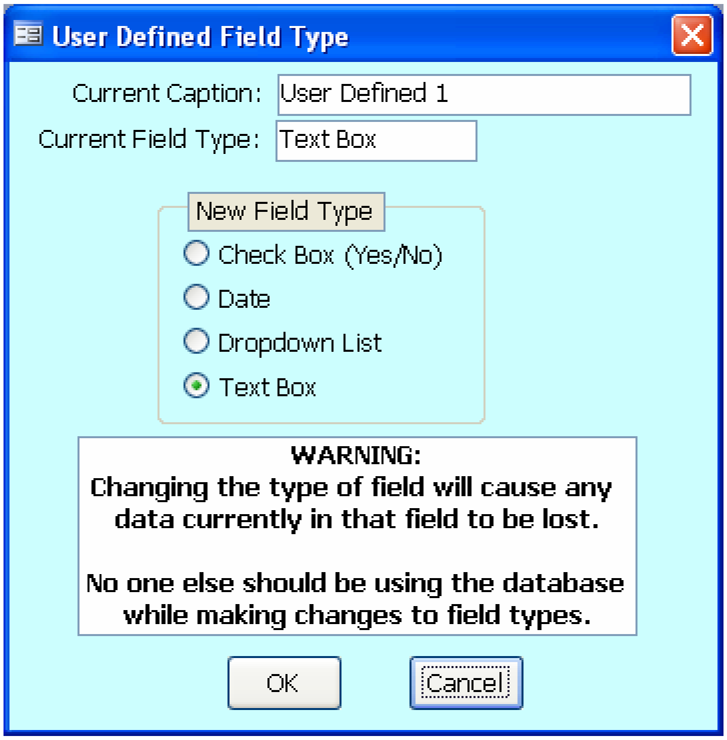
Field Name	Caption To Appear	Type of Field	
Company Additional Info 1	Additional Info 1	Text Box	Change Type
Company Additional Info 2	Additional Info 2	Text Box	Change Type
Company Lookup Code	NCC Code	Dropdown List	Change Type
Company User Defined 1	User Defined 1	Dropdown List	Change Type
Company User Defined 11	User Defined 11 Date	Date	Change Type
Company User Defined 12	User Defined 12 Date	Date	Change Type
Company User Defined 13	User Defined 13 Date	Date	Change Type
Company User Defined 14	User Defined 14 Date	Date	Change Type
Company User Defined 15	User Defined 15 Date	Date	Change Type
Company User Defined 2	User Defined 2	Text Box	Change Type
Company User Defined 3	User Defined 3	Text Box	Change Type
Company User Defined 4	User Defined 4	Text Box	Change Type

1. User Defined Fields:

   a. Field Name – this column displays the user defined field name and numbers so the "User" will know which field they are about to change in the database.

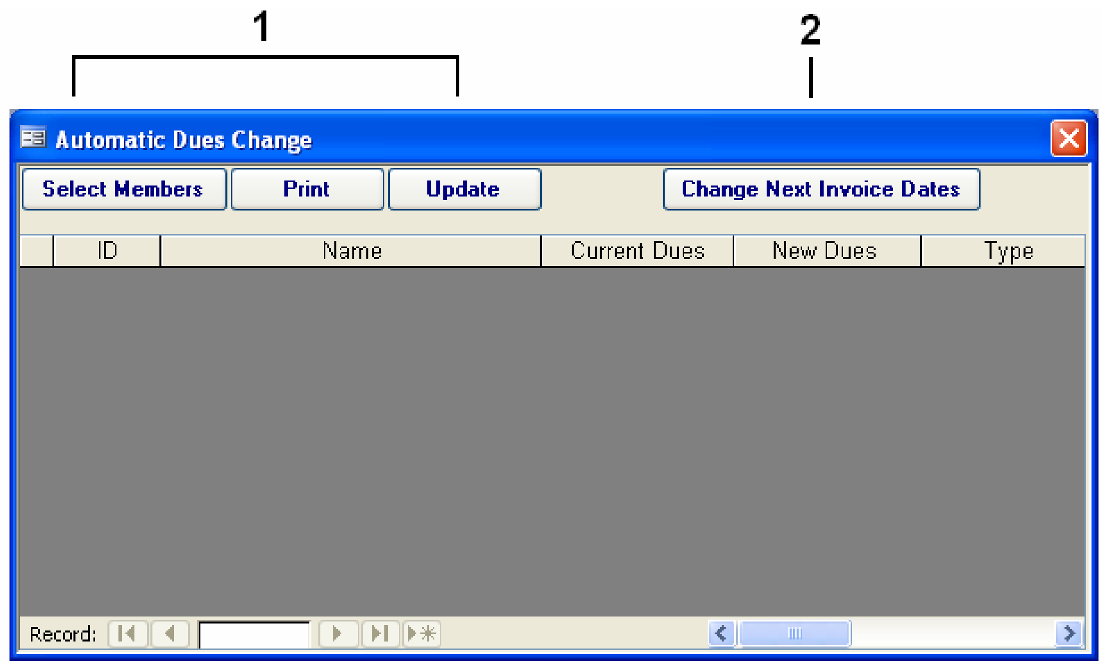
   b. Caption to Appear – in this field you will be able to change the information that is currently displaying to the caption you would like appear for the field you are creating.

2. User Defined Change Type Button – click the "Change Type" button to select the type of field (check box, date, text box, dropdown list) for the user defined field you are editing. The image locate below illustrates the form that will appear once you click the Change Type button.



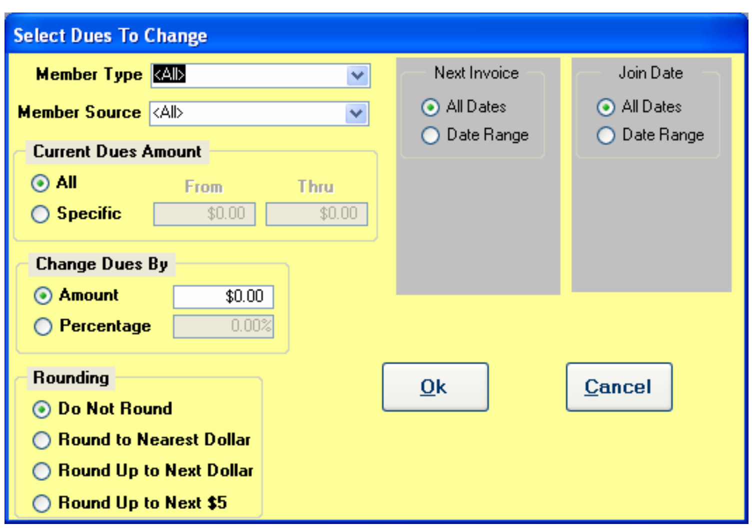
Automatic Dues Change

This option lets you quickly change the annual dues amounts and next invoice dates for your members. You will have an opportunity to review the changes before they are made.



1. Command Buttons:

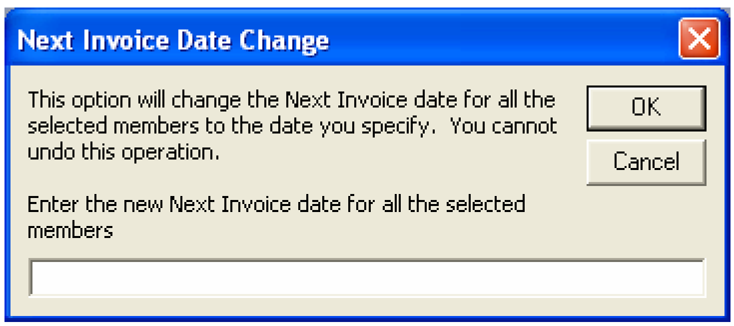
    a. Select Members – this button opens the "Selected Dues To Change" form. This form allows you to select the criteria that will filter out only the members whose dues you will be changing. You will also use this form to either add the amount you will like to increase the dues by or the percentage. Once you have selected your criteria and made the changes for the dues amount increase, click the "Ok" button.



b. Print – click this button to either Preview, Print or Email the Dues change list that you are about to make.

c. Update – once you have reviewed the names and dues changes you have selected previously and they are correct click the "Update" button to make the changes.

2. Change Next Invoice Dates – this button allows you to make a global change to the members you have selected from the "Select" button Next Invoice Date. Enter the new date in the form that appears. See form below. Once you have entered the new date click "Ok".



Change Database

Change Databases lets you switch which organization you are using with Approved Association, as well as create new blank Approved Association databases.

1. Data Sources:

    a. Find Data Source – the "Find Data Source" field displays the database name that you are currently connected to. It is also a dropdown list that stores other database names you may have which allows you to quickly switch between databases.

    b. Database – this text field displays the path to where the database is being stored.

2. Command Buttons:

    a. View - this is the default state of a window when it first opens. You can view information, but not make changes.

    b. Edit - click this button to edit information. By clicking this button also enables the "Browse" button which gives you the capability to locate your database and attach it to the software.

    c. Add – click the "Add" button to create a new database in the system. You can either add and existing database or create a new blank database.

    d. Delete – click the "Delete" button to remove a database from the list.

    e. Cancel – click the "Cancel" button to close the Data Source form.

3. Open Data Source Now – clicking the "Open Data Source Now" button will attach the software to the database that you have selected from the Find Data Source drop dropdown list.