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# Chapter 1: Overview

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## Association Management

For the purposes of this product guide, the goal of association management is defined as the following:

“To identify, maintain and increase an active membership base through long-term, interactive, value-added relationships.”

Approved Association is a communications and data tracking tool designed to help accomplish this goal.

### Association Membership Programs

While the term “association management” can bring to mind the mundane tasks analogous with tracking the names and addresses of members, *effective* association management is really more about promoting and communicating with groups of people who share common interests.

Today, association management is a form of one-to-one and one-to-many marketing that promotes medium to large scale memberships. It can reach out to organizations, yet treat each member individually.

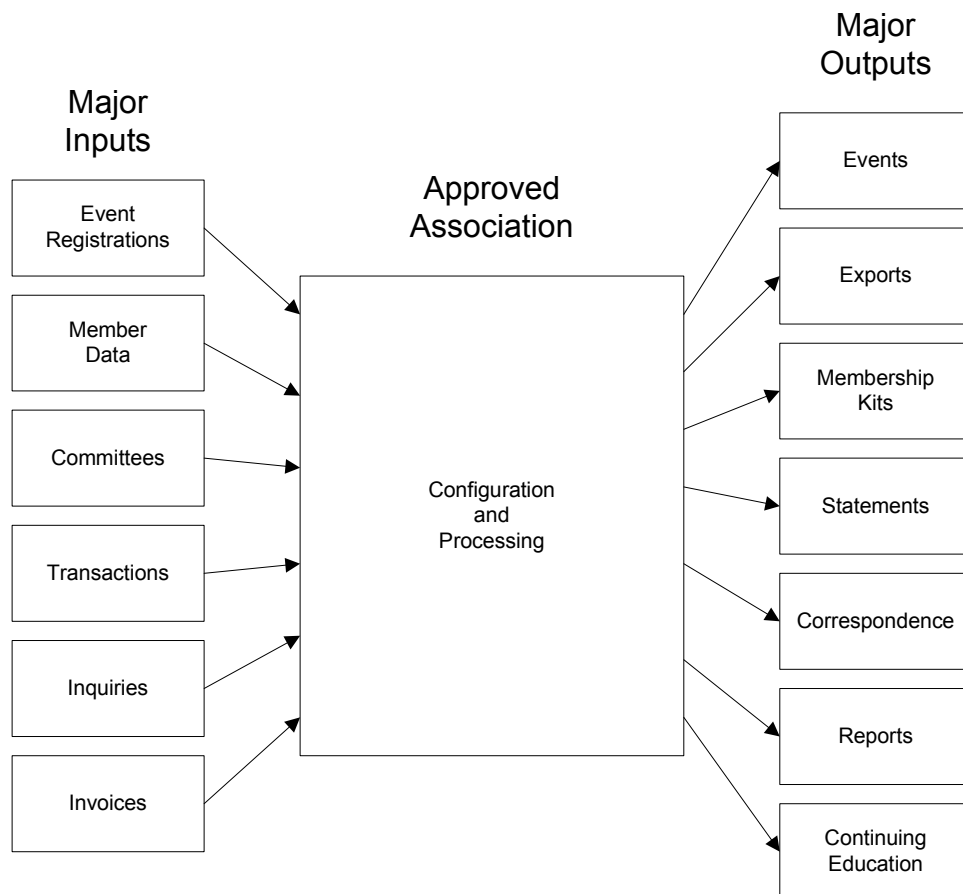
### Program Rules

Each association has rules for membership, enrollment, events, rewards, and restrictions. Each of these varies according to the client's specifications.

## Introduction

Approved Association (AA) is a Microsoft Access-based software program that is very flexible and powerful. It can handle many common strategies used for association management, including but not limited to chambers of commerce, apartment associations and individuals.

There are many elements - such as those listed below - that are important to association management. AA was developed to address the needs of managing these and other elements. By design, AA is highly configurable to meet the diverse requirements of various management programs. The following diagram provides a broad overview of the elements and processes involved:



The AA program was designed to be configurable to meet the needs of different Associations. Therefore the program usually does not need to be customized to meet the needs of the Assoc. However, CSE does custom work in areas where it does not meet your needs. The list below corresponds to the preceding diagram, describing many of the configuration capabilities, inputs and outputs of AA.

### **Major Inputs**

At a minimum, associations must have members and transactions. There are other input elements such as committee enrollments and member inquiries. Major inputs include the following elements:

Members: enrollment of people or businesses into AA.

Committees: sub-sets of members divided into specific groups of interest.

Transactions: input of revenue or behavior for which people or companies receive products and services.

Dues Invoice: new memberships and membership renewals

Event Registrations and Sponsorships: enrolling members for events and activities for events.

Invoices: sales invoices for merchandise or other association products.

Member Inquiries: communication from members.

### **Configuration & Processing**

There are many elements of association management that are configurable using AA. There are also many processes that take place within AA. These concepts can overlap. For instance, events are configurable both in their existence and in the process involved with event enrollment. Following are some of the configurable elements and processes that are important to association management programs, and for which AA was designed to handle:

Membership dues

Audit trails and logging

Membership filtering

Accounting data transfer

Membership directories

Enrollment tracking by source and location

Invoicing

Member segmentation (committees)

Member services

Member levels

Multi-user access

Security

Member communications

Non-member and prospect communications

### **Major Outputs**

Events: can be a single activity (e.g. a dinner party) or a group of activities.

Exports:

Membership Kits:

Statements: a mail or email statement of member activity

Correspondence: communication sent to a member that is initiated by the member or by the member's account activity.

Reports/Analysis: a substantial standard set of reports and measurement capabilities.

Continuing Education:

The Association Services Representative (ASR) plays a major role in interfacing with AA and the members to maintain proper interactions of the two. How the ASR accomplishes this goal is the subject of this product guide.

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## Chapter Summaries

The following is a brief summary of each chapter in this *Product Guide*.

### Chapter 1: Overview

This overview provides a summary of what is covered in this *Product Guide*.

### Chapter 2: System Walkthrough

*System Walkthrough* provides brief instructions on opening and closing AA, a summary of the options, and how to manipulate the system.

### Chapter 3: System Setup

*System Setup* provides detailed instructions on how to initially configure AA, and a description of optional configuration choices.

### Chapter 4: Members

*Members* describes the various forms and features that are directly associated with member accounts, and covers activities such as new enrollments, viewing current member information, filtering based on member attributes, managing committees and creating a web-based member directory.

### Chapter 5: Invoices

This chapter describes how to make entries for new memberships and for renewals. It also describes activities related to event registrations, invoicing activities, receiving payments and transferring account information to your accounting software.

### Chapter 6: Support Tables

Approved Association relies on the support tables to populate the program forms with pre-defined information. This chapter describes the purpose of each support table, where the information is used, and how to populate each support table.

### Chapter 7: More Options

The More Options category of Approved Association is for options that are accessed and/or changed less frequently, or that don't have significant impact on the program.

### Chapter 8: Preferences

The Preferences category

### Chapter 9: Reports

Approved Association provides the user with a substantial selection of pre-configured reports in five categories: Members, Persons, Invoices, Events, and System Lists. This chapter describes the reports in general terms, and offers detailed explanations for selected reports.

## **Appendix A: Windows XP Basics**

*Windows XP Basics* gives an overview of some basic Windows functions including information for opening Windows applications and some common tools for manipulating Windows-based applications. It gives the MSR a quick reference of some of the common Windows conventions and procedures.

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## Chapter Format

The information in each chapter is presented in a logical order for ease of finding the information.

Each chapter contains the following information:

- **Introduction**—gives an overview of what the chapter includes.
- **Open the Form:** explains how reach the form(s) for this chapter.
- **Form Description:** describes each part of the primary form, provides field definitions, and explains how to insert information into the fields.
- **Functions:** describes the buttons on the bottom of the primary window, including a description of any additional secondary windows and the functions they are used to perform.