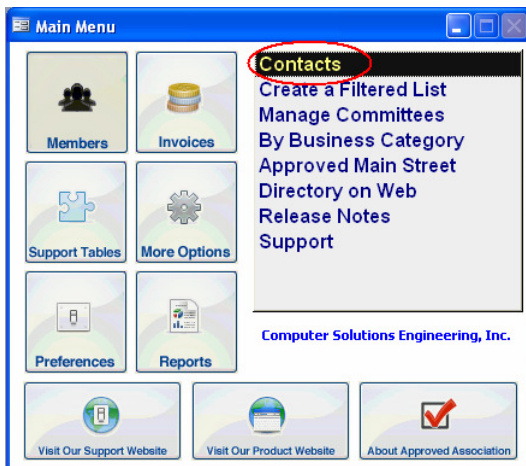


Contact vs. Companies/Representative mode

One of the initial steps when setting up your new database structure for the Approved Association Software is deciding which database mode you will be using for your organization. You are given two options: Contacts Mode and Companies Representative Mode. When making this decision, the best way to ensure that you are making the correct choice is to ask yourself how you are going to store your member information. Do you think of your members as individuals or do you think of them as companies that have multiple representatives? In some cases a person may say they think of their members from both prospective. Then the next question then is who is responsible for the dues? Who gets the invoice? If every individual is responsible for their own dues then Contacts Mode is the best route to take. If a company is responsible for all the dues then Companies Representative Mode is the best route to take.

Below are two illustrations that distinguish the first major difference within both modes:

Contact Mode:



Companies Representative Mode:



Along with the main menu there are other areas within the program that is setup differently. That is why it is very important when you contact us for technical support, that you let us know which mode you are working in. For example, when sending out

Invoices 'depending on the database mode you are in' it will show the company's name or the contact's name. If you are working in Contacts Mode the invoices that will be generated will go out to each individual under contacts that you are invoicing. However if you are working in Companies Representative Mode one invoice will be sent out per company.

Another example would be the person information screen (companies rep. mode), and contact information screen (contacts only mode). Both screens deal with member information. However, the way it is structured is completely different. In Companies & Representative Mode, you are entering a contact's information as a representative of a company. In Companies Representative Mode, the contacts information is generally tied to a company. The contact is linked to their company. Company information in Contacts Only Mode is information only.

The next release of The Approved Association Guide will cover this topic in more detail.