

Ron Oimoen

WWW.PSTCORP.COM

Welcome and thank you for trying the *Association Manager MS Access database* program for membership organizations like Associations and Clubs. Our email is rono@pstcorp.com and phone is **352-258-2594**.

For support, the office is staffed from 8-5 PM Monday through Friday Eastern Standard Time. Your purchase includes assistance with getting the program installed/running on a single PC. Ron also offers low cost annual phone and/or email support that also includes:

- Import of Equipment/Inventory/Vendors information
- Add Logo
- Training as needed
- Responses to your phone/email questions/problems, if not immediately, we average within 2 hours we will return your email/phone.
- Once click Off site data backups, if ftp transfers are allowed.

To view our Standard Costs for Support and other services, visit:

<https://pstcorp.com/remotecconnect.html>

Regardless whether you opt for our support, we would appreciate any feedback on the program, email us at rono@pstcorp.com . We use this data to continually improve and update the program.

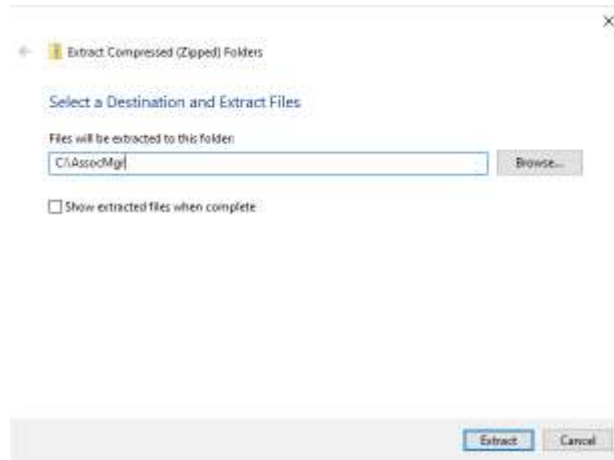
Association Manager Install

Should you need assistance with installation please email us at rono@pstcorp.com . You may need to allow us to remote connect to your computer remotely for this assistance. We currently use Distant Desktop for this and can email you instructions. It is simple one file .exe needed to remote connect. English only please. Ron also provides full design versions of our database applications. If you would like a procedure to convert to an .accd just perform a save and publish function.

1. If you do NOT have MS Access, Click the link on our website to download MS Access Runtime <https://www.fmsinc.com/MicrosoftAccess/runtime/index.htm> . The link will take you to a site offering free downloads of a variety of MS Access Runtime versions. There are both 32 bit and 64 bit versions; the AssocMgrInstallFiles.zip file contains applications for both versions.
2. You can download AssocMgrFiles.zip which is the one to use to install by unzipping or you can Download AssocMgrInstallFile.zip that contains an .exe file to install to C:\AssocMgr and provide an option for a shortcut and open the program when complete, then go to the NOTE just before step 10. For those that prefer unzipping manually, use the AssocMgrFiles .zip file and continue.
3. Right Click the AssocMgrfiles.zip file and select "Extract All"

4. Change the path where you will unzip the files to C:\AssocMgr (you can turn off show extracted files when complete), then click Extract at the bottom, the form will look like this:

NOTE: Never Repeat the Extraction after you have started Data Entry. It will overwrite any existing data. Now you can unzip to a different location like C:\AssocMgr\COPY if you just want some refreshed files like the application or support files and copy/replace then in the C:/AssocMgr folder. **Never** copy/replace the **AssocMgrdata.mdb** file.



5. Now go to C:\ AssocMgr folder and find the file AssocMgr.accdb (for MS Access 32 bit) or C:\ AssocMgr \64bit and find the file AssocMgr.accdb (for MS Access Runtime 64 bit). Right Click the file and select Copy.
6. Go to your desktop and Right Click an empty space and select Paste Shortcut, NOT just Paste but Paste Shortcut.
7. You may right click the new shortcut and rename if desired.
8. IF you installed MS Access Runtime go to the C:\ AssocMgr folder and run the AddPath.exe if you installed Runtime 2007, OR for other versions run that AddPath file. Note AddPath2016.exe is for both Runtime 2016 and above.
9. Open the new shortcut just created.

NOTE: IF you receive a message that the database was created with a 32 bit version, this means you have Office 64 bit, go to C:\ AssocMgr \64bit and use AssocMgr.accdb in place of C:\ AssocMgr \ AssocMgr.accdb in step 4-7 above.

IF you receive an open warning click OK to open, then C:\ AssocMgr must be set as a trusted location (step 10-19), in the event you did not do step 8 or perhaps did the wrong one.

10. The AssocMgr Log on form will load, **IF you did NOT** install Runtime and have the full version of MS Access. Then follow this **ONE TIME** procedure to set C:\ AssocMgr folder as a trusted location.

Setting Trusted Locations for MS Access:

11. For Access 2007, click the Microsoft office icon in the upper left, then click Access options
For Access 2010/2013/2016/2019 and above, click File, and then click Options
12. Click Trust Center on the left
13. Click Trust Center Settings on the right
14. Click Trusted Locations on the left
15. Click Add new Location near the bottom right
16. Type in the path or copy paste this --- C:\ AssocMgr
17. Check the box labeled "Subfolders of this location are also trusted"
18. Click OK
19. Click OK, Click OK
20. Close MS Access
21. Reopen the program via the shortcut created in step 8
22. Click Auto Login to open the main menu or if you prefer: the user ID is "Admin"----Press **Enter** on your keyboard.
23. The user password is "Super",-----Press **Enter**

NOTE: If you want to remove the program from your PC, simply delete the entire C:\ AssocMgr folder. There will also be command buttons to open the Reference Guide to assist in setting up and using the program.

24. The Main Menu will load. Here is a quick getting started guide:

NOTE: Ron offers data import services, should you desire to avoid data entry time and have your data in an electronic format, contact us at rono@pstcorp.com for a low cost quote. Most data imports can be completed for less than \$50.00 and is included should you decide purchase 1 year of support.

- Click the "Businesses" button on the main menu, enter your business contacts basic information here, you can then add your individual contacts by clicking the "Individuals" button on the main menu and assigning them if needed to the businesses just added. Be sure to check the "Member" checkbox if they are a member so dues can be assigned later with critical information setup.
- Click the "Org/Program Setup" button on the main menu, enter your Organizations information then click the setup checklist. Go thru each button to setup items for drop down lists such as Member Dues and other fees, etc.
- Add Financial Accounts and add/edit chart of accounts provided
- Add your categories to assign to your contacts
- Set Member Critical Information such as assigning dues and descriptions information and next add who will use the program (log on id/password)
- All other functions are options, such as inventory and equipment

You can now use the other functions with the Quick Reference Guide to go thru the program.

Regards,

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