

Managing Your Agency

Procedure/Function	Where Accomplished	How Accomplished
Setting System Security	"Users" module in Maintenance Area	Single click on MAINTENANCE then USERS and enter your employees one-by-one. Give each employee a password. Access the USER RIGHTS tab for each employee and set their access rights to your liking. Each area can be set at three different levels of access depending upon your desires as the system administrator.
Running Reports	Reports Module	Access Reports module. Select the module you wish to search on to generate your report then choose the report you wish to generate (a listing of the majority of reports can be found in appendix A of the system manual). Finally, create and run your query or run the report with no query then print.
Using the Address Book	Address Book Manager	Single click UTILITIES then ADDRESS BOOK. Enter your new individuals or businesses in the PERSONAL or "ALL" (non personal) address book.
Printing Documents	Word Manager	Access word manager and single click FILE then either ADD a NEW document or LOAD a previously created merge or non-merge document. Once created or loaded, single click Print Merge Document or Print Document (if non-merge document). You may print a single document for a single record (if that record is displayed in its module) or you may print a mass mailing through the use of a query.