

Announcing...

Rapattoni *Magic* Version 8.18.02

Rapattoni Corporation is pleased to announce the newest release of *Rapattoni Magic*. Following are just a few of the new features and changes. Please see the attached Release Notes for a complete, detailed list of improvements and new features.



Highlights

- **Reviewing Data Exchange Results Made Easier**

A new status of "C," for Collected/Not Sent, has been added to data exchange. Records will be flagged as "C" if they have been successfully collected for transmittal in a batch, but the batch file was not transmitted (sent) via the Internet to the receiver. The new status displays through the Transmittal Detail Form and the Transmittal Reports.

- **IMS – Online Policy Agreements**

You may now require new users to agree to a policy (e.g., a privacy policy) when they sign up for membership through Internet Member Services. This allows you to be sure members have viewed your association's policy before they logon.

- **IMS Setup Forms – Easier to View**

To make setting up the details and preferences of your IMS Membership easier, some forms have been reorganized. From the 'Internet Member Services Setup Form' you will now notice the 'IMS Preferences Setup' and 'New Account Setup' buttons; previously these were under one button called 'Membership Detail Setup'.

- **IMS – Provide Your Members with Access to ZipForm**

If your members use ZipForm (the official forms software of the National Association Realtors®) you can now provide them with a convenient link to this service right from your Internet Member Services site. The link will seamlessly log the agent into ZipForm. To view their Web page, go to <http://www.zipform.com>.

- **Multiple Bank Accounts for E-Commerce**

In accordance with NAR's E-Commerce specifications, you now have the ability to incorporate multiple bank accounts for credit card processing.

- **Accounting – Credit Card Processing Improved**

The software has been enhanced to prevent accidentally double-billing a member's credit card (applies only to associations using NAR credit card processing). In addition, error messages (such as 'Card Not Validated') have been improved to be more informative for your staff.

- **Creating New Classes and Events is Easier Than Ever**

A new button, "Copy Class/Event," has been added to both the Class Information Form and the Event Information Form. You can use this button to automatically create new classes and events based on the information in existing classes and events. Click the button and you will be prompted to enter a new Class/Event ID and name; the software then copies the current class/event including the Rate Table, Speakers and IMS Options.

- **And More...**

In addition to the items listed above, look for changes in the following areas:

- ▶ Accounting
- ▶ Contributions
- ▶ Education & Event
- ▶ Membership

Our focus is on delivering the best association management software on the market. We value our customers, and sincerely hope you and your staff enjoy all the new features of *Rapattoni Magic* 8.18.02.

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Type	Name	Description
Programs - IMS		
Internet Member Services		
	Display the Invoice,Send Email	Internet Member Services - When members pay a registration invoice (or create one by charging to their account), the invoice now displays the class, event or convention ID that it was generated for.
	Display the Receipt,Send Email	Internet Member Services - When members pay a registration invoice the receipt now displays the class, event or convention ID that it was generated for.
	IMS Agent Notices	Selecting a specific member when sending a notice - A new link, "Select a Member" now displays on this page. Click the link to locate the member you wish to send a notice to, and the software automatically enters the member into the form.
	IMS Broadcast Notice History	A new pull-down menu has been added. Select "Broadcast Notices" to view messages that were sent to everyone. Select "Notices you've Created" to view all messages you created (i.e., by your Login ID).
	IMS Class Detail	Course Credits now display next to Course Type.
	IMS Class Detail	Members viewing the class through IMS can now see the Number of Available Spaces left in the class from this screen.
	IMS Class Registration	A status indicator has been added to the class registration screen indicating whether the class is OPEN or FULL. The registration buttons are automatically removed if the class is FULL.
	IMS Class Registration	Members viewing the class through IMS can now see the Number of Available Spaces left in the class from this screen.
	IMS Committee Detail	The software has been changed to use the meeting date, rather than the system date, in order to determine who is eligible to display based on the committee member's dates on committee. This was done for greater accuracy.
	IMS Course List	The Course Credits are now displayed on this screen.
	IMS Credit Card Info	Add New Charge Card - the check box "Set as my default credit card" now defaults to checked, so when members enter a new credit card for their transaction this credit card will be the selected one for the transaction (unless they uncheck the box).
	IMS Event Detail	Members viewing the event through IMS can now see the Number of Available Spaces left in the event from this screen.
	IMS Event Registration	A status indicator has been added to the event registration screen indicating whether the event is OPEN or FULL. The registration buttons are automatically removed if the event is FULL.
	IMS Event Registration	Members viewing the event through IMS can now see the Number of Available Spaces left in the event from this screen.
	IMS Member Login	IMS - Events and Conventions have been added to the list of items you can link to from outside of IMS. For example, you can promote a specific event or convention by creating a link to the IMS registration form on your own Website.
	IMS Member Personal Info	A new field has been added to the Preferences section. "Preferred Publication(NRDS)" allows members to indicate where they would prefer to receive correspondence from NAR.
	IMS View Account	Modified program so that invoices with a future date do not display in IMS. This prevents members from attempting to pay invoices prior to the invoice date.
	Processing Verisign PayFloPro	Modified Verisign processing to include Address verification for credit cards using street and zip code (it was already in the logic for Telecheck).
	Processing Verisign PayFloPro	For VeriSign users only: The Batch ID is now automatically added to the Comment 1 field. This was done to make it easier to identify transactions when reconciling in VeriSign.
Programs - Membership		
Accounting		
	ACH Payment Processing - NACHA	New selection criteria: A Multiple Status Selector has been added for Member Status. This new field allows you to process transactions only for members who have a status that you have selected.
	Cash Receipts Posting Form	Program has been modified to allow a credit amount entry, in order to allow for refunding credit cards when Verisign is the credit card processor.
	Cash Receipts Posting Form	Added the result message to the Card Validated screen for Credit Card processing.
	Cash Receipts Rpt by Chg Code	New sort options: Two new sort options are now available when running the Detailed Format Option: "By Charge Code/Name" and "By Acct/Charge Code/Name"

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Programs - Membership		
Accounting		
	Pay One Invoice	Program has been modified to allow a credit amount entry, in order to allow for refunding credit cards when Verisign is the credit card processor.
	Pay One Invoice	Added the result message to the Card Validated screen for Credit Card processing.
	Sales Invoice Form	Program has been modified to allow a credit amount entry, in order to allow for refunding credit cards when Verisign is the credit card processor.
	Sales Invoice Form	Added the result message to the Card Validated screen for Credit Card processing.
	Sales Invoice Form	You can now click the A/R button, in order to access the Cash Receipts Posting Form, immediately after selecting a Member of Office. Previously, you could not access the A/R button until you had first created an invoice from this form.
Call Tracking		
	Call Report	Call Tracking - Added member's email address to the call detail reports.
Contributions		
	Contributions Form	This program has been enhanced to automatically default the Billing Group field to match the Billing Group of the member's primary association when entering a new contribution.
	Contributions Merge Form	New selection criteria: The Contribution Type field has been added to this merge program.
	Contributions Merge Form	It is now possible to include anyone who made a contribution matching your criteria, even if they do not have an association record that matches the contribution. Simply select All member statuses, and every qualifying contribution record will be included.
Convention		
	Convention Education Merge	Added grade selection to the program. You can now specify a grade for more specific selection of attendees.
	Convention Education Merge	New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.
	Convention Event Merge Form	New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.
	Convention Merge Form	New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.
	Non-Contributor Merge Form	New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.
	Pledge Merge Form	New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.
Credit Card Processing		
	Credit Card Payment Processing	New selection criteria: A Multiple Status Selector has been added for Member Status. This new field allows you to process transactions only for members who have a status that you have selected.
	NRDS/VeriSign CC Authorization	Modified Verisign processing to include Address verification for credit cards using street and zip code (it was already in the logic for Telecheck).
	NRDS/VeriSign CC Authorization	It is now easier to recover when problems occur during NRDS credit card processing. All related accounting programs now take automatic steps to make recovery easier. The Credit Card Log now has a new Create Receipt button that will create the appropriate receipt entries that would have been made had the transaction completed in the receipt or credit program.
Data Exchange		
	Receiver Information Form	A new checkbox for "Send Social Security Number" has been added to the Settings Tab. This new field allows you to control whether or not social security numbers are included in your transmittals. This new field must be checked in order for SSNs to be sent.
Education		
	Class Registration Report	Added an option to print the registration comment.
	Class Sign-In Sheet	New option added - you can print a sign-in sheet for those on the waiting list in order of priority.

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Type	Name	Description
Programs - Membership		
Education		
	Course Query Form	A new field, "Course Formal Name" has been added to the system. You can type the Course Formal Name, which allows up to 100 characters, into the Course Information Form. The new field also displays on the Course Query Form.
	Courses Needed Merge Form	New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.
	Education Card Merge Form	New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.
	Education History Report	'Office #' has been added as selection criteria for the 'By Member' report option. This allows you to run the report for all members in a specific office, if desired.
	Education Merge Form	New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.
	Education Tracking Merge Form	New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.
	Education Tracking Merge Form	Added multi-selector for Association. Also added an include duplicates option, which is necessary if the member qualifies in more than one association. If the member has more than one association record that qualifies and include duplicates is chosen, the merge file will contain the association where the member qualifies. If include duplicates is not selected, the member's primary association will display in the merge file, which may not be the one where the member qualifies.
	Education Tracking Report	New Sort Options - A Sort Option field has been added to this report. Previously the report automatically sorted by Member. You now have three sort options: By Member Name, By Office Sort Sequence and By Office/Page Per Office. New Selection Criteria - "Association" and "Member Status" have both been added to this form. The Member Status field is a Multiple Selector Form, allowing you to select any combination of status(es) desired. New Checkbox "Include Members without Registrations" - This new field allows you to print results for members who have Education Tracking requirements in their record, but have no class registration records. New Totals at a Glance - You can now see the total number of members who are still Pending and who have Completed their education tracking requirements at the end of the report.
	Education Tracking Update	You can now enter a date next to the "Last Class Completed Thru" field. This will prevent tracking records from being updated when registrations exist for a future class and the attended status has already been set to 'Y' with a passing grade.
Event		
	Event Information Form	Changed form so that the user cannot change the convention ID.
	Event Information Form	New button - "Copy Event" You can use this button to create a new event using the information from the current event, including a Rate Table, Speakers and IMS Options. Note: It will still be necessary to update some fields for the new event, such as Dates, Location, Number of Attendees, Meals and Table Information.
	Event Merge Form	New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.
	Event Registration Report	Format Option 6 - By Event/Office/Member - the report will now print the Company Name from the Supplemental Record if one exists and if Supplemental is chosen for the preferred mailing address.
	Event Sign-In Sheet	New option added - you can print a sign-in sheet for those on the waiting list in order of priority.
	Laser Tickets	The registrants Table and Meal Choice now print in a bold font.

Internet Member Services

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Type	Name	Description
Programs - Membership		
Internet Member Services		
	IMS Setup Form	<p>From the 'Internet Member Services Setup Form' you will now notice the 'IMS Preferences Setup' and 'New Account Setup' buttons; previously the setup fields contained in these two areas were condensed under one button called 'Membership Detail Setup'. These items have been reorganized to make setting up the details and preferences of your IMS membership easier.</p> <p>New Policy Acknowledgement Features: From the New Account Setup Form you can now specify that new IMS users must acknowledge that they've read your association's policy (i.e., Privacy Policy) before accessing the IMS site. In addition you can use the Acknowledgement Label field to customize their acknowledgement (for example, "I have read and understand the Public Privacy Policy")</p>
Inventory		
	Purchase Order Query Form	<p>A button has been added for Transfer Items. This will automatically create a new PO for a different billing group with the opposite quantities of the Purchase Order selected, and is used for transferring inventory items between cost centers (billing groups).</p>
Lock Box Key		
	Key Information Form	<p>Member Number has been added to this form. This allows you to simply change the key information for this member, which does not create a new history record.</p>
	Key Query Form	<p>Three new buttons have been added to the bottom of this form.</p> <ol style="list-style-type: none">1. "Modify Key Record" opens the highlighted record in Modify Mode. You can then modify any information in the record.2. "Assign New Key to Member" opens a new record for the member number displayed in the highlighted record. You can then add new key information for the member.3. "Assign New Member to Key" opens a new record for the key number displayed in the highlighted record. You can then assign a new member to the selected key.
Membership		
	Delete Members by Status Date	<p>Added an option to delete related documents for members being deleted.</p>
	District Merge Form	<p>New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.</p>
	Member Information Form	<p>Deleting a member - Documents attached to the member record will now also be deleted from the system.</p>
	Member Information Form	<p>Preferences - The "Allow unsolicited fax" checkbox will now automatically revert to unchecked if the member's Personal Fax Number is modified. This was done to accommodate new law, which states that correspondence should not be sent to a fax number unless the member has given consent.</p>
	Member Information Form	<p>New Member Invoices - You can now pay/create a receipt for new membership invoices automatically when adding a new member. The Cash Receipts Posting Form automatically displays with the new members information. If you do not wish to pay the invoice at that time simply press Esc.</p>
	Member Information Form	<p>This program now utilizes a new right (View Last 4 SS#). The last 4 digits of the member's social security number will display if the user has the appropriate right.</p>
	Member List Form by List	<p>This program has been enhanced to display the names of members on a list in alphabetical order. This will make it visually easier to locate a specific member on a list.</p>
	Member List Maker Merge Form	<p>New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.</p>
	Member Query Form	<p>This program now utilizes a new right (View Last 4 SS#). The last 4 digits of the member's social security number will display if the user has the appropriate right.</p>
	Merge Output	<p>Two data fields have been added output file of the Government Affairs Merge - 'Legislator E-mail' and 'Legislator Web Page'.</p>
	Merge Output	<p>Increased size of Office Phone and Home Phone from 14 to 22 to accommodate phone extension in the legislator merge. Also increased the Legislator Primary Phone from 14 to 22 to accommodate the extension in the government affairs merge.</p>
	Merge Output	<p>New fields have been added to the general member merge output file: "Gender", "Join Date", "Orientation Date" and "Generation"</p>

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Programs - Membership

Membership

Merge Output	New fields have been added to the Education Merge output file: "Course Type Description" and "Course Formal Name."
New Member Form-Event/Ed/Conv	Deleting a member - Documents attached to the member record will now also be deleted from the system.
Office List Form by List	This program has been enhanced to display the names of offices on a list in alphabetical order. This will make it visually easier to locate a specific office on a list.
Office List Maker Merge Form	New criteria fields have been added: Unsolicited Mail, Unsolicited Fax and Unsolicited Email. These new fields increase your ability to send correspondence only to members who desire to receive it.
Office Merge Form	The "Office Type" criteria field has been updated to a Multiple Selector Form. Previously you could choose up to 5 Office Types for this merge. The Multiple Selector Form allows you to select any number and combination of types desired for your merge.
Related Records Report	Added Documents to the related records report.