

Rapattoni Magic Maintenance Report

v9.28.15

Rapattoni Magic 9.28.15 is here! This exciting new version gives your association access to several enhancements as well a number of maintenance updates. Please note that this report may not be a complete list and that items affecting only one Magic customer may not be included.

The following items have been implemented in version 9.28.15. Please call Rapattoni at (800) 722-7338 to schedule your upgrade and begin enjoying the many benefits of Rapattoni Magic 9.28.15.

Internet Member Services

IMS New Member/Non-Member Form

The NAR Email address had an incorrect label which allowed this field to be left blank when it was marked as 'Required.' Changed the name in the merge form to NAR_Email_Address and the form now works correctly. It will now generate an error message if NAR email is left blank and return focus to the field.

IMS New Member/Non-Member Form

Moved Gender display to the personal information section just above Birthdate. Previously, it was erroneously located after the Nickname. Also added IF tags around Gender so that if the display of Gender was switched to 'Inactive' it would not appear on the form.

IMS Personal Information Form

When the Home Address setting was set to 'Inactive' and the user made any change on the form, a ZIP Code and/or Invalid State error was displaying. This has been corrected.

Accounting

Transfer Member Invoice Utility

Added a check to ensure that the balance due is not zero when selecting invoices to be transferred to a member's new office. Before this correction, any zero invoices created (dues split, write-off) were transferred to the new office even though they should not have qualified.

Cash Receipts Posting Form

When processing payments using the cash receipts posting form for suspended members and the 'update status' settings were active, in certain scenarios where multiple statuses were to be activated, a locking occurred. In some cases the status would fail to be updated to active. This has now been corrected.

Transmittals

Generate Education Transmittal

Changed the 'Class Completion Date' label to 'Class End Date' on the criteria form. The previous label was causing confusion regarding what date the selection criteria was using.

Create transmittal – Files

Supplemental files were not getting transmitted when there were no qualifying member or office records. Added a count of member and office secondary records to use in criteria when creating the transmittal file.

Format Office MLS V6 and V7

When setup was used for member IDs, the program was looking up the Responsible Member & Office Manager IDs in the office table and not the member table. This is now corrected.

Central Data Base

CDB Query Forms

Form was displaying an Association Mismatch Error for non-active Member/Office. The Member/Office will now not be considered for CDB communication when not active.

Get from CDB

Program was setting the Main Office to 0 when downloading from CDB if the Main Office had a 0 prefix or if office didn't exist. The Main Office will now remain unchanged if it does not exist locally.

Member/Office Information Form

Program was doing a Get from CDB when going to the Member/Office Information Form even though the Real Time Update option was turned off due to a different setup parameter. This is now fixed and no real time update will occur in this scenario.

Push to CDB (States Only)

States were sending changes to the CDB based on an association parameter. This parameter has been corrected so it can be set to send changes for the non-association part of the record or not send any changes at all. Changes from the CDB for states will all be taken into account regardless of the association setting.

Get from CDB (Adds only)

For customers choosing to add Members/Offices from the CDB (mostly states), a duplicate key error was displayed when creating a Member or Office with a 0 prefix in the NRDS ID (less than 9 digits). This has been resolved.

Transfer Issues

Some transfers were not being sent to the CDB when an error occurred. This has been resolved by using new logic for transfers independent of the changes uploaded. In addition, when a member/office has been marked for transfer, a "Transfer Pending" label is displayed in the CDB Query Forms until the transfer is successful.



Enhancements

Purge CDB Log

The log kept for the CDB will now be purged automatically to speed up the CDB forms and reduce the load on the SQL server.

CDB Query Forms - Sync Attempts

Magic will stop attempting to Sync to CDB when five attempts have been reached. The attempts counter is reset when any change is made to the record. When manually trying to Push to CDB, an error message will be displayed.

CDB Downloads

Magic now allows emptying the CDB Download Queue without updating the local DB. All customers should have a CDB Download Queue (Pub Sub Queue) event set up in the scheduler and set 'Update Local Data with Pub Sub Queue' to Off if they don't want their data updated from NAR to avoid filling up the CDB servers and avoid potential crashes.

Sync Members to CDB by Billing Type instead of Member Type

A new feature was added to use Billing Type instead of Member Type when selecting data to send to NAR. For existing customers, after the upgrade process, Billing Types should be selected to replace the existing Member Types. For new customers, Billing Type must be used.

Member/Office CDB Query Forms

Select Errors Only/All from radio buttons directly (instead of button)

A horizontal control bar containing two radio buttons. The first radio button is unselected and is followed by the text "Errors Only (10)". The second radio button is selected and is followed by the text "All".

When entering the form, the errors display first by default; if there are no errors, it will display a message and switch to View All.

Added Exclude check box (user can range on it to view all excluded records).

A control element consisting of a small square checkbox on the left, which is currently unchecked. To its right is a rectangular button with the text "Exclude" inside.

Exclude button (label changes to "Include" if Exclude is checked) allows users to exclude Member/Office from being synced with CDB.

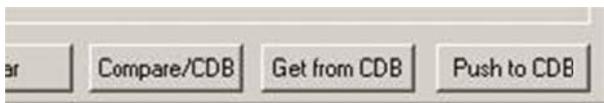
WARNING: This will exclude the record until manually re-included.

This is displayed in the CDB Download Forms but cannot be set.

Clear button clears error and resets Update Required to N, sync attempts/date & time (one time).

A horizontal row of three buttons. From left to right: "Exclude", "Clear", and "Compare/CDB".

"Download" label changed to "Get" and "Upload" changed to "Push."

A horizontal row of three buttons. From left to right: "Compare/CDB", "Get from CDB", and "Push to CDB".

Displays "Transfer Pending" if relevant.

A status bar with a light gray background. On the left, the text "CDB Status" is displayed in blue. Below it, "Error from Sync Attempt" is displayed in blue. On the right side, "Transfer Pending" is displayed in red.

New Tool to Sync Members/Offices with CDB

Rapattoni Staff now has a tool to mass select which members and offices need to be synced with the CDB (Push or Get) by Association, Bill or Member Type, Office Type and Status. This tool will be made available to staff in a future version (equivalent to the current data exchange options for sending a full transmittal to NAR or retrieving a batch refresh from NAR).

