

# Announcing...

## Rapattoni *Magic* Version 8.24 (NOW AVAILABLE)

Rapattoni Corporation is proud to announce the release of Rapattoni *Magic* version 8.24. Following are just a few of the exciting new features. Please see the attached Release Notes for a complete list of new features and changes.



### Highlights

#### ■ Updated System Platform

- *Magic's* underlying platform has been updated to take advantage of improved technology and provide better performance and reliability.
- Open frequently used programs with a single click! The toolbar now features buttons that let you access the following forms without navigating through the menus: Member Query, Office Query, Sales Invoice, Cash Receipts Posting, Class Registration, and Event Registration. In addition, all of the toolbar buttons have a fresh new look!

#### ■ Internet Member Services

- The IMS Personal Information page, as well as the online membership and public account applications, can now be customized for your association. Remove unwanted fields, rearrange fields, rename subheadings or create new subheadings to organize these pages in the way that best suits your association's needs. Contact Rapattoni *Magic* Support if you would like to customize these IMS pages.
- Members that have more than one license can now conveniently add additional license information on the Personal Information page in IMS by selecting the new "Add a new license" link. Contact Rapattoni Magic Support if you do not want this link to display.
- You can now allow your members to access IMS from a Security Assertion Markup Language (SAML) compliant site, such as the Rapattoni MLS, without logging on separately. Users will appreciate the increased convenience of Single Sign-On (SSO).

#### ■ Contributions

- The new "Check Date" field on the Contributions Form lets you keep track of the date that each contribution check was written. Used in conjunction with the Contribution Form's Date field, which represents the date each contribution was received, this new field provides you with more complete contributions information. In addition, the Check Date is now available in the merge data file when you run a Contribution Merge.

#### ■ Inventory

- The Inventory Activity Report can now be run based on Charge Code Status. Using convenient new radio buttons, you can select all active charge codes or all inactive charge codes. As before, the default selection automatically includes all charge codes, regardless of their status.

#### ■ Data Exchange

- You can now select any single status (such as Pending or Suspended) to check when comparing records in your database against records at NRDS. Click the new "Other" radio button in the Status Selection area to choose a desired status. Previously, this utility could be run for "All Statuses" or "Active Only."

#### ■ Education, Event and Convention

- A unique member ID now prints next to each member's name on the Event Sign-In Sheet. The new "ID Option" field lets you choose from License Number, Member Number, MLS ID or NRDS ID.
- The Class Roster and Convention Class Roster now include non-member registrants. Therefore, if you allow non-members to register for classes, all registrants are included on the roster so that you have a complete list of people planning to attend each class.

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* 8.24.

# Rapattoni Magic Release Notes

Report run on 05/09/07 at 15:06

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| Type                            | Name                           | Description  |
|---------------------------------|--------------------------------|--|
| <b>Programs - IMS</b>           |                                |  |
| <b>Internet Member Services</b> |                                |  |
|                                 | Display the Receipt,Send Email | A receipt will now be e-mailed to members who sign up for free events and/or classes in IMS. This receipt will provide registrants with important information regarding the events and/or classes selected.  |
|                                 | IMS Agent Office Search        | The "Primary Field of Business" drop-down menu items now sort in alphabetical order from the Find Members/Offices page in IMS. This makes it easier for users to locate and select a specific Field of Business.   |
|                                 | IMS Member Personal Info       | The IMS Personal Information page, as well as the online membership and public account applications, can now be customized for your association. Remove unwanted fields, rearrange fields, rename subheadings or create new subheadings to organize these pages in the way that best suits your association's needs.<br><br>In addition, you may now choose to allow your members to modify any of the following fields: Title, First Name, Middle Initial, Last Name, Generation, Gender, Birth Date, Primary License #, Expiration Date, License Type.<br><br>Contact Rapattoni Magic Support if you would like to implement any of these changes. |
|                                 | IMS Payment Info               | For additional security, the display format of credit card numbers has been changed so that only the last four digits of the member's credit card number can be viewed. This change has been made everywhere that credit card numbers display in IMS. Previously, the first two digits displayed in addition to the last four digits.  |
|                                 | IMS View Account               | Brokers can now see whether their office members' status is Active or Inactive from IMS.   |
|                                 | IMSAdditionalLicense           | Members that have more than one license can now conveniently add additional license information on the Personal Information page in IMS by selecting the new "Add a new license" link. NOTE: If your association does not want this link to display, contact Rapattoni Magic Support.  |
| <b>Programs - Membership</b>    |                                |  |
| <b>Committee</b>                |                                |  |
|                                 | Committee Sign-In Sheet        | The Committee Sign-In Sheet form now includes members in the committee regardless of whether they are active in the association. Previously, the sign-in sheet did not include committee members with an inactive Association Status.  |
| <b>Contributions</b>            |                                |  |
|                                 | Contributions Form             | You can now track contribution check dates in the Contributions Form using the new "Check Date" field.   |
| <b>Convention</b>               |                                |  |
|                                 | Convention Class Roster        | The Convention Class Roster now includes non-member registrants.   |
| <b>Data Exchange</b>            |                                |  |
|                                 | NRDS Verification Utility      | You can now select any single status (such as Pending or Suspended) to check when comparing records in your database against records at NRDS. Click the new "Other" radio button in the Status Selection area to choose a desired status. Previously, this utility could be run for "All Statuses" or "Active Only."   |
| <b>Education</b>                |                                |  |
|                                 | Class Information Form         | The Class ID field no longer accepts codes containing special characters such as #, -, @, and so forth. This is necessary to ensure that class links work properly in IMS.   |
|                                 | Class Roster                   | The Education Class Roster now includes non-member registrants.  |
|                                 | Education Merge Form           | If your association encrypts Social Security numbers (available with version 8.21 and higher), the Education Merge now allows users with the appropriate access rights to include decrypted Social Security numbers in the merge data file, if necessary. Authorized users can select the new "Include Social Security #" check box field at the bottom of the Education Merge Form.   |
| <b>Event</b>                    |                                |  |
|                                 | Event Information Form         | The Event ID field no longer accepts codes containing special characters such as #, -, @, and so forth. This is necessary to ensure that event links work properly in IMS.   |
|                                 | Event Sign-In Sheet            | A unique member ID now prints next to each member's name on the Event Sign-In Sheet. The new "ID Option" field lets you choose from License Number, Member Number, MLS ID or NRDS ID.  |
| <b>Internet Member Services</b> |                                |  |
|                                 | IMS Registration Grp Mandatory | This new form enables you to select a mandatory class or event for an IMS registration group. This is useful when your association wants members to attend a specific class or event in an established registration group.   |
| <b>Inventory</b>                |                                |  |
|                                 | Inventory Activity Report      | The Inventory Activity Report can now be run based on Charge Code Status. Using convenient new radio buttons, you can select all active charge codes or all inactive charge codes. As before, the default selection automatically includes all charge codes, regardless of their status.   |

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## Programs - Membership

### Membership

- |                             |   |
|-----------------------------|---|
| Member Report - Main Office | The Member Report - Main Office now includes a subtotal of members in each branch office. To include this new subtotal on the report, you must choose Format Option "1" and Sort Option "3" when entering your report criteria. |
| Merge Output                | New data field added to merge output file: "Contrib Check Date" has been added to the Contribution Merge.   |
| Print Membership Cards      | Membership cards now display members' middle initials in addition to their first and last names.  |

### Other Transmittals

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|----------------------|--|
| Client Query Form    | You can now print transmittal client rules using the new Print Rules button when you access the Client Rules Form from the Client Information Form. Note that the Client Information Form is accessed from the Transmittals manager. |
| Data Export Programs | The Web Page Data Export Programs form has been renamed Data Export Programs.  |