F. A. Q.

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Frequently Asked Questions

for

Rakefet Synagogue Software

F. A. Q.

F. A. Q.

F. A. Q.

F. A. Q.

Table of Contents

Mailing:

Miscellaneous:

F. A. Q.

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F. A. Q. for Rakefet Synagogue Software was created especially for Rakefet users from actual Rakefet users' *frequently asked questions*:

Receivables:

Q: What is the difference between a donation and a payment?

A: There are two kinds of cash payments you can receive from someone in your database. A *payment* is money received from a congregant in response to a preexisting charge, like dues. The charge made his balance go up; the payment makes it go down. A *donation* does not affect the balance at all. You can think of it as a charge and a payment all in one. This has nothing to do with tax deductibility--it can be a donation to the library fund or admission for three to the Purim party. When you are creating your Chart of Accounts, you can block certain accounts, like Dues or Tuition, from receiving Donations, since they always have Charges followed by Payments.

Q: What if I get a small donation from an out-of-town guest?

A: If you do not need to keep a separate record of the payments received from this source and do not need to provide a receipt, then the payment can be entered directly into the general ledger. Type in the date, the amount, the income account. You can write the donor's name in the memo field. This transaction will show up in all general ledger and bank account reports but it will not appear in Receivables reports since it was not entered through someone's account. N.B. It is *not* a good idea to create an imaginary family called Mr. and Mrs. Miscellaneous.

Q: When someone gives me a single check for their dues and their Sisterhood membership, what do I do? Sisterhood has its own bank account.

A: Two possibilities:

1) If you are relatively successful in training your membership not to do this, just set up an exchange account, (e.g., 999999), associated with the main bank account, for occasional situations like this. Enter their dues payment in their account, and then go to the General Ledger and log in the Sisterhood money to 999999. Then write a check out of 999999 to the Sisterhood, and either give it to the Sisterhood president or log it in to the member's account using the correct account number.

2) If this is an everyday occurrence, just make the first stop of all money be your operating bank account, and link all the income accounts to it in your Chart of Accounts. At the end of the month, see how much Sisterhood, Youth, Endowment, and Rabbi's Discretionary money you have collected and make the appropriate bank transfers, documenting them in a journal entry which credits the operating account and debits the appropriate auxiliary bank account.

Note: Do not debit your income account.

Q: We bill dues to our members by different demographic groupings. Will I have to bill each member one at a time?

A: No. You can create Family Codes based on the different demographic groupings: Family, Single Parent, Single, Senior Couple, and Single Senior, and then filter for each group and make Mass Assessments for each group. For further information Search Help for *Family Codes* and *Mass Assessments*.

Q: Our congregants have the choice of being billed annually, semi-annually, quarterly or monthly. Do I have to divide by twelve and make twelve charges?

A: No, you can also create a frequency code. Then using your filter, select a demographic code and a frequency code, say Family and Quarterly, and indicate that you want families with All Selected Codes. This will bring to the screen all people who pay at the Family rate and pay quarterly. Then go to Special/ Assessments/Make Assessments, enter the full amount, indicate that there will be four payments, once every three months and enter the date of the first charge. Then press Assess and Close. Of course, always make a backup first.

Q: Is there a way to see all people who have outstanding balances in a certain account?

A: You can run the Member Status report (250) for that account, checking the Outstanding Only box. Or you can go to Special/Mass Tagging/Financial and select an account and date, indicate that you want to see people with a balance between 1 and 99999999.99, and press Tag and Close. The people who owe you money in that account will have a tag ("☜") in the right most column. You can then run any receivables reports for tagged only.

Q: What does it mean when it states "credit" in the balance field in a member's account? How does that appear in reports?
A: *Credit* means that a person has paid more than they have been charged in a particular account. You might want to check and see if this credit amount was entered as a payment when it should have been a donation.

Q: I just got a bounced check! What should I do?
A: When you are notified that a check has bounced or a credit-card payment been charged back, you must create a Reversal transaction. For details, Search Help for *Refunds and Reversals*.

After posting the Reversal, you may want to go into the member's account and add an additional charge for any bank charges you have incurred. If you do this, make the charge in your 'bank charges' expense account; then when the member's payment is made it will act as a reimbursement, reducing your total bank charge expenditure as it should.

Q: What if someone paid for something and then I need to refund their money?

A: You must create a Refund transaction. If you have the Payables option, you can print the refund check at the same time. For further information Search Help for *Refunds and Reversals*.

Q: Is there a report that produces a monthly deposit report detailing all deposits that tells which account was credited?

A: Report Transactions by Date (275) shows every individual transaction in the account or fund range and time period selected, sorted by date and order of entry. You can choose to include only transactions of certain kind, e.g. payments, or all transactions.

The report Check/Deposit Register (260) can be used to show all deposits in entry order. However, individual income accounts are not shown for split checks.

Q: Our financial secretary really wants a 30-60-90 aged receivables report**.**

A: Uncle. We held out for a long time on the grounds that most charges are levied on the first of the month, and months have differing amounts of days, but we finally capitulated to popular demand, and starting with version 4.74, Reports/Receivables/Aged receivables will analyze your congregants' indebtedness in 30-day increments. Just remember, 30 days hath September...

You can also use the Member Status report (250). It tells the member's current balance for any given account or overall, and the last credit, its type and its amount. Thus, if a person has a large balance but has just made a substantial payment, a telephone call on the subject is unnecessary, possibly even counter productive. On the other hand, a person with a smaller balance but who has not paid anything in awhile might need a reminder.

Q: I have a member who wants to pay his dues with a stock transfer. How do I enter this?
A: If the stock was sold, enter its sale value as a dues payment, indicating in the memo that it was a Merrill Lynch check for the sale of 10 shares of Acme stock. If the brokerage house charged a fee, you can enter that in the general ledger, rather than in the congregant's account. It may be the case that the money was actually deposited to your Merrill Lynch account which is not your associated account for dues. In that case, make a journal entry dated the same day, moving it out of your operating account and into your brokerage account.

If you decide to hold onto the stock, give the member a Work Credit for the value of the stock on that day and do a journal entry debiting your stock asset and crediting Dues. You will have to write a letter thanking him for his donation and mentioning the date, the type of stock and the number of shares. This will be his documentation for the IRS, as no cash receipt will be generated.

Q: What do I do when I receive in January a check dated December 31, and the member wants a tax receipt for the previous year?
A: Record it as of the last Sunday in December. Be sure to keep this in mind when you reconcile your January bank statement.

Q: We have Fair Share billing. How does Rakefet handle that?
A: Using the Browse Assessments feature, you can record and store each member's fair share amount next to his name, in one of the columns. Then make a backup and go to Make Assessments and charge them that amount in the appropriate account on the correct date. The amount can remain in the browse section until next year when you can review it and make whatever changes are necessary before assessing again.

If next year they vote in a 5% across the board increase, you can use the Update Column feature to increase each person's designated amount before you assess them. For details, Search Help for *Mass Assessments*.

Q: I need a report that will show a list of member families and how much they have pledged, paid, and donated in various accounts.

A: Receivables by Family (262) will allow you to select a range of accounts and dates and give you a summary of each account, charges or pledges, payments, donations, and balance.

Q: If I receive a check from a foundation, how is that entered?

A: You should enter the foundation in your database so you can issue proper receipts for the foundation's taxes. You can create a family code, Foundation, that implies an account and apply it to each of them. You will want to record in Remarks if this foundation is associated with one of your member families. You can also use the Relationship Manager to link foundations with their associated humans.

Q: What if a parent pays his son's dues or his grandchildren's school fees?

A: Indicate an Work Credit in the son's account, with a memo explaining how it was paid. Then show the money as a Donation in the parent's account, with an explanatory memo. This will ensure that the right person gets the tax deduction.

Q: How do I enter a company check from a person? What should it say on the receipt? Should I address the receipt to the person c/o the company or not mention the person at all?

A: The solution depends upon the relationship between the member and the company. For instance, if a corporation donates money, the receipt would be addressed to the corporation. The corporation should be entered through the Membership List. If the company or business is owned by a member and they use its address as a Secondary Address for billing and so forth, then you include c/o the name of the person in the company's address. If the corporation has a liaison that helped you receive the donation, include his name in the first line of the address in the corporation's Database Detail and in the Memo field of the donation activity in the Account's page.

Q: What is the purpose of the "units" field?

A: *Units* are used to enter the number of people attending a function, like a dinner. It is very useful if you are having an event, where for example, you are charging $100 a ticket and the fair market value of the dinner (couvert) is $30 and the other $70 is counted as a donation. The Couvert amount of $30 is set for the dinner account in the Chart of Accounts. Then when someone pays you $300 for three tickets, you enter that payment in their account for 3 Units. Rakefet will tally-up the donation amount as $210.

Another helpful thing Units can do for you is give you a head-count of paid tickets to your function. For details Search Help for *Couvert*.

Chart of Accounts:

Q: Is there a way to change account number designations? Some parts of our Chart of Accounts were poorly planned and we need to fix it.

A: There is a Maintenance program called Change Account Numbers. The change will affect all charges, payments, donations and non-cash credits retroactively. To do this, you will need to be in Maintenance Mode. Make sure to read the documentation and do a backup first. You can either renumber an account or merge two accounts into one.

For details Search Help for *Changing Account Numbers.*

Funds:

Q: What is a Non-Restricted Fund?

A: A Non-Restricted Fund is a way of grouping accounts for reporting purposes. If you have a fund-raising dinner, you can link all the associated income and expense accounts to a fund. Most General Ledger reports can be printed for a range of accounts or a single fund. The person who's running the dinner will love you when you print Report 256 for only his fund. It will be a mini-report of all the income you've banked so far, all the bills you've paid and a bottom line on his affair. For further information Search Help for *Funds*.

Q: What is a Restricted Fund**?**

A: A restricted fund is a group of accounts which maintains a balance. If the income collected can only be used for a specific purpose, and the fund carries its surplus or deficit forward from fiscal year to fiscal year, it is a restricted fund and you will want to click the appropriate box in the Fund File when you create it. This will create an equity account (like Q90001), which will be used to calculate the numbers in Restricted Fund Balances on the Balance Sheet. The restricted Fund Summary report (252) will show you the starting balances, receipts, disbursements, and the ending balances of your restricted funds. Report 256 can be run for a single fund; if it is a restricted fund, it will give the opening balance, all detail in the period and the closing balance. For details Search Help for *Funds, Restricted Funds.*

Budget:

Q: What is a budget category?

A: Rakefet allows you to define categories that will associate one or more Income/Expense accounts with a line on your operating budget. This allows you, for example, to take all the accounts associated with various fund raising activities and channel their net activity into a single budget line called Fund Raising. Money that is not part of your operating budget, such as restricted fund income, can be eliminated from the budget by not associating it with any budget category.

You can either budget what you expect to happen in that category *as a whole* (the second choice under Setup/Budget/Budget Type) or you can budget for each of the component parts and print your reports either summarized (the third choice) or broken down and subtotalled (the fourth type.) For details, Search Help for *Budget*.

Q: Why can't I just plug in my annual budget figure for each category?

A: Synagogues tend to have a financial cycle that has peaks and valleys for most categories: A lot of dues come in when you first assess them, with another lump in December. It is easier to see how you're doing if each month projects what you might realistically expect to happen and not 1/12 of the total.

If you do have an item which is equal every month, like Rabbi's salary, you can type in the first month and then click Fill Right to place the same number in each month. If you're used to an annual budget, look at the Budget Progress report, 270, to see your year-to-date actual as a percentage of your yearly budgeted amount. For details, Search Help for *Budget Amounts*.

Financial:

Q: What is Year-end Processing?

A: The Year-End Processing summarizes and zeroes out all income and expense accounts. It is always performed *as of* the end of your fiscal year. Since

Version 4.5, the detail information in the closed period is visible and available for reports, even if the reporting period spans a closed and open period. However you cannot edit transactions in a closed period or add additional ones.

Q: How do I replenish petty-cash in Rakefet?

A: As you spend the money in the petty cash box, keep all the receipts. When it is time to replenish petty cash, write a check for the total of the receipts, with a line for each expense account. That way, your record of your expenses will be accurate. Think of it as if you are writing a reimbursement check to one of your members for laundry, office supplies, postage, etc.

Q: How do I reconcile my bank accounts?

A: If you have the Payables option, the Reconcile Bank Account function is available, as is the Bank Reconciliation report (274). To reconcile your bank accounts, go Special / Reconcile Bank Acct. Search Help for *Account Reconciliation*.

Q: If a member joined for a short time and then quit, should I delete them?

A: Do not delete them if they gave you money. You will need to give them a receipt next January for their taxes. Remove their Family Code that indicates that they are a member and give them a Family Code that indicates that they are inactive.

When you delete someone from the database, their cash payments move to the general ledger as income. Their charges, non-cash credits, children, and family information, all disappear. For further information, Search Help for *Families that Move or Resign.*

If you have already given them a receipt and you decide to delete them, check to see if they have yahrzeits. If their yahrzeits are not observed by other people and they do not have a plaque, you may wish to delete the names of the deceased from the Yahrzeit page. If you do not, the yahrzeits will remain in the file with 0 links. No letters will, of course, be generated but the name will appear on the Yahrzeit List, unless you have indicated in preferences that you want the report to observe filter and tagging.

Receipts:

Q: What's the difference between Cash Receipts and Donor Receipts?

A: Cash Receipts are used to receipt a particular payment or donation transaction. The cash receipt number is permanently associated with the check in question. Unlike the Donor Receipt, the cash receipt is completely customizable via the Letter Writer Setup. You can edit only the text of the Donor Receipt in

Report Preferences.

The Donor Receipt was developed to meet the requirements of the US and Canadian tax authorities. It can be printed for any time period. It is not completely customizable, but you can change the text message that appears at the bottom.

Although you can print a Donor Receipt for a single day to receipt a single contribution, in this case you may wish to use a Cash Receipt instead. For further understanding of the receipts Rakefet can generate Search Help for *Receipts*.

Letter Writer:

Q: Is there a special feature for thank you letters?

A: You set it up yourself in the letter writer. This way you can customize the letter for any occasion. The letter writer has several useful fields that you can insert into your thank you letter such as “last contribution/pledge amount” and “last contribution/pledge memo”. Once you create the letter, it will always be ready with your own personal touch. As a starting point, please refer to the sample “Thank you” letter which is supplied with the program. For further details, Search Help for *Letter Writer*.

Q: Oops! I got behind in my thank yous, and now they have a dues payment later than their donation.

A: What did your mother tell you about acknowledging promptly? Never fear. Just go to the member's account, highlight the transaction, and use your right mouse button to access the letter-writer.

School:

Q: Is there a good system for coding classes so that it will be easy to promote the kids over the summer?
A: When you're setting up the classes, use a year for the code. If you do Confirmation, that's the best one; otherwise use the Jewish year they will bar mitzvah. So when you get a class of first graders in 2004, call them the class of 2014 and let the description be 1st Grade. Next year, just change the *description of the class* to 2nd Grade, but you don't have to change the individual kid's code.

Q: What is the second class for?
A: It can be for Hebrew, if the grouping is different than for their regular studies. Sometimes one class is the group they're with on Sunday and the right hand one is the group they're with during the week. Sometimes one is the core curriculum and the other is the elective. If the same group of kids studies together all the time, you may not need the second field–just use the left-hand one.
Q: The principal needs to record information on the kids that we don't want everybody to be able to access.
A: There is a memo field on each child's page that works like the memo field on the family page. It is also

encrypted and you can set up a password for only this function in Setup/General/Misc.

Defaults:

Q: Most of my addresses are in Brooklyn. Is there a way to make the city automatically come up when I enter a new family?
A: Yes. Go to Setup/ General/Defaults and set your defaults as needed i.e. city, state, zip code, and telephone area codes. Then every time you add a new family, it will assume these defaults, which you can of course overwrite.

Yahrzeits:

Q: What if we need to remember a yahrzeit that's not linked to any specific family?
A: Go into the yahrzeit file of any family. Add a Yahrzeit entry including the name, date of death, etc, and then click your mouse on the Complete Yahrzeit File, at the left of the screen. The deceased will appear there, and also in the Yahrzeits Linked to this Family, on the right of the screen. Highlight him in the latter, and click the left-pointing arrow between the windows. He will disappear from the Yahrzeits Linked to this Family, and appear in the Complete Yahrzeit File with 0 links. The deceased's name will appear on your yahrzeit lists, and no letter will be generated.

Q: How can I arrange it so the yahrzeit letter goes out to the wife only?

A: A given yahrzeit can be linked to either the family as a whole, to member 1 or to member 2. This designation appears in the Yahrzeits linked to this Family screen, after the name. A 0 means it is linked to the family. Make sure you select the relationship so that it will make sense with your letter template.

Q: If someone passed away in Adar-II, will their Yahrzeit be missed by Rakefet in a non-leap year?

A: No. If a person passed away on Adar-II 6, 5760, they will be remembered the next year on Adar 6, 5761. Rakefet also has a custom switch for leap years. To read more about leap years and yahrzeits, Search Help for *Leap Years*.

Q: How can I get a list of yahrzeits with plaques?

A: In the Yizkor report's preferences, you can tell it to sort by deceased and "note 1" or "note 2" . Most people enter plaque location in "note 1" field and cemetery location in "note 2" field. If you sort on one of the note fields, only Yahrzeits which have something in the field will be included.

Q: Does the yahrzeit list respect the filter?

A: It can be instructed to respect any view, filter or tagging that you apply. Go to Setup/Report Preferences/DB/Yahrzeit and check the box labeled

'Observe Filter & Tagging.' Remember, if you apply a filter before running the list, names which are not linked to anyone, but who may have plaques in your sanctuary, will not be included. If someone has resigned, whether you are deleting him now or retaining him for financial reason as a Resigned Member, check his yahrzeits and delete any that you no longer wish to remember.

Palm Pilots:

Q: How do I save information from Rakefet into my Palm Pilot?

A: You can use the Member Data report (152). In the Report Setup window of this report select the field groups you need by clicking on Fields/Load/Palm Pilot Family or Palm Pilot Individual. Set the Print Where switch to "comma separated (CSV)" and then click print to create it. The CSV file can then be imported by the Palm Pilot desktop software.

Scheduling:

Q: How do I indicate that the Ritual Committee will be meeting in the library from 7:00-10:00 p.m. on Thursday evening?

A: Go to Special/Scheduling. Click "Add" to create a Resource Name for the library, if you do not have one. Then click or select the date you need, and then type in the activity next to the correct start time of the event and then click with the right mouse button the correct end time of the event. This will highlight the time range of the event. If this is something you want to publicize, click with the right mouse button at the start time of the event and select “Make Event Public”.

Q: I’ve listed all kinds of things in my event scheduler—meetings, classes, appointments, special services, guest lecturers. Is there some way I can designate the things that we want to include on our bulletin calendar?

A: After you’ve typed the event in the time slot for its beginning and gone to the time spot for its end and right mouse clicked to Set Event End, go back to the beginning of the event and right mouse click again. If you select Make Event Public, you will see a little pushpin designating the event. You can then go to Reports/Scheduling/Public Schedule, report 802, and print it out for the bulletin editor.

Downloading upgrades from the Rakefet website:

Q: How do I download an updated version of Rakefet from your website?

A: First go to the website **www.rakefet.com**. At the site click the link to “For Our Users”. Once there, print out the instructions and read about “how to download”. To install the downloaded upgrade, you will need to contact us for a password.

Holidays:

Q: How do I assign High Holiday seating?

A: Go to Setup/Seating and define at least one location (although there may be more) and at least one section (ditto) and then designate the rows in each section and the seat numbers in each row and whether they are odd, even or consecutive. If you bill by seat location, you can enter the cost.

On each family's second page you can assign a seat to each adult and child in the family. If they are inviting guests and you do not wish to enter them in the database, use your right mouse button to add more seats to the family. If one member is paying for other people who are in your database (like adult children), you can double click on the Sponsor filed and select from your membership the party to be billed. You will see that Special/Assessments/Make Assessments now contains a feature to bill for seats. This can be done globally or only for a tagged family.

Q: How about High Holiday honors?

A: You can create user defined fields called "High Holiday Honors-Member 1" and "High Holiday Honors-Member 2." (These will be paired by clicking the 'pair' box between them.) Number your honors in a continuous system and enter the data as "005--open ark p.87 First Day Rosh haShana" By changing your

View to Adults, Report 152, sorted by honor number will tell you who is in charge of each step.

Q: Can Rakefet handle our Shalach Monas project?
A: Can it? It does everything but bake the hamentaschen! Search the Help under *Shalach Monas* (or under *Mishloach Manot* if you're a purist) and see how to indicate who is giving to whom and who wants to reciprocate to everyone who gave to him. The relationship Gives Mishloach Manot To: contains a box to indicate the price per basket, and the Make Assessements screen has an option to bill for Mishloach Manot.

E-Mailing:

Q: How do I set up my E-mail in Rakefet?
A: If you want to be able to send letters, statements, etc. to members by e-mail, you must fill in the fields on Setup/General/E-mail page.

In this page you must enter your **Outgoing Mail Server Name** and **Mail Server User Name**. You can obtain this information from your Internet service provider, or (for large organizations with internal networks) your network administrator. If you don't know it, look in the setup section of your existing e-mail program. Next put your own **e-mail address** here. This will serve as the return address for outgoing e-mail. Click the “OK” button to save the changes in this page. To read more about e-mail in Rakefet search Help/E-mail Setup.

Q: I have to enter a members’ e-mail addresses. Where do I enter this?
A: In each member’s database there is a page called “Family 2". Click on this tab and enter the family’s e-mails, pagers, fax numbers, and mobile phones. Children’s personal e-mail addresses can be entered on the Children’s page.

Q: I’ve entered everyone’s e-mail addresses, family, individuals and kids. 99 times out of a hundred we send to the family e-mail, but there are some families where people want to be notified at all 17 of their e-mails. I blush to ask, is this possible?
A: Actually, yes. Next to the e-mail address is a little box. The default is that the family e-mail is checked, and it’s the only one utilized for an e-mail done from a family view. But you can check as many as you like, and they will then be deluged with reminders that Friday’s service begins at 7:00 p.m.

Q: I need to e-mail statements to some of our members, but not all of them, and then mail out the rest. What should I do ?
A: Using Special/Mass Tagging, request everyone whose Family e-mail contains “@”. In the Report Setup for Statements, select the switch to print as Send as E-mail. Click the “Print” button and “close” on the text

editor box. After that a “Subject” box will appear. You can edit the subject if you want. Once you have clicked OK, your Statements will be sent only to the tagged families. Afterwards you can print them out for “untagged only”.

Q: How do I e-mail a Rakefet report to someone who doesn’t have the program?

A: Any report can be printed to the screen (the default) to your printer or to File. If you choose the latter, you will be asked to designate a file type. When you click Print, the Export File box will open, allowing you to designate the file where this information will be stored. The default filename is RA.RTF, but you can change it to whatever you like. A file sent as RTF will open in Word, and a CSV file in Excel.

Filtering:

Q: How do I send a mailing to every family that contains a Sisterhood member?

A: To create a mailing list of the Sisterhood members’ families, set your View to Families With Accounts or Member Families. Then click on the Filter button and check the box that says “Use Individual Codes in Family View”. After checking this option, you will have a list of Individual Codes. Select Sisterhood Member, click the OK button, and then print your labels.

Q: How do I send a mailing to all females in my membership?

A: To create a mailing list of the females in your membership select the View Adults or Adults and Children. Then click on the Filter button and under the Limit To section select Women and Girls Only. Click the OK button and on the Membership screen you have a list of all your females to generate a mailing. N.B. If you forgot to fill in the sex field in someone's file, that person will not come through the filter.

Q: How can I see a list of all Brotherhood members who are Cohanim?
A: To see a list of Brotherhood members who are also Cohanim set your View for Adults. Click Filter and select the Individual Codes Brotherhood and Cohen. Indicate that you want to see members with *all* codes.

Q: I want to look at all the people who do *not* have the code Member. How do I do that?
A: Select the code or codes that imply membership, and then say that you want None of the Selected Codes. Everyone who comes through the filter *does not* have the code Member.

Q: How can I see everyone whose Jewish birthday is in Tishrei?
A: Select an individual view: Adults, Children or Adults & Children. In the Filter window, under Date Filters, select Jewish Birthdays and select the month

under Jewish Date Observed.

Q: How do I filter for all children 13 years and younger?
A: From the main Database screen select the View of Children. Click on the Filter button. In the Filter Window, under Date Filter, select Birthdays, set date parameters for thirteen years ago until today, and check Year is Significant.

Mailing:

Q: How do I print labels with bar codes?
A: To print labels with bar codes go to Report/ Membership/Labels/Envelopes. Select Labels. In the Report Setup page select Preferences and then select how you want your bar codes (above or below the address).

Q: We're having a very nice affair and I want to print the labels in a tasteful script. But when it prints in all caps, it's completely illegible. Do I have to print labels in all caps?
A: All other things being equal, the post office would prefer that you print all caps—its robots can read them more easily. But if you would prefer not to, go to Setup/Report Preferences and turn off the option that says "Force label and envelope addresses to upper case."

Q: That's very nice, but some dingbat that worked here years ago actually *typed* everybody's name and address in all caps. Is there anything I can do about that other than retype them all?

A: Actually, yes. Go to Utilities/Maintenance/ Fix Capitalization and click your mouse.

Miscellaneous:

Q: What is the difference between the Remarks field and the Memo button?

A: Remarks are for information which can have public access like "works nights... don't call before noon". The Memo may be locked with a password to contain private information such as counseling notes.

Q: I would like to change the spelling of our synagogue's name, how do I do this?

A: To change your organization's name or even change the spelling you will need to call in so we can give you the proper codes to permit the change in the program.

Q: After tagging, is there a way to count the number of tagged families?

A: If you look at the bottom of the screen, you will see a headcount on all tagged families (or individuals.)

Q: Is there a way to copy and paste from reports? I use the yahrzeit, anniversary, and birthday information for our bulletin.

A: You can export the needed report to a file as RTF, which can be read by most word processor programs. Sometimes what you get doesn't look exactly like the printed report due to the different implementations of RTF, but you will play around with the text in the word processor anyway. Go to Reports and select your report. Set your Print *Where?* to print to File. Below that is a field called File Type. Click the down arrow and select "Rich Text, RTF". Click print and your screen will blink, which means it has created the file and you can open it in your word processing program.

Q: How do I produce a Membership file requested by the URJ?

A: The best report to meet their needs is the Member data report (152). In this report you can select specific fields that are being requested. In the Report Setup click Fields and then Load. Select the predefined setup for URJ. Indicate that you are going to be printing to File, select CSV as the File Type and click Print. The File Name box will pop up. Browse and select where you will save the report and click OK. You can save it onto a floppy disk, or more likely, into My Documents, from where you can attach it in your e-mail to URJ or burn to a CD. United Synagogue and other umbrella organizations have similar reports. Just make sure that the fields we have listed are the ones that your organization requires and are in the order desired.

Q: We are having a journal dinner and want to solicit donations from all the people with whom we do business. How can I print labels for them?
A: Go to Reports/Payables and you will find a function to do this.

Q: We still have vendors in the system from years ago, some of whom have gone out of business. Is there some way to get rid of them?
A: Yes, you can click Inactive on their vendor card in Setup, and they will not appear in the list of available vendors in payables. They will still appear on reports if the reports go back that far, but they will not print a label.

Q: We are having a dinner. As people make their reservations they designate their entrees and may indicate with whom they wish to sit. Later two stout-hearted women will sit and organize the seating arrangements and give the head-count to the caterer. Can Rakefet help me with the logistics of this?
A: As the families indicate that they will be attending, either by a reservation or a check, give them the code Dinner 2006 or some such. Designate a user-defined field as Dinner 2006 and record any preliminary information you have for seating: "seat

with Wilsons and Cohens NOT Jacobsons," adding afterwards 1 salmon 1 chicken. Alternatively, you can give each person an individual code for his entrée preference. After filtering on Dinner 2006, you can use Report 152 to list all the attendees with the preliminary contents of their user defined fields. After the seating arrangements have been worked out, go back and edit the fields to say 21-3 to indicate that this family has a party of three sitting at Table 21. Then you can print Report 152 sorted by the user defined field to get a listing by table.

Q: They've changed our area code again, this time for about half the membership. Do I have to edit each one by hand?

A: No. Go to Utilities/Maintenance/Change Area Codes. List all the prefixes that will receive the new area code and make the change. Do a backup first.