

RAKEFET NEWS

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Rakefet 4.21: *The New Features*

TSI
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Since the last CD release (version 4), we've added quite a few new features to Rakefet for Windows. For a complete list, including all of the bug fixes, go to our Web site <http://www.rakefet.com> and click on the link labelled Change List. Here is a partial list of new features:



General:

1. *Added Vendor Labels and Envelopes (454)*
2. *Added option to sort Activity Report (269) by name.*
3. *Added ability to use PhoneTree Group feature.*
4. *Added Spell Check to Letter Writer Setup.*
5. *Added new report listing Cash Receipts by number (Cash Receipt List (248)).*
6. *Added 'Today Only' item to Quick Date Setup in report setup window.*
7. *Added ability to click on browser header to sort by column in Family's Account page, GL page, and Payables Find window.*
8. *Added 'All Resources' option to Resource Schedule report (801).*
9. *Added option to show adults' ages in Birthday report (158).*
10. *Added ability to mark vendors inactive.*
11. *Added count of number of tagged items to main window.*
12. *Added ability to increase or decrease browse assessment amounts by a percentage.*

Relationship Manager:

13. *Added Finders to Relationship Manager.*
14. *Added Relations button and context menu item. Made relationship manager come up with selected row highlighted.*
15. *Added ability to do relationship queries for multiple families or individuals.*
16. *Added built-in relationship types for sending and receiving Mishloach Manot, and made them accessible in letter-writer. Also added built-in relationship types for non-custodial parents and non-resident children.*
17. *Added procedure to reciprocate for Mishloach Manot.*
18. *Added options to limit relationships to families or individuals only to relationship types file.*
19. *Added ability to apply multiple relationships in a single operation in Relationship Manager.*

International:

20. *Added Currency Conversion function (for Euro, etc.).*
21. *Added Charity Repayment Claim report (240) for UK users, data entry for UK Tax setup, plus context menu entry to link transactions to a donor.*



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Coming Soon: *The Rakefet Security / Audit Option*



We are in the planning stages of a new optional feature for Rakefet: the Security / Audit option.

If you are a large organization with many people using Rakefet and would like to have better control of who does what (and who DID what) in Rakefet, this is for you. Here's how it will work:

- 1) When a user starts Rakefet, she or he will be asked for both a User ID and a Password. Unlike the current system, everyone will have a unique password. One user will be designated Administrator; that person will decide what functions each user can perform in Rakefet. This will give more security and much finer control of access than the present system.
- 2) Every change or transaction will be logged in an audit file. The records will contain the User ID as well as the time and date of the change. An Audit Report will be provided so that the Administrator can keep track of all data entry.

The Security / Audit feature will be an extra-cost option. We'll announce the price as soon as it is ready.

-Vic

Technical Topics

Windows XP:

Many of you have asked whether Rakefet will work on Windows XP. Although we haven't tested it in our office, a number of Rakefet users have been using it with no problems. Internally, Windows XP is similar to Windows 2000, which we have tested exhaustively, so this isn't surprising. We are officially committed to supporting XP of course, and if any XP-specific problem does arise we will fix it.

Although many new computers will come with XP installed, we do not recommend that you upgrade an existing system to XP unless it is a year old or less, and unless you are prepared to reformat your hard drive for a completely 'clean' installation.

Rakefet on the Mac:

Although we do not have a Macintosh version of Rakefet (there are not enough Macs out there to justify our cost of creating one), it should be possible to run Rakefet on a Mac with a Windows emulator program. The program (all windows programs) will run

sluggishly compared to a native Mac program or a Windows program on a PC, so you should have a new fast Macintosh if you attempt this. You should also be sure you have at least version 4.21, because earlier Rakefet versions were confused by the way some emulator software handles printers, causing an error that prevented Rakefet from running.

Printer Drivers: Arrgh!

One of the most irritating kinds of problem that we deal with is that sometimes a particular printer doesn't seem to work properly (usually in the Letter-Writer). Since we can't test every printer, we don't know about the problem until a user tells us about it.

The printer driver is a program that is provided by the printer manufacturer and is installed in Windows. When you go to Start / Settings / Printers, the icons you see represent installed printer drivers. We suspect that the manufacturers test these programs by running Microsoft Word, and then release them. Then they get complaints from

people who are using other programs and go back and fix them. The fixed drivers are usually available on their Web sites, and sometimes you need to download and install a later version to solve a problem. If you need help finding a specific manufacturer's Web site, we can probably help.

Our Web site:

Recently (as a result of Melissa's prodding), our Web site got a facelift. I think it looks a lot more professional now. Send your comments to rakefet@rakefet.com.

-Vic



Updates on the Web

Recently we've started making Rakefet for Windows program updates available on our Web site as soon as they are ready. We've received some comments about this, both good and (surprisingly) bad! Let me explain why we are doing this and how you can take advantage of it.

Most software vendors release regular updates once a year or so. All changes and fixes that have been made during the year by their developers are included in these releases. In between releases, no changes should be made. Actually, some companies (including one large one that shall be nameless but was founded by someone whose initials are "B.G.") violate this principle by incorporating fixes in shipping programs without telling anyone. This practice is called 'slipstreaming' and is frowned upon.

We wanted to make it possible for all

of our users to take advantage of changes as we make them and as soon as they are tested. Generally, it makes sense to do this every two weeks or so. However, given that the cost of preparing and mailing each CD is probably around \$5.00, it would cost us \$91,000 a year to send a CD every two weeks to each of our more than 700 users!

What we've decided to do is to continue to send CD's once or twice a year, but also to allow paid-up users to download intermediate upgrades. The important thing to keep in mind is that you do NOT have to download all (or any) of these! There is a link on our Web site to the Change List that will have the changes (both new features and bug fixes) included in the latest update at the top. Look at this list, decide if any of the items on it are important for you, and download the upgrade only if they are. Note that you do not have to download all the upgrades between the

version you have and the latest one: any version can be updated in one step by installing the latest download.

How do you know when intermediate updates are available? You can just check our Web site (go to <http://www.rakefet.com> and click the link to For Our Users). Or you can put yourself on our e-mail list to automatically receive an e-mail message as soon as a new version is ready. To do this, just send an e-mail to rakefet@rakefet.com asking to be put on our update notification list.

Instructions for downloading updates are found on the For Our Users page. You will need a password to run the installation. If you are on our e-mail notification list it will be in the message you receive. Otherwise, you can call or e-mail us and ask for it.

-Vic

How to Get an Item on our Wish List

As you know, Rakefet updates are based to a great extent on suggestions received from our users. In a previous newsletter, I described the process that we go to in deciding what to include in an update. I also emphasized that although we can't promise to implement everything you ask for, we do guarantee that all suggestions are taken seriously.



It's important, though, to make sure that your suggestions are recorded properly. The most effective way is for you to put your suggestion in the form of an e-mail message. Send it to rakefet@rakefet.com, with the words 'Wish List' in the subject heading. These e-mail messages are looked at whenever we plan an update. They will not get lost like the post-it notes on my monitor!

-Vic



Visit us on the web!

www.rakefet.com

Dear Lise

Dear Lise

One of our congregants donated some stock to pay off his dues and building fund and said that the rest should be a donation. So now, in addition to answering the phone, making coffee and getting the rabbi off to his appointments in time, I'm suddenly a stockbroker. Where do I begin?

~Mary Lynch

Dear Mary,

First of all, determine from your brokerage account what the value of the stock was. You will need to tell them the day it was donated, the name of the stock and the number of shares. Make a journal entry making a credit to dues, building fund and the specified donation account that adds up to this amount. The debit will be mostly to the brokerage account (E.F. Hutton, Smith Barney or whatever) and probably a small debit to some expense account called "fees for sale of stock" which is Barney taking his cut. So now your general ledger is right and you will see an entry in all your GL reports, budget reports and bank account reports accurately about getting money for dues, building fund and the donation. The next thing to do is go to the congregant's account and, using a Work Credit (best to save Other for actual write-offs) show that his dues and building fund have been paid, noting in the memo that it was a stock transaction. As for the donation, you will have to enter a charge and a Work credit to show it on the member's account. Since Rakefet will only issue a cash receipt for actual cash, you will need to utilize the letter writer to thank him, mentioning again, the type of stock, the number of shares and the date it was donated.

Dear Lise,

I went to run off my Donor Receipts in January, and I printed them to screen to make sure the covert was working right for the money that we made on our Journal Dinner (it was.) Since everything looked OK, I went to print them from the screen, and my little printer icon was disabled. What gives?

~Puzzled in Poughkeepsie

Dear Pookie,

Since receipts are numbered consecutively, we don't assign them numbers when they print to screen, only when they actually print on paper. This allows you to review them, as you did, and, if necessary, go back to your chart of accounts

and change the tax deductibility status. When you have made any adjustments you need to and are ready to print, go back to the report setup and send the job directly to the printer.

Dear Lise,

Since version 4, the balance sheet looks different. Now instead of being totally unintelligible, it almost makes sense. Just explain to me where the numbers on the bottom come from.

~Abacus-challenged in Albuquerque

Dear Abby,

When we took the advice of Rakefet users of the accounting persuasion and made the restricted funds into Equity accounts, a lot of things got clearer. Assets still equal liability plus equity, but now the equity, which is basically all your assets minus anything you owe to a body outside the synagogue (like the government or Snidely Whiplash) is divided up into two kinds: equity that is earmarked for a special purpose, like the building fund or the library fund (it can be viewed as money you owe to yourself); and equity that can be used for any purpose, like paying the electric bill. These are each broken down into Retained, which is how much came forward the last time you closed the books (if you've never closed the books, it will be 0) and Increase (Decrease), the gain or loss during the open period.

Dear Lise,

When I took this job, the woman who trained me told me that, when we got a little donation from somebody out of the community, or had a rummage sale, or emptied out the pushke, to enter the money in a dummy account called Miscellaneous. But now when I'm running year end receipts, I have to remember to go and untag him, and whenever I do mass tagging to figure out who are our big donors, this dummy account keeps showing up. How should I be handling this?

~Suspicious in Sausalito

Dear Susie,

Alef kol, kill Mr. Miscellaneous.

Continued on page 5

Highlight him, click on the garbage can, and confirm deletion. All his transactions will go and post themselves in the general ledger on the correct date, in the correct amount, to the correct account. All your GL reports will be as they were and your Receivables reports won't look so silly. Next time Dave's Cousin Sally comes in from Toronto and makes an \$18 donation, go to the General Ledger, hit add, and list this transaction just as it occurred: date, account, amount., check number. You can write Cousin Sally in the memo field. You will not be able to generate a thank you letter or a receipt, but you weren't thanking or receipting Mr. Miscellaneous anyway. A variation on this, for transient people, is to enter them in the database, thank them receipt them and then delete them. The transaction will then be in the General Ledger like Mr. M's largesse, only it will have the correct name in the ledger field.

Dear Lise,

We bill dues on the Fair Share system. I store everybody's amounts in Column 1 of Browse Assessments. Three years ago when the board mandated a 7.5% increase, I spent a lot of quality time with my friend Mr. Pocket Calculator, figuring out the new amounts. This morning I got a note that they'd raised it again. I went into Browse Assessments, and there was a new field called Update Column with a % sign at the end. Am I dreaming?

~Pinch Me in Parsippany

Dear Pinny,

I'm glad to tell you that this is indeed what you and all the other Fair Share billers have been waiting for. If there is an across the board increase of 5.2%, you type in 5.2, highlight the appropriate column and click OK. Of course, you will want to make a backup first in case you misplace the decimal point and increase everyone by 52%!

Dear Lise,

Do you make up these questions?

~Curious in Coeur d'Alene

Dear Curry,

Yes.

-Lise



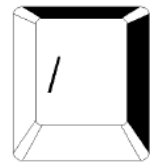
Where's my backslash?

Hey folks,

It's your friendly tech support gal again bringing you a bit of enlightenment and office cheer. Thought I'd write a little article about a very important key known as the *the backslash*.

In the past few months when providing tech support for an array of issues like mapping network drives, playing around in the rakwin32.ini or DOS.... I have noticed that most callers aren't too sure what a backslash is... or where their backslash is. In most cases, after asking the common caller to type a backslash... the usual response is dead silence and a sheepish question, "Backslash?" So to avoid any more misery over the backslash, let's just set the record straight.

This is a **FORWARDSLASH**. Notice how the slash leans forward ever so dignified. **FORWARDSLASH** usually hangs out with **QUESTIONMARK**, which is at the lower right of your keyboard.



This is a **BACKSLASH**. Notice how the slash leans back ever so relaxed. You can usually find **BACKSLASH** above the **ENTER** key, which is far right center of your keyboard.



Well, that's a wrap. I hope this has helped some of you out there. Next time I'll talk about my trip to New York and visiting with the staff of the Village Temple and we will learn more about this creature below and what you should do when you meet him:



All the best.
Regards,
~Melissa

Mishloach Manot in Rakefet

The first time someone called and asked if Rakefet handled shalach monas I was puzzled: “You go in the kitchen and bake some hamentaschen. What do you want from the computer?” The woman patiently explained to me that this was a fundraiser—the synagogue acts as the agent for the congregant, preparing a little basket and delivering it, and the congregant pays the shul. As I was treasurer of my own congregation at the time, I was always on the lookout for new fund-raising ideas. “How much do you charge per basket?” She told me. I said, “That doesn’t sound like enough to cover the cost of the ingredients. How do you make any money at it?” She patiently explained that when the second and subsequent friends ordered a basket for the same family, additional baskets were not sent, but additional names added to the card. At last! The little light bulb went on over my head. The first name on the card about covers the cost of the basket. Additional names are gravy. “I get it. I’ll talk to Vic. Maybe we can do it by next year.”

A few years later when I was working with our fledgling youth group, the Jakes, I explained the principles to them, and they responded enthusiastically. We sent out flyers to the Hadasah mailing list and got quite a good response. Saul told us to come over and pick his orange tree bare, so we had

free fruit. Jeff’s grandfather took a few kids shopping for nuts, raisins, and pretty paper napkins and then wouldn’t accept reimbursement. Jeri found a little store downtown selling adorable tiny baskets for unbelievably cheap. Albertson’s had kosher poppy seed filling. We were on a roll! Back in the shul kitchen with the flour and sugar, we suffered a minor setback: Rebecca had promised everyone that there would be *five* hamentaschen in the baskets—that worked out to slightly less than a thousand cookies—oof! We’ll skip over the part where Ann gave Sam some big sisterly advice and he felt compelled to crack an egg over her head, and say that a jolly time was had by all. Delivery was not so jolly. Winding down meandering roads in developments so new as to not be on my map and arriving at dead ends three numbers before our destination, we formed a resolve to ask the donors for cross streets next time—if there ever was a next time. But all our frustration melted as we rang the doorbells and were greeted with amazed delight on the part of the recipients. Time and again the kids found themselves embraced by an elderly transplant from Brooklyn who exclaimed, “Shalach monas! I haven’t gotten shalach monas since I moved to Fresno!” It was a real feel good mitzvah—on both sides of the basket. The kids had a great time and earned enough to send

two of their members to the next USY convention. “Next year,” I promised them, “We’ll have software for this.”

Well, it’s here at last. Version 4.21 has two built in relationships—Sends Mishloach Manot to and Receives Mishloach Manot from. There is charge connected to Sends where you can input the cost of the basket to facilitate billing when all the orders are in. And there’s even a reciprocity feature. Your congregants can authorize you, if they are receiving a basket from someone to whom they have not sent, to send that person a basket and bill him. Those of you who’ve been doing Mishloach Manot for years—we’re sorry it took so long. Those of you who haven’t—search Help under Mishloach Manot (or Shalach Monas) and think about this fun and profitable fundraiser.

-Lise



Are you on our e-mail list for upgrades?

If not...

E-mail us

at

rakefet@rakefet.com



Greetings from Moshe Chinuch

Those of you who have ever downloaded the dummy data from our website, to use for an example or to practice on, or have flipped through the blue spiral bound Installation Guide and Sample Reports may wonder into whose lives you are prying. The answer is—no one's. Long, long ago, in Rakefet for DOS days, a synagogue treasurer was evaluating our package and asked for some samples of reports to show his board. Since the demo we send out arrives virtually empty so that the potential user can enter his own people and financial situations, and is locked at 25 entries per file, it is difficult to produce reports that contain enough data to be meaningful, especially budget reports and year to year comparisons.

Vic asked me to run off some reports to send this man, and it sounded an easy enough task until I realized that anything I could print out would contain personal information about either the members of my shul or the local chapter of Hadasah. Since we are so scrupulous about privacy that we shred every piece of paper that contains the name and address of either a synagogue or a real congregation, it would hardly be fair to send off sample reports listing the good Jews of Fresno and their contributions. So I took the Hadassah books and started disguising names. Then I realized that the street addresses were still intact, swung through again and disguised them, and ran through again changing telephone numbers—and Congregation B'nai Shaluf (The Sons of Transparency) was born.

In later years, the synagogue secretary told me she could still identify ninety percent of the people, so Melissa and I started with an empty demo and began rebuilding this redoubtable congregation anew—people, kids, and deceased relatives. As the financial maven, I got to create the chart of accounts which meant making up their yearly cycle—what fundraisers they held and when, who all their vendors were, assessing people dues and tuition and then logging in imaginary payments. It was a great way

to debug a new version, but it was like writing a really boring novel, and my tendency to respond to boredom with jokes didn't fly any better with Rakefet users than it had years ago with my teachers: "Trotsky is NOT your grandfather, and Emma Goldman isn't the president of your shul, and she never had a son named Regicide, either!" Well, at least I knew somebody was reading my literary creation.

Another purge, and this time everybody was really make-believe. But despite the fact that these were imaginary characters, they began to make their personalities felt—Stan Roth is a lonely bachelor who pledges more than he can afford at Yom Kippur; Walter Berman got downsized and fell behind in his dues so he put in some hours in the office in exchange when Hepzibah Moskowitz, the redoubtable synagogue secretary, was on vacation. Rabbi Gedalia Cohen is studious, absent-minded and conservative but gets along well with young Cantor Shira Zimmerman. Paul and Paula Adler have an accounting business together and take turns being the treasurer of the congregation. Paula used to be married to Jonathan Zuckerman and they had a daughter together, Hogla, who is my guinea pig in my search for a better way to get school information out to non-custodial parents.

When the big box of blue books grew empty, I volunteered to pick up the life threads of these good people where I left off in 1999, the last publication date. So for the last month I've been writing the story of the Sons of Transparency, getting their finances up to date and getting them ready to send Mishloach Manot to each other this Purim. Is this what my kids mean when they tell me to get a life?

-Lise



WORD SCRAMBLE

K R F E E T A

L T N H C C A E I

L E P T E M

L S R I A E

B A S A H T B

M P R I U

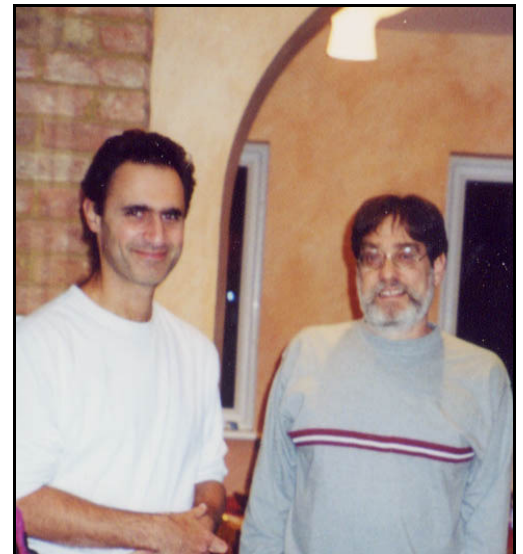
R A N J O L U N Y T R E

S A A B E P Y L



It's a Small World

Rakefet was originally intended to be marketed in the United States and maybe Canada, but as time went on, people talked to their cousins and we began to get inquiries from other parts of the English speaking world—South Africa, Australia, Hong Kong and the United Kingdom. Rakefet is quite easy to learn and the documentation is very comprehensive and easy to understand, so the time difference didn't pose a major obstacle. As we began to do more and more of our technical support by fax and then by e-mail, it became easier still. This past summer we began an electronic conversation with Nigel Cohen of Maidenhead Synagogue near London on the subject of the British tax system. Nigel was wondering if we could build into Rakefet some features to help them and other British users navigate the bureaucratic pathways to recover some of the tax money paid by their congregants. At that point we realized that we had fifteen users in the U.K., and it became apparent that a quick visit in person would be beneficial to our understanding of their special needs—and a lot of fun. Nigel most magnanimously offered us the guest room in his lovely home where we got to meet his lovely wife Sue, his enchanting daughters and his enthusiastic canine companions. After indulging in quintessentially British experiences like walking the dogs on the Thames and having lunch in a pub, we trained up to London (which was pretty quintessential too) and met with some of our current and prospective users at a meeting hosted by the West London Synagogue. E-mail is great, but there's nothing like a face to face contact, and it was wonderful to get to meet so many of our British users. We explained the new features and took questions, and sometimes they answered each other's questions—especially Marcia from Leeds. The prize for most miles traveled undoubtedly goes to Mr. Kraven from the Glasgow New Synagogue. We relaxed in Bath for a few days and then headed back to the drier climes of central California, where Vic completed the coding for the Gift Aid and Deed of Covenant documentation. His next task: write a conversion program from Francs to Euros before January 1.



L-R: Nigel Cohen of Maidenhead Synagogue in the UK and Vic Rosenthal, (the ever awaited picture by all his fans!), Rakefet developer.



Rakefet in the UK



Pic 1: L-R: Eric, Ruth (Bournemouth) and Marcia (Sinai Synagogue, Leeds).

Pic 2: L-R: Jeanette (Maidenhead), Ruth (Bournemouth), Marcia (Sinai Synagogue), and Lise (Rakefet).

Pic 3: L-R: Alan and Mark (Nottingham Hebrew Congregation) with Lise.

**If you have any questions or suggestions
about the Rakefet News newsletter,
please contact Melissa (melissaw@rakefet.com).**