Rakefet Tutorial

This Rakefet tutorial was developed to help you get used to using the system. It is designed to be used with the Rakefet demo program. It does not attempt to lead you through all, or even most, of Rakefet's features. We suggest that you go through the tutorial while using the Help system whenever needed. You also received with your demo a booklet called QuickStart which addresses many issues in a question and answer format that we hope you will find helpful.

To start the program, click Start/Programs/Rakefet. On the screen you will see the main menu bar with the categories File, Reports, Special, Setup, Utilities, and Help. Underneath you will see four tabs: Database, General Ledger, Payables, and Jewish Calendar. The first three are the places where data is entered.

Database contains people's personal information: addresses, children, yahrzeits, and each family's financial transactions with the synagogue.

General Ledger contains the synagogue's expenses, plus income from sources outside your database (interest, rummage sales, etc.)

Payables is the part of the program where (if you have purchased the payables option) you record invoices and write checks.

The Jewish Calendar page is used for converting Jewish and Gregorian dates, getting lists of holidays, Torah portions, etc.

Setup

Before we enter a new family, let's look at the infrastructure. Go to Setup / Chart of Accounts. This is where you designate where your synagogue's money comes from and where it goes. There is a sample Chart of Accounts in the appendix of this manual. Your demo came equipped with a few income and expense accounts and a bank account numbered B01000. Click on Add and create a new account: give it a number and a description, say, 401000, Library Donations. Note that Rakefet will add enough zeros to fill the box, so all you have to do is type '401' and hit the Tab key. Link it to a bank account (use B01000) and indicate to what extent it is tax deductible. Click the Allow Donations box so that this account will accept payments that do not affect the family's balance. Click on the Help button to learn much more about the Chart of Accounts window that you are in now; and click the green link to the Help topic Planning Your Chart of Accounts to learn how to create a customized chart of accounts. Click Close to leave the Chart of Accounts Window.

Now let's set up some family codes. Go to Setup / Family Codes and click on Add. These codes describe the relationship of the family to the synagogue: member, prospect, affiliate, preschool parent. Since one family can have multiple codes, many congregations designate the dues-paying level here: family, single, senior, so that they can use our filter feature to assess each category the correct amount. Click Add and enter the description in the field below, making sure to check the box labeled Account if the synagogue will be receiving money from people with this code, and Member if it implies membership in the congregation. If you wish to add another code, click Add again. If you are through, you can click your mouse directly on the list of codes to save the last code; or you can click Close to save the last code and close the window. Click on the Help button to read more about using the Data Code Setup Window.

You can create Individual Codes similarly (Setup / Individual Codes) except that since billing is done by the family unit, you do not have to indicate if the code implies an account. People use this feature to track committee membership, Cohens, Levites, Sisterhood, blood type, professions--anything that applies to one member of the family but not necessarily to the spouse.

If you have a Religious School, go to Setup / Classes and create classes. A good discussion of class codes can be found in the Quick Start booklet. Click Add to get an empty window to add each new class. Note that the previous class is automatically saved when you add another one. When you are finished, click Close--the last class you entered will be saved.

Entering Families

At last we are ready to create some member families. Click on the Database tab. Click on the Add button on the right hand side of the screen. You will see a blank membership form. This is called the Database Detail Window, and you are looking at Family Page 1. The cursor will be on Family Name 1. Type in the last name. Your Tab key will take you to the next field, Member 1 First Name, or you can click on it. Continue tabbing or clicking with the mouse to fill in the rest of the information. Fill in Title only if the person wishes to be known by his title at all times. If you don't want the birthday list to indicate that it is "Mrs. Miriam Cohen's" birthday, leave the title blank, and she will be known as Miriam Cohen. If you wish to list the member’s name as Robert but you always call him “Bob,” list “Bob” in the Salutation; otherwise you can leave it blank.

Note: Complete dates can be easily entered by typing the front slash(/) between the month, date and year, rather than trying to click each component. You will see a drop down window to the right of each date field. If you click on it you will see a calendar set to today's date. The left triangle moves a month backward, the right one, forward. Clicking on the month or year in the top (blue) part of the calendar allows you to pick these from a list. You can click on any date to select it and close the calendar. If you click anyplace outside the calendar, it will close without changing the date. As you can see, this is not an efficient way to log in the birth date of your oldest member, but it is very helpful in other situations! For complete information on entering dates in Rakefet, go to Help / Search and look up Dates.

You can even include pictures of members. In Adding or Editing mode you click on the picture box on the right side of the window and select a JPG graphic. Note: We suggest that you first reduce the file size of JPGs before using them, in order to keep the size of your backups small. A JPG from a camera or scanner may be several MB in size; such a file can be reduced to minimal size for display in Rakefet and still look fine. You can do this with a graphic conversion program such as the free XNVIEW program: simply resize the file so that the largest dimension is 114 pixels.

When entering phone numbers, if you type in seven numbers, as soon as you tab out of the field, Rakefet will place a hyphen between the prefix and the suffix. If you type ten digits, the first three will be in parentheses. For any other configuration, use a period to indicate the break between area code, prefix and suffix. Search Help for Phone Numbers for details. Click on Member 1's Codes Rolodex box and double click on one or more individual data codes in the Available Codes box. This will move them to the Selected Codes box, which means that they are now associated with him. You can also click on Add a New Code to create additional codes from here, rather than going back to the Setup menu. Fill in Member 2's information as well. **You should not type the family name again unless it is different.**

Fill in the address information, tabbing from field to field. You will see that there are two lines available for the street address. This is helpful if someone lives at "Daughters of Miriam Home, 4702 Hazel Avenue." Most of the time you will not need the second line, or the country field.

If the person has a vacation home, you can click on the Secondary button and fill in the address, as well as the month and day range in which they will be staying there. If you are using the secondary address for a business address, you can use the optional second name, so that mail delivered there will say "Acme Corporation" instead of "Mr. and Mrs. David Cohen."

You can choose to send letters to either the primary address, the secondary address, or whichever is active at the time according to the dates you have selected. You can make a separate choice for statements and receipts. Thus you can have financial dealings with the family at their place of business and send yahrzeit notification to the home. The secondary address is also a good place to store the address of a non-custodial parent. Note that the primary address will always be displayed on the screen (unless you click the Secondary button), even if the secondary is active at the moment.

Family Title: What you put here will attach itself to a single last name and print out on labels and inside addresses of letters. For example "Dr. and Mrs. David" will attach itself to "Cohen" only if Miriam is not going by her maiden name or a hyphenated form. If there are two different last names, the program will not look at the family title field. If the family title is not entered, addresses will include first and last names, plus individual titles if they have been entered.

Family Salutation is what goes between the word "Dear" and the comma at the beginning of a letter. Dr. and Mrs. David Cohen, may be saluted as "Dave and Mimi." If you have not filled in a family salutation, the letter will proceed immediately from the inside address to the text.

For a full explanation of the way Rakefet uses titles and salutations in addresses and letters, search Help for Titles and Salutations.

Next, click on the Family Codes Rolodex box and assign one or more family codes, just like the individual codes. Remember that if you are going to have financial dealings with this family, you must give them at least one code that implies an account. You can now click on the Family 2 tab and record fax numbers, e-mail addresses, etc.

Financial Transactions

Now we can click on the Account tab and log in some charges, payments, and donations for this family. Click on Help and read the material under Accounts Page. To add a transaction, click Add and fill in the information, tabbing from field to field. The date field will default to today's date, which you can overwrite. The date is "sticky", so if you have back-dated one entry, the next entry will prompt you to that date. Let's give this person a Charge in 001000, Dues of $700, dated a month ago.

When you have finished typing the data for the transaction, you may click the Save button, and the entry will appear in the list of transactions at the top of the screen. The family's balance will now show as $700 in the box on the lower right. Now click Add again. This will give you a blank entry form to add another transaction. This time, enter a Payment of $350 made two weeks ago. Do you see his balance go down when you click on the top of the screen to post it? Click Add again and show a Donation to account 400000. This will not affect the family's balance. When you are finished adding transactions, clicking on Save, or clicking on any of the tabs (Family 1, etc.) will save the last transaction that you have entered, as will clicking Close to close the window (but don't close it now).

Children

Click on the file tab labeled Children and click Help to read the section called Children Page. Enter several children for this family, clicking on Add each time you wish to enter a new one and using the browsing triangles (the arrow buttons in the upper right hand corner of the window that look like VCR buttons) to move between children of a given family.

Yahrzeits

Click on the file tab labeled Yahrzeits. Read the Help topic called Yahrzeit Page. Now click Add and fill in the information on one or more yahrzeits. Close the entire Database Detail Window by clicking the Close button.

The demo comes with two yahrzeit templates, one for observance by the Jewish calendar, and one for observance by the Gregorian calendar. Try printing lists and letters (Reports / Yahrzeits) from the information you have input. An overview of the yahrzeit functions can be found in Help in the topic entitled Yahrzeit System.

Payables

Last we will pay some bills. If you are thinking about buying the Payables Option, you will want the read the topics Payables and Checkwriting as well as Payables Page in the Help file, and practice entering some invoices and turning them into checks. If you think you will be hand-writing your checks, practice logging them in directly on the General Ledger page.

Now that you have some data in place, you can run some reports. Since you are limited in a demo in the amount of data you can enter, we have included a sample of each report in the back of this manual.