



zapManager™

MODULE

AND

FEATURE

DOCUMENTATION

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INTRODUCTION TO ZAPMANAGER™

ZapManager is a general-purpose Record Management System that has several modules. Its main module is a Master Record Management Module that allows you to manage any kind of entity, for e.g. Customers, Vendors, Inventory, Exams, etc. The other modules handle the management of Payments, Communication, Tasks, Online signup, and CEU tracking etc.

The system is completely Web-based, supports the handling of Work Flow Management, and can be customized to meet your needs. What makes it unique from other management systems is how it simplifies the routine tasks of every staff member.

Its intuitive user interface, automatic and intelligent trigger mechanisms, integrated front-office (online services) and back-office (staff) operations, and powerful querying and reporting options has made ZapManager a favorite among its current customers.



The screenshot shows the ZapManager web interface. At the top left, the word "MANAGER" is displayed in a blue header. At the top right, the user is identified as "User: heather@cyzap". The main content area is divided into two sections. On the left, under the heading "Main Menu:", there is a list of menu items: "Create Record", "Search Records", "Reports", "Admin", "Logout", and "Help". Each item is underlined. In the center, there is a circular image showing a person's hands working at a desk with a computer keyboard and papers. On the right, under the heading "Quick Start:", there are four input fields labeled "Cert #:", "First Name:", "Last Name:", and "Activity ID:". Below these fields are two buttons: "Submit" and "Reset".

BENEFITS OF USING ZAPMANAGER™

THE BEST COMBINATION OF "CUSTOM" AND "PRE-PACKAGED"

ZapManager creates a new paradigm for Customer Relationship Management applications. It takes the best features of "pre-packaged" products where you have a set of application modules providing the standard core functionality. It takes the best features of "custom" products where you work with a development company to create software specifically tailored to your needs. ZapManager merges the core application modules while incorporating a customizable framework capable of handling your special business needs. This creates a low cost and easy to use business solution capable of handling all of your business requirements.

STAKEHOLDERS MAINTAIN THEIR OWN INFORMATION

Using the secure login interface, your clients/members can easily access their information. They can update their information and keep it current. This shifts the workload of information entry and maintenance from your staff to your customers. This frees up staff time previously spent gathering and updating customer information.



STAKEHOLDERS HAVE ACCESS TO THE INFORMATION 24/7

Your customers can access the system anytime, from anywhere in the world. All they need is a connection to the Internet. They have access to their information, appropriate reports, schedules, events, and anything else, all without assistance from your staff. This frees your staff from answering customer telephone calls and mail requests for information. With **zapManager**, your customers can access this information directly.

COMMUNICATIONS LOG AND IMPROVED CUSTOMER SERVICE

ZapManager contains a powerful communications management module. This tracks all the different communications with your clients, including telephone calls, office visits, emails, paper mailings, faxes, and personal visits. Your staff can quickly access the most up-to-date information while communicating with your customers. There is no time lag created while your staff searches for the latest customer information.

NO MORE NETWORK OR LOCATION HASSLES

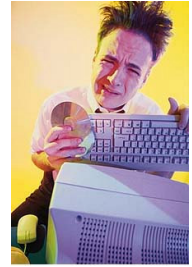
ZapManager makes use of the application-hosting model, where any computer with Internet connectivity and a current model web browser can instantly become a workstation. This allows you to maintain a single application across multiple offices in separate physical locations.

Management personnel can log onto the system, using the secure login feature, from any computer, anywhere in the world. This gives them instant access to real time reports and information. Your information is always current, always up-to-date.

Cyzap's state-of-the-art servers become your network. No more worrying about connecting workstations to the program or sending data across an unreliable network.

NO SOFTWARE TO INSTALL, UPDATE, OR MAINTAIN

The ZapManager application-hosting model offers you a faster implementation process. There is no software to install on your workstations, network, or servers. Cyzap performs application upgrades directly on the Cyzap server system. You never have to spend time installing upgrades, additional modules, or patches. This frees your IT staff from having to spend time setting up the application software and workstations.



YOUR APPLICATION RUNS ON A STATE-OF-THE-ART SERVER

Cyzap's server farm consists of high-end servers utilizing Intel based processor, ultra-speed hard drives, and an enterprise level multi-tape autoloader backup system. Your entire application and data files are backed up every four hours. You no longer need to maintain a backup system locally on your network. No more changing tapes and struggling with difficult backup software applications.

CYZAP'S UNPARALLELED CUSTOMER SUPPORT

Cyzap's helpdesk professionals are courteous, patient, and well versed with the technologies they support. Each customer's situation is handled with the highest level of professionalism and expertise. Your staff also interacts directly with the application programmers and designers. You receive guidance and support directly from the personnel most able to assist you. Online help, popup tips, and instructions are incorporated directly into the zapManager application. This makes ZapManager easy to use and understand, reducing the amount of outside support necessary for your day-to-day operations.



YOUR DATA IS SECURE

Cyzap operates a secure data-center with high-speed and redundant Internet connections. All Internet activity passes through Cyzap's Cisco PIX firewalls and is monitored by Cisco's Intrusion Detection System (IDS). Only standard and known services (usually HTTP and SSL) are allowed to pass through open ports. Other non-standard services must pass through a Virtual Private Network (VPN) connection.



IMPLEMENT A COST STRUCTURE THAT WORKS FOR YOUR BUSINESS

Cyzap offers variable pricing structures for zapManager. This allows you to select the most viable option for your business. ZapManager's modular design and implementation allow you to purchase only the modules necessary to create an application capable of running your business. You don't pay for application features you don't need or don't intend to use.

SEPARATE TRAINING AND DEVELOPMENT SYSTEMS

Cyzap maintains a separate development version of the application. This prevents you from experiencing problems or downtime during feature development. Cyzap can also setup a training system. This allows your staff to train on the same version of the software, in a real-time system, using a copy of real world data.

MASTER RECORD MANAGEMENT MODULE

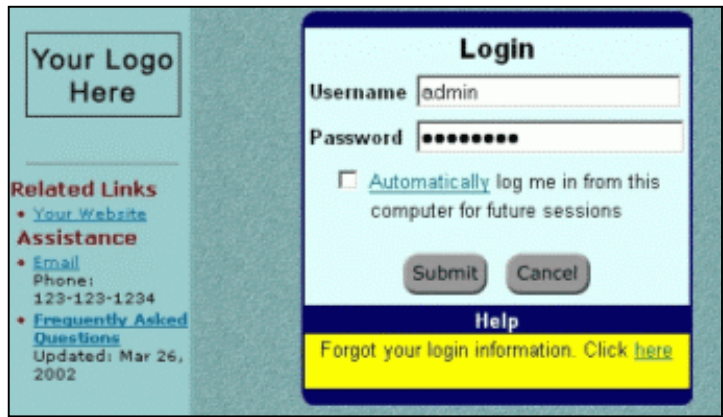
This module is a core component that can track any kind of 'master' record. Master records can be individual or company contacts or both, depending on requirements.

Each master record comes pre-configured with standard fields found in most contact and customer relationship management systems and can be easily extended with any number of custom fields to track complete information about the contacts. Depending on the system configuration, the contacts can refer to one or more type of stakeholders such as customers, prospects, members, employees, vendors, providers, etc.

1.1. User Based Login Authentication

Each user is assigned a unique username and password to access the system. The user accounts are configured with their own privileges, security levels, activity types, and preferences. Each transaction and activity is automatically tagged with the user account creating or updating that record.

The Login feature (which uses 128-bit SSL encryption technology) ensures that your data is secure at all times. Every page (even if it is book-marked or hyperlinked) undergoes user authentication.

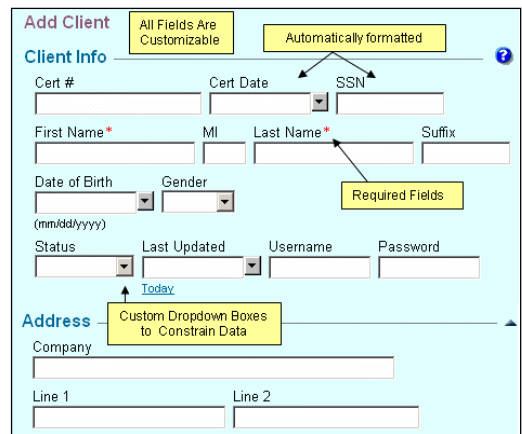


For additional security, a session timeout feature automatically logs a user out after a specified duration of inactivity. For more information, see the "Security module".

1.2. Manage Standard Master Record Information

The system comes pre-configured with tracking standard contact fields related to name (both individual and company), unique IDs (internal as well as external), demographics (DOB, Gender, Ethnicity, Marital Status), mailing address (including international addresses), contact methods (phones, fax, email, website), statuses, and notes.

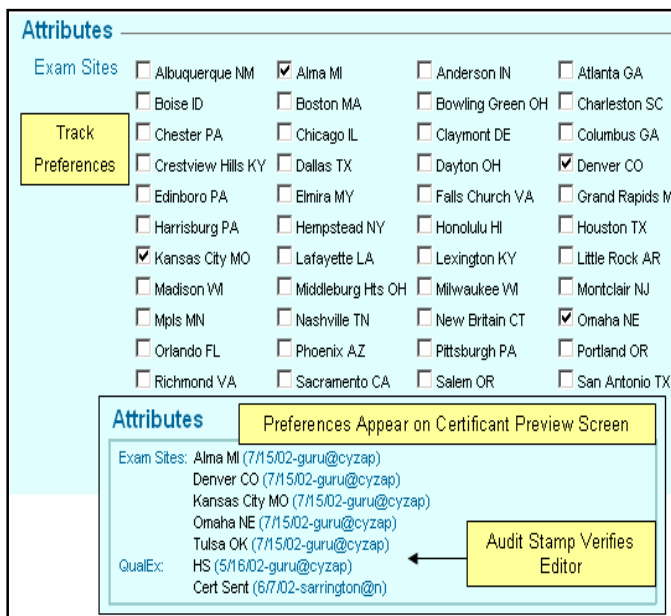
Record demographics, dates, status, and contact information through a straightforward data-entry screen designed separately for each type of stakeholder.



1.3. Profile Records With Yes/No Attributes

ZapManager can maintain any number of Yes/No check box fields (attributes) to track interests and preferences of your stakeholders.

ZapManager also automatically tracks who set the attribute and when the attribute was set. You can then query records on the presence or absence of one or more attributes and create reports, send emails, or perform batch updates on that selected group



Attributes

Exam Sites

<input type="checkbox"/> Albuquerque NM	<input checked="" type="checkbox"/> Alma MI	<input type="checkbox"/> Anderson IN	<input type="checkbox"/> Atlanta GA
<input type="checkbox"/> Boise ID	<input type="checkbox"/> Boston MA	<input type="checkbox"/> Bowling Green OH	<input type="checkbox"/> Charleston SC
<input type="checkbox"/> Chester PA	<input type="checkbox"/> Chicago IL	<input type="checkbox"/> Claymont DE	<input type="checkbox"/> Columbus GA
<input type="checkbox"/> Crestview Hills KY	<input type="checkbox"/> Dallas TX	<input type="checkbox"/> Dayton OH	<input checked="" type="checkbox"/> Denver CO
<input type="checkbox"/> Edinboro PA	<input type="checkbox"/> Elmira NY	<input type="checkbox"/> Falls Church VA	<input type="checkbox"/> Grand Rapids MI
<input type="checkbox"/> Harrisburg PA	<input type="checkbox"/> Hempstead NY	<input type="checkbox"/> Honolulu HI	<input type="checkbox"/> Houston TX
<input checked="" type="checkbox"/> Kansas City MO	<input type="checkbox"/> Lafayette LA	<input type="checkbox"/> Lexington KY	<input type="checkbox"/> Little Rock AR
<input type="checkbox"/> Madison WI	<input type="checkbox"/> Middleburg Hts OH	<input type="checkbox"/> Milwaukee WI	<input type="checkbox"/> Montclair NJ
<input type="checkbox"/> Mpls MN	<input type="checkbox"/> Nashville TN	<input type="checkbox"/> New Britain CT	<input checked="" type="checkbox"/> Omaha NE
<input type="checkbox"/> Orlando FL	<input type="checkbox"/> Phoenix AZ	<input type="checkbox"/> Pittsburgh PA	<input type="checkbox"/> Portland OR
<input type="checkbox"/> Richmond VA	<input type="checkbox"/> Sacramento CA	<input type="checkbox"/> Salem OR	<input type="checkbox"/> San Antonio TX

Track Preferences

Attributes Preferences Appear on Certificant Preview Screen

Exam Sites: Alma MI (7/15/02-guru@cyzap)
 Denver CO (7/15/02-guru@cyzap)
 Kansas City MO (7/15/02-guru@cyzap)
 Omaha NE (7/15/02-guru@cyzap)
 Tulsa OK (7/15/02-guru@cyzap)

QualEx: HS (5/16/02-guru@cyzap)
 Cert Sent (6/7/02-sarrington@n)

Audit Stamp Verifies Editor

1.4. Attach Image(s) with Each Master Record

ZapManager allows you to store a photograph with each stakeholder record.

Photos can be easily included on cards, documents, and rosters.



Photo

Photo

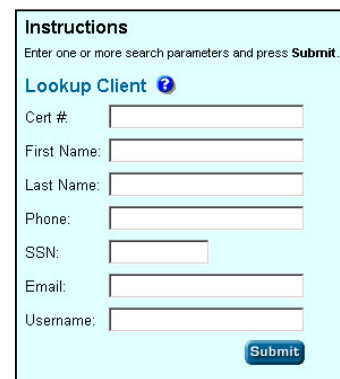
Attach a Photograph to a Certificant's Record

1.5. Quick Search and Advanced Lookup Capability

Quick search feature allows you to locate a record from any screen of the system.

Advanced lookup function allows you to find records by any key field such as first name, last name, company name, ID, phone, email, or any other configured field.

If more than one matching record is found then the system displays a summary of those records and allows you to select any record.



Instructions

Enter one or more search parameters and press **Submit**.

Lookup Client ?

Cert #:

First Name:

Last Name:

Phone:

SSN:

Email:

Username:

Submit

1.6. Customizable Field Captions and Enforcement of Required Fields

The captions and layout of all standard fields can be easily customized to match your exact needs. You can define any set of fields as required. Fields defined as "Required" will have a red asterisk placed next to the caption. The system then automatically warns users if they try to save a record without filling-in a required field. The record will not be saved if the required field is left blank.

In this system, the heading of the section is "Client Info", the caption of the main ID field is "Candidate ID", and the First Name, Last Name, and DOB are required fields.

This system is tracking the Gender, Ethnicity, and Marital Status fields for the records.

In this system, the heading of the section is "Personal Info", the caption of the main ID field is "Contact ID", and only the First Name and Last Name are required fields.

This system is not tracking the Gender, Ethnicity, and Marital Status fields.

1.7. Auto Formatting of Most Fields

The system automatically formats the entered data based on the type of the field. For example, the system will automatically capitalize the first letter of the First and Last Name, add a hyphen in a 9-digit zip code, and put the full year for the dates.

Auto-formatted telephone number, postal code, SSN, and date fields achieve rapid data entry. For example, 07/12/02, 07/12/2002, 71202, 071202, or 07122002 will be recognized as July 12, 2002.

Data entry errors are reduced with customizable validation rules and field constraints.

1.8. Context Sensitive Menu Structure

The system tracks the state of each screen and automatically provides links and options based on the context. For example, if you are on a particular contact record, then you will automatically see three most recent pending and completed transactions related to that record. You will also know what actions you can take with that record based on the status of the record and your security privileges. This intelligent feature ensures that the most relevant and up-to-date information is always at your fingertips.

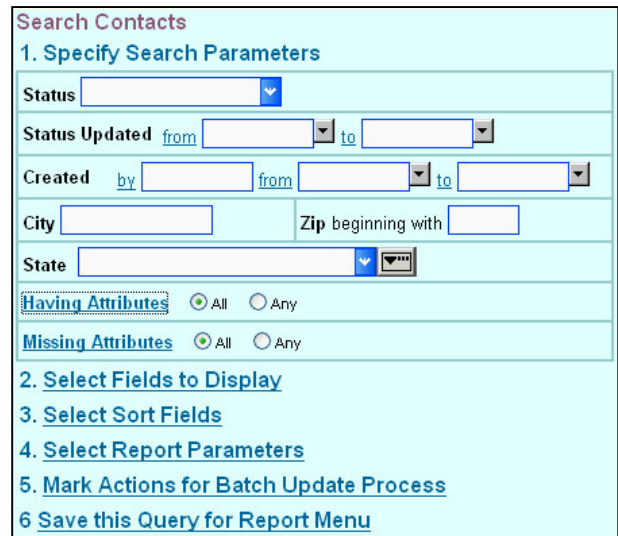


1.9. Powerful Query Interface

You can query records on any combination of fields through an intuitive query form.

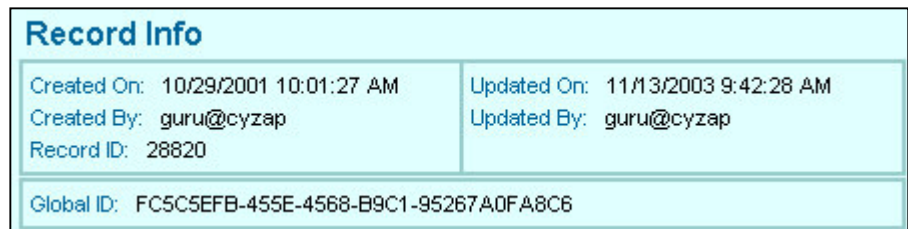
Simply specify one or more search parameters, select the fields you want to be displayed, and choose how you want to sort your results. For unique custom searches, you can also add on SQL-formatted criteria against any of the database fields.

Query results can be printed, viewed on-screen, or exported to a text file.



1.10. Automatic Record Creation and Update Time Stamps

The system automatically keeps track of when a record was created or updated and by whom. You can use this data for auditing and querying records.



1.11. System-wide Unique Value Check on One or More Fields

The Unique Value Check feature allows you to ensure that a particular set of fields (ID, SSN, email address etc) always contains a unique value for each record.

The system will present a warning anytime you try to enter a duplicate value in any of the unique fields (or field combinations).

The record of Guru Pahwa Cyzap cannot be saved because another record with Cert #: 123456789 already exists in the system.

In other words, the system would allow you to have two records with the same First Name or the same Date of Birth, but it will not allow two records with the same First Name or Date of Birth. Through this feature, you can add enough checks and balances to prevent users from adding the same record twice.

1.12. Open Architecture to Allow Complete Customization

The system supports an object-oriented architecture that allows its functionality to be extended by adding custom fields, validation rules, screen layout changes, and custom code. In other words, the system is made to work around your business processes and not vice versa.

In addition, the appearance of the application can be customized to include your own logo, title, and specified links.



1.13. Automatic Audit Trail of Record Changes

This powerful feature allows the system to automatically keep track of any changes made to a record. For example, when changing an address, the system will automatically identify what portion of the address got changed and store the old and the new values in the history log file. You can even add remarks to the log entry to identify why the changes were made.

The audit log is also maintained when the stakeholder updates designated sections of his/her own record through the online self-service component. The audit log can be reviewed or queried at any given time.

NB-SYS_UPDATE-8196 Guru Pahwa
(Completed)

Created: heather@cyzap (7/15/2002 2:00:42 PM) Last Updated: heather@cyzap (7/15/2002 2:00:42 PM)

Message	Last Response	History	Create Followup
Contact Type: Email From Client Request: Address Change			
Cert # changed to 123456788 SSN changed to 111111111 Company changed to Cyzap GenderCode changed to M Line 1 changed to 7811 L Street Suite 230 City changed to Omaha State changed to NE Postal Code changed to 68127			
			PRINT

Changes to Records can be viewed under Certificant Activity

1.14. Data Quality Analysis Reports

The system allows you to generate special reports that highlight any inconsistencies in your data. For example, you can quickly see if there are records with no SSN entered or if there are addresses with missing zip codes.



Reports

Candidates

- Data Quality Analysis
 - [No SSN](#) (526)
 - [No City](#) (1443)
 - [No Zip](#) (1444)
 - [No Work Phone](#) (5655)
 - [No Line 1 \(Street or PO Box\)](#) (1443)
 - [No State](#) (1454)
 - [No Home Phone](#) (1465)
 - [No Email](#) (1929)

Pending Memos - 169

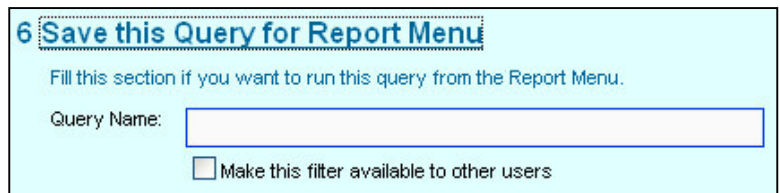
- [All](#) · [Mine](#) · [Contact Type](#) · [Request Type](#)

Payments

- [Today](#)
- [Yesterday](#) (19)
- [This Month](#) (568) · [Last Month](#) (724)
- [This Year](#) (8563) · [Pending](#) (62)

1.15. Save Queries as Memorized Reports

This feature allows you to save any query created through the built-in query interface as a link on the report menu. Saved queries can be edited at any time. You can even mark a saved query as either public or private.



6 Save this Query for Report Menu

Fill this section if you want to run this query from the Report Menu.

Query Name:

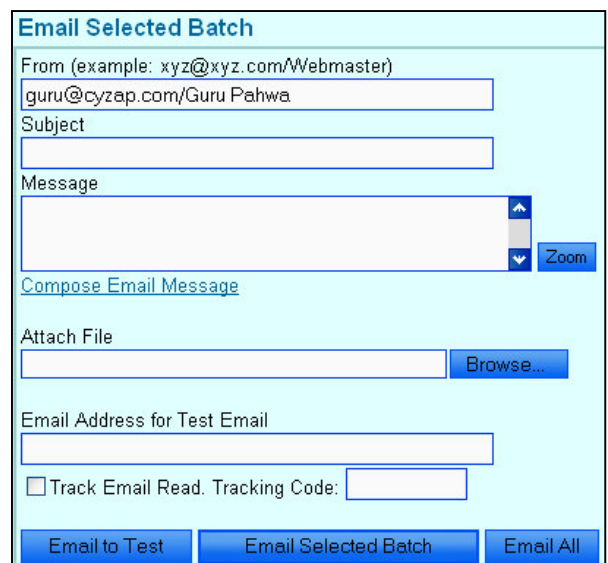
Make this filter available to other users

Public saved queries become available to all users while a private query is only available to the user who created that query. This feature proves useful when you frequently query the system with the same parameters.

1.16. Send Batch Emails

You can send personalized and targeted emails to any selected list of stakeholders. The emails can be formatted as text or HTML. You can attach files, embed images, and include mail-merge fields with each email. The emails are sent one at a time to ensure that they are not treated as SPAM. Also, no recipient gets to know about other recipients.

The "test email" feature allows you to send an email sample to yourself or any other email address before you send it to the entire batch. This helps ensure your emails are accurate and formatted correctly before they are sent.



Email Selected Batch

From (example: xyz@xyz.com/Webmaster)

Subject

Message

[Compose Email Message](#)

Attach File
 [Browse...](#)

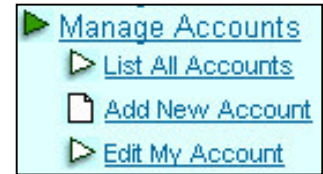
Email Address for Test Email

Track Email Read. Tracking Code:

[Email to Test](#) [Email Selected Batch](#) [Email All](#)

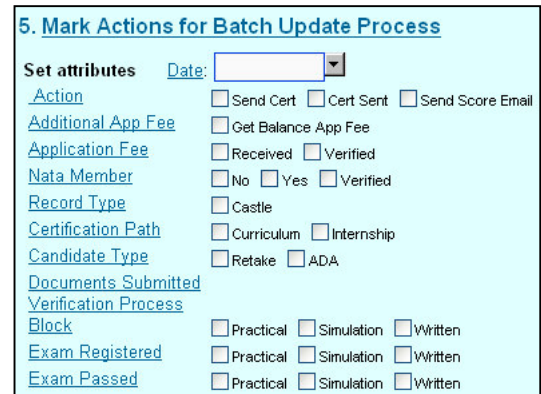
1.17. User Account Administration

This feature allows any user with an Administrative role to create additional user accounts and modify or suspend any account. Please note that you may have to pay additional license fee if additional user accounts are added.



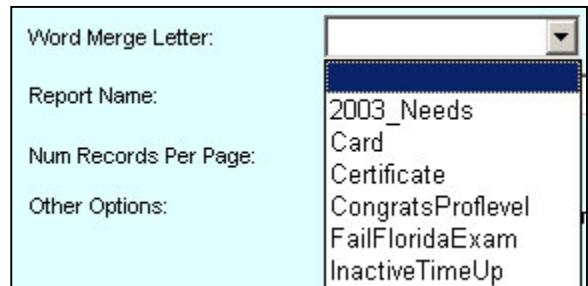
1.18. Perform Batch Updates

Records produced by the query interface can be updated simultaneously through the Batch Update feature.



1.19. Microsoft® Word Mail-Merge Option

This option links the system with Microsoft Word and is required in order to perform Word mail-merge operations directly through the system.



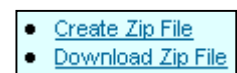
1.20. Create Mailing Labels or Export to Excel™

This feature allows you to create mailing labels of records produced through the system's built-in query interface. The Export to Excel feature allows you to export the query results in Microsoft Excel format.



1.21. Secure Download of Entire Data in Access Format

This feature allows authorized users to securely download the data anytime from the system. The downloaded data is in Microsoft Access Database format and can be used for generating custom reports using Microsoft Access or any off-the-shelf reporting tool like Crystal Reports.



PAYMENT MANAGEMENT MODULE

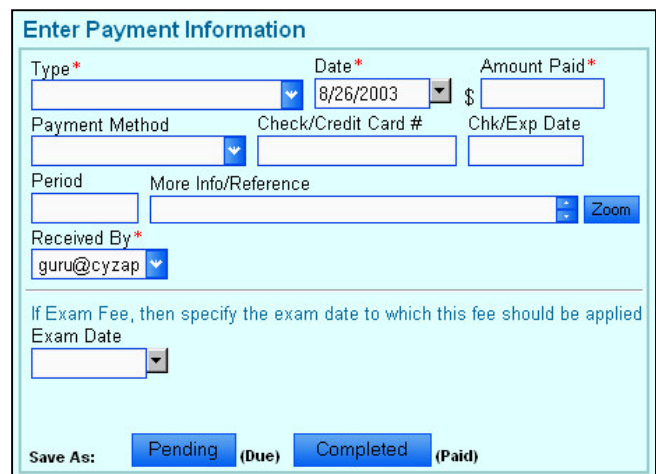
This full-featured module allows you to track payments and dues associated with each master record. At minimum, each payment transaction includes information related to the type, date, amount, payment method, and the user who entered the payment. You can apply one payment to multiple payment types, print sales receipts, and process credit card payments in real-time. Payments made via the online self-services can also be tracked through this module.

If accounting features are enabled, then appropriate General Ledger accounts are automatically attached to each payment record based on payment type and method. The GL Posting report allows you to extract and post GL account entries into your current accounting software. The module can even be configured to support special payment methods (such as gift-certificates) and differentiate payments based on how they came in (for example, checks that were deposited via lock box versus the ones that were deposited physically).

2.1. Track Payment Information

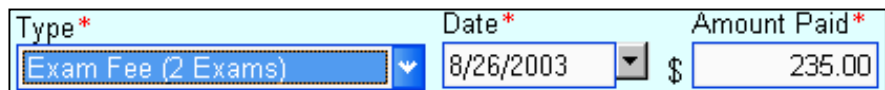
Payment information can be tracked by type, date, amount, method, check/credit card number, reference information, and received by.

The system allows you to enter unlimited payments for each master record and to list payment history by master record.



2.2. Automatic Entry of Payment Amount based on the Payment Type

With this feature, the system automatically looks up and fills-in the payment amount when you select the payment type in the payment-entry screen.



The module administrator can associate the payment amount to the payment type through the administration interface.

2.3. Configure Different Fiscal Year Period for Yearly Comparison Reports

This configuration option allows you to generate the Payment Summary and Comparison Report based on your fiscal year period. By default, the comparison report assumes your fiscal year to be the same as the calendar year.

2.4. Track Payment Period

This feature allows you to associate the period for which the payment was made. This is especially useful when tracking recurring payments. The system can also be configured to automatically enter the default period based on the current date.

Payment Type	Amount	Period
<input checked="" type="checkbox"/> App Fee (NATA Member) (\$35):	35.00	2003
<input type="checkbox"/> App Fee (non NATA Makeup) (\$25):		
<input type="checkbox"/> App Fee (non NATA) (\$60):		
<input checked="" type="checkbox"/> Exam Fee (1 Exam) (\$190):	190.00	2004

2.5. List payment history by Master Record

This feature lets you see the entire payment transaction history associated with any contact record. Click on a transaction record displays the details of that transaction.

Past 15 Transactions	
S	Summary
✓	Exam Fee (3 Exams)-2003: \$2
✓	Reschedule Fee-2003 - \$100
✓	Reschedule Fee - \$100
✓	02/21/03 App Fee (NATA Mem

2.6. Powerful Query Interface

You can query records on any combination of payment fields through an intuitive query form. Simply specify one or more search parameters, select the fields you want to be displayed, and choose how you want to sort your results.

For unique custom searches, you can also add on SQL-formatted criteria against any of the database fields.

PAYMENT Search

1. Specify Search Parameters

NBC-PAYMENT:

Status Pending Completed

Type

Handled by from to

2. Select Fields to Display

3. Select Sort Fields

4. Select Report

Report Name:

5. Select Report Parameters

6. Mark Actions for Batch Update Process

7 Save this Query for Report Menu

2.7. Real Time Credit Card Processing

This feature allows you to process credit card payments in real-time via secure Payment Gateways. The authorization and approval codes returned by the Gateway are automatically attached to the payment record.

Payment Method	Check/Credit Card #	Chk/Exp Date
Credit Card Visa	1234567890123456	05/05
Period	More Info/Reference	
2003	<input type="text"/> <input type="button" value="Zoom"/>	
Received By*		
iguru@cyzap	<input type="button" value="Authorize Payment Via Verisign"/>	

2.8. Reports

The built-in payment reports allow you to extract relevant information and integrate it with your standard business processes.

- **Payment Receipt Report:** Allows you to quickly print a receipt for any payment transaction.
- **Bank Deposit Report:** Allows you to generate transaction summary for creating bank deposits.
- **Bank Reconciliation Report:** Allows you to print transaction summary by date and deposit type and match it with your bank statement. If you notice a mismatch, then the drill-down features of the report allow you to quickly find the cause.
- **General Ledger Report:** Allows you to generate the revenue summary by GL accounts of all un-posted transactions. Once you input the GL entries into your accounting software (manually or via import/export), you can mark the transactions as posted through this report. You can recreate the details of the posted batch at any time through the query interface.
- **Payment Summary and Comparison Report:** This report allows you to analyze and compare your revenues by payment type and year.

Payments

- [Today \(2\)](#) · [Yesterday \(33\)](#)
- [This Month \(472\)](#) · [Last Month \(1267\)](#)
- [This Year \(11022\)](#) · [Pending \(81\)](#)
- [Pending Refunds](#)
- [General Ledger To Be Posted](#)
- [Bank Reconciliation](#)
- [Payment Summary Report By Type](#)
- [Transaction Report-Advanced](#)

2.9. Quick Links to List Payments Received

The system has Quick Links for viewing payments for Today, Yesterday, This Month, Last Month, This Year, and Pending payments.

Each Quick Link has the option to drill down to specific payments types or methods. This allows you to quickly get to the information you need.

· [This Month \(568\)](#) · [Last Month \(724\)](#)

This Month Payments by Type

- [Credit Card](#)
- [Check and Non Credit Card Deposits](#)
- [Refunds and Credits](#)

AT

- [App Fee \(NATA Member\) \(39\)](#)
- [App Fee \(non NATA\) \(44\)](#)
- [Credit \(7\)](#)
- [Exam Fee \(1 Exam\) \(239\)](#)
- [Exam Fee \(2 Exams\) \(140\)](#)
- [Exam Fee \(3 Exams\) \(56\)](#)
- [Exam Fee Balance \(1 to 2\) \(28\)](#)
- [Exam Fee Balance \(1 to 3\) \(11\)](#)
- [Exam Fee Balance \(2 to 3\) \(2\)](#)
- [Reschedule Fee \(2\)](#)

2.10. Handle Payment Splits (Multiple Payments Types with One Payment)

This powerful feature allows you to apply a payment to multiple payment types in one go. You enter the total amount received and then click the applicable payment types from the given list.

The system intelligently enters the appropriate amount for each payment type.

1. Enter Payment Information

Amount* Date* Received By*

\$ 225.00 11/15/2003 guru@cyzap

Payment Method Check/Credit Card # Chk/Exp Date

Check 1234 10/17/03

More Info/Reference Zoom

2. Select Applicable Payments

General

Payment Type	Amount	Period
<input checked="" type="checkbox"/> App Fee (NATA Member) (\$35):	35.00	2003
<input type="checkbox"/> App Fee (non NATA Makeup) (\$25):		
<input type="checkbox"/> App Fee (non NATA) (\$60):		
<input checked="" type="checkbox"/> Exam Fee (1 Exam) (\$190):	190.00	2003

2.11. Manage Dues, Under Payments, Over Payments, Refunds, and Credits

- Dues are pending payments that have not been paid: You can create dues for any payment type and later apply the received payment to those dues.
- An Under Payment scenario occurs when you receive a payment with an amount less than the expected amount. In that case, the system automatically prompts you to create a due record with the balance amount.
- An Over Payment scenario occurs when you receive a payment with an amount greater than the expected amount. In that case, the system automatically prompts you to create a credit or refund record.
- A Refund is a payment record with a negative amount. The system allows you to generate a report of refunds that need to be processed. Once the refund checks are issued, the refund records as marked as processed.
- A Credit is a due with a negative amount. You can apply the credit to any current due record or when you receive an under payment.

2.12. Payment Administration Interface

This interface allows you to setup payment types and their default amounts and GL accounts. If you are dealing with a large number of payment types, you can organize them into different payment sections. But the most powerful feature of this interface is that it allows you to configure triggers for each payment type.

A trigger is a specific update action that the system automatically performs based on the type of payment received. For example, you can set a trigger to update the status of the stakeholder to Active when a renewal payment is received.

2.13. Export GL Payment Information to QuickBooks

This feature enables you to export the GL Posting summary to QuickBooks IIF format.

The export GL payment option can be customized to format the data as needed by other accounting packages.

Current Transactions Group:		
Account	Credit	Debit
Chapter Dues	\$115.00	
Deferred Income - Prepaid Dues	\$770.00	
Deferred Income-Conference:3210 Sunday Seminar on Wheels	\$50.00	
Deferred Income-Conference:3310 Registration	\$325.00	
Deferred Income-Conference:3450 Exhibitor	\$1,900.00	
Deferred Income-Conference:4180 Seminar on Wheels	\$50.00	
Donations to SAFE	\$5.00	
SAFE Golf Tournament Wed.	\$125.00	
US Bank - Checking		\$3,340.00
Total	\$3,340.00	\$3,340.00

[Show Transaction Details](#) [Export Ledger Entries](#)

2.14. Setup of Online Merchant Account

In this option, our team helps you in acquiring the most cost-effective online merchant account. You may even get better credit card rates than your current account.

MEMO (COMMUNICATION MANAGEMENT) MODULE

This module allows you to log communication threads between you and your stakeholders by creating electronic memos. Electronic memos are conceptually equivalent to the paper memo-pads in that they let you track who, when, and how the contact was made and what was the nature of the request. You can have multiple memos associated with the same stakeholder.

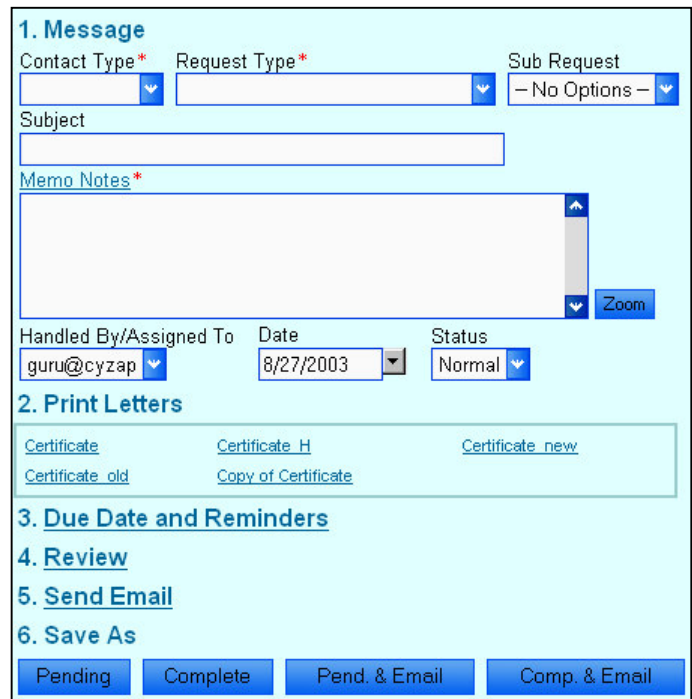
But the functionality does not end there. An e-memo can be assigned to any staff user with a priority level, marked as pending or completed, and be given a due date with an email reminder option. Powered with these and other advanced functions, the Memo module provides a robust framework for handling all your request and communication management needs.

3.1. Track Communication Info for each Master Record

ZapManager provides tools for tracking and managing the flow of communication regarding each Master Record.

You can track communication information by contact type, request type, subject, description/notes, handled by, date, status, due date, and reviewer.

The system allows unlimited memos for each master record.

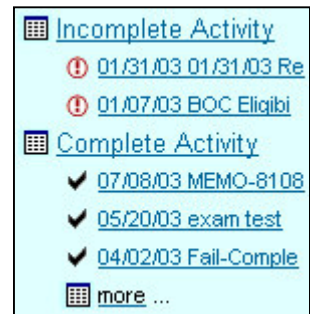


1. Message
 Contact Type* Request Type* Sub Request
 [Dropdown] [Dropdown] [Dropdown: - No Options -]
 Subject
 [Text Field]
 Memo Notes*
 [Text Area] [Zoom]
 Handled By/Assigned To Date Status
 [Dropdown: guru@cyzap] [Dropdown: 8/27/2003] [Dropdown: Normal]
2. Print Letters
[Certificate](#) [Certificate H](#) [Certificate new](#)
[Certificate old](#) [Copy of Certificate](#)
3. Due Date and Reminders
4. Review
5. Send Email
6. Save As
 Pending Complete Pend. & Email Comp. & Email

3.2. Track Memo Status (Pending/Completed)

All memos have a status field that can be set to pending or completed. Pending memos act as requests that still need to be fulfilled while completed memos signify requests or communication thread that has ended.

A sub-status (or level) field allows you track how the request or communication ended when the memo was marked as completed.



Incomplete Activity
 01/31/03 01/31/03 Re
 01/07/03 BOC Eligibi
Complete Activity
 07/08/03 MEMO-8108
 05/20/03 exam test
 04/02/03 Fail-Comple
 more ...

3.3. Create Follow-ups and Update Status / Levels

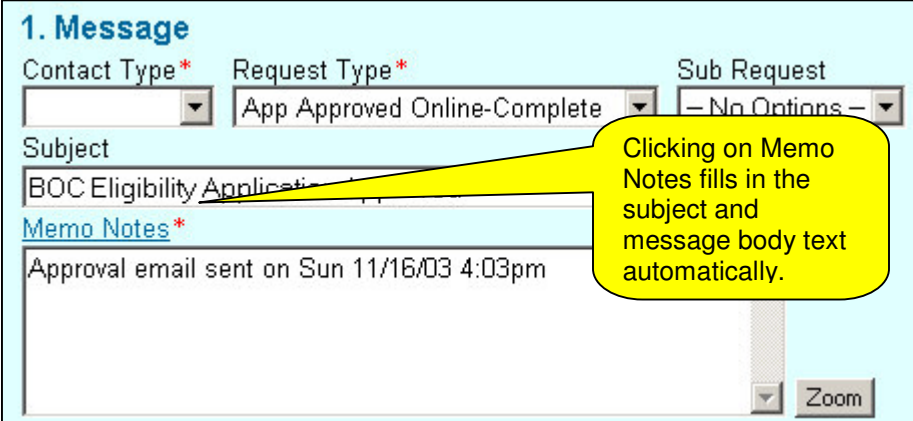
You can update the status and level of a memo by creating a follow-up note. When you review a memo, you get to see a history of all follow-ups thereby ensuring that you never miss any piece of communication.



3.4. Automatic Entry of Memo Note, based on the Request Type

This feature makes the system automatically enter a standard message text in the memo based on the type of request.

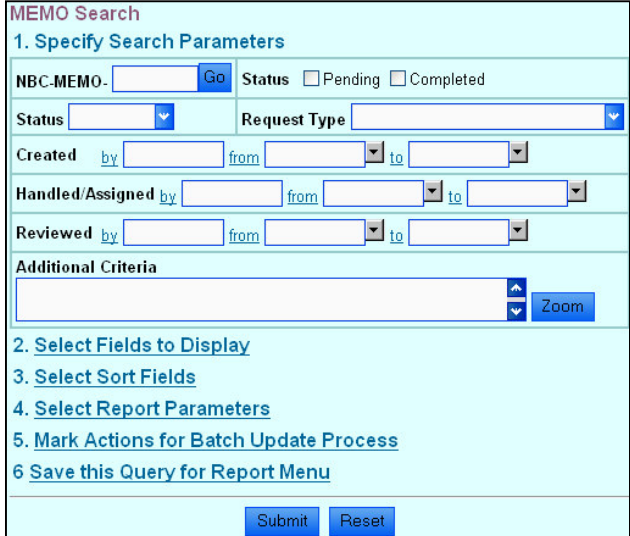
The standard message text can also merge information from other fields. This feature helps streamline the process of creating memos.



3.5. Powerful Query Interface

You can query memos on any combination of fields through an intuitive query form. Simply specify one or more search parameters, select the fields you want to be displayed, and choose how you want to sort your results.

For unique custom searches, you can also add on SQL-formatted criteria against any of the database fields.



3.6. List Memo history by Master Record

This feature lets you see all the memos associated with any contact record in chronological order. Click on a memo displays the details of that memo and associated follow-ups.

S	Asm ID	Created
<input type="checkbox"/>	NBC-MEMO-9609	08/27/03
<input checked="" type="checkbox"/>	NBC-MEMO-8108 Email App Approved Paper-Complete	07/08/03
<input checked="" type="checkbox"/>	NBC-MEMO-5512 Email Other exam test	05/20/03
<input checked="" type="checkbox"/>	NBC-MEMO-842 Other Fail-Complete Fail-Complete on 4	04/02/03

3.7. Reports

You can produce many kinds of reports to process pending memos as per your workflow management environment.

For example, you can list pending memos by user, by due date, or by request type. Completed memos reports help you analyze what types of communication your organization is handling.










All Pending Memos By Review Date			
Criteria: Status: Pending / Tool: Memo			
S	MessageAndLastFollowup	Assessment_ID	Handled/Review
<input checked="" type="checkbox"/>	Email Other Normal Exam Sites & Dates 03/17/03- Cancelled the Apr exam, wants to reschedule but... <input type="checkbox"/>	MEMO-5776 Jason A Low	05/28/03 sleftwich@nataboc
<input checked="" type="checkbox"/>	Mail Other Normal CPR Card Need to sign CPR card	MEMO-7866 Kendra Walker	07/01/03 sleftwich@nataboc
<input checked="" type="checkbox"/>	Phone Other Normal Exam Ticket Problem 6/3/03 - Line busy, 4:35 PM. No e-mail address	MEMO-6789 Gilbert LeFort II	06/03/03 jpluta

3.8. Quick Links to Generate Word Mail Merge Letters

For memos that require you to mail a formal letter, this feature allows you to generate those letters right from the memo screen.

The mail-merge feature of the Master Record Management Module must be enabled for this feature to work.

NBC-MEMO-5776

-  [Review](#)
-  [Print View](#)
-  [Create Followup](#)
-  [Edit MEMO](#)
-  [Delete MEMO](#)
-  [Additional Fee](#)
-  [APP Denial Notice](#)
-  [APP Denial Return](#)
-  [ADA Denial Letter](#)

Mail Merge Letter Links

3.9. Receive Email Reminders (Standard / Urgent) for Pending Memos

This feature allows you to assign a due date with a reminder timeframe to any memo.

If the memo is not completed within the reminder timeframe then a standard reminder email is sent to the user handling the memo.

2. Due Date and Reminders

Due Date Standard Reminder days before due Urgent Reminder! days before due date

The system emails an urgent reminder if the memo is not completed by the due date. Additionally, the system also emails a notification to the user assigned as the 'reviewer' of the memo.

3.10. Automatic Generation and Sending of Emails based on Request Type

This powerful feature allows you to send pre-formatted emails to the contact record based on the type of request.

With this feature, you can email product information, status-updates notifications, and any other standardized messages at the same time you are logging the communication.

5. Send Email

From:

To: Candidate Handler Reviewer

Bcc:

Use format: email1@company.com,email2@company.com

Subject: [Copy Memo Subject](#)

Body: Header

Memo Notes Memo Status

Footer

[Review Email](#)

3.11. Track Sub-Requests specific to each Request Type

This feature allows you to track memos at two hierarchical levels (requests types and corresponding sub-request type) for detailed analysis of your communication logs.

1. Message

Contact Type* Request* Sub Request

Subject

[Memo Notes](#)

Handled By/Assigned To Date

AK-Alaska

AL-Alabama

AR-Arkansas

AS-American Samoa

AZ-Arizona

BC-British Columbia

CA-California

CO-Colorado

CT-Connecticut

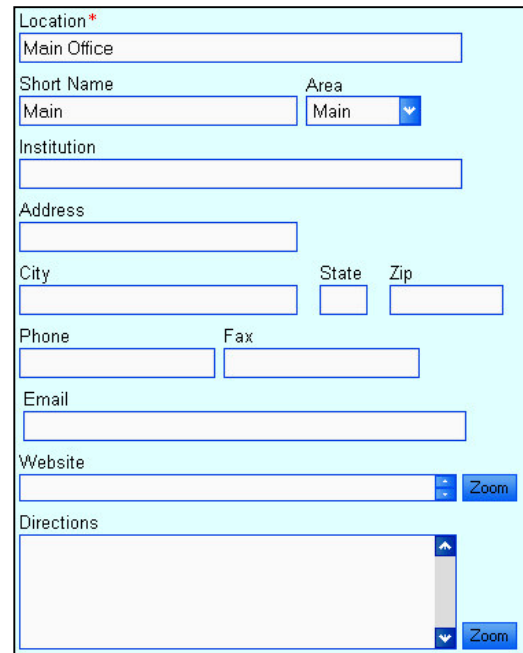
DE-Delaware

SIGNUP (REGISTRATION MANAGEMENT) MODULE

This module allows you to setup events and their registration parameters. An event can be of any type and can occur on multiple dates and locations. A calendar of upcoming events is automatically displayed through your Website and a registration form is presented based on your registration parameters.

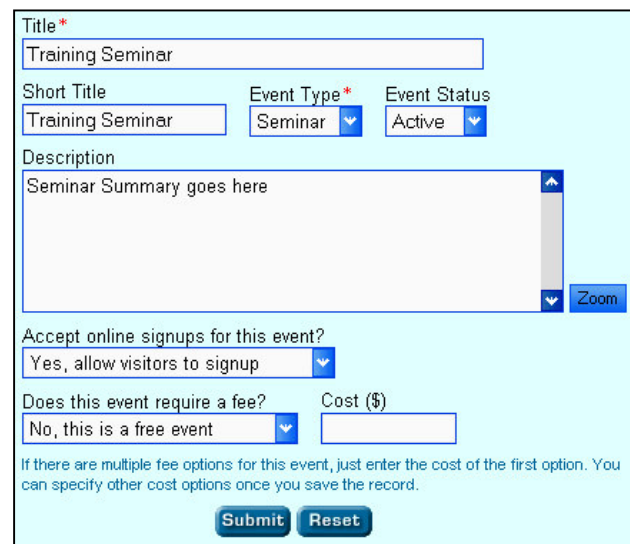
4.1. Maintain Registration Sites (Locations)

This feature allows you to maintain one master database of registration sites with all the pertinent information such as name, address, contact information, and directions. Each site gets its own unique location code.



4.2. Setup Registration Events

This feature allows you to define your events and all related information such as dates, locations, and timings. You can also indicate if an event is open for signups with any additional signup constraints such as number of time slots and maximum number of registrations per time slot.



4.3. List Upcoming Events by Date

This feature allows you to publish a calendar of upcoming events in chronological order.

Date	CEUs	Event	Location	Fee
Sun, Nov 16	6.75	17th Annual Family Practice Weekend & Sports Medicine Conference P657	Huntington, WV	General Admission: \$60.00
Thu, Nov 20	28	Part A: Lumbar Spine P931	Minneapolis, MN	General Admission: \$599.00
Thu, Nov 20	1	Knee Brace Design and Fitting P2889	Stillwater, OK	General Admission: \$10.00

4.4. Customizable Event Signup Framework

With this framework, the entire event registration process can be customized to match your exact business process.

Choose your Event

You are viewing: All Events open for Signup
Sort Events By: [Date](#) / [Event Name](#) / [Location](#)

Jump To: [All Events](#)
Month: [Aug](#) · [Sep](#) · [Oct](#) · [Nov](#) · [Dec](#) · [Jan](#) · [Feb](#) · [Mar](#) · [Apr](#) · [May](#) · [Jun](#) · [Jul](#)
Type: [Seminar](#) · [Wellness](#)
Service: [Flu Shots](#) · [Health Screening](#) · [Seminar](#)
Area: [Downtown](#) · [Main](#)

Date	Event Name	Location	%Full	Signup
Thu, Aug 28	Annual Benefit Enrollment Seminar	Main Office	■	Signup
Fri, Aug 29	Annual Benefit Enrollment Seminar	Main Office	■	Signup
Mon, Sep 1	Cholesterol Screening	Downtown Office	■	Signup
Tue, Sep 2	Flu Shots	Main Office	■	Signup

4.5. Print Registration Roster

A detailed listing of all event attendees is available for all events.

Event Information

When: 7/17/2003 (Thursday)
 Where: Westside Community Conference Center

Service	Room
Seminar	3534 S. 108th Street Lighthouse Suite

Time	F Name	L Name	Company
08:30 am	Stacey	Kozisek	SilverStone Group
08:30 am	Alice	Norris	Methodist Health System
08:30 am	Howie	Halperin	Wellness Council
08:30 am	Katie	Jennings	Wellness Council
08:30 am	Cheri	Renfrow	Methodist Health System
08:30 am	Amy	Kistatis	Securities America, Inc.
08:30 am	Theresa	Hager	ADT Security Services
08:30 am	Kelly	Parr	First National Bank

4.6. View Signup History of each contact

Each contacts full signup history can be viewed individually.

Current Activity		
Search Criteria All Activity		
Legend <input type="checkbox"/> = System Notes <input type="checkbox"/> = C		
S	Asm ID	Created
	WE-SIGNUP-11	07/30/02
	Seminar Seminar	
	WE-SIGNUP-10	07/30/02
	Seminar Seminar	
	WE-SIGNUP-9	07/30/02
	Seminar Seminar	
	WE-SIGNUP-7	07/08/02
	Seminar Seminar	

4.7. Print Registration Roster

This customizable report allows you to print a registration roster of one or more events.

When: 11/4/2003 (Tuesday)			
Where: Norfolk, VA			
Service	Room		
Health Screening	Front Conf		
Time	F Name	L Name	Email
08:00 am	Rebecca	Caudill	rebecca_caudill@re
08:00 am	Arthur	Matthews	arthur_matthews@re
08:00 am	Kimberly	Lembke	kimberly.lembke@re
08:00 am	Valarie	Keller	valarie_keller@reyn

4.8. View Signup History of Each Contact

This feature allows you to list all the registrations made by a contact for past and upcoming events.

Beth L Abegglen (ATC)			
Current Activity			
Search Criteria Tool: SIGNUP			
Legend <input type="checkbox"/> = System Notes <input type="checkbox"/> = Client Notes <input type="checkbox"/> = As			
S	Asm ID	Created	Assessor
	NBC-SIGNUP-2818	01/04/03	sleftwich@...
	Candidate Written Exam		
	NBC-SIGNUP-2817	01/04/03	sleftwich@...
	Candidate Simulation Exam		

4.9. Update Registration Status

This feature enables you to update the status of a registration record based on the response of the registrant at that event. Typical statuses include Paid, Show, No-show, and if an exam type event, then even the results of that exam. Batch updating allows you to change the status of selected participants quickly and easily.

Select	Results	F Name	L Name
<input type="checkbox"/>	Signed Up	Stacey	Kozisek
<input type="checkbox"/>	Signed Up	Alice	Norris
<input type="checkbox"/>	Signed Up	Howie	Halperin
<input type="checkbox"/>	Signed Up	Katie	Jennings
<input type="checkbox"/>	Signed Up	Cheri	Rentrow
<input type="checkbox"/>	Signed Up	Amy	Kistaitis
<input type="checkbox"/>	Signed Up	Theresa	Hager

4.10. Query Registration Activity

You can query the registration activity on any combination of fields through an intuitive query form.

Simply specify one or more search parameters, select the fields you want to be displayed, and choose how you want to sort your results.

For unique custom searches, you can also add on SQL-formatted criteria against any of the database fields.

Search Activity

1. Specify Search Parameters

Tool Status Pending Completed

Level from to Keywords

Created by from to

Assessed by from to

Reviewed by from to

Additional Criteria

2. Select Fields to Display

3. Select Sort Fields

4. Select Report Parameters

5. Mark Actions for Batch Update Process

6. Save this Query for Report Menu

4.11. Support for Multiple Services per Event

This feature allows you to add multiple registration options to any event.



For example, say you want to schedule a health-fair where users can signup for flu-shots and/or cholesterol screening.

Another example is when you have an exam event where candidates can register for one or more sections.

<i>Step 3 - Select a Time</i>		
Service	Room	Available Slots
Cholesterol Test	Conf Rm B & C Includes HDL Breakout/Ratio 1-2 Hr Fasting	Make a Selection *
Flu Shots	Conf Rm B & C	Make a Selection *
HbA1c (Diabetes Screen)	Conf Rm B & C Best Diabetes Test 90-Day Blood Glucose Average	Make a Selection *

4.12. Track Seat Availability and Prevent Overbooking

Based on the signup constraints defined for the event, the system automatically ensures that the number of current registrations do not exceed the maximum specified capacity. Availability tracking is shown both numerically and graphically for a quick overview of available/filled status.

Open/ Total	%Full
4/32	
7/20	

4.13. Event Listing by Sites and Enforcing Registration Deadlines

This feature allows you to list events grouped by date/location.

It also allows you to enforce registration deadlines based on your business rules. For example, in an exam event, you may want different registration timelines for new and retake candidates.

Exam Sites & Dates		
Sunday, February 8, 2004	Deadline: Friday, January 2, 2004	Register
Albuquerque, NM	Alma, MI	Athens, GA
Birmingham, AL	Boston, MA	Charleston, SC
Chester, PA	Chicago, IL	Dallas, TX
Granville, OH	Hempstead, NY	Lexington, KY
Milwaukee, WI	Omaha, NE	Orlando, FL
Overland Park, KS	Raleigh, NC	Sacramento, CA
San Diego, CA	Seattle, WA	

4.14. Automatic Email Reminders to Registrants of Upcoming Events

This powerful feature makes the system automatically send email reminders to the registrants on two specified days before the event.

Signup Parameters

Pass Code for Users to Signup

1st Reminder: 2nd Reminder:

Signup Period

Start Date: or Starts on:
(mm/dd/yyyy)

End Date: or Ends on: Relative to:
(mm/dd/yyyy)

CEU TRACKING MODULE

This module, which is specifically designed for certification and licensing organizations, allows you to track and manage the CE activity reported by your credential holders or the CE providers. CE activity is organized at multiple levels: by credential holder, by reporting period, and category.

A reporting period groups the CE activity of each credential holder with a pending or approved status while each category defines a set of specific reporting requirements.

For example, Category A could focus on CE activity through an Approved Provider program while Category B may center on Professional Development. When you select Category A, the system prompts you to choose a provider from a list of approved providers. When you select Category B, the system only ask for the name of publication or conference.

For each CE activity item, the module also allows you to record the date, description, type, and documentation relevant to that activity.

5.1. Track CE Activity

The system allows you to track CE activity by certificant, date, period, or category.

CEUs Due: 80 Status: **Delinquent**

Period: 2000-2002

Unit Summary for this Period

Category	CEUs		Action
	Awarded	To Be Reviewed	
A: Approved Provider Program (Seminar, Workshop, Conference)	25.00	0	
B: Professional Development	0.00	0	
C: College/University Course	0.00	0	
D: CPR Certification	0.00	0	
E: Individualized Options	0.00	0	

[Mark this Period as Pending](#) [Award CEUs](#)

5.2. Add CE Activity

Each CE activity includes date, description, activity type, documentation type, CEU's requested, and CEU's approved.

Add New Activity

1. **Date of Activity*** **Type of Activity***

Name of Course or Activity*

NATABOC Approved Provider Number and Name*

Document Type* **CEUs*** **Awarded:** **CEUs:**

5.3. Track Completion Status of Reporting Period For Each Certificant

This feature allows you to track if a credential-holder's has met his/her CE requirements for a specified reporting period.

Period History				
	Period	Assessment ID	Status	Action
ⓘ	2003-2005	NB-CEU-6032	Pending	
✓	2000-2002	NB-CEU-515	Completed	Select

5.4. Generate List of Certificants with Incomplete CEU's

This feature allows you to pull up a list of credential holders who have not completed their CE requirements for a specified reporting period.

Cert Num	Assesment ID	Updated	F Name	L Name	
069302606	NB-CEU-1412	7/26/2002			Review
089702458	NB-CEU-1472	7/29/2002			Review
110002071	NB-CEU-2130	8/23/2002			Review
029168099	NB-CEU-3049	10/28/2002			Review
110002071	NB-CEU-2130	1/10/2003			Review
079502575	NB-CEU-5492	1/22/2003			Review
029402455	NB-CEU-5803	1/29/2003			Review
119402444	NB-CEU-5804	1/29/2003			Review
049202437	NB-CEU-5881	1/30/2003			Review
089902661	NB-CEU-5958	2/3/2003			Review

5.5. Integration with Approved Providers List

This feature saves you time by having the Approved Provider list integrated into the CEU module for quick and easy data entry, as well as verification that the provider is approved.

Add New Activity

1. **Date of Activity*** **Type of Activity***

Name of Course or Activity*

NATABOC Approved Provider Number and Name*

- A1000: Los Alamos Medical Center
- A1002: Jim Davis Connection, L.L.C. (The)
- A1006: American Physical Therapy Association (APTA) - Nevada
- A1021: University of Minnesota & American Academy of Sports Dentis
- A1034: University of Minnesota & American Academy of Sports Dentis
- A1043: American Physical Therapy Association (APTA) - New Jersey

5.6. CEU Review and Approval Workflow

This option sets up a workflow where the CE administrator can review the submitted CE activity and award appropriate CEU's.

CATEGORY A Approved Provider Program							
Reported Activity							
Date of Activity	CEUs			Sys	Type of Activity	Name of Course or Activity	IATABOC Approved Provider Number and Name
	Req	Appr	Update				
12/3/2002	5	5	<input type="checkbox"/> CEUs: <input type="text"/>		Conference	test	A1000: Los Alamos Medical Center
12/4/2002	5	5	<input type="checkbox"/> CEUs: <input type="text"/>		Conference	test2	A1000: Los Alamos Medical Center
12/4/2002	10	10	<input type="checkbox"/> CEUs: <input type="text"/>		Conference	test3	A1051: Excel Sports Medicine
12/4/2002	5	5	<input type="checkbox"/> CEUs: <input type="text"/>		Conference	test	A1000: Los Alamos Medical Center

5.7. Support for Reporting based on Anniversary Date

This option allows the system to automatically determine the reporting period based on the credential holder's anniversary date. By default, the system assumes that the same reporting period for every credential holder.