Release Highlights 2.3.01

Rapattoni *Magic*-Cloud AMS 2.3.01 is here! This exciting new version gives your association access to the enhancements listed below as well as a number of maintenance updates.

The following enhancements have been implemented in version 2.3.01:

- IMS User Interface Enhancements & Updates
    - Updated Logon Page
    - Redesigned Home Page
        - Updated Navigation Menu
        - Member Information Display
        - Calendar Summary Display
        - New Message Center
        - New ShowingTime Statistics Widgets
- New Education/Events Consolidated Calendar
- Configurable Payment Plans & Multiple Invoice Types Now Supported for IMS Auto-Pay
- New 'Acct Type' & 'Routing #' Fields Available for Member Payment Method Info Form
- Invoice Type Code Added to Cash Receipts Posting Form
- Merchant Description & New Merchant Rules Now Available
- New Columns & Label Added to Receipt Applied Detail Form
- 'Member Status' Column Added to Credit Card Expiration Form
- Dues History Form Updates
- Form Name Update: "Member Payment Method Info" Form Now Available
- New 'View Certificate' Button Added to Course Certification Information Form

IMS User Interface Enhancements & Updates

The Internet Member Services (IMS) user interface has been updated with new enhancements and options, including the following:

- **Updated Logon Page** – The logon page has been updated to provide a modern look with a customizable scrolling banner displaying behind the logon dialog box. Please note that the recommended size for banner images is 900 x 325 pixels for optimum viewing but association staff may adjust the image size according to their preference. However, you should make sure all images are the same size when adding multiple images to the banner.
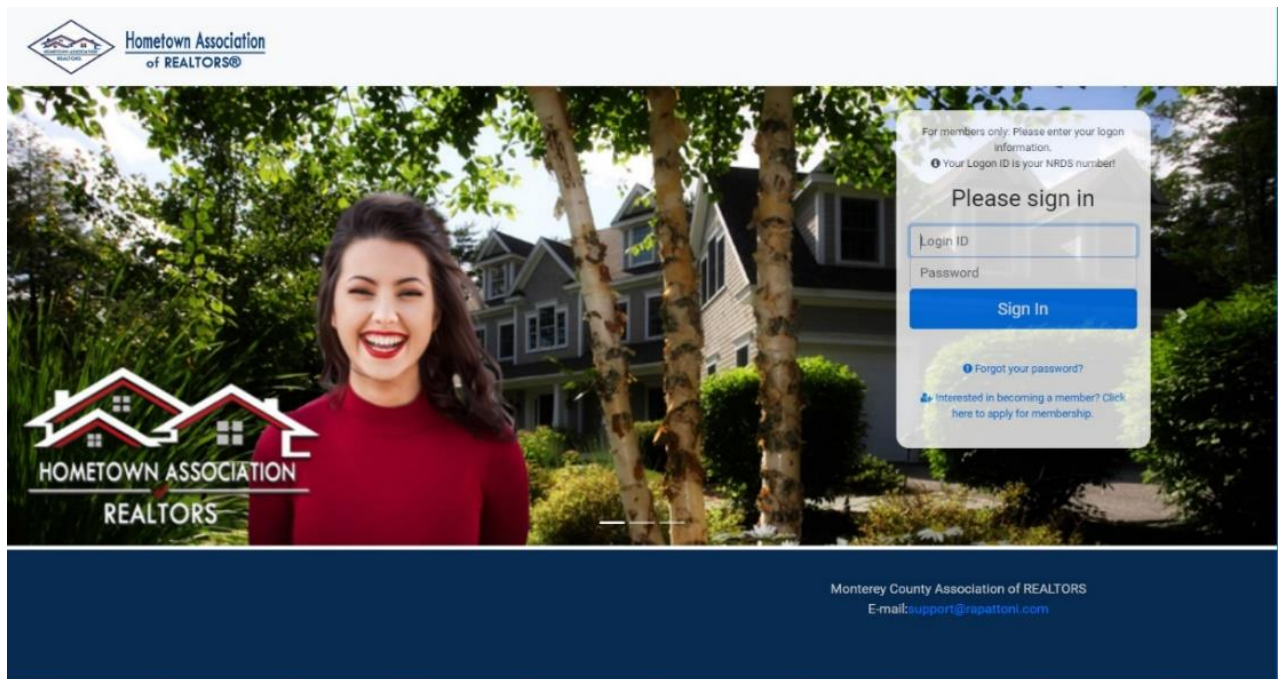
- **Redesigned Home Page** – The entire Home page has been redesigned to provide a cleaner interface and deliver more clear and concise information specific to the association member.

- o **Updated Navigation Menu** – The navigation menu has been moved to the left side of the Home page and now displays on every page for faster navigation.

o **Member Information Display** – Basic information for the association member is displayed along with the profile picture at the top of the Home page. This includes a "Balance Due" information window that displays the member's outstanding balance per invoice type.
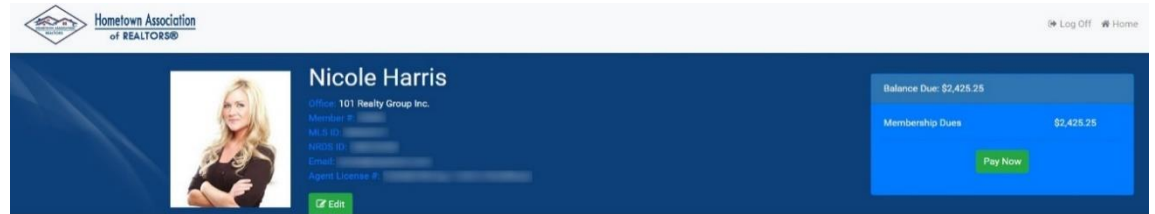
o **Calendar Summary Display** – A new calendar summary displays on the IMS Home page allowing association members to quickly view important details and register for upcoming classes and events. The calendar is color coded, making it easy to view the classes and events that are available, closed, or have already been registered by the association member and a "Filter Events/Classes" option allows members to search on any field to filter the results. As part of this enhancement, classes and events can also be added to a members' personal Apple®, Google®, and Outlook® calendars.
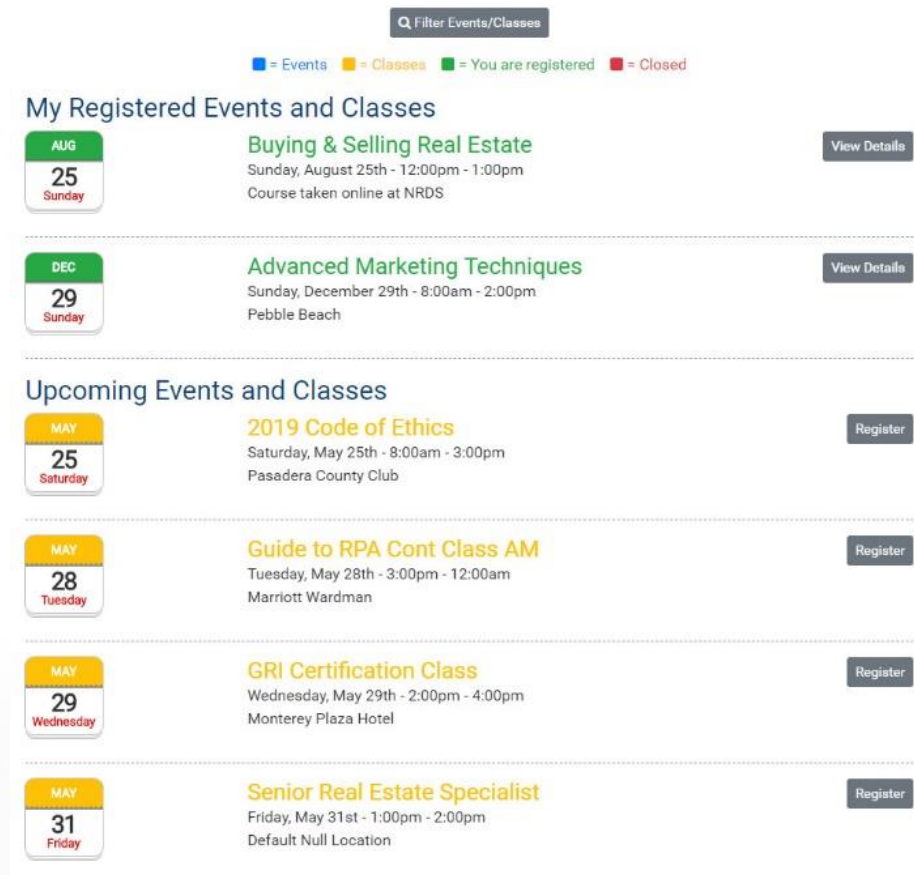
○ **New Message Center** – A message center has been added to the right side of the Home page, allowing association members to stay up-to-date on any important communications from staff. Messages can be posted for all users or posted to specific individuals. This includes a birthday message that will automatically display for the member for a week prior and after their birthday.

Staff can create system wide messages from the **IMS Home Page Notes Form** or create messages for individuals using the **Notes** tab in the member records.

o **New ShowingTime Statistics Widgets** – Widgets have been added underneath the message center, displaying closed sales and listings statistics for the association member. Please note that the statistics widgets are only available for ShowingTime MarketStats customers.

New Education/Events Consolidated Calendar

A new **Education/Event Calendar (EDEV)** option is now available in the **Internet Member Services Information Form** that contains both classes and events in one convenient calendar.
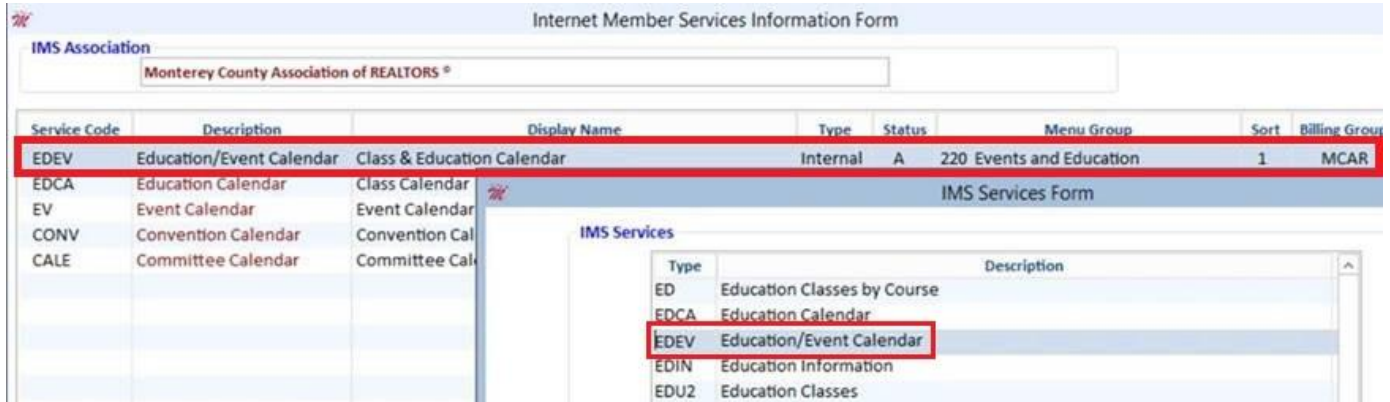
The new calendar is viewable in the standard calendar or list view based on preference and is color coded, making it easy to view the classes and events that are available, closed, or have already been registered by the association member. The list view also allows members to search on any field to filter the results.

Please note that the separate Education and Events calendars are still available.
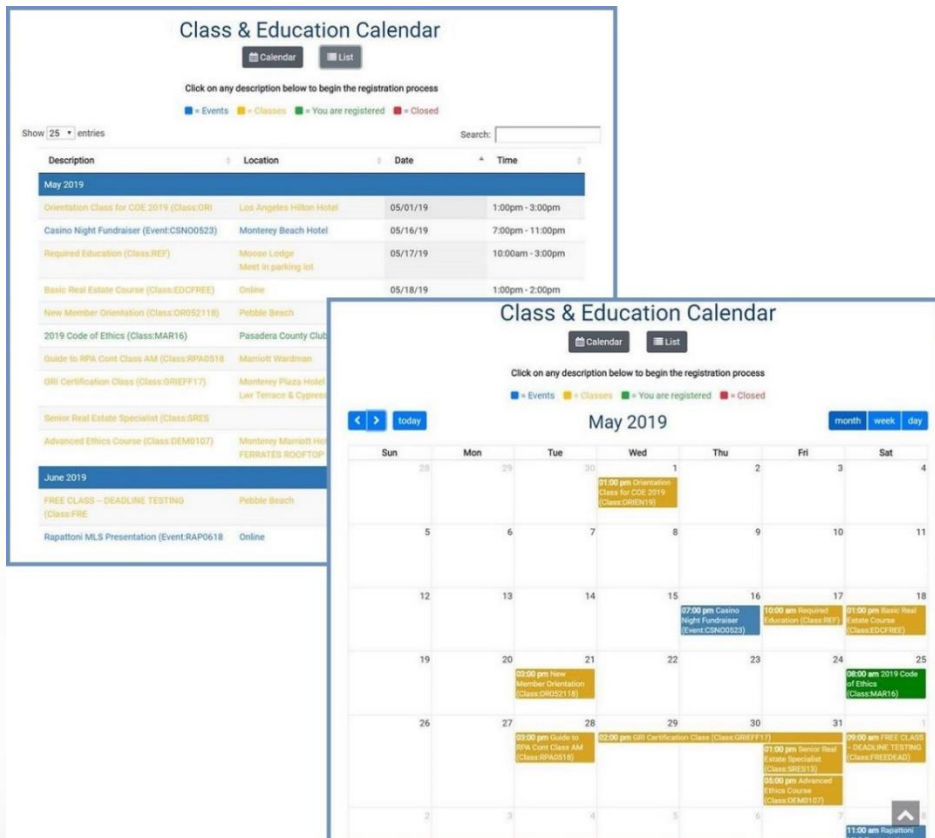
Configurable Payment Plans & Multiple Invoice Types Now Supported for IMS Auto-Pay

The new Configurable Payment Plan options allow staff to offer convenient installment payments as an alternative to paying all at once. Staff can choose between multiple payment plan options (2 to 12 installments) for association members to select when choosing their auto-pay preferences and can charge an optional one-time processing fee if desired.

A "Y" (Yes) displays for all **Default Invoice Types** that have been selected for auto-pay in a new **IMS Column** on the **Invoice Type Table**. New **IMS Options** display for the corresponding invoice types, allowing staff to customize the **Payment Plan Installments - Sort Sequences** for each one.

As part of this enhancement, the **IMS Preference Setup Form** now supports multiple **Default Invoice Types** for staff to select when setting up auto-pay options for association members.

New 'Acct Type' & 'Routing #' Fields Available for Member Payment Method Info Form

The **Credit Cards** tab on the **Member Information Form** has been updated to include the **Acct Type** and **Routing #** columns.

#		Card Type	Credit Card / Acct #	CID	Expires	Auto Pay	Acct Type	Routing #	Inv. Type	Sort Seq.	Status	Entered By	
1	V	Visa	************1111		01/21	☐			D	X	A	dClem	11/02/18
2	B	Bank Account	*****5000				C	123456780			A	KKoegle	05/14/19
3	A	American Express	***********0005		12/24	☐					A	pdelta	05/28/19

The corresponding values can be modified from the **Member Payment Method Info Form**.

Member Payment Method Info

Member

Payment Info

Status	⦿ Active	○ Pending	○ Inactive

Card Type   B   Bank Account

Bank Account #

Expires   01/01

CID

Bank Routing #   123456780   ⦿ Checking   ○ Saving

Credit Card Billing Address

Name on Card

Address

City, State, Zip

Billing

☐ Allow Auto Payment

Invoice Types

Sort Sequences

Member's IMS Selection

☐ Default Card

[Save]   [Delete]   [Cancel]

Invoice Type Code Added to Cash Receipts Posting Form

The **Cash Receipts Posting Form** has been updated to display the invoice type code with the description in the **Invoice Type** column.

As part of this enhancement, the **Receipt #** field on the **Transaction Successful** confirmation pop-up can be zoomed by pressing *F5*, allowing staff to quickly view the receipt in the **Receipt History Form**.

Merchant Description & New Merchant Rules Now Available

The **Batch Information** section of the **Batch Form** has been updated and now displays a description of the merchant next to the **Merchant Number** field. Please note that if staff leave the **Merchant Number** field with a default "0" value, the **CC Verifying Option** will also be defaulted to **None**.

New Columns & Label Added to Receipt Applied Detail Form

The **Receipt Applied Detail Form** has been updated to include the **Invoice Type**, **Invoice Status**, and **Dues Split** columns. The receipt number has also been added to display toward the top of the form, indicating which receipt was applied to the corresponding invoices.

'Member Status' Column Added to Credit Card Expiration Form

The **Credit Card Expiration Form** has been updated to include the **Member Status** column for the member's primary association, allowing staff to filter records using this field.

Last Name	First Name	Member #	Member Status	Payment Type		Credit Card #	Exp Date	Invoice Type	Sort Sequence	Auto Pay	Entered By
	Nancy		T	V	Visa	1	01/01			☑	pdelta
	Jose		S	A	American Express	**********0005	01/01			☑	pdelta
	Nancy		T	V	Visa	1	01/01			☑	pdelta
	Blanca		S	V	Visa	***********1111	01/06			☐	IMS
	Rose		T	V	Visa	***********1111	02/06			☑	IMS
	S. Lynda		S	V	Visa	***********1111	03/06			☐	IMS
	David		T	V	Visa	***********1111	03/06			☐	IMS
	Susan		T	V	Visa	***********1111	03/06			☐	IMS
	Leticia		S	V	Visa	***********1111	03/06			☐	IMS
	Felisa		T	V	Visa	***********1111	03/06			☐	IMS
	Staci		S	M	Master Card	***********4444	04/06			☐	IMS
	Jerry		T	V	Visa	***********1111	04/06			☐	IMS
	Julia		S	V	Visa	***********1111	05/06			☐	IMS
	Robert		T	V	Visa	***********1111	05/06			☐	IMS
	Susan		S	V	Visa	***********1111	06/06			☐	IMS
	Kevin		T	V	Visa	***********1111	06/06			☐	IMS
	Marcia		S	M	Master Card	***********4444	06/06			☐	IMS
	Sam		S	V	Visa	***********1111	06/06			☐	IMS
	Miki		S	M	Master Card	***********4444	07/06			☐	IMS
	James		I	M	Master Card	***********4444	07/06			☐	IMS
	Sharon		S	V	Visa	***********1111	08/06			☐	IMS
	Shirley		T	M	Master Card	***********4444	08/06			☐	IMS
	Douglas		S	V	Visa	***********1111	08/06			☐	IMS
	Mary		S	V	Visa	***********1111	08/06			☐	IMS
	Crispin		S	V	Visa	***********1111	08/06			☐	IMS
	Susan		S	V	Visa	***********1111	08/06			☐	IMS
	Doug		I	M	Master Card	***********4444	08/06			☐	IMS
	Irene		I	V	Visa	***********1111	08/06			☐	IMS
	Francesca		S	V	Visa	***********1111	09/06			☐	IMS
	Patricia		S	V	Visa	***********1111	09/06			☐	IMS

Credit Card Expiration Form — Search Members ⊗ (4,194) — Search Offices ⊗ (1,217) — Search Menu ⊗

Dues History Form Updates

The **Dues History Form** has been updated with a new **Payment Ref.** column for range criteria.

| Dues History Form by Code | | | Search Members ❌ (4,194) | | Search Offices ❌ (1,217) | | Search Menu ❌ | | | |

Charge Code	Description	Set #	Category	Description	Billing Year	Count	Total Amount
RPNC	Red pencils	1	1	stationary	2018	0	0.00
05AFI	2005-2006 Affiliate Initial.	9	10	Annual Membership Dues	2005	27	6,325.00
05AFN	2005-2006 Affiliate Dues - New	9	10	Annual Membership Dues	2005	29	3,689.04
05AFR	2005-2006 Affiliate Renewal	9	10	Annual Membership Dues	2005	1	275.00
05AOR	2005-2006 AFF Addl Ofc Renewal	9	10	Annual Membership Dues	2005	5	500.00
05CDI	2005 CAR DUES - Initial Fee	9	10	Annual Membership Dues	2005	178	4,860.00
05CDN	2005 CAR Dues - New Member	9	10	Annual Membership Dues	2005	178	5,996.25

Member #	Name	NRDS ID	Billing Group	Status	Invoice #	Receipt #	Receipt Date	Dues Split	Batch ID	Amount	Payment Type	Card/Check #	Payment Ref.
7399	Courtney Powell		MCAR	T	5000398	320	09/02/05		50902R	275.00	O	13392	
7464	Donna Bomarito		MCAR	A	5002607	1735	11/21/05		51121R	275.00	O	049327	
20180	Joseph Sanchez	180016861	MCAR	T	5000898	527	09/20/05		50920R	275.00	O	6447	
20222	Benjamin Post		MCAR	T	5001189	752	10/03/05		51003R	275.00	P	6300	
20273	Melissa Radowicz	180016954	MCAR	T	5001921	1196	10/19/05		51019R	275.00	O	6474955	
20318	Terri L. Bruno	180016999	MCAR	T	5001993	1251	10/24/05	Y	51024R	275.00	V	************4019	2418605
20340	Steven Bergman		MCAR	T	5002193	1443	11/02/05		51102R	275.00	V	************6499	2461131
20359	Aubrey Tillinghast		MCAR	T	5002455	1633	11/15/05		51115R	275.00	O	41716	
20463	Thomas Schellenbe	180017179	MCAR	T	5004692	3144	01/04/06		60104R	275.00	O	7231	
20469	Sally May	180017187	MCAR	T	5005075	3450	01/06/06		60106R	275.00	P	1053	
20543	Ted Lane		MCAR	T	5005964	4268	01/26/06		60126R	275.00	P	1909	
20577	Sarah Malone		MCAR	T	5006349	4621	02/06/06		60206R	275.00	V	************0564	3013069
20638	Tom Brick		MCAR	A	5006793	4935	03/01/06		60301R	275.00	P	1181	
20660	Kathleen Emerson		MCAR	T	5006962	5065	03/09/06		60309R	275.00	P	1211	
20678	Tony Bell		MCAR	T	5007069	5165	03/16/06		60316R	275.00	O	484.62	
20704	Dave Hamerslough		MCAR	A	5007420	5408	04/04/06		60404R	275.00	O	30722	
20714	Manuel Maes		MCAR	T	5007436	5412	04/05/06		60405R	275.00	M	************8659	3268481
20738	Pat Whittaker		MCAR	T	5007657	5574	04/12/06		60412R	275.00	O	191	
20762	Kim Cabutage		MCAR	T	5007995	5843	04/24/06		60424R	275.00	O	002723	
20791	Amy Nester-Arana		MCAR	A	5008242	6032	05/09/06	Y	60509R	275.00	V	************7711	3391639
20797	Lorisa M. McKlevey		MCAR	A	5008303	6088	05/11/06		60511R	275.00	O	1210	
20835	Victor Burela		MCAR	T	5008947	6687	06/01/06		60601R	275.00	V	************6453	3480216

Form Name Update: "Member Credit Card Info" Form Changed to "Member Payment Method Info"

The **Member Credit Card Info** form has been relabeled as the **Member Payment Method Info** form to better reflect the type of information that it contains.

New 'View Certificate' Button Added to Course Certification Information Form

The **Course Certification Information Form** has been updated with a new **View Certificate** button for staff to view the existing document. Staff can upload a new certificate or replace an existing one by pressing *F5* to open a File Explorer window.

Rapattoni *Magic*-Cloud AMS Maintenance Report
2.3.01

This report is designed to inform Cloud AMS key contacts of software maintenance items. Please note that this report may not be a complete list and that items affecting only one Cloud AMS customer may not be included in this report.

The following maintenance items have been implemented in version 2.3.01.

Accounting

Previously, some of the informational text was missing from the Archive Receipts and Invoices Utility. This has been fixed and informational text displays on the Archive Receipts and Invoices Utility properly. (RNI 180703-000107)

Some users were receiving a misspelled error message for an invalid font when attempting to create and save a new invoice type. This has been resolved and a default font will be set automatically when a new invoice type is created. (RNI 180913-000043)

Only users with the "Credit Card Maintenance" access right were able to view the Credit Card tab in member records. This has been fixed and all users are now able to view the last four digits of a member's credit card number in the Credit Card tab regardless of access rights. Please note that only users with the "Credit Card Maintenance" access right are able to create and modify credit card information. (RNI 181213-000072)

The "Sort Order" fields on the Credit Card Payment Processing form, Credit Card Expiration Merge Form, and Credit Cards Accounts Report form have been changed to "Card Sort Sequence" to better reflect the information displayed. (RNI 181214-000075 & 190425-000131)

Education

The word "category" was previously missing from the end of the description on Step 5 of the Getting Started – Education Tracking form. This has been fixed and the description for each step displays properly when setting up education tracking. (RNI 181008-000045)

Events

Previously, clicking the "Create" button or pressing *Ctrl+E* would not open a new Event Information Form from the Event Registration Form. This has been fixed and users are now able to create a new event from this workflow as intended. (RNI 181008-000045)