



Release Highlights 2.4

Rapattoni *Magic*-Cloud AMS 2.4 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 2.4:

- Multiple Tax Rates per Invoice\Charge Code
- New Design for Cloud AMS Master Calendar
- Partial Payments Now Available for IMS Payment Plans
- NAR Join Date Added to Member Information Form
- Additional Mailing Address and “Preferred” Label Added to Member Information Form
- New “Occupation” Field Added to Member Information Form
- Additional Fields Now Available on Credit Card Expiration Form
- Billing Preference Now Defaults to “Email” for New Members
- Alert Messages Now Display in Bottom-left Corner of Member Query Form

Multiple Tax Rates per Invoice\Charge Code

The **Charge Code Information Form** has been updated to include an additional tax rate.

Sales tax was previously calculated based on a single tax rate that was either set up in the batch or in the **Tax Rate** field on the **Office Information Form** (based on the office the agent belongs to). The additional tax rate in the charge code table is now available for associations with items that require multiple tax rates per item or different tax rates per item. This allows associations to create invoices and billings reflecting these multiple rates.

The **Sales Tax Reports** and **Month End Reports** have been updated to leverage the additional tax rate as well.

The screenshot shows the 'Charge Code Information Form' window. It contains several sections:

- Charge Code Information:** Charge Code (MLS), Description (MLS Monthly Fees), Set # (1), Category (10 Membership Dues), Amount (60.000), G/L Credit Account (1234), G/L A/R Account, Special Billing Code (0), Billing Year (2020), Invoice Print Options (1), Billing Installment # (0), Status (A).
- Sales Pricing Detail:** Non-Member Sales Price (60.000), IMS Member Sales Price (60.000), IMS Non-Member Sales Price (60.000).
- Options:** Accumulate Contribution History (Contribution Category:), Split Contributions, Taxable (Tax rate 1: 1, Tax rate 2: 2), Update Billed Status/Dues Paid Date, Memo Charge.

Buttons at the bottom: Update Recurring Charges Price, Prorate Table, Copy Charge Code.

The following example shows a manually created sales invoice with the tax rates broken down in detail:

Anytown Realtors® Association
 1020 Hampshire Road
 Westlake Village CA 91301

Nicole D. Alaoui
 Midtown Realty
 1528 Via Colinas
 Westlake Village CA 91301

Invoice Date 06/05/20
 Invoice # 5010042
 Member # 48019
 Office # 99999

Item Qty	Code	Description	Unit Price	Extended Amount	Taxable
1	2020C	2020 State Dues	300.000	300.00	2 3
1	2020L	2020 Local Dues	150.000	150.00	2 3
1	2020P	2020 National Dues	250.000	250.00	2 3
Sub Total				700.00	
Tax 3				5.000%	35.00
Tax 2				6.000%	42.00
Total				777.00	

Make all checks payable to Anytown Realtors® Association

This sample balance forward statement also shows the tax rates broken down in detail:

Anytown Realtors® Association
 1020 Hampshire Road
 Westlake Village CA 91301

BALANCE FORWARD STATEMENT

Nicole D. Alaoui
 Midtown Realty
 1528 Via Colinas
 Westlake Village CA 91301

Statement Date 06/05/20
 Member # 48019
 Office # 99999
 Activity Thru Date 06/05/20
 Due Date 06/30/20
 Balance Due 777.00

Please detach and return the upper portion with your payment.

Description	Qty	Unit Price	Extended Amount	Taxable
Invoice 5010042 06/05/20				
2020 State Dues				
48019 Alaoui, Nicole D	1	300.000	300.00	2 3
2020 Local Dues				
48019 Alaoui, Nicole D	1	150.000	150.00	2 3
2020 National Dues				
48019 Alaoui, Nicole D	1	250.000	250.00	2 3
Invoice Subtotal			700.00	
Tax 3		5.000%	42.00	
Tax 2		6.000%	42.00	
Invoice Total			784.00	
Detailed Charges Total			784.00	
Statement Date 06/05/20	Activity Thru Date 06/05/20	TOTAL DUE	784.00	
		Total Tax 3	5.000%	42.00
		Total Tax 2	6.000%	42.00

New Design for Cloud AMS Master Calendar

The **Master Calendar** within Cloud AMS has been redesigned to provide a cleaner interface while delivering more clear and concise information. You can customize the calendar's color coding by selecting the drop-down arrow next to the items listed in the red box shown below.

The screenshot displays the 'Master Calendar Form' interface. At the top, there are search filters for 'Search Members' (8,656), 'Search Offices' (1,126), and 'Search Menu'. The main calendar grid shows dates from Sunday, April 12, to Saturday, May 16, 2020. A sidebar on the right, titled 'Meeting Colors', contains three dropdown menus for 'Events', 'Classes', and 'Committees', which are highlighted with a red box. Below these dropdowns are three monthly calendar views for April, May, and June 2020, each with a grid of days and a 'Today' indicator.

Partial Payments Now Available for IMS Payment Plans

Partial payments are now available when agents make payments in IMS after they've made an initial payment with a designated payment plan.

Previously, if an agent selected a payment plan and then logged onto IMS at a later date to make a payment, the only option available was to pay the full remaining balance. With this update, agents can make partial payments even if they don't wish to pay the full balance. Your association can also set a minimum payment percentage per invoice type, ensuring that all partial payments must equal or exceed the specified minimum payment.

As part of this update, partial payments are also allowed if a credit has been applied to the invoice.

Please contact Rapattoni *Magic-Cloud* AMS support at 1-866-730-7115 or support@rapattoni.com for assistance setting up this new feature.

Main Log Off Home

Review Payment Info for Nicole D. Alaoui

You selected the following invoices to pay. Click the appropriate payment button, or click Cancel to change your selections.

Invoice	Date	Office	Balance Due	Payment Plan	Amount to Pay
5010042	06/05/20	Midtown Realty	727.00	<div style="border: 1px solid black; padding: 2px;">Pay Balance Partial payment (Min: \$144.25)</div>	<input type="text" value="144.25"/>

Total Selected: 144.25

Credit Card Cancel

NAR Join Date Added to Member Information Form

The **NAR Join Date** field was added in response to an issue where the **Association Joined Date** was inadvertently updating the **NAR Joined Date** stored at NAR. This new **NAR Join Date** field is now the value communicated to NAR for new members.

Note that the **NRDS Insert Date** is not sent to NAR, it is set automatically by NAR as a timestamp when inserting a new member record, and it may show a value of 00/00/00 for local associations that do not pull data into their database from NAR. The **NAR Join Date** field in Cloud AMS will be updated for new member records when pulling data from NAR is enabled.

Member Information Form ✖

Actions

Save Quit Cancel Office Query Preferences

A/R Recur. Charges Non Recur. Dues History

Change Log Field Header Field Detail Transfer

Class History Req. Tracking Event

History Awards Committee Lists Call Tracking Other

CDB Help

Member # 48019 Nicole Alaoui	Occupation R REALTOR Transfer Date 06/16/20	 Modify Picture
Office # 99999 Midtown Realty	License Type	
Title	License #	
First Name Nicole	Expiration 00/00/00	
Last Name Alaoui	NRDS ID 180099497 NAR Join date 06/05/20 NRDS Insert 00/00/00	
MI	MLS ID 48019	
Full Name Nicole Alaoui	IMS Login 48019 Password welcome	
Nickname Nicole	Alternate ID	
Salutation	Voting Precinct N	
Birth Date 00/00/00	Stop Mail No	
Gender	Preferred Billing Method Email	Billing Cycle
	Preferred Mailing Address Office	Balance Due 0.00

Home Address	Mailing Address	Office Address (Preferred)
Attn/Care of	<input checked="" type="checkbox"/> Same	
Street Address 1000 Imperial Place	as Home 1000 Imperial Place	1528 Via Colinas
City, State, ZIP Westlake Village CA 91301	Westlake Village CA 91301	Westlake Village CA 91301

Internet	Phones
Association email nalaoui@rapattoni.com	Office (417) 555-5555 Extension 0
Billing email	Home
NAR email nalaoui@rapattoni.com	Personal Fax
MLS email nalaoui@rapattoni.com	Preferred Phones
Web Address	

Associations														
Notes	Documents	Additional Phones	Social Media	Additional Licenses	Designations	State Affiliation	Alert	Credit Cards						
Association ID	Primary Indicator	Status	Status Date	Billing Type	Member Type	Joined Date	Orientation Date	Dues Waived Local	Dues Waived State	Dues Waived National	Online Status	Billed Status		
MCAR	P	A	06/05/20	R	R	06/05/20	00/00/00	N	N	N	A	N		
MLS	X	A	06/05/20	R	R	06/05/20	00/00/00	N	N	N	N	N		

Additional Mailing Address and “Preferred” Label Added to Member Information Form

A new **Mailing Address** field has been added to the **Member Information Form** to accommodate agents with mailing addresses that differ from their **Home Address** and **Office Address** (such as a P.O. Box).

For your convenience, a **Same as Home** check box is available to automatically populate the **Mailing Address** with the agent’s **Home Address** information. This option will initially be checked by default for all existing member records when the new feature is released and you can then update the **Mailing Address** for individual agents as needed.

In addition, a **(Preferred)** label now displays next to the address the agent has selected as their preferred address.

The screenshot shows the Member Information Form for Nicole Alaoui. The form is divided into several sections: Personal Information, Home Address, Mailing Address, Office Address, Internet, and Associations. The Mailing Address section is highlighted with a red box, showing the 'Same as Home' checkbox checked. The Office Address is marked as 'Preferred'.

Association ID	Primary Indicator	Status	Status Date	Billing Type	Member Type	Joined Date	Orientation Date	Dues Waived Local	Dues Waived State	Dues Waived National	Online Status	Billed Status
MCAR	P	A	06/05/20	R	R	06/05/20	00/00/00	N	N	N	A	N
MLS	X	A	06/05/20	R	R	06/05/20	00/00/00	N	N	N	N	N

New "Occupation" Field Added to Member Information Form

A new **Occupation** field is now available on the **Member Information Form**. This new field will be sent to NAR and may be updated within Cloud AMS. You can select an occupation from the default list or add and remove options to meet your association's needs.

Member Information Form

Actions: Save, Quit, Cancel, Office Query, Preferences, A/R, Recur. Charges, Non Recur., Dues History, Change Log, Field Header, Field Detail, Transfer, Class History, Req. Tracking, Event, History, Awards, Committee, Lists, CDB, Help, Call Tracking, Other, NRDS, Help.

Member #: 48019 **Nicole Alaoui**

Office #: 99999 **Midtown Realty**

Occupation: R REALTOR **Transfer Date:** 06/16/20

License #: _____ **Expiration:** 00/00/00

License Type: _____

NRDS ID: 180099497

MLS ID: 48019

IMS Login: 48019

Alternate ID: _____

Voting Precinct: N

Stop Mail: No

Preferred Billing Method: _____

Preferred Mailing Address: _____

Home Address: 1000 Imperial Place, Westlake Village, CA 91301

Mailing Address: Same as Home Address: 1000 Imperial Place, Westlake Village

Internet: Association email: nalaoui@rapattoni.com, Billing email: _____, NAR email: nalaoui@rapattoni.com, MLS email: nalaoui@rapattoni.com, Web Address: _____

Occupation Name Dialog:

Code	Description
AP	Appraiser
BMO	Broker MLS Only
BOR	Broker of Record - N
DR	Designated REALTOR
EV	Event non-member
INS	Home Owner Insurance
L	LFRO
LPR	Loan, Property Mgt,
MLO	Mortgage loans
N	Null
NR	Non Realtor
O	Other
OP	Office Personnel Rea
R	REALTOR

Associations:

Association ID	Primary Indicator	Status	Status Date	Billing Type	Member Type	Joined Date	Orientation Date	Dues Waived Local	Dues Waived State	Dues Waived National	Online Status	Billed Status
MCAR	P	A	06/05/20	R	R	06/05/20	00/00/00	N	N	N	A	N
MLS	X	A	06/05/20	R	R	06/05/20	00/00/00	N	N	N	N	N

Additional Fields Now Available on Credit Card Expiration Form

In response to customer requests, the following fields are now included on the **Credit Card Expiration Form**:

- **Primary Assoc. Status** – shows the agent’s primary **Association ID** and their **Status** within the association
- **Billing Cycle** – allows associations to generate statements in separate batches based on billing cycle for agents who opt into Auto Pay in IMS
- **Date Entered** – shows the date that the credit card was entered in Cloud AMS or IMS

Last Name	First Name	Member #	Primary Assoc. Status	Payment Type	Credit Card #	Exp Date	Invoice Type	Sort Sequence	Auto Pay	Billing Cycle	Entered By	
Alaoui	Nicole	48019	SRA A	V Visa		01/25	D	A	<input checked="" type="checkbox"/>	0	nharris	06/05/20

Billing Preference Now Defaults to “Email” for New Members

The **Billing Preference** for new members previously defaulted to the **Mail** option. Prior to the new record being saved, a pop-up box would display asking if you wished to update the billing preference to **Email**. This functionality has been updated so that the **Billing Preference** now defaults to the **Email** option. The pop-up message has been removed but you can still change the field to the **Mail** option for agents who prefer paper bills.

Note that **Billing Preference** was not modified for any existing agents, the new **Email** default only applies when new members are entered in Cloud AMS.

Alert Messages Now Display in Bottom-left Corner of Member Query Form

The bottom-left corner of the **Member Query Form** now displays any Member or Accounting Alerts that are stored for the selected agent.

Utilities

Full Name **Nicole D. Alaoui** **THIS IS A TEST!**

Nickname Nicole Birth Date 01/07/71

License # Undefined Exp.

Occupation IMS Login 48019

Alternate ID

Email nalaoui@rapattoni.com

Web

Preferred Phones Office 306-999-9999

Preferences Bill Method Email Office No Stop Mail

Associations	Notes	Documents	Additional Phones	Social Media	Additional Licenses	Designation
Assoc. ID			Prim Ind.		Status	
SRA			P		A	
MLS			X		A	

Membership

Accounting

Education

Events

Committee

THIS IS A TEST!

Rapattoni *Magic*-Cloud AMS Maintenance Report

2.4

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 2.4.

Membership

New Member Export Form fields – The following new fields have been added to the **Member Export Form**:

- **Preferred Media**
- **Billing Preference**
- **Billing Cycle**
- **NAR Join Date** (also added to **Office Export Form**)
- **Occupation Code/Name**
- **Mailing Address**

NRDS ID no longer requires special keystroke to open – You no longer have to press CTRL + O to open the **NRDS ID** field on the **Member Information Form** and **Office Information Form**.

Increased the Alternate ID field in the member record from 50 to 100 characters – For associations that utilize the **Alternate ID** field, its maximum length has been increased from 50 to 100 characters.

Accounting

Updated the Billing Import-Data Exceptions report to convert to PDF – The **Billing Import-Data Exceptions** report was previously outputting directly to the printer. It now displays as a PDF that can be printed if necessary.

Internet Member Service (IMS)

New IMS option allows photo uploads while preventing Biography entry – Associations can now allow photo uploads in IMS without exposing the **Biography** section for entry.

Option to hide License Expiration in IMS Personal Information – Associations now have the option to hide the **License Expiration** field so that it won't display in IMS.

