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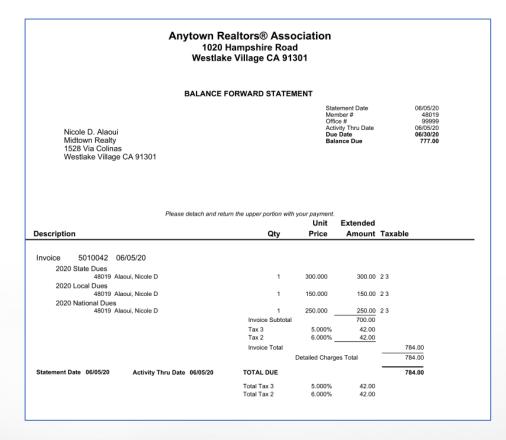
The **Sales Tax Reports** and **Month End Reports** have been updated to leverage the additional tax rate as well.

The 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	Invoice Date	06/05/20
Midtown Realty	Invoice #	5010042
1528 Via Colinas	Member #	48019
Westlake Village CA 91301	Office #	99999

Qty	Item 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

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

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

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.

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.

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.

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.

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.

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	☑	0	nharris	06/05/20

Credit Card Expiration Form — Search Members ✕ (8,656)   Search Offices ✕ (1,126)   Search Menu ✕

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.

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.