Rapattoni *Magic*-Cloud AMS Release Highlights

1.3.05

Rapattoni *Magic*-Cloud AMS 1.3.05 is here! This exciting new version gives your association access to the enhancements listed below as well a number of maintenance updates.

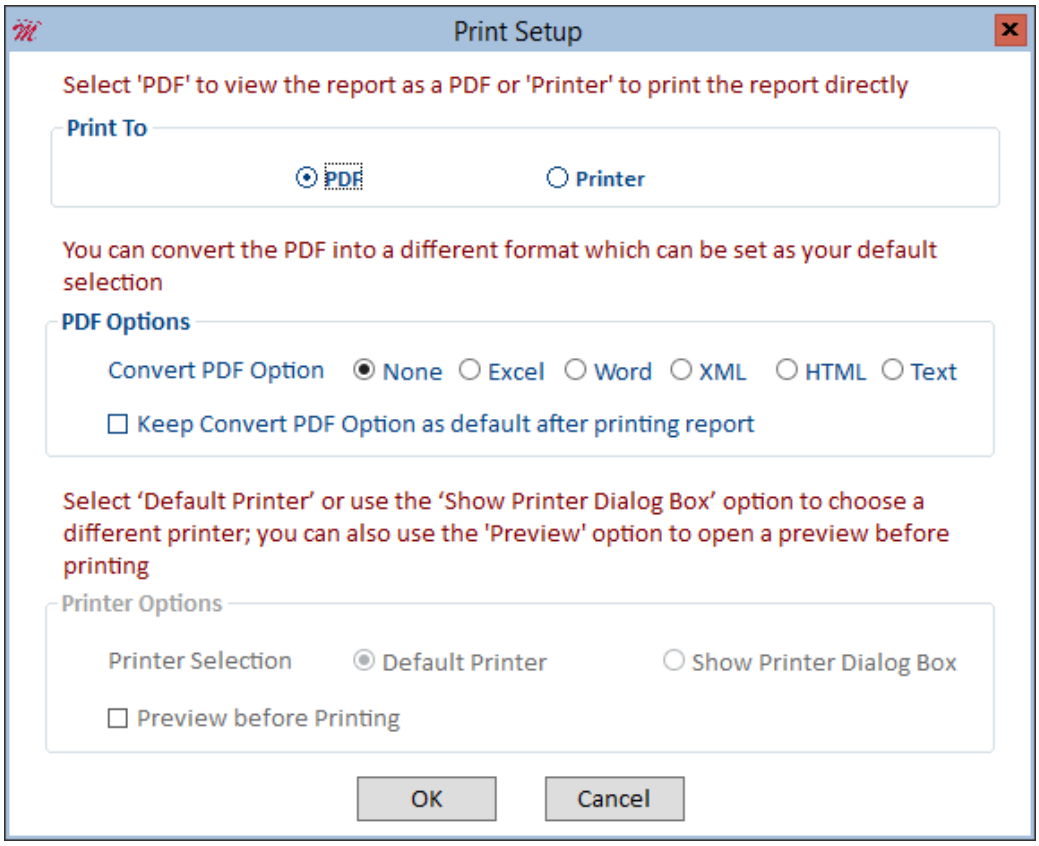
The following enhancements have been implemented in version 1.3.05 (installed the night of 10/13/2016 for customers hosted by Rapattoni).

Convert Your Reports from PDF to Excel, Word, and Other Formats

The Print Setup form has been updated with additional options for printing and generating PDFs. It is accessible from the "Actions" tab in the ribbon bar or by pressing Ctrl-I from anywhere in the system.

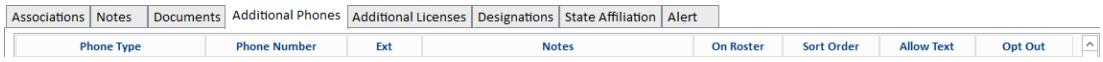
The form initially allows you to choose between running a PDF or printing directly to the printer. If PDF is selected, the report can optionally be converted to Excel, Word, XML, HTML, or a Text file to allow for data to be exported or modified. An additional check box allows you to retain this selection as the default setting for future reports.

When the Printer option is selected, you can choose whether to print to the default printer or bring up the printer dialog box to select a different printer. You can also open the report as a preview before printing if desired.

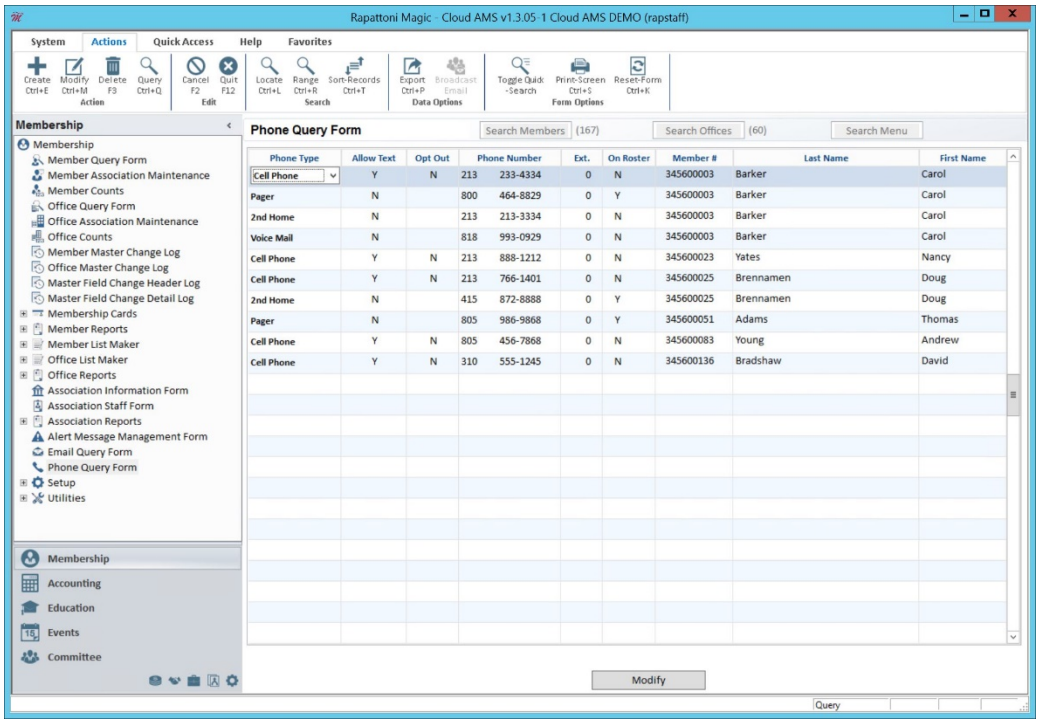


New Text Messaging Options and Phone Query Form

"Allow Text" and "Opt Out" columns are now available in the Additional Phones table on the Member Information Form, allowing you to track which member phones can receive text messages and which should be opted out. In addition, a new "Allow Text" field in the Phone Type Table lets you set a default value for each individual phone type.

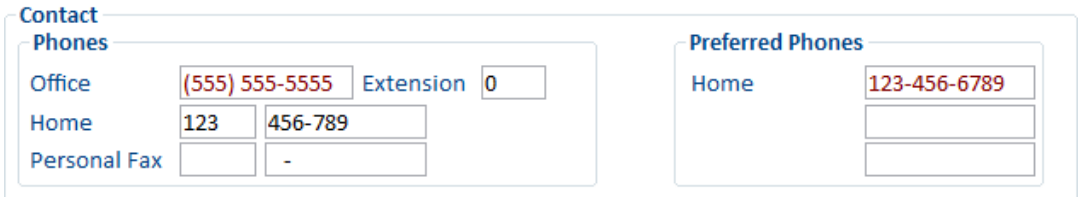


To work with this phone data, a new Phone Query Form allows you to range on phone type and then export member phone data, with the ability to exclude members who have opted out of text messaging.



Preferred Phones Added to Member Information

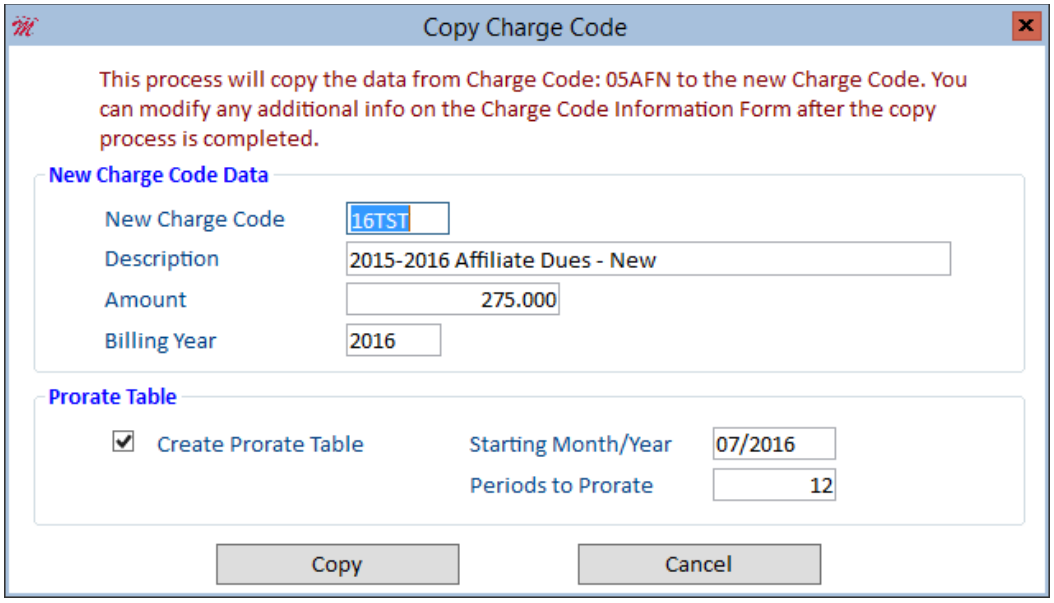
The Member Information form now includes a "Preferred Phones" section showing the phone numbers designated as Primary, Secondary, and Other in the member's preferences. Each phone number displays with its corresponding label.



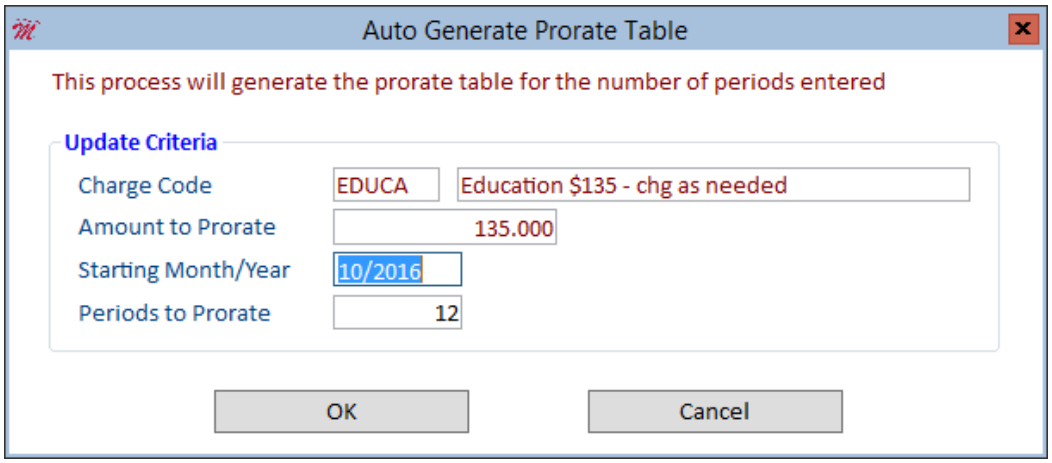
New Charge Code Table plus Copy and Auto-Prorate Features

A new Charge Code Table is now available under Billing Setup, allowing users to view all Charge Codes in a single table without filtering by Charge Code Set. A column showing Proration periods is included in this table.

On the Charge Code Information Form, a new “Copy Charge Code” button can be used to create a new Charge Code based on the selected Charge Code. The initial Charge Code data can be updated on the Copy Charge Code form and additional fields can be modified after the Charge Code is created. For Charge Codes that include proration, the Prorate Table can be created with the Starting Month/Year and the number of Periods copied over and calculated based on the new Charge Code’s Amount field.



The process for adding proration to existing Charge Codes has also been streamlined. From the Charge Code Information Form, clicking the “Prorate Table” button for a Charge Code that was not previously set up with proration will open a new Auto Generate Prorate Table dialog. Users may enter the Starting Month/Year and Periods to Prorate on this form and click “OK” to automatically create the table, or click “Cancel” to manually create the Prorate Table instead.



In addition to these changes, the "Prorate Table" button on the Charge Code Information Form has been updated to display the number of proration periods.

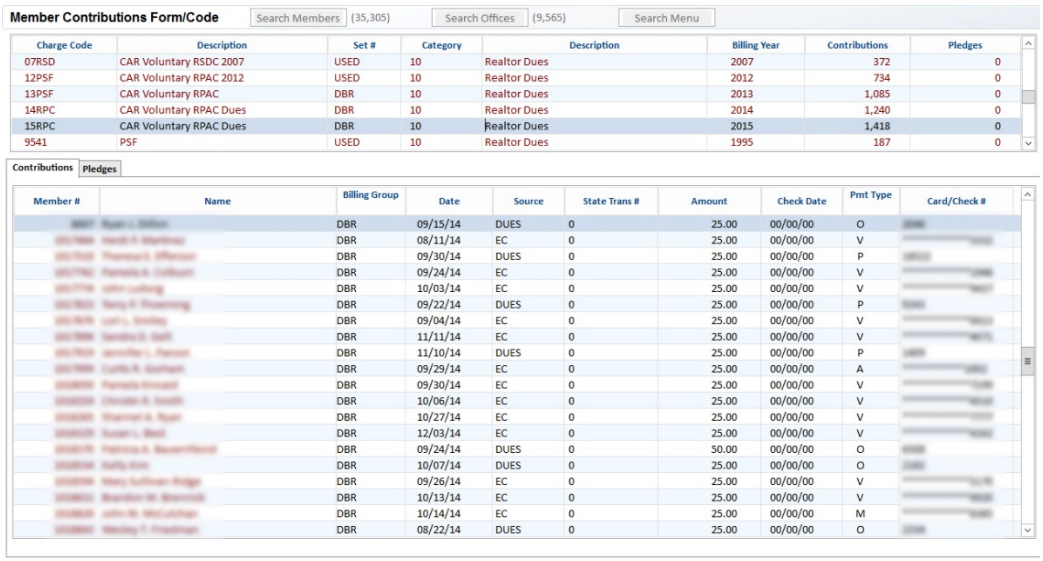
"Billing Email" Field Added to Membership

A new "Billing email" field has been added to Member Information. This new email field is leveraged in the Cloud AMS Billing programs as well as the Print Statements/Invoice and Print Receipts programs. Note that for members with no Billing email stored in the database, Cloud AMS will default to the member's standard Association email when running email billings.

The new "Billing email" field can also be added to IMS so that members can update their email addresses. You may enable the field for IMS once your association is ready to begin using it.

New Contributions Form Queries Members by Charge Code

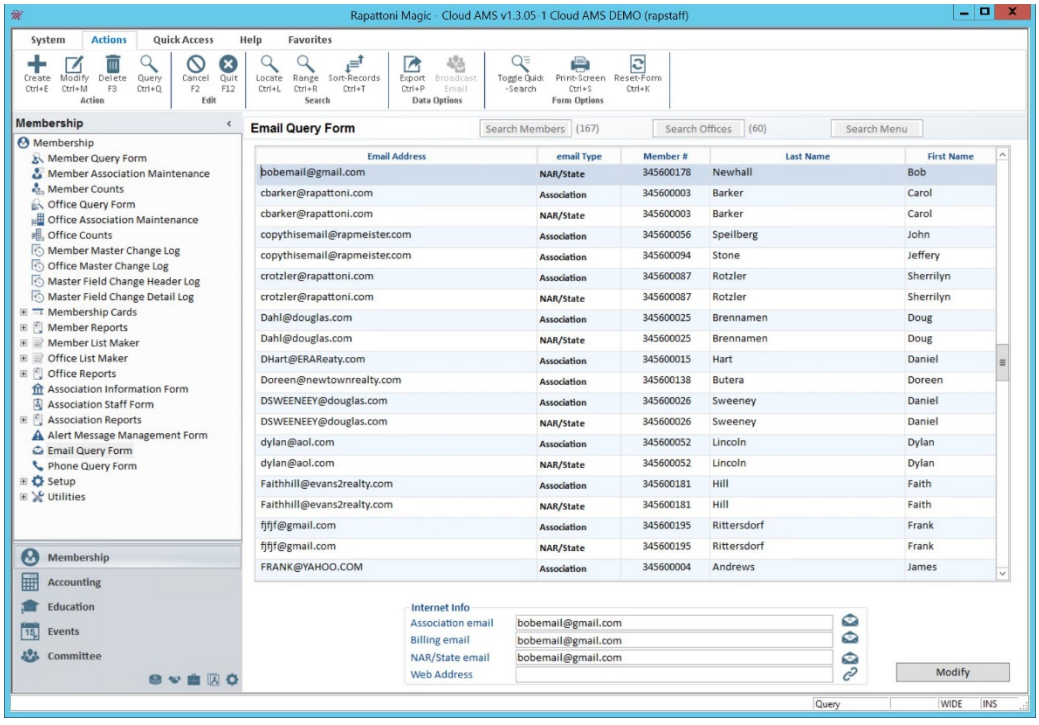
As an alternative to reviewing contributions for individual members, a new Member Contributions Form/Code program allows you to view all members that have made contributions for a selected Charge Code. This data can then be exported or it can be used to send broadcast emails.



In addition, the old Contributions form which queries by member has been renamed to "Member Contributions & Pledges Form" in the navigation bar and menu quick search in order to distinguish it from the new form.

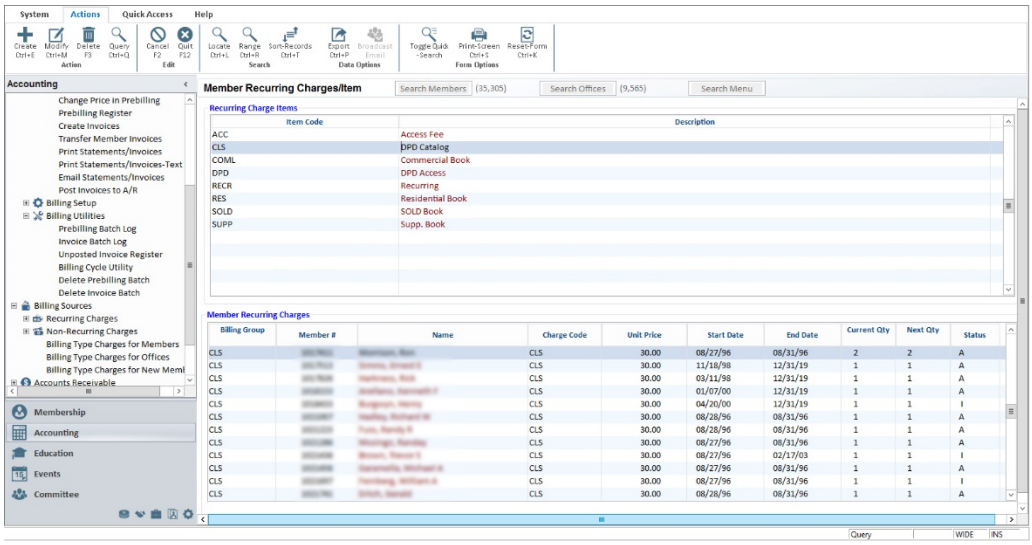
Redesigned Email Query Form

The Email Query Form has been updated to display inside the main Cloud AMS workspace rather than opening as a pop-up, and has been redesigned to present information in a grid with filtering, sorting, and additional tools.



Exports and Additional Updates for Recurring and Non-Recurring Charges

The Member Recurring Charges/Item form and the Member Non-Recurring Charges/Billing Group form have been updated with Export functionality, allowing for records to be exported using the field chooser in the Cloud AMS Export Manager.



The main Member Recurring Charges and Member Non-Recurring Charges forms have also been updated with new radio button options allowing the forms to show "All Members" or "Only Members with Charges."

In Addition, the Non-Recurring Charges programs have been updated to open inside the main Cloud AMS workspace rather than as pop-ups, with menu items now available in the navigation bar and the menu quick search.

Allow IMS Logins Using Email Address

As an optional feature, your association can now allow members to log onto IMS using an Association Email address instead of Login ID.

By default, IMS will continue to require Login ID without permitting logins using Association Email. Please contact Rapattoni *Magic* Support at 866-730-7115 if you'd like to enable IMS logins using Association Email addresses.

Note that if email logins are enabled for IMS, the Login ID field will be automatically set to accept up to 80 characters, overriding the previous maximum length setting to ensure that the field can accommodate long email addresses.

Rapattoni *Magic*-Cloud AMS Maintenance Report

1.3.05

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 items have been implemented in version 1.3.05 (installed the night of 10/13/2016 for customers hosted by Rapattoni).

Broadcast Emails

When running a broadcast email, in some instances the mailing was not picking up all members due to exceeding the maximum character limit for the BCC list. This has been fixed so that the system will generate multiple emails when necessary to include all registrants, with a prompt notifying the user that multiple emails will be generated. (RNI 160914-000035)

For broadcast emails generated from the Class Registration Form or Event Registration Form, registrants who had cancelled were inadvertently being included in the broadcast email. This issue has been resolved so that registrants who cancelled are not included in the broadcast emails. (RNI 160914-000191)

Class Information

On the Class Information Form, the “Print Tickets” and “OK to Purge” check boxes were not being saved on exit. This has been fixed and these check box selections are now saved as intended. (RNI 160721-000065)

Exports

Exports run from the Event Registration Form and Class Registration Form now include a section with supplemental information. (RNI 160627-000189)

Statements/Invoices

The Statement/Invoice Setup Form previously was not displaying the Minimum Balance fields. This has been fixed so that “Balance” and “Percentage” fields are now available when the Minimum Balance Option is selected while setting up a Statement/Invoice Type. (RNI 160826-000065)

Previously, the ‘Association BCC Email Address’ option could only be set up from the Email Statements/Invoices Form, and the feature would then apply to the entire billing. It is now possible to enable the ‘Association BCC Email Address’ option and manually input an email address when printing receipts from a member’s Accounts Receivable Form, allowing the feature to be used for individual members. (RNI 160606-000252)

On the Batch Total Query Form, the system would not display the detailed lists of invoices as intended, and it was not possible to exit from the resulting form. This issue has been fixed and buttons have been added to the form for navigating to Receipts, Void Receipts, Invoices and Void Invoices.

For customers who host their own Cloud AMS systems, please call Rapattoni at 866-730-7115 to schedule your upgrade and begin enjoying the many benefits of Rapattoni *Magic*-Cloud AMS 1.3.05.