# Release Highlights 2.1

Rapattoni Magic-Cloud AMS 2.1 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 2.1:

- New Payment Workflow with IMS Integration

- Redesigned Accounts/Receivable Form

- Member Dues History Form by Code Now Available

- Advanced Range Enhancements

- "Attended" Criteria Added to Class Registration Form

- Office County Fields Now Available for Member Queries, Office Information, and Exports

- New "Amount" Columns

- Credit Card Expiration Form Updates

- Searchable Inventory Description on Inventory Information Form

- Class History Form Redesigned

- AMS Default Values for Preferred Mail, Media, and Publication

- New "MLS Email" Field Now Available

- New Prompt Allows Quick Access to Sales Invoice Form

- Batch Password Field

- Navigation Menu and Ribbon Bar Improvements

- "Manage Credit Card Information" Link Now Available for IMS Setup

- Additional IMS Enhancements

- New Rapattoni Magic API

**New Payment Workflow with IMS Integration**

*Click here to view a short video tutorial highlighting the new payment workflow!*

Credit cards that association members store on Internet Member Services (IMS) may now be used for recurring payments and other charges in Cloud AMS. Authorized staff can also view, modify, or enter credit card info within Cloud AMS using the new Member Credit Card Info form.

| Member Credit Card Info | |
|---|---|

**Member**

| 22054 | Carol Barker |
|---|---|

**Payment Info**

Status　　　　　　⊙ Active　　　○ Pending　　　○ Inactive

| Card Type | V | Visa |
|---|---|---|
| Credit Card Number | 4111111111111111 | |
| Expires | 01/21 | |
| CID | | |

**Credit Card Billing Address**

| Name on Card | Carol Barker |
|---|---|
| Address | 457 Sunningdale Drive |
| City, State, Zip | Rancho Mirage　CA　92270 |

**Billing**

| Invoice Type | |
|---|---|
| Sort Sequence | |

**Member's IMS Selections**

☑ Default Card

☑ Allow Auto Billing

| Save | Delete | Cancel |
|---|---|---|

In addition, the Member Query Form and Member Information Form have been updated with a new "Credit Cards" tab allowing quick access to payment information.

| | # | Card Type | Credit Card # | CID | Expires | Sort Seq. | | Invoice Type | Status | Entered By | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Associations | Notes | Documents | Additional Phones | Additional Licenses | Designations | State Affiliation | Alert | **Credit Cards** | | | |
| | 1 | V  Visa | ************1111 | | 09/21 | A | D | Membership Dues | A  KKoegle | 10/06/17 | |

The Member Information Form has also been updated to display the selected member's Balance Due under the "Billing" section, allowing staff to view this information without opening the Accounts Receivable Form.

**Billing**

| Cycle | | Preferred Method | Email ▾ |
|---|---|---|---|
| Balance Due | 5,699.97 | 15 Unpaid Invoice(s) | |

The updated Cash Receipts Posting Form allows staff to enter the Amount Received and then select one or more invoices to apply payments.

**Cash Receipts Posting Form**

Batch Info

| Batch ID | DCVERT | Display Invoices by | ⊙ Member | ○ Office | ○ Billing Office | **Amount Received** | Total Applied | 405.00 |
|---|---|---|---|---|---|---|---|---|
| Billing Group | MCAR | Member # | 22054 Carol Barker | | | 405.00 | Left to Apply | 0.00 |
| Receipt Date | 11/08/17 | Office # | 12553 Advanced Realty Specialists | | | | Balance | 4,261.00 |

○ View All Invoices   ⊙ Unpaid Only          ☑ Pay All          ☐ Reset All

| Invoice # | Date | Group | Member # | Status | Invoice Type | Amount | Amount Due | Apply | Applied | Balance | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1065532 | 01/01/14 | MCAR | 22054 | | Magical Access | 45.00 | 45.00 | ☐ | 0.00 | 45.00 | |
| 1066701 | 06/04/14 | MCAR | 22054 | | Magical Access | 45.00 | 45.00 | ☐ | 0.00 | 45.00 | |
| 1073615 | 10/01/14 | MCAR | 22054 | | Payment Plan | 1,287.00 | 1,284.00 | ☐ | 0.00 | 1,284.00 | |
| 1083490 | 03/07/16 | MCAR | 22054 | | Membership Dues | 259.00 | 259.00 | ☐ | 0.00 | 259.00 | |
| 1084696 | 03/07/16 | MCAR | 22054 | | Membership Dues | 259.00 | 258.00 | ☐ | 0.00 | 258.00 | |
| 1085902 | 03/07/16 | MCAR | 22054 | | Membership Dues | 25.00 | 25.00 | ☐ | 0.00 | 25.00 | |
| 1093605 | 01/09/17 | MCAR | 22054 | | Non Member Dues | 1,100.00 | 1,100.00 | ☐ | 0.00 | 1,100.00 | |
| 1093714 | 01/24/17 | MCAR | 22054 | | Membership Dues | 405.00 | 405.00 | ☐ | 0.00 | 405.00 | |
| 1094958 | 01/25/17 | MCAR | 22054 | | Membership Dues | 405.00 | 405.00 | ☐ | 0.00 | 405.00 | |
| 1096202 | 01/26/17 | MCAR | 22054 | | Membership Dues | 405.00 | 405.00 | ☐ | 0.00 | 405.00 | |
| 1097446 | 01/27/17 | MCAR | 22054 | | Membership Dues | 405.00 | 405.00 | ☑ | 405.00 | 0.00 | |
| 5070993 | 08/28/17 | MCAR | 22054 | | Membership Dues | 30.00 | 30.00 | ☐ | 0.00 | 30.00 | |

| Incurring Member | 22054 | Carol Barker | | Status | A | Office | 12553 | Advanced Realty Specialists | Status | A |
|---|---|---|---|---|---|---|---|---|---|---|

| Invoice Detail | | Pay | | Create Invoice |
|---|---|---|---|---|

Clicking the "Pay" button opens the new Post Payment Form, where staff can select a stored credit card or enter new credit card info for the payment. Note that the form only includes active (i.e., non-expired) cards.



This new form is centralized across all programs in Cloud AMS as well as IMS, including the Sales Invoice Form, Class Registration Form, and Event Registration Form, providing a consistent user experience for processing credit card transactions.

For customers who use CCIM to process credit card transactions, credit card information will be stored on the National Association of REALTORS® E-commerce Network using this standard interface rather than the separate NAR interface. Note that NAR does not allow stored credit cards to be modified so cards stored via CCIM will instead need to be deleted and re-created when changes are required.

To support automated billings, the IMS Preferences Setup Form has been updated with a new "Allow Auto Billing" option under the "Payment Preferences" section. When checked, staff may set the Invoice Type and Sort Sequence associated with credit cards which have auto billing enabled.



When this feature is enabled, the Credit Card Information form in IMS will include an "Allow Auto Billing" option that members can use to authorize credit cards for automated dues payments.

Note that the new "Allow Auto Billing" option will be unchecked by default when the feature is initially deployed. In order to enable this new feature within IMS, your association staff will need to check the "Allow Auto Billing" option and select corresponding values for Invoice Type and Sort Sequence on the IMS Preferences Setup Form.

As part of this update, Cloud AMS now leverages a consolidated Credit Card Log showing transactions from both AMS and IMS. A unique "Payment Ref." field stores the approval code for all merchants, including the National Association of REALTORS®. The consolidated Credit Card Log also includes an "Approved" column which can be ranged on, and the Range feature has been optimized to return faster results for all columns.

**Credit Card Log**

| Source | Date | Time | Member # | Type | Card Number | Expires | Receipt # | Amount | Used ID | Transaction # | Approved | Payment Ref. |
|--------|------|------|----------|------|-------------|---------|-----------|--------|---------|---------------|----------|--------------|
| IMS | 11/08/17 | 3:53:19pm | 24217 | M | ************4444 | 09/21 | 56794 | 33.00 | | 859000031112 | | 18333351 |
| AMS | 11/08/17 | 3:15:29pm | 24217 | V | ************1111 | 09/20 | 56793 | 150.00 | KKoegle | 859000031111 | Y | 18333350 |
| IMS | 11/08/17 | 3:10:56pm | 24217 | V | ************1111 | 09/20 | 56792 | 170.00 | | 859000031110 | | 18333349 |
| IMS | 11/08/17 | 2:30:31pm | 24217 | V | ************1111 | 09/20 | 56791 | 180.00 | | 859000031109 | | 18333348 |
| IMS | 11/08/17 | 2:10:39pm | 24216 | M | ************4444 | 09/18 | 56790 | 150.00 | | 859000031108 | | 18333347 |
| IMS | 11/08/17 | 2:08:55pm | 24216 | V | ************1111 | 09/19 | 56789 | 180.00 | | 859000031107 | | 18333346 |
| IMS | 11/08/17 | 12:21:46pm | 24200 | V | ************1111 | 09/23 | 56788 | -23.00 | | 859000031106 | | 0 |
| IMS | 11/08/17 | 11:59:25am | 24200 | V | ************1111 | 09/23 | 56786 | 33.00 | | 859000031104 | | 18333345 |
| AMS | 11/08/17 | 11:53:25am | 24218 | V | ************1111 | 09/27 | 56785 | 505.00 | KKoegle | 859000031103 | Y | 18333344 |
| AMS | 11/08/17 | 11:03:24am | 2590 | V | ************1111 | 07/23 | 56784 | 20.00 | julie | 859000031102 | Y | 18333343 |
| AMS | 11/08/17 | 10:51:22am | 24175 | V | ************1111 | 03/23 | 56782 | -25.00 | KKoegle | 859000031101 | Y | 18333340 |
| AMS | 11/08/17 | 10:48:52am | 24175 | V | ************1111 | 03/23 | 56781 | 25.00 | KKoegle | 859000031100 | Y | 18333339 |
| IMS | 11/08/17 | 10:16:18am | 22183 | M | ************5100 | 01/19 | 56780 | 33.00 | | 859000031099 | | 18333338 |
| AMS | 11/08/17 | 7:45:47am | 22003 | A | ************0005 | 12/19 | 56779 | 77.89 | rapstaff | 859000031098 | Y | 18333337 |
| AMS | 11/07/17 | 4:22:39pm | 24111 | V | ************1111 | 02/20 | 56778 | 155.00 | tmarshal | 859000031097 | Y | 18333336 |
| AMS | 11/07/17 | 11:13:17am | 24175 | D | ************9424 | 09/24 | 0 | 60.00 | KKoegle | 31096 | N | |
| AMS | 11/07/17 | 11:12:54am | 24175 | D | ************9424 | 09/24 | 56771 | -60.00 | KKoegle | 859000031095 | Y | 18333331 |
| AMS | 11/07/17 | 11:10:51am | 24175 | D | ************9424 | 09/24 | 56770 | 120.00 | KKoegle | 859000031094 | Y | 18333330 |
| AMS | 11/07/17 | 11:08:40am | 24175 | D | ************1117 | 09/23 | 0 | 130.00 | KKoegle | 31093 | N | A120A7CD3CCF |

Search Members (4,134)   Search Offices (1,209)   Search Menu

**NRDS Request**
Member  Nicole Y. Harris, GRI        Transaction Type  P        Merchant #  8591   Merchant Type  N

**Response**
Result Message  Your transaction has succeeded.
Authorization Result Code  0        Settlement Result Code  0        Settlement Response Date  11/08/17

Check Status        Create Receipt        Rap Only

To work with the consolidated credit card logs, the Credit Card Transaction Report now includes an "AMS or IMS" drop-down that allows you to query either or both systems when running the report.

**Credit Card Transaction Report**

**Selection Criteria**

AMS or IMS   AMS ▾
             AMS
Batch ID     IMS           e Batches Selected
             AMS and IMS

Dates   From  11/09/17   Time  00:00:00
        Thru  11/09/17   Time  23:59:59

☐ Print Incomplete Transactions Only

Create Report        Exit

## Redesigned Accounts/Receivable Form

Cloud AMS's Accounts Receivable feature has been reorganized and redesigned to provide a more efficient workflow.



The "Show Archived" button has been replaced with radio buttons for toggling the display of archived records. The "Additional Info" button has also been relocated to the bottom of the form and is only enabled for use if staff manually changed the invoice's Billing Address or Shipping Address information.

## Member Dues History Form by Code Now Available

This new form allows you to view Member Dues History per Charge Code, enabling you to easily export the Member History for all members tied to a specific Charge Code.



The Member Dues History Form by Code is accessible from a new "Dues History" submenu under Accounting.

## Advanced Range Enhancements

The Member Query Form has been updated with new Advanced Range functionality for querying Association criteria. Clicking the "Advanced" radio button opens the Association Advanced Selection pop-up with fields for entering two sets of Association criteria. This user-friendly multi-selection interface simplifies the process of running complex Association queries based on multiple criteria values.



This type of query was previously only available from the Member Association Comparison Report. For example, the new feature allows staff to easily query members who are Active in their main association while being Inactive in the MLS association, or Active in the MLS while also being Active in their main association.

## "Attended" Criteria Added to Class Registration Form

The Class Registration Form has been updated to include an "Attended" column with Y/N options which may be used for filtering and exporting registration results.

| Registration ID | Last Name | First Name | MI | Member # | Tickets | Attended | Grade | Status | Waiting Priority # | Amount | Postmark Date | Web |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| JAN17001 | Koegle | Kathleen | M | 22206 | 1 | Y | P | R | | 33.00 | | N |

## Office County Fields Now Available for Member Queries, Office Information, and Exports

Office County is now displayed on the Member Query Form, under the Office Address tab. The field can be ranged on and can also be included in member exports.



County is also now available on the Office Information Form under Street Address and Mailing Address.

In addition, the Office Street County and Office Mail County fields are now available for exports within the following additional features:

- Committees Form
- Phones Query Form – Member
- Internet Query Form – Member
- Event Registration Query Form
- Class Registration Query Form
- Contributions Form/Charge Code
- Member List Form by List
- Non-Recurring: Item/Member
- Member Association Maintenance
- Recurring Charges: Item/Member
- Member Master Change Log
- Receipt Query Form
- Credit Card Log

## New "Amount" Columns

New "Amount" and "Total Amount" columns have been added to the header table on various forms, showing the total amount corresponding with the selected record. This new column is available on the following forms:

- Class Registration Form
- Event Registration Form
- Contribution History Form
- Dues History Form

## Credit Card Expiration Form Updates

The Credit Card Expiration Form has been updated to make member information part of the scrollable workspace rather than opening as a pop-up. In addition, expired credit cards now display in red.

| Credit Card Expiration Form | Search Members ✕ (4,134) | Search Offices ✕ (1,208) | Search Menu ✕ |

| Last Name | First Name | Member # | | Payment Type | Card/Account # | Exp Date | Sort Sequence | Invoice Type |
|---|---|---|---|---|---|---|---|---|
| Mathes | Ryan | 24183 | V | Visa | ************111 | 04/22 | | |
| Zzdefault | Member | 0 | V | Visa | ************111 | 09/22 | A | D |
| Adame | Jose | 12180 | V | Visa | ************111 | 09/22 | A | D |
| Raber | Joanne | 24091 | V | Visa | ************111 | 09/22 | A | D |
| Magana | Yadira | 22058 | M | Master Card | ************444 | 12/22 | | |
| Koegle | Brian | 24175 | V | Visa | ************111 | 03/23 | A | D |
| Magana | Yady | 22103 | V | Visa | ************111 | 03/23 | | |
| Cryder | Charlie | 2590 | V | Visa | ************111 | 07/23 | | |
| Acoba | Maybelline | 11688 | V | Visa | ************111 | 09/23 | A | D |
| Koegle | Michelle | 22117 | V | Visa | ************111 | 09/23 | A | D |
| Koegle | Kathleen | 22206 | M | Master Card | ************444 | 09/23 | A | D |
| Koegle | Kathleen | 22206 | V | Visa | ************111 | 09/23 | A | D |
| Marshall | Tyler | 24111 | V | Visa | ************111 | 09/23 | A | D |
| Koegle | Courtney | 24177 | V | Visa | ************111 | 09/23 | A | D |
| Andrews | Belle | 24191 | V | Visa | ************111 | 09/23 | A | D |
| Evans | Janelle | 24197 | V | Visa | ************111 | 09/23 | A | D |
| Rodriguez | David | 24200 | V | Visa | ************111 | 09/23 | | |
| ON | CCIM | 24181 | V | Visa | ************111 | 03/24 | A | D |
| Anderson | Annabelle | 22137 | M | Master Card | ************444 | 05/24 | A | D |
| Koegle | Mike | 24176 | M | Master Card | ************444 | 07/24 | A | D |
| Koegle | Brian | 24175 | D | Discover | ************942 | 09/24 | A | D |
| Ryan | Mathes | 24184 | V | Visa | ************111 | 05/27 | | |
| Evans | Janelle | 24197 | M | Master Card | ************444 | 07/27 | B | M |
| Brown | Mary | 24218 | V | Visa | ************111 | 09/27 | A | D |

## Searchable Inventory Description on Inventory Information Form

The Inventory Information Form has been updated with a searchable Description field. In addition, a field for Category has been added to the form.

| Inventory Information Form | Search Members ✕ (4,134) | Search Offices ✕ (1,209) | Search Menu ✕ |

| Charge Code | Description | | Category |
|---|---|---|---|
| PENC | Pens and pencils | 6 | Arrow Signs |
| PKTFS | Pocket Fisherman | 99 | Attitude Adjusters |
| PPMAK | Popeil Pasta Maker | 99 | Attitude Adjusters |
| PTBR | Proud To be A Realtor | 5 | Signs - Misc |
| RBLW | Realtor Black Leather Watch | BA | Babies for Sale |
| READ | Success as a real Estate Agent | 4 | Books |
| RELE | Real Estate License Exam | 4 | Books |
| ROTIS | Rotisserie and BBQ Oven | 99 | Attitude Adjusters |
| RPCC | Realtor Proof Calculator | BA | Babies for Sale |
| SGN01 | Yellow For Sale Sign | 6 | Arrow Signs |
| SGN10 | Sign 10 | 6 | Arrow Signs |
| SGN11 | Sign 11 | 6 | Arrow Signs |
| SGN2 | Sold Sign | 5 | Signs - Misc |
| SGN3 | Sign - SPA | 5 | Signs - Misc |
| SGN4 | Sign Open house | 7 | Open House Signs |
| SGN5 | Sign open house rect | 7 | Open House Signs |
| SGN6 | Open house Sign | 7 | Open House Signs |
| SGN7 | Sign 7 | 5 | Signs - Misc |
| SGN8 | Sign 8 | 5 | Signs - Misc |
| SGN9 | Sign 9 | 5 | Signs - Misc |
| STJO | ST. Joseph Home Seller Statue | BA | Babies for Sale |
| TSH1 | Tshirt designs | 12 | TShirts |
| TSH2 | Tshirt assorted 2 | 12 | TShirts |
| TSH3 | Tshirt assorted 3 | 12 | TShirts |
| TSH4 | Tshirt assorted 4 | 12 | TShirts |
| TSH5 | Tshirt assorted 5 | 12 | TShirts |
| WINE | Whine with Your Wine Tax Party | 1 | test |

Inventory Info

## Class History Form Redesigned

The Class History Form which is accessed from the Member Information Form has been redesigned to include the following new columns:
- Registration ID
- Start Time
- End Time
- Billed
- Balance Due



In addition, the form's buttons have been moved to the bottom of the interface, with new "Course Info" and "Registration" buttons added to allow quick access to the corresponding features.

## AMS Default Values for Preferred Mail, Media, and Publication

Default values for Preferred Mail, Preferred Media, and Preferred Publication can now be set on the Defaults & IMS Form Profile interface. Make sure the "Defaults" radio button is selected, choose "AMS1 AMS Defaults" under the "Code" drop-down, and click the "Go" button to open the Browse - Defaults form showing the new options. Note that the Status for Field Code must be set to Active for the selected options.

### New "MLS Email" Field Now Available

A new "MLS email" field is now available to track MLS email addresses for members separately from their personal email addresses. The new field can be modified on the Member Information form, it displays on the Member Email Query and Profile Report, and it is available for all member exports.



The new "MLS email" field can also be added to IMS so that members can update its value. Please contact Rapattoni Support for assistance if you would like to add this field to IMS.

Note that this initial release covers adding "MLS email" to the Member Profile and making it available for manual exports. Support for adding the field to programs that transmit data directly to the MLS will be added in a future release.

### New Prompt Allows Quick Access to Sales Invoice Form

For member records which have no invoices available, clicking the "A/R" button now generates a prompt allowing staff to open the Sales Invoice Form.
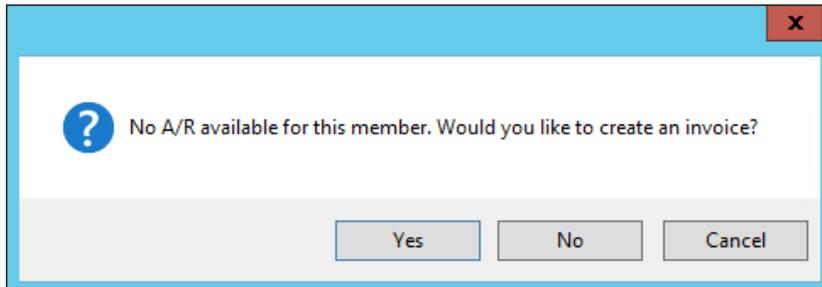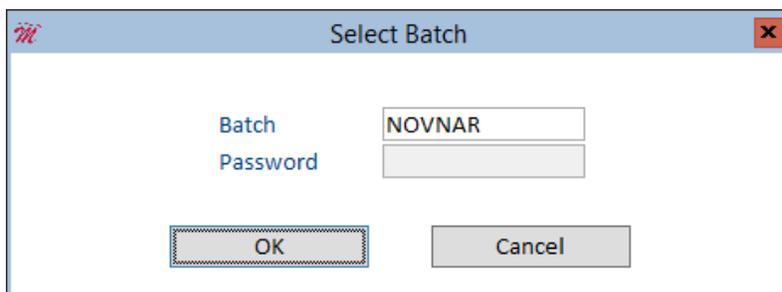


### Batch Password Field

When selecting a batch for the Class Registration, Event Registration, Convention Registration, or Post Payment forms, the "Password" field is automatically low-lighted and disabled if no Password is required, and the cursor will park on the "OK" button so you can press Enter to proceed without using the mouse to click the button. Alternatively, the cursor will park on the "Password" field if a Password is required.

## Navigation Menu and Ribbon Bar Improvements

The Cloud AMS navigation menu and ribbon bar have been updated with:
- Miscellaneous functionality enhancements
- New hover text for navigation icons
- Usability improvements and bug fixes

## "Manage Credit Card Information" Link Now Available for IMS Setup

A "Manage Credit Card Information" link is now available to be added to the IMS menu, allowing members to access their credit card information directly within IMS.
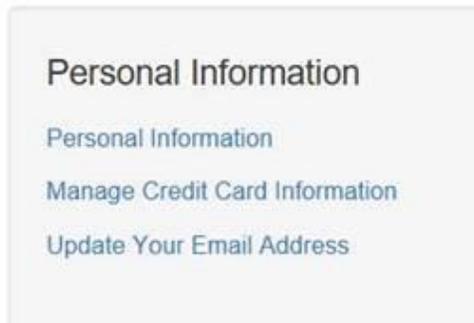


Note that the new "Manage Credit Card Information" link will not be added to the IMS menu by default when the feature is initially deployed. In order to enable this new feature within IMS, your association staff will need to access the IMS Setup Form in Cloud AMS, select the IMS association, and click the "Services" button to open the Internet Member Services Form. On this form, staff can add a new service with Service Code set to "CCI" (Credit Card Information), Description set to "Manage Credit Card Information" text, Type set to "Internal" and Status set to "A" (Active). Menu Group and Sort can both be set as desired by your association.

| Service Code | Description | Display Name | Type | Status | Menu Group | Sort | |
|---|---|---|---|---|---|---|---|
| CCI | Credit Card Information | Manage Credit Card Information | Internal | A | 210 Personal Information | 2 | |

## Additional IMS Enhancements

The IMS Preferences Setup Form has been updated with a new "Enable Carousel" check box that may be used to enable or disable the IMS site's scrolling carousel marquee.



In addition, the IMS site's Member Search now includes a "realtor.com" link to open the member's profile.

## New Rapattoni *Magic* API

A new Rapattoni *Magic* API (Application Programming Interface) is now available, allowing your association to provide third parties with access to live membership data via API while controlling which fields and data are accessible.
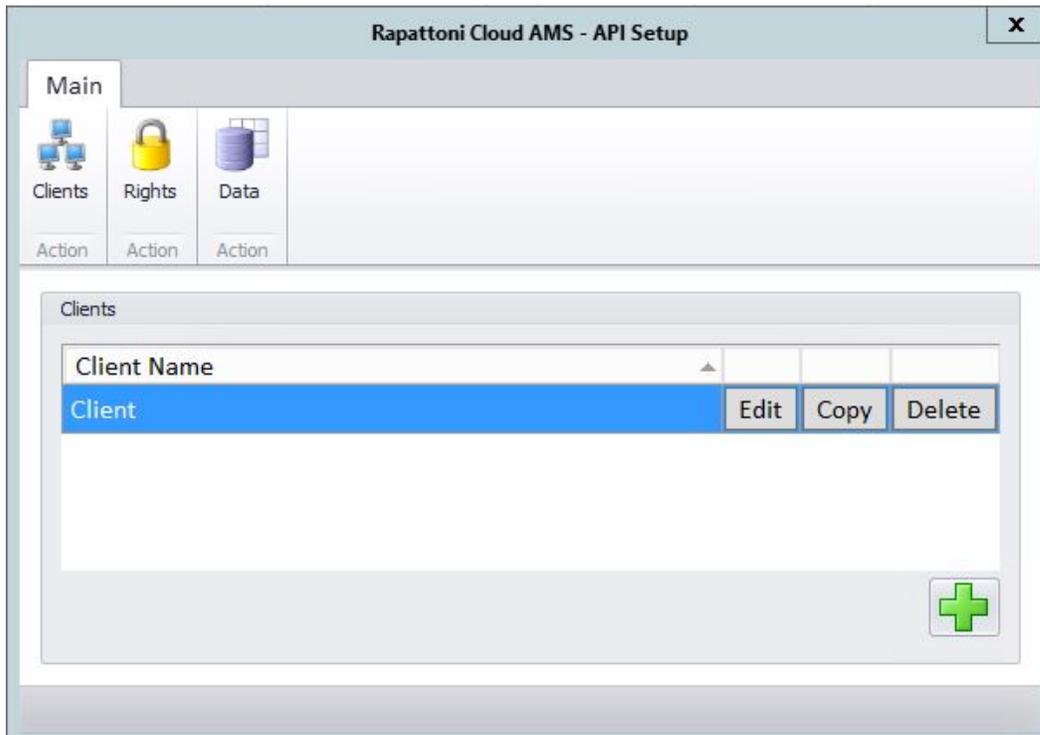


The API can be set up using a new "API Configuration" menu option which is available under the "Rapattoni Magic API" heading in the Communication module.

Additional information on accessing and querying the new Rapattoni *Magic* API is available at http://www.rapattoni.com/dev under the "Membership API" heading. You may also contact Rapattoni Support for assistance setting up the API.

# Rapattoni *Magic*-Cloud AMS Maintenance Report
## 2.1

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 2.1.**

### Membership

When "IMS Login ID / Email Option" is set to "Email Only" for Member Defaults on the Office/Member Edit Control, the Member Information Form will now prevent staff from modifying the pre-populated IMS Login field. The form will display low-lighted "Association email" text to indicate the source of the user's IMS Login. (RNI 170911-000148)

The Member/Office Quick Search now displays records with alerts in red text. An asterisk displays next to the Member # or Office #, with hover text showing the alert text. In addition, records with alerts on the Member Query Form and Office Query Form now continue to show in red text after they're selected (the red text previously only showed when the record was unselected). Finally, changes to alerts are now tracked in the Change Log detail. (RNI 170323-000353)

The "License Type Description" field is now available for Member and Education exports. (RNI 170810-000125)

The "…" Quick Lookup button was previously missing from certain columns on the Member Master Change Log and Office Master Change Log. This has been fixed so that the Quick Lookup button is available as intended. (RNI 170222-000383)

When adding a new office and advancing to the Association table, the system would tab through each field without opening the Association table so the user can modify the default values. This has been fixed so that the Association table opens as intended in this scenario. (RNI 170104-000184)

When attempting to email a receipt or invoice from your default Outlook Email Address, the system was still pulling the default Association Email Address instead and the email was failing to send in some instances. This issue has been corrected so that the default Outlook Email Address is pulled as intended. (RNI 170222-000141)

When selecting any filter on the Member Association Maintenance form, the filter appeared in the upper-left corner of the form instead of beneath the selected column heading. This has been fixed so that the filter displays directly beneath the field that is being filtered. (RNI 170428-000089)

From the Office Query Form, repeatedly using the Locate feature to search on Office Email criteria would trigger a Magic xpa Runtime Engine error. This has been fixed so that the Locate feature no longer triggers the error. (RNI 170505-000113)

## Accounting

On the A/R Query Form, selecting "A" ("All") under Display Option would lock up the form and prevent the user from exiting. This issue has been resolved so that the "A" option allows users to scroll through all A/R records, work on the form, or exit. (RNI 170727-000223)

The Sales Invoice Form has been redesigned to show Billing, Shipping, and Comments directly on the screen without using tabs. The font size was also increased and a duplicate confirmation for Print Receipt was removed. (RNI 170905-000066)

The Credit Card Expiration Merge Form was previously formatting the date incorrectly, causing a 4/18 expiration date (for April 2018) to incorrectly show as 4/18/2017 when exported to Excel. This issue has been corrected so that expiration dates are properly formatted using the final day of the specified month. For example, 4/30/18 would be exported for an April 2018 expiration date. (RNI 170612-000203)

The "Office Recurring Charges" menu option was previously opening the "Office Recurring Charges by Item" form, and the "Office Recurring Charges by Item" menu option was opening the "Office Recurring Charges" form. This has been corrected so that each menu option opens the correct form. In addition, the Office Recurring Charges form has been updated with a radio button allowing you to view only offices with charges, similar to the Member Recurring Charges form. (RNI 170802-000220)

The Write Off Unpaid Invoices form was not generating the PDF report as intended for the "Report Only" and "Write Off and Report" options. This issue has been fixed so that the PDF report is generated properly. (RNI 170801-000142)

The "ACH Payment Processing" option has been removed from the Accounting/Bank Processing menu in order to leverage the new payment workflow. (RNI 171011-000049)

On the Receipt History Form, the "IMS Receipt Detail" button has been renamed to "Payment Detail" and the "Payment Reference" field has been updated to show the correct label for all merchant type descriptions. Now that IMS and AMS credit card transactions are stored in one log within Cloud AMS, you can use the Payment Detail feature to quickly verify whether any given receipt was paid on IMS or within Cloud AMS. (RNI 170605-000270)

For the Receipts and Print Invoice features, the Email Subject now includes Association name after the Invoice #. (RNI 170905-000129)

## Education

When opening the Class Attendance Form to modify attendance, the Attendance table was popping out in a separate window which had to be minimized in order to proceed. This issue has been corrected so that the table displays within the Class Attendance Form without popping out into a separate window. (RNI 170607-000045)