

Release Highlights 2.2

Rapattoni *Magic*-Cloud AMS 2.2 is here! This exciting new version gives your association access to the enhancements listed below as well as a number of maintenance updates.

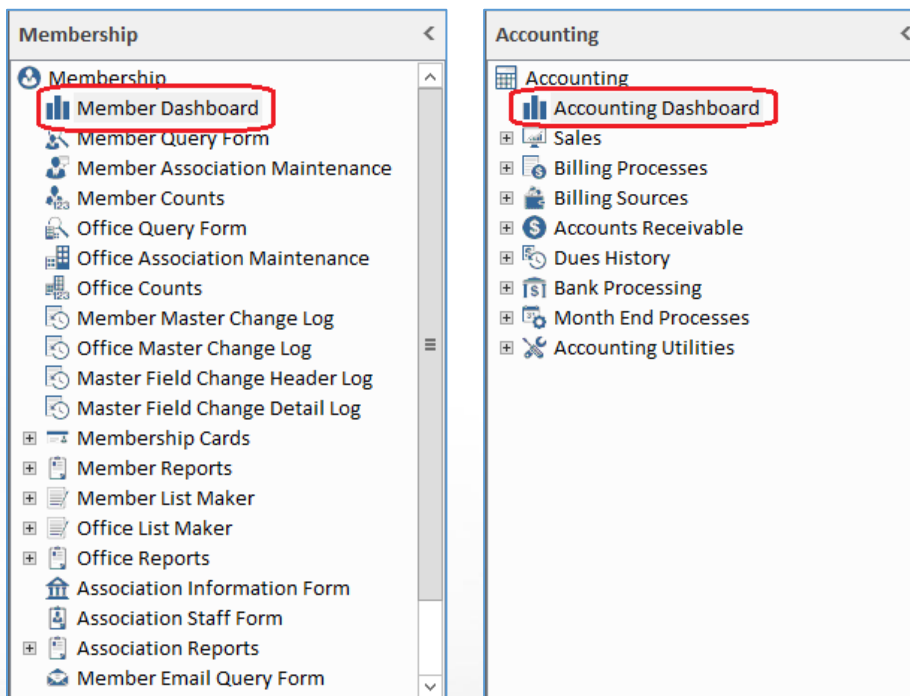
The following enhancements have been implemented in version 2.2:

- New Member and Accounting Dashboards Now Available
- Cloud AMS Application Programming Interface (API) Updates
- Record Counts Added to Member and Office Query Forms
- Download CDB Education Tracking for All Members
- Code of Ethics Data Now Included in “Get from CDB” Feature
- Education Requirements Tracking from Member Record
- New “Reference” Field Added to Contributions Form and Exports
- Credit Card Expiration Form Updated with “Auto Pay” and “Entered By” Columns
- Auto Pay Option Added to Credit Cards Tab on Member Forms

New Member and Accounting Dashboards Now Available

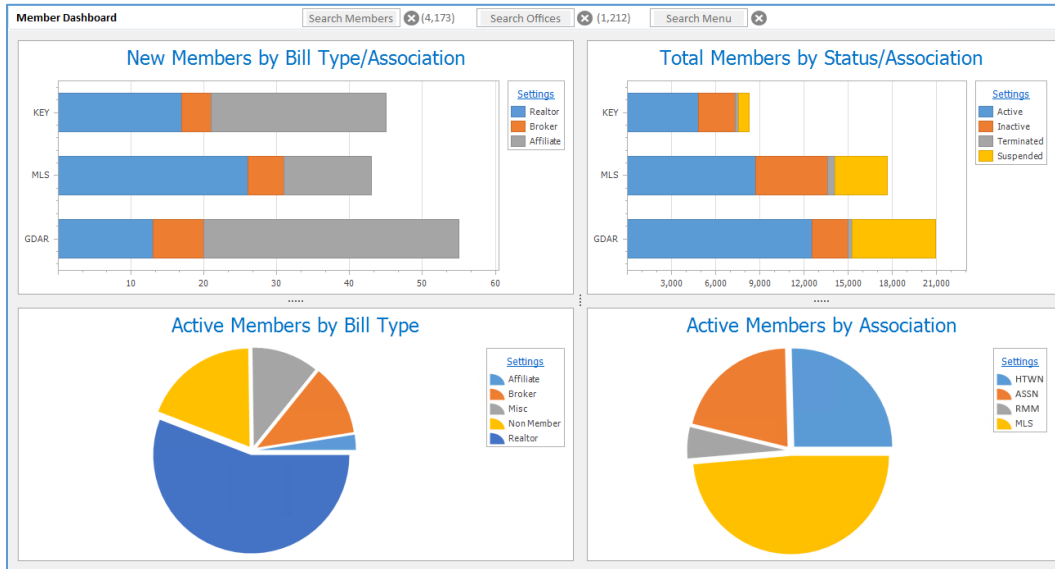
New **Member Dashboard** and **Accounting Dashboard** features are now available for authorized users in Cloud AMS. The new dashboards provide at-a-glance statistical information on membership counts, annual revenue, balances due, and more.

The **Member Dashboard** is available under the “Membership” menu and the **Accounting Dashboard** is available in the “Accounting” menu on the left side of the Cloud AMS interface.



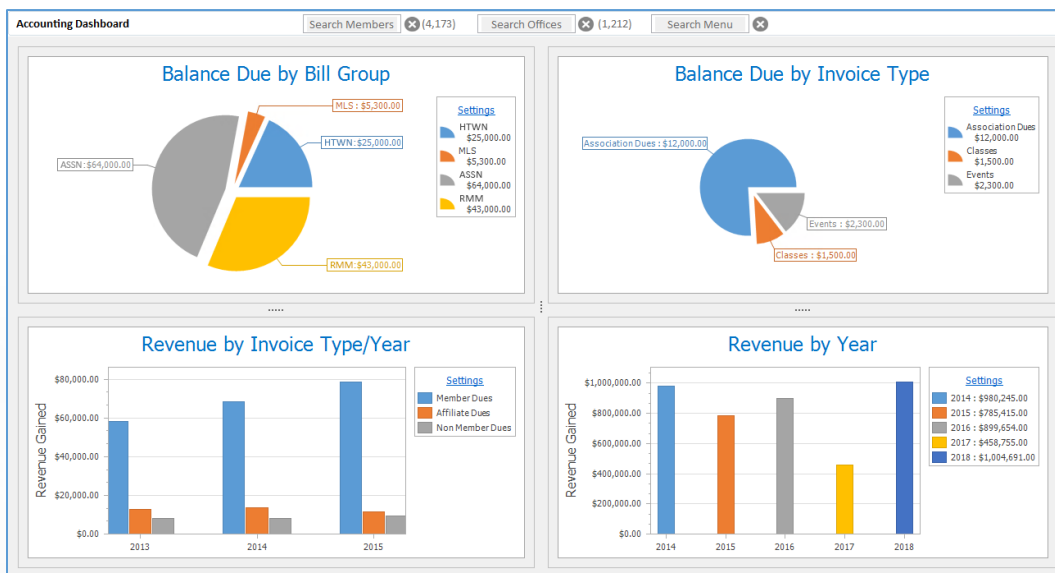
The new **Member Dashboard** includes a series of charts showing membership breakdowns. Clicking the “Settings” link within one of the charts allows you to filter the results to view specific datasets:

- **New Members by Bill Type/Association** (filter by Association)
- **Total Members by Status/Association** (filter by Association)
- **Active Members by Bill Type** (filter by Bill Type)
- **Active Members by Association** (filter by Association)

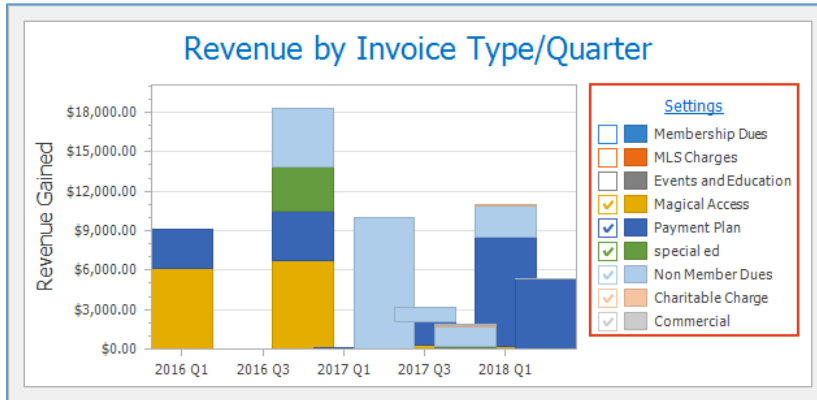


The new **Accounting Dashboard** presents charts showing accounting balances and revenue, with “Settings” options for filtering and refining the results:

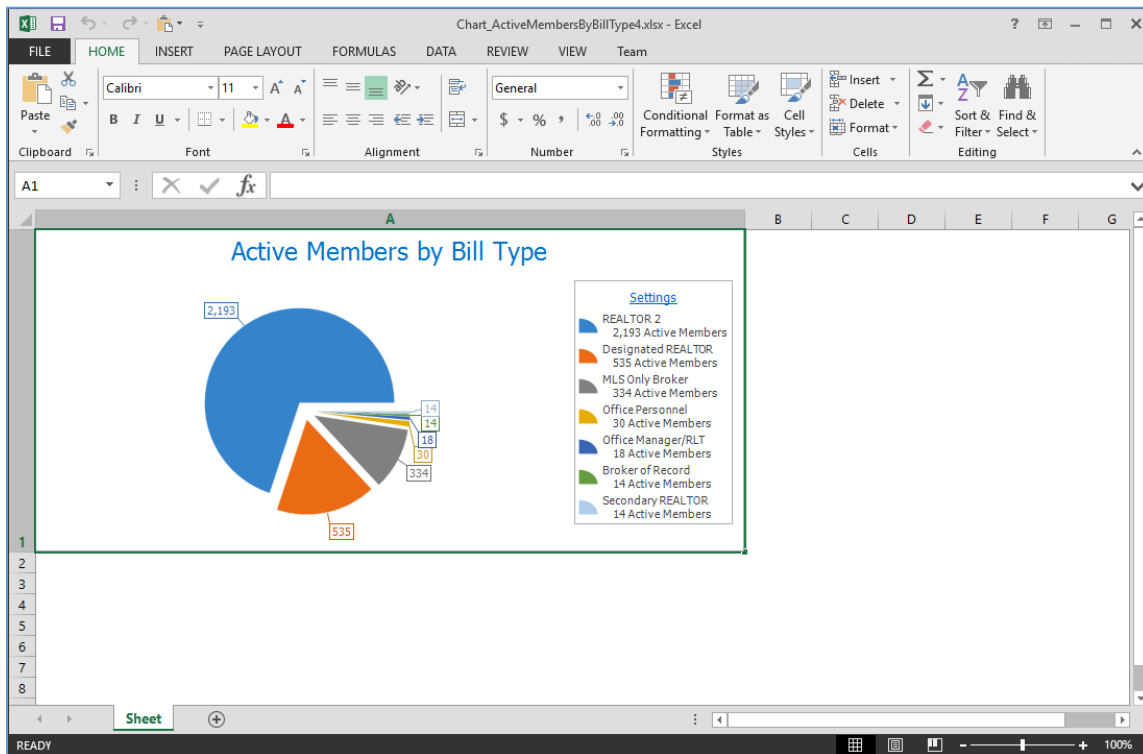
- **Balance Due by Bill Group** (filter by Billing Group)
- **Balance Due by Invoice Type** (filter by Invoice Type)
- **Revenue by Invoice Type/Year** (filter by Date)
- **Total Revenue by Year** (filter by Date)



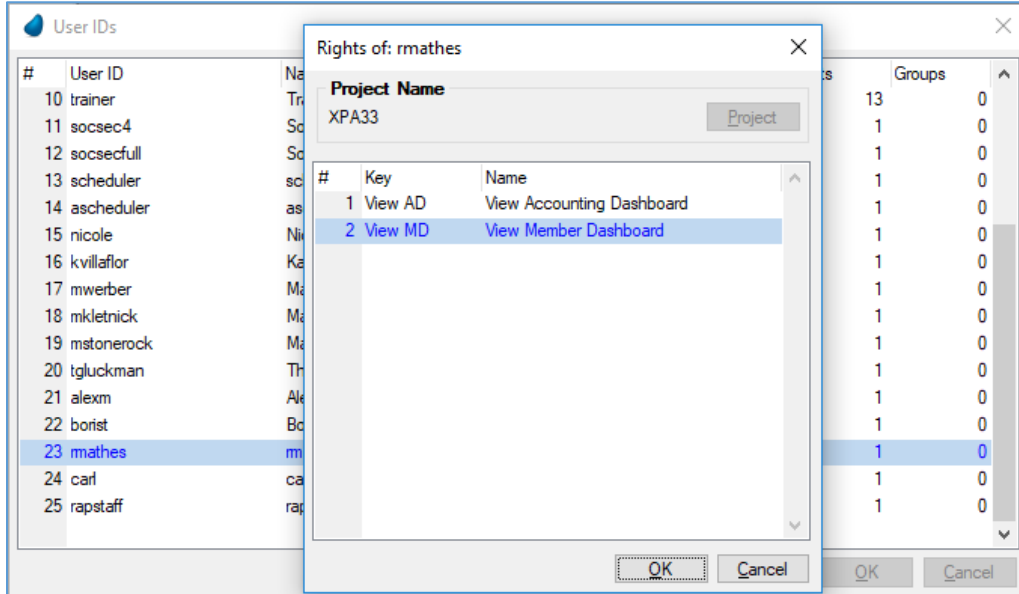
The **Revenue by Invoice Type/Year** and **Total Revenue by Year** charts in the **Accounting Dashboard** can also be toggled between Calendar and Fiscal years, plus they have options for displaying quarterly breakdowns. This allows you to quickly assess which quarters bring in the most revenue for your association.



The new dashboards also make it easy for you to work with your association’s data. Right-clicking on one of the charts will present options to export it into Excel, PDF, or HTML.

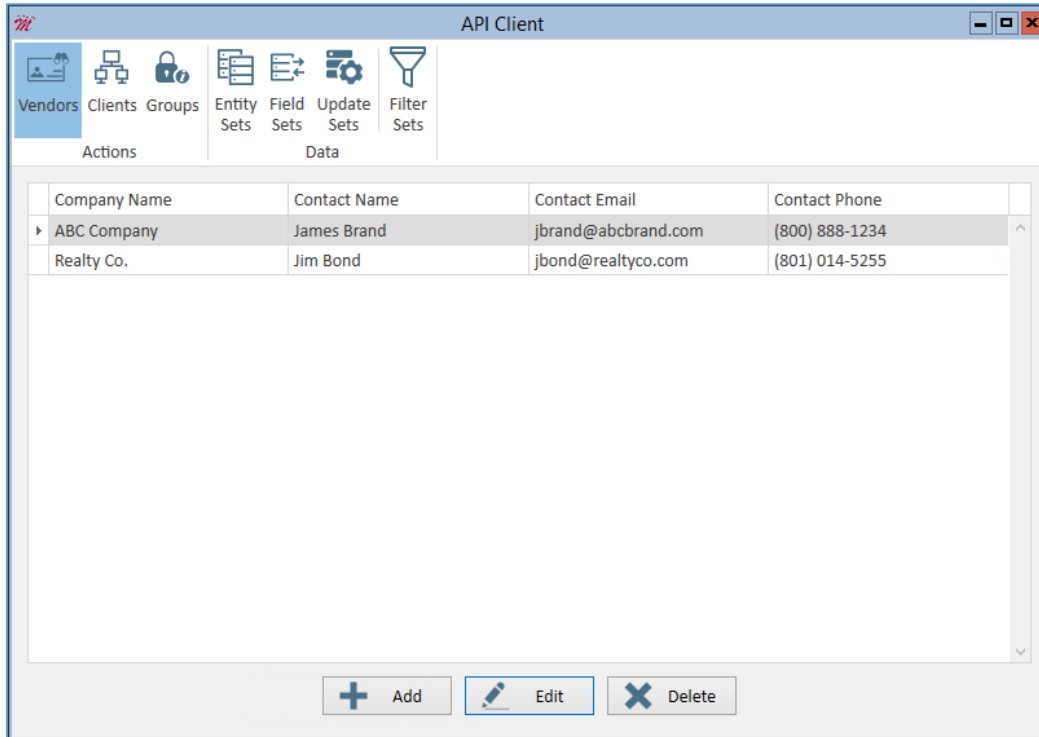


Note that in order for users to access the new dashboards, the System Administrator for your Cloud AMS system will need to set up the corresponding dashboard access rights. The new “View Member Dashboard” and “View Accounting Dashboard” access rights allow System Administrators to manage permission to access each dashboard for individual users.



Cloud AMS Application Programming Interface (API) Updates

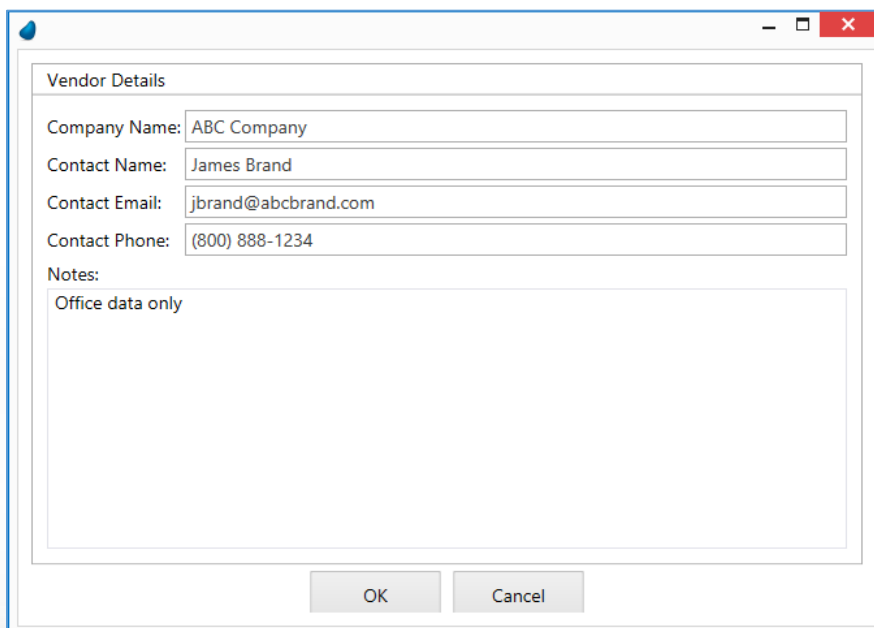
The **API Configuration** feature has been updated with new options for tracking Vendors and their contact information.



The screenshot shows the 'API Client' window with a navigation menu and a table of vendors. The navigation menu includes 'Vendors', 'Clients', 'Groups', 'Entity Sets', 'Field Sets', 'Update Sets', and 'Filter Sets'. The table has columns for 'Company Name', 'Contact Name', 'Contact Email', and 'Contact Phone'. Below the table are 'Add', 'Edit', and 'Delete' buttons.

Company Name	Contact Name	Contact Email	Contact Phone
ABC Company	James Brand	jbrand@abcbrand.com	(800) 888-1234
Realty Co.	Jim Bond	jbond@realtyco.com	(801) 014-5255

Each vendor profile includes a **Company Name**, **Contact Name**, **Contact Email**, and **Contact Phone**, with an additional field for entering **Notes**.

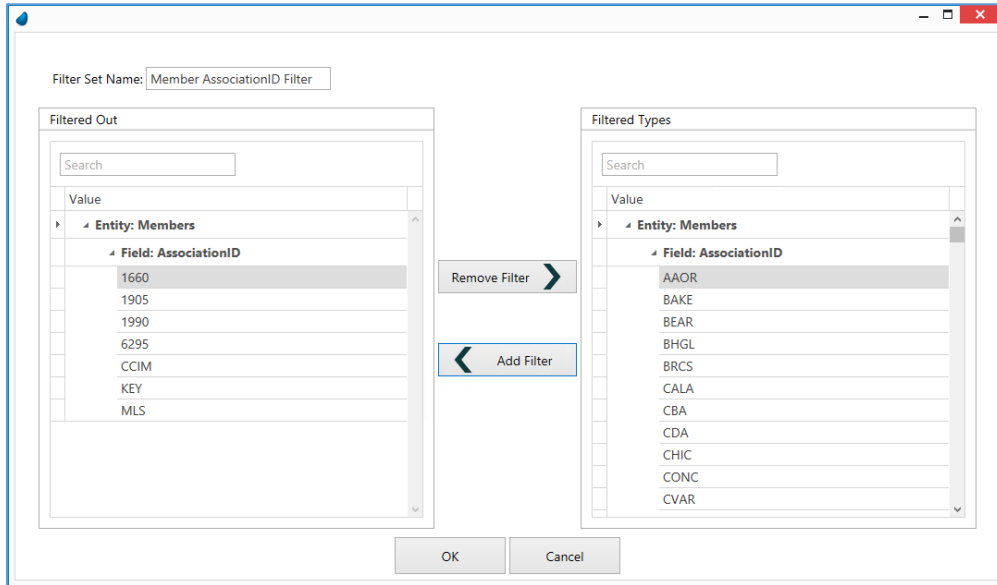


The screenshot shows the 'Vendor Details' form with the following fields:

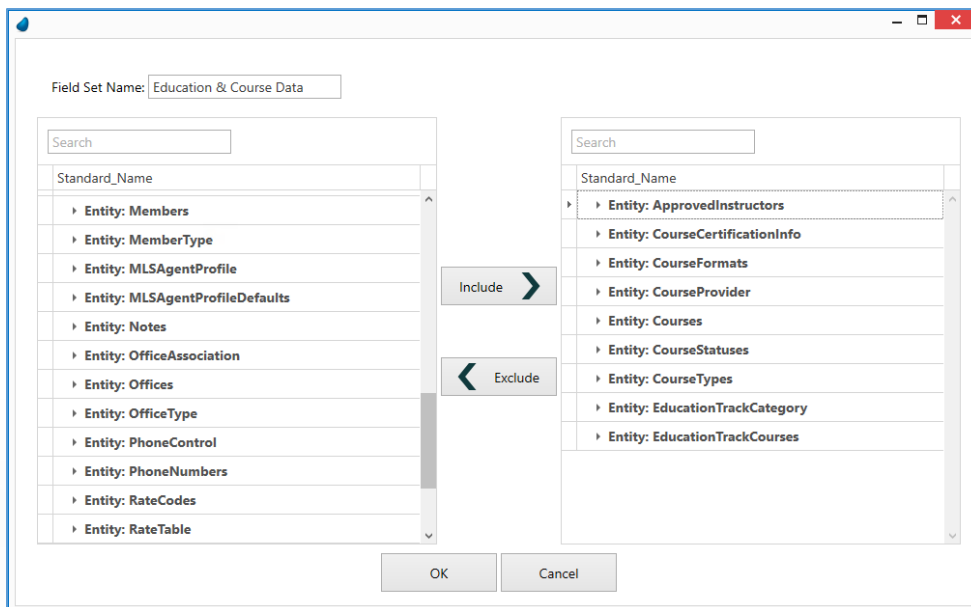
- Company Name: ABC Company
- Contact Name: James Brand
- Contact Email: jbrand@abcbrand.com
- Contact Phone: (800) 888-1234
- Notes: Office data only

Buttons: OK, Cancel

API Configuration also includes new filtering options to allow more granular control over data access. In addition to filtering on selected fields, it's now possible to filter on specific data values within selected fields. For example, filters can be set up to make the Member AssociationID field available while filtering the data to only show selected associations.



Plus, an additional 500 fields from the Education, Events, and Committee resources are now available in the **API Configuration** utility, increasing the number of fields available through the API from 350 to 850.



Additional information on this set of API updates is available on the *Rapattoni Membership API Change Log* website at

https://www.rapattoni.com/rapdocs/support/mls/retsdocs/api_changes_june2018.pdf.

Record Counts Added to Member and Office Query Forms

The following forms have been updated to display total record count in parentheses after the form title:

- Member Query Form
- Member Association Maintenance
- Office Query Form
- Office Association Maintenance

Member Query Form (4,175)				
		Search Members	Search Offices	
		(4,175)	(1,212)	
Last Name	First Name	MI	Member #	MLS ID
Abbbballana	Virgilio	F	20692	123456789123456789
Abbott	Janette	A	10952	RL1234567
Abbott	June		22057	

After filtering on a range in the column headings, the total will update to show how many records remain from the original results set.

Member Query Form (62 of 4,175)				
		Search Members	Search Offices	
		(4,175)	(1,212)	
Last Name	First Name	MI	Member #	MLS ID
Aliotti	Johnny	J	21227	
Ballard	John		273	273
Banga	John		20174	20174

Download CDB Education Tracking for All Members

The **Create Education Tracking** utility has been updated with a new “**NRDS CDB Download**” feature which allows you to download education tracking for all members from the National Association of REALTORS® Central Database (CDB). First, run the **Create Education Tracking** program to create tracking records for members who don't yet have them.

Selection Criteria				
Update Option	1	By Class		
Continuing Ed Type		All Types		
State	CA	California		
Category		All Categories		
Association ID	MCAR	Mon Cty Assoc of REALTORS ®		
Billing Type				
Class ID		All Classes Selected		
Class Date	From	01/01/30	Thru	12/31/29

After creating education tracking, navigate to the “**NRDS CDB Download**” tab and click the “**Update**” button to download all records from the CDB. Note that the “**Start Date**” and “**Category**” fields are populated based on your Cloud AMS system's CDB setup parameters.

This feature will update members with a Pending requirements tracking record created with the utility in the previous tab. Data will be pulled from the NAR CDB based on the Start date and Category selected below.

Start date	<input type="text" value="01/01/01"/>
Category	<input type="text" value="BPP04"/> <input type="text" value="CDB Code of Ethics 2004"/>
Member Records to Process	<input type="text" value="126"/>

Code of Ethics Data Now Included in “Get from CDB” Feature

The **Member CDB Query Form’s Get from CDB** button now pulls **Code of Ethics Completion** data in addition to downloading the selected member record. This data is downloaded from the National Association of REALTORS® Central Database (CDB) based on CDB parameter setup.

Last Name	First Name	MI	Member #	NRDS ID	Office Name	Office #	Update NAR
Alexander	Maria	A	14	180000014	Lockbox & Cooperating Keys	12348	Y
Altieri	Joseph	R	10	180000010	Altieri Real Estate	272	Y
Carney	Susan	J	12	180000012	Tom Redfern & Associates	5070	N
Christensen	Sharon	E	41	180000041	Keller Williams Realty	7608	Y
Compagno	Catherine		84	180000084	Intero Real Estate Salinas	12653	Y
Davi	Anthony	G	94	180000094	Ag Land Ranch & Home Realty	12209	Y
Davi	Cameron	L	59	180000059	Ag Land Ranch & Home Realty	12209	Y
Davi	Sebastian	G	96	180000096	Davi Real Estate & Insurance A	37	Y
De Vaas	Sandusha		24276	180048595	Default Office	99999	Y
Della Sala	Charles	R	105	180000105	Pacific Street Real Estate	95	Y
Dominguez	Deborah	E	49	180000049	Realty World American Dream R	7026	Y
Faia	Thomas	J	21	180000021	A.G. Davi, Ltd.	48	Y
Gavaller	FJ		24294	180099404	Default Office	99999	Y
Glaser	Nicholas	C	17	180000017	Sotheby'S Int'L Rlty Clocktowe	5295	Y

Assoc. ID	Prim Ind.	Status	Status Date	Billing Type	Member Type	Joined Date	Billed Status
MCAR	P	S	03/02/17	R	R	03/14/03	B
KEY	X	T	10/01/07	DR	DR	03/14/03	N
REIL	X	T	01/29/07	DR	DR	03/14/03	N

Education Requirements Tracking from Member Record

Cloud AMS now allows you to add **Education Requirements Tracking** directly from individual member records rather than requiring you to navigate through the Education module. From a member record, simply click “Req. Tracking” in the “Education / Event” section and the Requirements Tracking Form will open.

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	CDB	Help

New "Reference" Field Added to Contributions Form and Exports

A new "Reference" column now displays in the **Contributions Form by Code** feature and may be used for sorting and filtering.

Charge Code	Description	Set #	Category	Description	Billing Year	Contributions	Contributions Total	Pledges
18PC2	2018 RPAC 2	1	10	Annual Membership Dues	2018	18	1,280.00	0
18RPC	2018 RPAC	1	10	Annual Membership Dues	2018	52	2,587.50	0
17PAC	2017 RPAC	1	15	Voluntary Contributions	2017	74	3,745.00	1
17PC2	2017 RPAC	1	15	Voluntary Contributions	2017	23	1,230.00	0
16PAC	2016 RPAC	1	15	Voluntary Contributions	2016	38	3,280.00	2

Member #	Name	NRDS ID	Billing Group	Receipt Date	Source	Charge Code	Amount	Check Date	Pmt Type	Card/Check #	Reference
20573	Alejandro Zaamora		MCAR	02/13/18	EC	18PC2	50.00	00/00/00	V	*****1111	18334445
21685	Maria Adams		MCAR	12/12/17	EC	18PC2	50.00	00/00/00	A	*****0005	18333699
22003	Nicole X. Harris	180018780	MCAR	12/05/17		18PC2	50.00	00/00/00	V	*****1111	18333610
22032	Diane Clem GRI	180018807	MCAR	03/06/18		18PC2	50.00	00/00/00	M	*****5100	18334737
22079	Barbara J. Smith GRI SRES	180018858	MCAR	02/15/18	EC	18PC2	50.00	00/00/00	V	*****1111	18334519
22202	Robert W. Koegle	180099197	MCAR	12/11/17	EC	18PC2	50.00	00/00/00	V	*****1111	18333678
22202	Robert W. Koegle	180099197	MCAR	12/11/17	EC	18PC2	50.00	00/00/00	M	*****4444	18333677
22202	Robert W. Koegle	180099197	MCAR	12/11/17	EC	18PC2	50.00	00/00/00	V	*****1111	18333676
24125	Drigo Smith	180099365	MCAR	12/12/17	EC	18PC2	50.00	00/00/00	M	*****4444	216PNI
24125	Drigo Smith	180099365	MCAR	12/12/17	EC	18PC2	25.00	00/00/00	M	*****4444	18333694
24175	Brian Koegle	24175	MCAR	12/11/17	EC	18PC2	50.00	00/00/00	M	*****4444	18333671
24175	Brian Koegle	24175	MCAR	12/11/17	EC	18PC2	50.00	00/00/00	V	*****1111	18333670
24175	Brian Koegle	24175	MCAR	12/05/17	EC	18PC2	50.00	00/00/00	V	*****1111	18333611
24176	Mike Koegle	24176	MCAR	12/11/17	EC	18PC2	50.00	00/00/00	A	*****0005	18333691
24176	Mike Koegle	24176	MCAR	12/11/17	EC	18PC2	50.00	00/00/00	A	*****0005	18333690
24220	Candice Santos GRI	000024272	MCAR	12/11/17	EC	18PC2	50.00	00/00/00	V	*****1111	18333675

A corresponding "Reference Number" field is also available in the form's **Export** list.

Cloud AMS Export Manager

Saved Exports - Contributions

Select Export to Load: Load Manage

#	Available Fields (82)	#	Selected Fields (4)
1	Billing Group	1	Receipt Date
3	Source	2	Charge Code
6	Previous NRDS Date	3	Reference Number
7	Payment Number	4	Line Amount
9	Receipt Number		
10	Charge Code		
11	Charge Code Description		
12	Set Number		
13	Category		
14	Taxable		
15	Billing Year		
16	Payment Type		
17	Payment Type Description		
18	Member Number		
19	Last Name		
20	First Name		
21	Middle Initial		
22	Full Name		
23	Nickname		
24	Generation		
25	IMS Login		
26	Member NRDS ID		

Export Options

File Name: C:\Users\MKLETN~1\AppData\Local\Temp\32\Contributions_06212018_1139.csv

Export Option: Include Field Headers

Save Export as: Public Save Cancel Export

Credit Card Expiration Form Updated with “Auto Pay” and “Entered By” Columns

The **Credit Card Expiration Form** has been updated with new **“Auto Pay”** and **“Entered By”** columns. The **“Auto Pay”** column shows whether Auto Pay is enabled for the corresponding record, and the **“Entered By”** column shows the Staff User ID which entered the credit card or **“IMS”** for cards entered via Internet Member Services (IMS).

Last Name	First Name	Member #	Payment Type	Credit Card #	Exp Date	Sort Sequence	Invoice Type	Auto Pay	Entered By
Barker	Carol	22054	V Visa	*****1111	12/22			<input checked="" type="checkbox"/>	mwerber
Santos	Candice	24220	M Master Card	*****4444	01/23			<input type="checkbox"/>	IMS
Abraham	James	6252	V Visa	*****1111	03/23			<input type="checkbox"/>	IMS
Abbott	June	22057	M Master Card	*****1111	03/23	C	M	<input checked="" type="checkbox"/>	IMS
Koegle	Brian	24175	V Visa	*****1111	03/23			<input type="checkbox"/>	IMS
Koegle	Mike	24176	M Master Card	*****4444	03/23			<input type="checkbox"/>	IMS
Biggs	Blaire	24273	M Master Card	*****4444	03/23			<input type="checkbox"/>	IMS
Koegle	Kathleen	22206	V Visa	*****1111	04/23	A	M	<input checked="" type="checkbox"/>	IMS
Smith	Drigo	24125	M Master Card	*****4444	04/23	A	D	<input checked="" type="checkbox"/>	IMS
Koegle	Michelle	22117	V Visa	*****1111	07/23	A	D	<input checked="" type="checkbox"/>	IMS
Abbballana	Virgilio	20692	A American Express	*****0051	09/23			<input checked="" type="checkbox"/>	KKoegle
Zaamora Cloud QA 2.01	Alejandro	20573	D Discover	*****1117	12/23	A	M	<input checked="" type="checkbox"/>	pdelta
Hinckley	Ryan	21420	V Visa	*****1111	02/24			<input type="checkbox"/>	IMS
Acoba	Maybellineaj	11688	V Visa	*****1111	04/24	A	D	<input checked="" type="checkbox"/>	KKoegle
Koegle	Courtney	24177	V Visa	*****1111	08/24			<input type="checkbox"/>	IMS
Acoba	Maybellineaj	11688	M Master Card	*****4444	09/24	A	D	<input checked="" type="checkbox"/>	KKoegle
Macchio	Mary	24233	M Master Card	*****4444	09/24	A	D	<input checked="" type="checkbox"/>	KKoegle
Cryder	Charlie	2590	A American Express	*****0005	12/24	A	D	<input checked="" type="checkbox"/>	julle
De Vaas	Hirusha	24277	V Visa	*****1111	01/25			<input type="checkbox"/>	IMS
Koegle	Kathleen	22206	M Master Card	*****4444	05/25	A	M	<input checked="" type="checkbox"/>	IMS
Aldren	Jennifer	24286	M Master Card	*****4444	07/25	A	M	<input checked="" type="checkbox"/>	IMS
Gavaller	FJ	24294	V Visa	*****1111	08/25		D	<input checked="" type="checkbox"/>	sdevaas
Koegle	Kathleen	22206	M Master Card	*****4444	01/26			<input type="checkbox"/>	IMS
Biggs	Blaire	24273	V Visa	*****1111	02/26			<input type="checkbox"/>	IMS
Koegle	Kathleen	22206	M Master Card	*****4444	09/26	A	D	<input checked="" type="checkbox"/>	KKoegle
Barker	Emma	24254	M Master Card	*****4444	09/26	A	D	<input checked="" type="checkbox"/>	KKoegle
Koegle	Kathleen	22206	V Visa	*****1111	01/29	B	D	<input checked="" type="checkbox"/>	KKoegle
Smith	Drigo	24125	V Visa	*****1111	05/29	A	M	<input checked="" type="checkbox"/>	KKoegle
Macchio	Joe	24232	V Visa	*****1111	09/29	A	D	<input checked="" type="checkbox"/>	KKoegle

The new **“Auto Pay”** and **“Entered By”** fields are also available via the form’s **Export** feature.

Auto Pay Option Added to Credit Cards Tab on Member Forms

The **“Auto Pay”** check box option now displays under the **“Credit Cards”** tab on the **Member Query Form** and **Member Information Form**, allowing staff to view **Auto Pay** settings directly from the member record.

#	Card Type	Credit Card #	CID	Expires	Auto Pay	Invoice Type	Sort Seq.	Status	Entered By
2	M Master Card	*****4444		09/26	<input checked="" type="checkbox"/>	D Membership Dues	A	A	KKoegle 03/29/18
6	V Visa	*****1111		01/29	<input checked="" type="checkbox"/>	D Membership Dues	B	A	KKoegle 04/02/18
8	V Visa	*****1111	456	04/23	<input checked="" type="checkbox"/>	M MLS Charges	A	A	IMS 06/28/18
9	M Master Card	*****4444		05/25	<input checked="" type="checkbox"/>	M MLS Charges	A	A	IMS 06/28/18

As part of this change, the **“Sort Seq.”** column has been moved to after the **“Invoice Type”** column to make room for the **“Auto Pay”** setting.

Rapattoni *Magic*-Cloud AMS Maintenance Report

2.2

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 2.2.

Membership

When adding an office or member, the cursor now lands in the ZIP Code field instead of the City field. After entering a ZIP Code, the City and State are automatically populated. (RNI 180308-000207)

Accounting

Overpayment postings initiated from the Sales Invoice Form were previously creating credit invoices with missing Invoice Type, Charge Code, and Description info. This issue has been fixed so that these fields are stored as intended. (RNI 180417-000079)

On the Post Payment Form, when a Batch had "C.C. Verifying Options" set to the "None" option, the "Post" button was inoperable and the "Cancel" button would complete the transaction and create a receipt. These issues have been corrected so that the "Post" and "Cancel" buttons both work as intended when the "None" option is selected. (RNI 180614-000071)

The Batch Form previously included a "Batch" option under "Credit Card Verifying Options" which would trigger errors when it was inadvertently selected. This "Batch" option has been removed. (RNI 180509-000094)

When navigating to the Cash Receipts Posting Form via Office A/R, the system was auto-populating the Incurring Member from the last invoice posted instead of defaulting to the RM or OM based on Cloud AMS Preferences and Defaults setup. This has been fixed so that it defaults to the RM or OM as intended. (RNI 180611-000108)

Education

The Education Transcript report has been updated to sort by Completion Date. (RNI 180628-000140)

Convention

When adding Convention Exhibitors, the office was automatically being placed in the “W” (Wait List) status. This has been fixed so that offices default to the “R” (Registered) status as intended. (RNI 180710-000069)

Internet Member Services (IMS)

IMS previously allowed users to save expired credit cards when a credit card deposit was required for class registration. This issue has been corrected so that expired credit cards trigger an error and cannot be saved. (RNI 180628-000044)

The “Credit Card Type” drop-down in IMS previously included a blank option which allowed users to save credit cards with no type value. The blank option has been removed so that a valid Credit Card Type must be selected. (RNI 180619-000181 & RNI 180607-000151)

Online convention registration was triggering an error for sponsorships that cost over \$1000. This has been resolved and registrations that cost over \$1000 are now successfully completed without errors. (RNI 180315-000107)

IMS was previously failing to process credit cards properly when users made payments on payment plan invoices. This issue has been resolved and payment plans are now working properly for IMS payments. (RNI 180618-000090)

In some instances, IMS would show duplicate entries in the “Credit Cards on file” drop-down menu following declined payment attempts. This has been fixed and the duplicate credit card entries have been eliminated. (RNI 180510-000166)

Credit Cards entered in IMS with “Keep On File” set to “No” would continue to be available under “Credit Cards on file” at times. In addition, after adding multiple credit cards in IMS, the “Credit Cards on file” drop-down would be frozen on a single card and the user would be unable to change the selection. These issues have been fixed. (RNI 180612-000295 & RNI 180627-000160)

In rare instances, stored credit cards would be available in IMS but not in Cloud AMS when “Keep On File” was set to “Yes” and “Allow Auto Payment” was set to the “No” option. Validation logic has been added to prevent this invalid combination of options, ensuring that “Keep On File” is always enabled when “Allow Auto Payment” is enabled. If “Allow Auto Payment” is disabled, “Keep On File” may be enabled or disabled at the user’s discretion. (180604-000111)

