

Release Highlights 2.2.04

Rapattoni Magic-Cloud AMS 2.2.04 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 2.2.04:

- Expanded Options for Credit Card Management in AMS and IMS
- 'Association ID' and 'Primary Indicator' Added to Phone Query Form
- Dues History Form Updates
- New Calendar Control for Date Selection

Expanded Options for Credit Card Management in AMS and IMS

Cloud AMS now allows association staff to update Auto Payment options for credit cards that were entered in Internet Member Services (IMS) by association members. In the past, it was only possible for staff to modify these Auto Payment options for credit cards that were entered directly in AMS.

Member Credit Card Info

Member: 22057 June Abbott

Payment Info

Status: Active Pending Inactive

Card Type: M Master Card

Credit Card Number: [Redacted]

Expires: [Redacted]

CID: [Redacted]

Credit Card Billing Address

Name on Card: June Abbott

Address: [Redacted]

City, State, Zip: [Redacted]

Billing

Allow Auto Payment

Invoice Type: M MLS Charges

Sort Sequence: C

Member's IMS Selections

Default Card

Save Delete Cancel

In addition, association members can now view all of their stored credit cards in IMS, including cards entered by staff in Cloud AMS that were previously unavailable in IMS. Note that with this change, it is now possible for members to modify or delete credit cards that were entered by association staff on their behalf.

'Association ID' and 'Primary Indicator' Added to Phone Query Form

The **Phone Query Form** has been updated to include the **Association ID** and **Primary Indicator** fields, allowing users to filter and export records using these fields.

Phone Type	Allow Text	Opt Out	Area Code	Phone #	Ext.	On Roster	Member #	Last Name	First Name	Status	Primary Indicator	Association ID
Cellular	Y	N	180	555-1234	0	Y	1	Aiello	Bert	A	P	123456
Travel	N		180	555-1234	0	Y	3	Aiello	Bert	A	P	123456
Cellular	Y	N	180	555-1234	0	Y	4	Cash	Noel	S	P	123456
Cellular	Y	N	180	555-1234	0	Y	10	Altieri	Joseph	S	P	123456
Cellular	Y	N	180	555-1234	0	Y	12	Carney	Susan	S	P	123456
Cellular	Y	N	180	555-1234	0	Y	14	Alexander	Maria	A	P	123456
Cellular	Y	N	180	555-1234	0	Y	17	Glaser	Nicholas	S	P	123456
Doghouse	N		180	555-1234	0	Y	17	Glaser	Nicholas	S	P	123456
Cellular	Y	N	180	555-1234	0	Y	19	Ringer	Merritt	S	P	123456
Doghouse	N		180	555-1234	0	Y	19	Ringer	Merritt	S	P	123456
Cellular	Y	N	180	555-1234	0	Y	21	Fala	Thomas	S	P	123456
Doghouse	N		180	555-1234	0	Y	21	Fala	Thomas	S	P	123456
Cellular	Y	N	180	555-1234	0	Y	37	Salmonsens	Peter	X	P	123456
Doghouse	N		180	555-1234	0	Y	37	Salmonsens	Peter	X	P	123456
Cellular	Y	N	180	555-1234	0	Y	38	Sturvist	Gerald	I	P	123456
Cellular	Y	N	180	555-1234	0	Y	40	Christenson	Paula	T	P	123456
Cellular	Y	N	180	555-1234	0	Y	41	Christensen	Sharon	S	P	123456
Cellular	Y	N	180	555-1234	0	Y	42	Acceveday	James	T	P	123456
Doghouse	N		180	555-1234	0	N	42	Acceveday	James	T	P	123456
Cellular	Y	N	180	555-1234	0	Y	48	Bratty	Robert	A	P	123456
Doghouse	N		180	555-1234	0	Y	48	Bratty	Robert	A	P	123456

The **Association ID** and **Primary Indicator** fields are now available in the **Phone Query Form's** export field list.

Cloud AMS Export Manager

Saved Exports - Phones Query Form - Member

Select Export to Load: [Dropdown] [Load] [Manage]

#	Available Fields (77)	#	Selected Fields (2)
1	Phone Type	1	Primary Indicator
2	Allow Text	2	Association ID
3	Opt Out Text		
4	Area Code		
5	Phone Number		
6	Phone Extension		
7	On Roster		
8	Member Number		
9	Status		
12	Last Name		
13	First Name		
14	Middle Initial		
15	Full Name		
16	Nickname		
17	Generation		
18	IMS Login		
19	Member NRDS ID		
20	Member MLS ID		
21	Member Alternate ID		
22	License Number		
23	License Type		
24	License Type Description		

Export Options

File Name: C:\Users\MKLETN*1\AppData\Local\Temp\72\PhonesQueryForm-Member_12122018_1152.csv

Export Option: View Results Include Field Headers

Save Export as: [Text] Public [Save] [Cancel] [Export]

Dues History Form Updates

The **Dues History Form** now includes the **Dues Split** field for range criteria and exports.

Charge Code	Description	Set #	Category	Description	Billing Year	Count	Total Amount
18STA	2018 State Dues	1	10	Annual Membership Dues	2018	157	15,910.00
19LOC	2019 Local Association Dues	1	10	Annual Membership Dues	2019	1	130.00
19NAT	2019 National Dues	1	10	Annual Membership Dues	2019	1	155.00
19STA	2019 State Dues	1	10	Annual Membership Dues	2019	1	120.00
1INSB	First Installment Billing	1	10	Annual Membership Dues	2011	50	4,800.00
1LNI	1st Local Installment Billing	1	10	Annual Membership Dues	2011	0	0.00
1ST	1st install test	1	10	Annual Membership Dues	2017	12	600.00

Member #	Name	NRDS ID	Billing Group	Status	Invoice #	Receipt #	Receipt Date	Dues Split	Batch ID	Amount	Payment Type	Card/Check #
2590	Charlie C. Cryder CDRS E-PRO 12345			A	1099137	57534	03/09/18	Y	A00266	120.00	M	*****5100
2590	Charlie C. Cryder CDRS E-PRO 12345			A	1099050	57517	03/08/18	Y	MARNA	120.00	V	*****1111
2590	Charlie C. Cryder CDRS E-PRO 12345			A	1098902	57515	03/08/18	Y	MARPA	120.00	M	*****5100
2590	Charlie C. Cryder CDRS E-PRO 12345			A	1098902	57515	03/08/18	Y	MARPA	120.00	M	*****5100
2590	Charlie C. Cryder CDRS E-PRO 12345			A	1099294	57440	02/22/18	Y	A00260	120.00	M	*****5100
2590	Charlie C. Cryder CDRS E-PRO 12345			A	1098906	57234	02/07/18	Y	MERCF	120.00	V	*****1111
2590	Charlie C. Cryder CDRS E-PRO 12345			A	1099290	57121	01/19/18	Y	A00249	120.00	M	*****5100
2590	Charlie C. Cryder CDRS E-PRO 12345			A	1099290	57121	01/19/18	Y	A00249	120.00	M	*****5100
2590	Charlie C. Cryder CDRS E-PRO 12345			A	1098730	56971	11/30/17	Y	A00235	120.00	V	*****1111
6252	James Y. Abraham GRI			A	1098803	57607	04/04/18	Y	APR18	120.00	V	*****1111
10952	Janette A. Abbott LOL			A	1099413	55948	07/26/17	Y	UL17	0.00	V	*****1111
10952	Janette A. Abbott LOL			A	1099255	55948	07/26/17	Y	UL17	0.00	V	*****1111
10952	Janette A. Abbott LOL			A	1099024	55948	07/26/17	Y	UL17	0.00	V	*****1111
11688	Maybelline J. Acoba			A	1099338	56997	12/07/17	Y	DEC17	120.00	V	*****1111
20573	Alejandro Zaamora CloudSTG CCIMOFF			A	5071972	57268	02/11/18	Y	EBNAR	110.00	V	*****1111
20573	Alejandro Zaamora CloudSTG CCIMOFF			A	1098748	56872	11/14/17	Y	A00227	120.00	M	*****4444
20692	Virgilio F. Abbbballana			A	1099367	55970	07/27/17	Y	NRDSK	0.00	M	*****4444
20692	Virgilio F. Abbbballana			A	1099209	55970	07/27/17	Y	NRDSK	0.00	M	*****4444
20692	Virgilio F. Abbbballana			A	1098978	55970	07/27/17	Y	NRDSK	0.00	M	*****4444
22003	Nicole Z. Harris CRB ROFL GRI			A	1098720	56446	09/21/17	Y	SEPTKK	0.00	V	*****1111
22032	Diane Clem GRI			A	5072204	57488	03/06/18	Y	MARNA	100.00	M	*****5100

In addition to the **Dues Split** field, the **Payment Ref.** field (i.e., **EC Control Number** for payments approved by N.A.R.) is also now available in the **Dues History Form's** export field list.

Cloud AMS Export Manager

Saved Exports - Dues

Select Export to Load: [Dropdown] [Load] [Manage]

#	Available Fields (85)	#	Selected Fields (2)
1	Billing Group	1	Dues Split
2	Status	2	Payment Ref.
3	Invoice Number		
4	Receipt Number		
5	Receipt Date		
7	Batch ID		
8	Line Amount		
9	Payment Number		
11	Charge Code		
12	Charge Code Description		
13	Set Number		
14	Category		
15	Taxable		
16	Billing Year		
17	Payment Type		
18	Payment Type Description		
19	Member Number		
20	Last Name		
21	First Name		
22	Middle Initial		
23	Full Name		
24	Nickname		

Export Options

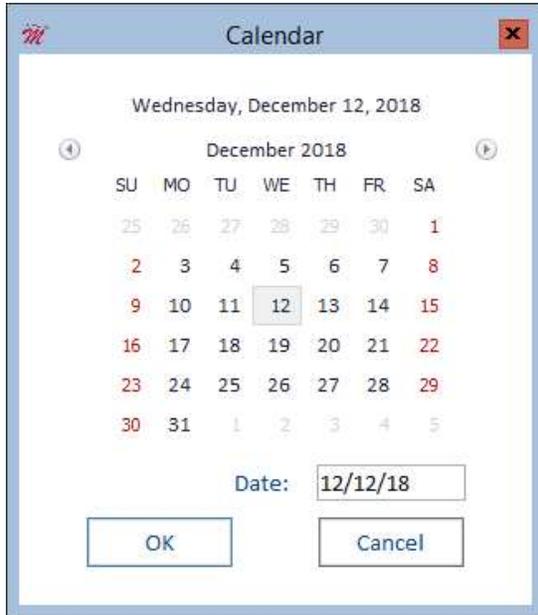
File Name: C:\Users\MKLETN~1\AppData\Local\Temp\72\Dues_12122018_1116.csv

Export Option: [View Results] Include Field Headers

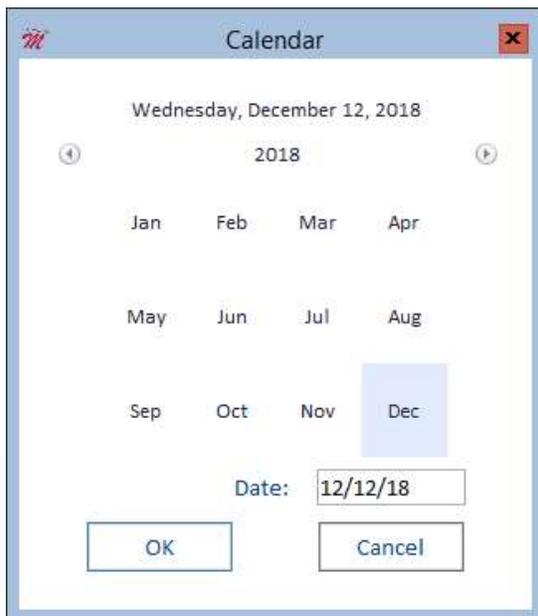
Save Export as: [Text Box] Public [Save] [Cancel] [Export]

New Calendar Control for Date Selection

When selecting dates in Cloud AMS, the system now uses a new **Calendar** control featuring a more modern design.



You can click the Month/Year near the top of the calendar to zoom out and quickly navigate through months and years.



Rapattoni *Magic-Cloud* AMS Maintenance Report

2.2.04

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 2.2.04.

Membership

The 'Office Name' column was not sorting properly on the Office Association Maintenance Form. This has been corrected so that the column sorts alphabetically as intended. (RNI 180813-000127)

When running a Billing Type Printout, the system was bypassing the print options and preview to send the report directly to the default printer, and the left side of the report was being cut off. These issues have been resolved so that content is no longer cut off and the report now leverages its Print Setup options properly, allowing user to select a printer, output to PDF, or adjust other options as needed. (RNI 181121-000017)

Accounting

The Auto Apply Credits Utility was sending its report directly to the default printer even when the "Print To" option was set to PDF or the report was set to be converted to Excel or other formats. This has been fixed so that the report leverages Print Setup options as intended, opening as PDFs, Excel spreadsheets, and other formats as intended. (RNI 180817-000070)

In some instances, members who qualified for credit card auto-pay were not being processed due to an issue with their database records. This issue has been corrected and the underlying data has been repaired to ensure that all qualifying members are included in credit card auto-pay. (RNI 181127-000049 & 181031-000087)

The Member Credit Card Info form previously allowed users to leave "Allow Auto Payment" enabled when deleting the required Invoice Type and/or Sort Sequence values. The form's validation has been corrected so that the "Allow Auto Payment" option must be disabled before deleting Invoice Type or Sort Sequence. (RNI 181127-000048)

On the Credit Card Expiration Form, the system was erroneously allowing users to modify Auto Pay, Invoice Type, and Sort Sequence values that were intended to be unmodifiable on this form. This issue has been resolved so that Expiration Date is the only field that can be modified on the Credit Card Expiration Form. (RNI 181205-000052)

Entering a credit card on the Member Credit Card Info form was setting Expiration Date to the first day of the specified month, while the credit card entry feature in Internet Member Services (IMS) would set Expiration Date to the last day of the month. This has been fixed in Cloud AMS so that the Member Credit Card Info form sets Expiration Date to the last day of the month, matching the logic in IMS as well as standard industry practices. (RNI 181128-000115)

Due to a change in the Group Detail Report files provided by NRDS, the NRDS Settlement Import utility was presenting a file format error message for valid import files. This has been fixed and files adhering to the updated NRDS format can now be imported without triggering errors. (RNI 181205-000014)

In some instances, the Sales Invoice Form was not showing the sixth line of text from the Default Invoice Message on the Sales Invoice Setup Form. This issue has been resolved so that all six lines of text display as intended. (RNI 180508-000125)

Education

On the Class Information Form, the Range and Locate lookups for the 'Class ID' column were showing 'Event ID' as the field name. They now show 'Class ID' as the field name to match the column heading. (RNI 180521-000159)

The instructional text on the Recalculate Education Card Counts/Credits Utility was previously being cut off. This has been fixed so that the text displays in its entirety. (RNI 181204-000128)

Inventory

The Inventory Adjustment Report was cutting off the last character in longer Charge Code values. This has been resolved and Charge Codes now display in their entirety. (RNI 140918-000121)

