



Release Highlights 2.4.10

Rapattoni *Magic*-Cloud AMS 2.4.10 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 2.4.10:

- NEW! Member Tracking Program!
- Added License Type to the License Update Utility

NEW! Member Tracking Program!

We are thrilled to announce a new program designed to make your interactions with your agents more productive and comprehensive! The newly designed Member Tracking Program was born out of our customers' need to track all aspects of agent interaction when calling into the association for assistance. This program took the basics from the existing Call Tracking program and added much more functionality.

Here are some key features:

- Enhanced ticket details with a snapshot of the agent and office information, including associations, email, addresses, phone numbers, and more!
- Categories and sub categories can be assigned to better define the specific nature of the interaction.
- A customizable knowledge base for frequently requested assistance. Knowledge base articles will appear at the bottom of the ticket when sub category is selected and can be copied and emailed to the agent.
- Create "Quick Tickets" based on frequently asked topics.
- Ticket Information Form is color-coded to denote urgency for follow up.
- Built in filter that allows you to filter the ticket information form by date or by urgency.
- Gradient color denotes high urgency matters to make them clearly visible.
- Quickly Export data directly to Excel.

System Actions Quick Access Ticket Tracking Help Favorites

Create Modify Refresh Data Accounting Membership Education Event IMS Export To Excel High Medium Low From Date: Thru Date: Search

Filter entries by date

Actions Create Ticket by Category Export Filter By Urgency Filter By Date

Managers Ticket Information Form (Beta) Members (4,226) Search Offices (1,219) Search Menu

Managers Internet Member Services Inventory Convention Professional Standards Government Affairs Membership Tracking System Ticket Information Form (Beta) Knowledge Base (Beta) Call Information Form (Legacy) Call Report (Legacy) Purge Call Tracking Utility (Legacy) System Setup Utilities Preferences and Defaults Accounting Setup User Maintenance NRDS Implementation Utilities Rapattoni MLS Setup Workstation Test Custom Programs Mail List Certification

Create Quick Tickets based on frequently used categories Export data to Excel Filter by Urgency

Enter text to search... Find

ID	Member / Office #	Category	Sub Category	Subject	Contact Source	Assigned To	Start Date	End Date	Status	Urgency
2	21986	Accounting	Staff Payment via ePay	Diane - please call them back asap!	Phone Call	Tyler Marshall	11/13/2020	11/13/2020	Closed	Low
35	21986	Accounting	Dues Payment	Change of member email	Phone Call	Tyler Marshall	11/10/2020	11/13/2020	Closed	Low
42	20344	Accounting	Dues Payment	Payment Plan options	Walk in	Irene Young	11/10/2020	11/13/2020	Pending	Low
41	21227	Membership	New Membership	Late Fee Waiver	Phone Call	Yadira Magana	11/10/2020	11/13/2020	Pending	Low
16	11178	IMS	General Questions	Do we have a link for board rules?	Phone Call	Diane Clem	11/10/2020	11/13/2020	Pending	Low
40	24111	Accounting	General Questions	Late Fee	Phone Call	Irene Young	10/30/2020	11/13/2020	Closed	Low
39	24111	Membership	General Questions	Dispute	Phone Call	Tyler Marshall	10/30/2020	11/13/2020	Pending	Medium
38	42	Accounting	General Questions	Questions about his AR bill	Email	Nicole Alaoui	10/30/2020	11/13/2020	Closed	Low
37	42	Education	Registration Questions	Called in for directions to a class he was taking	Phone Call	Tyler Marshall	10/30/2020	11/13/2020	Closed	Low
36	22003	Event	Cancellations	Nicole called in to cancel the event she was signed up for	Phone Call	Yadira Magana	10/30/2020	11/13/2020	Closed	Low
35	24111	Accounting	Dues Payment	Called in to pay his AR payment	Phone Call	Diane Clem	10/30/2020	11/13/2020	Closed	Low
34	24111	IMS	General Questions	Tyler called in to report an issue with IMS	Walk in	Nicole Alaoui	10/29/2020	11/13/2020	Pending	High
33	12252	IMS	General Questions	Modified the subject	Email	Tyler Marshall	10/29/2020	11/13/2020	Pending	Low

Expand the Membership Tracking System menu to view the new Member Tracking and the existing Call Tracking forms

Column showing level of urgency

Gradient color for high urgency items

Ticket Details Member Details Office Details

Ticket#: 2 Staff: rmathes 10/27/2020 6:42:02 PM

Subject: Diane - please call them back asap!

Urgency: Low Status: Closed

Category: Accounting Sub Category: Staff Payment via ePay

Contact Source: Phone Call

Caller information

Member Name: Erin Arnold Member #: 21986

Phone: 831-656-9125 Record Type: M

Click here to open the Managers forms to select the Membership Tracking System

NOTE: FOR THOSE CUSTOMERS THAT CURRENTLY USE CALL TRACKING, YOUR HISTORY WILL REMAIN IN THE CALL TRACKING INFORMATION FORM AND CAN BE ACCESSED FROM THE LEFT SIDE MENU AS SHOWN ABOVE.

In addition, the new Member Tracking Program has replaced the Call Tracking button on the ribbon bar in the Member Information Form, see below:

Member Information Form

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 Member Tracking CDB Help

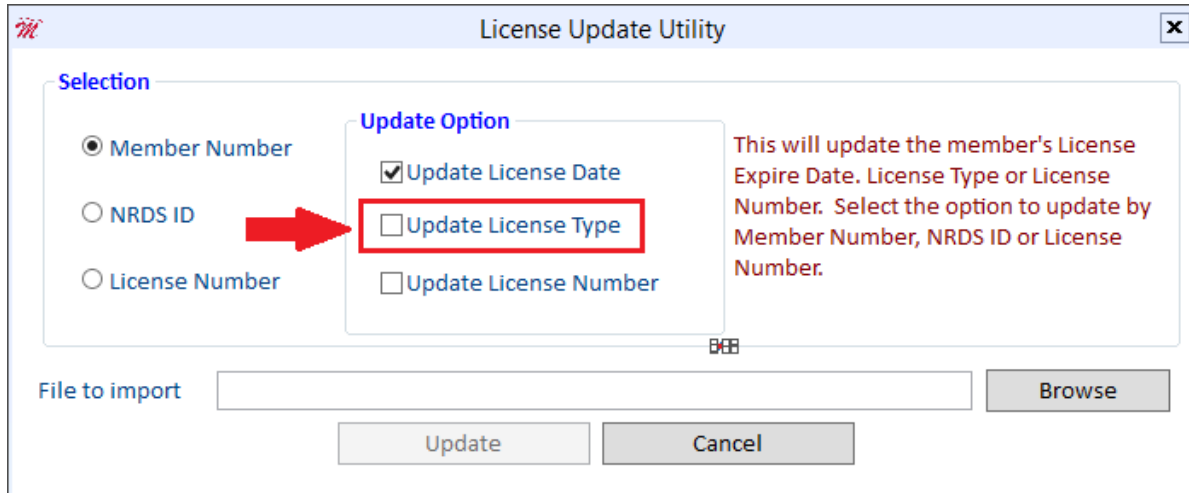
Member # 10952 Ms. Jane Andrew X Abbott Occupation BOR Broker of Record - N Transfer Date 10/10/17

Office # 7646 Salinger Properties License Type S Salespersons License

We will be updating our Rapattoni *Magic-Cloud* AMS Online Learning Center with a new short video on this new program. Stay tuned!

Added License Type to the License Update Utility

We've enhanced the License Update Utility to include License Type. This enables you to update the License Type in addition to the expiration date, based on the information from your data file.



The screenshot shows a window titled "License Update Utility" with a close button in the top right corner. The window is divided into several sections:

- Selection:** Three radio buttons are listed: "Member Number" (selected), "NRDS ID", and "License Number". A red arrow points from "NRDS ID" to the "Update License Type" checkbox.
- Update Option:** A sub-section containing three checkboxes: "Update License Date" (checked), "Update License Type" (highlighted with a red box), and "Update License Number".
- Help Text:** A text box on the right states: "This will update the member's License Expire Date. License Type or License Number. Select the option to update by Member Number, NRDS ID or License Number."
- File to import:** A text input field with a "Browse" button to its right.
- Buttons:** "Update" and "Cancel" buttons at the bottom.

As always, should you have any questions on these programs or any programs or processes in Rapattoni *Magic-Cloud* AMS, please don't hesitate to reach out to our support team at 1-866-730-7115 or email to support@rapattoni.com

Rapattoni *Magic*-Cloud AMS Maintenance Report

2.4.10

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 2.4.10.

Membership

- **Numerous UI Changes.** Improved overall font size consistency and eliminated overlapping ribbon bar buttons. Added two new Themes, “Basic” and “The Bezier” for customizing your Cloud AMS experience.
- **Contribution Merge Update.** Added a “Please Wait” message when Cloud AMS is creating a file. Prior to the change, there was no indication the system was running the merge.
- **Updated the NRDS Verification Report Program.** Removed the need to add file name in addition to directory path. Now you simply click the “browse” button to access your file.

Member Portal

- **Update to Member Portal.** Updated parameters to hide navigation when using the Member Portal in a custom framed website. Please call support if you wish to utilize this update.