

Rapattoni *Magic-Cloud* AMS Maintenance Report

2.2.02

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 2.2.02.

Membership

After reactivating an existing member record, users were previously required to look up the last MLS ID in order to assign a new MLS ID. This has been updated so that users can press the *F5* key after parking on the MLS ID field in the Member Information Form or Office Information Form to display the last auto-assigned ID and the highest ID for both member and office. (RNI 170224-000426)

The "Address On Roster" and "Phone On Roster" fields have been added in the Cloud AMS Export Manager for the Member Association Maintenance Form, allowing users to filter out members who have opted to be excluded from rosters. (RNI 180418-000169)

Previously, adjusting the column width of the Member # field on the Member Quick Search would change the member number to an asterisk for members with alerts, with a similar issue for Office # in the Office Quick Search. This has been resolved so that these member and office numbers now display properly when adjusting column widths. (RNI 180618-000021)

When adding a new member or office record, in some instances the Association ID was not populating based on the Default Associations Table, and a "DB Error" displayed after attempting to save the new record. This issue has been resolved so that the Association ID is populated correctly and the record can be saved without triggering errors. (RNI 171114-000168)

Associations that utilize the Print Membership Cards feature were experiencing an issue that presented users with a "Start execution?" prompt when running the report. This has been resolved and the prompt no longer displays. (RNI 180822-000054)

When adding member or office records, the Member # and Office # weren't being validated as required fields until the new record was submitted. This has been updated so that the Member # and Office # are validated immediately after leaving the fields. (RNI 171019-000169)

In some instances, the print workflow for rosters was not functioning properly due to the use of a \temp directory and issues with Postscript compatibility. Solutions have been implemented to resolve these issues so that rosters open as PDFs and print as intended. (RNI 180703-000106)

The Member Association Maintenance Form and Member Query Form exports have been updated to make the following fields available: IMS Password, Birthdate, and Voting Precinct. (RNIs 180628-000139, 180723-000058 & 180731-000016)

Accounting

Previously, the “Post CC Charge Back” and the “Post NSF Check” processes on the Receipt History Form were triggering errors and incorrectly using the Personal Check payment type instead of Non-Monetary. This has been resolved and users are now able to complete both processes properly using the correct payment type. (RNIs 180612-000130 & 180712-000048)

When adding a credit card on the Member Credit Card Info form, the “Allow Auto-Payment” option was checked by default and would remain checked even if the user deleted the Invoice Type and Sort Sequence. This has been updated so that the “Allow Auto-Payment” option is unchecked by default, as intended when adding credit cards within Cloud AMS. Note that the “Allow Auto-Payment” option is set by members in Internet Member Services (IMS) and is not intended to be modified within Cloud AMS. (RNI 180712-000060)

Users were previously permitted to edit the “Auto Pay” option from the Credit Card Expiration Form. This has been updated to make the setting unmodifiable within Cloud AMS, with Auto-Pay options set only by members in Internet Member Services (IMS). (RNI 180822-000128)

The Member Credit Card Info form was previously allowing users to save expired credit cards without validating the card until the user attempted a payment from the Post Payment form. This has been fixed so that the Member Credit Card Info form validates credit card expiration dates as intended. (RNI 180723-000076)

In some scenarios, after canceling out of the Sales Invoice Form, the Cash Receipts Posting Form would allow users to make a duplicate payment on a previously paid invoice. This has been fixed so that payments cannot be posted to paid invoices. Note that users can still create a \$0 invoice to process overpayments from members. (RNI 170712-000163)

After posting receipts on the Cash Receipts Posting Form, the cursor was returning to the Batch ID field even if the form was set to sort invoices by Member or Office. This has been fixed so that the cursor returns to the Member # field if invoices are set to display by Member, or to the Office # field if invoices are set to display by Office, allowing for the posting of multiple receipts more quickly and efficiently. (RNI 180824-000060)

When running the NRDS Settlement Import, pressing *F5* to zoom on the “Select Import File” path will now bring up the current user’s folder. (RNI 170620-000186)

After selecting a batch password on the Batch Form, the form would display the password in unencrypted text, even for users who lacked the required authorizations. This has been fixed so that the password text no longer displays for unauthorized users. Pressing *F5* to zoom on the batch password field will display the password and allow for it to be modified by users with the “Create Batch” right in Create mode, or by the batch user in Query/Modify mode. (RNI 180718-000078)

Education/Events

The Class Registration Export has been updated to make the following course certification information fields available: Certifying Office #, Certificate #, Certification Date, and Certificate. (RNI 171017-000139)

The Receiver Information Form previously did not require an entry in the Course Number field for education transmittals, resulting in errors when sending education records to the NAR CDB. The form has now been updated to require Course Number for courses added to the Education tab, eliminating the potential errors. (RNI 170316-000082)

Conventions

When navigating from the Convention Information (Query) Form to Convention Detail, the “Registered” count was being reset to zero. This has been fixed so that the value is preserved. In addition, an issue with Guest counts failing to update properly has been resolved so that the counts are updated on the query form when exiting registration.

Internet Member Services (IMS)

A direct call link has been made available for the “Change Password” feature, allowing it to be added as a menu option within IMS. This link is normally available from the “Personal Information” page but it previously could not be added to IMS sites which had the “Personal Information” page disabled in setup. Please contact your support representative if you would like assistance setting up the “Change Password” link. (RNI 170724-000225)

Opening the “Office View Account” form to pay invoices in IMS previously caused slow load times and timeout errors for larger offices. To resolve this issue, the form has been updated to show a maximum of three years of unpaid invoice history, and virtual indexing was implemented to further improve performance. The form now loads more quickly for large offices without triggering timeout errors. Note that as part of this change, the report of unpaid invoices is also now limited to three years; members will have to contact the association to inquire about older transactions. (RNIs 180321-000068 & 180209-000114)

Due to recent changes, inactive services were no longer showing for members in IMS, which prevented members from viewing the Inactive Service Message that was previously available in this scenario. Likewise, external service links also stopped displaying for members in IMS, preventing them from accessing the corresponding accounts. These changes have been removed so that inactive services and external services now display in IMS as they previously had, allowing members to view the Inactive Service Message for inactive services or open the link for external services. (RNIs 180717-000049 & 180717-000144)

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 2.2.02.

