

Rapattoni *Magic-Cloud* AMS Release Highlights

1.3.05

Rapattoni *Magic-Cloud* AMS 1.3.05 is here! This exciting new version gives your association access to the enhancements listed below as well a number of maintenance updates.

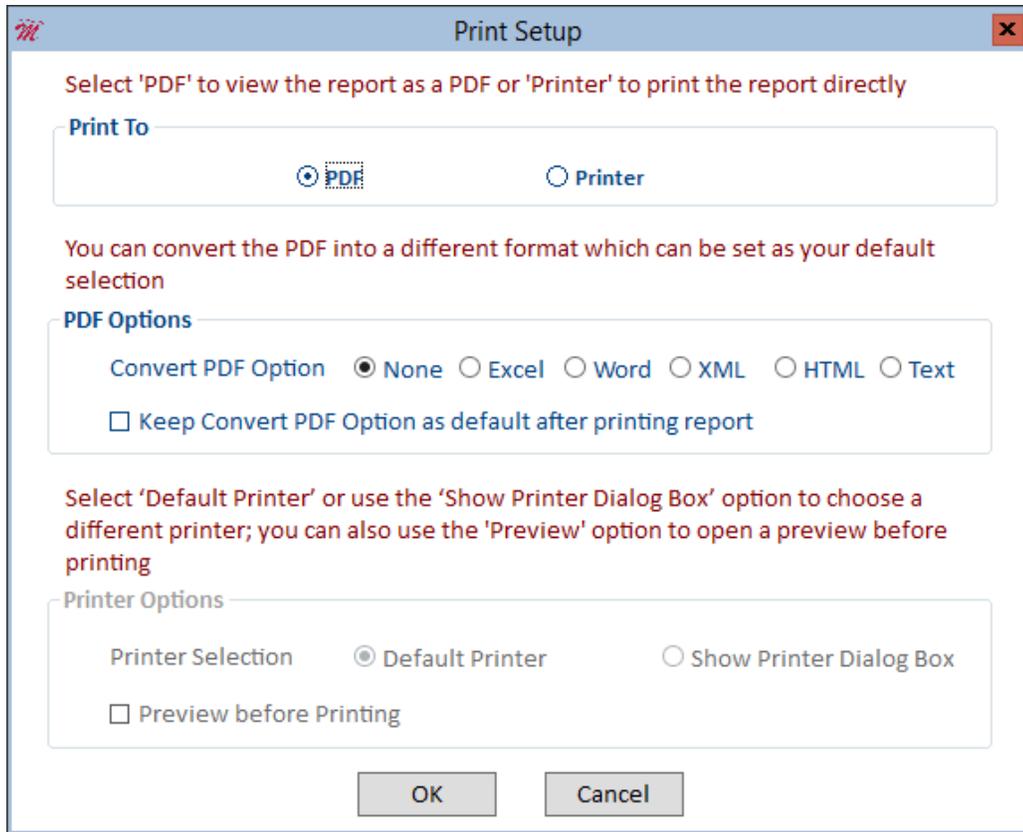
The following enhancements have been implemented in version 1.3.05 (installed the night of 10/13/2016 for customers hosted by Rapattoni).

Convert Your Reports from PDF to Excel, Word, and Other Formats

The Print Setup form has been updated with additional options for printing and generating PDFs. It is accessible from the "Actions" tab in the ribbon bar or by pressing Ctrl-I from anywhere in the system.

The form initially allows you to choose between running a PDF or printing directly to the printer. If PDF is selected, the report can optionally be converted to Excel, Word, XML, HTML, or a Text file to allow for data to be exported or modified. An additional check box allows you to retain this selection as the default setting for future reports.

When the Printer option is selected, you can choose whether to print to the default printer or bring up the printer dialog box to select a different printer. You can also open the report as a preview before printing if desired.



Print Setup

Select 'PDF' to view the report as a PDF or 'Printer' to print the report directly

Print To

PDF Printer

You can convert the PDF into a different format which can be set as your default selection

PDF Options

Convert PDF Option None Excel Word XML HTML Text

Keep Convert PDF Option as default after printing report

Select 'Default Printer' or use the 'Show Printer Dialog Box' option to choose a different printer; you can also use the 'Preview' option to open a preview before printing

Printer Options

Printer Selection Default Printer Show Printer Dialog Box

Preview before Printing

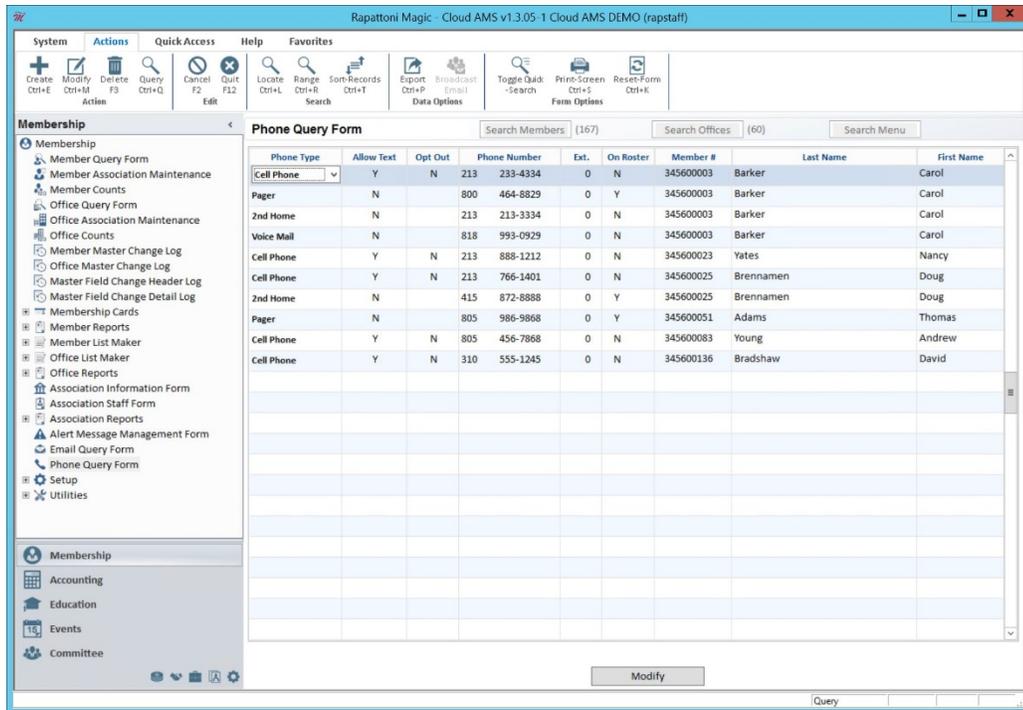
OK Cancel

New Text Messaging Options and Phone Query Form

“Allow Text” and “Opt Out” columns are now available in the Additional Phones table on the Member Information Form, allowing you to track which member phones can receive text messages and which should be opted out. In addition, a new “Allow Text” field in the Phone Type Table lets you set a default value for each individual phone type.

Phone Type	Phone Number	Ext	Notes	On Roster	Sort Order	Allow Text	Opt Out

To work with this phone data, a new Phone Query Form allows you to range on phone type and then export member phone data, with the ability to exclude members who have opted out of text messaging.



Preferred Phones Added to Member Information

The Member Information form now includes a “Preferred Phones” section showing the phone numbers designated as Primary, Secondary, and Other in the member’s preferences. Each phone number displays with its corresponding label.

Contact Phones		Preferred Phones	
Office	(555) 555-5555	Extension	0
Home	123 456-789		
Personal Fax	-		

New Charge Code Table plus Copy and Auto-Prorate Features

A new Charge Code Table is now available under Billing Setup, allowing users to view all Charge Codes in a single table without filtering by Charge Code Set. A column showing Proration periods is included in this table.

Charge Code	Set #	Category	Invoice Type	Description	Member Price	Account	Memo	Taxable	Proration
9598	ASOC	11	N	RPAC Contribution - 1995	30.000	0030550000	Y	N	
9599	ASOC	10	D	RPAC Contribution - 1995	25.000	0030550000	Y	N	
9610	ASOC	10	D	Local Dues - 1996	115.000	0030100000	N	N	4
9611	ASOC	11	N	Non Member Local Dues - 1996	150.000	0030100000	N	N	4
9612	ASOC	10	D	Affiliate Dues - 1996	115.000	0030100000	N	N	
9615	ASOC	11	N	DR Local Dues - 1995	115.000	0030100000	N	N	4
9620	ASOC	10	D	State Dues - 1996	75.000	0030200000	N	N	4
9621	ASOC	11	N	State Dues - 1996	75.000	0030550000	N	N	4
9630	ASOC	10	D	NAR Dues - 1996	64.000	0030300000	N	N	4
9631	ASOC	11	N	NAR Dues - 1996	64.000	0030550000	N	N	4
9698	ASOC	11	N	RPAC Contribution - 1996	30.000	0030550000	Y	N	
9699	ASOC	10	D	RPAC Contribution - 1996	25.000	0030550000	Y	N	
9710	ASOC	10	D	1997 - Local Dues	120.000	0030100000	N	N	4
9711	ASOC	11	N	1997 - Non Mem Local Dues	150.000	0030100000	N	N	4
9712	ASOC	10	D	1997 - Affiliate Dues	120.000	0030100000	N	N	4
9715	ASOC	11	N	1997 - DR Local Dues	120.000	0030100000	N	N	4
9720	ASOC	10	D	1997 - State Dues	84.000	0030200000	N	N	4
9721	ASOC	11	N	1997 - State Dues	84.000	0030200000	N	N	4
9730	ASOC	10	D	1997 - NAR Dues	64.000	0030300000	N	N	4
9731	ASOC	11	N	1997 - NAR Dues	64.000	0030300000	N	N	4
9740	ASOC	11	N	Legal Fee	5.000	0030300000	N	N	
9798	ASOC	12	D	RPAC Contribution - 1997	30.000	0030550000	Y	N	
9799	ASOC	10	D	RPAC Contribution - 1997	25.000	0030550000	Y	N	

Set #: ASOC Assoc. Charges Category: 11 Non-Member Assessment Invoice Type: N Annual DR/Non Member Dues

On the Charge Code Information Form, a new “Copy Charge Code” button can be used to create a new Charge Code based on the selected Charge Code. The initial Charge Code data can be updated on the Copy Charge Code form and additional fields can be modified after the Charge Code is created. For Charge Codes that include proration, the Prorate Table can be created with the Starting Month/Year and the number of Periods copied over and calculated based on the new Charge Code’s Amount field.

Copy Charge Code

This process will copy the data from Charge Code: 05AFN to the new Charge Code. You can modify any additional info on the Charge Code Information Form after the copy process is completed.

New Charge Code Data

New Charge Code:

Description:

Amount:

Billing Year:

Prorate Table

Create Prorate Table

Starting Month/Year:

Periods to Prorate:

The process for adding proration to existing Charge Codes has also been streamlined. From the Charge Code Information Form, clicking the “Prorate Table” button for a Charge Code that was not previously set up with proration will open a new Auto Generate Prorate Table dialog. Users may enter the Starting Month/Year and Periods to Prorate on this form and click “OK” to automatically create the table, or click “Cancel” to manually create the Prorate Table instead.

Auto Generate Prorate Table

This process will generate the prorate table for the number of periods entered

Update Criteria

Charge Code	EDUCA	Education \$135 - chg as needed
Amount to Prorate		135.000
Starting Month/Year	10/2016	
Periods to Prorate		12

OK Cancel

In addition to these changes, the “Prorate Table” button on the Charge Code Information Form has been updated to display the number of proration periods.

Prorate Table (12)

“Billing Email” Field Added to Membership

A new “Billing email” field has been added to Member Information. This new email field is leveraged in the Cloud AMS Billing programs as well as the Print Statements/Invoice and Print Receipts programs. Note that for members with no Billing email stored in the database, Cloud AMS will default to the member’s standard Association email when running email billings.

Internet

Association email	test@rapattoni.com	
Billing email	billing@rapattoni.com	
NAR/State email	test@rapattoni.com	
Web Address		

The new “Billing email” field can also be added to IMS so that members can update their email addresses. You may enable the field for IMS once your association is ready to begin using it.

New Contributions Form Queries Members by Charge Code

As an alternative to reviewing contributions for individual members, a new Member Contributions Form/Code program allows you to view all members that have made contributions for a selected Charge Code. This data can then be exported or it can be used to send broadcast emails.

Member Contributions Form/Code Search Members (35,305) Search Offices (9,565) Search Menu

Charge Code	Description	Set #	Category	Description	Billing Year	Contributions	Pledges
07RSD	CAR Voluntary RSDC 2007	USED	10	Realtor Dues	2007	372	0
12PSF	CAR Voluntary RPAC 2012	USED	10	Realtor Dues	2012	734	0
13PSF	CAR Voluntary RPAC	DBR	10	Realtor Dues	2013	1,085	0
14RPC	CAR Voluntary RPAC Dues	DBR	10	Realtor Dues	2014	1,240	0
15RPC	CAR Voluntary RPAC Dues	DBR	10	Realtor Dues	2015	1,418	0
9541	PSF	USED	10	Realtor Dues	1995	187	0

Contributions | Pledges

Member #	Name	Billing Group	Date	Source	State Trans #	Amount	Check Date	Pmt Type	Card/Check #
0000	John A. Wilson	DBR	09/15/14	DUES	0	25.00	00/00/00	O	
0000	David A. Johnson	DBR	08/11/14	EC	0	25.00	00/00/00	V	
0000	Thomas J. Johnson	DBR	09/30/14	DUES	0	25.00	00/00/00	P	
0000	Thomas A. Johnson	DBR	09/24/14	EC	0	25.00	00/00/00	V	
0000	John L. Johnson	DBR	10/03/14	EC	0	25.00	00/00/00	V	
0000	John F. Johnson	DBR	09/22/14	DUES	0	25.00	00/00/00	P	
0000	John A. Johnson	DBR	09/04/14	EC	0	25.00	00/00/00	V	
0000	John A. Johnson	DBR	11/11/14	EC	0	25.00	00/00/00	V	
0000	John A. Johnson	DBR	11/10/14	DUES	0	25.00	00/00/00	P	
0000	John A. Johnson	DBR	09/29/14	EC	0	25.00	00/00/00	A	
0000	Thomas A. Johnson	DBR	09/30/14	EC	0	25.00	00/00/00	V	
0000	Thomas A. Johnson	DBR	10/06/14	EC	0	25.00	00/00/00	V	
0000	Thomas A. Johnson	DBR	10/27/14	EC	0	25.00	00/00/00	V	
0000	Thomas A. Johnson	DBR	12/03/14	EC	0	25.00	00/00/00	V	
0000	Thomas A. Johnson	DBR	09/24/14	DUES	0	50.00	00/00/00	O	
0000	John A. Johnson	DBR	10/07/14	DUES	0	25.00	00/00/00	O	
0000	John A. Johnson	DBR	09/26/14	EC	0	25.00	00/00/00	V	
0000	John A. Johnson	DBR	10/13/14	EC	0	25.00	00/00/00	V	
0000	John A. Johnson	DBR	10/14/14	EC	0	25.00	00/00/00	M	
0000	John A. Johnson	DBR	08/22/14	DUES	0	25.00	00/00/00	O	

In addition, the old Contributions form which queries by member has been renamed to "Member Contributions & Pledges Form" in the navigation bar and menu quick search in order to distinguish it from the new form.

Redesigned Email Query Form

The Email Query Form has been updated to display inside the main Cloud AMS workspace rather than opening as a pop-up, and has been redesigned to present information in a grid with filtering, sorting, and additional tools.

Rapattoni Magic - Cloud AMS v1.3.05 - 1 Cloud AMS DEMO (rapstaff)

System Actions Quick Access Help Favorites

Create Ctrl+E, Delete F3, Query Ctrl+Q, Cancel F2, Edit F12, Locate Ctrl+L, Range Ctrl+R, Search, Sort-Records Ctrl+T, Export Ctrl+P, Broadcast Email, Toggle Quick Search, Print-Screen Ctrl+S, Form Options, Reset-Form Ctrl+K

Membership | **Email Query Form** Search Members (167) Search Offices (60) Search Menu

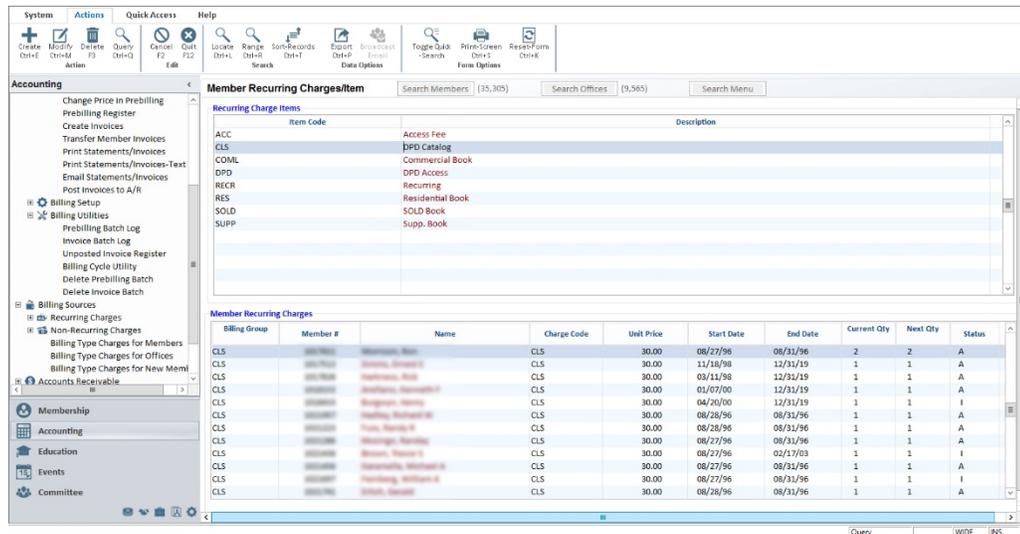
Email Address	email Type	Member #	Last Name	First Name
bobemail@gmail.com	NAR/State	345600178	Newhall	Bob
cbarker@rapattoni.com	Association	345600003	Barker	Carol
copythisemail@rapmeistec.com	Association	345600056	Speilberg	John
copythisemail@rapmeistec.com	Association	345600094	Stone	Jeffery
crotzler@rapattoni.com	Association	345600087	Rotzler	Sherrilyn
crotzler@rapattoni.com	NAR/State	345600087	Rotzler	Sherrilyn
Dahl@douglas.com	Association	345600025	Brennamen	Doug
Dahl@douglas.com	NAR/State	345600025	Brennamen	Doug
DHart@ERAREalty.com	Association	345600015	Hart	Daniel
Doreen@newtownrealty.com	Association	345600138	Butera	Doreen
DSWEENEY@douglas.com	Association	345600026	Sweeney	Daniel
DSWEENEY@douglas.com	NAR/State	345600026	Sweeney	Daniel
dylan@aol.com	Association	345600052	Lincoln	Dylan
dylan@aol.com	NAR/State	345600052	Lincoln	Dylan
Faithhill@evans2realty.com	Association	345600181	Hill	Faith
Faithhill@evans2realty.com	NAR/State	345600181	Hill	Faith
fjff@gmail.com	Association	345600195	Rittersdorf	Frank
fjff@gmail.com	NAR/State	345600195	Rittersdorf	Frank
FRANK@YAHOO.COM	Association	345600004	Andrews	James

Internet Info: Association email bobemail@gmail.com, Billing email bobemail@gmail.com, NAR/State email bobemail@gmail.com, Web Address

Query | WIDE | INS

Exports and Additional Updates for Recurring and Non-Recurring Charges

The Member Recurring Charges/Item form and the Member Non-Recurring Charges/Billing Group form have been updated with Export functionality, allowing for records to be exported using the field chooser in the Cloud AMS Export Manager.



The screenshot shows the 'Member Recurring Charges/Item' form. The top section, 'Recurring Charge Items', lists various items with their codes and descriptions:

Item Code	Description
ACC	Access Fee
CLS	DPD Catalog
COAL	Commercial Book
DPD	DPD Access
RECR	Recurring
RES	Residential Book
SOLD	SOLD Book
SUPP	Supp. Book

The bottom section, 'Member Recurring Charges', displays a table with the following columns: Billing Group, Member #, Name, Charge Code, Unit Price, Start Date, End Date, Current Qty, Next Qty, and Status.

Billing Group	Member #	Name	Charge Code	Unit Price	Start Date	End Date	Current Qty	Next Qty	Status
CLS	100000	Members, All	CLS	30.00	08/27/96	08/31/96	2	2	A
CLS	100000	Members, Contact	CLS	30.00	11/18/98	12/31/19	1	1	A
CLS	100000	Members, Book	CLS	30.00	03/11/98	12/31/19	1	1	A
CLS	100000	Members, Commercial	CLS	30.00	01/07/00	12/31/19	1	1	A
CLS	100000	Members, Residential	CLS	30.00	04/20/00	12/31/19	1	1	I
CLS	100000	Members, Access	CLS	30.00	08/28/96	08/31/96	1	1	A
CLS	100000	Members, Supp. Book	CLS	30.00	08/28/96	08/31/96	1	1	A
CLS	100000	Members, Catalog	CLS	30.00	08/27/96	08/31/96	1	1	A
CLS	100000	Members, Contact	CLS	30.00	08/27/96	02/17/03	1	1	I
CLS	100000	Members, Commercial	CLS	30.00	08/27/96	08/31/96	1	1	A
CLS	100000	Members, Residential	CLS	30.00	08/27/96	08/31/96	1	1	I
CLS	100000	Members, Access	CLS	30.00	08/28/96	08/31/96	1	1	A

The main Member Recurring Charges and Member Non-Recurring Charges forms have also been updated with new radio button options allowing the forms to show “All Members” or “Only Members with Charges.”

All Members

Only Members with Charges

In Addition, the Non-Recurring Charges programs have been updated to open inside the main Cloud AMS workspace rather than as pop-ups, with menu items now available in the navigation bar and the menu quick search.

Allow IMS Logins Using Email Address

As an optional feature, your association can now allow members to log onto IMS using an Association Email address instead of Login ID.

By default, IMS will continue to require Login ID without permitting logins using Association Email. Please contact Rapattoni *Magic* Support at 866-730-7115 if you'd like to enable IMS logins using Association Email addresses.

Note that if email logins are enabled for IMS, the Login ID field will be automatically set to accept up to 80 characters, overriding the previous maximum length setting to ensure that the field can accommodate long email addresses.

Rapattoni *Magic-Cloud* AMS Maintenance Report

1.3.05

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 1.3.05 (installed the night of 10/13/2016 for customers hosted by Rapattoni).

Broadcast Emails

When running a broadcast email, in some instances the mailing was not picking up all members due to exceeding the maximum character limit for the BCC list. This has been fixed so that the system will generate multiple emails when necessary to include all registrants, with a prompt notifying the user that multiple emails will be generated. (RNI 160914-000035)

For broadcast emails generated from the Class Registration Form or Event Registration Form, registrants who had cancelled were inadvertently being included in the broadcast email. This issue has been resolved so that registrants who cancelled are not included in the broadcast emails. (RNI 160914-000191)

Class Information

On the Class Information Form, the "Print Tickets" and "OK to Purge" check boxes were not being saved on exit. This has been fixed and these check box selections are now saved as intended. (RNI 160721-000065)

Exports

Exports run from the Event Registration Form and Class Registration Form now include a section with supplemental information. (RNI 160627-000189)

Statements/Invoices

The Statement/Invoice Setup Form previously was not displaying the Minimum Balance fields. This has been fixed so that "Balance" and "Percentage" fields are now available when the Minimum Balance Option is selected while setting up a Statement/Invoice Type. (RNI 160826-000065)

Previously, the 'Association BCC Email Address' option could only be set up from the Email Statements/Invoices Form, and the feature would then apply to the entire billing. It is now possible to enable the 'Association BCC Email Address' option and manually input an email address when printing receipts from a member's Accounts Receivable Form, allowing the feature to be used for individual members. (RNI 160606-000252)

On the Batch Total Query Form, the system would not display the detailed lists of invoices as intended, and it was not possible to exit from the resulting form. This issue has been fixed and buttons have been added to the form for navigating to Receipts, Void Receipts, Invoices and Void Invoices.

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 1.3.05.

