



Release Highlights 2.5.02

Rapattoni *Magic*-Cloud AMS 2.5.02 is coming soon! This exciting new version will give your association access to the enhancements listed below as well as a number of maintenance updates.

[CLICK HERE](#) to watch a short video of the new enhancements/features included in this release!

The following enhancements have been implemented in version 2.5.02:

- **NEW! Member License Query Form for Reporting & Exporting Additional License Information**
- **NEW! Notes Query Form for Reporting & Exporting Member/Office Notes Information**
- **NEW! Delete Expired Credit Cards Utility for Deleting & Exporting Expired Credit Card Data**
- **UPDATE! Member Portal: Updated Calendar Display for Class/Event Wait List Status**
- **NEW! Member Portal: New Option to Hide Balance Due Widget**

NEW! Member License Query Form for Reporting & Exporting Additional License Information

A new Member License Query Form has been added to Cloud AMS, allowing you to report and export additional license information. Included on this form is a new “Primary” field indicating if the member has a primary license number. When the “Primary” field is set to N (No), the data provided represents additional licenses.

Member Number	First Name	Last Name	State	License Number	License Expiration Date	License Type	Description	Primary
1					01/01/2021	B	Broker License	N
2					01/01/2021	C	Conditional License	N
3					01/17/2013	B	Broker License	Y
3					01/01/2021	F	Officer	N
4					09/24/2011	S	Salespersons License	Y
4					01/01/2021	B	Broker License	N

NEW! Notes Query Form for Reporting & Exporting Member/Office Notes Information

A new Notes Query Form has been added to Cloud AMS, allowing you to report and export member and office note information. Included on this form is a new “Member Office Number” field that represents the member (M) or office (O) depending on the record type.

Notes Query Form			
Search Members (4,239)		Search Offices (1,221)	
Search Menu			
Record Type	Member Office Number	Note Code	Note Text
M		MEM	
M		IBIO	
O		ACTG	
O		OFFN	

NEW! Delete Expired Credit Cards Utility for Deleting & Exporting Expired Credit Card Data

The new Delete Expired Credit Cards utility allows you to delete multiple expired credit cards simultaneously. Simply search for the expired credit cards using the date field on the form and click the “Proceed” button. You will receive a confirmation message verifying that you want to permanently delete all credit cards up to the date you selected. Once completed, an excel spreadsheet will automatically display containing all exported credit card data that was deleted.

Please note that you are only able to delete credit cards with expiration dates up to the last day of the prior month. You will receive an error message if you attempt to delete a credit card with an expiration date in the current month or with a future expiration date.

Delete Expired Credit Cards						
Search Members (4,238)		Search Offices (1,221)		Search Menu		
Selection Criteria						
<p>WARNING!!! PRIOR TO RUNNING THIS UTILITY, PLEASE DISABLE IMS PAYMENT SERVICES AND ENSURE NO STAFF ARE CREATING RECEIPTS WHILE EXECUTING THIS PROGRAM!!!</p> <p>Please select a date on or before 03/30/2021 to proceed</p> <p>Date: <input type="text" value="03/30/2021"/> <input type="button" value="Proceed"/></p> <p>WARNING - This operation will delete expired credit cards from your database; proceed with caution</p>						
Last Name	First Name	Member Number	Payment Type	Credit Card #	Expiration Date	
			V			
			V			
			V			
			V			
			M			

UPDATE! Member Portal: Updated Calendar Display for Class/Event Wait List Status

The calendar and Member Portal home page have been updated to show a new orange color and icon under the “My Registered Events and Classes” section, designating classes and events for which the user is on the Wait List.

Legend: ■ = Events ■ = Classes ■ = You are registered ■ = Wait List ■ = Closed

My Registered Events and Classes

MAY 1 Saturday

Free Class

📅 Saturday, May 1st
🕒 9:00am - 12:00pm
📍 Monterey Plaza Hotel
Status: Open / Spaces Available: 9993

[View Details](#)
[Add to Calendar](#)

MAY 11 Tuesday

Wait List

📅 Tuesday, May 11th
🕒 9:00am - 12:00pm
📍 Monterey Plaza Hotel
Status: Full / Spaces Available: 0

🕒 Wait List

[View Details](#)
[Add to Calendar](#)

Click on any description below to begin the registration process

Legend: ■ = Events ■ = Classes ■ = You are registered ■ = Wait List ■ = Closed

July 2021

[month](#) [week](#) [day](#)

Tue	Wed	Thu	Fri	Sat
29	30	1	2	3
		10:00 am IMS Display (Class:IMSDIS)		

NEW! Member Portal: New Option to Hide Balance Due Widget

A new option has been added to the Member Portal Balance Due widget allowing you to remove the widget from the home page display.

If you would like to disable the Balance Due widget on the Member Portal home page, please contact AMS Support.

As always, if you have any questions on these features or any other 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 via email to support@rapattoni.com.

Rapattoni *Magic-Cloud* AMS Maintenance Report

2.5.02

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 maintenance items have been implemented in version 2.5.02.

Accounting

- **Default Billing Address for Credit Cards.** Previously, when attempting to add or modify a new credit card, the system would automatically save the address for the card using data from the Preferred Mailing Address field instead of the default Home Address field. For existing credit cards, the system would also revert the credit card address information back to the Preferred Mailing Address after being modified. These issues have been fixed and the system now saves new credit cards using the default Home Address field and retains address data for existing credit cards as intended.
- **Month End “Journal Entry Export” Form Re-Design.** Previously, users would designate a file path to save exported files to a specified location on their workstation using the Directory field on the Journal Entry Export form. With this update, the Directory field has been removed and the system will now open the user-specified file type when exporting data for you to save to your workstation.

Committees

- **Committees Form.** The Committees Form by Committee has been updated so that the “Primary Association” field now displays as “Association” instead, allowing members that belong to secondary associations to display in the field for export purposes and broadcast emails.

Events & Education

- **Classes & Events ID Field.** When creating a new class or event with spaces in the ID field, the Class/Event Description and Registration Description would not display properly. This issue has been resolved and users are now able to enter spaces in the class and event ID fields.

Member Portal

- **Classes/Events Payment Information Display.** The unnecessary “Office ID” and “Select an office” fields have been removed from the Payment Information page of the Member Portal.
- **Fields Re-Added to Class Details Page.** Following a previous upgrade, detailed class and course information including course credits, format, instructor information, etc., was removed from the Member Portal’s Class Detail and Class Registration pages. This issue has been resolved and the information now displays.