ATOM SOFTWARE UPDATES – 2023
Fall Release

MISCELLANEOUS

FRESH NEW LOOK AND FEATURES

- Logo
- Website
- Application – Responsive to any Interface *(Desktop / Tablet / Mobile)*
    - *Mlogin.aspx* no longer needed and the *M* needs to be removed

SELF CHECK-IN / LOBBY TRACKER / LOBBY INFORMATION

- Appointment Type Added

PROSPECT PORTAL

- Block Incoming Prospect Messages (Email / Phone # Match)
    - *Set up: ADMIN>Core Configuration>Communications Security Properties>Blocked Emails*

CLIENT PORTAL

- Login Selection
    - Defaults to ID
- Information Cards Added - *(Status / Balance Due / E-Sign / Documents / Messages / Appointment)*
- Instructions Bar Added
- Quick Links Added
    - *Set up: ADMIN>Core Configuration>Client Portal Configuration>Client Portal Link Configuration>Display in Quick Links*
- Where's My Refund
    - Links Menu Added
- My Messages
    - Delete Functionality Added

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LOGIN

TOP BANNER

- Login
- Company Logo / Tabs / Tasks / Messages / User

HEADER

- Office Event Header Count
    - Lobby *(default)*
    - Other Events
        - *Set up: ADMIN>Category Types>Event Status>Display on Header Count*

- Data Management Menu
    - Calls
        - Move Client Calls
    - Office Events
        - Punch Clock Hours Added
    - Productivity
        - Punch Clock Hours Added
        - Actions Added
        - User Productivity Details Log
            - Assigned To and Note Fields Added

- EF Data Import Menu *(Drake / Crosslink / Tax Wise)*
- Check-In Alert Pop-up Box *(Requested Appointment / Walk-In)*

HOME PAGE

OVERVIEW

- Assigned Tasks
  - Due Date Heartbeat Alert
- Messages
- Appointments
- Work Schedule
  - Employee Name and Hours Column Added
  - Export Schedule to Excel Added

OFFICE COMMUNICATIONS

- Portal
  - Filter Messages by Subject
  - Automatic Replies based on Work Schedule
    - *Set up: ADMIN>Messaging>Predefined Client Portal Messages>Automatic Replies based on Work Schedule*

- Prospect
  - Filter Messages by Subject
  - Automatic Replies based on Work Schedule
    - *Set up: ADMIN>Messaging>Predefined Prospect Messages>Automatic Replies based on Work Schedule*

- Text
  - Automatic Replies based on Work Schedule
    - *Set up: ADMIN>Messaging>Predefined Text Messages>Automatic Replies based on Work Schedule*

- Email
  - Automatic Replies based on Work Schedule
    - *Set up: ADMIN>Messaging>Predefined Email Messages>Automatic Replies based on Work Schedule*

HOME PAGE (CONT.)

OFFICE TASKS

- Due Today
- Past Due

OFFICE EVENTS

- Scheduled Appointment Alerts
  - Due Today – current day w/out overlapping
  - Due Now *(heartbeat)* – 15 mins before appointment to 15 mins after appt.
  - Past Due – 15 mins after appointment date
    - *Set up: ADMIN>Category Types>Event Status>Display Past Due>For Scheduling Date*
- New Event Column
  - E-Signed Column Added
- Office Event Drawer Added
- Filter Drawer Added
- New Add drop down Menu
- New Actions drop down Menu

DAILY LOG

- Last Event Status Highlighted If End Date but Not Completed

SEARCH

- Advanced Search Filter Drawer Added
- Recent Files
- Favorites

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PUNCH CLOCK

- Punch Clock
- Employee Hours
- Billable Punch Clock
- Billable Employee Hours

CALENDARS

APPOINTMENTS

- New Filter Drawer
- Send Batch Notifications by Appointment Type
- Online Appointments Page
    - Phone # and Email Auto Lookup to Prevent Existing Client Use
- Appointment Reminders
    - Dynamic Fields *(Date, Time & Preparer)* NO Longer Default. They **MUST** be Manually Added in ADMIN>Email Text Templates>Appointment Reminders

AVAILABILITY

- New Add Employee Availability Drawer

WORK SCHEDULE

- New Filter Drawer
- New Add Employee Work Schedule Drawer

LINKS

- New Add Links Drawer

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USERS

- Tax / Reporting Information
  - User Names Highlight when Begin/End Dates are Expired
- User Sidebar Added – *No More Scrolling*
- User Documents
  - New Add Users Drawer

PHONE

- Intercom
  - Incoming Calls - Caller ID *(know who's calling you before you answer)*
  - Missed Calls – Caller ID *(know what calls you missed)*
- In Queue
  - Send Calls to Voice Message at Will
    - *Set up: ADMIN>Core Configurations>Communication Security Properties – Twilio VoIP Security Configuration>Twilio Voice – Enable Voicemail*

REPORTS

- Bookkeeping – Transaction Entries Report
  - Discount Column Added

- Bookkeeping – Transaction Entries (XML Export)
  - Discount Column Added

- Discrepancy Reports
  - Non-Completed Returns Removed from Workflow *(Identify those Clients Closed by Mistake)*

- Upload Report
  - E-Signature Required & E-Signature Received Columns Added

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ADMIN

- New Menu Organization *(Actions / Category Types / Core Configuration / Messaging)*

- Batch Messages *(Messaging)*
  - New Advanced Filtering Drawer

- Company *(Core Configuration)*
  - Company Side Bar Added
  - Company Uploads
    - NEW Add Uploads Drawer

- Upload System Logo and ICON *(Core Conjuration)*

FILE INFORMATION

SIDEBAR

- Sidebar Added – *No more Scrolling*
  - Show / Hide Sidebar
  - Red Information Bullets

- Quick Actions Menu Added

CONTACT SUMMARY

- Summary Cards Added - *(Balance Due / Account Documents / Permanent Documents / E-Sign / Opent Accounts / Events / Appointment)*

- Account / Client Representatives / File Settings / Identification

- Special Condition / Permanent Note

CONTACT INFORMATION

- Copy Access Code ICON
- Actions Menu Added
- Links Menu Added

FILE INFORMATION (CONT.)

PERMANENT NOTE

APPOINTMENTS

ACCOUNT INFORMATION

- Actions Menu Added
- Links Menu Added
- Disable Status Drop Down Menu
  - *Set up: ADMIN>Category Types>Event Status>Disable Account Information Status Menu Pull Down Option*

EVENTS

- Actions Menu Added
- Print Menu Added
- Update Button Added *(formerly Mark as Done / Undone)*
- Disable/Enable Status Override at User Level
  - *Set up: ADMIN>Core Configurations>Users>Security Restrictions and Permissions>Event & Business Type Permissions>Disable Event Status Override*

TRANSACTIONS

- Actions Menu Added
- E-Pay Menu Added
- Print Menu Added
- Update Button Added *(formerly Mark as Done / Undone)*
- Totals (Current / Other / Linked)

FILE INFORMATION (CONT.)

EF DATABASE

- Links Menu Added *(Federal and State Refund Links)*

TASKS / NOTES INFORMATION

- Actions Menu Added
- Update Button Added *(formerly Mark as Done / Undone)*

ACACOUNT DOCUMENTS

- New Add Account Documents Drawer
- Actions Menu Added
- New E-Sign ICONs
  - Awaiting E-Signature
  - E-Signed

- Fax Feature
  - Coversheet Added
  - Faxed Image Added

PERMANENT DOCUMENTS

- New Add Permanent Documents Drawer
- Actions Menu Added
- Update Button Added *(formerly Mark as Done / Undone)*

FILE INFORMATION (CONT.)

CALLS / TEXT / E-MAIL / PORTAL MESSAGES / PROSPECT MESSAGES

- New Phone Contacts Drawer
- Actions Menu Added

ALL YEARS

- Open Years

FAVORITE LINKS

LINKED CLIENTS

- New Add Linked Drawer

COMUNICATION SUMMARY

- Summary Table