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PRINT the OUTLINE FIRST BEFORE SELECTING THE **Video Link**

MISCELLANEOUS

- New Screen Helps Added
- Help Menu Alert Notification "Heartbeat"

LOBBY INFORMATION PAGE

- Appointment Column
  - Appointment Type Override
    - *Set up: Client File>Account Information>Appointment Type*
  - Change Walk-In to Appointment
    - *Set up: Link Client to Appointment from Appointment Calendar*

PROSPECT PORTAL

- New Turnstile Captcha Added for Bot Protection

CLIENT PORTAL

- Portal Link Instructions
  - Always Display Instructions
    - *Set up: ADMIN>Core Configurations>Client Portal Configuration>Client Portal Link Configuration>Always Display Custom Instructions*

- Get A Copy of My Invoice and Receipt Table
  - Reduced to Three Columns for Better Visibility for Mobile

- Get A Copy of My Tax Return and Documents Table
  - Instructions Fully Customizable
  - Client Uploads Display at the Top for Easier Visibility

CLIENT PORTAL (CONT.)

- Request and Schedule Appointment Page
    - Field Layout Changes

- Upload Documents Page
    - Warning Message Reminding Client to Select Upload Button
    - Mobile Version
        - "Drag Files Here" bar Removed

HOME PAGE

USER OVERVIEW

- Renamed from Overview to User Overview
- Messages – Text Editor
    - Expand / Collapse Functionality Added

OFFICE INBOX

- Renamed from Office Communications to Office Inbox
- Filter Messages (Portal / Email / Text)
    - Set up: *ADMIN>Core Configuration>User>Security Restrictions and Permissions>Hide Page Controls*

- Warning Message Added to Remind You to Assign Notes
    - Portal / Prospect / Email / Text

OFFICE EVENTS

- Event Categories *(Collapsed)*
    - Alert Notification *(Red Dot)* Added when Records are: *Due Today, Due Now, or Past Due*

- Event Due Date Fields Highlighted
    - Due Now – Red
    - Due Today – Yellow
    - Past Due – Purple

HOME PAGE (CONT.)

- Column Sorting Added
  - *Set up: ADMIN>Category Types>Event Status>Column View Permissions>Sort Ordinal>Sort Order (descending / ascending)*

- Priority Badge Added *(Urgent)*
  - *Set up: Event Priority Level must be Set as Urgent*

SEARCH

- Advance Search Filters
  - Category Search Includes Category 2 Items in addition to Category 1 Items
  - Alert ICON (Red Dot) Added when Filter is Active

- Recent Searches Increased from 10 to the Last 50 Searches

SEARCH RESULTS

- Category 1 and Category 2 Display Together in the Category Column
- Account Year Balance Removed
- *Year / Business Type* Column Renamed to “Year” and Moved to the Left

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CALENDARS

APPOINTMENTS

- Appointment Side Drawer
  - Expand / Collapse Feature Added
  - Field Layout Changes
  - Referral Type Requirement Removed
    - *Set up: ADMIN>Core Configuration>Scheduler Properties>Calendar Schedule Properties>Require "Referral Type" Field for Appointments*
  - Link Appointment to a Client

AVAILABILITY

- Expand / Collapse Feature Added

WORK SCHEDULE

- Expand / Collapse Feature Added

PHONE

- Updated to the Latest SDK Version Providing Better Reliability and Security

- ATOM Phone Agent *(Show Hide Devices)*
  - Ringtone Device Added
  - Speaker Device Added

- Additional Voice Accents Added
  - French, French Canadian, Hindi, Cantonese, and Mandarin

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REPORTS

- *NEW* Bookkeeping – Client Balance Owed
    - Display All Clients with a Balance Owed

- Mailer Client Export Report
    - Secondary Contact Email Added
    - Current Event Status Added

- Management – Login Log
    - Easily Identify Successful and Unsuccessful Logins

- Management – Preparers Commission Report
    - Filter Users based on their Begin and End Dates

- Management – Preparers Commission Report (BP and Non-BP)
    - Filter Users based on their Begin and End Dates

- Management – Revenue / Employee Hours
    - Filter Users based on their Begin and End Dates

- Management – Tip Summary
    - Filter Users based on their Begin and End Dates

CLIENT FILE - SIDEBAR

NEW CATEGORY HEADINGS

- Client Name
- Business Type and Account Year
- Documents
- Communications
- Other

CLIENT FILE – SIDEBAR (CONT.)

SUBHEADING NAME CHANGES

- Contact Summary to Dashboard
- Contact Information to Name / Address
- Permanent Notes to Perm. Notes
- Account Information to Overview
- Events to Status
- Transactions to Balance
- All Years to Retention
- Account Documents to Account Docs
- Permanent Documents to Perm Docs
- Communication Summary to Communications
- Text Messages to Texts
- Portal Messages to Portals
- Prospect Messages to Prospects

ENHANCEMENTS

- Mobile Version
    - Layout Changes

- Contact Name Category Header
    - Taxpayer and Spouse ID Added
    - Taxpayer and Spouse Age Added
    - Deceased TP / Spouse – Age Highlights in Red

- Name / Address
    - Category 1 & Category 2 Color ICONs Added

- Perm. Note
    - Heartbeat Alert Added
        - *Set up: Select "Beat" Check box*

- Overview
    - Account User Added
    - Difficulty Added
        - Highlight Defaults to Yellow but can be Change to Red
            - *Set up: ADMIN>Category Types>Difficulty>Highlight*

CLIENT FILE – SIDEBAR (CONT.)

ENHANCEMENTS

- Status
  - Event Count Added
  - Heartbeat Alert Added
    - *Set up: Set Event Priority Level to Urgent*

- Balance
  - Transaction Count Added
  - Last Payment Method Added

- EF Data
  - Do Not E-file Notification Added

- Tasks / Notes
  - Task Count Added
  - Heartbeat Alert Added
    - *Set up: Set Priority Level to Urgent*

- Retention
  - Moved to the Business Type / Account Year Section
  - Retention Years Added

- Account Docs
  - Document Count Added

- Perm Docs
  - Document Count Added

- Communications Category Header
  - Links to the Communications Summary Table

- Calls
  - Call Count Added
  - Call Duration Added

- Texts
  - Text Count Added

CLIENT FILE – SIDEBAR (CONT.)

ENHANCEMENTS

- E-mails
    - E-mail Count Added
- Portals
    - Portal Message Count Added
- Prospects
    - Prospect Message Count Added
- Linked Clients
    - Client Count Added

CLIENT FILE - SECTIONS

DASHBOARD

- Client Referrals (RAF) Card Added

NAME / ADDRESS

- File Settings
    - Category 1 and Category 2 Color ICONs Added

ACCOUNT INFORMATON

- Do Not E-File Moved to the EF Data Section
- Add New Year/Business Type Side Drawer
    - Field Layout Changes
    - On Creation Office Events
        - Display by Event Ordinal
        - Disabled at User Level
            - *Set up: ADMIN>Core Configuration>User>Security Restrictions and Permissions>Event & Business Type Permissions>Disable on Creation Office Event Check Box*

CLIENT FILE – SECTIONS (CONT.)

EVENTS

- Add Event Side Drawer
  - Field Layout Changes
  - New Fields Added
    - Account User
    - Difficulty, Time, and Referral Type
      - Fields Display Only if Required and Not Completed

- Add and Update Buttons Display at the Top and Bottom of the Events
  - *Set up: ADMIN>Core Configuration>User>Security Restrictions & Permissions>Allow Batch Event Fields Override*
- Alert Notification Added - *Read Me!*
  - *Set up: Select "Beat" Check box*
- Warning Message Added to Remind You to Assign Event Notes

TRANSACTION INFORMATION

- Add Transaction Side Drawer
  - Field Layout Changes
- Add and Update Buttons Display at the Top and Bottom of the Transactions
  - *Set up: ADMIN>Core Configuration>User>Security Restrictions & Permissions>Allow Batch Event Fields Override*
- New Credit Card Processor *(Michigan Retailers Association)*
  - Online Processing
  - Terminal Processing *(Google Pay, Apple Pay, Tap, etc.)*

TASKS / NOTES INFORMATION

- Add Task/Note Side Drawer
  - Field Layout Changes
- Warning Message Added to Remind You to Assign Task/Notes

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CLIENT FILE - SECTIONS (CONT.)

ACCOUNT DOCUMENTS

- Add Account Upload Side Drawer
    - Field Layout Changes
- File Names – Special Character and Spacing Allowed

PERMANENT DOCUMENTS

- Add Permanent Upload Side Drawer
    - Field Layout Changes

CLIENT CALLS

- Phone Contacts Side Drawer
    - Dashes Display for All Phone Numbers
    - Drawer Automatically Closes after Phone Number Selected

TEXT MESSAGE LOG

- Add Text Side Drawer
    - Field Layout Changes

EMAIL LOG

- E-mail Message Side Drawer
    - Field Layout Changes
- Text Editor
    - Expand / Collapse Functionality Added

CLIENT FILE - SECTIONS (CONT.)

CLIENT PORTAL LOG

- Send Question / Note / Attachment
  - Field Layout Changes
  - NEW Dynamic Tip Link {TipSelectionLink}
    - *Set up: Embed the Dynamic Tip Link in a Predefined Client Portal Message*
- Text Editor
  - Expand / Collapse Functionality Added

PROSPECT MESSAEGS

- Text Editor
  - Expand / Collapse Functionality Added

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ISSUES CORRECTED

- Appointment Calendar
  - Account User Field will be Blank unless User is Requested
  - Overlapping Corrected
- Appointment Confirmations for Appointments made through the Client Portal or Prospect Portal
- Assigned Emails Will Display in User's Assigned Tasks Even if Sites are Restricted
- Batch Message Attachments Fixed
- Client Portal URL Link Embedded inside Email Notifications
- Discrepancy Report – Non-Matching Returns
- Editing Different Upload Types from ADMIN
  - Client Uploads, ID-Spouse, and ID-Taxpayer
- E-sign Spouse Only Fixed
- Home Page Office Events - Send and Add Buttons Fixed
- Home Page Office Events – Expand / Collapse Notes Fixed
- Home Page Office Tasks – Expand / Collapse Notes Fixed
- Jabra Headset Fixed
- New Appointment Side Drawer
  - Difficulty Field - Required Asterisk Removed
- New Client Appointment Page
  - Inactive Users removed from Drop-down Menu
- Phone (VoIP)
  - Retrieve Voice Messages from Apple Devices (iPhone) Fixed