

ATOM SOFTWARE UPDATES – 2024

Fall Release

MISCELLANEOUS (OVERALL)

- Google Translator Added (*Upon Request – Disclaimer Must be Signed*)
- Side Bar Added for Editing (*Events, Tasks, Transactions, etc.*)
- Assign Tasks Using Check Boxes rather than the CTRL Key
 - Selected Items Display First
- Summary Tables (*Events, Tasks, Transactions, etc.*)
 - Scroll Bar Added
 - Open Records Display First

CLIENT PORTAL

- Linked Clients Added to Login – “Pick an Account”
- Main Menu Link Added to Each Portal Page
- E-sign
 - E-Sign Required Link Moved to the Description Column Eliminating the Signature Column
 - E-Sign Required Links Display First
 - Printer ICON (*Signature Certificate*) Moved to the Actions Column
- My Documents
 - Scroll Bar Added
- My Messages
 - Scroll Bar Added
- Make Payment
 - *ATOMPay* to Replace Authorize.net [ATOMPay Introduction Video](#)
 - Scroll Bar Added

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HOME PAGE – USER OVERVIEW

MY ASSIGNED TASKS

- Side Drawer Added for Editing *Including Task Notes*
- Combine and Collapse Columns
- Priority Level Moved to the Name Column

HOME PAGE – OFFICE INBOX

OVERALL – (*Portal, Prospect, Text, and Email*)

- Selected Records Filter by Business Type
- Side Drawer Added for Editing
- Combine and Collapse Columns
- Priority Level Moved to the Name Column

CALENDARS

AVAILABILITY

- Add Additional Employees – “*Save and Add New*”

WORK SCHEDULE

- Add Additional Employees – “*Save and Add New*”

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REPORTS

- Client Portal – Activity Log
 - E-sign Client and E-Sign Spouse Added
- Discrepancy Report – Returns with No Preparer Assigned
 - Business Type Added
- Mailer Client Export
 - Spouse Nickname Added
- Payroll Report – Wage Detail
 - Company Name, Address, and Phone Number Added

ADMIN

- Account Rollovers
 - Account User Displays as “Self-Check-In” for Inactive Users
- Batch Messages
 - Dynamic Fields Added – *{FirstName}* or *{FullName}*

CLIENT FILE - SIDEBAR

NAME / ADDRESS

- Nickname Added
- ICONs Added for Disable SMS and Disable Email

OVERVIEW

- Account Type Added (1040)

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CLIENT FILE – SIDEBAR (CONT.)

RETENTION

- Retention Years Highlight in Yellow Indicating Open Years

CLIENT FILE - SECTIONS

DASHBOARD

- Quick Actions Dropdown Menu
 - Phone Contacts Added
- Client Portal Link Added

NAME / ADDRESS

- Spouse Name will not be Overridden with the Drake Import

EVENTS

- Combine and Collapse Columns
- Priority Level Moved to the Status Column
- Scroll Bar Added
- Side Drawer Added for Editing
- Add and Update Button Added to the Bottom of the Table
 - *Set up: ADMIN>User>Security Restrictions>Allow Batch Event Fields Override*

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CLIENT FILE - SECTIONS (CONT.)

TRANSACTION INFORMATION

- Combine Columns
- Side Drawer Added for Editing
- Scroll Bar Added
- Add and Update Button Added to the Bottom of the Table
 - *Set up: ADMIN>User>Security Restrictions>Allow Batch Event Fields Override*
- **ATOMPay** to Replace Authorize.net
 - Online Payment
 - Send Payment Link
 - Terminal Payment
 - Credit Surcharge / Dual Pricing
 - Flat Amount Added
 - *Set up: ADMIN>Core Configuration>Company & Tax Information>Credit Card Convenience Fee Options*
- Multi-Year Transaction is the Default when Balance Due

TASKS / NOTES INFORMATION

- Combine and Collapse Columns
- Side Drawer Added for Editing
- Scroll Bar Added
- Priority Level Moved to the Task Column

ALL YEARS

- Combine and Collapse Columns

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CLIENT FILE - SECTIONS (CONT.)

PERMANENT DOCUMENTS

- Combine and Collapse Columns
- Side Drawer Added for Editing
- Fax Feature Added
- Upload Type Column Moved
- Move Files
 - Account Year and Upload Type Fields Added

ACCOUNT DOCUMENTS

- Combine and Collapse Columns
- Side Drawer Added for Editing
- Upload Type Column Moved
- Fax ICON Moved to Actions Column
- Printer ICON (*Signature Certificate*) Moved to Actions Column

TEXT MESSAGE LOG

- Combine and Collapse Columns
- Side Drawer Added for Editing

EMAIL MESSAGE LOG

- Combine and Collapse Columns
- Side Drawer Added for Editing

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CLIENT FILE - SECTIONS (CONT.)

CLIENT PORTAL LOG

- Combine and Collapse Columns
- Side Drawer Added when Editing

PROSPECT MESSAEGS

- Combine and Collapse Columns
- Side Drawer Added for Editing

LINKED CLINETS

- Side Drawer Added for Editing