ATOM SOFTWARE UPDATES – 2024
Winter Release

MISCELLANEOUS

- EF Data Import *(Crosslink)* – Fixed

- Filters
  - Notification Label Added *(Red Dot)*

- Tooltip Label Sticking - Fixed

PROSPECT PORTAL

- Subject Heading changed to: "How Can We Help You?

CLIENT PORTAL

- Balance Due Card
  - $ Amount Includes Linked Client Balances
    - *Set up: Allow to Login in Client Portal*

- Documents Card
  - All Documents *(Years)* Display when Selected

- Esign Card
  - All Documents *(Years)* Display when Selected

- My Documents
  - Year Column Added
    - The Year will be Blank for Initial Client Uploads
  - New Documents Highlight in Yellow
  - Esign Documents Highlight in Yellow

CLIENT PORTAL (CONT.)

- Make Payment
  - NEW Tip Page Added *($1, $3, $5, $10, Custom, or No Tip)*
    - *Set up: ADMIN>Core Configuration>Company &Tax>Company>Enable Tip Functionality for Payments*
- Where's My Refund
  - Acknowledgments, Refund Amounts, and Balance Dues Highlight in Red or Green for Federal, State and City

HOME PAGE

OFFICE COMMUNICATIONS

- Fax
  - File Size Increased *(Files larger than 8MB Allowed)*

OFFICE EVENTS

- Office Event Categories Added
  - *Set up: ADMIN>Category Types>Event Status Categories*
  - *Set up: ADMIN>Category Types>Event Status / Office Events>Category*
- Office Event Column Changes
  - Refund Method
    - Approved Refund Advances – Highlight in Green
    - Declined Refund Advances - Highlight in Red
  - Scheduled Appointment
    - Future Date – No Highlighting
    - Due Now – Highlight in Red
    - Due Today – Highlight in Yellow
    - Past Due – Highlight in Purple

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PUNCH CLOCK

- Employee Hours
    - User Field Added Back

CALENDARS

APPOINTMENTS

- Appointment Pop-up Box – *Click and Drag (Reminder)*

REPORTS

- NEW Management – Tip Summary *(See Client Portal pg. 2)*

ADMIN

- Batch Messages
    - Portal Message
        - Adding Attachments - Fixed

- Event Status / Office Events
    - System Event Status *(Separator)* - Fixed

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FILE INFORMATION

HEADER BAR

- Quick Actions Drop Down Menu
  - Billable Time and Log Hours Added

SIDEBAR

- Show/Hide Sidebar *(Reminder)*

- Events
  - Status "Complete" Highlights in Blue

EVENTS

- Event Pop-up Box
  - Required Account Fields Added *(Account User, Difficulty, Time, and Referral Type)*

- Client Notification Column Moved

TRANSACTIONS

- NEW Tip Transaction Added *(See Client Portal pg. 2)*

- Contactless Credit Card Terminal with Tipping Capabilities - **In Development**

EF DATABASE

- Selected EF Records Highlight in Yellow
- Refund Advance, Refund Amounts, Balance Dues, and Ack Codes Highlight in Yellow, Green or Red