

ATOM SOFTWARE

Utilizing and understanding the Admin section of your ATOM Software Suite is an integral step in customizing ATOM for your office and taking your business practices to the *Next Level*. This manual covers information for Administrator Security Level access Users

*2015 Admin &
Set-up Manual*

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Introduction

ATOM provides the information and procedures needed to revolutionize your office and maximize your performance. The software provides a blueprint for optimizing office workflow, managing appointments, documents, internal communications, tasks, and accounts receivable. ATOM gives you a vision of how to run your office and the infrastructure to make it happen.

Currently **ATOM** is integrated with Drake, TaxWise & Crosslink Software but it can work in tandem with any tax preparation software.

Features

Communications:

Experience enhanced communication across your office(s) with one click access to centralized documents, notes, and contact information. Other features include internal email, task assignment, tracking and routing phone calls, and reminders.

Portal:

We provide digital secure communication options for you and your clients. The Client User portal will allow them to review their tax return and documents online, send additional source documents and messages, schedule an appointment, update their personal information, and review balances or receipts.

Contact Management:

ATOM's efficient contact management system eliminates duplication of contact data entry and automatically updates contact data. Introducing a kiosk or iPad system to your lobby will enhance your client's reception experience, ease congestion during peak hours and provide an efficient way to capture contact data eliminating contact data mistakes or duplication. The check in system will be a useful companion to your reception staff and simultaneously alert professional staff when appointments have arrived.

Document Management:

Reduce your business costs while increasing document storage capacity and security. Your office users can synchronize stored data across multiple devices while organizing documents by business types and return year. Files are available remotely and securely, reducing the cost of office space, and enhancing productivity.

Referral Tracking:

Immediately identify your best referral sources and determine your ROI (Return on Investment). ATOM includes an automated Refer-A-Friend Program that tracks referral sources and generates referral letters and mailing labels.

Cash Receipts and Billing:

ATOM generates a concise breakdown of revenue by processing invoices, recording payments and payment methods, and automatically tracking contact balances.

Punch Clock:

ATOM's automated time clock allows centralized up-to-the minute tracking of employee attendance available at multiple offices and includes functionality to document and track Billable Client hours.

Payroll:

Prepare your office payroll in minutes. ATOM's all-inclusive features mean that you no longer need to transfer employee hours into a separate payroll program. Payroll reports are quick and easy to produce; and your employees have ready access to their wage detail.

Scheduling:

Improve staff utilization by matching return complexity with staff competency. Reduce payroll costs by using historical data to plan for future staffing demands. Online scheduling allows your staff to easily access their work and availability schedules.

Office Events Tracking / Workflow Management:

ATOM's workflow technology eliminates manually moving files throughout the office. Returns and tasks are moved effortlessly with a click of a mouse. The Office Events feature helps tax offices increase productivity and efficiency in processing tax returns and providing exceptional customer service. The increase in productivity enables offices to assume a greater workload, ultimately resulting in increased profitability.

Reports:

ATOM's all-inclusive software application allows you to produce a vast array of management reports which enable you to monitor and improve all aspects of your tax office. Some examples are the Labor/Revenue report, ROI, Referral Types, and Cash Receipts.

Business Types:

Organize all your contacts and businesses within one central database. Set up individual workflows to help streamline your office and transition you towards a paperless office.

Support

ATOM Support Team Hours:

January 1 - April 15

Monday - Friday, 9 A.M. to 9 P.M. EST

Saturday, 10 A.M. to 5 P.M. EST

April 16 - December 31

Monday - Friday, 9 A.M. to 5 P.M. EST

Telephone

877-323-4850

E-mail

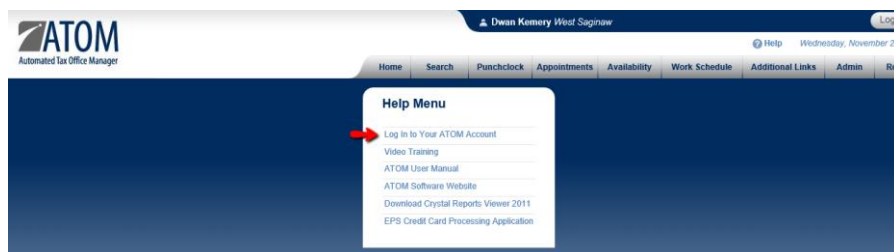
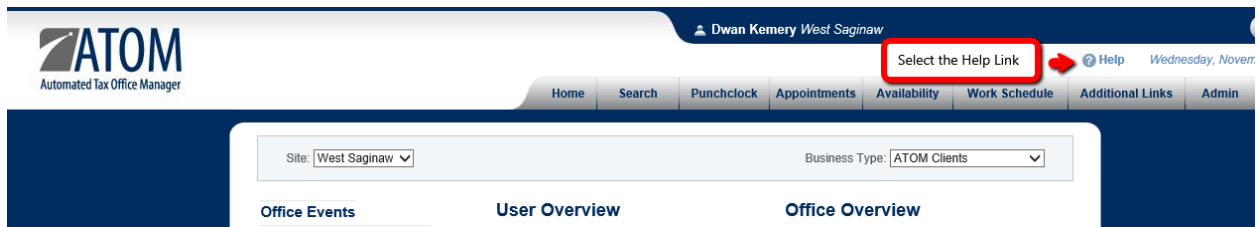
sales@atomanager.com

Fax

(517) 323-4840

ATOM Client Portal

Send us a Portal Message through your account



Getting Started

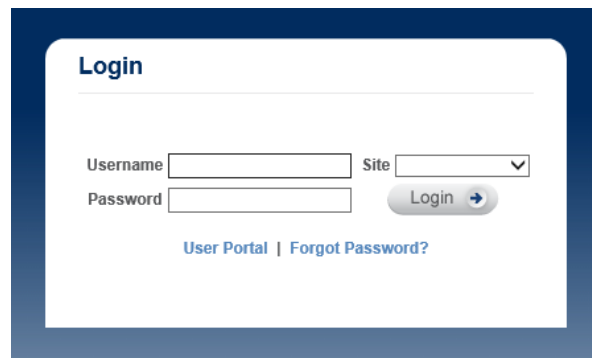
System Requirements

Internet Explorer 8.0 or higher and Internet access (Will work with Internet Explorer 6.0, but the printing capability and the spell checker in the Message Center will be affected).

RAM of 960 MB or higher for Optimum Performance.

Disable the pop-up blockers.

Login



1. Enter your Username
2. Select your Site from the drop-down menu
3. Enter your Password
4. Click on the Login button

NOTE: *The Login is case sensitive. The Password must be a minimum of 8 characters, a mix of upper and lower case letters, and at least one number or special character. The Administrator needs to assign your Username and Password before you can initially login. Once logged in, you can change both your Username and Password.*

** Users will be locked out of ATOM for 15 minutes after 5 failed login attempts for security purposes. If you forget your password or username and select the “Forgot Password” link a system-generated password will be sent to the email address recorded on your User page along with your username.*

*The **User Portal** gives users limited access to view certain things such as assigned tasks, messages, appointments, work schedule, punch clock, and reports. An error message will display if they try to access a restricted area.*

You have logged in using the restricted access User Portal. The page you are trying to view is not available when accessing it through the user portal. Please use the normal login or contact your system administrator.

Login Log

The Employee Login Log report displays the date and time each user logged in or attempted to login to ATOM. In addition, it displays the computer’s IP address of where the login was attempted. This is a very helpful report to ensure employees are only logging in at the office and not at home.

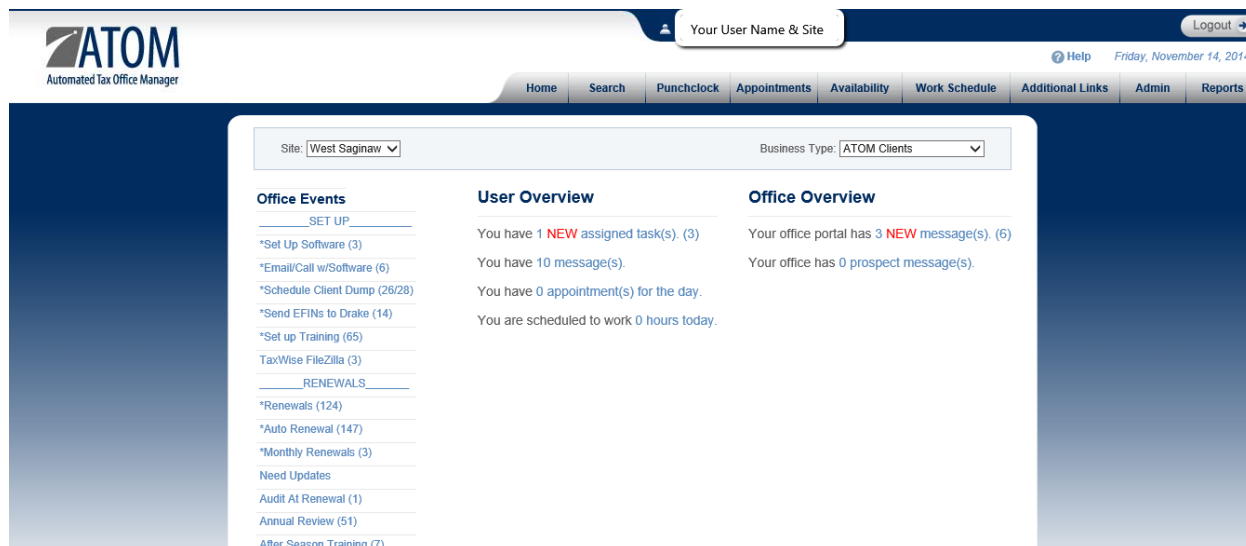
SEE: ATOM > Reports > *Management – Login Log*

NOTE: Usually an office has a unique IP address which rarely changes unless you restart your router. All the computers inside the network of the office will have the same IP address.

05/17/2012 Login Log				
<u>Username</u>	<u>IP Address</u>	<u>Date</u>	<u>Valid</u>	<u>Restricted</u>
Case, Debra	166.249.101.243	5/17/2012 9:08:45AM	X	
	24.11.147.8	5/17/2012 12:22:35PM	X	
	24.11.147.8	5/17/2012 12:51:50PM	X	X
	24.11.147.8	5/17/2012 12:59:30PM	X	X
	24.11.147.8	5/17/2012 1:08:30PM	X	
	24.11.147.8	5/17/2012 1:22:50PM	X	
	24.11.147.8	5/17/2012 1:35:18PM	X	
	24.11.147.8	5/17/2012 1:35:30PM	X	
	24.11.147.8	5/17/2012 1:36:41PM	X	
	24.11.147.8	5/17/2012 1:37:23PM	X	
	mpricco	24.11.147.8	5/17/2012 1:36:20PM	
24.11.147.8		5/17/2012 1:36:24PM		
24.11.147.8		5/17/2012 1:36:31PM		
Murray, Dave	76.97.205.95	5/16/2012 8:52:57AM	X	
	76.97.205.95	5/16/2012 2:22:07PM	X	
	76.97.205.95	5/16/2012 4:32:32PM	X	
Pricco, Mark	24.11.147.8	5/17/2012 1:36:37PM	X	

Home Page

The Home Page (dashboard) screen displays once you have logged in to ATOM. This page is divided into several sections designed for easy navigation within ATOM and provides current information to help manage your office operations.



Reading from top to bottom and left to right the following information is displayed:

- Displayed at the top of the screen is the name of the current ATOM User logged into the software.
- To the far right at the top of the screen is the Logout button used to Log Out of ATOM.
- The next line displays the ATOM Software HELP link and the current date.
- Next are the tabs that organize functionality within ATOM software.
- Next, the Site drop-down box and the Business Type drop-down box are used to navigate between offices and/ or Business Types.
- Next positioned on the left-side are the Office Events (sometimes referred to as workflow management, your to-do list, practice management, etc.).
- Positioned in the middle of the page is the User Overview; here Users (employees) can view important information specific to them.
- To the far right is the Office Overview which details important messages received in the office from your ATOM Portal links.

Working in ATOM

The following icons; are used throughout ATOM and function identically wherever they are displayed.



The **'edit pencil'** is used to add new entries or make changes to the row.



The **'trash can'** icon is used to delete the row.



The **'eye-ball'** icon will allow you to view customer information



The **'plus'** icon will quickly add a new Account year for your client while in Search



The **'red notepad'** icon will quickly link to your client's Task/Notes while in Search.



The **'blue file folder'** icon will quickly link to your client's Account documents while in Search.



The **'yellow mail'** icon will let you compose a Client Portal message for the client while in Search.



The top part of the **'site office name'** icon will open the Appointment Scheduler for this client for the named office/site while the bottom part of the 'calendar' icon will open the Appointment History while in Search.



The **'return year'** icon will quickly open the EF Data information (if applicable) for this client while in Search.



The **'client name'** icon will quickly link to the Client's expanded Contact Information while in Search.



The 'return balance' icon will quickly link to the Client's Transaction Information for that year while in Search.



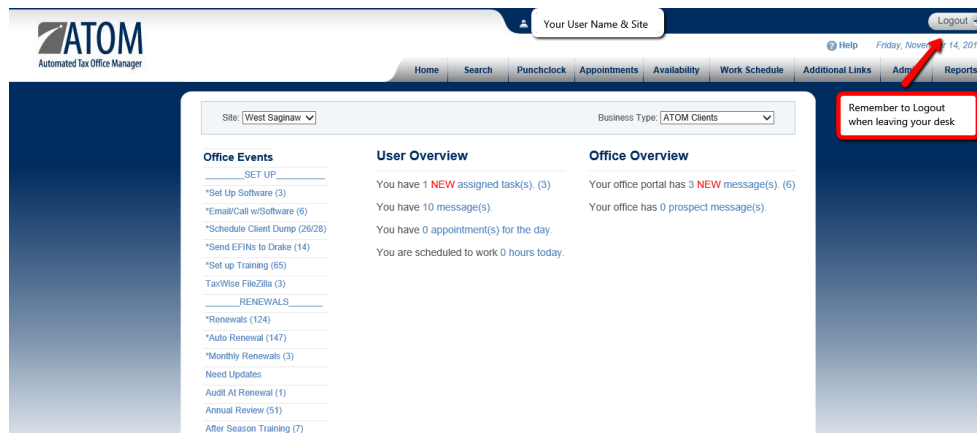
The 'status' icon will quickly link and expand your client's Office Events while in Search.

Note: Fields highlighted in **'blue'** indicate a Hyperlink to the information. Yellow indicates that a client file is incomplete or that there is a permanent note.

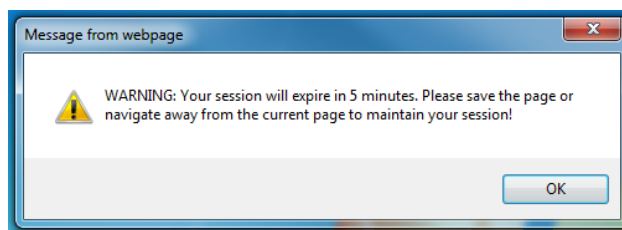
Logout

You should always Logout whenever you leave your Work station for an extended period. If you need to use a computer that is already in use by another person, be sure to log them out first, and then Login using your own Username and Password.

To Logout: Click the Logout button in the upper right-hand corner of the screen



NOTE: You will be automatically logged out after 30 minutes of inactivity however you will receive a warning box 5 minutes prior to being logged out. To avoid being automatically logged out position your cursor in the Lobby Office Event screen. This is the only Event screen that refreshes every minute.



Open Multiple ATOM Windows

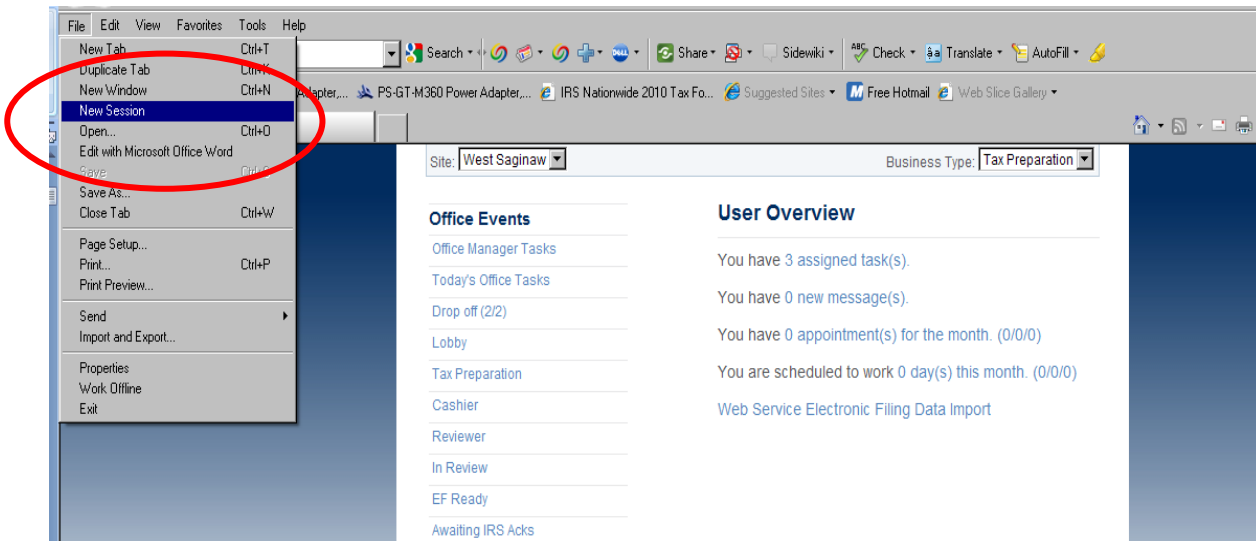
You can open the ATOM Software Program more than once. Each opened program displays on the Task Bar. You should be able to toggle between multiple programs by clicking on each title. This feature will be extremely helpful for the Customer Service Representative (CSR) scheduling appointments.

If this feature does not work:

- Click on the Start button on the Task bar
- Click the Control Panel button
- Click twice on the Internet Options
- Click on the Advanced tab
- Scroll down to Reuse Windows for Launching Shortcuts
- If the box is checked remove the check mark
- Then click on the Apply button

After this change, opening multiple programs at the same time should be possible.

NOTE: *If running Internet explorer 8.0 you will need to open a new session from the File menu and select New Session.*

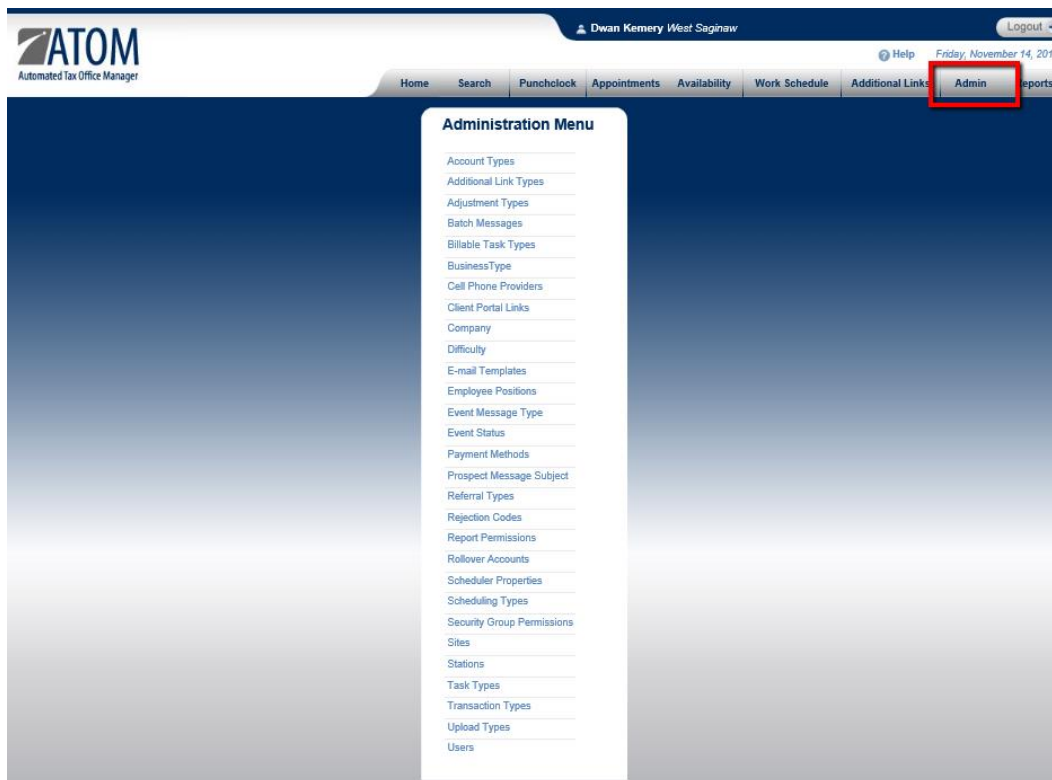


Set-Up

To set up your software you can review and customize all Setup screens listed in the Administration Menu located in the Admin Tab.

NOTE: *To allow the Admin tab to appear the user's security level must be set at Administrator.*

To access the Administration Menu screen: On the Home Page, select the ADMIN Tab.



Account Types

Use the Account Types screen to add a new Account Type or to delete, edit, or make inactive an existing Account Type. The Account Type will display in the Account Information section on the File Information page and several Office Event screens on the Home page.

To access the Account Types screen: Go to **Admin > Account Types**.

Account Types

Business Type: ← **Organize your view by Business Type** **Or view Inactive Records** → Show Inactive Records

		Account Type	Due Date (mm/dd)	Extension (mm/dd)	Inactive	Business Type
		1040	04/15	10/15	<input type="checkbox"/>	All Business Types
		1041	04/15	09/15	<input type="checkbox"/>	All Business Types
		1065	04/15	10/15	<input type="checkbox"/>	All Business Types
		1120	03/15	09/15	<input type="checkbox"/>	All Business Types
		1120S	03/15	09/15	<input type="checkbox"/>	All Business Types
		test			<input type="checkbox"/>	Book Keeping
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	All Business Types <input type="text"/>

Column Descriptions for Account Types


- Account Type** Account Type name.
- Due Date** Due Date for the Account Type in (mm/dd) format if applicable.
- Extension** Extension date for the Account Type in (mm/dd) format if applicable.
- Inactive** If the Account Type is no longer being offered, mark it Inactive rather than deleting the Account Type. This will prevent the inactive Account Type name from appearing in drop-down menus throughout the software.
- Business Type** Designated Business Type associated with the Account Type.













Additional Link Types

Additional Link Types should be set up before adding Additional Links in ATOM. The Additional Link Types will allow you to create new Additional Link Types, delete, edit, or make inactive an existing Additional Link Type. Additional Link Types will help you organize and better utilize your Additional Links in ATOM for quick reference of frequently used documents and links.

To access the Additional Link Types screen: Go to **Admin > Additional Link Types.**

Additional Link Types

Business Type: All Business Types  Organize your view by Business Type Show Inactive Records

		Additional Link Type	Business Type	Inactive
		Employee Documents	All Business Types	<input type="checkbox"/>
		Misc Documents	All Business Types	<input type="checkbox"/>
		Quick Links	All Business Types	<input type="checkbox"/>
		Tax Documents and Forms	Tax Return	<input type="checkbox"/>
		Training Documents	20 Problems	<input type="checkbox"/>
		<input type="text"/>	All Business Types 	<input type="checkbox"/>

Column Descriptions for Additional Link Types

Additional Link Type Description for the Additional Link Type.

Business Type Business Type associated with the Additional Link Type

Inactive If the Additional Link Type is no longer being offered, mark it Inactive rather than deleting. This will prevent the inactive Additional Link name from appearing in drop-down menus throughout the software.

See: Additional Links section for further information

















Adjustment Types

Use the Adjustment Types screen to add, edit, and delete Adjustment Types. The Adjustment Types are displayed in the Transaction Information section within your drop-down menu options and are used to adjust transaction errors or balance accounts while still keeping proper records of your transactions without deleting them.

To access the Adjustment Types screen: Go to **Admin > Adjustment Types.**

Adjustment Types

Show Inactive Records

		Adjustment Type	Inactive
		Balance Out Account	
		Bounced Check	
		Data Entry Error	
		No Charge - First Copy of Return	
		NSF Bank Charge	
		Other	
		Partial Payment	
		Refund Client Fees	
		<input type="text"/>	<input type="checkbox"/>

Column Descriptions for the Adjustment Types

Adjustment Type Name of the Adjustment Type.

NOTE: *The Adjustment Type **Other** cannot be edited, deleted, or made inactive.*

Inactive If the Adjustment Type is no longer being offered, mark it Inactive rather than deleting. This will prevent the inactive Adjustment Type name from appearing in the drop-down menu in the Transaction Information section.

See: Admin > Transaction Types for more information.

Batch Messages

Batch Messages are used to send emails, texts, or portal messages to a selected group of your contacts.

To access the Batch Portal Message screen:

Go to Admin > Batch Portal Messages

Batch Message Options

- Site** Choose the site (office) associated with your message if applicable.
- Business Type** Choose the Business Type associated with your message.
- Bank Product or Non-Bank Product** Choose the Bank Product / Non-Bank Product to send the message.
- Individual / Business** Choose the target group, Individuals or Businesses, to send the message.
- Difficulty** Choose the return Difficulty of your target group to send the message.
- Account Type** Choose the Account Type to send the message.
- Spanish Speaking** Choose if you are sending to Spanish Speaking designated clients.
- Current Status** Choose the Business Type and Event Status associated with your message group.
- Date Received** Choose or enter a received date range (associated with the client files) of your target message group.

Note: Date Received is the date the Account year was created in ATOM so if you are looking to message all return files for 2013 you could potentially use the date range of 01/01/2014-10/15/2014

Message Type Choose which format you wish to send your message as.

Subject Enter a description of the subject of the message to send.

Message This is the body of the message. Information entered here can be formatted using the options above.

Attachment(s) Attachments can be added to your message from browsable computer files when sending a **PORTAL MESSAGE ONLY**. This option is not available for server based email messages.

To Review Sent Messages

Subject	Sent By	Date Sent	Site	Business Type	Bank Product Or Non-Bank Product	From Received Date	To Received Date	Client Type	Difficulty	Return Type	Spanish Speaking	Message Type	# Of Messages
Drake Import into ATOM is Ready	Garcia-Zaragoza, Diana	1/28/2014 1:35:10 PM	All Sites	ATOM Clients	All	3/19/2013 12:00:00 AM	1/24/2014 11:59:00 PM	All	All	Drake		Portal Message	125
Drake Import into ATOM	Prizzo, Mark	1/24/2014 6:52:56 PM	All Sites	ATOM Clients	All	3/19/2013 12:00:00 AM	1/24/2014 11:59:00 PM	All	All	Drake		Portal Message	126

View	Year	Messages
	2014	2
	2013	7
	2012	10
	2011	2

SENT: 12/12/2013 8:43:39 PM
 SENT BY: Murray, Dave
 SUBJECT: Season Greetings
 MESSAGE:

From all the employees at Paula's SavTax we want to *thank you* for your business and hope to see you again in **2014.**

Enjoy the Holiday Season and see you soon!

We value you as our customer!

Paula Varnell, Owner

Billable Task Types

Individual Billing Tasks and rates can be preset to populate the pull down menu when logging billable hours while you are in the Client File or through the Punch Clock. Add, delete, edit or inactivate them by going to Admin > Billable Task Types section of ATOM. These Billing Rates will override the individual User Billable Rates as set in the Admin > Users > Tax/Reporting Information.

To access the Billable Task Type Screen: Go to **Admin > Billable Task Types**

Billable Task Types

Show Inactive Records

		Task Type	Billing Rate	Inactive
		Admin - 1040 assembly	\$0.00	
		Payroll - 941 Preperation	\$30.00	
		Payroll - Sales Tax	\$50.00	
		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

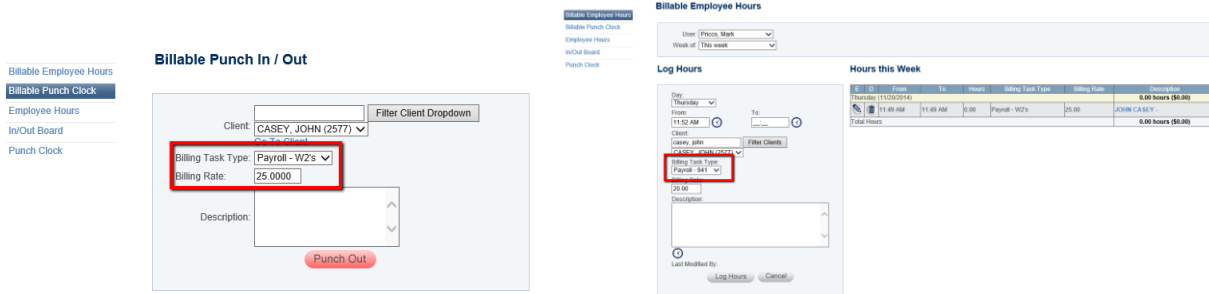
Column Descriptions for Billable Task Type Screen

- Task Type** The name of the task type your office would like to set individual billable rates for.
- Billing Rate** Preset billing rate for individual task types.
- Inactive** Selecting this option will inactivate the billable task and remove them from your current view and is preferable to deleting. Inactive Records can be viewed by selecting the option at the top of the list.

See: Reports > Management – Client Hourly Billing /Punchclock

Account Information

Year <input type="text" value="2013"/>	User <input type="text" value="Check In, Self"/>	Received By <input type="text" value="Prizzo, Mark"/>
Account Type <input type="text" value="1040"/>	Time <input type="text" value="45"/> Minutes	Received Date <input type="text" value="11/19/2014 1:34:00 PM"/>
Difficulty <input type="text" value="****"/>	Site <input type="text" value="West Saginaw"/>	Schedule Type <input type="text" value="Walk-In"/>
Referral <input type="text" value="PY (Prior Year Custor)"/>	Business Type <input type="text" value="Tax Return"/>	Due Date <input type="text" value="4/15/2014 12:00:00 AM"/>
Do Not E-File <input type="checkbox"/>	Retention <input type="text" value="6"/>	Status <input type="text" value="Tax Preparation"/>



Business Types

Creating and utilizing Business Types will help you organize your clientele and work flow. Use the Business Type screen to add, edit, delete, and inactivate Business Types. The Business Types are displayed on the Home page and recorded in the Account Information section of the contact file.

To access the Business Type Screen: Go to **Admin > Business Types**

BusinessType

Show Inactive Records

	Business Type Name	Abbreviation	Display in Appointment Scheduler	Linked to EF Data	Disable Events	Year (If checked it uses calendar year otherwise it uses the return year)	Color Coding	Display only the last four digits of the SSN	Inactive	Don't Display on the Client Portal Events
	20 Training Problems	20								<input checked="" type="checkbox"/>
	Bookkeeping	BK	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Brown			
	Contact	CT			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Purple			<input checked="" type="checkbox"/>
	Financial Planning	Fp	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Silver	<input checked="" type="checkbox"/>		
	Prospect	PR	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>				
	Tax Return	TR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Blue	<input checked="" type="checkbox"/>		
	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Column Descriptions for Business Type Screen

Business Type Name The name of the type of business your office is associated with (i.e. Tax Preparation, Payroll, Insurance, etc.).

NOTE: *The Business Type Contacts can be used to help organize all your business contacts (i.e. landlords, marketing reps., etc.)*

Abbreviation A two-letter abbreviation of the Business Type name. The abbreviation may appear on the Appointment Scheduler next to the contact’s name to help identify the type of appointment.

Display in Appointment Scheduler Check the box if you would like the Business Type Abbreviation to appear next to the contact’s name on the Appointment Scheduler.

Linked to EF Data Check the box if you would like the EF Database task bar to be visible in the contact’s file for a particular Business Type.

NOTE: *This box should only be checked for Business Type – Tax Preparation.*

Disable Events Check the box if you DO NOT want the particular Business Type to have any office events linked or associated with office events.

NOTE: *Most likely you would check this box for the Business Type – Contacts.*

Year If checked, ATOM automatically enters the calendar year (rather than the tax return year) in the Account Information section under the field heading “Account Year.”

Color Coding This allows you to create different color codes for your appointments by business types.

Display only the last four digits of the SSN This allows you to only display the last four digits of the contact’s Social Security number in the Home screen and in the Search Results.

Inactive This will remove the Business Type from your current view while retaining all of the information.

Don’t Display on the Client Portal Events You may wish to remove this business type’s information/data availability in the Client Portal.

Cell Phone Providers

Enable use of cellular provider’s “email to text” feature for client communication by linking your client’s cell phone number and carrier. Standard text messaging rates will apply so it is best to receive a client’s permission to send text messages.

Cell Phone Provider

Show Inactive Records

		Provider	Email Domain (@test.com)	Inactive
		Alltel	@message.alltel.com	<input type="checkbox"/>
		AT&T	@bt.att.net	<input type="checkbox"/>
		Boost Mobile	@myboostmobile.com	<input type="checkbox"/>
		Centennial Wireless	@cwemail.com	<input type="checkbox"/>
		Metro PCS	@mymetroPCS.com	<input type="checkbox"/>
		Nextel	@messaging.nextel.com	<input type="checkbox"/>
		Powertel	@ptel.net	<input type="checkbox"/>
		Sprint	@sprint.com	<input type="checkbox"/>
		Sun Com	@tms.suncom.com	<input type="checkbox"/>
		T-Mobile	@tmomail.net	<input type="checkbox"/>
		US Celular	@email.uscc.net	<input type="checkbox"/>
		Verizon	@vtext.com	<input type="checkbox"/>
		Virgin Mobile	@vmobl.com	<input type="checkbox"/>
		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Column Descriptions for Cell Phone Provider Screen

Provider Cellular Providers can be added or edited as needed. The options listed will appear in your client’s Contact Information section in a selectable drop down menu

File Information

VERBA ANDERSON

Contact Information +[Show Additional Contact Information]

CONTACT INFORMATION

Access Code 000-01-1810 Date of Birth 09/01/1980 Age: 34 Individual/Business Individual

Name (first, middle initial, last, suffix) VERBA ANDERSON

Blocked Spanish Speaking Requested Stop Sending Mailers Password Reset

Email Cell Phone# 5178941001 Stop Sending Emails/Text Cell Phone Provider Sprint

Evening Phone# 5177552003 Day Phone# 5178941405

SPOUSE: Social Security # Date of Birth Age:

Name (first, middle initial, last) Spouse Cell Phone#

Spouse Email Spouse Day Phone#

Spouse Evening Phone# Spouse Fax#

Referrals Save Contact Information Delete Permanent Documents Client Portal Messages Schedule Appointment Appointments Prospect Messages













Email Domain A quick internet search can produce most carrier “email to text” domain addresses so that you can add those commonly used in your area.

Client Portal Links

Use the Client Portal Link to customize the links that the contact will see when they access their Client Portal.

Client Portal Links

Show Inactive Records

	System Name	Custom Name	Ordinal	Inactive	Years to Display	Hide in Mobile Site
	Check the Status of My Tax Return		1		9	
	Client Referrals		2			
	Get a copy of My Tax Returns and Documents		3			
	Add Questions / Notes / Attachments to My File		4			
	Request an Appointment		5			
	Get a Copy of My Invoice and Receipt		6		2	
	Update My Address / Email / Phone Numbers		7			
	Office Events Tracking		8		2	
	Logout		9			
	Upload Documents		10			
	Client Feedback		11			
	Schedule My Appointment		12			

Column Descriptions for Client Portal Link Screen

- System Name** The system will automatically generate these names during you ATOM set up.
- Custom Name** Customized Names entered here will appear in the client portal rather than the System Name.
- Ordinal** The order in which the system or custom name appears in the client portal.
- Inactive** Remove a system/customized option from view by selecting the Inactive feature.
- Years to Display** You may limit the amount of accessibility to account year data.
- Hide in Mobile Site** Selecting will remove this viewing option from the Client Portal when the client is viewing from a mobile device.

See: Client Portal Training Video for more detailed information

Client Portal Link Descriptions/Instructions

Client Portal Main Menu The Main Menu link returns the client to the menu links

Check the Status of My Tax Return Federal and State refund links can be accessed for status checks



Get a Copy of My Tax Return Documents Documents that you have given your client “Access” to will appear here

Get a Copy of My Invoice and Receipt Invoice and statements can be viewed and printed by the client

Upload Documents Clients can upload documents for your view

Send Questions/Notes/ Attachments to my File Client correspondence and replies can be viewed and archived

Client Feedback Your client can send service reviews here that you can add to your own media profiles

Office Events Tracking Your client’s current Event Status will be viewable with this option. All Office Event notes will also display here if you have enabled this function. Notes can be “turned on” in the Company section of the Admin page.



Schedule My Appointment You can allow your clients to schedule their own appointment in real time.

Set and verify your work schedule for employees you wish to allow Client Portal Scheduling for and enable the “Display on Client Portal Schedule Appt. Page” on the Admin>User page for those with verified work schedules whom you wish to allow Client Portal Scheduling

Note: Users with whom “Disregard Work Schedule” have been selected will show as available at the “Start of time scale: __: __” till the “End of time scale: __: __”

- Check the Status of My Tax Return
- Client Referrals
- Get a copy of My Tax Returns and Documents
- Add Questions / Notes / Attachments to My File
- Request an Appointment
- Get a Copy of My Invoice and Receipt (BALANCE: \$0.00)
- Update My Address / Email / Phone Numbers
- Office Events Tracking
- Logout
- Upload Documents
- Client Feedback
- Schedule My Appointment**

Request an Appointment	You can allow your client to Request an appointment that you can then schedule and verify
Client Referrals	Clients can track their RAF (Refer a Friend) history
Update My Address/Email /Phone/Password	Clients can modify their own personal Contact Information for their Client File
Logout	Secure Log Out

Company

Use the Company screen to add, edit, and delete Company Information, Security Information, Federal Unemployment Information, and State Unemployment Information

To access the Company Screen: Go to **Admin > Company**

Company

Field Descriptions for Company Information

Company Name	Your Company Name you would like displayed on your Invoices and Payroll reports.
Address	Your Company’s address that you would like displayed on your Invoices and Payroll reports.
City, State, Zip Code	Your Company’s City, State, and Zip Code that you would like displayed on your Invoices and Payroll reports.
Phone#	Your Company’s phone number that you would like displayed on your Invoices and Payroll reports.

Federal ID # Your Company’s Federal Employee Identification Number (EIN) that you would like displayed on your Payroll reports. You can enter with a hyphen or without.

Processing Fee Bank Product The amount of money your company charges for processing Bank Products. This amount is used to help produce the Labor/Revenue, Referral Types & ROI Reports.

State Unemployment Account Your Company’s State Unemployment Account number you would like to display on your State Unemployment Report.

Refer-A-Friend Amount The amount of money your company pays to reward a contact for referring business to your office. This dollar amount is used in the calculation of some Refer-A-Friend reports.

Uploads Upload Company related documents and letters.

Security Information

Auto-Set the Client Portal Password to the first 15 characters of the last name with the last four digits of the SSN

Block Non-Admin users from modifying the referral type after it has been set.

Disable Email Functionality

Use email for client portal login

Display Notes on the Client Portal Office Events Tracking Screen

Allow Return Status Change Email

Enable Client Portal Information Update Email

Client Portal Login Label (Only applicable when "Use email for client portal" is not checked)


Taxpayer SSN:

Facebook Connection URL for Client Portal

RAL Decline Code Verbiage

Email Disclaimer

Company Website

Save 

Field Descriptions for Security Information

Auto-Set the Contact Portal Password to the first 15 characters of the last name with the last four digits of the SSN

Selecting this option will default a portal password to the first 15 AVAILABLE letters of the client's last Name (with the first letter capitalized) plus the last four the client's Social Security number to when a Client File is created.

Block Non-Admin users from modifying the referral type after it has been set

Non-Admin users will not able to change the referral type for new/returning clients.

Disable Email Functionality

Selecting this option will turn off all ATOM generated emails and texts.

Use email for contact portal login

Selecting this option will require the user to input their email rather than their Social Security number or EIN when logging into to the Client Portal.

Display Notes on the Client Portal Office Events Tracking Screen

ALL office Event notes will display

Allow Return Status Change Email

This will enable emails to alert your clients when their EF Status has changed in their file.

Note: *Use extreme caution when selecting this option as it will generate an email ANYTIME there is an EF Status change in your client's files. (For Drake, Crosslink & TaxWise users)*

Enable Client Portal Information Update Email

Selecting this option will create a Portal Message notifying your office when a client updates their profile or changes their password. **You may wish to turn this option off during the peak tax season so your portal is not inundated with Portal Messages that are just change updates.

Contact Portal Login Label (Only applicable when "Use email for contact portal" is not checked)

Customize the Client Portal Login Label. The Login Label is what the Client sees hen the Login to the Portal.

Facebook Connection URL for Contact Portal

Add your Facebook page link here which will appear as a link on the Client Portal

RAL Decline Code Verbiage

The RAL Decline Codes and Verbiage you would like displayed in the EF Database section. You should be able to copy and paste the codes and verbiage from your RAL bank website or from your tax preparation software.

Email Disclaimer You may wish to add confidentiality disclaimer verbiage to your emails.

Credit Card Instructions

Add credit card payment instructions to the secure credit card payment screen on the Client Portal. On-

ly applicable if processing payments on-line through ATOM & EPS.

Company Website Add your company page address here to appear on the Client Portal and Prospect Message site?

FICA Tax & Federal Unemployment Information

	Calendar Year	Unemployment Wage Limit	Unemployment Rate	FICA Wage Limit	FICA Rate Employee	FICA Rate Employer	
		2007	\$7,000.00	0.01	\$108,200.00	0.062	0.062
		2008	\$7,000.00	0.01	\$108,200.00	0.062	0.062
		2009	\$7,000.00	0.008	\$108,200.00	0.062	0.062
		2010	\$7,000.00	0.008	\$108,200.00	0.062	0.062
		2011	\$7,000.00	0.008	\$108,200.00	0.042	0.062
		2012	\$7,000.00	0.008	\$110,100.00	0.042	0.062
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

FICA Tax & Federal Unemployment Information

*This section only needs to be completed if using ATOM to calculate our company payroll.

Calendar Year The Calendar Year related to your company’s Federal Unemployment tax rate.

Unemployment Wage Limit Your Company’s Federal Unemployment Wage Limit for the year.

Unemployment Rate Your Company’s Federal Unemployment Tax Rate. Record percent as decimals: For example, record 1% as .01.

FICA Wage Limit Enter the National FICA Wage Limit

FICA Rate Employee Enter the National employee FICA rate

FICA Rate Employer Enter the National Employer FICA rate

State Unemployment Information

	Calendar Year	Wage Limit	Unemployment Rate	
		2007	\$9,000.00	0.052
		2008	\$9,000.00	0.037
		2009	\$9,000.00	0.042
		2010	\$9,000.00	0.028
		2011	\$9,000.00	0.024
		2012	\$9,500.00	0.0272
	<input type="text"/>	<input type="text"/>	<input type="text"/>	

State Unemployment Information

*This section only needs to be completed if using ATOM to calculate your company payroll.

Calendar Year The Calendar Year related to your company’s State Unemployment tax rate. At this time, ATOM software **CANNOT** calculate State Unemployment tax for multiple states. The software assumes all wages were earned in the state of record on your Company Information screen.

Wage Limit Your Company’s State Unemployment Wage Limit for the year.

Unemployment Rate Your Company’s State Unemployment Tax Rate. Record percent as decimals:
For example, record 5.2% as .052.

Difficulty

Use the Difficulty screen to add, edit, delete, or make inactive the Difficulty and Preparation Time of a tax return.

To access the Difficulty Screen: Go to **Admin > Difficulty**

Difficulty

Business Type: All Business Types Show Inactive Records

		Difficulty	Time (min)	Inactive	Highlight	Business Type
		N/A	0:00			Bookkeeping
		N/A	0:00			Bookkeeping - My Office
		*	0:30			Tax Preparation
		**	0:30			Tax Preparation
		***	0:30			Tax Preparation
		****	1:30		<input checked="" type="checkbox"/>	Tax Preparation
		*****	2:00		<input checked="" type="checkbox"/>	Tax Preparation
		N/A	0:00		<input checked="" type="checkbox"/>	Tax Preparation
		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	All Business Types <input type="text"/>

Column Descriptions for Difficulty Screen

Business Type Dropdown

You may find it useful to sort by using the drop down menu and selecting a particular business type to organize your screen

Show Inactive Records

Difficulty options you have made inactive will appear here for reinstatement and editing.

Difficulty

This is the level of difficulty of the tax return. A star ranking system can be used to indicate the difficulty level of a tax return: one star indicates easy returns and five stars indicate the most difficult. Difficulty could be ranked by the Account Type: 1040EZ, 1040A, 1040, etc.

Time (min)

The Time indicates the time needed for client appointments and will block the appropriate amount of time when scheduling in ATOM.

NOTE: *The Difficulty ranking and the Time is displayed on the Search Results screen, Office Event screens, Account Information section, and in the Employee Availability, Employee Work, and Contact Appointment Schedules.*

Inactive

Remove a system/customized option from view by selecting the Inactive feature. Inactive files can be accessed later and is preferable to deleting.

Highlight

If the Highlight box is checked then the Difficulty field will highlight in blue indicating that the tax return is difficult.

Business Type You can assign different difficulty ratings and times per Business Type





E-mail / Text Templates

Use the E-mail/Text Templates screen to edit or make inactive existing E-mail/Text Templates. This feature can automatically send an email/text message to your contact on their birthday, as an appointment reminder, or when their file is complete.

To access the Email Templates Screen: Go to **Admin > E-mail Templates**

E-mail Templates

Show Inactive Records

	Type	Subject	Subject Spanish	Body	Body Spanish	Reminder Days	From Date	Business Type	Inactive
	Account - Completed	Account Completed	Cuenta Completa	Thank you for working with X-Tax this year. We appreciate your business and look forward to seeing you next Tax Season!	Gracias por trabajar con X - Tax este año . Apreciamos su negocio y esperamos verlos la próxima temporada de impuestos !	0	1/1/2014	Tax Return	
	Appointment	Appointment Reminder	Recordatorio de Cita	This is a reminder for your appointment with your tax consultant.	Este es un recordatorio de su cita con su especialista en preparacion de impuestos.	-3		Tax Return, Bookkeeping, Financial Planning	
	Birthday - Client	We want to wish you a happy birthday	Queremos desearle un Feliz Cumpleaños	Happy Birthday!!	Feliz Cumpleaños.	0	9/10/2009	Tax Return, Bookkeeping, Financial Planning	
	Birthday - Employee	Happy Birthday		Have a great Birthday		0		Tax Return, Financial Planning	

Column Descriptions for Email/Text Templates Screen

Type The four email Templates Types are static.

Email/Text Template Definitions

- Account Complete** Automatic message generated when the account has been designated Complete (meaning the Office Event is complete for the 1st time) in AT-OM the next day after it has been completed.
- Appointment** Automatic message generated when a client appointment has been scheduled in your ATOM Scheduler.
- Birthday – Client** Automatic message generated for a client’s birthday.
- Birthday – Employee** Automatic message generated for an employee’s (user’s) birthday.

Subject Customize Subject headings to be sent with the particular e-mail.

Body Customize the body of the email here per your company’s marketing strategy.

Body Spanish Translate the body of the email to Spanish and the template messages will be sent to clients whom you’ve designated as Spanish speaking in the Contact Information section of the client’s file.

File Information

Reminder Days

This determines when you want the e-mail to be sent other than the Account Completed email/text.

-1 = Email/Txt will automatically be sent one day before the contact’s birthday or one day before the contact’s appointment.

0 = Email/Txt will be sent on the contact’s birthday or on the contact’s appointment day.

1 = Email/Txt will be sent 1 day after the contact’s birthday or 1 day after the contact’s appointment.

From Date

ATOM Software will send an e-mail/text to every client with a Received Date on or after the date entered in this field. For example, if you used ATOM Software last year and you would like only those clients that returned to your office from the previous year to receive a birthday email enter 1/1/2014 as the From Received Date. *Appointments and Account Completed do not need a date entered here to work.

NOTE: The “Received Date” is recorded in the Account Information section of the contact file. This field is not necessary for the Appointment E-mail Template or the Account Completed message.

Business Type

Select the appropriate Business Type; you must choose one to initiate the automatic message. To select more than one Business Type depress the control key while selecting.

Inactive

To make an E-mail Template inactive simply check the box.

NOTE: An e-mail/text message will not be sent without an e-mail/text address for the Contact in the Contact Information section. A Birthday e-mail/text message will not be sent if a date of birth is not entered in the Contact Information section for both the Contact and spouse. If the

Spouse does not have an email address then the spouse Birthday email will be sent to the Primary email address.

NOTE: All Automatic emails are generated upon the first user sign in to your office ATOM page

Employee Positions

Use the Employee Positions screen to add a new Employee Position, or to delete or edit an existing Employee Position. The Employee Positions will display on the Employee Availability Schedule, Employee Work Schedule, and Punch Clock

To access the Employee Positions Screen: Go to Admin > Employee Positions

Employee Positions

Show Inactive Records

		Position	Display in Appointment Scheduler	Inactive
		Check-in/Cashier		
		General Manager	✓	
		Office Manager	✓	
		Tax Preparer	✓	
		<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Column Descriptions for Employee Positions Screen

- Position** This is the job title for the employee, e.g., office manager, receptionist etc.
- Display in Appointment Scheduler** Selecting this option will display the employee position in the Appointment Schedule in the drop down menu, e.g., not selecting Check-In/Cashier so you don't schedule tax appointments for those employees.
- Inactive** Remove an Employee Position option from view by selecting the Inactive Feature. Inactive files can be accessed later and is preferable to deleting.

Adding New Employee

Positions New positions can be added or edited by using the edit pencil or entering a new position in the blank addition field at the bottom of the list.

Event Message Type

Use the Event Message Type screen to add, edit or inactivate an existing Event Message Type. Event Message Types allow you to quickly track event specific communication for larger groups of clients without having to open each client’s file individually. Event Message Types will appear in a drop down menu for quick access when you are in Event Status groupings selected from the Office Events listed on your ATOM homepage (i.e. Check pick-up, pending)

To access the Event Message Screen: Go to **Admin > Event Message Type**

Event Message Type

Business Type: All Business Types Show Inactive Records

		Message Type	Inactive	Office Events Default	Business Type
		Completed Weekly Payroll			Bookkeeping
		Scheduled Apt			All Business Types
		Sent contact Email			Prospect
		Sent Message		<input checked="" type="checkbox"/>	All Business Types
		Sent Text Message			Tax Return
		Sent TP Email			Tax Return
		Spoke to TP			Tax Return
		<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	All Business Types <input type="checkbox"/>

Column Descriptions for Event Message Type Screen

Message Type The description you would like to appear in the drop-down menus.

Inactive Remove an Event Message Type option from view by selecting the Inactive feature. Inactive files can be accessed later and is preferable to deleting.

Office Event Default Check this box if you would like the Email/Txt Type to automatically pre-fill when selecting the Compose Message button on the Office Event screens. The contact file will then automatically be documented that an Email/Text message was sent in the Message Type field.

Business Type Assign Message Types to appear for Events specific to said Business Type.

Event Status

Use the Event Status screen to add, edit, or inactivate an existing Event Status. The Event Status display on the Home page as Office Events, Events page in the Contact’s file, and in the Status drop-down menu in the Contact’s Account Information section.

To access the Event Status Screen: Go to Admin > Event Status

Event Status

BusinessType: ATOM Clients ← Organize your view by Business Type Show Inactive Records

			System Event Status	Business Type	Customized Event Status	Ordinal	Inactive	Recurrence Days	Notification Days	Highlight	Note Required	Billing Rate	Disable Field Requirement Error Check	Add On Creation of Account
			Lobby	ATOM Clients	____SET UP____	0								
					*Set Up Software	1								✓
					Email/Call w/Software	2								✓
			Drop Off	ATOM Clients	*Schedule Client Dump	3								✓
			Rejects	ATOM Clients	*Send EFINs to Drake	5								✓
			Misc 08	ATOM Clients	*Set up Training	6								✓
			Office Manager Tasks	ATOM Clients	TaxWise FileZilla	7								
			Misc 05	ATOM Clients	____RENEWALS____	8								

Column Descriptions for Event Status Screen

Event Status

Checklist

Selecting the “checklist” icon will create a wip (work in progress) list for a specific event that can be opened and checked off by the user while completing the Office Event. Closing the event without completing required checklists will create a message reminding the User that there are checklists left open.

Event Status

BusinessType: ATOM Clients Show Inactive Records

			System Event Status	Business Type	Customized Event Status	Ordinal	Inactive	Recurrence Days	Notification Days	Highlight	Note Required	Billing Rate	Disable Field Requirement Error Check	Add On Creation of Account
			Lobby		____SET UP____	0								
					Set Up Software	1								✓

Event Status Checklist

[Back to Event Status](#)

	Checklist Item	Ordinal	Required	Assigned To	Due Date (Days from the Start Date)
	Created Client in ATOM (Primary Contact should be entered as spouse)	0	✓		0
	Set-up Account Info Section (Change Account Year, Select Tax Software, Referral Type, etc.)	2	✓		0
	Set-up Office Events (Create Events, Dates, Auto Renewal, etc.)	3	✓		0

Column Descriptions for Event Status Checklist Screen

Checklist Item Detailed description of each section of the checklist

Ordinal The order the checklist items will appear

Required Selecting this option will alert the user if there are open checklist required items but will not prevent them from moving forward.

Assigned To Designated User(s) the Checklist Item to be assigned to

Due Date Days from the Start Date of the event that you wish the assignment to be activated if the Checklist item has not been completed.

Office Events +[Show All Events]

Print Account Event History

Status

Back To File | Go to Office Event

Account Event Checklist SUPERTAX INC.

*Set Up Software (08/29/2014 3:17PM) Organize your view by Account Checklists Save

* Required

Done	Checklist Item	Note	Assigned To	Assigned / Due Date	Date Completed	Completed By	Modified By	Event
<input type="checkbox"/>	Created Client in ATOM (Primary Contact should be entered as spouse)			8/29/2014				Status: *Set Up Software Start Date: 8/29/2014 3:17:53 PM
<input type="checkbox"/>	Set-up Account Info Section (Change Account Year, Select Tax Software, Referral Type, etc.)			8/29/2014				Status: *Set Up Software Start Date: 8/29/2014 3:17:53 PM

Message from webpage

Are you sure you want to close this record that has required checklists open?

OK Cancel

Pre-defined Note Selecting the “note” icon for an Office Event will allow you to enter, edit and save a Pre-defined note for use in the Client File when creating an Office Event for your client records.

Event Status

Business Type: ATOM Clients Show Inactive Records

		System Event Status	Business Type	Customized Event Status	Ordinal	Inactive	Recurrence Days	Notification Days	Highlight	Note Required	Billing Rate	Disable Field Requirement Error Check	Add On Creation of Account
		Lobby		UP	0								
		Renewal Invoice w/ Deadline (Late Fall)		Renewal Invoice w/ Deadline (Late Fall)	1								<input checked="" type="checkbox"/>

Note: A red box highlights the note icon in the System Event Status column for the 'Renewal Invoice w/ Deadline (Late Fall)' row, with an arrow pointing to it and the text 'Add a Predefined Note by selecting the icon'.

Event Status Pre-defined Notes

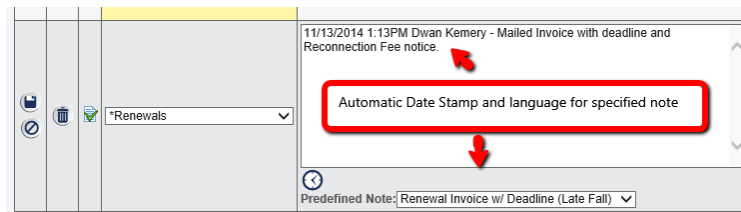
[Back to Event Status](#)

	Description	Predefined Note
	Early Renewal Discount Invoice (Spring)	Mailed Invoice with discount for Early Renewal
	Renewal Invoice w/ Deadline (Late Fall)	Mailed Invoice with deadline and Reconnection Fee notice.
	<input type="text"/>	<input type="text"/>

Column Descriptions for Pre-defined Note Screen

Description Language displayed in the drop down menu of the Office Event

Predefined Note Language displayed and time stamped in body of the Note section of the Office Event



System Event Status System Event Status is a static field because it performs specific functions throughout the software. Editing an event is done in the Customized Event Status field.

Business Type Select the appropriate Business Type from the drop-down menu.

Note: Each Event can be used/customized once per Business Type. So “Misc 01” can appear as a System Even Status and renamed under the Customized Event Status for as many Business Types as needed

Customized Event

Status Use this field to customize the name of the Event Status. The Event name will depend on the particular Business Type.

Ordinal The order the Office Event Status names will appear on the Home page and in the Status drop-down menu in the Account Information section.

NOTE: We recommend organizing your ordinals by 5's or 10's. This will allow you to add/insert new Event Types to your home page Office Events without renumbering the rest. You will also notice some Customized Events have been renamed "_____" for ease of view. The EF Ready event should always appear before Awaiting IRS Acks for Business Type Tax Preparation. The Send button on the EF Ready screen, when selected, moves all contacts to the next available Event screen.

Inactive Remove an Event Status option from view by selecting the Inactive feature. Inactive files can be accessed later and is preferable to deleting.

Recurrence Days If a particular Event [Task] recurs repeatedly, then you can set up a Recurring Event by placing a number in the Recurrence Days field. When a recurring event is complete and an End Date has been logged a new Event will automatically be set for your client with an assigned date of (X) amount of days from the start date, e.g., Weekly Payroll will reoccur 7 days from the start date.

Event Status

BusinessType: Show Inactive Records

			System Event Status	Business Type	Customized Event Status	Ordinal	Inactive	Recurrence Days	Notification Days	Highlight	Note Required	Billing Rate	Disable Field Requirement Error Check	Add On Creation of Account
			Lobby	Bookkeeping A		5								
			Misc - Event Due Date 01	Bookkeeping A	_____	10								
			Bookkeeping - A/P - A/R 1	Bookkeeping A	Weekly Payroll	15		7	-2		<input checked="" type="checkbox"/>	\$45.00		

Notification Days This feature works in conjunction with the Recurrence Months. A number placed in this field will cause a System Message to be sent to the employee recorded as the User in the Account Information section.

-1 = A System Message will be sent to the User 1 day before the Event will recur.

0 = A System Message will be sent to the User the same day the Event recurs.

1 = A System Message will be sent to the User 1 day after the Event recurred.

Highlight This Office Event count will be highlighted in your homepage Office Events

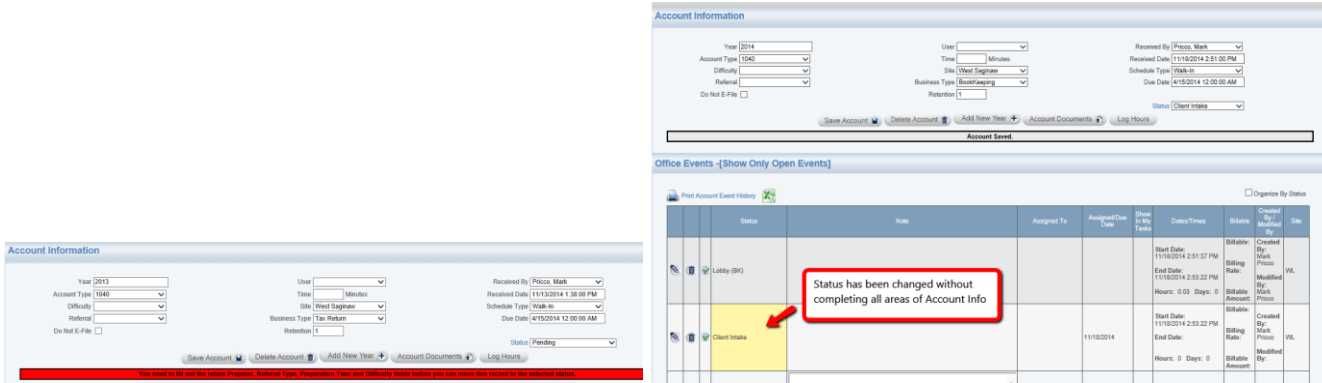
Note Required Selecting this option will request users to leave file notes in the office event and will leave a message in red indicating that a note is required.

Billing Rate Record a billing rate per Office Event. The billing rate will display & calculate in the Office Events section within the Client File.

See: Reports > Management – Client Hourly Billing / Events

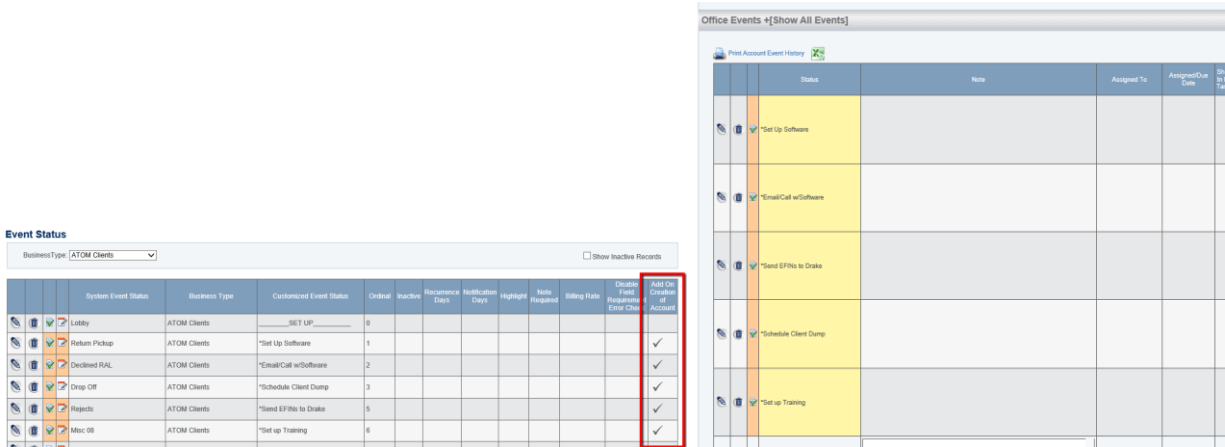
Disable Account Field Requirement Error Check

Account Fields in the Account Information section are required to be completed prior to changing the Event Status; however, this can be disabled per Office Event.



Add on Creation Of Account

Repeated Office Events that are standard can be automatically created when adding new clients or additional account years for current clients.



Payment Methods

Use the Payment Methods screen to edit an existing Payment Method. The Payment Method will display in the Transaction Information section and on the Cash Receipts Report.

To access the Payment Methods Screen: Go to Admin > Payment Methods

Payment Methods

Business Type: <input type="text" value="All Business Types"/>						<input type="checkbox"/> Show Inactive Records
	System Payment Method	Customized Payment Method	Ordinal	Inactive	Business Type	
	Cash	Cash	1		All Business Types	
	Check	Check	5		All Business Types	
	Credit Card	Credit Card	10		All Business Types	
	Other	Other	12		All Business Types	
	RAL	RAL	15		Tax Return	
	RAC	ERC	20		Tax Return	
	RPT	ERD	25		Tax Return	
	E1 Card	E1 Card	30		Tax Return	
		Test Payment Method	35		All Business Types	
		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text" value="All Business Types"/>	

Column Descriptions for Payment Methods

System Payment Method System Payment Method is a static field. There are four non-bank product Payment Methods (Cash, Check, Credit Card, and Other) and four bank product Payment Methods (RAL, ERC, ERD and E1 Card).

NOTE: *The System Payment Methods for bank products should only be used by ATOM contacts using Drake, Crosslink or TaxWise tax preparation software. All clients using other than Drake, Crosslink or TaxWise should make these three System Payment Methods inactive and create three new Customized Payment Methods for bank products.*

Customized Payment Method

Customized Payment Methods names can be edited but not deleted. Customized Payment Methods appear in the Transaction Types drop-down menu in the Transaction Information section of a client’s file.

Ordinal

The order the Payment Method names will appear in the Transaction Type drop-down menu.

Inactive

Remove a Payment Method option from view by selecting the Inactive feature. Inactive files can be accessed later and is preferable to deleting.

Business Type

Designate payments only to be associated with a particular Business Type

Prospect Message Subject

ATOM_XXX/prospectmessage.aspx

The Prospect Message Subjects will display on your prospect message Landing Page.

See: ATOM Training Videos for more detailed information on Prospect Messages

Prospect Message Subject

Show Inactive Records

		Subject	Inactive
		Current Tax Question	
		General Question	
		How much do you charge	
		Where's my Refund	
		<input type="text"/>	<input type="checkbox"/>

Referral Types

Use the Referral Types screen to add, edit or inactivate a Referral Type. The Referral Type names will display in the Referral drop-down menu in the Contact’s Account Information section.

To access the Referral Types Screen: **Go to Admin > Referral Types**

Referral Types

Business Type: All Business Types

Show Inactive Records

		Referral Type	Discount	Inactive	Cost	Business Type
		N/A				All Business Types
		PY (Prior Year Customer)			\$2,500.00	All Business Types
		Employee	\$0.00			Tax Preparation
		Facebook Page	\$20.00			Tax Preparation
		FOX 47	\$20.00		\$9,600.00	Tax Preparation
		Internet	\$20.00			Tax Preparation
		Radio 96.5	\$20.00		\$3,500.00	Tax Preparation
		Refer a Friend	\$20.00		\$20,000.00	Tax Preparation
		Road Sign	\$20.00		\$1,600.00	Tax Preparation
		Val Pak	\$20.00			Tax Preparation
		Yellow Book	\$20.00		\$3,192.00	Tax Preparation
		YellowPages	\$20.00		\$11,100.00	Tax Preparation
		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	All Business Types

Column Descriptions for Referral Types

NOTE: Use extreme caution when deleting. You should never delete a Referral if it is linked to other entries in the software, instead make it inactive. DO NOT delete the Referral named Refer-A-Friend or PY (Prior Year) because they have special features associated with them. You can, however, edit their name or make them inactive.

Referral Type This field contains the name of the Referral. If you are adding a NEW Referral

enter the Referral name in the empty field and click the Save icon.

Discount

This is the amount of discount offered for each Referral. This amount will automatically display as a discount in the Transaction Information when the referral type is selected.

Inactive

If the Referral is no longer being offered, mark it Inactive rather than deleting the Referral. This will prevent the inactive Referral name from appearing on other screens and reports throughout the software.

Cost

Record the annual cost of each Referral promotion (if applicable) in the Cost field. Each year you must update the Cost field with NEW cost data. This field is used to calculate the Return On Investment (ROI) Report.

Business Type

Categorized referral types will only apply and be available for designated Business Types

Rejection Codes

Pertaining to Drake, Crosslink and TaxWise users: Use the Rejection Codes screen to add a new IRS Rejection Code, or to delete or edit an existing IRS Rejection Code. The Rejection Codes will display in the EF Database screen on the Contact Information page and the Reject Office Event screen on the Home page.

To access the Rejection Codes Screen: Go to Admin > Rejection Codes.

Rejection Codes		Rejection Code	Description
		0036	Only one schedule C-EZ allowed for the Taxpayer SSN and one for the Spouse
		0043	Head of Household if you have no qualifying person(s)/dependent(s). To resolve, you should either add a qualifying person/dependent that allows you to file "Head of Household" or change your Filing Status to "Single".
		0046	A maximum of 2 forms 2106 may be present per individual on the return
		0049	2106-EZ Only one form may be present per individual on the return
		0117	Schedule C At least one of these fields must be significant- Gross Receipts/Sales, Gross Income, Total Expenses, Teneative Profit/Loss, Net Profit(Loss)
		0183	Schedule C-If Car/Truck Expensesis significant, then Vehicle Service Date must be significant, of Form 4562 must be present
		0269	Recovery Rebate Credit cannot be claimed because the maximum amount has already been received based on the information contained on the 2007 tax return.
		0370	The child for which you are claiming the Child Tax Credit is ineligible. the child must be under age 17 (age 16) as of 12/31 of the filing year
		0500	Taxpayer SSN & last name do not match IRS records
		0501	The dependents SSN, Last Name or year of Birth does not match IRS records.
		0502	EIN on W-2 is not correct. The IRS attempts to match the EIN to the first four letters of the company name
		0503	Spouse SSN and last name not matching IRS records
		0504	The dependents SSN and Last name does not match IRS records.
		0506	Qualifying SSN of EIC was previously used for the same purpose
		0507	Dependents SSN was already claimed on another return.
		0510	Error in Claiming Personal Exemption. This occurs when a Dep files his/her return and claims a personal exemption after the parents/guardians have already claimed the dependent on their return
		0515	Taxpayers SSN was used as a taxpayer more than once
		0522	Taxpayer DOB does not match IRS records. If the SSN Administration has the wrong DOB on file you will need to file a paper return.
		0523	Spouse DOB does not match IRS records. If the SSN Administration has the wrong DOB on file you will need to file a paper return.
		0529	Declaration Control Number (DCN) of the tax return record ID cannot Duplicate a DCN on a previously accepted electronic return for the current year

Add New Rejection Codes

- From the Rejection Codes screen:
- Enter a new IRS Rejection Code number
- Enter the Description
- Click the Save icon.

If you need to edit or delete a Rejection Code, use the Edit or Delete icons.

Report Permission

Use the Report Permission screen to edit existing Report Permissions and Customized Text that can display at the bottom of the reports. This screen shows which Security Groups can view specific reports.

NOTE: Printable Transaction Statements and Refer-A-Friend page orientation and layout will now accommodate Standard #9 Window Envelopes for mailing.

To access the Report Permission Screen: Go to **Admin > Report Permission.**

Report Permissions

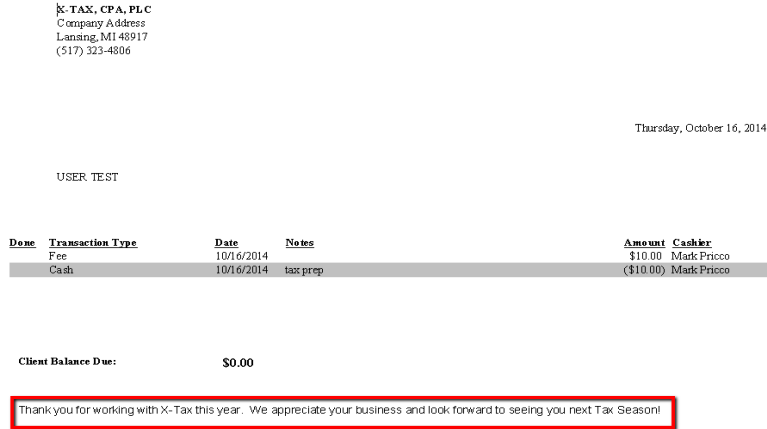
	Report	Security Group	Customized Text
	Bookkeeping - Balance Sheet	Administrator	
	Bookkeeping - Balance Sheet Monthly	Administrator	
	Bookkeeping - Client Balance	Administrator	
	Bookkeeping - Profit and Loss Statement	Administrator	
	Bookkeeping - Transaction Entries	Administrator	
	Bookkeeping - Transaction Types	Administrator	
	Bookkeeping - Transaction Types Summary	Administrator	
	Cash Receipts - Cash Receipts	Administrator, Preparer, Receptionist, Senior Preparer, Office Manager	
	Cash Receipts - Cash Receipts Export	Administrator	
	Client Information - Transaction History	<div style="border: 1px solid gray; padding: 2px;"> Administrator Office Manager Preparer </div>	Thank you for working with X-Tax this year. We appreciate your business and look forward to seeing you next Tax Season!
	Client Portal - Client Contact	Administrator	

Column Descriptions for Report Permissions

Report Report names are static

Security Group Security Group access can be changed by selecting the icon to display the Security Group drop-down menu. Select the appropriate Security Level to view the selected report. To select multiple Security Groups depress the control key and highlight the Security Groups simultaneously, then click the Save Icon.

Customized Text Text can be added to any report and will appear below the report details on pdf generated data. Typically you would utilize this option for Marketing or specific seasonal messages to be added to your Client Printable Transaction History, Balance Due Invoices and Statements, or Referrals and RAF's.



Rollover Accounts

Add a new year of accounts for all selected clients at once.

Note: Please contact the support team for assistance if you choose to use this option.

To access the Rollover Accounts Screen: Go to Admin > Rollover Accounts

Rollover Accounts

Year to copy from:

Year to copy to:

Business Type: -- Select --

Rollover Type: -- Select --

Instructions for Rollover Accounts

- Year to copy from** Enter the year you want to copy
- Year to copy to** Enter the year you want to copy to
- Business Type** Select the Business Type you want to copy

Rollover Type Options

Copy Account Information:

All Client Account information will be (an End Date will be entered.)

Copy Account Information and Open Office Events:

This will close all open events from the source year and reopen them in the destination year. Plus, Account Information will be copied to the destination year.

Copy Account Information and Transactions:

This will include the Account information and Transactions

Copy Account Information Open Office Events and Transactions:

Account Information, open Office Events & Transactions will be copied to the destination year.

Scheduler Properties

Use the Scheduler Properties screen to change how the Employee Availability Schedule, Employee Work Schedule, and Contact Appointment Schedule are displayed. The three schedules are linked together so if you change Scheduler Properties to one schedule you will automatically change the Scheduler Properties for the other two as well.

To access the Scheduler Properties Screen: Go to Admin > Scheduler Properties.

The screenshot displays the 'Appointment Schedule' interface. At the top, there are tabs for 'Key', 'Book Keeping', 'Contact', and 'Tax Return'. A red box highlights a message: 'Enabled Header Column for date with a Horizontal View of the Full time scale'. Below this is a calendar for Friday, 10/17/2014, with a time scale from 9:00 AM to 9:00 PM. On the left, the 'Scheduler Properties' panel is open, showing options for 'Header column for date' (checked), 'Horizontal' view (selected), 'Full time scale' (checked), and 'Time scale interval' set to 30 minutes. The start and end time scales are 9:00 and 21:00 respectively. Below the calendar, there are filters for 'Site' (West Saginaw) and 'Filter By' (All Appointments). At the bottom, there are fields for 'Copy Office/Employee By Date Range' with a dropdown for 'Employee to Copy' and buttons for 'Copy' and 'Clear'.

Column Descriptions for the Scheduler Properties

Header column for date This will include the date above the schedule view rather than just appearing as the highlighted date of the calendar

Horizontal vs Vertical view Set the appearance of the schedule to your personal preference.

Note: *If you need to schedule for multiple preparers during peak tax season you may find a vertical schedule inconvenient as it may require you to scroll through the page to view the entire day.*

Full Time Scale (Disabled) The schedule will display only scheduled appointment times.

Time Scale Interval Set the schedule to display in the time interval of your choice: 15 min., 20 min., 35 min., 60 min., etc.

Start of Time Scale This indicates the time you would like the schedule to begin each day. In the example above, the Start of Time Scale is 9:00 A.M.

End of Time Scale This indicates the time you would like the schedule to end each day. In the example above, the End of Time Scale is 9:00 P.M.

NOTE: *You must use military time to enter the Start Time (9:00) and end time (21:00.) If you want the start time to be 12:00 A.M. then enter 0:01. If you want to show a 24 hour day the end time must be 23:59.*

Include End Time This is mainly a cosmetic choice. If enabled, scheduled appointments will be shown until the very end of the time scale day. If disabled, the schedule will show an extra cell at the end of viewable day though the end time is not included in the schedule.

Include End Time (Enabled)

9:00 PM	5:00 PM	5:30 PM	6:00 PM	6:30 PM	7:00 PM	7:30 PM	8:00 PM	8:30 PM	9:00 PM
---------	---------	---------	---------	---------	---------	---------	---------	---------	---------

Include End Time (Disabled)

9:00 PM	4:00 PM	4:30 PM	5:00 PM	5:30 PM	6:00 PM	6:30 PM	7:00 PM	7:30 PM	8:00 PM	8:30 PM	9:00 PM
---------	---------	---------	---------	---------	---------	---------	---------	---------	---------	---------	---------

Value Marks

This is another cosmetic choice. If enabled, separation lines will appear on the time schedule.

Value Marks (Enabled)

9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM
---------	---------	----------	----------	----------	----------	----------	----------	---------	---------	---------

Value Marks (Disabled)

9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM
---------	---------	----------	----------	----------	----------	----------	----------	---------	---------	---------

Scheduling Types

Scheduling Types display on the Search Results page and the Account Information Section. They are used to identify the clients scheduling properties, e.g., appointments, walk-ins, etc.

To access the Scheduling Types Screen: Go to **Admin > Scheduling Types**.

Scheduling Types

Business Type: All Business Types Show Inactive Records

		Scheduling Type	Inactive	Business Type
		N/A		All Business Types
		Insurance Consultation		Health Insurance
		Appointment		Tax Preparation
		Drop-Off		Tax Preparation
		Walk-In		Tax Preparation
		<input type="text"/>	<input type="checkbox"/>	All Business Types

Account Information

Year: 2013 | User: Case, Debra | Received By: Check In, Self

Account Type: 1040 | Time: 30 Minutes | Received Date: 4/15/2014 2:01:00 PM

Difficulty: ** | Site: Jackson | Schedule Type: Appointment

Referral: PY (Prior Year Custor) | Business Type: Tax Preparation | Due Date: 10/15/2014 12:00:00 AM

Do Not E-File: | Retention: 2 | Status: Pending - Extension Filed

Buttons: Save Account, Delete Account, Add New Year, Account Documents, Log Hours

Column Descriptions for Scheduling Types

Scheduling Type

Create and edit specific Scheduling Types required for your business and reporting needs

Inactive

Remove a Scheduling Type option from view by selecting the Inactive feature. Inactive files can be accessed later and is preferable to deleting.

Business Type

Designate a specific Scheduling Type to be associated with a Business Type.






Note: That “Appointment” and “Drop-Off” are static Scheduling Types which are linked to the programing fields needed for scheduling and adding new clients. They can be edited in the Account information section in the Client File once they have been entered in ATOM.

Security Group Permissions

This screen is used to edit Security Group Permissions.

To access the Security Group Permissions Screen: Go to Admin > Security Group Permissions

Security Group

	Security Group	Allow EF Data Viewing	Allow Account Upload / Viewing	Allow EF Data Import	Hide Office Events Client Balance Summary Total
	Administrator	✓	✓	✓	
	Office Manager			✓	
	Preparer				
	Receptionist				
	Senior Preparer				

Column Descriptions for Security Group Screen

Security Group Security Groups are static and an employee’s Security Group is set by your office Administrators.

SEE: ADMIN User’s page for a detailed description of each Security Group.

Allow EF Data Viewing For Drake and Crosslink users only: Employees within the listed security group assignments will not have access to the EF Data File Information unless access has been given by selecting this option for that group. Those without access will not see the EF Data title bar within the Client File.

Allow Account Upload/ Viewing Employees within the listed security group assignments will not be able to view or upload Account Documents within the Client File unless access has been given by selecting this option for that group. Those without access will not see the Account Documents button appear in the Account Information of the Client File unless the employee is he assigned user designated in the Account Information section.

Allow EF Data Import For Drake and Crosslink users only: Employees within the listed security group assignments will not be able to import EF Data (on the homepage or in individual client files unless access has been given by selecting this option for that group. Those without access will not see the “Drake/Crosslink Web Service Electronic Filing Data Import” link on their hope page under their Office Overview or the “Import the most current Drake EF Data for this client” link within the Client File EF Database section.

Office Overview

Your office portal has 1 NEW message(s). (1)

Your office has 2 prospect message(s).

Drake Web Service Electronic Filing Data Import

EF Database

Import the most current Drake EF Data for this client

View	Fed. Ack. Date	Fed. Ack. Code	Sta
	0205	R	
	0204	R	
		P	

*This is the IRS projected date. For the most current refund status please :

Hide Office Events Contact Balance Summary Total

A quick accounting overview of your office and daily totals is available in Balance Summary Total of each Office Even listed on your home page. This balance will only be available to those whom you have given access and typically utilized by administrators only.

Office Events

Site: Jackson Business Type: Tax Preparation Year: ALL View Date: 10/16/2014

Today's Office Tasks

Office Manager Tasks

Lobby

Drop Off (Unassigned)

Tax Preparation

Cashier

Reviewer

In Review

EF Ready

Awaiting IRS Acks

Waiting on IRS to Fund Bk (2)

Rejects (2)

Pending - My To-Do List

Pending - Client (9)

Pending - Extension Filed (1)

Waiting on IRS to Fund Bk

Key ■ Review File ■ Credit Balance ■ Balance Due ■ Difficult ■ Blocked ■ Long Wait-Time ■ Spanish Speaking ■ Open Required Checklist(s) (R) Requested

	Access Code	Year	Name	Status	Notes	Payment Method	Debt Code	Day (s)	Refund Method	Check Date	Expected Check Date	Check Status	Email/Txt
<input type="checkbox"/>	000011297	2013	FRIEBEL, FREDERICK	Waiting on IRS to Fund Bk		E1 Card		260	E1 Card		02/18/2014		
<input type="checkbox"/>	000020408	2013	PLEDGER, TERRICA	Waiting on IRS to Fund Bk		Credit Card		253	ERC		02/26/2014		

Move To: Go

Send to Check Pick-up Send to Complete Compose Email/TXT Compose Portal Message Remove From List

Files with the Event Status "Waiting on IRS to Fund Bk" were selected from the home page

The Total Balance Summary viewable to those with access




# 02/18/2014 -	1
# 02/26/2014 -	1
# of Returns -	2
Total Balance	\$205.00

Sites

Use the Site screen to edit an existing office Site. The sites appear in the Sites drop-down menu on the Login Page, in the Contact’s Account Information section, on the schedules, and on the Office Event screens.

To access the Sites Screen: Go to Admin > Sites

Sites

	Site Name	Abbreviation	EFIN #	EFIN Password	Hour Difference From Eastern Standard Time (EST)	State Refund Link	EF Data System	Company Name Override	Address	Phone
	Jackson	JC	100001	Hello		https://treas-secure.treas.state.mi.us/eservice_enu/start.swe?SWECmd=Start&SWEHo=treas-secure.treas.state.mi.us	Drake		1301 N West Ave Jackson, MI 49202	517-796-2065
	South Cedar	SC	100002	HiThere		https://treas-secure.treas.state.mi.us/eservice_enu/start.swe?SWECmd=Start&SWEHo=treas-secure.treas.state.mi.us	Drake		5525 S Cedar St Lansing, MI 48911	517-394-3039
	West Saginaw	WS	100003	Goodmorning		https://treas-secure.treas.state.mi.us/eservice_enu/start.swe?SWECmd=Start&SWEHo=treas-secure.treas.state.mi.us	Drake			

NOTE: *If you close an office site and would like to remove it, contact the ATOM support team for assistance. If you need to add any additional sites after your initial purchase, please contact the ATOM support team for pricing.*

Column Descriptions for Sites

- Site Name** Customize the site name. Typically a site name is based on the office location (i.e. city name, street name, etc.).
- Abbreviation** Enter a two-character abbreviation of the Site Name. The two-letter abbreviation is displayed on the Employee Availability Schedule and various Scheduler reports.
- EFIN #** Drake and Crosslink clients should enter your tax office’s EFIN # associated with the designated site.
- EFIN Password** Enter your EFIN password assigned to you by Drake Software. The password can be found on your shipping label and is the password you use to log into <https://support.drakesoftware.com/site/Login.aspx> For Crosslink users enter your Transmitter password. Contact Crosslink support for assistance.
- Hour Difference from Eastern Standard Time (EST)** Enter the Hour Difference From Eastern Standard Time (EST). For example, if your office were located in California you would enter -3 because California is on Pacific Standard Time which is three hours behind the east coast. If your office is located in the EST zone then leave the field blank and it will default to zero.
- State Refund Link** Enter the State Refund Link for the designated site. The State Refund Link is displayed in the Contact’s EF Database section and Client Portal. This is very helpful

when the contact calls asking, “Where is my state refund?”

EF Data System **Drake and Crosslink users should see “Drake or Crosslink”** appear in this column for proper EF Data importing. Please contact ATOM Support if you do not see this and you are a Drake or Crosslink user.

Company Name Override for Address and Phone

Your company’s information, sourced from the Company section of Admin, will appear on invoices and printable transactions. You may override that information by the entering information in these fields. This will be useful for companies with more than one site/office as they may want to override the Source/Main company’s information and enter site specific information to print on Client’s transactions and invoices.

Stations

Use the Stations screen to add a new office workstation or to delete/edit an existing office workstation. The Stations will display on the Punch Clock screen and the In/Out Board.

Note: *Offices with seasonal employees and unassigned desks may find this feature more useful than others as they allow any user to track where an employee is for the day and at which number to contact them.*

To access the Stations Screen: Go to Admin > Stations.

Stations Show Inactive Records

Station	Phone	Site	Inactive
Front Counter	517-974-3644	Jackson	
Window Side - Desk 1 close to counter	517-974-3644	Jackson	
Window Side - Desk 2 close to bathroom	517-974-3644	Jackson	
CASHIER	323-4806 X235	West Saginaw	
CHECK-IN	323-4806 X236	West Saginaw	
RECEPTION 1	323-4806 X225	West Saginaw	
RECEPTION 2	323-4806 X233	West Saginaw	
RECEPTION 3	323-4806 X230	West Saginaw	
RECEPTION 4 (MARK)	323-4806 X228	West Saginaw	
RECEPTION 5 (BREAK ROOM)	323-806 X231	West Saginaw	
RECEPTION 6 (BREAK ROOM)	323-4806 X239	West Saginaw	
RECEPTION 7 (BREAK ROOM)	none	West Saginaw	
STATION 1	323-4806 X227	West Saginaw	
STATION 2	323-4806 X241	West Saginaw	
STATION 3	323-4806 X238	West Saginaw	
STATION 4	323-4806 X226	West Saginaw	
STATION 5	323-4806 X224	West Saginaw	
STATION 6	323-4806 X232	West Saginaw	
STATION 7	323-4806 X240	West Saginaw	
STATION 8	no phone	West Saginaw	

Column Descriptions for the Stations

Station The name of your office workstation to be displayed as a selection in the Punch Clock and on the In/Out Board. Typically office workstations are named by their physical location such as “Reception” but can be assigned per the needs of your office. To add a new Station enter the new Station’s name, phone number, and site in the empty fields and click the Save icon.

- Phone** The office workstation’s phone number which will appear on the In/Out Board.
- Site** The office workstation’s site location which will appear on the In/Out Board.
- Inactive** Inactivate a Station when you are no longer using it for the tax season. This will remove it as a punch clock selection and will no longer display on the In/Out board. Inactive stations can be accessed later and is preferable to deleting.

Task Types

Use the Task Types screen to add a new Task Type, delete, edit, or make inactive an existing Task Type. The Task Type names will appear in the Task Types drop-down menu in the Client File’s Task/Notes information section.

To access the Task Types Screen: Go to Admin > Task Types

Task Types

BusinessType: All Business Types Show Inactive Records

Organize your view by selecting a Business Type

		Task Type	Inactive	Event Status Link	Business Type	Confidential	User Task Type	Note Required
		CPE Classes			All Business Types		<input checked="" type="checkbox"/>	
		Predefined Notes per Task Type option			All Business Types		<input checked="" type="checkbox"/>	
		General			All Business Types			<input checked="" type="checkbox"/>
		OJT Checklist			All Business Types		<input checked="" type="checkbox"/>	
		Phone Message			All Business Types			<input checked="" type="checkbox"/>
		PTIN Login			All Business Types		<input checked="" type="checkbox"/>	
		NOTARY CLIENT			Office Information			
		Complaints			Tax Preparation			<input checked="" type="checkbox"/>
		Confidential Note			Tax Preparation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		EIC Check List			Tax Preparation		<input checked="" type="checkbox"/>	
		Tax Planning / Question			Tax Preparation			
		Confidential Note			Tax School	<input checked="" type="checkbox"/>		

Column Descriptions for the Task Types

Pre-defined Note Selecting the “note” icon will for a Task Type will allow you to enter, edit and save a Pre-defined note for use in the Client File when creating a Task/Note for your client records.

Task Types

BusinessType: All Business Types Show Inactive Records

		Task Type	Inactive	Event Status Link	Business Type	Confidential	User Task Type	Note Required
		CPE Classes			All Business Types		<input checked="" type="checkbox"/>	
		General			All Business Types		<input checked="" type="checkbox"/>	
		General			All Business Types			<input checked="" type="checkbox"/>
		Selected the Task Type you wish to create a Pre-defined note for by double clicking on the "Note" icon			All Business Types		<input checked="" type="checkbox"/>	
		Phone Message			All Business Types			<input checked="" type="checkbox"/>

Task Types Pre-defined Notes

Back to Task Types

Description	Predefined Note
Call Client Back	Client called and asked to speak with you directly, please call them back.
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Enter, edit and save your Pre-defined Note Description and Language</div>	

Task / Notes Information

Print Task History Organize

Done	Task	Note	Creation Date	Assigned Date	Completed Date	Created By	Completed By	Modified By	Ass
<input checked="" type="checkbox"/>	General	04/01/2014 12:02:48 PM Eric Sandelin - Please file extension. 04/01/2014 01:42:39 PM Mark Pricco - done	4/1/2014 12:03:24 PM	4/1/2014	4/1/2014 1:42:38 PM	Sandelin, Eric	Pricco, Mark	Kemery, Dwan	Sandelin,
<input checked="" type="checkbox"/>	General	04/01/2014 06:14:44 PM Dwan Kemery - Client called and wants to come in tomorrow morning but also wants a copy of the paperwork. I didn't see anything in the docs and wasn't sure where it would be in Drake. Can you upload it so I can print it when he comes in?							
<input checked="" type="checkbox"/>	General	04/09/2014 10:18:10 AM Eric Sandelin - The Whites will be in sometime this summer to effle MI	4/9/2014 10:18:47 AM	4/9/2014	6/18/2014 1:36:12 PM	Sandelin, Eric	Kemery, Dwan	Kemery, Dwan	
<input type="checkbox"/>	Phone Message	10/17/2014 12:34 PM Mark Pricco - Client called and asked to speak with you directly, please call them back.							Berglanc Check In Cleary, J Garcia-Z Kemery, Mogoler Not, Ass Pricco, C Pricco, M

Time Stamped language automatically fills

Selected Pre-defined Note

Predefined Note: Call Client Back

Task Type Task Type or Note categories can be added, deleted or edited for your office use.

Note: Task Type "General" is a static field and is needed for programing use and cannot be deleted.

Inactive Never delete a Task Type that is already linked to other entries in the software; instead change its status to inactive by inserting a check mark in the Inactive box. Inactive Task Types will not appear in the Task Type drop-down menu in the Contact's Task/Notes information section.

Event Status Link *This field is no longer in use and is a carryover from previous versions of ATOM Software. Please disregard this column.

Business Type "All Business Types" is the default Task Type and will display for all Tasks/Notes in the drop-down menu. You can customize Task Types to only appear as an option for designated Business Types.

Confidential When a Task Type has been selected as Confidential the Task Type and note will only appear to users viewing the Client File/or User File who have an Administrator Security Group designation.

User Task Type User Task Types are only available as Task Type options in the pull down menus of the USER (Employee) file.

Upload Types

Users

Display Expanded Client Information Section

Display Collapsed Other Accounts Section

Restrict User Access to only his/her Default Site

Last Modified On 1/2/2014 5:25:13 PM

Save

User section of the ADMIN page in ATOM within an employee's personal file.

/ Notes Information

Done	Task	Note	Creation Date	Due Date	Completed Date	Created By	Completed By	Modified By	Assigned To
	CPE Classes	10/17/2014 12:20:07 PM Mark Pricco - November 14	10/17/2014 12:18:30 PM	10/17/2014		Pricco, Mark		Pricco, Mark	
	OJT Checklist	10/17/2014 12:20:20 PM Mark Pricco - completed and imaged	10/17/2014 12:18:42 PM	10/17/2014		Pricco, Mark		Pricco, Mark	
	PTIN Login	1234	10/17/2014 12:18:57 PM	10/17/2014		Pricco, Mark		Pricco, Mark	

Note Required Selecting this option will require the user who enters this specific Task Type to leave a time stamped note in the Client File.

Transaction Types

Use the Transaction Types screen to add a new Transaction Type or to delete, edit, or to make inactive an existing Transaction Type. The Transaction Type names appear in the Transaction Type drop-down menu in the Contact's Transaction Information.

To access the Transaction Types Screen: Go to Admin > Transaction Types.

Transaction Types

Business Type: Tax Preparation Show Inactive Records

Customized Transaction Type	Category	Inactive	Ordinal	Date	Mark As Done	Fee (DR)	Default Fee	Payment (CR)	Discount	Default Discount	Payment Method	Default Payment Method	Adjustment Type	Adjustment Type Method	Note Required	Business Type	Transaction Type Grouping	Recursive Days
	Fee		0													Tax Preparation		
Fee - Tax Prep - (CY)	Fee		5		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>										Tax Preparation		
Fee - State Only	Fee		9		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$65.00									Tax Preparation		
Fee - Dependent of Another	Fee		10		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$25.00								<input checked="" type="checkbox"/>	Tax Preparation		
Fee - Copy of Return	Fee		12		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$5.00									Tax Preparation		
Fee - Amendment	Fee		20		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$65.00								<input checked="" type="checkbox"/>	Tax Preparation		
Fee - Extension Only	Fee		25		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$20.00									Tax Preparation		
Fee - Consultation / Walked	Fee		30		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$20.00									Tax Preparation		
Payment - RAL	Payment		34		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	RAL				Tax Preparation		
Fee - Tax Prep - (PY)	Fee		40		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>										Tax Preparation		
Fee - Other	Fee		45		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									<input checked="" type="checkbox"/>	Tax Preparation		
	Fee		50													Tax Preparation		
Payment - Cash	Payment		51		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Cash				Tax Preparation		

Column Descriptions for the Transaction Types

Customized Transaction Type Customized Transaction Type names can be added and edited but cannot be deleted. Use the blank field to add a NEW Customized Transac-

	tion Type.
Category	Choose the appropriate transaction Category for Transaction Type
Inactive	Never delete a Transaction Type if it is linked to other entries in the software rather remove a Transaction Type from view by selecting the Inactive feature. Inactive files can be accessed later and is preferable to deleting.
Ordinal	The order the Transaction Type names will appear in the Transaction Type drop-down menu when logging a transaction in the Client File. You may wish to order by increments of 5 so new transactions can be added without the need to reorder the entire list.
Date	Selecting this option will open the date field for the particular transaction.
Mark As Done	Selecting this option will mark all transactions as “Done.” This is the preferred method unless you plan to send multiple invoices during the year.
Fee (DR)	Selecting this option will open the Fee field for the particular transaction.
Default Fee	Set a Default Fee for the particular transaction.
Payment (CR)	Selecting this option will open the payment field for the particular transaction.
Discount	Selection this option opens the discount field.
Default Discount	Set a Default Discount amount for the particular transaction.
Payment Method	Selecting this will open the payment field.
Default Payment Method	Set a default payment method for the particular transaction.
Adjustment Type	Selecting this will open the Adjustment Type field.
Adjustment Type Method	Set a Default Adjustment Type method for the transaction.
Note Required	Selecting this option will require your users to add a note to the Transaction entry.
Business Type	Designate transactions by the associated Business Type.
Transaction Type Grouping	Designate a Type Grouping to use for your personal business records when using ATOM for your company’s accounting and bookkeeping
Recursive Days	Set a reoccurring transaction by setting the days which the transaction should post. Enter in days how often you would like this transaction to reoccur, e.g., every 7 days, 14 days, etc.

Note: Frequently used Reports concerning Transaction Types will include Reports>Cash Receipts – Cash Receipts to reconcile your accounts for the day/week/mth and Management – Balance Due Statement & Invoice for client billing.

Upload Types

Use the Upload Types screen to add a new Upload Type or to delete, edit, or to make inactive an existing Upload Type. The Upload Types appear in the Permanent Documents, Account Documents, Company Uploads and User Uploads.

To access the Upload Types Screen: Go to **Admin > Upload Types.**

Upload Types

BusinessType: All Business Types Show Inactive Records

Organize by Business Type

	Upload Type	Upload Type Category	Inactive	Business Type	Required	Confidential
	Client Uploads	Contact Upload	<input type="checkbox"/>	All Business Types	<input type="checkbox"/>	<input type="checkbox"/>
	ID - SPOUSE	Contact Upload	<input type="checkbox"/>	All Business Types	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	ID - TAXPAYER	Contact Upload	<input type="checkbox"/>	All Business Types	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	OTHER	Contact Upload	<input type="checkbox"/>	All Business Types	<input type="checkbox"/>	<input type="checkbox"/>
	SOCIAL SECURITY CARDS	Contact Upload	<input type="checkbox"/>	All Business Types	<input type="checkbox"/>	<input type="checkbox"/>
	CHECK STUB	Account Upload	<input type="checkbox"/>	Tax Preparation	<input type="checkbox"/>	<input type="checkbox"/>
	CREDIT CARD RECEIPT	Account Upload	<input type="checkbox"/>	Tax Preparation	<input type="checkbox"/>	<input type="checkbox"/>
	IRS NOTICES	Account Upload	<input type="checkbox"/>	Tax Preparation	<input type="checkbox"/>	<input type="checkbox"/>
	REVIEWER DOCS - (W-2, 1099-R, 1099-G, etc.)	Account Upload	<input type="checkbox"/>	Tax Preparation	<input type="checkbox"/>	<input type="checkbox"/>
	SIGNATURE DOCS - (RAL INFO, BANK APP, 8879)	Account Upload	<input type="checkbox"/>	Tax Preparation	<input type="checkbox"/>	<input type="checkbox"/>
	TAX RETURN	Account Upload	<input type="checkbox"/>	Tax Preparation	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	All Business Types	<input type="checkbox"/>	<input type="checkbox"/>

Column Description for Upload Types

Upload Type Customize the name of the upload as you would like it to appear in the Upload Type drop-down menus located on the Permanent Documents, Account Documents, Company Upload, and User Upload pages.

NOTE: Upload Types ID–Taxpayer and ID–Spouse cannot be edited or deleted because they trigger functionality throughout the software.

Upload Type Category Designate the Upload Type by its category (how it’s attached to a client’s file.)

Upload Type Category Definitions

Contact Uploads	Found in the Contact Info Section of the Client File labeled Permanent Documents.
Account Uploads	Found in the Account Info section of the Client File.
Company Uploads	Found in the Company section of Admin page and are specific to your documents that need an ATOM source link when using Additional Links to access things like Company Letterhead, Intake forms, Schedule C documentation or IRS Due Diligence proof.
User Uploads	Found in the User section of the Admin page and are specific to your employees and are typically reserved for your own Human Resource documents for said employee.

Inactive	Check the Inactive box if you no longer want the Upload Type to appear in the Upload Type drop-down menus. You will not be able to delete the Upload Type if it is linked to one or more records.
Business Types	Match the Business Type with its Upload Type name. If All Business Types is selected then that particular Upload Type will display for all upload in the drop-down menu.
Required	This feature is linked to the Self-Check In Screen. If required & the upload is not in the file the client will be asked to see the receptionist after checking in.
Confidential	Selecting an upload as “Confidential” will hide that upload, as well as the option to select it, from all other users but Administrators.

Users

The User section allows you to add, delete, edit, or upload User Personal Information, Tax Information, or Family Information. All employees who will use your ATOM software suite should be entered as a user.

NOTE: *Before a User’s name will appear in report drop-down menus, a Begin and End Date must be entered in the User’s Tax Information section. Before a User can link billable and non-billable hours to a particular contact, a Billing Rate must be entered in the User’s Tax Information section unless the User’s security level is Administrator.*

Personal Information

Before a User can access the software, the Administrator must complete all fields marked with an asterisk within the User’s Personal Information screen. To access the Admin User Personal information screen go to **Admin > Users > View**.

User Search

Name (First, Last):

Security Group:

Site:

Preparer Number:

Show Inactive Records:

Users

<input type="checkbox"/>	Last Name	First Name	Security Group	Home Phone	Work Phone	Cell Phone	Office Phone	Preparer Number	PTIN	RBIN	CPE	Email	Site
<input type="checkbox"/>	ARMSTRONG	DEANNA	Preparer		517-694-1374	517-899-0000		jkgkjhlkj				X	West Saginaw

From the User screen, click the Add New User button if you are adding a new User or click on the Eye icon link if you are viewing, deleting, or uploading the User’s Personal Information

Personal Information

Name* (first, middle initial, last)

User name*

Social Security #

Gender

Marital Status

Site*

Experience*

Address

City, State, Zip Code

Home Phone

Cell Phone

Email*

PTIN

RBIN

Password*

Goes By

Date Of Birth

Start Date

Security Group*

Default Business Type*

Individual/Business*

Default Account Type*

Work Phone

Office Phone

Preparer #

CPE

MISC

Column Descriptions for Personal Information

- * **Name** The User’s first, middle initial and last name.
- * **User Name** The User Name can be up to 25 alphanumeric characters. It is *not* case sensitive. You need a User Name to log in to the software.
- * **Password** The User Password can be up to 25 alphanumeric characters. It is case sensitive. The User Password must be at least 8 characters long, include a capital and lower case letter as well as a special character or number. It is not visible

	after the initial entry for security purposes. If the user forgets his or her password, an Administrator can assign a new password.
Social Security Number	Enter the user's Social Security number. The Social Security number will flow to the Form W-2 for payroll purposes.
Goes By	The user's nickname or a name they prefer instead of their given name. For example, Richard may go by the name Rick.
Gender	Male or Female.
Date of Birth	User's birthday (mm/dd/yyyy) * A DOB entered here will activate the E-mail Template Birthday-employee email if that option has been set up in your Admin > E-mail Templates section of ATOM.
Marital Status	Indicates whether the user is single, married, divorced, or widowed.
Start Date	The user's first day of employment (mm/dd/yyyy).
* Site	This is the primary office site where the user will be working.
* Security Group	ATOM has Security levels preset in the software to limit access to certain functions.
SEE: Security group table below.	
* Experience	The level of employee experience using a star ranking system—one star being the least experienced and five star the most experienced. The experience ranking is very helpful when scheduling appointments in an attempt to match employee experience with tax return difficulty. This correlates to the Difficulty Rating that can assigned/customized in the Admin>Difficulty section of ATOM.
* Default Business Type	The user's primary Business Type. This Business Type will default in the Client's Account Information section when a new contact is added and on the Appointment Scheduler when a new contact is scheduled.
Address	User's street mailing address.
* Individual/Business	The user's primary Individual/Business contact. This Individual/Business contact will default in the Contact Information section when a new contact is added. For example, if your tax practice prepares predominately individual tax returns then the Individual/Business should be Individual.
City, State, Zip Code	User's mailing address.
* Default Account Type	The user's primary Account Type. This Account Type will default in the Client's Account Information section when a new contact is added.
Home Phone	Primary telephone number at user's home
Work Phone	If the user has other employment, enter that phone number here
Cell Phone	User's cell phone number
Office Phone	This is the phone number at the Site location where the user predominately works

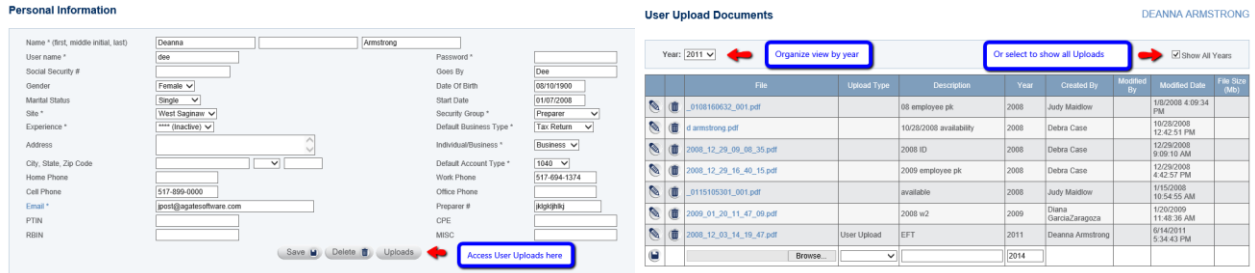
* Email	User's email address. Forgotten Password messages, Assigned Tasks, and System Messages will forward to this email address if requested.
Preparer #	Enter each user's tax user # assigned in the tax preparation software (Drake). For example, we assign a Drake user # for all our users just in case they may need to access Drake Software. This number must be a unique number for all employees within all of your offices for certain Discrepancy Reports to be accurate.
PTIN	Enter the Users Preparer's PTIN number for filing
CPE	Keep track of required CPE's by entering the accrued hours here
RBIN	Keep track of RBIN's, if needed for Bank Products, here
MISC	Record any other required identifier here if needed

Security Group Definitions

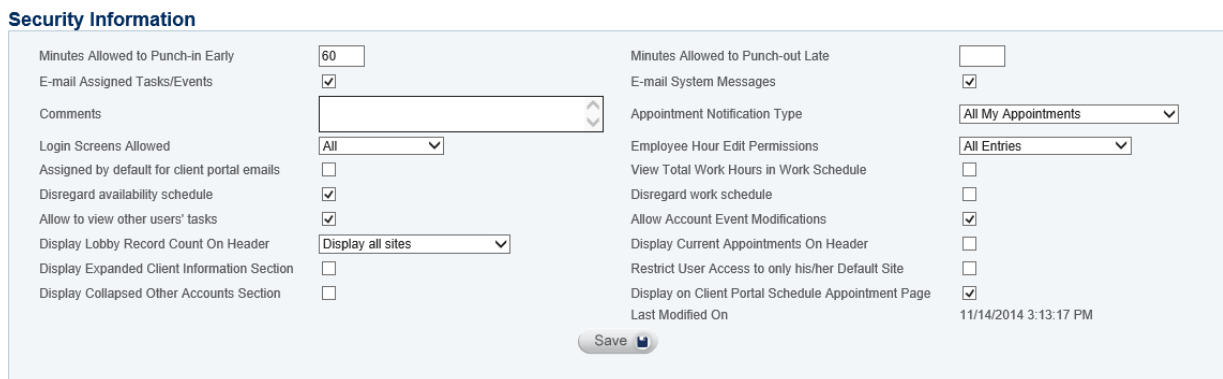
Inactive	User no longer has access to the software. The User's name will no longer appear in drop-down menus within the software other than reports. For security purposes, the user's Security Level should be changed to Inactive as soon as the user's employment ends or after tax season for employees who no longer need (or should) access to your ATOM account.
Receptionist, Preparer and Senior Preparer	Users all have equal access to the software with no special privileges other than they can delete a Task/Note, uploaded documents, and can delete an account year. They do not have Office Manager or Administrator privileges to access management tools.
Office Manager	User has the same privileges as the previous group, and can also: <ul style="list-style-type: none"> • Edit, copy, add, or delete information in the Availability and Work Schedules and Transaction Information • View and edit User's Personal and Family Information • Delete a Contact
Administrator	User has access to the entire software application and can: <ul style="list-style-type: none"> • Edit, copy, add, or delete any information in the Punch Clock or Administration pages, including user Tax Information. • View comments on the User's Personal Information screen. • Delete a contact.

User Uploads and Uploaded Document column descriptions

Documents and files can be added to your User pages to keep track of useful employee records. Files can be organized by year or they can be viewed all at once.



- File** Source file address of uploaded document
- Upload Type** Select the Upload Type as needed. Upload Types are assigned and customized in the Admin> Upload Type section of ATOM
- Description** Descriptions can be added by the user uploading the file as needed.
- Year** This field will self-populate with the current year but can be altered as needed. You should typically file the upload under the correct year of employment for each user.
- Created By** This field will automatically be attached to the user who uploads the document
- Modified By** This field will self-populate if a user modifies an upload with their name
- Modified Date** This field self-populates with the last modification date of an uploaded file.
- File Size (Mb)** ATOM will record the megabyte size of the file uploaded.



Security Information Field Description

Minutes Allowed to Punch-in Early

The number of minutes an employee is allowed to punch in before their scheduled work hours. For example, if 20 is entered in this field, and the employee is scheduled to work at 9:00 A.M. and they actually punch in at 8:30 A.M., then their official login time of record is 8:40 A.M. and not 8:30 A.M.

NOTE: *If the field is blank then there is no limit on when the employee can punch in. If there is a number entered in this field and the employee is not on the work schedule they will not be allowed to punch in. Also if there is a number in this field and they punch in twice for the day there may be an issue on the punch in times.*

Minutes Allowed to Punch-out Late

The number of minutes an employee is allowed to punch out after their scheduled work hours. For example, if a 10 is entered in this field, and the employee is scheduled to work until 5:00 P.M. and they actually punch out at 5:30 P.M., then their official log out time of record is 5:10 P.M. time and not 5:30 P.M.

NOTE: *If the field is blank then there is no limit on when the employee can punch out.*

E-mail Assigned Tasks Select this box if you would like your Assigned Tasks to be forwarded to your personal email address recorded on your User page in addition to your Assigned Tasks page. This is an open option for your users to choose if they wish to be notified.

NOTE: *Both the E-mail Assigned Tasks box and the E-mail System Messages box must be checked in addition to the email assigned tasks box.*

E-mail System Messages Check this box if you would like your System Messages to be forwarded to your personal email address recorded on your User page in addition to your Message Center. This is an open option for your users to choose if they wish to be notified.

Comments Comments or notes related to the user. The Administrator is the only one that can add and view comments. The users cannot see them.

Appointment Notification Type

The user will system message when an appointment is booked for them or the entire office depending on the level selected. This is an open option for your users to choose how they wish to be notified.

Login Screens Allowed This will limit the login capability for the user. For example: Normal login (full access to ATOM and client information) or User portal login (Just schedules and appointments with no client file access.)

Employee Hour Edit Permissions

Selections can be designated that allow the employee will be able to edit punch clock hours. Leaving this option unselected allows only the administrator to alter hours this employee's hours. For example: when an employee for gets to punch in they should contact their administrator to change the hours. Other choices can be selected per the level of access you would like this employee to have in regards to altering hours.

Assigned by default for client portal emails

If checked, the user will receive all office portal messages as a system message.

View Total Work Hours in Work Schedule

Selecting this option will allow the user to see a running tally of the hours scheduled for each employee on the work schedule. This option is especially useful for the scheduler if they are trying to schedule employees within a specific weekly limit (40 hours max.)

Disregard Availability Schedule

If selected, you will be able to create a work schedule for this user without having completed their Availability Schedule.

Disregard Work schedule

If selected, you can schedule appointments for this employee without having to create a Work Schedule.

Allow to view other user's tasks

Selecting this option will allow the User to see all the open/closed tasks for all employees on the My Assigned Task Page. This function is typically reserved for Administrators and Office Managers so they can keep track of all assigned tasks for their office in one place.

Allow Account Event Modification

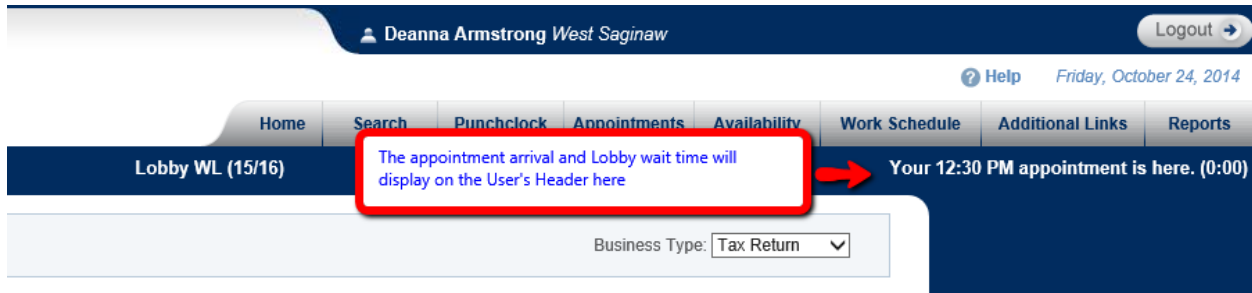
Selecting this option will allow the user to add, edit and delete Office Events.

Display Lobby Record Count on Header

Selecting this option will enable the Lobby count to appear in the blue header at the top of the page allowing you to track the lobby regardless of where you are working from in ATOM. You may choose to display the Lobby counts for all of your offices or just the office you are currently signed in with. This is an option your users can choose to select.

Display Current Appointments on Header

Selecting this option will enable the user to automatically be alerted when their appointment arrives. This is an open option your users can choose to select.



Display Expanded Client Information Section

Selecting this option will immediately display the full Client Information section of a Client’s file when opened; this option may be more useful for Reception. This is an open option for your users to choose how they wish to view the file.

Restrict User Access to only his/her Default Site

Users with multiple offices may wish to limit their employee’s access capabilities to the site (office) which they are assigned.

Display Collapsed Other Accounts Section

Selecting this option will collapse the Client’s Other Account section in the Client File. If selected the only years that will display is the last year of record and open account years for each Business Type Account. This is an open option for your users to choose how they wish to view the file.

Display on Client Portal Schedule Appointment Page

If selected, the User will display on the Client Portal’s appointment scheduler

Last Modified On

Atom will display the date and time the User page was last saved.

Task / Notes Information

User Tasks/Notes are typically reserved for employee records and Human Resource information administrator notes or Employee assignments.

Task / Notes Information

	Done	Task	Note	Creation Date	Due Date	Completed Date	Created By	Completed By	Modified By	Assigned To
	<input checked="" type="checkbox"/>	EIC Check List	01/02/2014 11:54:37 AM Diana Garcia-Zaragoza - Can you go in and to the EITC training on the IRS site. Go to Additional Links in ATOM and click on the EITC TRAINING link. Then click on The Due Dilligence Training Module and start the training. You will have to register for this, need to know your PTIN. Please type the user name and password you use for it in here. This will take about an hour so get it done ASAP to get over with. Thanks 01/07/2014 11:44:19 AM Diana Garcia-Zaragoza - Done, Dwan saved certificate and uploaded it to User file.	1/2/2014 12:08:56 PM	1/2/2014	1/7/2014 11:42:55 AM	Garcia-Zaragoza, Diana	Garcia-Zaragoza, Diana	Kemery, Dwan	Garcia-Zaragoza, Diana; Kemery, Dwan
	<input checked="" type="checkbox"/>	OJT Checklist	Gave it to Mark	1/2/2014 12:09:06 PM	1/2/2014	1/23/2014 10:45:44 AM	Garcia-Zaragoza, Diana	Kemery, Dwan	Kemery, Dwan	Garcia-Zaragoza, Diana; Kemery, Dwan
	<input checked="" type="checkbox"/>	PTIN Login	Login@gmail.com Password#1	1/2/2014 2:38:51 PM	1/2/2014	1/2/2014 2:38:49 PM	Garcia-Zaragoza, Diana	Garcia-Zaragoza, Diana	Kemery, Dwan	
	<input type="checkbox"/>	<input type="text"/>	<div style="border: 2px solid red; padding: 5px; display: inline-block;">User Tasks need to have been created in the Task Type section of your Administration options for use here.</div>		<input type="text"/>					Bergland, Jim Check In, Self Cleary, Andy Garcia-Zaragoza, Diana Kemery, Dwan Mogollon, Gonzalo Pricco, Colleen Pricco, Mark Schray, Mandie

View	Year	# of Tasks/Notes
	2014	3

Column Descriptions for Task/Notes Information

Done Selecting the “Done” option for a task will “Complete” the task. Users should only select this option if there is no need for the task to be assigned to another user for further work. An assigned task that has been completed should be marked as “Done” by the assigned employee to clear it from their Assigned Tasks and “Complete” the assignment.

Task User Task Types should be created in the Admin > Task Types section of ATOM so they appear in the User’s file.

Task Types

Business Type: All Business Types Show Inactive Records

	Task Type	Inactive	Event Status Link	Business Type	Confidential	User Task Type	Note Requested
	Confidential	<input checked="" type="checkbox"/>		All Business Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	CPE Class	<input checked="" type="checkbox"/>		All Business Types		<input checked="" type="checkbox"/>	
	OJT Checklist	<input checked="" type="checkbox"/>		All Business Types		<input checked="" type="checkbox"/>	
	PTIN Login	<input checked="" type="checkbox"/>		All Business Types		<input checked="" type="checkbox"/>	
	User Task	<input checked="" type="checkbox"/>		All Business Types		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="text"/>	<input type="checkbox"/>		All Business Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note Language pertaining to the assignment or note should be Time Stamped and added here.

Creation Date The date and time the task was created.

Due Date The date the task is due or assigned.

Note: In most instances you will keep the same timestamp as the creation date. If there is a future due date added here your assigned user will not see the assignment until the date the task is due in their Assigned Tasks unless they “View tasks” by a future date that includes the assignment due date.

- Completed Date** The date the task was completed. This is automatically time stamped when “Done” has been selected by the appropriate user.
- Created By** The user who created the task will be automatically added
- Completed By** This indicates the person that completed the task by selected “Done.”
- Modified By** This indicates the last person that modified the task in any way.
- Assigned To** Tasks can be assigned to one or multiple users by highlighting multiple names by using the control key.

Note: Yearly Task View - ATOM will default to the most current year’s User Task view but as you may have users with multiple years of employment ATOM will organize your user’s tasks by previous years which can still be viewed and edited.

View	Year	# of Tasks/Notes
	2014	1
	2011	1
	2010	1
		1

Select the "Eye" icon to view the year you wish to review

Tax/Reporting Information

Before a User’s name will appear in report drop-down menus, a Begin Date and End Date must be entered in the User’s Tax/Reporting Information and be kept current. From the User screen, go to the Tax/Reporting Information section.

Tax / Reporting Information

Show All

		Begin Date	End Date	Federal % Withhold	State	State % Withhold	City	City % Withhold	Rate Per Hour	Allow Overtime	Adjustment	401K % Ded	Note	Billing Rate	Commission %	Schedular's Commission %
		1/18/2009	7/5/2015	0	MI	0.04	LN	0.01	\$16.00	<input checked="" type="checkbox"/>	\$0.00	0	No Taxes taken out	\$0.00	0	0
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Field Descriptions for Tax Information

Begin Date The Begin Date **MUST ALWAYS** be the first day of the week—Sunday. Record the Begin Date as mm/dd/yyyy.

End Date The End Date **MUST ALWAYS** be a Sunday. Record the End Date as mm/dd/yyyy. For example, if Dora T. Explorer's first day of work was on January 2, 2007, which is a Tuesday, and her last day of work was on February 28, 2007, which is a Thursday, you would record her Begin and End Date as follows:

Begin Date: 12/31/2006 (Sunday at 12:01 A.M.) End Date: 03/04/2007 (Sunday at 12:01 A.M.)

NOTE: *Users will not be included in most reports after their recorded End Date.*

Federal % Withhold Percentage of federal tax the user would like withheld from their gross pay. Record percentage as decimals: For example, record 6% as .06.

State The state the user resides in.

State % Withhold Percentage of state tax the user would like withheld from their gross pay. Record percentage as decimals: For example, record 3% as .03.

City The City the user lives or works in if city taxes will apply. IF using a tax abbreviation it must be used for all employees subject to that city tax. For example: If employees live in Lansing, MI then all employees need the same city designation here. One should not have "Lansing" noted if the other employees use "LN" in the City Tax section.

City % Withhold Percentage of city tax the user would like withheld from their gross pay. Record percentage as decimals: For example, record 1% as .01.

Rate Per Hour This is the user's hourly rate of pay.

Allow Overtime If you do not want overtime to calculate you must uncheck the box. Otherwise, overtime is automatically calculated at time and a half for all hourly employees that exceed forty hours in a given workweek.

Adjustment This is an adjustment to the user's gross pay before taxes (FICA, Medicare, Federal, State, and City). To reduce gross pay enter as a negative amount (-100) and to increase gross pay enter as a positive amount (100). The Adjustment field can be used to pay employee bonuses or to pay salaried employees.

NOTE: ATOM calculates payroll weekly; therefore, if you want to give an employee a \$500 year-end bonus and you have a bi-weekly payroll, you should enter \$250 as an adjustment amount for that pay period.

401K % Ded Percentage of money the user would like withheld from their gross wages for retirement. Record percent as decimals: For example, record 6% as .06.

Note If needed, enter a note related to the particular pay period.

Billing Rate This is the user’s hourly billing rate. Enter a dollar amount here if you want to bill your contacts by the hour instead of by the tax form. By entering a dollar amount, the User will be able to log billable through the Punch Clock.

SEE: Logging Billable and Non-Billable Hours in the Punch Clock chapter for more information.






Commission % This is the User’s commission rate for preparing tax returns. See Management – Commission Report.

Scheduler’s Commission %
This is the User’s commission rate for scheduling appointments. See Management – Scheduler’s Commission Report.

Family

Add Family or friend information here for emergency contacts for your employees.

Family

		Name	Relationship	Phone
		janice case	mother	517-881-6666
		miranda case	daughter	517-980-1122
		<input type="text"/>	<input type="text"/>	<input type="text"/>

Field Descriptions for Family Information

Name Name that you would like contacte ing the case of an emergency.

Relationship The relation to the employee.

Phone Contact phone number.

Additional Links

Use the Additional Links screen to add a New Internet or Company Link, or to delete/edit an existing Internet or Company Link. Common Internet Links may be the IRS website, state websites, and city websites, etc. Common Company Links may be company letterhead, company policy, and company procedures, etc. Links that are frequently used can also be added as a “Favorite Link” for quick access inside the Client’s File.

Note: *Additional Link Types are added in the ATOM > Admin > Additional Link Types section*

To access the Additional Links Screen: Go to Admin > Additional Links.

Additional Links

The screenshot shows the 'Additional Links' interface. At the top, there is a 'Business Type' dropdown menu set to 'Tax Return'. To its right are two buttons: 'Organize your view by Business Type' (highlighted with a blue box and arrow) and 'Organize and Collapse view by Link Type' (highlighted with a red box and arrow). Further right is an unchecked checkbox labeled 'Organize By Type'. Below these controls is a table with the following columns: Description, Link, Link Type, Display In Favorite Links, and Ordinal in Favorite Links. The table contains seven rows of links related to due diligence forms and tax instructions.

	Description	Link	Link Type	Display In Favorite Links	Ordinal in Favorite Links
	DUE DILIGENCE FORM - CLIENT INFO (YELLOW)	https://login.atomanager.com/ATOM_XTAX_Uploads/Company-1/client_information.doc		✓	4
	DUE DILIGENCE FORM - RENT CREDIT (GREEN)	https://login.atomanager.com/ATOM_XTAX_Uploads/Company-1/rent%20credit%20form.doc		✓	5
	DUE DILIGENCE FORM - SELF EMPLOYMENT (PINK)	https://login.atomanager.com/ATOM_XTAX_Uploads/Company-1/self%20employment%20income.doc		✓	6
	FORMS AND INSTRUCTIONS - IRS	http://www.irs.gov/app/picklist/list/formsinstructions.html		✓	7
	FORMS AND INSTRUCTIONS - LANSING	http://www.cityoflansingmi.com/finance/incometax/tax_forms.jsp			
	FORMS AND INSTRUCTIONS - MICHIGAN	http://www.michigan.gov/taxes/0,1607,7-238-44143-181730--,00.html			
	IRS Efile Cycle Chart	http://www.irs.gov/pub/irs-pdf/p2043.pdf			
	PRACTITIONER HOTLINE - MICHIGAN (ID-123451040; Password: practitioner)	https://treas-secure.treas.state.mi.us/eservice_enu/start.swe?SWECmd=Login&SWECDM=S&SWEHO=treas-secure.treas.state.mi.us			

Column Descriptions for Additional Links

- Description** Identifying link information which will also be the “link name” should you choose to designate this as a Favorite Link.
- Link** URL of the direct Internet Link or the source Company Link for forms and documents.
- Link Type** Additional Link Type for the document or link address. The Link Type will help you organize your Additional Links.
- Display in Favorite Links**

Selecting this option will allow this link to be shown on the Client Information Page in the Favorite Links section and is useful for frequently used documents and links such as Company Letterhead, IRS or State websites, etc.

Ordinal in Favorite Links

If the Display in Favorite Links is selected you should choose in which order a particular Link will be displayed. As with all ordinals we suggest using increments of 5 so future Links can easily be arranged without having to reorder the current list.



Adding New Additional Links

Adding a New Internet Link

To add a link for an internet site you must enter the complete URL Address. For example you may wish to link directly to the IRS website. You would enter a proper description, add the direct link <http://irs.gov>, designate a Link Type if applicable, decide if you wish to use it as a Favorite Link and in which order you wish the Favorite Link to appear. To access the link you will simply click on the link from the Additional Link page or from the Favorite Link section of your Client Page if applicable.

Adding Company Link

To add a Company Link such as your Fax Coversheet or your Company Letterhead to the Additional Links screen, you must first upload the document you would like linked to a User's Upload screen or to the Company Upload screen. Once the document is uploaded, you then link it from the Upload screen to the Additional Links screen.

Save a Document to the Company Upload Screen

- From the Company screen:
- Click the Upload button
- Click the Browse Button
- Locate and double-click the document you would like linked

- Enter a Description for the document
- Click the Save icon

NOTE: You cannot link a file folder—it must be a document (MS Word, Excel, etc.)

Upload Company Documents

							<input type="checkbox"/> Show All Years
		File	Upload Type	Year	Description	Modified By	Modified Date
		client_information.doc			Client Information (Yellow)	Mark Pricco	1/13/2009 5:13:46 PM
		consent to use form.doc			Consent to Use Form	Diana GarciaZaragoza	1/8/2009 12:28:05 PM
		id requirements for check cashing 2009.blb.doc			ID REQUIREMENTS FOR CHECK CASHING	Mark Pricco	1/21/2009 3:28:57 PM
		2009_01_18_17_40_38.pdf			RAL Decline Codes	Mark Pricco	1/18/2009 5:41:52 PM
		rent credit form.doc			Rent Credit form	Mark Pricco	1/13/2009 5:42:48 PM
		self employment income.doc			Self Employment Income (Pink)	Mark Pricco	1/13/2009 5:14:22 PM
		hctxh1-dr-2009-00052_11041.pdf	Company Upload			Mark Pricco	6/9/2011 1:52:02 PM
		republic ral review form.pdf	Company Upload		RAL Review Form	Mark Pricco	2/12/2010 11:51:26 AM
		<input type="text"/> <input type="button" value="Browse..."/>		2012	<input type="text"/>		
View		Year		Documents			
		0		8			

Link the saved uploaded file to the Additional Links screen

- From the Company Upload screen:
- Right-click on the saved uploaded file
- Select “Copy Shortcut” from the drop-down menu when hovering over the file name

		File	Description	Modified By	Modified Date
		<u>_0624153443_001</u>	Fax Coversheet	Mark Pricco	6/25/2008 9:55:49 AM
		<input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/>		

- Open the Additional Links screen
- Right-click in an empty Link field
- Select Paste from the drop-down menu
- Enter a Description for the Link

- Click the Save icon

Additional Links

Business Type: Tax Preparation				Organize By Type	
	Description	Link	Link Type	Display in Favorite Links	Ordinal in Favorite Links
		s	BLANK	<input checked="" type="checkbox"/>	160
		ss	BLANK	<input checked="" type="checkbox"/>	89
	CITY TAX PY WORKSHEET	https://login.atomanager.com/ATOM_XTAX/DisplayUpload.aspx?file=Tx6808SA0R/0511Plan6WwufJ3M1bUDZb@hUIURD1W5n1TP6IGxX3HduTWx4	CITY	<input checked="" type="checkbox"/>	95
	FORMS / INSTRUCTIONS - JC	http://www.cityofjackson.org/DocumentCenter/Home/View/267	CITY	<input checked="" type="checkbox"/>	93
	FORMS / INSTRUCTIONS - LN	http://www.lansingmi.gov/individual_form	CITY	<input checked="" type="checkbox"/>	92
	LANSING PAYMENT VOUCHER	http://www.lansingmi.gov/media/View/2014_L1040_Pymt_Voucher/7664	CITY	<input checked="" type="checkbox"/>	94
	1st Money Center Training Instructions	https://login.atomanager.com/ATOM_XTAX/DisplayUpload.aspx?file=8u0Uw5ktfppd1EnQgm6UzyZQrpgC5IwwYuhM8Nq52X9YyW0xe2nxLILY9ku0S65Zeo06E%3d	COMPLIANCE TESTING AND PTIN REGISTRATION		
	EITC TRAINING	http://www.etc.irs.gov/Tax-Preparer-Tools/tdmodule	COMPLIANCE TESTING AND PTIN REGISTRATION		
	PTIN REGISTRATION/RENEWALS	https://tpr.irs.gov/datamar/mainMenuUSIRS.do	COMPLIANCE TESTING AND PTIN REGISTRATION		

To edit or delete a Company Link, select the Edit or Delete Icons. To view a Company Link simply click on the link