ATOM Software Video Library

Getting Started

If you're new to ATOM Software, these videos provide details on how to upload your client files, and give you the basics to help get you started using ATOM Software.

1. **Explanation of URL Links**
   - ATOM, Check-In, Client Portal, Prospect Portal, Appointments — Video
   - Lobby Tracker Page *(Inside your office)* — Video
   - Lobby Tracker Page *(Outside Your Office)* — Video

2. **Upload your Client Files and your Company Logo** — Video

3. **Login to your ATOM Software**
   - With No Restrictions
     - Normal Login — Video
   - With Restrictions
     - User Login — Video
     - Login based on Work Schedule — Video
   - Login Reports — Video

4. **Update your Company and Office(s) profile** — Video

5. **Add a User *(Employee)***
   - User's Personal Information — Video
   - User's Tax/Reporting Information — Video

6. **Search for a Client** — Video

7. **View a Client File** — Video

8. **Add a Client** — Video

9. **Add an Account Year**
   - With a Single Business Type *(Tax Preparation)* — Video
   - With Multiple Business Types — Video

Admin Setup

These videos walk you through the set-up process for all 34 ADMIN pages. Many ADMIN pages have already been preset and there is nothing more needed unless you need to customize to meet your office needs. For your convenience, we placed each video on its appropriate ADMIN page inside the software.

Account Types	Video
Additional Link Types	Video
Adjustment Types	Video
Batch Messages	Video
Billable Task Types	Video
Business Types	Video
Cell Phone Providers	Video
Check In Message	Video
Clean Uploaded Documents	Video
Client Email Txt Log	Video
Client Portal Links	Video
- Schedule My Appointments	Video
Company	
- Company Information	Video
- Security Information	Video
- FICA Tax & Federal Unemployment Information	Video
Difficulty	Video
Email / TXT Templates	Video
- Invoice Template	Video
Employee Positions	Video
Event Message Types	Video
Event Status	Video
- 1st Group of Column Headings	Video
- 2nd Group of Column Headings	Video
- Check List	Video
- Pre-defined Notes	Video
- Client Notifications	
o Event Creation Notifications	Video
o Event Notification on Start Date	Video
o Event Notification XX Days From Start Date	Video
o Event Notification on End Date	Video
o Predefined Client Notifications	Video
Payment Methods	Video
Predefined Client Portal Messages	Video
Predefined Prospect Messages	Video
Prospect Message Subject	Video
Referral Types	Video
Rejection Codes	Video
Report Permissions	Video
- Customized Text	Video
Rollover Accounts	Video
Scheduler Properties	Video

Admin Setup (Continued)

Scheduling Types	Video
Security Group Permissions	Video
Sites	Video
Stations	Video
Task Types	Video
- Pre-defined Notes	Video
- Client Notifications	Video
Transaction Types	Video
- Transaction Types #1 *(1st group of column headings)*	Video
- Transaction Types #2 *(2nd group of column headings)*	Video
- Pre-defined Notes	Video
Upload Types	Video
Users	
- Personal Information	Video
- Security Information	Video
- Task/Notes Information	Video
- Tax/Reporting Information	Video

ATOM Workflow

These videos provide a general overview of how ATOM Software can work in your tax and/or bookkeeping office.

Workflow for a Tax Preparation Office	Video
- Process On-line payments in-house	Video
Workflow for a Bookkeeping Office	Video

How to Create a Workflow

ATOM comes with several workflows already preset in the software (i.e. Tax Preparation, Bookkeeping, etc.). However, it you'd like to customized these existing workflows, or create NEW workflows, watch the following eight videos.

Step 1. Create Business Types	Video
Step 2. Create Office Events	Video
Step 3. Create Office Event Pre-defined Notes	Video
Step 4. Create Office Event Check Lists	Video
Step 5. Create Transaction Types	Video
Step 6. Create Task Types	Video
Step 7. Create Task Type Pre-defined Notes	Video
Step 8. Create/Edit Upload Types	Video

How to Create Workflow (Bookkeeping)

These videos demonstrate how to set-up and use ATOM's Office Events to track and organize your Bookkeeping tasks.

ADMIN Set-up (Bookkeeping)	Video
Setting up an Existing Client for Bookkeeping	Video
Setting up a NEW Client for Bookkeeping	Video

Billing Your Clients

There are four different reports you can use for billing purposes depending on your needs.

1. Returns with Balance Due – *list your client's outstanding balance*	Video
2. Print Transaction History – *print an individual Client Invoice or Statement*	Video
3. Balance Due Invoicing – *print Batch Invoices for all Clients*	Video
4. Balance Due Statement – *print Batch Statements for all Clients*	Video

Client Portal

These videos explain how your clients can use the Client Portal *(Client View)* and how your employees can manage the Client Portal *(User View)* from within ATOM Software.

Client View	Video
- Login Instructions	Video
- Portal Main Menu	Video
- Check the Status of My Tax Return	Video
- Get a Copy of My Tax Return and Documents	Video
- Upload Documents	Video
- Electronic Signatures	Video
- Add Questions/Notes/ to My File	Video
- Schedule My Appointment	Video
- Request My Appointment	Video
- Get a Copy of My Invoice and Receipt	Video
- Make on-line Payments	Video
- Update Contact Information	Video
- Client Referrals	Video
- Office Events Tracking	Video

User View *(Employee View)*	
- Assign Client Portal Passwords	Video
- Manage Incoming Messages	Video
- Manage Incoming Documents	Video
- Manage Incoming E-Signature Documents	Video
- Manage Appointment Requests	Video
- Sending Messages and Documents to the Client	Video

Reports *(2 Reports)*	Video
- Login Log *(Identify which clients are using your portal)*	
- Client Count *(how many clients are using your portal)*	

Document Management

Get organized by storing all your paper files in ATOM. Whether it is client records, employee records, or company records, ATOM has a place so you'll never spend more than 15 seconds finding them again.

Permanent Documents

Documents that **ARE NOT** year specific; such as driver's license or social security cards Video

Account Documents

Documents that **ARE** year specific; such as Tax Returns, W-2s, 1099s, etc.

- Accessing the Account Documents page Video
- Uploading Account Documents Video
- Moving Account Documents Video
- Giving Client's Access to Account Docs (Tax Returns, etc.) Video
- Sending Client Notifications (Emails/Text) with Client Access Video
- Disable Client Notifications (Emails/Text) with Client Access Video
- Set-up and Manage E-Signature Documents Video
- How to PDF a Tax Return & Upload into ATOM Video

Company Uploads Video

User Uploads Video

Home Page Overview

The Home Page provides a quick snapshot of your office as a whole using the Office Events, User Overview and Office Overview.

Home Page Overview Video

Office Events Overview Video

Lobby Management

If you have a busy Lobby than ATOM's Lobby Management features are the answer. From Self Check-In to tracking Lobby wait time outside the office, ATOM will make your client's Lobby experience painless and streamlined.

Check-In Process

- Check-In URL Link Video
- How to Set-up and Use the Check-In Screen Video

Lobby Tracker *(inside your office for Clients)*

- Lobby Tracker URL Link Video
- How to Set-up and Use the Lobby Tracker Video

Lobby Tracker *(outside your office for Clients)*

- Lobby Average Times URL Link Video
- How to Set-up and Use the Lobby Average Times page Video

Lobby Screen *(inside your office for employees)* Video

Office Overview

The Office Overview is where Portal Messages and Prospect Messages are managed. Please refer to the Office Portal and Prospect Portal sections below for video training. Watch the video on Web Service Data Import to understand how to import your EF Data from Drake and Crosslink.

Office Portal Messages	See Client Portal Videos
Office Prospect Messages	See Prosp Portal Videos
Drake / Crosslink Web Service Electronic Filing Data Import	Video

Prospect Portal

Managing prospect leads has always been a problem so we developed the Prospect Portal to streamline the process. Now all prospect leads will be funneled straight into ATOM so tracking and managing these leads will be quick and easy. These videos explain how your potential clients (prospects) will use ATOM's "Landing Page" to ask questions, request appointments, and schedule appointments. The videos also demonstrate how your employees can manage the Prospect Portal from within ATOM Software.

Prospect View

- Landing Page — Video
- New Clients Requesting Appointments — Video
- New Clients Scheduling Appointments — Video

User View *(Employee View)*

- Manage Incoming Messages — Video
- Manage Appointment Requests *(New Clients)* — Video

Punch Clock

ATOM's Punch Clock will help you better track your employee hours and Client billable hours.

Punch-In / Punch-Out	Video
Edit Employee Hours	Video
In/Out Board	Video
Log Billable Hours	Video

Reports *(3 Reports)*

- Employee Hours by Date Range — Video
- Billable Hours by Client — Video
- Billable Hours by User (Employee) — Video

Recording Billable Hours (3 Different Ways)

You can record Billable Hours three different ways depending on your needs. You can use the Punch Clock (as we demonstrated above), Office Events, and Transaction Types. Pick the method that is right for you.

Punch Clock – *Refer to the Billable Hour videos in the Punch Clock section above*

Office Events

- Recording Billable Hours — Video
- Reports – Client Hourly billing / Events — Video

Transaction Types

- Recording Billable Hours — Video
- Reports – Management Employee Time Card (Transactions) — Video

Refer-A-Friend Processing *(4 Steps)*

Tracking and mailing referral payments is a four step process. Be sure to complete the steps in order otherwise you will find yourself doing more work than is needed.

Step 1. Run the Refer-A-Friend Report to see who needs to be paid — Video
Step 2. Print Mailing Labels *(you can skip this step if using # 9 window envelopes)* — Video's (2 - 4)
Step 3. Print RAF Letter
  a. Customize RAF Letter (English and Spanish) — Video
Step 4. Record Date Paid in the RAF Pop-up Box

Scheduling *(3 Steps)*

Scheduling client appointments is a 3 Step process if you need to track employee availability and employee work schedules. If tracking these schedules is not critical to your office you can skip steps 1 and 2; however, you need to watch video 1 to see how to disable these schedules.

Step 1. Add/Edit/Copy Employee Availability Schedules — Video
Step 2. Add/Edit/Copy Employee Work Schedules — Video
Step 3. Add/Edit/Copy Client Appointments

- Schedule Existing Clients — Video
- Schedule New Clients — Video
- Schedule Appointments w/Multiple Business Types — Video
- Edit and Copy Appointments — Video

Reports *(3 Reports)* — Video

- Pre-Scheduled Appointments
- Client Appointments – Post Cards Mailings
- Clients Visiting your office by the Hour

Twilio Set-up

Send SMS Text messaging alerts to your clients automatically. ATOM has integrated with Twilio to offer text messaging through ATOM. If you are interested you will need to set up an account with Twilio. The following videos will walk you through the set-up process.

Step 1: Set-up your Twilio Account	Video
Step 2: Shutoff Reply Text Messaging	Video
Step 3: Select SMS Provider Options	Video

User Overview

The User Overview is where the User (employee) manages their assigned tasks, internal messages, client appointments, and work schedules.

My Assigned Tasks

- Overview	Video
- Report – Employee Assigned Tasks	Video

My Message Center

- Managing My Messages	Video
- How to Compose a System Message	Video

My Appointments

- Overview	Video

My Work Schedule

- Overview	Video

How to Use ATOM for Bookkeeping for YOUR Office*

You can use ATOM to track all your income and expenses similar to QuickBooks. And you can use ATOM to organize and store all your receipts. It doesn't contain all the "bells and whistles" of QuickBooks but it is a basic journal entry system that can be used for your office.

Activate the "Bookkeeping My Office" Business Type	Video
Setup Vendors or Account Types	Video
Setup Opening Account Balances	Video
Record Journal Entries & Upload Receipts	Video
Record Year End Closing Journal Entries	Video

Reports (7)	Video

- Balance Sheet
- Balance Sheet Monthly
- Client Balance
- Profit and Loss Statement
- Transaction Entries
- Transaction Types
- Transaction Types Summary

***Not applicable to most ATOM Users. Contact ATOM Support before attempting**