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 *(Self-Check-in, Client Portal, etc.)* 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. Add a Client Video
7. Add an Account Year
   - With a Single Business Type *(Tax Preparation)* Video
   - With Multiple Business Types Video

ATOM Workflow Demonstrations

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

Tax Preparation Office Video
- Process On-line payments in-house Video

Bookkeeping Office Video

How to Create a Workflow *(8 Steps)*

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

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. *2.* Print Transaction History – *print an individual Client Invoice or Statement* Video
3. *3.* Balance Due Invoicing – *print Batch Invoices for all Clients* Video
4. Balance Due Statement – *print Batch Statements for all Clients* Video

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 Video
Account Documents
- Upload Documents Video
- Moving Documents Video
- E-Signature Documents Video

Company Uploads Video
User Uploads Video
How to PDF a Tax Return & Upload into ATOM Video

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

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

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

User Overview

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

My Assigned Tasks	Video
- Report – Employee Assigned Tasks	Video
My Message Center	
- Managing My Messages	Video
- How to Compose a System Message	Video
My Appointments	Video
My Work Schedule	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

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)*	

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

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	
Step 4. Record Date Paid in the RAF Pop-up Box	

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

Admin Setup

These videos walk you through the set-up process for all 29 ADMIN pages. Most ADMIN pages have already been preset and there is nothing more needed unless you'd like to make customization changes to the software. We recommend you first watch the videos above, and then based on your needs, watch the applicable ADMIN videos to help customize your 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 Portal Links	Video
- Schedule My Appointments	Video
Company	Video
Difficulty	Video
Email / TXT Templates	Video

Employee Positions	Video
Event Message Types	Video
Event Status	Video
- Check List	Video
- Pre-defined Notes	Video
- Client Notifications	
○ Event Creation Notifications	Video
○ Event Notification on Start Date	Video
○ Event Notification X Days From Start Date and Instant Notification	Video
Payment Methods	Video
Prospect Message Subject	Video
Referral Types	Video
Rejection Codes	Video
Report Permissions	Video
- Customized Text	Video
Rollover Accounts	Video
Scheduler Properties	Video
Scheduling Types	Video
Security Group Permissions	Video
Sites	Video
Stations	Video
Task Types	Video
- Pre-defined Notes	Video
Transaction Types	Video
- Pre-defined Notes	Video
Upload Types	Video
Users	
- Personal Information	Video
- Security Information	Video
- Task/Notes Information	Video
- Tax/Reporting Information	Video