

Getting Started

ATOM SOFTWARE

GETTING STARTED

Basic Training

- **01. ATOM Link** (*ATOM Login*)

https://login.atomanager.com/ATOM_XXX/login.aspx
https://login2.atomanager.com/ATOM_XXX/login.aspx
- **02. Add the ATOM Link to your Desktop and Phone**
- **03. Login / Logout** **VIDEO** (1:20)
- **04. View a User File** (*click on name*)
- **05. Add a User** (*Employee*)
 - Personal Information **VIDEO** (10:21)
 - Tax / Reporting Information **VIDEO** (5:41)
- **06. Update your Company Profile** **VIDEO** (1:37)
- **07. Search for a Client** **VIDEO** (3:05)
- **08. View a Client File** **VIDEO** (2:42)
- **09. ? Help Menu**
- **10. Help with Client List and Logos** **VIDEO** (4:32)
- **11. Additional ATOM Software Training Request**

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Additional ATOM Software Training Request

Check the box(es) for those ATOM features you would like to learn how to use in your office.

Please have a date and time in mind for your next training session which may include all or some of the features selected below.

- 01. Bank Product Processing (*Drake / Crosslink / TaxWise Users*)
- 02. Batch Messages (*Emails/Text/Portal Messages*)
- 03. Billable Time
- 04. Checklists
- 05. Client Portal
- 06. Contact Management
- 07. Drake / Crosslink / TaxWise Users (*EF Data Import*)
- 08. Document Management
- 09. Email / Text Templates (*Happy Birthday, Appointment Reminders, etc.*)
- 10. Fees / Payments / Invoicing
- 11. Lobby Management (*Check-In Screen. Lobby Tracker, etc.*)
- 12. Online Reviews
- 13. Punch Clock
- 14. Refer a Friend
- 15. Referral Tracking
- 16. Scheduling (*Appointments*)
- 17. Scheduling (*Employee Availability*)
- 18. Scheduling (*Employee Work Schedule*)
- 19. Task Assignments
- 20. Texting (2-way)
- 21. Workflow (*Bookkeeping, Financial Planning, IRS Resolution, etc.*)
- 22. Workflow (*Prospects*)
- 23. Workflow (*Tax Preparation*)
- 24. Other _____