Getting Started

ATOM SOFTWARE

GETTING STARTED

Basic Training

- ☐ **01. ATOM Link** (*ATOM Login*)
- ☐ **02. Add the ATOM Link to your Desktop and Phone**
- ☐ **03. Login / Logout** VIDEO (1:20)
- ☐ **04. View 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)

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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
- ◻ 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 ____