Getting Started Guide

Welcome to ATOM Software! ATOM has numerous features and moving parts. Therefore, this guide will aim to get you familiar with how to upload your client list and give you the basics to help get you started in using ATOM Software. Understanding the basics is a crucial first step to being able to understand the rest of the software. On top of literature, we also offer one-on-one training sessions. Reach out to ATOM Support if you'd like to set up a training session on this topic.

1 Helpful Tips – Before you Begin to Use ATOM

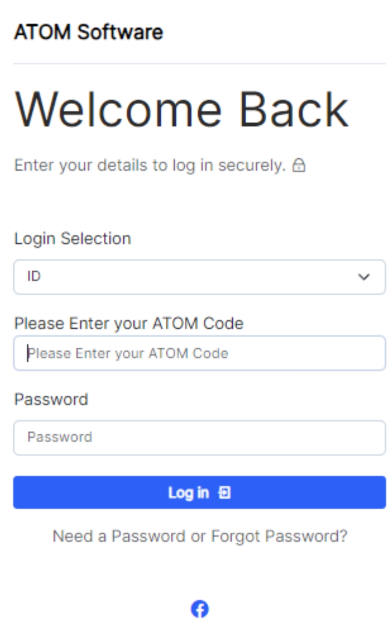
Once your software URL is created, we typically send out 3 emails. One email includes your unique ATOM URL link. We will also include your login information with your temporary password that you will use to log into your site. Another email includes login information on how to contact ATOM Support by using our client portal. The third email has instructions on how to send us your client list so that our programmer can upload your clients into your ATOM database.

We'll start with talking about our client portal communication, how and where to upload your client list, and then how to get started with your software.

1.1 ATOM Client Portal

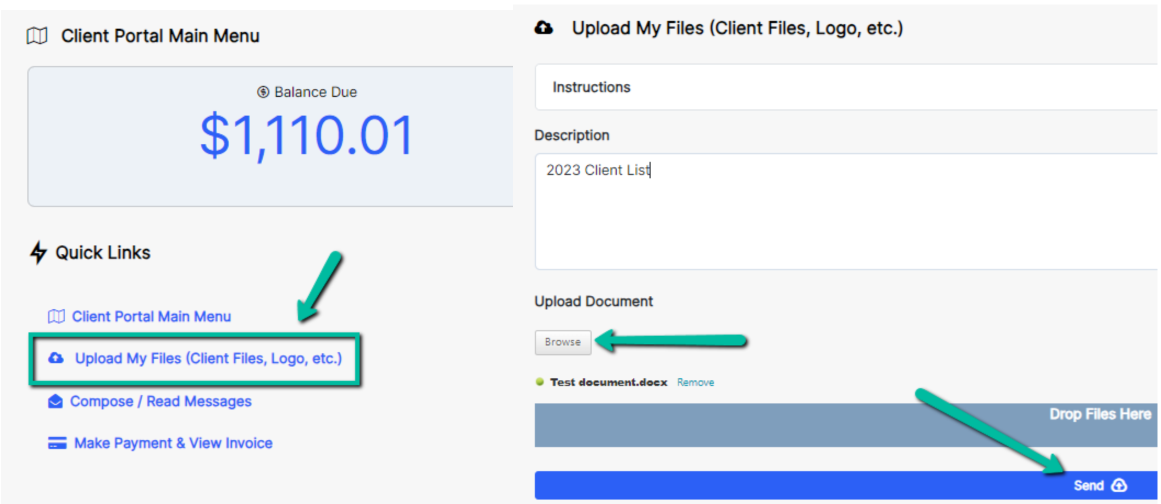
Video: Getting Started - How to Log into our Secure Client Portal

Now that you've joined ATOM, you can use our client portal to communicate with ATOM Support. Our client portal URL is **https://login.atomanager.com/ATOM_CLIENTS/webinfodefault.aspx**. One of the emails that we send will include your login credentials, like what your ATOM Code is and your temporary password. But feel free to contact ATOM Support and we can help you get logged in. This secure portal allows you to communicate with ATOM support staff regarding any questions that you may have, send us confidential information like client lists, pay your account, read announcements, or to simply request a training session. This is a faster and more accurate way to communicate with the ATOM Support Team.



1.2 Uploading your Client List

When your ATOM Site is ready, we will also send an email that contains instructions on how to upload your most current client list into ATOM. We have custom instructions for Drake, Crosslink, and Taxwise users that will help you with how to upload your clients into your ATOM site. For all other Tax Softwares, we will provide you with our templates that are used to help you upload your individual and business clients into your ATOM site. You can also download our customized template(s) from our website. Go to www.atomanager.com > scroll down to the bottom of the page > Click on Document Downloads > click on Download to use our template. You will have to export your client information from your tax software into these templates. Keep in mind that if you do not use one of the column headings in the template, please leave it alone and do NOT delete it. Once you have your client list ready, log into our Client Portal > click on Upload My Files > Browse or Drag/Drop your client list into this section > type a brief Description to what you are sending > click Upload. This is a secure way in which you can send us your client list(s). Please do NOT email your information to us.



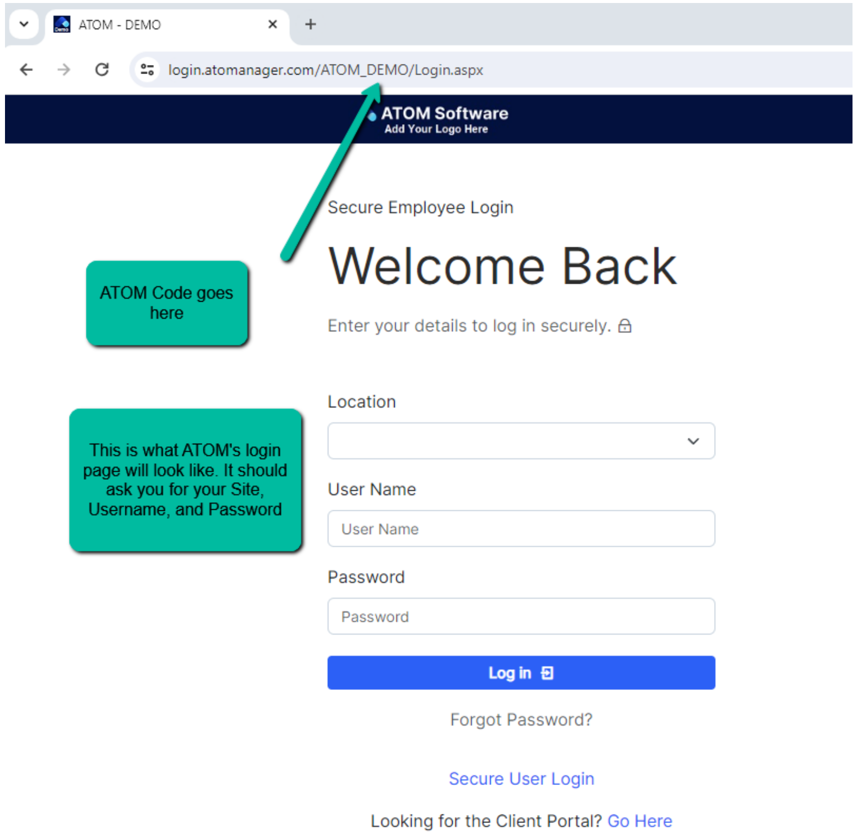
2 Welcome to Your Software

Video: Getting Started - How to Log into your ATOM Software

To access your ATOM Software, you will need to open a web browser and enter your ATOM URL. Your ATOM URL will be **https://login.atomanager.com/ATOM_XXX**. The "**XXX**" is a unique code that we give to each ATOM client. You will hear us call this "your ATOM Code". We mention this code in the startup emails that we send out. You can always contact us to ask for your ATOM code.

Once you enter your URL into the web browser, you will notice the Login page. **We HIGHLY recommend that you create a bookmark or a shortcut to the desktop for it.** This will make it much easier to access your ATOM Software every day.

You will be required to select a site on the login page. You will then need to enter your Username and Password. The startup email that contains your URL will also have your Username and Temporary Password. Once you log in for the first time, ATOM will require you to update your password. Again, feel free to contact us if you need assistance and we can help get you logged in.



3 Reading ATOM's Home Page

When you first log into your software, you will be taken to the Home page. The Home page is a snapshot of the office as a whole and a summary of what is going on for yourself as a User. We will do a quick overview of this page before we cover other important Getting Started topics.

3.1 Office Events

On the far left of your Home page will be a section called Office Events. The Office Events is going to be your office workflow or any steps that you think are important to track for your client files. You will see a list of some preloaded Office Events for your Tax Preparation Business Type. These can be viewed/used as an example of what a workflow can look like. These Events will help keep track of where your client files are at in the process. Don't worry if these Events do not match your office workflow; we can help you customize them in a personal training session.

3.2 Overview

In the center, you'll find the Overview section. This is where you can see things like Assigned Tasks, ATOM Messages (messages from other staff member sent to you), Appointments (what clients are scheduled to see you), and Work Schedule (show your hours that you will be working), which are specific to you as a User. All of these tie into other features of ATOM which you will learn about as you continue with the software.

3.3 Office Communications

On the right of the Home page, you will find the Office Communications section. These are messages to the office from your clients. All ATOM users will see the Office Portal and Prospect messages.

If you decide to sign up for Twilio (texting through ATOM) and/or SendGrid (Email integration), you will have additional links that will lead to those incoming messages. Same is true if you sign up for our VoIP and Fax services.

3.4 Top of the Page

The top of Home page will contain settings that alter the date shown, the site (if you have multiple ATOM sites), and various Data Management functions like User productivity viewing and Assigned Tasks Aging. If you use Drake or Crosslink, you will also see a link that is used for your EF Data Import. We will cover EF Data Importing in a future training session.

You will want to familiarize yourself with the Home page to help you distinguish from Office Status/Messages vs. your own tasks/messages/calendar.

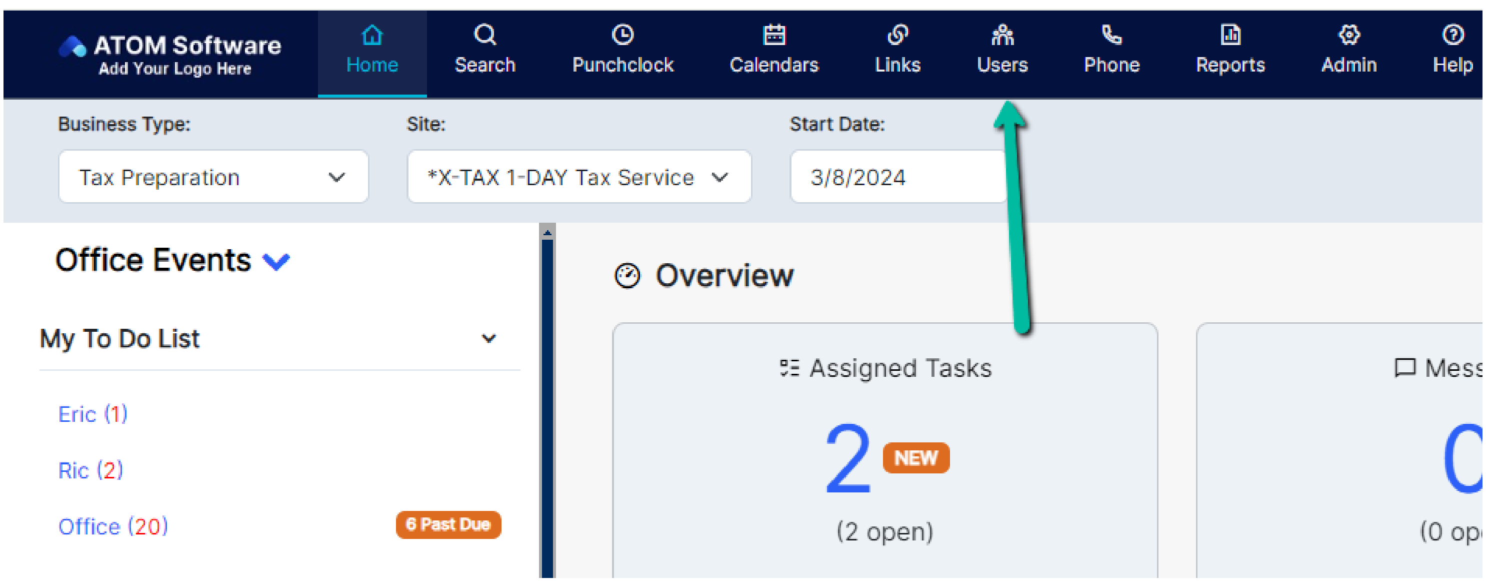
4 Users in ATOM

When your ATOM site is created, we create a User file for the Primary Contact on the ATOM contract. ATOM can have an unlimited number of Users. Every person who will be using your software will need to have their own User file. This helps with tracking notes, tasks, who's working on what files, etc.

Video: How to Add a New User to ATOM – Personal Information

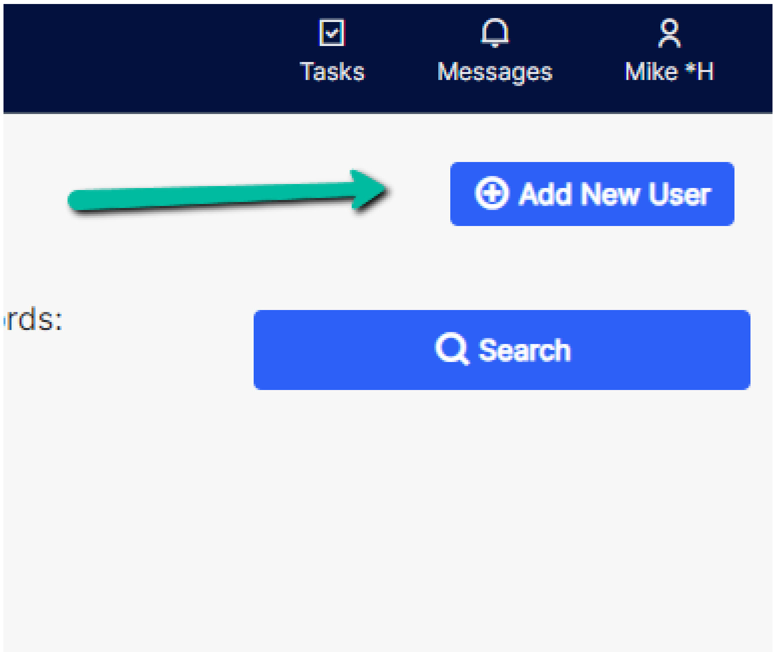
4.1 Adding Users

Click on the Users tab located towards the top middle of your screen. After you click on Users tab, you will see a list of your Active Users.



On this page, you can click on the User's name to view their User file.

If you want to add a new User, click on the "Add New User" button which is located at the top-right of the Users page. This will open a blank User file.

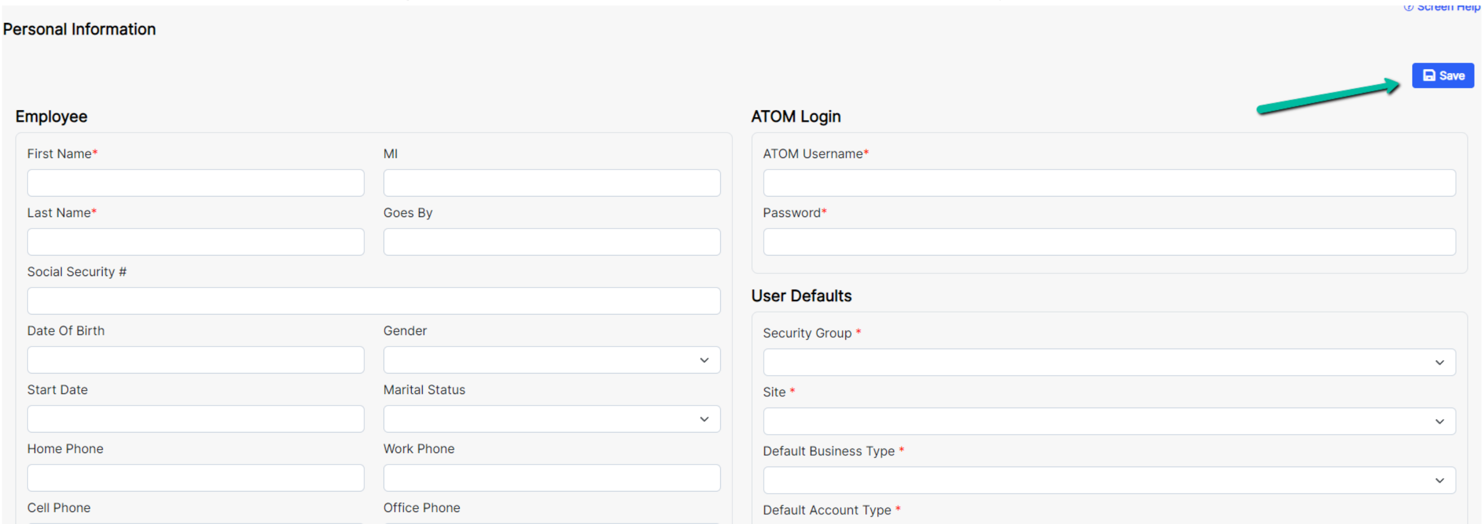


In order to save new user information in ATOM, you will need to have data entered in every field that has an asterisk:

- **Name**: Employee's first and last name.
- **Email**: Recommend using the employee's personal email. This will be the email that the software will use to send automatic messages and for the Forgot Password link.
- **User name**: This is used to log into the software.
- **Password**: This is used to log into the software. *Password must be at least 8 characters, a mix of upper and lower case letters, and at least one number or special character. Note: When logging in for the first time, ATOM will prompt the user to reset the password.
- **Security Group**: This is the security level that the User will have to determine what they can and cannot do.
  - **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 those that are seasonal employees. This means they no longer need (or should) access 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: • 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: • 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.
- **Site**: This should show the User's default site (beneficial for those with multiple offices).
- **Default Business Type** – The Business Type will default for the user when creating a new client file. It will be the business type that is in the Client's Account Information section. This will also default for new client appointments. For those with multiple offices, the business type helps when staff are scheduling appointments for each other.

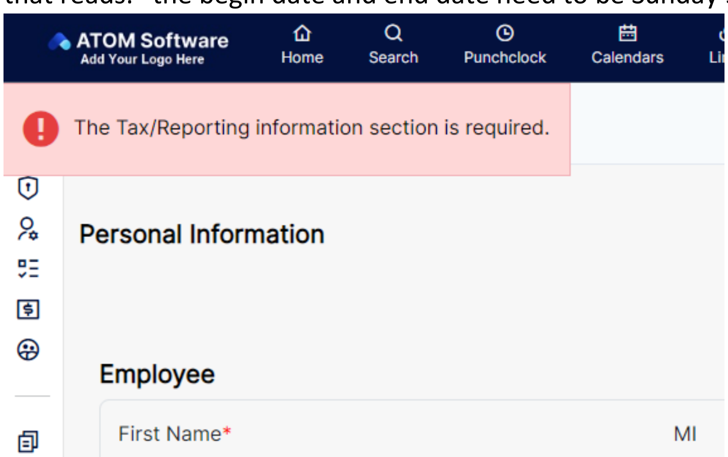
- **Default Account Type** – This Account Type will default in the Client's Account Information section when a new client file is created.
- **Experience**: Indicates the User's experience level (helpful when scheduling appts.).
- **Individual/Business** – When a new client file is created, this will default the file to be added as an Individual or a Business contact in the Contact Information section. For Example, if the User prepares predominately individual tax returns, then Individual should be selected for this option.

Be sure to click Save after entering the data for each of those fields, this will create your new User file.

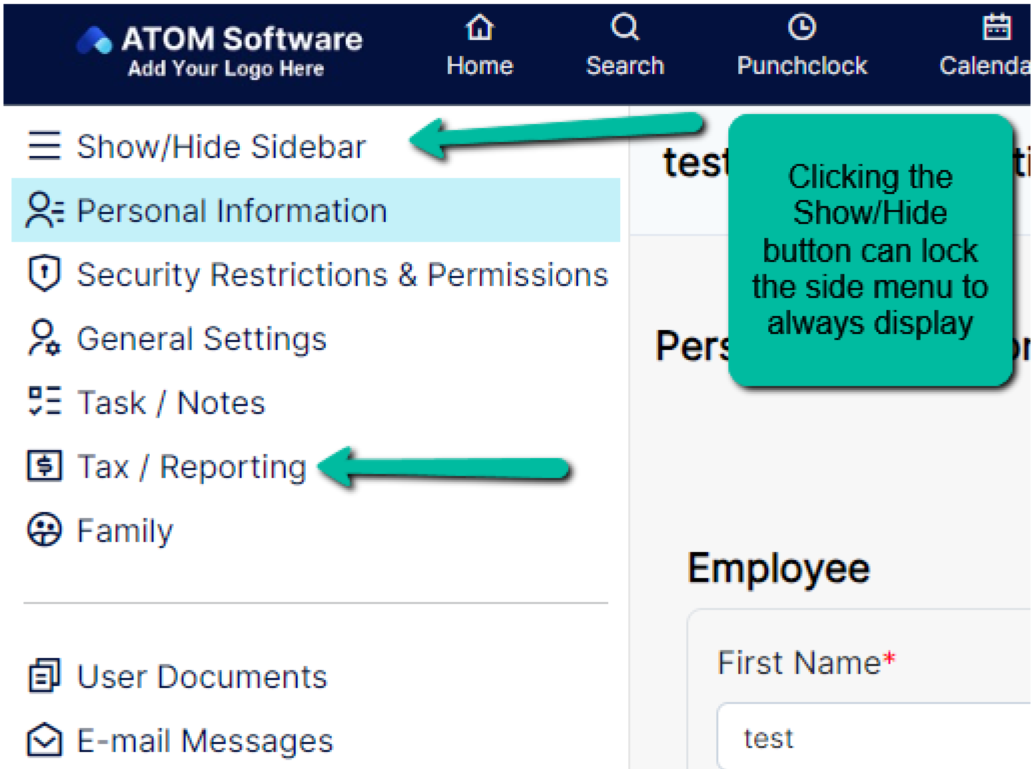


4.2 Tax / Reporting Information section

Once the Personal Information for the User is saved, you will get a red message that will scroll at the top-left of your screen that reads: "the begin date and end date need to be Sunday's".

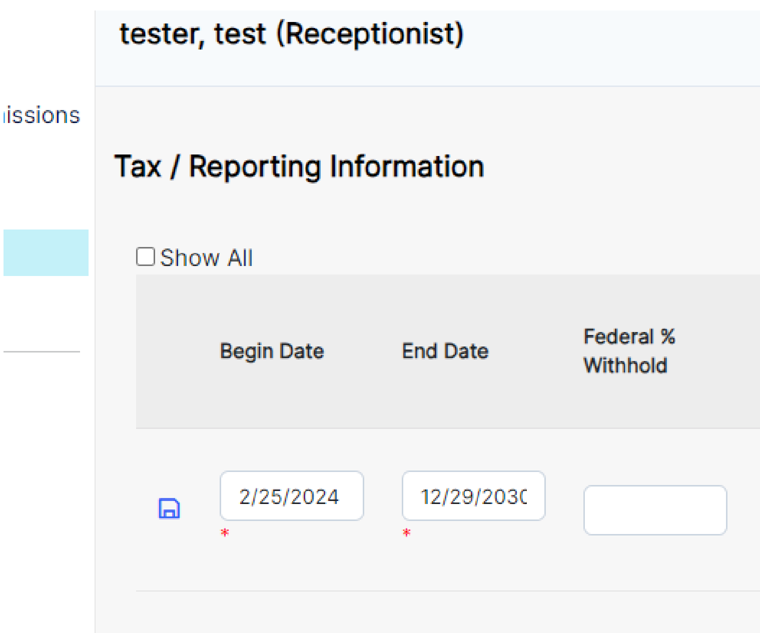


This refers to the Tax / Reporting Information section that you can find by moving your cursor to the left of the page and clicking on the section called Tax / Reporting.



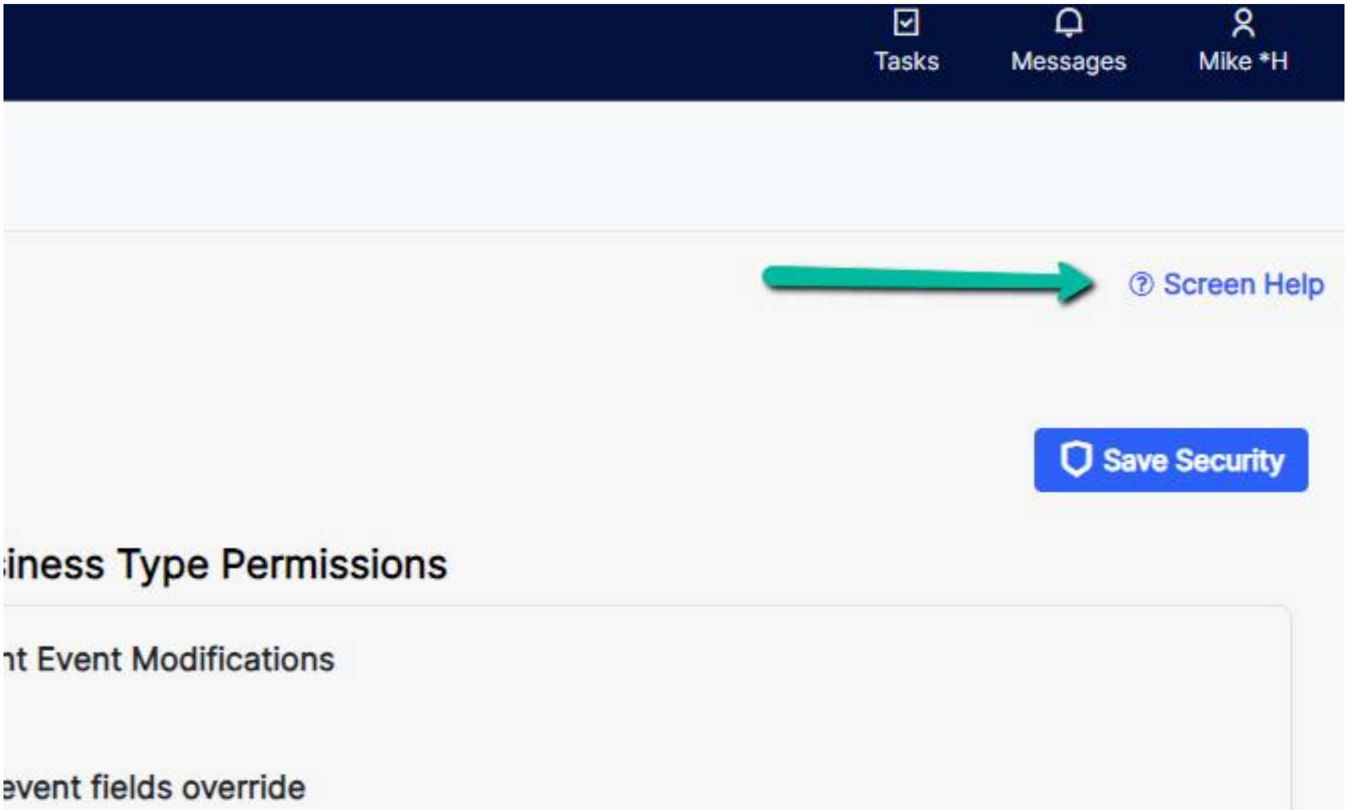
On this page, the Begin Date and End Date has 2 functions in ATOM. 1. If you decide to use ATOM for your employee's payroll, you will want to select Sunday dates that cover one year at a time. This will help you have record of hourly pay rates and if they get raises. 2. The dates also help for reporting purposes in ATOM. These dates are necessary to have the User's name appear in the listing of reports that require you to select Usernames. Keep in mind that if no dates are selected, their name will not show up as an option on any report that requires a User.

NOTE: Both the Begin and End Dates need to be Sunday dates. Be sure to click Save after you've entered dates.



4.3 Security Information Section

Another section in a User file you should become familiar with when starting out is the Security Restrictions & Permissions section. This section has various settings that affect how the User interacts with the software. If you want a definition on what every setting does in this section, you can click the ? Screen Help located at the top-right of that section.



5 Searching for a Client

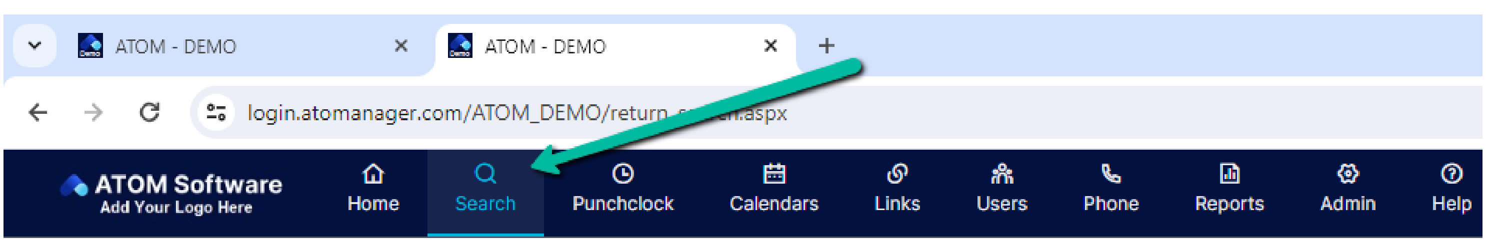
Video: [Getting Started - How to Search for a Client]

After you've finished adding Users, you will want to familiarize yourself with the layout of a client file.

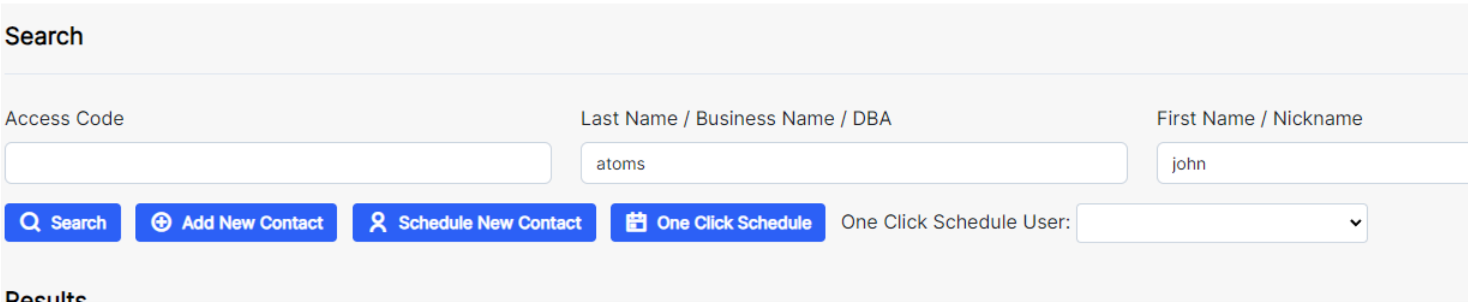
Each client will have their own client file. Client files will hold notes, communication logs with the client, workflow statuses, transactions, and documents that pertain to the client. When we first set up your unique ATOM site, you will only have two clients in the system – John Q Atoms (test file) and ATOM Software (our contact information).

5.1 How to Access Client Files

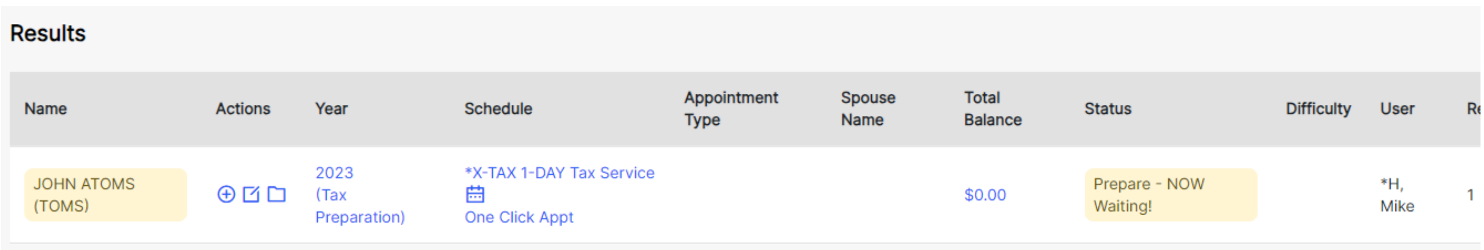
Once we have your most current client list in your system, the best way to find your clients is to start with the Search tab.



After clicking Search, you will see the Search Criteria screen. This is where you can search for your client. By default, you will see fields for Access Code, Last Name / Business Name / DBA, First Name / Nickname, and Phone Number. You can click on the “Advanced Search Filters” banner to expand the search criteria and be able to search with other options. While it’s usually best to correctly enter what you’re searching for, the software can find partial names and if you’ve added a space at the end of a name. We will be using John Atoms’ file as an example.



After typing your client’s information, click Search. You will now see your Search Results for your search query.

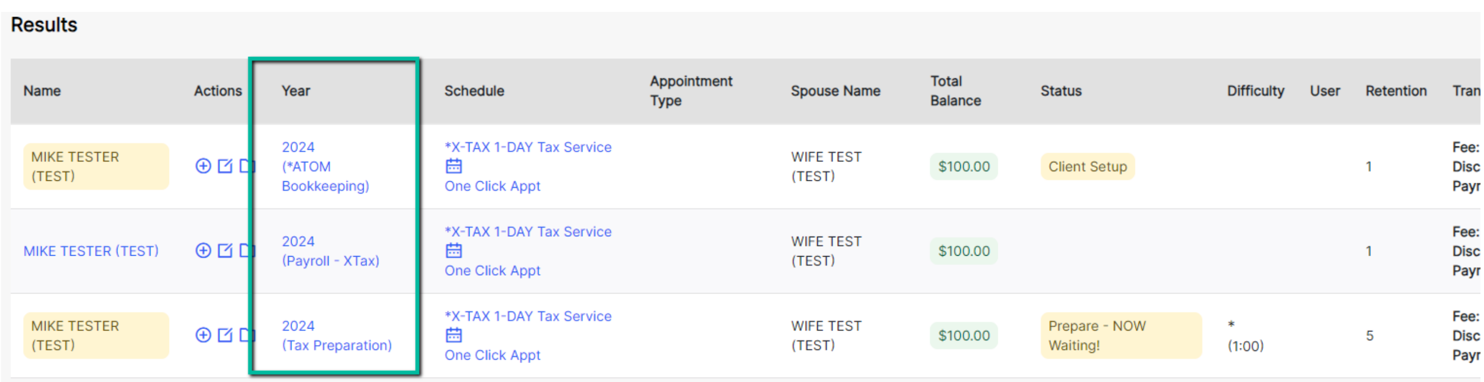


The Search Results will show information pertaining to the client’s most recent year. Clicking on the client’s name will take you to their client file. You can click on other things like the Year or the balance and that will take you to that particular section of the client file.

6 The Client File

Video: [Getting Started - Adding a New Client and Client File Overview]()

A client file can have several Account files in it. For example, if you have a client that you do both taxes and payroll for, you will have one client file but separate Tax Prep and Payroll Account files that exist within the client file.



A client file is separated into different sections that each have their own sections within. The following information is a brief overview of the different sections.

6.1 Contact Summary

Contact Summary is a snapshot of the entire client. Anything that is important going on with the client file will appear as a clickable “card” that displays the information. Clicking the card is a shortcut to the section that contains the information.

6.2 Contact Information

Contact Information moves across all the Account Years and Business Types for the client. It contains Name/Address, Perm Notes, and Appointments.

6.2.1 Name/Address

The Contact Information section is broken into a few different areas. These areas are: Primary, Spouse, File Settings, Primary Address, Secondary Contact, and Secondary Address. Primary and Spouse contain information like name, Access Code/SSN, Email, phone numbers, portal password, and Esign PIN. The Access Code is very important. It is a unique identifier for the client in the software. We recommend using a client’s SSN or EIN for this field. As long as the value is unique, it can be anything. For new clients who may not want to give their SSN yet, you can use their Cell Phone as a value for Access Code.

File Settings contain various settings that impact some of the software features and how they interact with that specific client.

Primary Address and Secondary Address store information regarding the client’s address. While Secondary Contact contains the contact information for a second contact in the Client File.

At the top-right of the section there are a couple buttons called “Actions” and “Links” that lead to different software functions. A couple important ones to learn when starting out are:

- **Permanent Documents** – This is where you can store documents that do not pertain to any particular year or business type. Forms of ID are great here. Permanent Docs are shared across all Account files for the client.
- **Client Portal Messages** – You can access your portal messages with this client from here. You can also compose a new one from this section.

6.2.2 Permanent Note

The Permanent Note section can be viewed as a “sticky note” on a client file. Whatever you type in this section, it will be displayed to whoever enters this client file. Useful for keeping notes on clients that you want to remember year after year. The Permanent Note is shared for all Account files for the client.

6.2.3 Appointments

This section will display all the appointments that the client has scheduled. You can also schedule an appointment from this screen.

6.3 Account Information

Account Information houses settings and functions that pertain to that particular Account Year. Account Info contains Details, Events, Transactions, EF Data, and Tasks / Notes.

6.3.1 Details

This section displays important information that just pertains to the Account file that you are looking at. If you are looking at a Tax Prep file, you will see that the Business Type will say Tax Preparation. The Year field will display the year for the file. Tax Prep would be the return year while other Business Types would usually be current year. You can also track what Account Type the file is, what kind of Referral they are, what User the file “belongs” to, the date the Account file was created, etc.

The Details section also has connections to Account Documents and Client Billable Time through the “Actions” and “Links” buttons. Account Documents is also used to store documents that pertain to that particular file. You can use this to store the client’s W2, setup files for E-sign, and upload their Tax Return.

6.3.2 Events

Office Events are used to keep track of what part of the workflow your client is in. Users can move clients to different events from this section. These events can have notes, assignments, start and due dates, and notifications that can be sent from them. *We’ll go over how to move a client throughout the workflow later.

6.3.3 Transactions

The Transaction Information section is where you can create fees, payments, adjustments, and discounts for your clients. This can be used to simply keep track of transactions with clients even if you use other tools to invoice and record payments. You can also setup Credit Card and Echeck payments if you have a Merchant account with Authorize.net (see ?Help > Make On-line Payments Through ATOM for more information). You can also send out/print invoices from this section as well.

6.3.4 EF Database (for Drake and Crosslink Users)

This section is for our Drake and Crosslink Users. This is where imported EF data is sent to. This is useful information to be able to have on hand if you get inquiries from clients.

6.3.5 Tasks / Notes

You can use the Tasks / Notes section to create any task or note that pertains to the Account file but not necessarily the workflow (Office Events). You can leave phones messages here, tax planning questions or notes, or whatever else you think would be a good note about the client.

6.4 Documents

This section has direct links to the Account Documents and Permanent Documents pages.

6.4.1 Account

Account Documents is used to store the documents that only pertain to that specific year and Business Type. Things like W2s, Tax Returns, bank statements, etc. You can view all the documents for the year you are in and upload more documents by clicking the “Add” button.

6.4.2 Permanent

As mentioned above, Permanent Documents are documents that are shared across all Account Year and Business Types. Documents like Driver’s License and other forms of ID are good things to store here. You can view all uploaded Perm docs here and upload more by clicking the “Add” button.

6.5 Communications

This section contains records of communication between you and your client and allows you to create messages to send to. It’s separated into Calls, Texts, E-mails, Portals, and Prospects. By default, you will only see Portals and Prospects. Calls, Texts, and E-mails will only display if you have signed up for that ATOM feature.

6.6 Other

Other contains Favorite Links, Linked Clients, and All Years.

6.6.1 Favorite Links

This section can house links that lead to outside websites or documents. These can be set up with the Links tab at the top of your software. *We have another guide on this that goes into more depth.

6.6.2 Linked Clients

Linked Clients is used to link two existing clients together in your software. You will need to click the "Add" button. This will open a search where you can find the client that you would like to link to this file. Once you've searched for your client, you can use the two fields to describe the relationship between the two and set it if you want one to have access to the other's client portal or allow both to access each other's client portal.

6.6.3 All Years

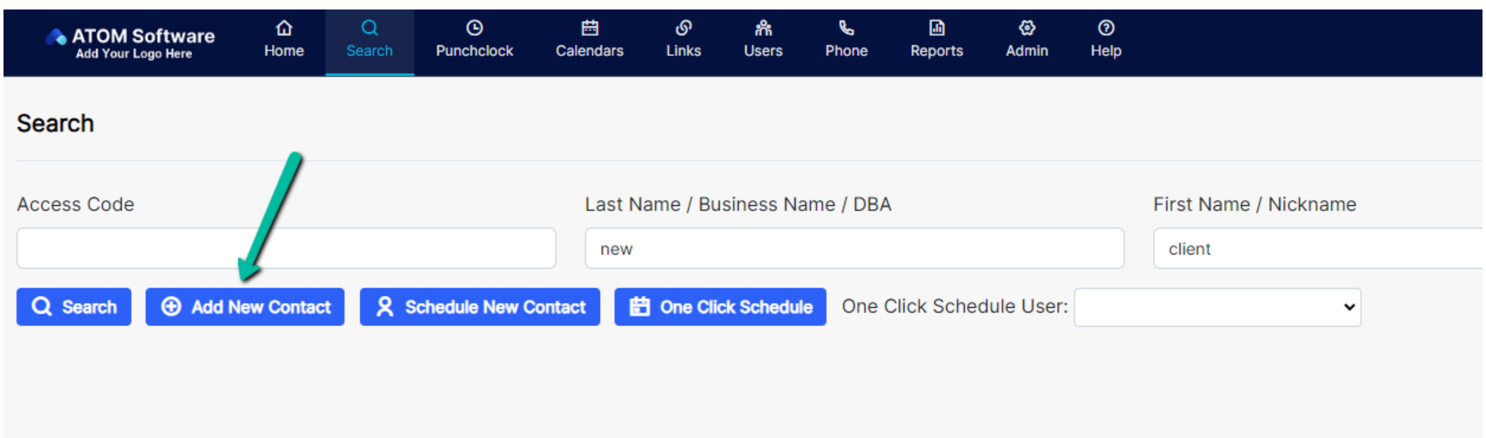
All Years is used to see all other Account files this client has. You can see useful information pertaining to those other Accounts like if they still have a balance or access their documents for that Account.

There is a lot going on in a client file. It will take some time to get comfortable with every section so take to learning this at your own pace.

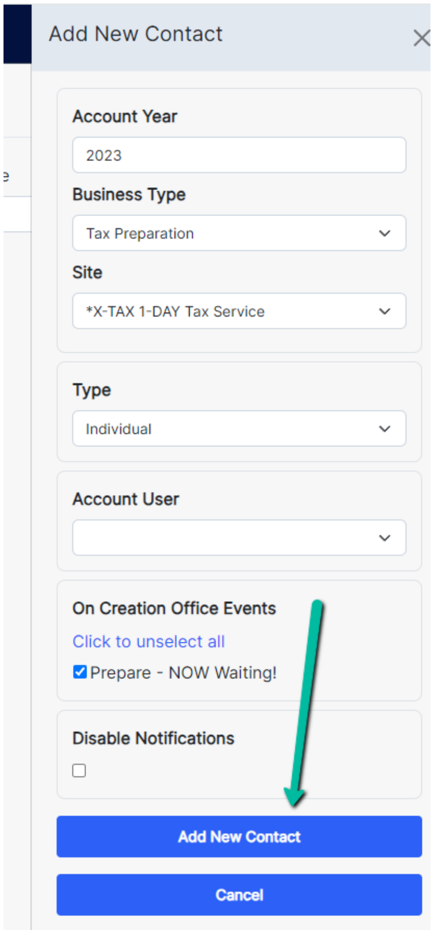
7 ADDING A CLIENT

Now that you know how to search for an existing client file and what you can see inside a client file, we will be going over how to add a New Client file into your database. This is for anyone that will be brand new to your office and you would like to start keeping track of notes and your workflow for that individual or business.

Start with the Search tab and search for the first and last name of the new client. Once you've entered their name, click Search. You will likely see a message across the screen that says, "No Records Found" but if their name matches another client's that is also fine. You will then want to click the Add New Contact button.



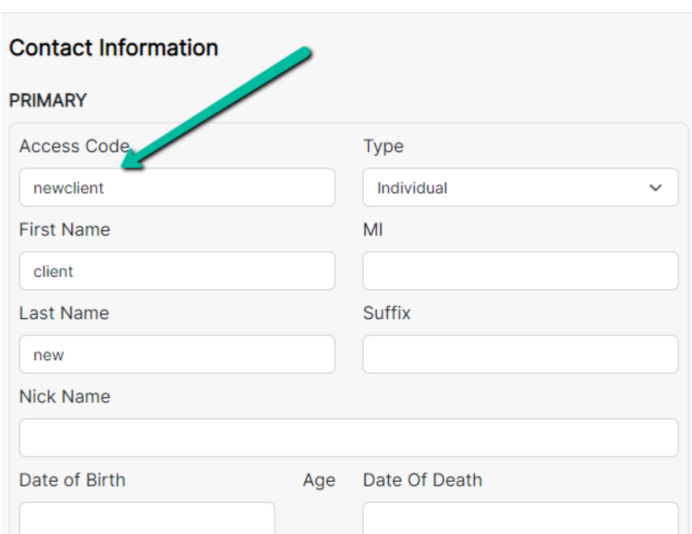
This will open the Add New Contact pop up box. This will give you the basic information on what kind of Account file you are creating for this client. Keep in mind that the "On Creation Office Events" check box is telling the system to add your client into your first step of your workflow, which is typically the Lobby status once you save the new client file.



Once you have selected the Account Year, Business Type, File Type, and Account User, you can click Add New Contact to open the new client file.

NOTE: The file isn't fully created yet, you still need to do a couple of steps to be able to save the client file into your database.

Next, you will need to enter a value in the client's Access Code field located in the Contact Information section.



As mentioned earlier, the Access Code needs to be unique for every client in your software. We usually recommend using the client's SSN or EIN, that way it matches the tax information. You will run into situations where the client might not want to give out their social security number. This typically happens when they are talking to you on the phone. In this case, you can use their last 4 digits of their SSN or their cell phone number. Once the client comes into your office, you can adjust the Access Code to match their SSN. ATOM just needs the value to be unique for each client that is saved in the software.

Once you've added an Access Code, as well as any other contact information you have for the client, you can click the Save button in the top-right corner. This will create the new client file.

NOTE: It is beneficial to type in their email address and/or cell number in the Contact Information section so you can communicate with the client within ATOM.

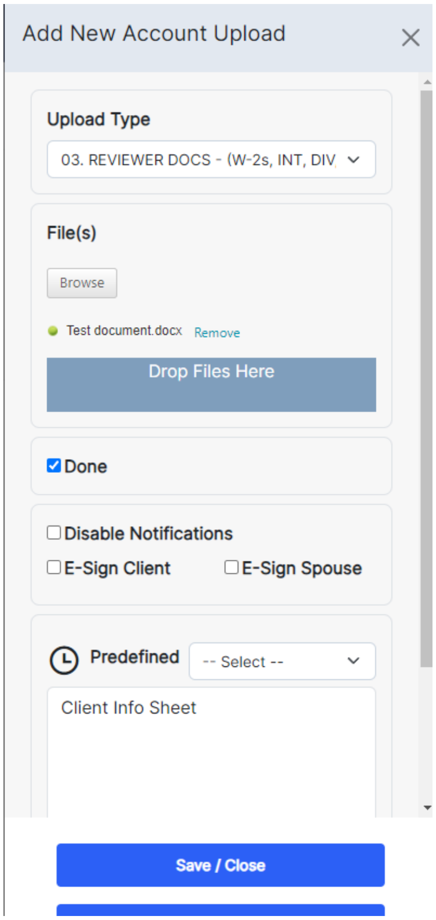
8 Storing Documents

We talked about it briefly above. But there are two different places where you can store your client's documents. You will find the Permanent Documents as its own section and as a link inside the Contact Information section. And the Account Documents has its own section as well as a link inside the Account Information section. Uploading a document is very similar in both sections, but each have their own differences.

Permanent Documents is typically used for any upload that pertains to the client file, rather than a particular account file. Perm Docs is shared across all account files for the client. Examples of Permanent documents are Taxpayer ID, Spouse ID, Social Security Cards, and/or Dependent identification documents. While Account Documents are only for the account file you are looking at. Examples of Account documents are W2s, 1099s, any supporting document, any document that the client might have signed, copy of tax return, and copy of IRS letter.

Documents are uploaded the same way in both areas. Select the area where you want to upload (either Perm Docs or Account Uploads and click the Add button. You can Browse or use the Drag and Drop to upload the document. Keep in mind that the document will have to be saved on your device before being able to upload it into ATOM. Then select an Upload type (this will help you distinguish what document you saved). The description box is available for extra notes or details about the upload. File Access is used so you can determine what uploads will be available for the client to see in the portal. When finished, click Save/Close.

Note: There are more options that each section can do (like expiration dates on IDs, E-sign, Upload Notifications) but you will learn more about those as you continue with ATOM.

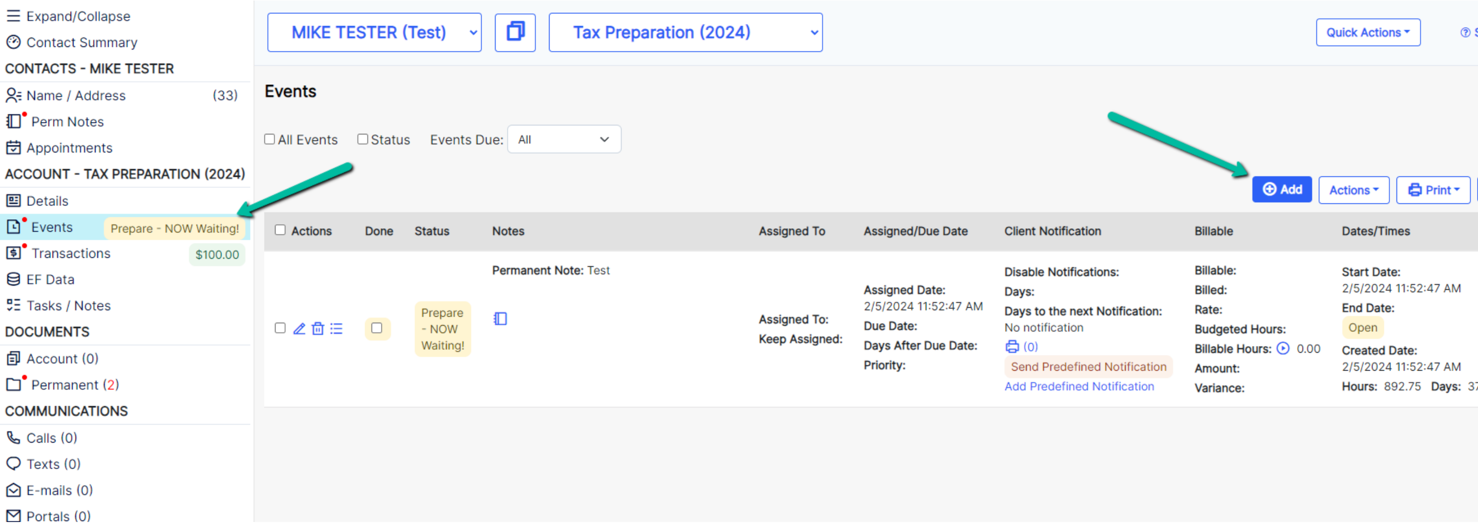


9 Adding a Client to an Event Status (Workflow)

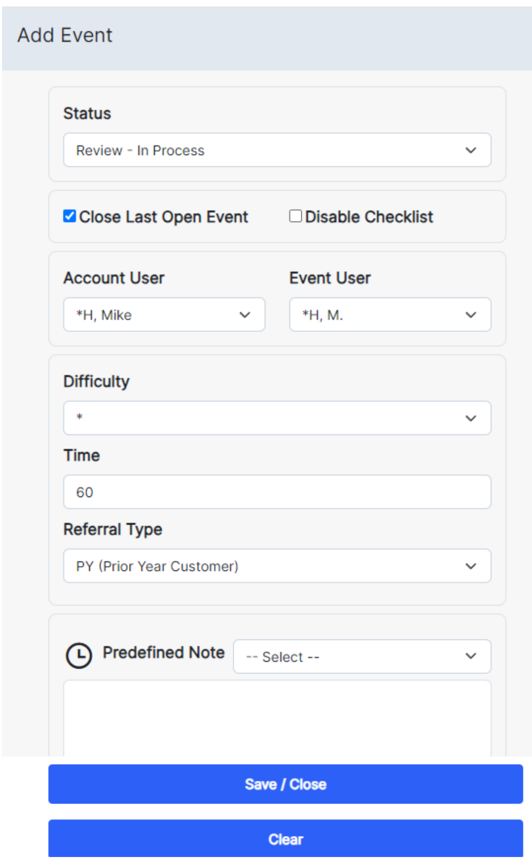
The Event Statuses are used to keep track of your client files. This helps you track where in the workflow the file is at and it's also a place to leave notes or tasks associated with the statuses. Here is a quick overview on Event Status, but we highly recommend that you set up a training session with an ATOM Support member to get a strong understanding of how the workflow is used and how to customize it to fit your office.

9.1 Adding an Event Status within the Client File

To add an event to a client file, or to move the client to a different event, you will need to go to the client's Events section. From there, you will see what event the client is currently in, if they are in one.



To move the client or add a new event, you will need to click on the Add button. This will pull up a new menu where you can select the event you wish to move the client to. You can also set up other settings in this event like Assigned To or add a note. Once you're ready, click Save/Close to add your event.



10 What's Next?

Getting Started covers a lot of basic information. The topics we covered are good starting points for getting a firm grasp on how the software works. There is still A LOT more that ATOM can do, and we have other guides that cover that. You can always contact us to schedule a one-on-one screenshare training session. We highly recommend having Workflow training after this Getting Started session. This way we can help you customize your Office Events (workflow) to reflect how you run things in your office. The more you access ATOM, the more you will run into other functions that might interest you. Feel free to send us a portal message, E-mail, text, or call us to set up additional training. We are always happy to help!