Features

- All-Inclusive Software Application
- Assigned Tasks & Follow-Up/Reminders
- Automated Refer-A-Friend Program
- Billing/Invoices
- Client Portal
- Compatible with All Tax Preparation Software
- Complete Functionality Across Multiple Locations
- Completely Web-Based (Cloud)
- CRM
- Document Management Storage
- Electronic Signatures
- Employee Portal
- Instant Client Messaging / Notifications
- Integrated Schedules
- Kiosk Self-Service Check-In
- Lobby Tracker
- Payroll (Integrated with Punch Clock)
- Productivity Tracker
- Referral Tracker
- Time & Billing
- Unlimited Users
- Workflow for Multiple Business Types
- Document Recovery (PRO)
- Email (PRO)
- Faxing (PRO)
- Text/SMS (PRO)
- VoIP (PRO)
- Credit Card/ACH processing

Pricing Plans

Starter

Perfect for managing your tasks, clients, and employees.

$167

per month, billed annually
or $199 billed monthly

Pro

Ideal for firms that prioritize client and team communication.

$225

per month, billed annually
or $269 billed monthly

For more information regarding pricing, please visit: atomanager.com/pricing

Ready to signup?
atomanager.com/signup

#1 Solution

Practice Management Software For Tax Offices, Accountants, and Bookkeepers

ATOM Software

www.atomanager.com | 517.940.8745

Take your office to the next level with ATOM Software.

Appointment Scheduler
Allow customers to request or schedule appointments. A single calendar for all your services.

Billing & Invoicing
Streamline revenue tracking, payment processing, and client balances effortlessly.

Client Portal
Empower your clients with a dedicated portal where they can access important information, updates, and project details in real-time.

CRM
Automate routine tasks, manage leads, and nurture client relationships, all within a user-friendly interface to optimize efficiency.

Document Management
Easily track and access client files electronically. Be a paperless office.

Project Tracking
Monitor progress, set milestones, and collaborate seamlessly, ensuring projects are completed on time.

Punch Clock
Record employee and client billable hours.

Secure File Sharing
Share documents and files with confidence using our secure file sharing feature.

Task Assignments
Centralize and manage all your tasks for improved productivity.

Unlimited Users
ATOM gives your entire team access without per-user fees – so you can scale your business without increasing costs.

Workflow
Automate routine tasks, manage leads, and nurture client relationships, all within a user-friendly interface to optimize efficiency.

Document Recovery (PRO)
Quickly restore lost documents and gain peace of mind knowing your data is safe.

Email (PRO)
Manage emails from a shared inbox, keeping communication organized. Messages are stored in client files.

Faxing (PRO)
Send, receive, and store faxes directly in client files. A shared inbox keeps everything easy to manage.

Texting (PRO)
Send, receive, and manage client messages from a shared inbox – no personal phones needed.

Voice, VoIP (PRO)
Send, receive, and manage calls from a shared inbox, keeping all communication organized in client files.

Credit Card/ACH Processing
Integrated payment processing inside client files or via contactless terminals. Clients can also pay on their own through the Client Portal.