



accountantsdaily
strategy week
2020

ATOmate the ultimate
ATO document and
communication solution

<https://businessautomationworks.com.au/>

Automation, why?

By streamlining your process, you will **improve productivity** and **strengthen client engagement** and **improve staff retention**

Who wins?



Compliance and tax are important. **BUT?**

BUSINESS IS ABOUT PEOPLE
NOT PAPER



What do your clients really want?

You and Your



ADVICE



SUPPORT



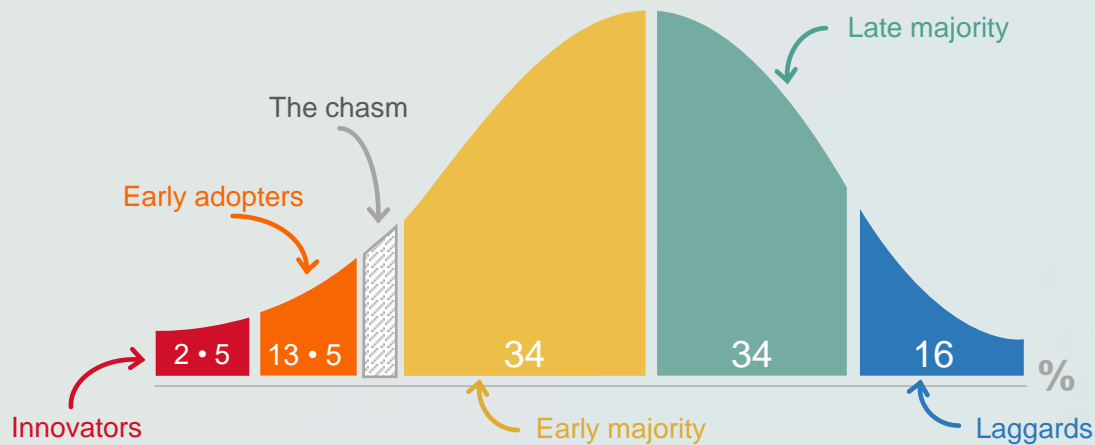
COMMUNICATION



The question is how do you create the time to **focus on the delivery** of your client needs

Make time, by adopting technology

DIFFUSION OF INNOVATION



Robotics + People = the practice of the future



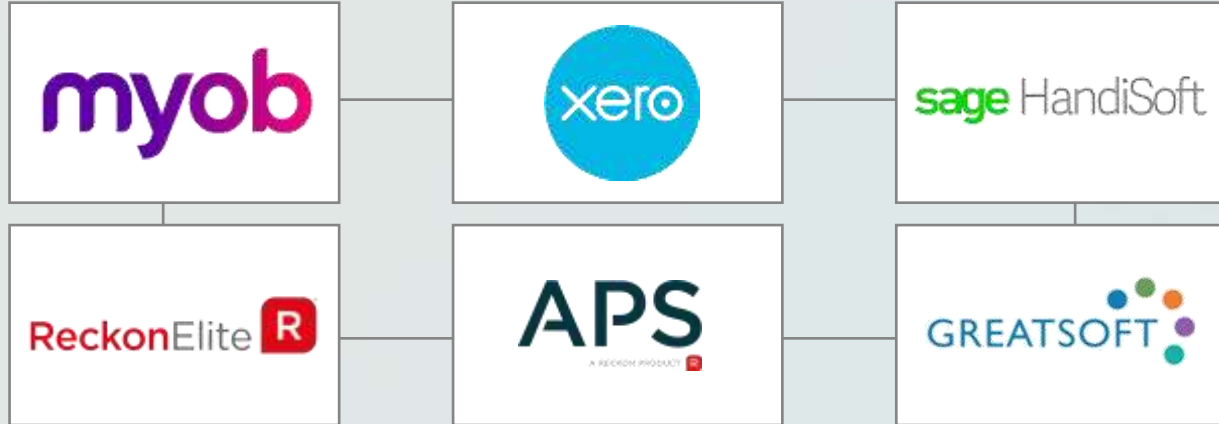
The logo for ATOmate features the word "ATO" in a bold, black, sans-serif font. A blue arrow points upwards and to the right, passing through the letter 'A'. The word "mate" is written in a blue, lowercase, sans-serif font.

**Automated ATO document
processing for accountants**

Your new best mate

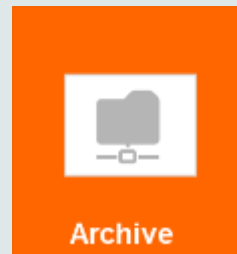
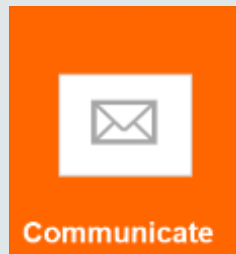
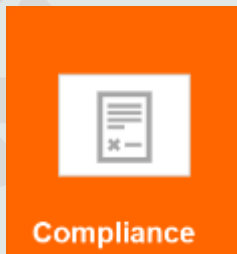
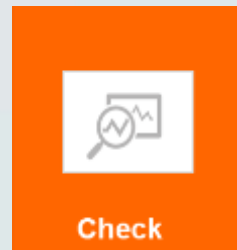
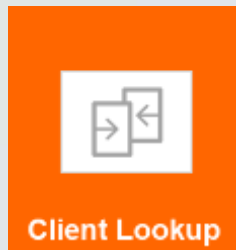
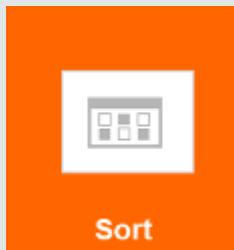
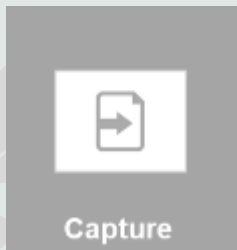


ATOMate automates processing of ATO documents by integrating with many Practice Management Systems



ATOmate



automating the process of





COMPLIANCE

Automated TFN Redaction

		Australian Government Australian Taxation Office
MR STEVEN WHITE PO BOX 1234 ENDOR EN 1111	923	Tax period ending 30 June 2018 Tax file number [REDACTED] Date of issue 09 October 2018 Our reference 311 215 926 5849 Internet: www.ato.gov.au Phone enquiries: 13 28 61
Notice of assessment - year ended 30 June 2018 <i>Income Tax Assessment Act 1936 and Income Tax Assessment Act 1997</i>		



COMMUNICATE

Client Communication



Default
templates
are provided

Or



Fully
customisable
to your Practice
requirements

From: reception@accountant.com.au

To: Paul@gmail.com

Subject: Notice Of Assessment

Attached: Notice of Assessment - 2013 - Paul Salcombe.pdf (2 MB)

Hi Paul,

Attached is your Notice of Assessment for the 2013 financial year.

The outcome of your 2013 assessment is **\$2,083.71 refund**.

The calculations resulting in this assessment have been checked and are correct.

If your refund has not already been deposited into your nominated bank account, it will be deposited within 7 days.

If you have any questions please don't hesitate to contact us.

Regards,

<your name>
<your firm name>

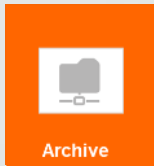
Your email signature goes here

Your Practice email address



Approval and Review Dashboard

The screenshot displays the ATOMate web interface. At the top, there is a navigation bar with 'ATOMate' on the left and 'DASHBOARD', 'TEMPLATES', 'REVIEW QUEUE', 'APPROVAL QUEUE', 'USERS', and 'SETTINGS' on the right. Below the navigation bar, a header section indicates 'Documents for Review' with a red notification icon and a 'Refresh' button. A sidebar on the left lists various documents with their titles and dates. The main content area features a red warning banner: 'Your practice settings require this document to be reviewed.' Below this, the document title 'Failure to Lodge Activity Statement On Time' is shown. The document details include the name 'Jonathan Smith', email 'javis@asmbs.com.au', and subject 'Your Activity Statement was logged late'. The body text of the document is visible, starting with 'Hi John, Please see attached notice from the Australian Taxation Office...' On the right side of the document, there are buttons for 'EMAIL', 'PRINT', and 'ARCHIVE'. At the bottom of the document view, there are buttons for 'ADD FILE NOTE' and 'ESCALATE', along with a note 'Maximum upload size: 5 MB'.



Archiving

ATOMate

Document Management Systems

myob

nimbus+
PORTAL SOLUTIONS

Dropbox

SharePoint



sage HandiSoft

iManage

HowNow

VirtualCabinet

SuiteFiles

Network Folders

+
More



Is this **you** or your **admin team**?



Automating Routine reparative tasks AND THIS IS WHAT YOU GET.



Questions?

CONTACT US
www.atomate.com.au

