Tax & Accounting

ATX™ Customer Support Website User Roles and Functions

Function	Administrator Role	Manager Role	User Role
Create users and manage "roles" for support staff	●		
Modify Account Information including contacts, e-mail address and phone numbers	●		
Enroll and verify Bank Products	●		
View and modify payment methods, billing, fees, or other financial issues	●		
Modify Business Owner and EFIN Owner information	●	●	
Use Online Check Printing (if applicable)	●	●	
View and print reports	●	●	
Add or update EFIN information	●	●	
Download ATX Software	●	●	
Check the status of e-filed returns	●	●	●
Download updates and utilities	●	●	●
Search the Knowledge Base	●	●	●
Access tax research (if included in your tax package)	●	●	●
Access the Support tab including Calendars, Charts and create and view Support Cases	●	●	●
View ATX Blog and Latest News	●	●	●
Access ATX communities	●	●	●