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Home Page Overview

The home page provides a snapshot view of the office while summarizing what the logged-in User may be responsible for or need to be aware of. In addition to the three main sections of your Home Page, there are Summary Links and Filters which cover vital information. Also, each section has a designated icon, and Show/Hide arrows have been added in areas to allow the User to minimize what they see on the Home Page. Show/Hide may be especially helpful for Users with responsibilities that do not entail Workflow or Portal duties so they can focus on what is important to them.

Field Descriptions

Field Descriptions will describe your Home Page going from Top to Bottom, Left to Right.

Header Alerts

Users can turn on header alerts that appear above ATOM's primary information section (Centered Information in white box) to let them know important information. Three of the four notifications are optional and can be configured in the ADMIN>User Page for each User.

Messages

This alert was designed so a User can see when an internal ATOM Message has arrived in their Inbox. The "You have # new message(s)" notification will appear at ATOM's top left corner when new messages have come. This alert is also a Hyperlink and when selected, will take the User to the Inbox.

NOTE: This alert is *not* optional and appears for any ATOM User.

Lobby Count

This alert was designed so a User can see when Clients have checked in to the "Lobby System Event Status" (you may have another Custom Name for this status) within your Workflow. This function can be helpful for managers looking to stay informed on the traffic volume of your office(s) or for users to know when your office may need them to address a "full lobby" and help if not currently busy. The Alert will display the “Customized Event Status Name” (#/#) (Appointment Type if enabled) to tell you which status the file is in and how many are waiting. It will appear in the middle of your ATOM Screen. This alert is also a Hyperlink and when selected, will take the User to the Lobby System Event Status Group within your Workflow.

NOTE: The Fraction (A/B) denotes:

A. The number of clients who have been in the Lobby Status for over 30 minutes.

B. The total number in the "Lobby."

Exp: Lobby (1/5) tells you that there are five clients in the Lobby Event Status, and one has been in that status for over 30 minutes.

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SETUP: This alert is optional and can be enabled in the ADMIN>User Page>Security Information>Display Lobby Record Count on Header.

VoIP Phone Queue

This alert was designed so that a User can see when your ATOM VoIP Phone Queue has calls waiting to be answered and how long they've been in the queue. The Alert will display as "# call(s) waiting in the queue (00:00 mm:ss)

SETUP: This alert is optional and can be enabled in the ADMIN>User Page>Security Information>Display Task Router Summary On Header.

User Appointments or Walk-Ins

This alert was designed so Users can see when their Requested Appointments or Walk-In Clients have arrived in the Lobby and how long they have been waiting. The alert will display in the top right corner of ATOM and show "Your HH:MM AM/PM appointment is here. (hh:mm)" or "You have a Walk-In Request. (hh:mm). This alert is also a Hyperlink and when selected, will take the User to the Lobby System Event Status Group within your Workflow.

NOTE: Walk-Ins assigned to a particular User are set when Clients are added to your "Lobby System Even Status" without a Requested Appointment on your ATOM Scheduler, but a User has been added to the Account User field for the Client.

SETUP: This alert is optional and can be enabled in the ADMIN>User Page>Security Information>Display Current Appointments On Header.

Summary Links

Summary links are a collection of live report links that give more details about your office without running a full report. These links can produce data about a specific date or date range.

Call Summary

ATOM VoIP Users can use this summary link to view the User Call Log for a date or date range. The User Call Log Summary will show the individual User Call Log, Hourly Call Log, Call Type Log, Client Call Log, and Voicemail Messages.

Office Event Summary

This summary link can show you detailed information about your Workflow over the course of the day or selected dates filtered by Site and Business Type. By choosing an Office Event(s) and Day(s), this report will produce data summarizing the User, Client, hours, and associated billing rates.

Checklist Summary

This link will summarize your **closed checklist** items by date or date range by selecting an item from each area.

Communication Summary

This summary report shows detailed information about your Users' communication actions on a selected date or range, summarizing User Communication totals, Clients, hours, and billing rages associated with each activity.

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Page View Filters

The Home Page View Filters allow you to filter or "flip" between your ATOM Business Types, Sites, and Event Start Dates. Users who manage or work between different workflows or office sites may find this especially useful.

Business Type Filter

The Business Type Filter allows you to "flip" between your active Business Types' Office Events View. For example, a User who was doing a tax return in Tax Prep that now needs to run Payroll for the month can use the pulldown to change the Workflow view by selecting Payroll. Likewise, a manager can quickly move back and forth between Workflows to keep an eye on what is happening in the office.

Site Filter

ATOM Users with more than one site can use the Site Filter to "flip" between your other offices to view the appropriate Workflow (Office Events) for each location. Cross employees and Managers can utilize this feature to work from any Site and still have access to the information from all offices.

View Office Events by Start Date

The View Office Events by Start Date always defaults to the current Date to show your real-time information about your Workflow (Office Events). The Start Date of each Office Event determines its visibility on the Home Page within your Workflow. Some Business Types used in ATOM, like Payroll, benefit from creating Office Events with a future start date. Using this filter, with a future date selected, allows a User to see files that will Start in the future.

Exp. A User finishing this week's Weekly Payroll files will close all events with this Monday's Start Date, zeroing out the Event count next to Weekly Payroll on the Home Page. They can add NEXT Monday's Date in the View Office Events by Start Date, and the Home Page Events will display the clients in the Weekly Payroll Event as it will appear on that Monday.

Office Events

Your Office Events display your created Workflow for the current Business Type view. The Office Event number, in parenthesis, denotes the number of Client Files that have been added to that event. A fraction next to any Office Event indicates files designated for the logged-in User over (/) the total number of files in that event.

User Overview

The following sections are associated with the User currently logged in to ATOM. So when users access ATOM under their User Login, they only see the information designated for them, not the entire office.

Assigned Tasks

Users will find any ATOM Task/Note, Office Event, Portal Communication, or User Task/Note assigned here. Any New (unread) Assignments will appear as NEW in red, and the total number of Assignments will appear as a number in parenthesis (#).

Messages

Users will find any ATOM Internal Message or System Message (auto-generated by ATOM) here. The total number of Any New (unread) Messages will appear as NEW in red, and the total number of Messages will appear as a number in parenthesis (#).

Appointments

The default view for the User Appointments is for each User's *Requested* Appointments. Therefore, the total number of Any New (unviewed) Scheduled Appointments will appear as NEW in red, and the total number of Appointments will appear as a number in parenthesis (#).

NOTE: The My Appointments page allows users to Display Appointments for Today, Next 7, Next 30, or All Days. The visible NEW and total numbers are affected by the time scale selected.

Work Schedule

The default view for the User Work Schedule is for each User's *Verified* Work Schedule Days. Therefore, the total number of Any New (unviewed) Verified Workdays would appear as NEW in red, and the total number of days will appear as a number in parenthesis (#).

NOTE: The My Work Schedule page allows users to Display Work Schedule for Today, Next 7, Next 30, or All Days. The visible NEW and total numbers are affected by the time scale selected. The My Work Schedule page will also allow the User to change the selection. If changed, the Home Page will display the visible counts for the selected User and not the logged-in User.

Last Files Visited

This section will display up to the last ten files the User has visited within the current filtered business type. The List can be Hidden (with the down arrow) when appropriate or cleared using the "Clear Last Visited" link.

SETUP: This feature can be enabled or disabled in the ADMIN>Users>Security Information>Enable Last files Visited To Display On the Home Page.

Favorites

This section will display files that the User has designated as a favorite so they can quickly move to the file without having to search. Favorites can be set or removed by selecting the "Mark as Favorite" box in the Account Information section of the client's file.

Office Communications

Your Office Communications section of the Home Page includes standard and additional Client communication logs. Your ATOM Software suite includes our secure Client Portal and Prospect Portal, but clients can also opt to add Add-on communication gateways for Texting, Email, Fax, and VoIP. Each additional log will appear and display your incoming messages.

Client Portal

Every ATOM User has an ATOM Client Portal. Every client in your database can access your Client Portal ***IF*** you've directed your clients to use it. Your client's account updates, messages, uploads, e-signatures, payments, appointment requests, appointment scheduling, and internal feedback will generate a Client Portal Message and display it here. **See your ATOM ?Help Menu link "My ATOM Links (URLs)" for a complete list of your included landing pages.*

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Prospect Portal

Every ATOM User has a Prospect Portal and Prospect Appointment options (landing pages) for prospective clients to be able to express interest in your business and send you a message, or request (or fully schedule) an appointment with your office. Prospect Portal links are intended for those who do not already have a client file in your database and therefore do not have access to your ATOM Client Portal. Prospect communication will display here. **See your ATOM ?Help Menu link "My ATOM Links (URLs)" for a complete list of your included landing pages.*

NOTE: ATOM Users who utilize the ATOM Social Media Feedback link will see “Negative Feedback” drop to the Prospect Portal when their clients have initiated feedback from ***OUTSIDE*** of their ATOM Client Portal. Only communication received from ***INSIDE*** the ATOM Client Portal will appear in the Client Portal Log.

Text

Twilio Texting is an additional communication option in ATOM. When added, you can directly text your clients and receive replies within your ATOM Software Site. All incoming text messages will display here. **See your ATOM ?Help Menu link "Twilio Texting in ATOM" for more information.*

Email

SendGrid Email is an additional communication option in ATOM. When added, you and your clients can directly email your clients and receive replies within your ATOM Software Site. All incoming email messages will display here. **Contact the ATOM Support team for more information.*

Fax

Faxing by InterFAX is an additional communication option in ATOM. When added, you can directly fax your clients or business contacts within your ATOM Software Site in the Account Documents Section. All incoming fax messages will display here. **See your ATOM ?Help Menu link "Faxing through ATOM with InterFAX" for more information.*

Voice

Twilio VoIP (voice over internet protocol) is an additional communication option in ATOM. This Add-on option allows you to make and receive calls within your ATOM Software Site. All inbound and outbound calls will display here. **See your ATOM ?Help Menu link "Twilio VoIP in ATOM" for more information.*

Data Import

Drake, Crosslink, and TaxWise Users can import EF Data from their tax software into the corresponding client file in ATOM (matched by SSN and Account Year). Ack Codes and EFile data are imported with specific links inside the Client File, on the System Event Status "Awaiting IRS Acks," or on the ATOM Home Page. The ATOM Home Page Data Import Link will appear here if your office can fetch EF Data.

Office Contact Information Summary

Your office's full contact information summary will now appear at the footer of your ATOM Home Page. This feature is beneficial when adding new numbers for Texting and faxing or for new employees to see all updated information quickly. This information is set in your ADMIN>Sites page and will display any corresponding, Phone, Text, Email, Fax, Website, and Address.