

Sign-up /Setup for Twilio Texting & VoIP

What is Twilio?

Twilio is a cloud communications platform, synced with ATOM, to enable enhanced texting and voice communication options for you and your clients. **If you have not already signed up for Twilio Texting we strongly recommend it if you plan to use Twilio VoIP.**

Twilio VoIP (Voice over Internet Protocol)

What is Twilio VoIP?

Twilio can also enable phone calls through your internet connection instead of a regular landline or mobile network.

Historically, unless you've been using a trackable call system, your office call volume and costs almost exist as a separate entity. Your expenses are locked in as they are a byproduct of just doing "business" because your clients must be able to contact you, and someone must be available to answer a call. By adding VoIP to your ATOM site, incoming calls are directly linked to your client database, and all call data is logged. VoIP incorporates the same management oversight you have over other ATOM client interactions while concurrently logging call times. Critical data can be reviewed in the Communication Summaries and Client Logs, where you can evaluate staffing needs or when extra charges should be applied to your services!

With VoIP, *anyone* logged in to your ATOM site can dial or receive calls. Automated messages can be set to "play" when a call comes in or when a call cannot be answered. Most importantly, your employees can provide customer support from *anywhere* they have an internet connection. We encourage you to contact ATOM Support to discuss your needs and answer your questions, but below, you'll find a few common discussion points and a 15-minute video.

[ATOM VoIP Demo:](#)

[Video](#)

[ATOM VoIP Basics:](#)

[Video](#)

How Much Does Twilio VoIP Cost?

ATOM Charges

There is an Add-On Fee to open and maintain the programming behind the VoIP system on your individual ATOM Site(s). Annual accounts will be charged \$300 a year, and those on the monthly payment option will be charged \$30 per month.

Twilio Charges

Just as Twilio charges per text message, they will also charge per call minute. The charges vary based on your internal Twilio setup, call volume, calls in, calls out, and conference calls.

The average estimate is \$0.005 per minute. This rate is often exponentially cheaper than your current landline phone bill.

Though our own base office included multiple extra features, so the billing was high, our phone bill has been cut by about 70%. We've included a breakout of Twilio billing for the 2021 year with a few things to note: We have combined billing for three major companies (our Tax Office(s), ATOM, and our Insurance Company) and we did not fully roll out VoIP till mid-year for all three companies. Your own office's call volume would typically not be as high as what you may find here:

[Our Billing Breakout for 2022](#)

[Doc Link](#)

Voicemail

Voicemail is also available and conveniently linked to the Client Files! This function can be activated or left "off" based on your office needs!

Many companies have removed this option, given current client expectations for immediate communication (which text provides). You may find that receiving an ATOM message attached to their client file on your ATOM Homepage is much more efficient. Those who do not utilize it have not seen the lack of voicemail to be a detriment to their customer service options.

With ATOM VoIP, you can set a recorded greeting when calls cannot be answered with instructions for how to reach you. Or leave instructions for them to leave a voicemail. These messages can be customized at any time in your ATOM Admin table for Holiday weekends or unexpected closings.

Faxing

We have integrated a new option with Interfax by Upland for Faxing directly through your ATOM Software Account Documents! Please see the ?Help Menu link for "Faxing through ATOM with InterFax"

Can you Keep Your Current Number?

Yes, you can **Port** your current number to Twilio for your phone line. ATOM Support will discuss this option when you contact our office to inquire about Twilio VoIP in ATOM. Twilio VoIP will funnel all your calls to ONE office number. Calls can be transferred, conferenced between employees and/or clients, or dialed internally as an intercom.

What Kind of Equipment Will You Need?

The ATOM VoIP system is built to be used directly in your current site. Any "speaker/microphone" combination that can be accessed in the device you use to open ATOM will work. You can typically find very "affordable" options on Amazon, or in a box store, that works with a computer. Wired or wireless Headsets, stand-alone microphones, and speakers, or conference devices can all be utilized.

Integrated Wireless Jabra PRO 9450 Mono Noise Canceling Wireless Headset Integration: We have integrated the programming to work with this wireless model. The base or headset can be configured to "ring" when a call comes in, and calls can be answered by headset or base. This model can be found on many shopping websites.

Mobile Device NOTE: Using a mobile device is best used for the call-out function so that you can make a call from the system without your personal cell phone showing in their caller ID, and so that the call is properly logged in your database. Mobile device use is for occasional use only and is not suggested for the typical workday.

Apple Device NOTE: The phone agent page that enables VoIP requires two simultaneously active web pages. At this time, iPhone users will not be able to properly use the Twilio phone agent as background webpages are not active. **Currently, only Android/Samsung users have been able to successfully use VoIP on mobile devices.** *Apple has been updating the “Split Screen” function for higher-level models, so this could change quickly.

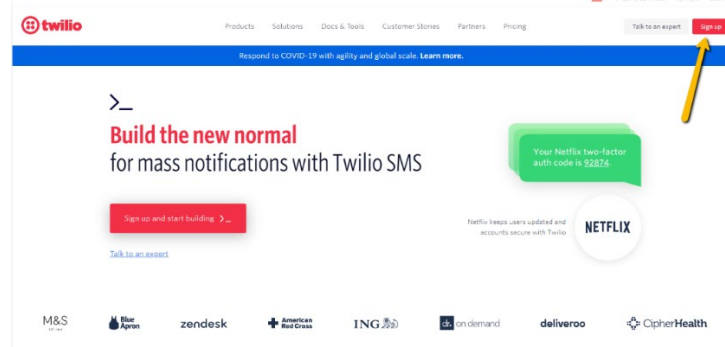
Signing up for Twilio VoIP

Many offices have specific questions about adding VoIP to your office; we encourage you to contact our office to discuss your needs and options!

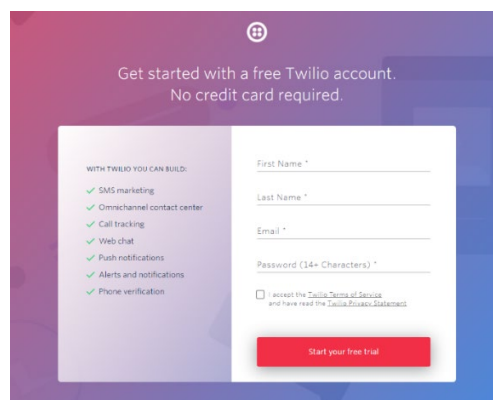
As discussed in the first section, if you do not already have a Twilio Account for ATOM Texting, we encourage you to consider it as it greatly enhances your client communication and is easy to use. If you already have a Twilio Account already, you can contact our office to begin your setup for ATOM VoIP.

If you are completely new to Twilio, you will need a Twilio Account and number:

Step 1: Go to www.twilio.com. You will want to click the “Sign up” button in the top-right corner of your screen.

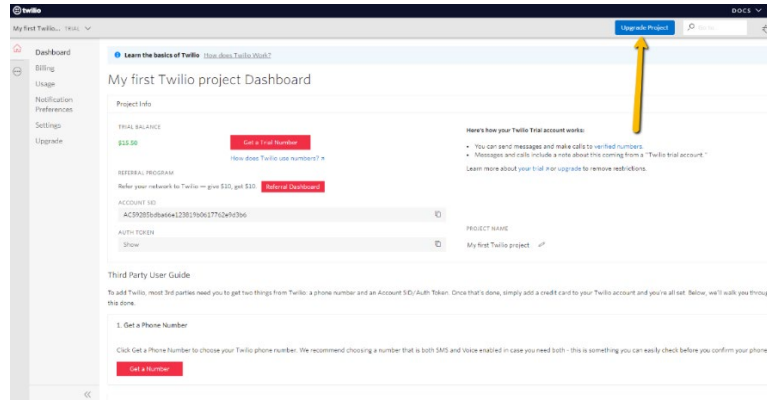


Step 2: Complete the sign-up process – Twilio will want you to sign up for the free trial. This is fine to start but, as you will need to upgrade to the paid version for it to work with ATOM, it saves time to skip this option.

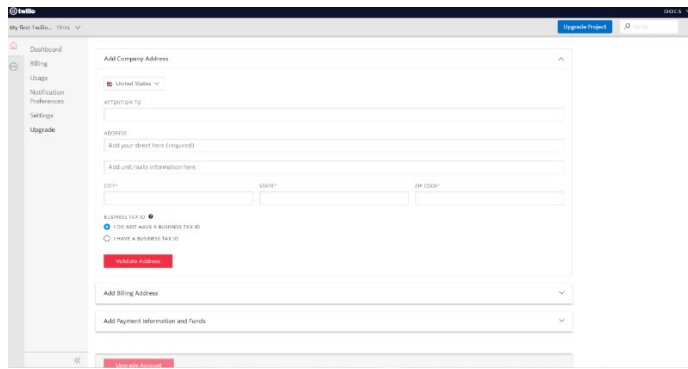


Step 3: You will be asked if you write code. Click “No” Then you will be asked what you want to do/ Select “Get a Twilio number to use with a different service”.

Step 4: You should now be at your Dashboard. Click “Upgrade Project” in the top-right corner.



Step 5: After clicking Upgrade Project, you will need to fill out the Upgrade page with your business address, payment info, and billing address.



Step 6: From here you will purchase your Twilio Number. You can search for numbers based on location and/or containing certain digits (like trying to match the first part of your office number). Make sure the number you purchase is set to accept Calls, TXT (SMS), and Pictures (MMS) options.

NOTE: There is a way to have Twilio HOST or PORT your office number. We have another set of instructions that cover that. You will want to call our Support Staff to discuss.

Step 8: Once you have your account setup you will want to contact our office to begin the process to complete your setup. We will require a message (text, email, or portal) with the following:

Your Twilio Email Login:

Your Twilio Password:

We will then contact you to setup an appointed time where we will log in to your Twilio account to configure the VoIP settings in your Twilio Account which will require us to receive your Twilio 2FA code. The configuration process takes about 30 minutes and once we are done, we will be able to send your credentials to our Programmer to finalize the internal ATOM programming.

We will also, contact you to setup a GoToMeeting session for VoIP Training for the main ATOM point person in your office.

Once this is all done, all you must do is wait for us to let you know when our programmer has completed your Twilio Request task. Once we do that, your Twilio setup process for your ATOM software will be complete!

Always remember that you can reach out to use for any questions or assistance!

Call or Text: 517-940-8745 | **Email:** ATOM_Software@parse.atomanager.com |

Email for Attachments: sales@atomanager.com