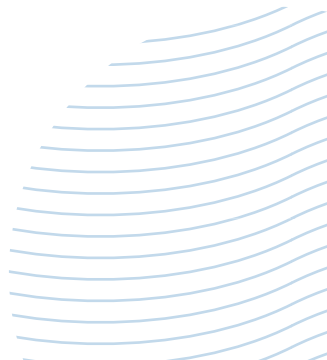




Atlas Email Integration

Technical FAQ and Setup



Summary

Convex is now offering the ability for users to email contacts through Atlas. This is accomplished by connecting to the user's email account and providing Atlas with the permissions to send and receive emails. Convex has contracted with Nylas, an industry leader in communication platform integrations, to assist us in providing this email service.

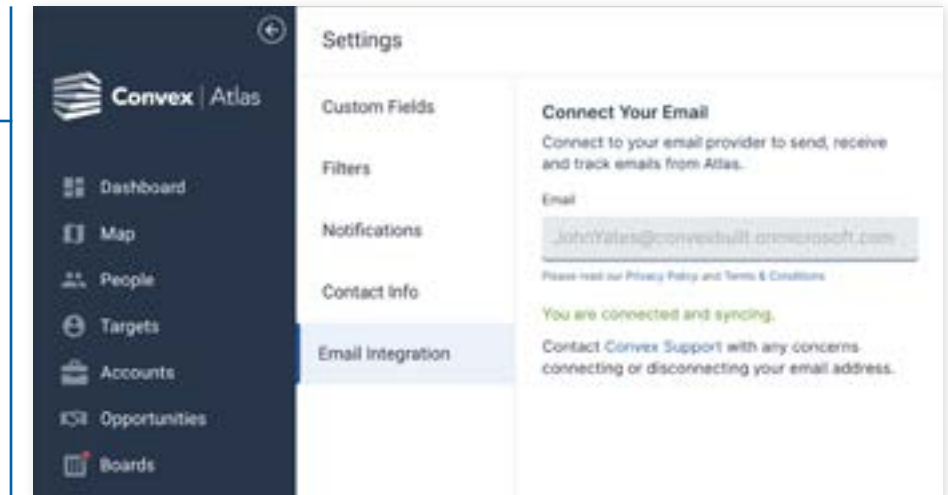
This document is designed to answer some of the common technical questions Convex has received from IT departments and security teams.

What is the setup process to utilize Microsoft email in Atlas?

Users will have to authenticate their email address to Atlas as a first step.

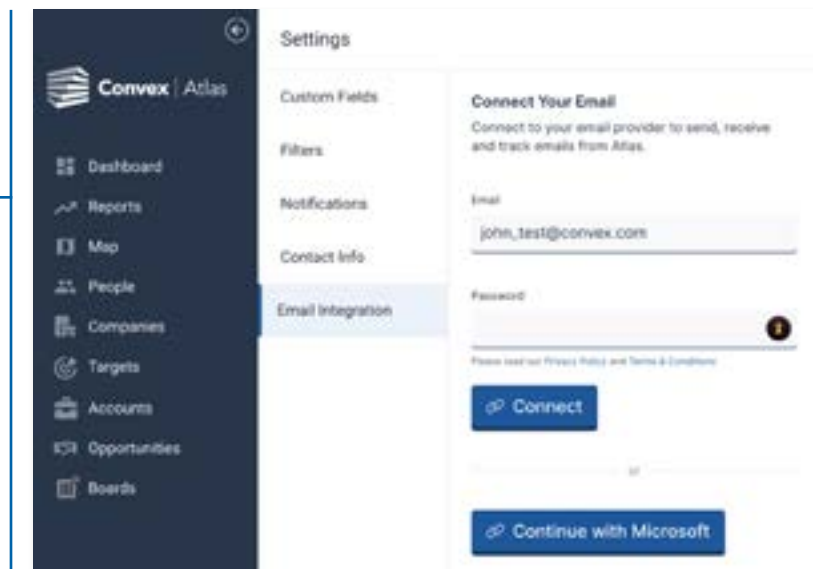
Go to Settings in Atlas to manage authentication. **Settings > Email Integration**

Users will be prompted to enter their email login credentials (email address). Atlas uses the email address to attempt to determine the type of provider, and request more information from the user as needed.



This is the view of the email integration settings AFTER an account has been authenticated.

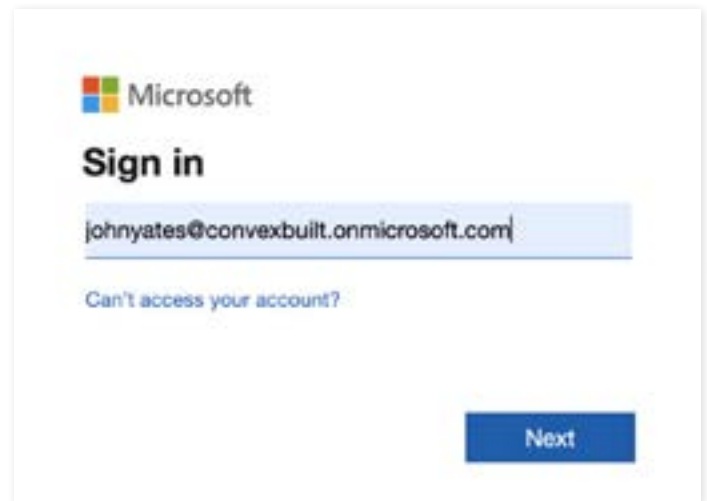
In some cases, Atlas can't detect all the information we need in order to request access to the account. The user would be prompted to select a specific provider.



This is the view of the email integration settings if the user's email provider can't be identified.

Users will be prompted to log in to their Microsoft account. This is the final step to grant permission to Atlas to:

- Send emails
- Fetch and display new emails
- Update emails (mark an email as read).



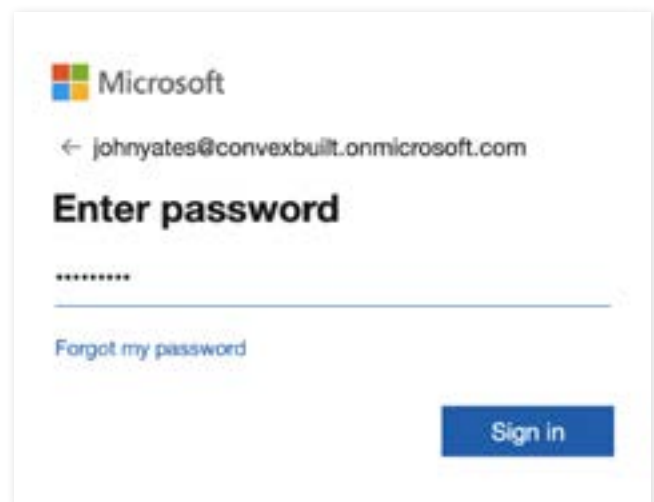
Microsoft

Sign in

johnnyates@convexbuilt.onmicrosoft.com

Can't access your account?

Next



Microsoft

← johnnyates@convexbuilt.onmicrosoft.com

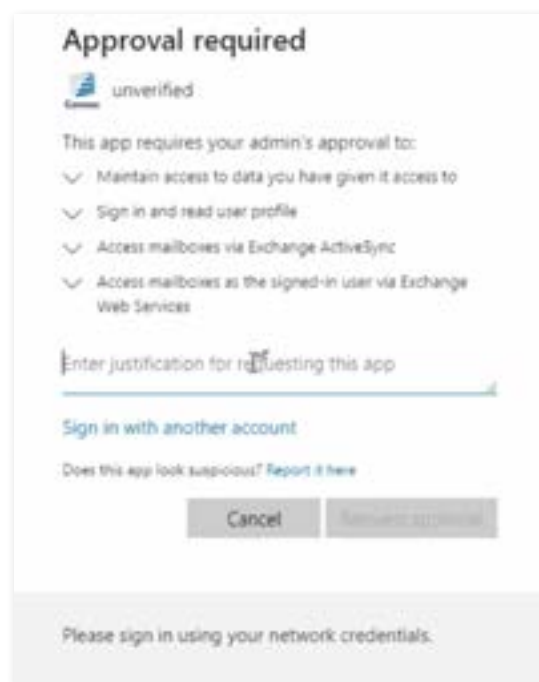
Enter password

Forgot my password

Sign In

Example views of what a user would see from Microsoft prompting them to login

For some Microsoft configurations, the IT team must grant permission for Atlas to have access, and that request will be sent automatically.



Approval required

unverified

This app requires your admin's approval to:

- ✓ Maintain access to data you have given it access to
- ✓ Sign in and read user profile
- ✓ Access mailboxes via Exchange ActiveSync
- ✓ Access mailboxes as the signed-in user via Exchange Web Services

Enter justification for requesting this app

Sign in with another account

Does this app look suspicious? Report it here

Cancel Request approval

Please sign in using your network credentials.

Why is Atlas requesting that an IT department approves connection to my email?

This feature allows users to view and send emails from your account within Atlas. In order to do that, Atlas needs access to some permissions on your email account, like the ability to send, fetch, or update emails. Atlas also needs some basic primary information about the user (such as the email address). Depending on the setup for your company's Microsoft service, IT will need to grant permission so that users can connect to Atlas.

What happens when a user enters their email address?

Atlas will collect the email address and send it to partner Nylas to identify the provider for that email address. If Nylas successfully detects the provider, the user is routed to the appropriate login flow:

- OAuth for Gmail and Microsoft emails
No login information is stored in Atlas. The authentication token received from the email provider is then forwarded to Nylas to make sure the connection is successfully created.
- Basic auth for On-premise, IMAP and other scenarios.
Passwords are not stored in Atlas. This information is forwarded to Nylas where a 2-way connection is created with the email provider.

These login flows are maintained by the providers themselves (typically a Microsoft or Google URL). Users are shown the set of permissions that Atlas is requesting to provide the email integration features.

What access does Atlas have to the email?

Atlas is only requesting access to reading and receiving emails. No access to drafts is needed at the moment. Atlas never access the customer's email directly, but rather through a secure connection with our partner Nylas.

Atlas only requests the last 90 days worth of emails (though Atlas can accommodate other requests if needed). Atlas only listens to inbound and outbound emails while the account is actively connected. The user can choose at any time to disconnect their email from Atlas.

What happens if a user is removed from Atlas or disconnects their email?

The email integration feature displays ALL emails between users in the organization and specific contacts. If an email address is disconnected, Atlas maintains the email metadata but will no longer display the email body. The manual disconnect flow does not remove all email metadata from Atlas. Convex can permanently delete all email metadata by request.

What permissions is the user granting to Atlas?

Permissions to read and send emails on behalf of the user, as well as permissions to update emails that have been read.



What is being stored on the Atlas side?

Atlas does not store email bodies, but email metadata is stored (timestamps, subject lines, recipient lists (to:, from:, cc:, bcc:)) and a reference to the email record stored in Nylas.

What security is in place around this feature?

Atlas uses Nylas' secure platform to keep email contents safe and ensure security in transit. Convex chose Nylas in part due to the high level of security and certification on their platform. Please refer to this security white paper from Atlas for more information: [Click Here](#)

There is no PII surfaced in Atlas logs, but Atlas does store email contacts in plain text which allows synchronizing emails that are related to an Atlas contact.

What happens if a user sends an email from Atlas?

Information gets directly sent to Nylas, which then gets communicated to the corresponding email provider. An activity record containing the email's metadata (i.e. timestamps, email subjects, to:, from:, cc:, bcc:) is created in Atlas.

Need to contact our team?

Email us at support@convex.com or reach out directly to your customer support representative.

About us

Convex is on a mission to serve as the most important partner to commercial services businesses. Convex provides a secure platform designed specially for the commercial services industry that leverages a powerful combination of property-based intelligence and easy-to-use applications, empowering revenue teams to win their market.