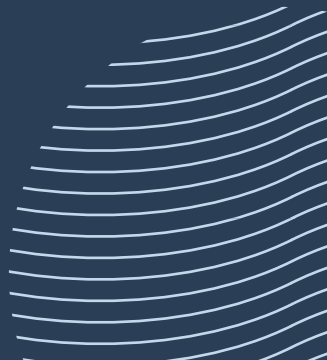# Atlas Dialer

Technical FAQ and Setup

# Summary

Atlas is providing a feature that allows users to make phone calls from the browser, known as "web calls" or "soft calls."  Convex partnered with Twilio, a world-wide leader in customer interaction tools, to provide this service.  The user also has the option of importing their phone number for Caller ID, allowing the calls to appear to come from their own number.

## How does Atlas make phone calls?

Atlas uses a provider (Twilio) to facilitate phone calls from the browser. Once a user selects to call from Atlas:

- A request is placed to Twilio with the "TO" and "FROM" phone numbers.
    - "FROM" can either be a set default Atlas numbers or the user's number if they have completed the Caller ID import flow
- Twilio dials the number and responds to Atlas with the call details and connection information
- Atlas will display the connection information as it is updated (Dialing / Connecting / Connected / etc)
- At the conclusion of a call, Atlas passes the call ID to our database and displays metadata on the call (example - call duration)

## What is the process for setting up Atlas Dialer?

In most cases, users can make phone calls without the need to complete any setup.  However, this is not recommended for a couple of reasons.

1.  Atlas uses a set of generic numbers that are unmonitored and unregistered, often leading to calls that can be marked as spam.  Since these calls are unmonitored, there is no way to answer a received call or call back.
2.  Some organizations will need to permit Atlas to make phone calls by allowing permission in a company firewall.  See the section below "What firewall permissions do I need to allow?"

Convex recommends the user import their phone number for Caller ID.

# What does importing a number for Caller ID mean?

The user is giving permission to our 3rd party provider Twilio to make phone calls where their phone number will show up as the "FROM" number.  This does not allow other users to make phone calls form this number since only one user can register a single phone number.

## What is the process for importing a number to be used as Caller ID?

Users must go through a validation process with their phone number. This ensures the number belongs to the user making the request.

- Users will enter the phone number they wish to use.
- Atlas will send a request to Twilio to validate the number and make sure it is not currently in use.
- Twilio will start the validation process.
- A phone call is made to the number.
- A validation code is given to the user on the phone (automated).
- The user will enter that validation code in Atlas to validate their number.
- Once completed, Twilio makes a call to Atlas to confirm the validation and logs the number as a verified Caller ID.
- Atlas retains this validated number for the user's settings.

## What options are there for setup?

Users can select input and output options on their device to make phone calls.  Similar to web conferencing, this allows the user to select their preference for microphone or speakers.

## Why is my browser asking for microphone permissions?

In order to be able to capture audio from the user's microphone (in order to make a phone call), modern browsers require explicit approval from the user to access the audio feed. This is not an Atlas only feature, but rather something all web applications that use a microphone need to do in order to function.



## Where would I set permissions for microphones?

In Chrome, the user would need to go to **Settings > Privacy and Security > Microphone.**

From there, the Default Browser setting must be set to "Sites can ask to use your microphone".

The user will also want to verify that Atlas has been given permission by appearing in the list of sites allowed to use your microphone.
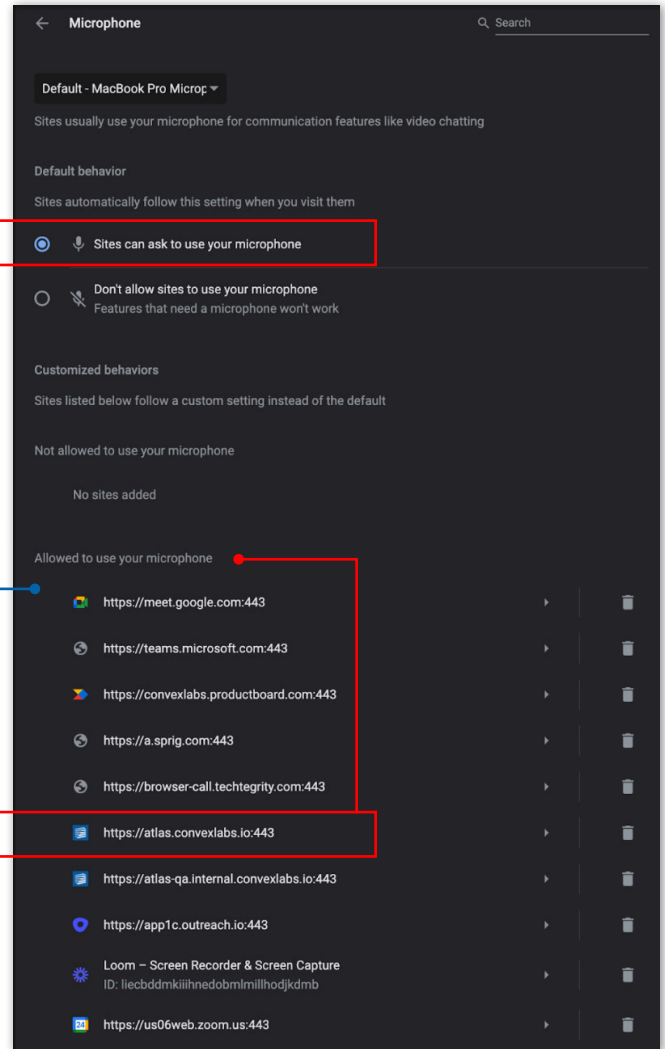
## What firewall permissions would I need to allow?

Company firewalls can at times restrict web-based calls. If that is the case, the following settings are recommended:

| | Your Intranet | | Allowed Destinations | | |
|---|---|---|---|---|---|
| Secure Media (ICE/STUN/SRTP) Edge Locations | Protocol | Source IP | Source Port † | Destination IP Ranges | Destination Port Range |
| ashburn (us1) | UDP | ANY | ANY | 54.172.60.0 - 54.172.61.255 and 34.203.250.0 - 34.203.251.255 | 10,000 - 20,000 |
| umatilla (us2) | UDP | ANY | ANY | 54.244.51.0 - 54.244.51.255 (54.244.51.0/24) | 1,024 - 65,535 |

**Atlas Dialer** Technical FAQ & Setup

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

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