

Atlas Engage Dialer



Overview

Convex offers an engagement feature that allows users to make phone calls directly out of Atlas. In one click, users can connect with property decision makers and automatically track their call activities. This gives users a quick and seamless way to reach prospects without having to leave Atlas.

When using this feature, we recommend importing your phone number for Caller ID purposes. This guide explains how to get started.



Getting Started

When you find your contact and save it, click the call button and complete the next steps. Please note these instructions were developed for a Google Chrome browser. Setup on other browsers may look slightly different.

1 Click the call button of your target contact

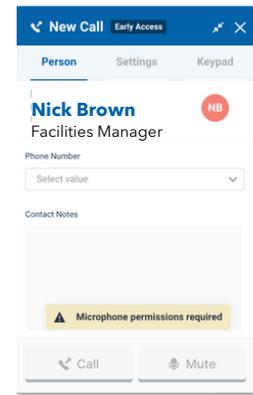
- You'll need to give Atlas permission to connect to your microphone



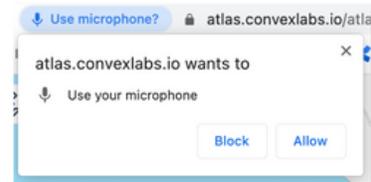
Call buttons located throughout Atlas

2 Enable microphone permissions

- The dialer will notify you about giving Atlas permission to use your microphone
- Your browser will request permission to use your microphone
- Click allow



Dialer permission notification



Browser requests microphone permission (Google Chrome)

Set Up Caller ID on the next page

Contact your support representative or email support@convex.com

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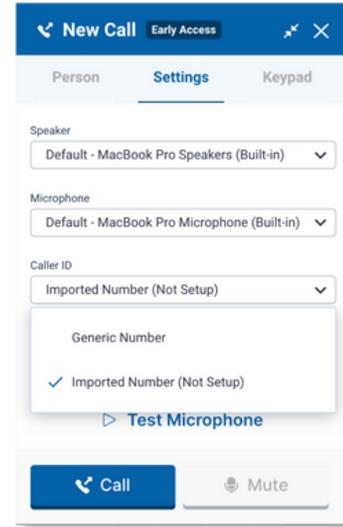


Set Up Caller ID

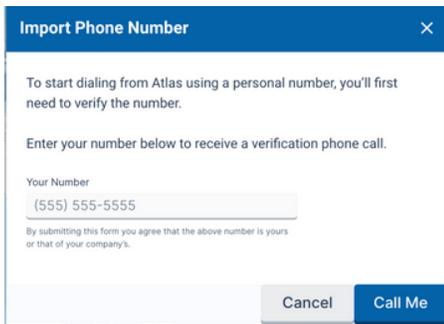
This feature allows you to make calls from a recognizable number, which gives contacts a number to call back and increases the likelihood of connecting with a contact.

1 Select "Settings" in the Dialer Box

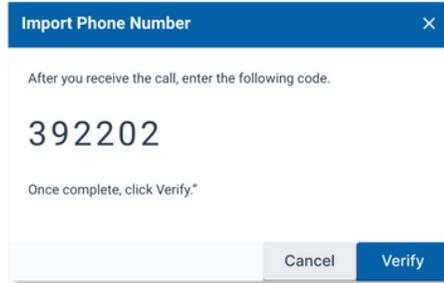
2 Select Imported Number, in the "Caller ID" dropdown menu



Dialer Box



Insert your phone number in this box

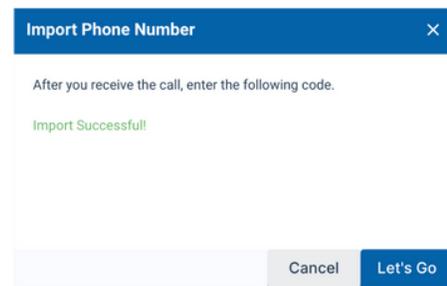


Verification code to confirm your phone number

4 Confirm your phone number has been imported

3 Insert the phone number, you'd like to use for Caller ID and press "Call Me"

- A verification code will appear
- You'll receive a phone call and be asked to enter your verification code



Phone number successfully imported

Having Trouble?

Contact your support representative or email support@convex.com

[Click Here](#) to access our Engage Dialer Technical FAQ and Setup Guide