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

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





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 Bo	x	
2	Select Imported Number, in the "Caller ID" dropdown menu		
	Import Phone Number ×		
	To start dialing from Atlas using a personal number, you'll first need to verify the number.		
	Enter your number below to receive a verification phone call.		
	Your Number (555) 555-5555		Insert
	By submitting this form you agree that the above number is yours or that of your company's.		vou'd
	Cancel Call Me		and n
	Insert your phone number in this box		
	Import Phone Number ×		• A
	After you receive the call, enter the following code.		• Y
	392202		b
	Once complete, click Verify."		Ve
	Cancel Verify		
	Verification code to confirm your phone number		Impo
			After
Δ	Confirm your phone number		Impor
-	has been imported		

Person	Settings	Keypad
aker		
Default - Mac	Book Pro Spea	kers (Built-in)
crophone		
Default - Mac	Book Pro Micro	ophone (Built-in)
ler ID Imported Nur	mber (Not Setu	p) -
Generic I	Number	
 Imported 	d Number (Not s	Setup)
D	Test Micro	phone

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

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Having Trouble?

Contact your support representative or email support@convex.com

<u>Click Here</u> to access our Engage Dialer Technical FAQ and Setup Guide