

Atlas Engage Email



Overview

Convex has developed a new engagement feature that allows users to authenticate their Microsoft email account to Atlas, giving them the ability to send, reply, or view a list of all email communications with saved Atlas contacts.

Managing email directly from Atlas enables organizations to more efficiently engage their prospects and work through their targets at scale.

- Atlas provides a "read receipt" letting you know if your email was opened.
- Users can see communication history, which enhances your communications.



Setup Instructions

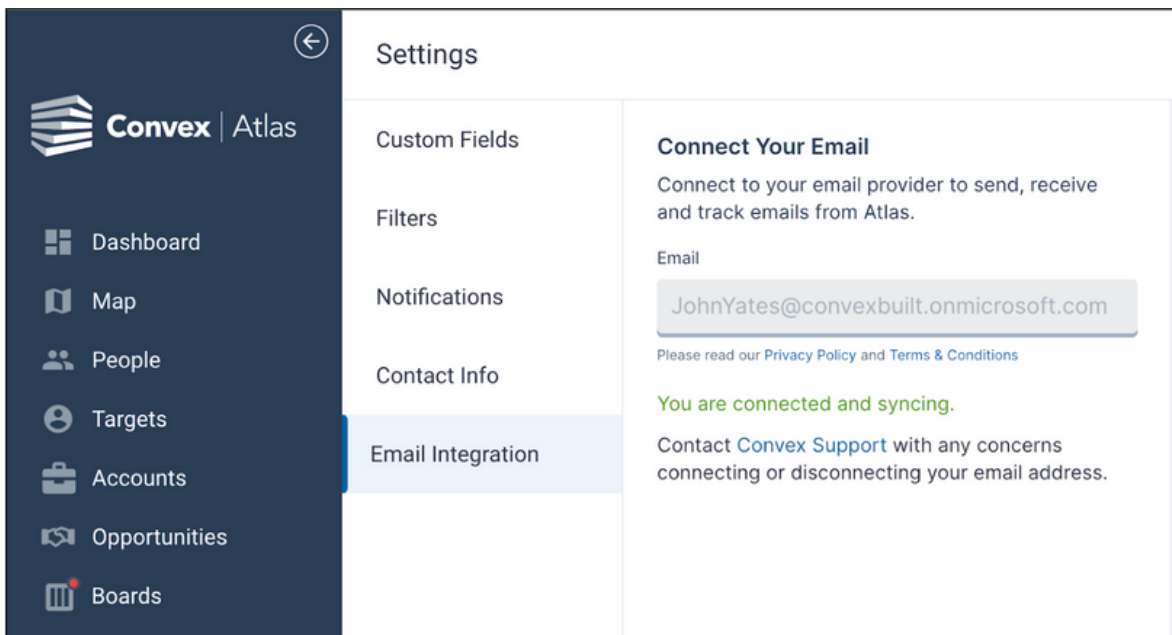
- 1** Authenticate your email address to Atlas.
In Atlas, go to Settings, then Email Integration.
- 2** Enter your email username and password.
Then follow the steps as prompted, in Atlas.
- 3** Confirm you're connected! You'll see the following screen:

Supported Email Providers

We support Microsoft based Email. This includes:

- Microsoft Exchange Server 2003+
- Microsoft Exchange Online
- Microsoft Office 365

If you have a Google-based email account, please contact your support representative.



Having Trouble?

See common issues on the next page

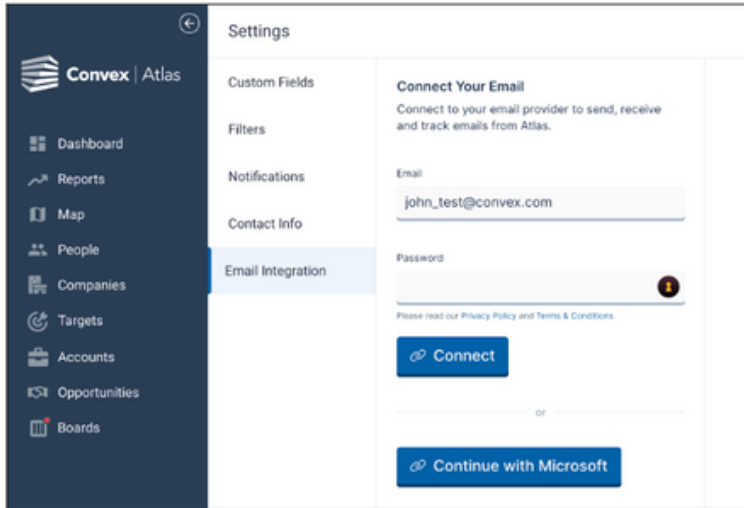
Contact your support representative or
email support@convex.com

Common Issues

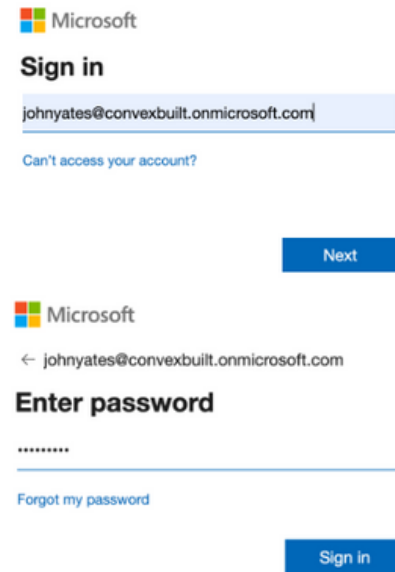


1 Atlas cannot detect your email

In this case, you'll see the screen below and you need to select a specific email provider.



Click "Continue with Microsoft" & follow the prompts to log in to your Microsoft account. Example below:



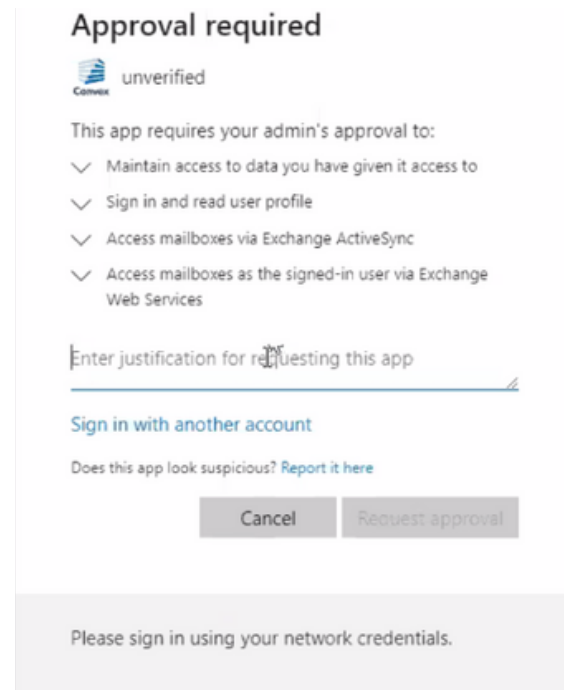
2 You need IT approval

In this case, you'll see a screen similar to this

We recommend sharing this statement with your IT administrator:

Atlas is essential to my job activities so that I can access key customer and prospect sales intelligence, conduct research and sales outreach, and input key sales information for my organization. Atlas is a Soc2 data protections certified platform and our company has a legal agreement protecting any data shared with it. By connecting my email to Atlas, I will be able to perform better in my role.

Afterward, reach out and ask IT to check their email. It can also help, if a senior member of your team escalates this request internally.



Still Having Trouble?

Contact your support representative or email support@convex.com

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