



Quick Starter Guide

Tray Menu Mode

Introduction

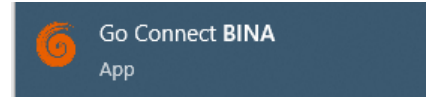
This quick starter guide contains useful information to help you get started with Go Connect Bina.

Licensing

Go Connect Bina must be licensed before it can be used. User licenses are either assigned in advance by your provider or registered by the user at first login using a provider supplied License Key code.

Shortcut

After installation Go Connect Bina is available from the start menu:

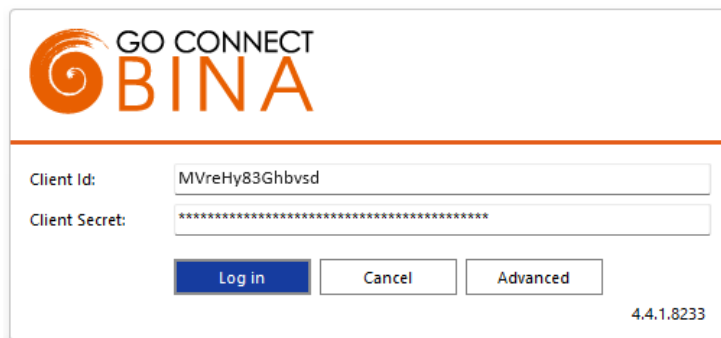


Compatible Telephony Platforms

Intermedia Ascend UCaaS
Intermedia Elevate
NEC Univerge Blue

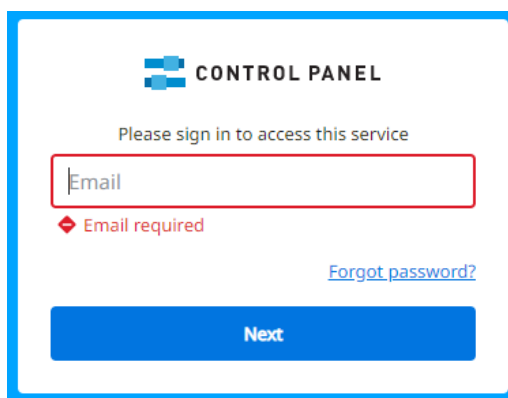
Client ID and Login

On first start Go Connect Bina will authenticate with the telephony platform using the 3rd Party Client ID and Client Secret. The Client ID and Client Secret should be supplied by your service provider and entered into Go Connect Bina on first startup:

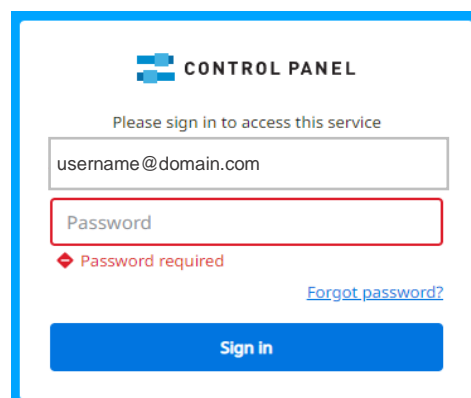


The screenshot shows the Go Connect BINA login interface. At the top is the logo. Below it are two input fields: 'Client Id:' with the value 'MVreHy83Ghbvsd' and 'Client Secret:' with a masked password. There are three buttons: 'Log in' (blue), 'Cancel', and 'Advanced'. The version number '4.4.1.8233' is displayed in the bottom right corner.

You will then be asked to enter your telephony platform user credentials:



The screenshot shows a 'CONTROL PANEL' sign-in screen. It asks the user to 'Please sign in to access this service'. There is an 'Email' input field with a red border and a red error message 'Email required'. A 'Forgot password?' link is present. A blue 'Next' button is at the bottom.



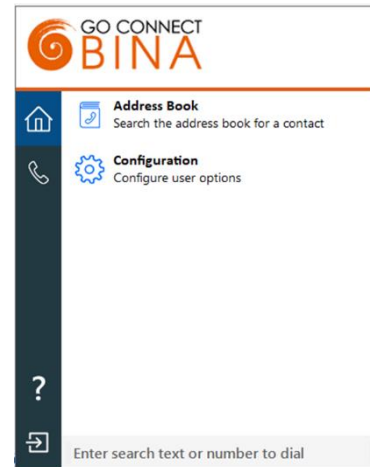
The screenshot shows a 'CONTROL PANEL' sign-in screen. It asks the user to 'Please sign in to access this service'. There is a 'username@domain.com' input field and a 'Password' input field with a red border and a red error message 'Password required'. A 'Forgot password?' link is present. A blue 'Sign in' button is at the bottom.

Interfaces

Go Connect Bina has two main user interfaces: Tray Menu and Preview Window.

Tray Menu

Go Connect Bina runs in the system tray. The Tray Menu is accessed by right-clicking on the Go Connect Bina client circle icon, which is normally green in colour. The colour will change according to your telephone state.



Preview Window

The Preview Window is displayed whenever an inbound or outbound call is active and automatically hides after the call has connected (the hide delay time of the Preview Window can be altered in Configuration). It can be re-displayed during the call by hovering over the Bina system tray icon.

The Preview Window has been specifically designed to be as unobtrusive as possible, without taking up a large proportion of your screen or obscuring other applications.

The window displays the caller or called party details, obtained from any integrated business (CRM) application.

CALLER DETAILS are retrieved from your CRM address books. Regional location can also be displayed.

NOTES are also retrieved from the caller's contact record, if available.

ADD CONTACT records to your CRM address books or copy data from one CRM to another.

POP CONTACT in the CRM application for further details

CREATE CALL LOG into the CRM contact record to show conversation history. Can also be automated.

CALL CONTROL

SEND CALLBACK EMAIL with caller details included

DISPLAY ADDITIONAL information from other CRM data

Call Controls

The following call controls are available through the Preview Window:

| | |
|----------------------------|-----|
| Hang up | YES |
| Answer / Deflect / Divert | NO |
| Hold / Transfer / Pickup | NO |
| Show / Pop contact | YES |
| Add contact* | YES |
| Create and show Call Task* | YES |
| Show Related Data* | YES |
| Send Callback Email | YES |

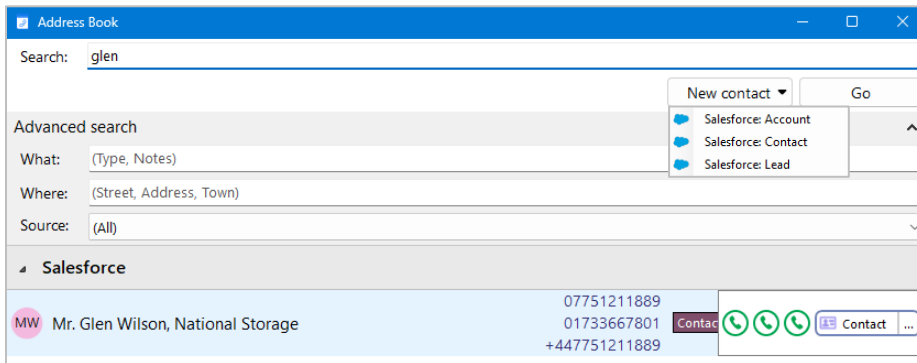
*Only if an integrated CRM supports the feature

Preview Window Stacking

If there is more than one active call, the Preview Windows for those calls are automatically stacked to reduce the overall size of the display. Clicking on the header of any window will bring it to the front.

Address Book

The Go Connect Bina Address Book can search the internal user list plus any integrated CRM application.



To dial the required contact, simply click on the telephone number displayed to initiate the call or use the **Call** button from the slide out menu:



Alternatively, contact details can be opened via the slide out menu when hovering over the contact. Click the CRM icon or the icon to view the available actions for the integrated application (example shown for Salesforce).

For any compatible CRM configured, the New Contact selection will also allow creation of new contacts directly into the CRM address book.

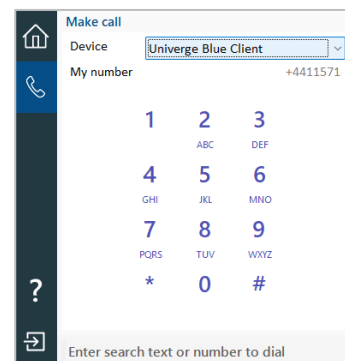
Dialing Options

Go Connect Bina offers a wide range of click-to-dial features to accelerate the outbound calling process, both in locating the number to dial, and in the actual dialing process itself. The most common tools are explained below:

Make Call

The Make Call Dialpad provides a familiar interface to quickly make telephone calls. It also provides a method of setting your Preferred Device, where multiple devices are available, allowing you to choose which device to use to make outgoing calls

The Device labels can be edited as required in Device Configuration.



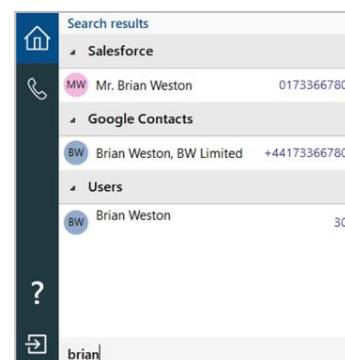
Quick Dial

One of the most powerful features is the combined search and dial entry field at the bottom of the Tray Menu following a right-click of the system tray icon.

To make a call, simply type the number to dial and hit Enter.

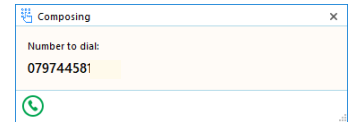
Alternatively, type a contact name (either full or partial) to initiate a search of the internal user list and any integrated CRM business applications.

The search results are displayed within the Tray menu window, simply click the number to dial or open the contact using the slide-out menu.



Clipboard Dialing

Any telephone number copied into the Windows clipboard can be dialed via an automatic pop window, offering the option to dial the number. Just click the Call icon to dial.



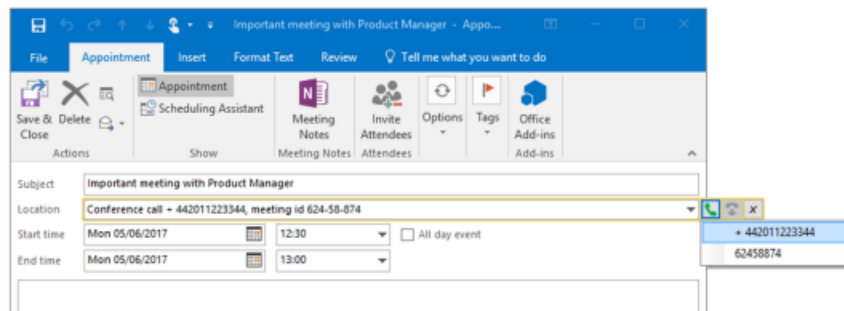
Screen Read

With "Screen Read" dialing, you can click-to-dial any number on screen, even when presented as an image. Just hover the cursor over the number displayed and hold 'ctrl' and 'shift' simultaneously to turn the number into a quick dial link:



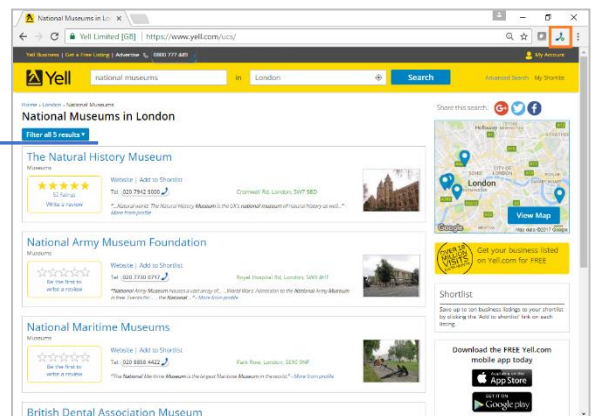
Focus Dialing

With Focus dialing enabled, Bina will automatically detect fields that contain dial-able numbers and presents a click-to-dial icon to the right of the field. If the field contains more than one potential telephone number, a drop-down is displayed when you hover over the icon, allowing you to select which number to dial.



Web Page Dialing

Bina can recognize telephone numbers in web pages and convert them to a quick dial hyperlink. Simply click-to-dial directly from the web page.



CRM Integration

Go Connect Bina provides integration to a wide range of different CRM and Contact orientated Business Applications. Integration provides a range of set integration features from the list below. Up to 4 integrations can be concurrently configured.

Caller Preview

Displays the caller's name in the Call Preview window when a match is found between the caller's number and the contact information stored in an integrated application.

Contact Popping

Instantly open the caller's contact record in the integrated application by clicking the application's icon in the Caller Preview window.

Adding a contact

Instantly add and edit a new contact record in the integrated application by clicking the add contact icon in the Caller Preview window.

Contact Searching

Enables you to concurrently search all configured integrations and pop the contact record or click to-dial from the results.

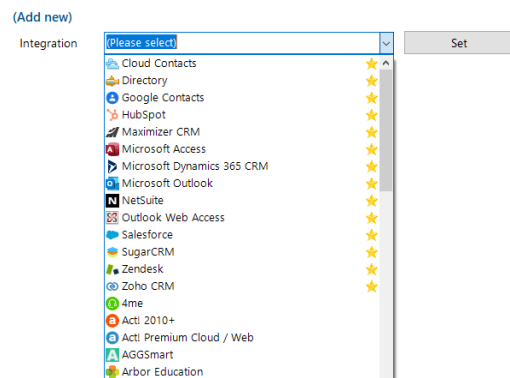
Activity Logging

Manually or Automatically create a history (Activity) log of a call received within the Business (CRM) Application/s and add notes.

Related Data

Quickly locate and present additional information related to the contact, including tickets/cases, call activity records, email and additional contact details. Data from multiple CRMs are combined in an additional window accessed from the Preview Window or contact search

To set up an integration just select the "(Add new)" from the Configuration page, select an Application and click "Set". To get step-by-step guidance on setting up the integration just click on the HELP button.



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