



GO CONNECT
BINA

Quick Starter Guide

Tray Menu Mode

Introduction

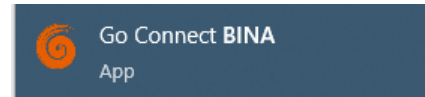
Welcome, this quick starter guide contains useful information to help you get started with Go Connect Bina.

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

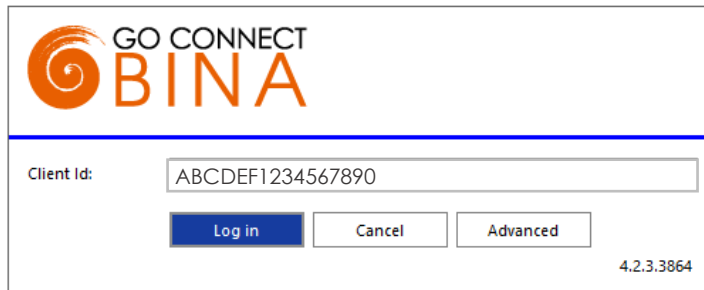
After installation Go Connect Bina is available from the start menu:



Client ID and Login

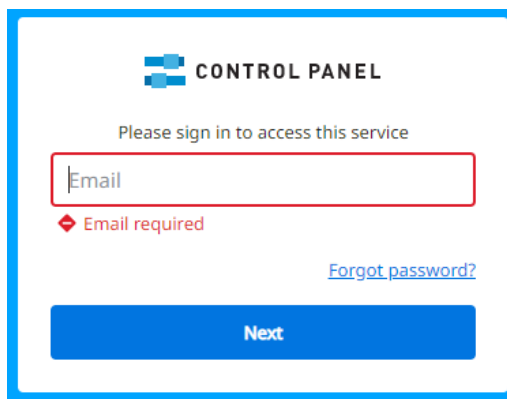
On first start Go Connect Bina will authenticate with the Univerge Blue platform using the 3rd Party Client ID.

The Client ID should be supplied by your service provider and entered into Go Connect Bina on first startup:

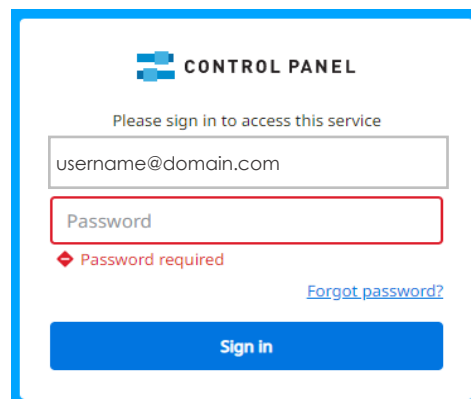


The screenshot shows the Go Connect Bina application window. At the top is the logo. Below it, there is a text label 'Client Id:' followed by a text input field containing 'ABCDEF1234567890'. Below the input field are three buttons: 'Log in' (highlighted in blue), 'Cancel', and 'Advanced'. In the bottom right corner, the version number '4.2.3.3864' is displayed.

You will then be asked to enter your Univerge Blue user credentials:



The screenshot shows the 'CONTROL PANEL' login screen. It says 'Please sign in to access this service'. There is an input field for 'Email' with a red border and a red error message 'Email required' below it. A blue link 'Forgot password?' is visible. At the bottom is a blue 'Next' button.



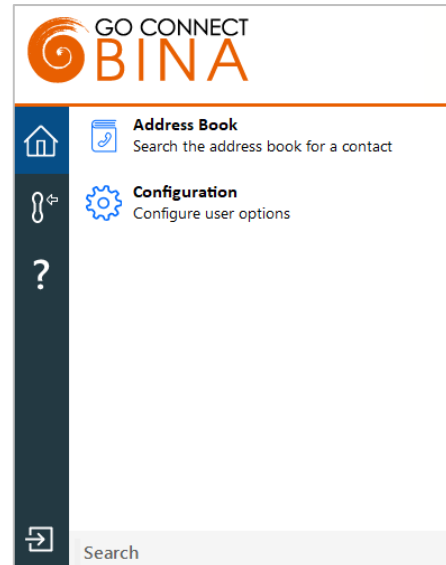
The screenshot shows the 'CONTROL PANEL' login screen. It says 'Please sign in to access this service'. There is an input field for 'username@domain.com' and another for 'Password' with a red border and a red error message 'Password required' below it. A blue link 'Forgot password?' is visible. At the bottom is a blue 'Sign in' button.

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.



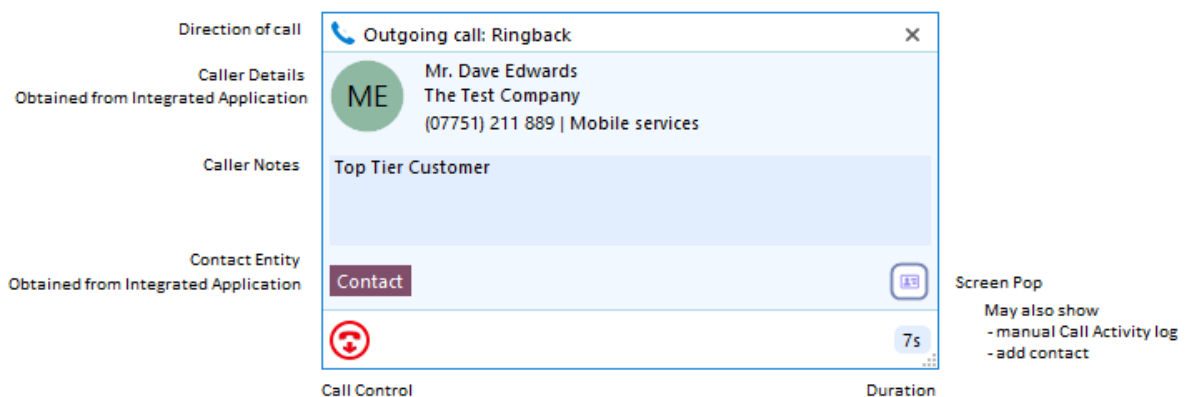
Preview Window

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 at any time 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.



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

*Only if an integrated CRM supports the feature

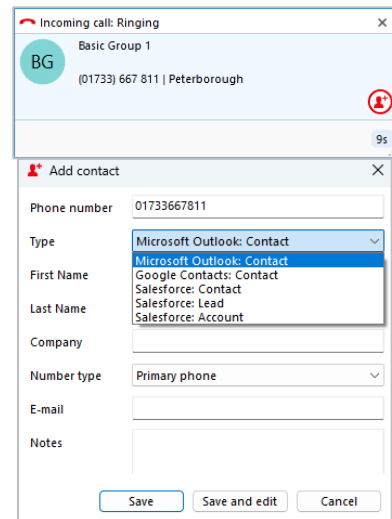
Preview Window Stacking

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.

Add Contact

When a telephone number is presented in the Preview Window, Call History or Recent Calls list and a contact cannot be found, the Add Contact icon is presented:

Click the icon to add contact information and then save to the desired directory or integrated CRM business application. The Add Contact feature can also be used to copy the contact to other locations.



Preferred Device

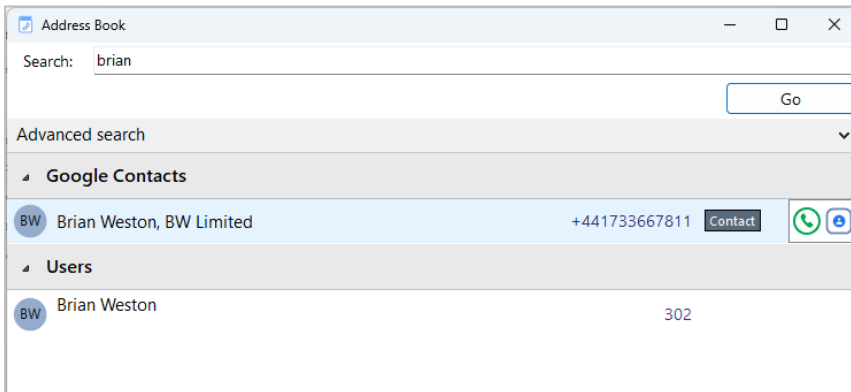
Where multiple devices are available, the Preferred Device drop down list will allow you to choose which device to use to make outgoing calls.

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



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, the contact details can be opened via the slide out menu when hovering over the contact name. Just click the CRM icon to open the contact within the integrated application (example shown for Google Contacts).

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:

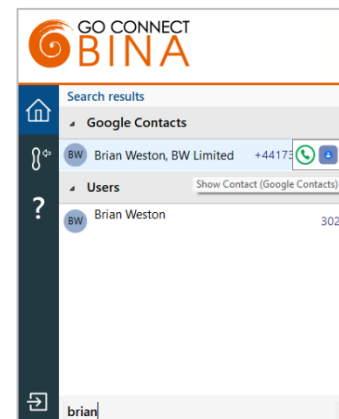
Quick Dial

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.

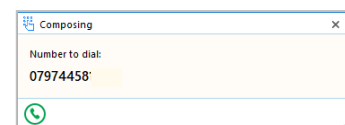
The search results are displayed directly within the Tray menu window – simply click the number to dial, or open the contact using the slide out menu.



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.



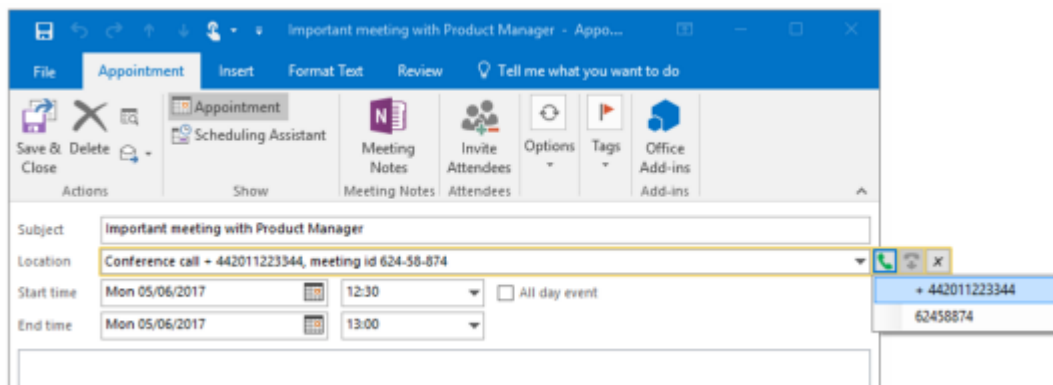
Screen Read

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:



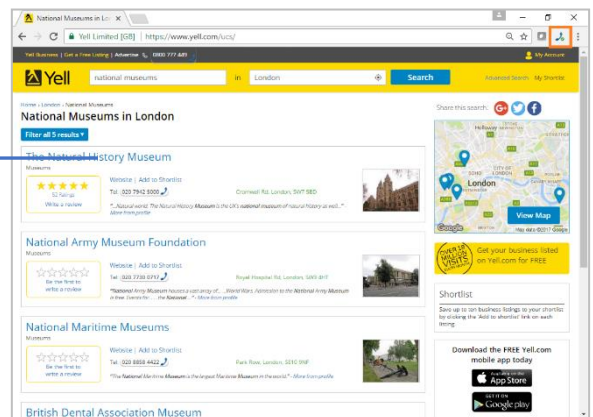
Focus Dialing

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 four Add-ins 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.

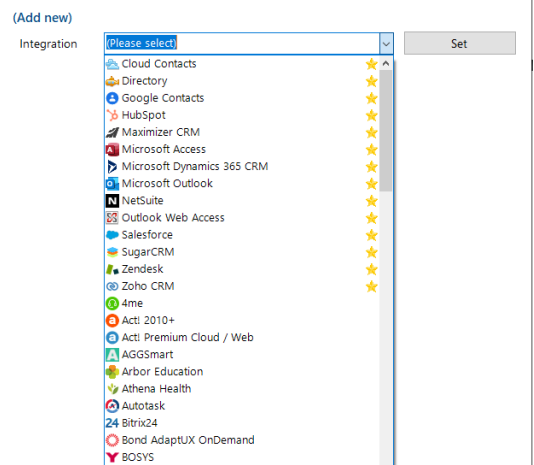
Contact Searching

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.

To set up an integration just select the "(Add new)" from the Configuration page and select an Application and click Set. To get help on setting up the integration just click on the blue help circle.



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