Binox Fundamentals Check List

01. Connecting your PSA to Binox CRM

Get full bi-directional sync and searching capabilities between your PSA and Binox CRM.

ConnectWise: [How to Setup your ConnectWise Account. | Binox MSP Help Center](#)

Autotask: [How to Setup your Autotask Account. | Binox MSP Help Center](#)

02. Setup your email provider

Send emails directly from Binox CRM, including Video emails, calendar invites with MS Teams and Zoom.

Microsoft 365: [Connecting Microsoft Office 365 to Binox. | Binox MSP Help Center](#)

G Suite: [Connecting G Suite to Binox. | Binox MSP Help Center](#)

03. Phone Dialer and SMS text

Select a phone number from your area code and start to engage with your prospects.

[**How to set up your Binox Dialer | Binox MSP Help Center**](#)

04. Import your contacts to Binox CRM

We made it easier for you to import your contacts or marketing lists to Binox.

Import Leads: [Importing your own Leads to Binox List Section. | Binox MSP Help Center](#)

Import Contacts: [Import to Contacts: Importing Contacts to Binox CRM. | Binox MSP Help Center](#)

05. Install the browser extension

Binox browser extension will help you find your ideal customer while you visit their website or linkedin profile

Browser Extension: [Binox Browser Extension | Binox MSP Help Center](#)

06. Binox Calendar Scheduler

Setup custom links and send to your prospects to schedule directly on your calendar - booking link.

Binox Scheduler: [Binox Scheduler. | Binox MSP Help Center](#)