BINOX MSP

Binox Blueprint
Mapping Your Way Around the Platform Basics

01

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.

G Suite: Connecting G Suite to Binox.

02

Define your roles and Permissions
Assign the appropriate permissions to each role, giving your users the right level of access to the platform's features.

Managing role-based user permissions

03

Invite your team
Get ready to take your team's productivity to the next level! Create a unified workspace where everyone can share, interact, and contribute.

How to add Additional Users to your Binox Account.

04

Import your contacts to Binox CRM
Get ready to take your team's productivity to the next level! Create a unified workspace where everyone can share, interact, and contribute.

Importing Contacts to Binox CRM.

05

Connecting your PSA to Binox CRM
Experience an exclusive PSA to CRM bi-directional sync for real-time updates, offering a unified view of your contacts.

How to Connect your PSA.

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