



Go Integrator User Guide

VERSION 2.3

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Product Summary

Linking a business database, such as Salesforce, with the Nextiva phone system is an excellent way to improve productivity. Go Integrator with Nextiva enables users to know who is calling while quickly accessing customer details. Go Integrator saves time with click to dial options, call pop, contact search, team presence, and more. This document covers the following features of Go Integrator:

- Tray Menu
- Click to Dial
- Answering Calls with Call Pop
- Using Call Pop to Open a Salesforce Profile
- Making a Call
- Team Presence

Product Requirements

- Windows 7, Windows 8 (Desktop), Windows 8.1 (Desktop), Windows 10 (Desktop)
- 1.8 GHz Pentium Class Processor (or higher)
- SVGA display
- 2GB memory
- 1GB free hard drive space
- Network adapter connected to a TCP/IP network
- Keyboard and mouse

Go Integrator - Configuration

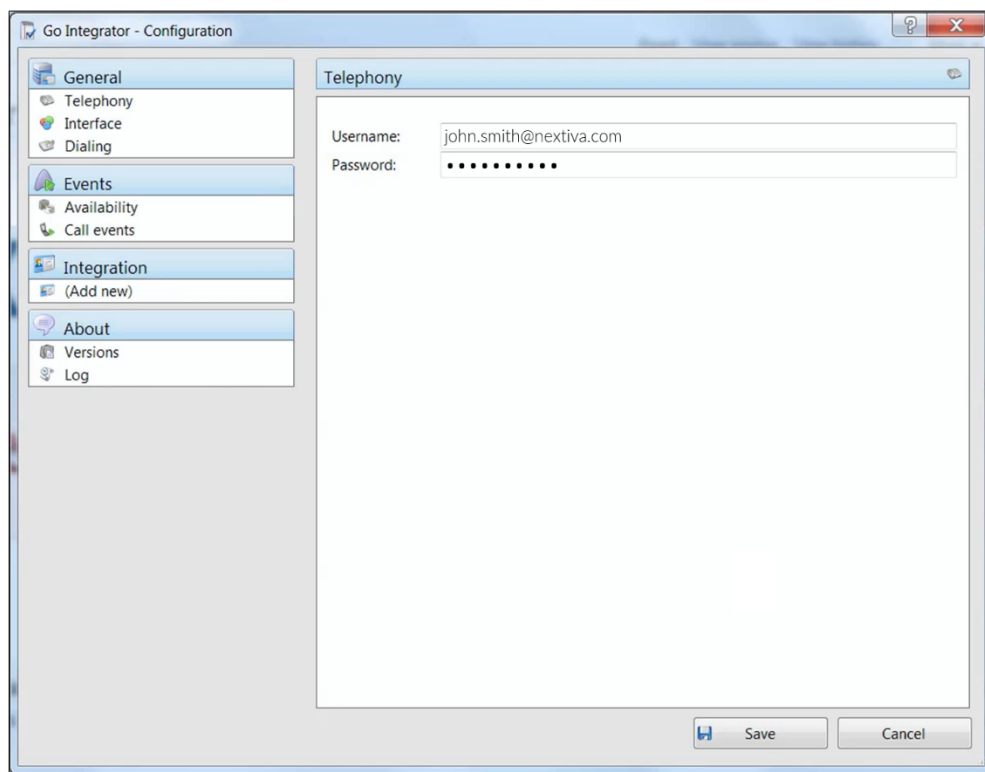
Once Go Integrator is installed on the computer (Windows), follow the steps below.

1. Right click on the Go Integrator icon in the system tray. The icon will likely be green but could be yellow or red.



Go Integrator Icons

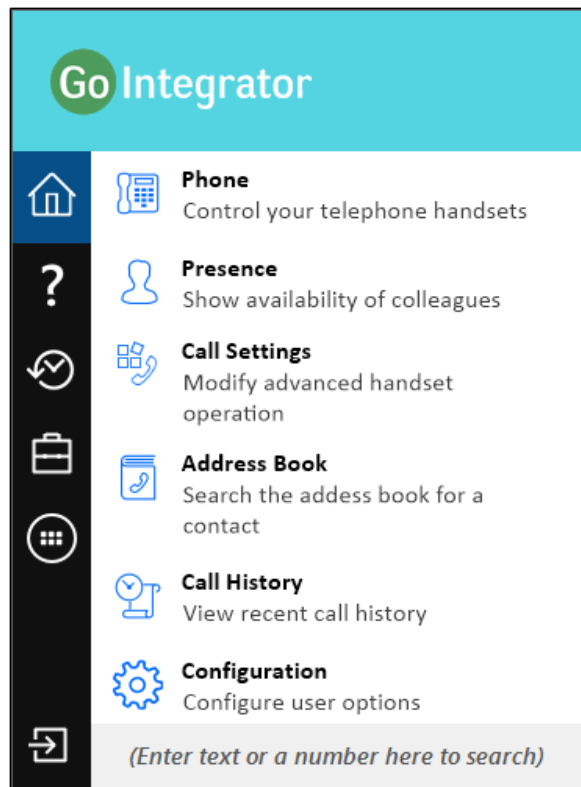
2. Select **Configuration** from the menu.
3. Enter the Nextiva Voice username, followed by @nextiva.com (e.g. john.smith@nextiva.com).
4. Enter the Nextiva Voice password.
5. Click **Save**.



Telephony

For a configuration with Salesforce or any other CRM, please contact our Amazing Service team by emailing support@nextiva.com to immediately open a case.

Tray Menu



Go Integrator Tray Menu

The tray menu is accessed by right-clicking on the Go Integrator Client icon which is a green square (or red if currently on a call, or yellow if a call is on hold). Users may need to select the system tray arrow to expand the system tray to locate the icon.



Go Integrator Icons

At the bottom of the tray menu is a text box where users can enter text or numbers to search. Results are displayed directly in the tray menu as text is typed into the text box. Calls can be made to any contacts found by clicking on the number displayed in the results.

(Enter text or a number here to search)

Go Integrator Search Field

The icons on the left side of the tray menu can be selected and perform the following functionality:

Menu



The **Menu** option allows users to access other parts of Go Integrator by clicking the appropriate option.

Help



The **Help** option opens the Go Integrator online help in the default browser. Double-click the option to view the article.

Recent Calls



Click **Recent Calls** to quickly see the recently dialed number. Click the number to redial.

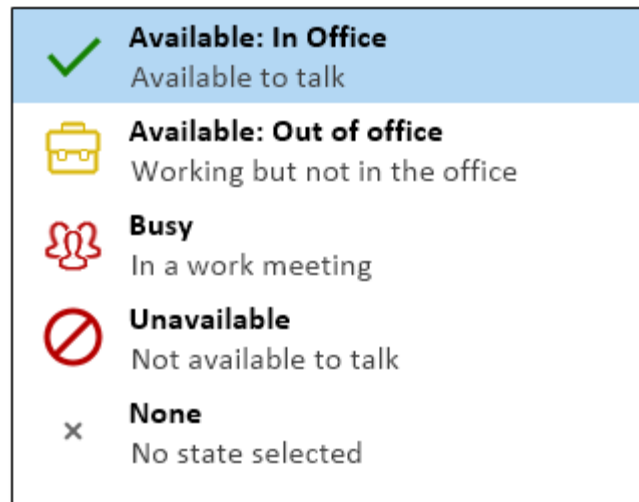
Recent calls		
	Rebecca Dean, Jangles LLC. +12025550145	17:23
	Wendy Rowell 8248	15:47
	Ian Deacon 3004	13:03
	Tim Smith +441154960583	11:41
	(Mobile services, UK) +447700900288	11:18
	Joe Cartwright, Acme Ltd. +442079460123	09:23
Show call history		

Recent Calls Window

CommPilot Express

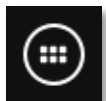


The **CommPilot Express** option allows users to quickly select their preferred CommPilot Express profile, changing their call status. Some versions either do not include or have modified implementations of this feature.

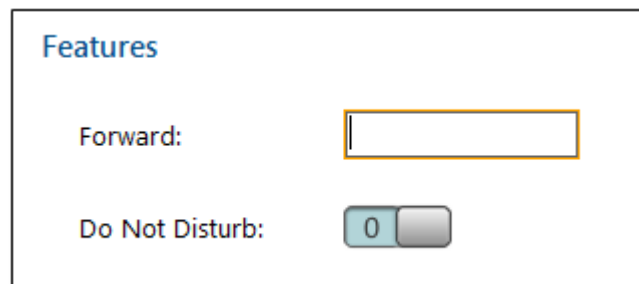


CommPilot Express Profiles

Features



The **Features** option allows users to control the behavior of their phones. Options may include Call Settings, Set Forward Alt, and Set Do Not Disturb.



Features Section

Exit



The **Exit** option exits the software and displays an exit message.

Click to Dial

The Click to Dial feature allows users to call a number by clicking on it within the Salesforce contacts. Once clicked, the dialer will appear on the left side of the screen showing the contact's name and information.

Mr. John Smith

Hide Feed

Post File Link Poll

Write something...

Share Followers

No followers

Phone (800) 285-7995

Open Activities (0) | Content Deliveries (0) | Opportunities (0) | HTML Email Status (0) | Activity History (0) | Google Docs, Notes, & Attachments (0) | CallEvents (0) | Contact History (2)

Contact Detail

Edit Delete Clone Sharing Send W-9

Contact Owner	Charlie Williams [Change]	Phone	(800) 285-7995
Record Owner Department	Learning Development	Number Called In On	Mobile
Contact Record Type	Inside Sales [Change]		Fax
Name	Mr. John Smith		Email
Account Name	test company 12		technical.support@nextiva.com
Title	Director of Technology	Email Opt Out	<input checked="" type="checkbox"/>
Department		Do Not Call	<input type="checkbox"/>
Reports To	Charles Williams [View Org Chart]	Pardot Grade	
Lead Source	Training	Pardot Score	
Contact 18 Char ID	0031O00003JT2ziQAD		
Record Types	Inside Sales		
Sent to Sales	<input type="checkbox"/>		

Click Number to Dial

Answering Calls with Call Pop

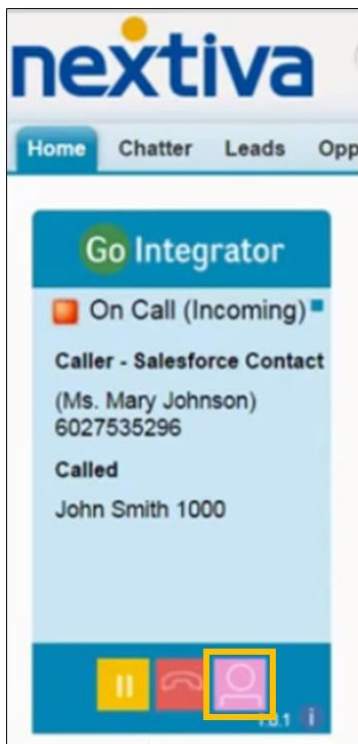
The Call Pop feature presents incoming calls in the upper-left corner of the Salesforce window with the Salesforce contact information readily available. To answer the call, click the green **Answer** button.



Answering a Call

Using Call Pop to Open a Salesforce Profile

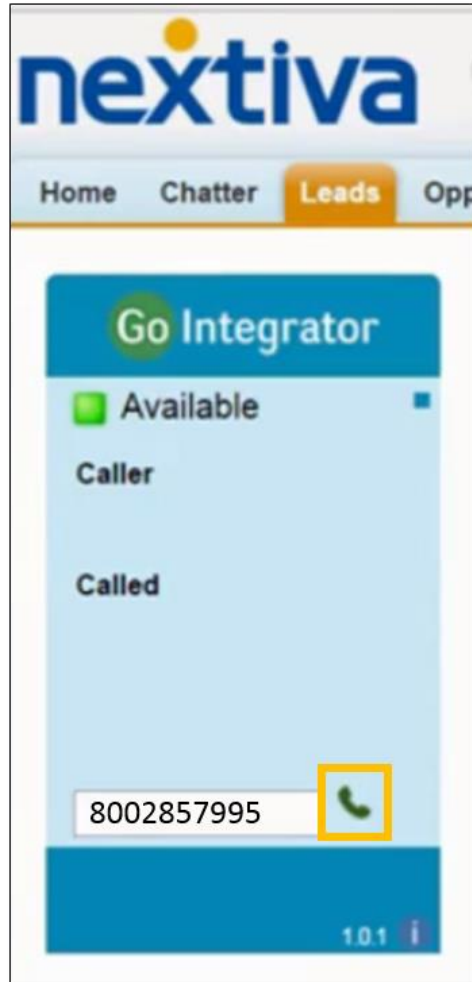
Quickly access the customer's Salesforce profile by clicking the pink icon on the right once the call is answered. This allows users to view the customer's Salesforce contact page without interrupting the call.



Opening Salesforce Customer Profile

Making a Call

Making a call is done by entering a ten-digit phone number in the dialer window, then pressing the green **phone** icon.



Making a Phone Call

Team Presence

Selecting the Presence icon will pop up a window that lists all members of the company's Global Contacts, including the following information, if available:

- **Presence:** Displays if the user is on an active call.
- **Telephone:** The extension associated with that contact.
- **Name:** The name of the contact.
- **Department:** The department the contact is a member of, if applicable.
- **State:** Their status on their phones.
- **Direction:** If they are on a call, this will display whether it is outbound or inbound.
- **DID:** The direct dial phone number associated with their user.
- **Email:** The email address associated with that user.
- **DND:** Will display whether the user has Do Not Disturb enabled.
- **Forward:** If the user is forwarding calls, this will display the phone number or extension it is forwarding to.
- **Contact:** Displays who in the organization is on the phone (if any) with the contact.
- **Group:** Displays which group, within the organization (if any), that contact may belong to.

The presence window uses a number of icons to designate the current state of a user.



Team Presence Icons

Additional Resources and Videos

Nextiva Go Integrator – Salesforce Basics

<https://nextiva-1.wistia.com/medias/w0girm6pbr>

Nextiva Go Integrator – Installation and Setup

<https://nextiva-1.wistia.com/medias/9kazz6ggwb>

Nextiva Go Integrator – Salesforce Integration

<https://nextiva-1.wistia.com/medias/k3kkeg0u22>

Nextiva Self Service Portal

<http://www.nextiva.com/support>