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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](image)

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

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

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.
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 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

<table>
<thead>
<tr>
<th>Available: In Office</th>
<th>Available to talk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available: Out of office</td>
<td>Working but not in the office</td>
</tr>
<tr>
<td>Busy</td>
<td>In a work meeting</td>
</tr>
<tr>
<td>Unavailable</td>
<td>Not available to talk</td>
</tr>
<tr>
<td>None</td>
<td>No state selected</td>
</tr>
</tbody>
</table>

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.
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](image)
Additional Resources and Videos

Nextiva Go Integrator – Salesforce Basics

https://nextiva-1.wistia.com/medias/w0gjrm6pbr

Nextiva Go Integrator – Installation and Setup

https://nextiva-1.wistia.com/medias/9kozz6ggwb

Nextiva Go Integrator – Salesforce Integration

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

Nextiva Self Service Portal

http://www.nextiva.com/support