Setting Up Salesforce Integration with Go Integrator DB for Nextiva

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Go Integrator is a powerful desktop-based Computer Telephony Integration (CTI) and unified communication software suite, which gives users a high level of integration and expanded communication options, as well as integration with the Nextiva voice platform.

Go Integrator allows you to dial any number with ease, sync customer records with our extraordinary voice platform and work collaboratively. It's not only guaranteed to save you time, but it is also very easy to set up and maintain, at a fraction of the cost of other integration tools.

Go Integrator for Nextiva comes in two versions: Lite and DB (database). The DB version, required for Salesforce integration, syncs with many standard databases and CRM applications.

For Salesforce integration, please follow the directions below. To set up other integrations, such as Outlook, **please click here.**

Before beginning Salesforce Integration, please be sure you have installed Go Integrator by following the instructions **here**.

> **NOTE:** To log in to Go Integrator DB you must first purchase the appropriate package. Please call 800-799-0600 to add the package to the User account, then proceed with the instructions below.
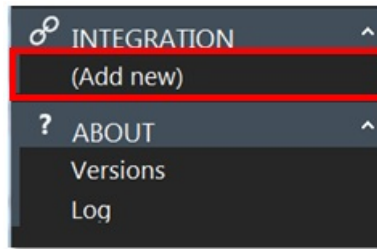
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Setting Up Salesforce Integration:

1. After installation and successful sign in with your @nextiva.com username, right-click the green **Go Integrator** icon , then select **Configuration.**
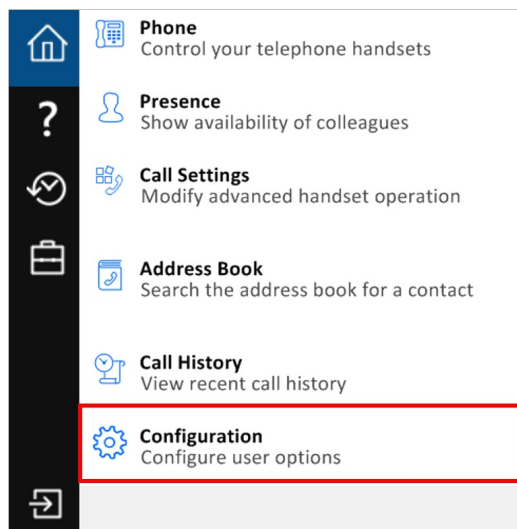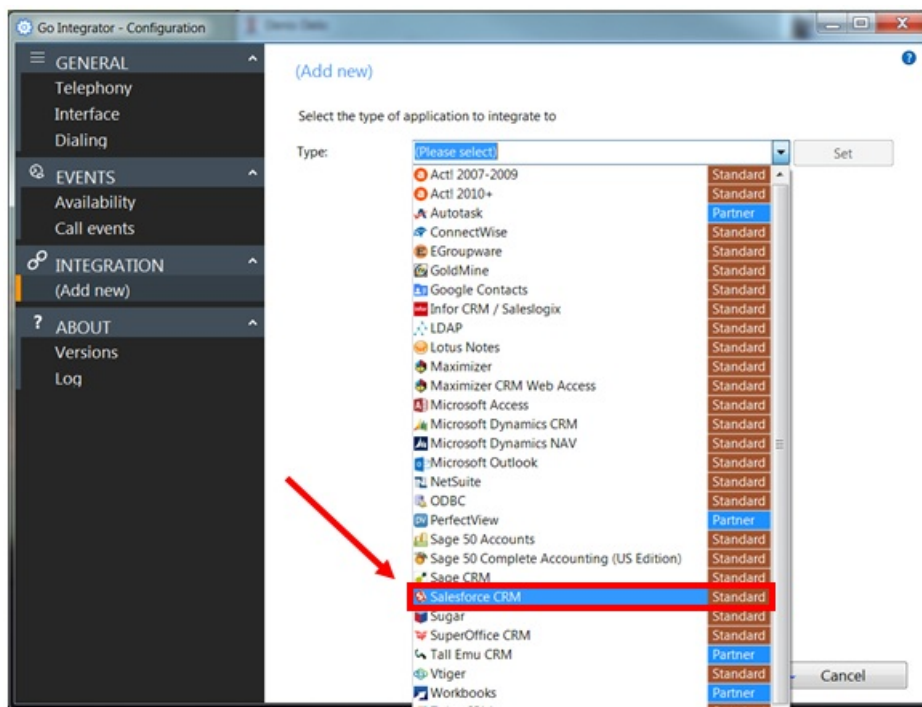
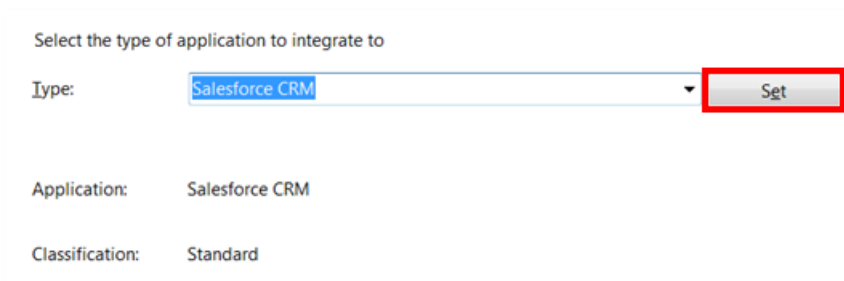2. Under the **Integration** section on the left menu, select **(Add new)**.

Adding a New Integration

3. Click the drop-down arrow next to **Type**, then select **Salesforce CRM**.

Salesforce CRM Selection

4. Click the **Set** button.

Setting Salesforce CRM

5. Enter your Salesforce login information in the expanded sections, ensuring to add the Salesforce token to the end of your password without a space. For example, if your password is **password,** and your Salesforce security token is **abc123**, enter **passwordabc123**. If you need to reset your Salesforce token, **click this link**.

Salesforce CRM Login Information

6. Click **Save** at the bottom of the window. After a successful login, Go Integrator should now show an **On Hook** message when hovering over the **Go Integrator** icon .

Download:

Go Integrator
User Guide

Manuals+,