CONNECTOR

Mongoose + Salesforce: Smarter Conversations, Connected to Your CRM

Mongoose, the AI Engagement Platform, connects natively to Salesforce, including TargetX, so your text messages, Web Chat conversations, and contact data stay in sync.

Setup is simple, with options for both automated and manual control. Conversations flow into Salesforce in real time, so your team doesn't have to toggle between systems to see what a student, parent, or alum last said. Salesforce stays your system of record, and Mongoose makes it more valuable.

Connector Highlights

Time Savings

- Contact data and messaging activity move automatically between Mongoose and Salesforce.
- Records stay accurate, with message activity tracked in real time.
- Staff stop toggling between systems and spend that time on students.

Contact Capture from Web Chat

- Capture leads, contact details, and text-messaging consent in Web Chat conversations.
- Keep prospects, students, and donors engaged after the chat ends.

Better Outreach Campaigns

- Text campaigns run on current contact information.
- Data refreshes automatically, so messages reach the right contacts.

One View of Every Conversation

- Track every Text and Web Chat conversation inside Salesforce.
- Give staff clear visibility into engagement history on the contact record.

How the Salesforce Connector Works

Text: Two-Way Sync

Contact records sync from Salesforce into Mongoose. Text messaging activity and opt-out preferences sync back to Salesforce, so communication history stays in one place.

Web Chat: One-Way Sync

When a Web Chat conversation closes, Mongoose saves the transcript to Salesforce as a Task on the contact.



Get More from Salesforce with Mongoose

Every conversation matters.

Ready to get more out of your CRM? See every Mongoose connector at help.hellomongoose.com/integrations.

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