

8x8 Virtual Office Telephony Interface for Salesforce

User Guide

May 2014

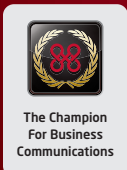


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8x8 Virtual Office Telephony Interface for Salesforce

This telephony interface allows you to integrate your VO extension with Salesforce. You can easily place and receive calls directly from Salesforce and automatically display contact information based on the caller's phone number when you receive a call.

To place a call, just click on the phone number of one of your Salesforce contacts or use the 8x8 dialer. When you place a call using the telephony interface, your phone rings first. When you answer the phone, it automatically rings the person's number you are calling.


When you receive a call, the interface enables you to see who is calling by displaying the Salesforce contact record. If the contact is not found in your Salesforce contacts list, the app will indicate "No search results for this call" and your phone will ring.

System Requirements

The app is compatible with Salesforce 14 and Professional Edition and requires one of the following:

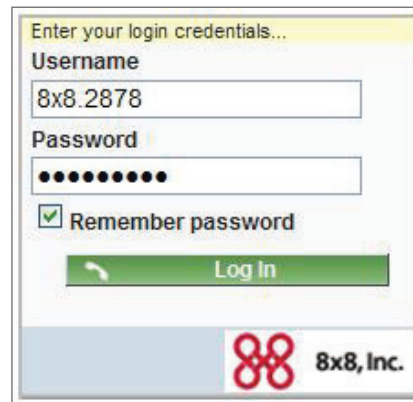
- Internet Explorer 8 or later
- Firefox 5 or later (it is slower on version 3.5)
- Chrome 10 or later
- Windows XP, Windows Vista, Windows 7 (32 bit and 64 bit) and 8

Using the 8x8 Virtual Office Telephony Interface

To launch the telephony interface for Salesforce, navigate to the **Programs** folder of the **Start** menu on your computer and click on 8x8 Virtual Office for Salesforce. You should now see  in the system tray at the bottom right corner of the screen.

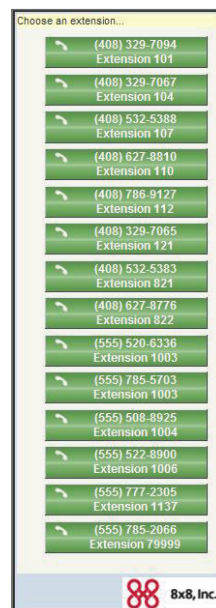


If you are currently logged into Salesforce.com, you should see the login prompt for the 8x8 Salesforce Integration on the upper left-hand side of the screen.



Please enter your Virtual Office Online username and password. If you don't have a Virtual Office Online username and password, please contact your phone system administrator.

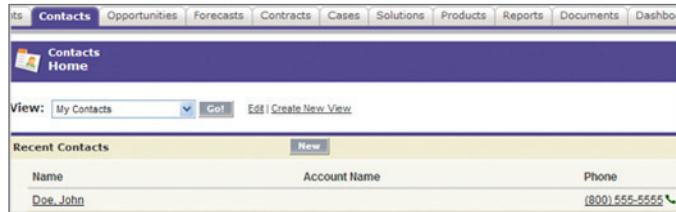
If your Virtual Office Online profile is associated with multiple extensions, you will see the following screen:



Select the extension that you wish to associate to make and receive calls.

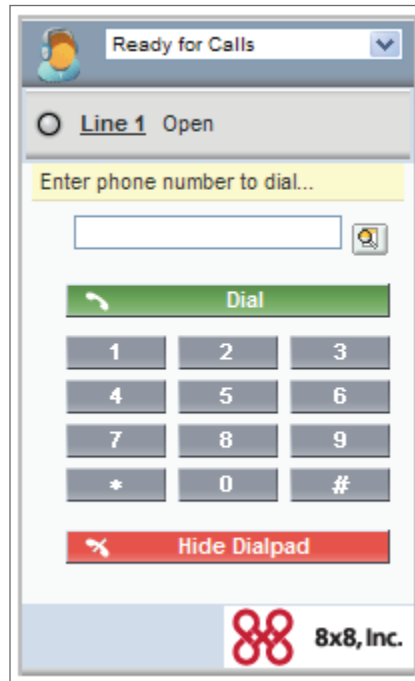
Making Calls

Once logged into the telephony interface, you may place calls by clicking on a contact's phone number while in the Contacts area of the application.

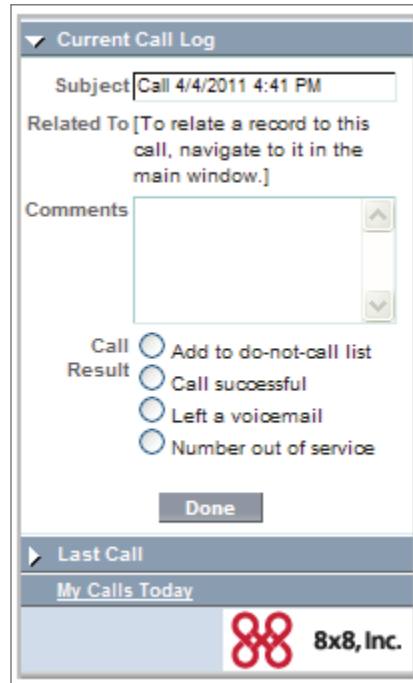



When you click on a contact, your Virtual Office phone will ring. Answer the phone and you will hear the phone ringing as Virtual Office calls your contact.

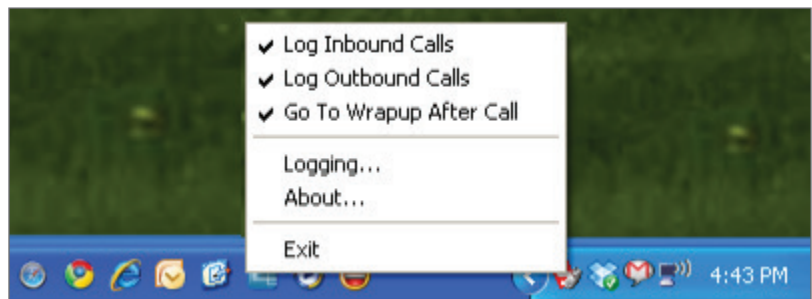
You may also directly enter a number to dial by clicking on Line 1 in the 8x8 window to bring up the dial pad. To make a call: Dial 7 digits for local and 11 digits for long distance. e.g., 1-408-555-1212.



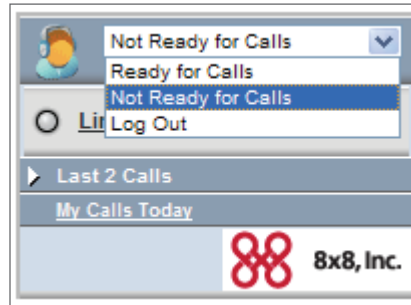
By default, you will be prompted to enter a summary after making a call.



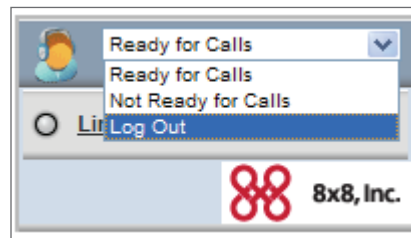
You can turn this option on or off by right-clicking on the  in the system tray and selecting **Go To Wrapup After Call**.




By default, an alert will be displayed for an incoming call. To turn this off, select **Not Ready for Calls** from the drop-down menu of the telephony interface.



To log out of the telephony interface, select **Log Out** from the drop-down menu of the 8x8 window.



To completely exit the 8x8 Virtual Office telephony interface and make the 8x8 window disappear, right-click on the  in the system tray and select **Exit**.

