LOG IN

1. Find the **8x8 Phone** communication panel:

   • **Salesforce Classic**: In the upper-left corner of the **Home** tab, access the panel.

   • **Salesforce Lightning**: In the footer of any tab, click **8x8 Phone** to open the panel.

2. Enter your Virtual Office credentials, and click **Login**.

CONFIGURE SETTINGS

Depending on how you use Salesforce, you can change your settings to suit your needs. Based on standard practice, we recommend the following settings under **Menu > Settings**.

Configure CRM Objects to Search

Salesforce users in different roles must communicate with specific categories of Salesforce objects.

For example, as a Lead Qualifier, you only call Leads; you can exclude Accounts, Contacts, and Cases from your search results.

Configure Behavior

You can set the calling behavior of the communication panel to streamline your Salesforce experience; enable a convenient click-to-call, or allow your desk phone to automatically answer and dial out from Salesforce.

You can also choose whether screen pops appear on both inbound and outbound calls, whether you can see a second screen pop while on an active call, and more.

We recommend the following settings:

Configure Contacts

If you communicate frequently with Salesforce contacts but not with corporate contacts in your Virtual Office directory (or vice versa), you can sync with the desired contact category so that it shows up in the contact list of your communication panel.

Configure Call Outcomes

When in the **Notes** tab of the communication panel's call screen, you can select from a list of call outcomes to indicate how the call ended. In your settings, you can select whether this list of call outcomes is populated from Salesforce or 8x8.

CREATE CONTACTS

Maintaining an up-to-date list of contacts is key to ensure a seamless calling experience in Salesforce. When you create a Contact, Account, or Lead, you have on-demand access to their contact information and details on your previous interactions.

> **Note:** You can also create new contacts during calls with unknown numbers.

1. In the **Contacts** tab, click **Create New**.

2. Begin creating an Account, Contact, or Lead.

3. Enter the relevant information in the window that pops up, and save.

PLACE CALLS

To place calls from the 8x8 communication panel:

• Dial manually from the dialpad.

• Select from your recent calls.

• Select from your contact directory.

> **Note:** Only contacts are listed in the directory; the directory does not list Accounts, Leads, and so on.

In addition, you can click to call any phone number visible in Salesforce, if enabled in the communication panel under **Menu > Settings**.

RECEIVE CALLS

When you receive a call, you can immediately see in the 8x8 communication panel whether an existing Salesforce or company contact is calling you, or if the number is unknown.

If enabled under **Menu > Settings** in the communication panel, you can also view a screen pop (outside of the panel) with details on a known caller.

You can control whether the screen pop:

- Opens in a new tab or window.
- Appears when the call rings or when you answer.
- Appears on outbound or inbound calls, or both.

The screen pop offers detailed contact information; view prior communications, opportunities, campaigns, cases, and much more.
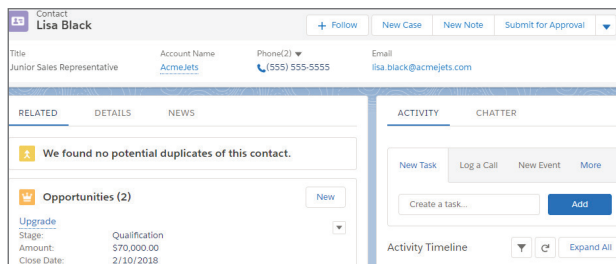

The screen pop remains open during and after the call; you can access information while logging your call in the communication panel, and you can email the contact or create new tasks accordingly from the screen pop.

MANAGE CALLS

While on a call, you have access to three sub-tabs:

- **Controls**: Manage your call via controls to hold, transfer, or record the call, as well as merge two concurrent calls.

- **Assign**: Select the correct caller profile to ensure an accurate call log if you are speaking with an unknown number or a number with multiple matches.

- **Notes**: As the call continues, take notes for a more thorough call log and followup with the contact.

Note: If you do not log your call, your notes are not saved for future reference.
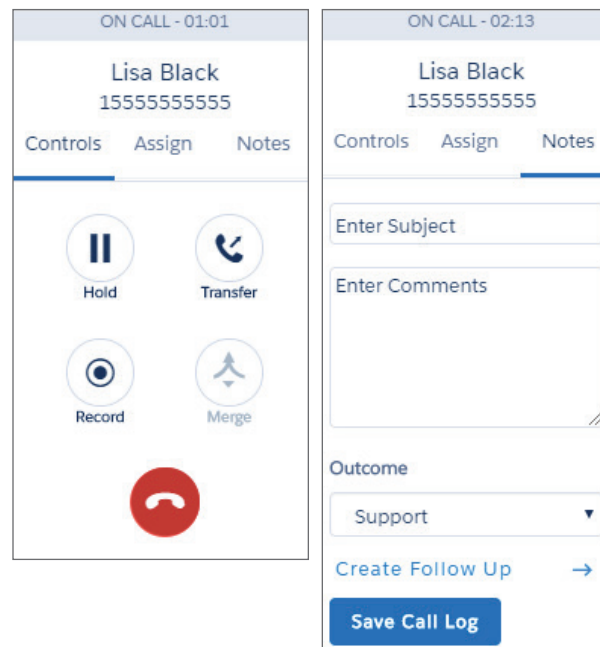
LOG CALLS

During or after a call, use your call notes to create an informative call log, which you can then access under **Past Activity** in the relevant contact's details page. You can log calls for unknown numbers as well as for existing contacts.

Log Calls Immediately

The best time to log a call is immediately after the call ends; use notes taken during the call to create a call log for future reference.

1. After a call ends, go to the **Notes** tab of the call screen that remains open.

2. Finish entering information important to the call, and click **Save and Close**.

Log Unworked Calls

If you do not log a call immediately after it ends, the call shows up in the **Recents** 🕐 tab of the 8x8 communication panel.

1. Go to 🕐 > **Unworked**.

2. In the list of unworked calls, hover over the desired call, and click the **Log Call** 📋 icon.

3. Enter information important to the call, and click **Save and Close**.

4. Once you have logged all noteworthy calls, click the **Delete** 🗑 icon next to **Unworked** to clear the list.

8x8