

8x8 Virtual Office Sage ACT! Integration User Guide

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8x8 Virtual Office Sage ACT! Integration

Virtual Office ACT! Integration allows you to place and receive calls using your ACT! application. You can click your mouse to place calls right from your ACT! contact record. And when you receive calls, a pop up appears on your monitor with information about your caller.

To place a call, just open a contact record and select **8x8 Call** option from the top menu. When you place a call through your ACT! application, your phone or softphone rings first. When you answer the phone, it automatically rings the person you are calling.

When you receive a call, ACT! Integration enables you to see who is calling by displaying a screen pop containing that caller's contact information. If the contact is not found in your ACT! contacts list, a screen pop showing the phone number of the person calling is displayed.

Please note that ACT! Integration does not monitor the status of the call once it is placed, and does not provide call handling or call management.

System Requirements

Virtual Office ACT! Integration works with Sage ACT! 2007 or higher for Microsoft Windows.

Uninstalling ACT! Integration Software

If you need to uninstall an existing version of Virtual Office ACT! Integration software, follow these steps:

1. Launch the Windows Control Panel.
2. Select **Add or Remove Programs**.
3. Select the appropriate version of 8x8 Virtual Office ACT! Integration software and click **Change/Remove**.

Installation

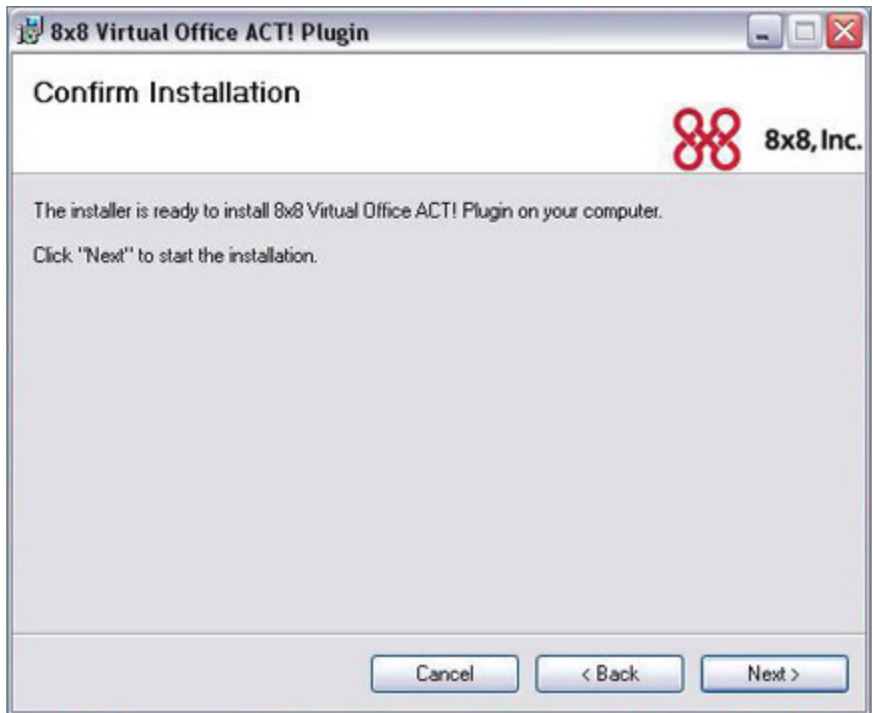
1. Close all software applications on your PC.
2. Run the setup executable file.
3. The installation wizard will walk you through a simple installation process.

Step by Step Installation

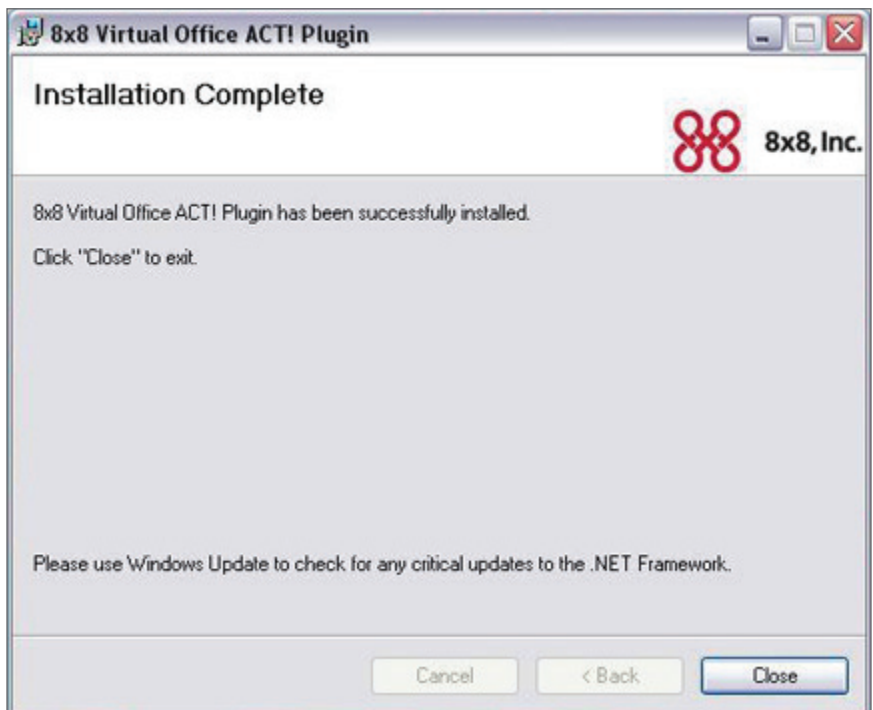
You will see the welcome screen for the Virtual Office ACT! software. Click **Next** to begin.



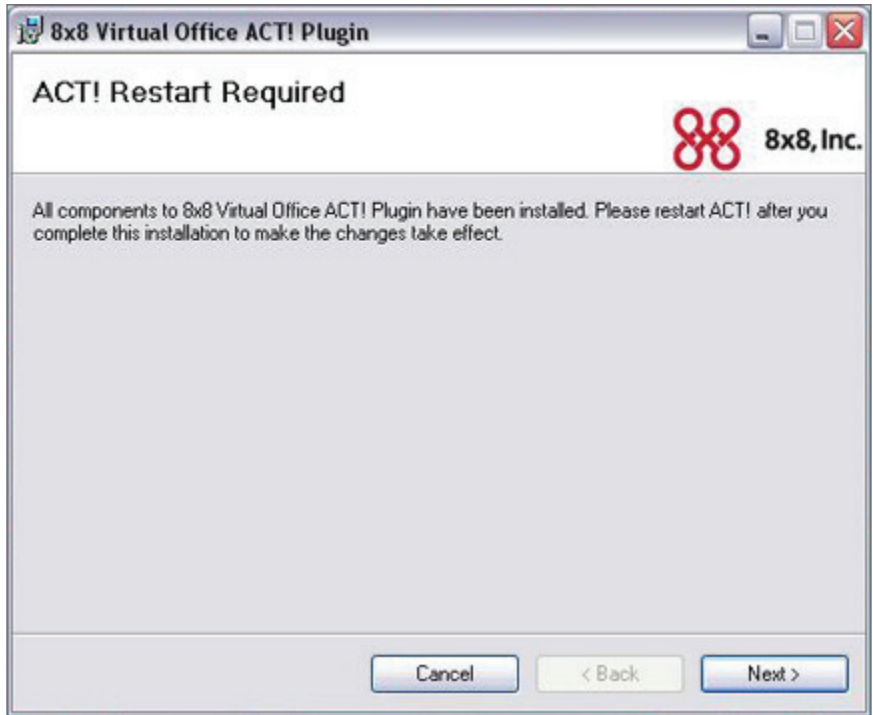
At the **Confirm Installation** screen, click **Next** to install it.



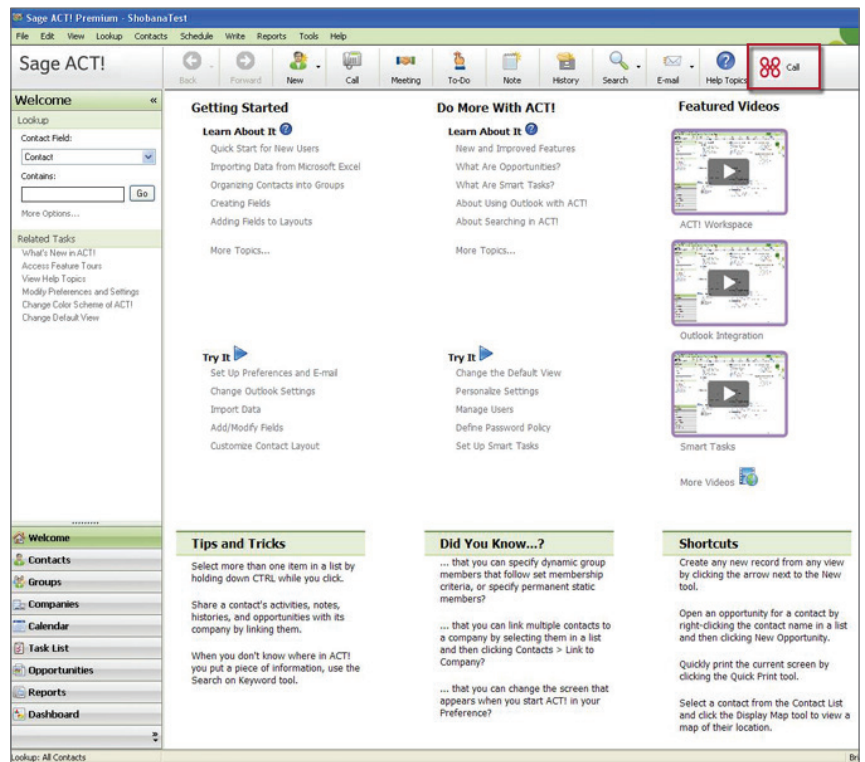
When installation is complete, you will see the screen below. Click **Close**.



You will see the **Restart Required** screen next. If you have ACT! open, please restart it.



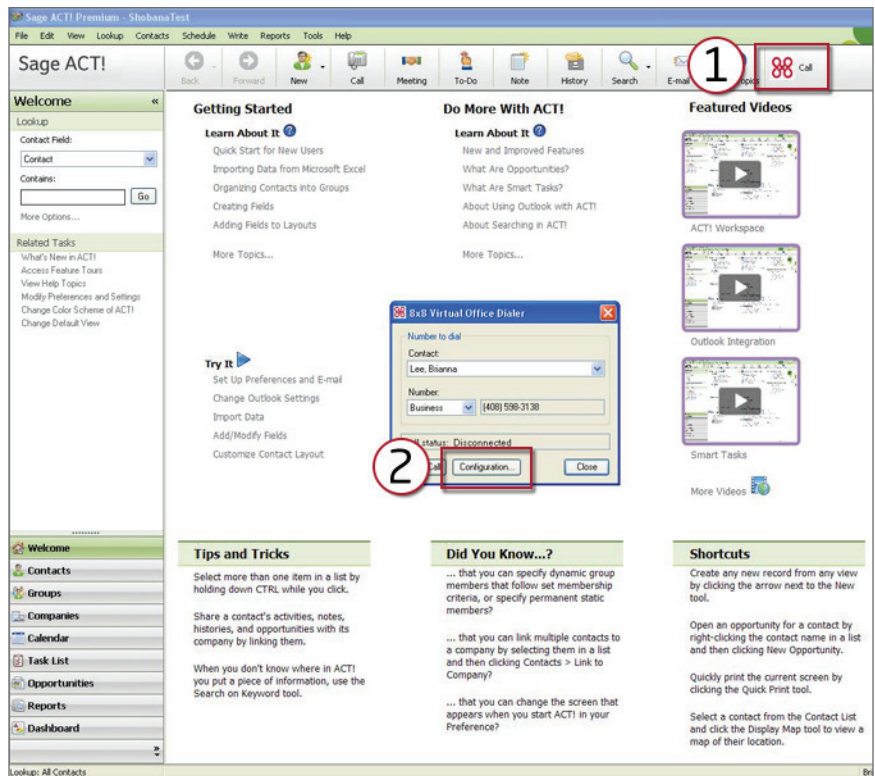
Once you restart ACT!, you will see the **8x8 Call** icon on the top menu of your ACT! navigation.



Configuring ACT! for Virtual Office

Now that you have installed the 8x8 Virtual Office ACT! Integration software, you need to configure it.

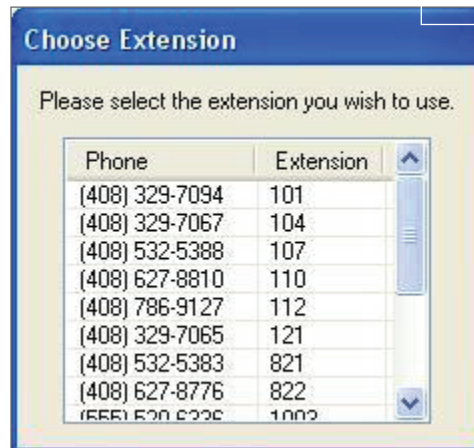
1. Start ACT! and select **8x8 Call** from the top menu. The 8x8 Virtual Office Dialer will pop up.
2. Click **Configuration** on the Dialer menu.



3. 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.



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



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

Your ACT! application is now configured to make and receive calls.

Using ACT! to Make and Receive Calls

By this time, you have installed and configured your Virtual Office ACT! Integration software. When you configured the software, you associated your extension number with ACT!. Now the software can use this extension to make calls. It also listens for calls coming to this extension.

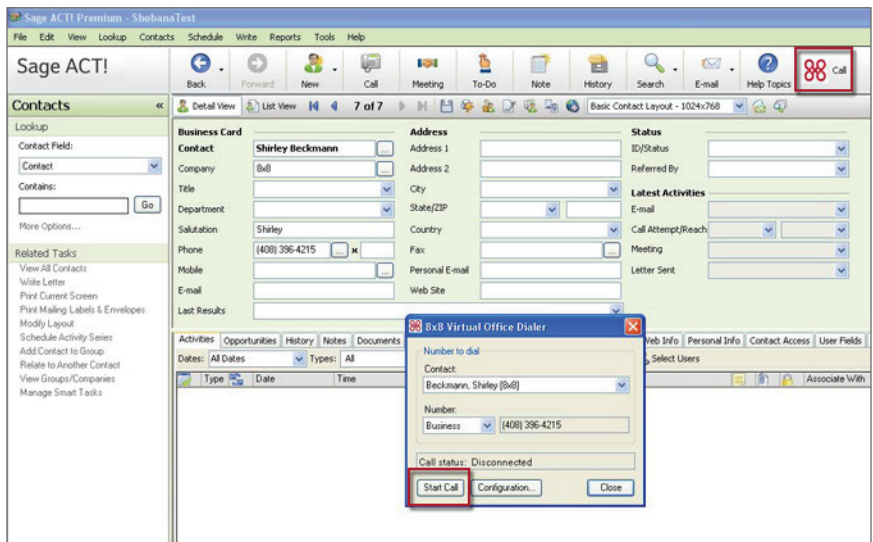
Making Calls

From one of your contact records, select the **8x8 Call** option from the top menu.

Once you've selected **8x8 Call**, you will see the Virtual Office Dialer.

- Select any of the numbers you have listed for your contact from the drop down menu.
- Click **Start Call**.

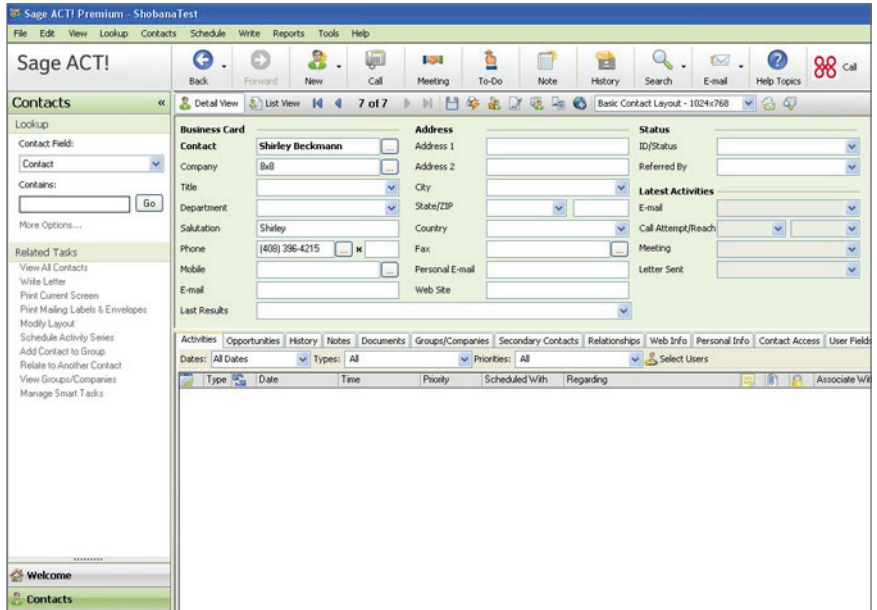
Your phone or softphone rings first. When you answer the phone, it automatically rings the person you are calling.



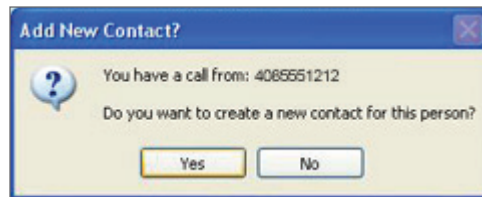
Receiving Calls

When your extension receives a call, a pop up window will appear on your computer screen.

If the caller is one of your ACT! Contacts, their contact record will automatically open on the screen.



If the caller is not in your ACT! contacts, you will see this dialog box and you will be prompted to add the contact.

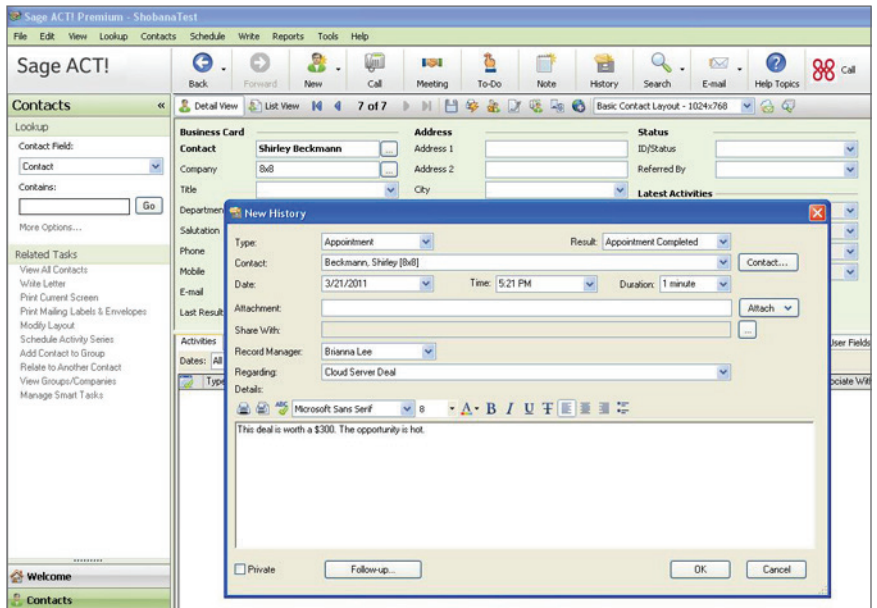


If you say **Yes**, you will be prompted to enter the caller's information and you will be able to save it to your ACT! contacts list.



A dialog box titled "New ACT! Contact" with a blue header. It contains three input fields: "Company:" with the text "8x8", "Contact:" with the text "Bud Quakenbusk", and "Phone:" with a dropdown menu set to "Business" and a text field containing "(408) 555-1212". At the bottom are "Save" and "Cancel" buttons.

Once the call ends you will be prompted to enter some notes about the call.



The screenshot shows the Sage ACT! Premium software interface. The main window displays contact information for Shirley Beckmann. A "New History" dialog box is open, allowing the user to record a call. The dialog includes fields for "Type" (Appointment), "Result" (Appointment Completed), "Contact" (Beckmann, Shirley [8x8]), "Date" (3/21/2011), "Time" (5:21 PM), and "Duration" (1 minute). There is a text area for "Details" containing the note: "This deal is worth a \$300. The opportunity is hot." The dialog also has "Private" checkbox, "Follow-up..." button, and "OK" and "Cancel" buttons.

To turn off this option, you can return to the configuration screen (See [Configuring ACT! for Virtual Office on page 7](#)) and uncheck **Display summary after call is completed**.

