

The logo consists of the text "8x8" in a bold, red, sans-serif font. The background of the slide is a blurred office scene with people working at computers, overlaid with a light blue tint. A vertical yellow bar is positioned to the left of the main text.

8x8

Salesforce for 8x8 Partners

Instructor led Webinar
Michelle Kaltenberg, Instructor

Agenda

1. Introduction & Positioning
2. Partner portal Quotes and Orders
3. Additional orders



1. Introduction and Positioning

The What and Why's?

1. Introduction & Positioning

- Salesforce.com or SFDC
- All new orders should be done in SFDC not Agent Portal
- Replaces agent portal for ALL orders.
 - Retiring soon
 - Date TBA



Salesforce is split into 3 key Areas

Lead

Track prospects apart from your contacts and opportunities with Salesforce leads.
After you've qualified your leads, convert them to contacts and create accounts and opportunities for those accounts

Account

Use Salesforce accounts to store information about your customers or the entities you are working with.

Opportunity

Track and manage your potential deals with Salesforce opportunities

Session Outcome

- By the end of this session you will be able to:
 - Build and manage your 8x8 funnel in SFDC
 - Create new customer quotes
 - Place orders from quotes
 - Create add on quotes/orders

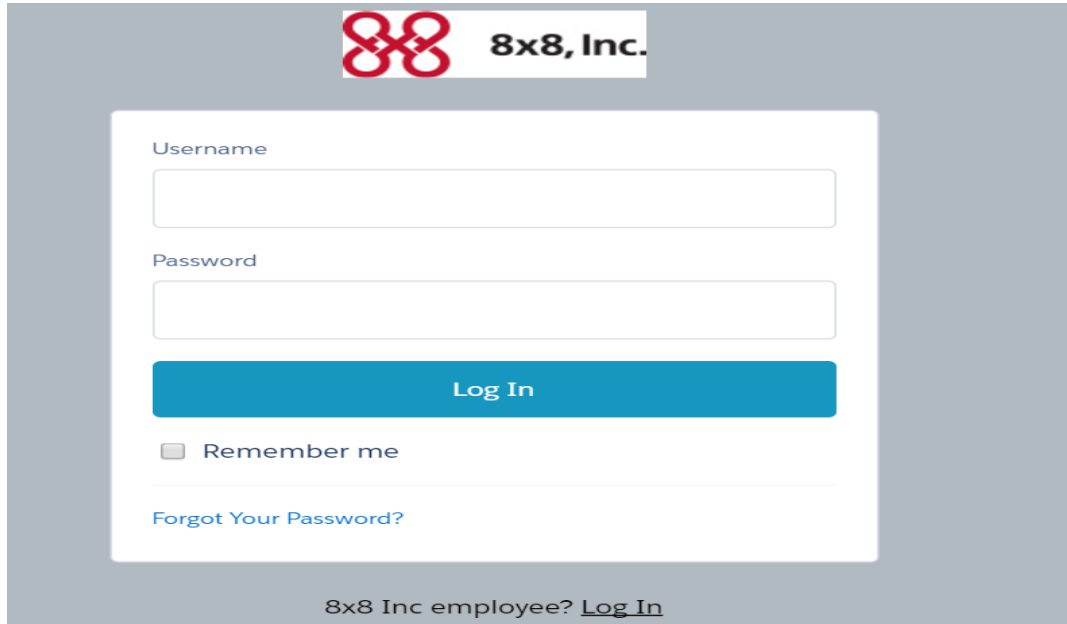




2. Salesforce Ordering

Here, let me show you...

Login to Salesforce



8x8, Inc.

Username

Password

Log In

Remember me

[Forgot Your Password?](#)

8x8 Inc employee? [Log In](#)

Username and log in details will be sent out to you from your CAM to your email

Emails sent to you by the admin to your email that was created by your CAM

For password issues or log in issues send an email to sfdc@8x8.com

<https://8x8.force.com/partners/login>

Home Page

8x8, Inc. Search... Search Daniel Barrett

Home Leads Accounts Contacts Opportunities

Shortcut
Calendar

Recent Items
0300087412
00044677
Academy Test
8x8 Academy-
a0m5000004VygC
8x8 Academy
PowerKeys-
PowerKeys-
PowerKeys
PowerKeys

Quote/Order Search
Quote/Order Search
Orders Created Last 90 Days
Account Owners and Orders
created last 90 days
My Orders Last 30 Days
My Orders Last 60 Days
My Orders Last 90 Days
My Quotes Created Last 30 Days
My Quotes created Last 60 Days
My Quotes created Last 90 Days

Set Preference
Set Preferences

My Tasks New Overdue

You have no open tasks scheduled for this period.

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Access:
leads
Accounts
Contacts and
Opportunities.



First step – Set Preferences

The screenshot displays the Salesforce user interface. On the left, a sidebar contains a 'Recent Items' list with entries like 'gatestcwpscomp', 'Rafferty and Co', and '0300079359'. Below this is a 'Set Preference' section with a highlighted 'Set Preferences' button. The main content area shows a 'Change Preference' dialog box for the URL 'https://c.na3.visual.force.com/apex/SA8x8_PartnerSelectionPage'. The dialog has a 'Parameter Section' with three rows: 'Partner' set to 'CWPS', 'Role' set to 'P8_SALES_LVL1', and 'Region' set to 'USA'. 'Save' and 'Cancel' buttons are at the bottom of the dialog.

Recent Items

- gatestcwpscomp
- Rafferty and Co
- Rafferty and Co
- 0300079359
- 0300079674
- FARMERS INSURANCE-JOE HUFFORD
- 0300079750
- 0300076412
- Blue Hills Nursery: Overhead Paving 4-1-16
- 00036808

Set Preference

Set Preferences

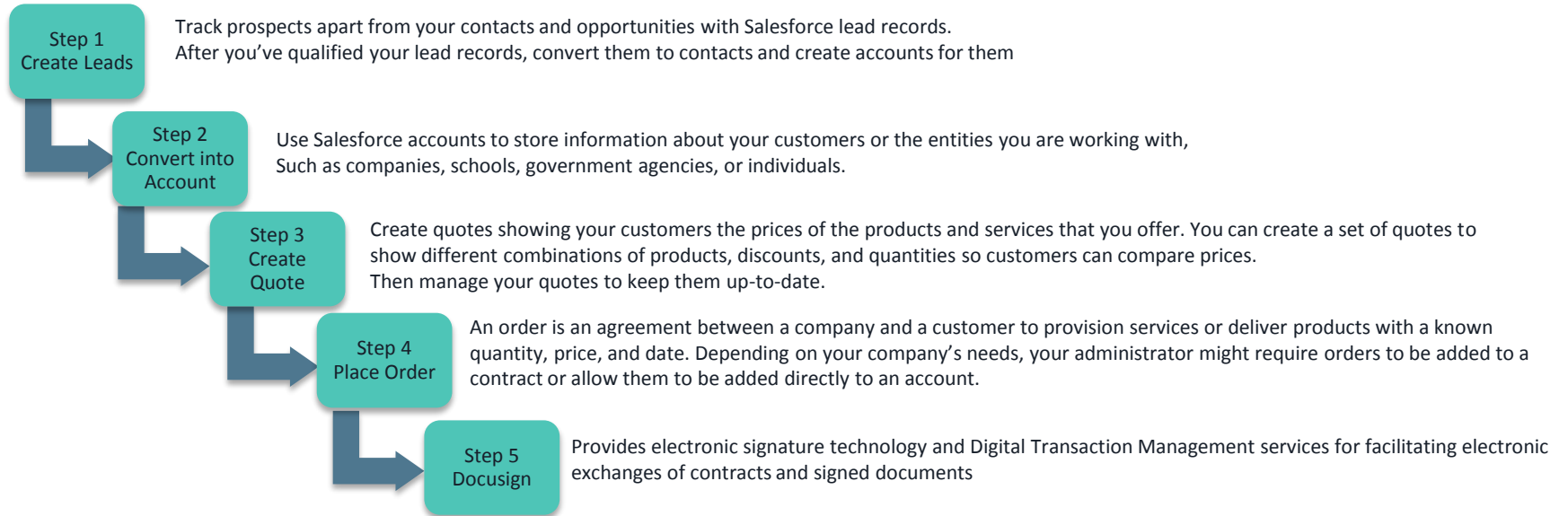
Change Preference

Parameter Section

Partner	CWPS
Role	P8_SALES_LVL1
Region	USA

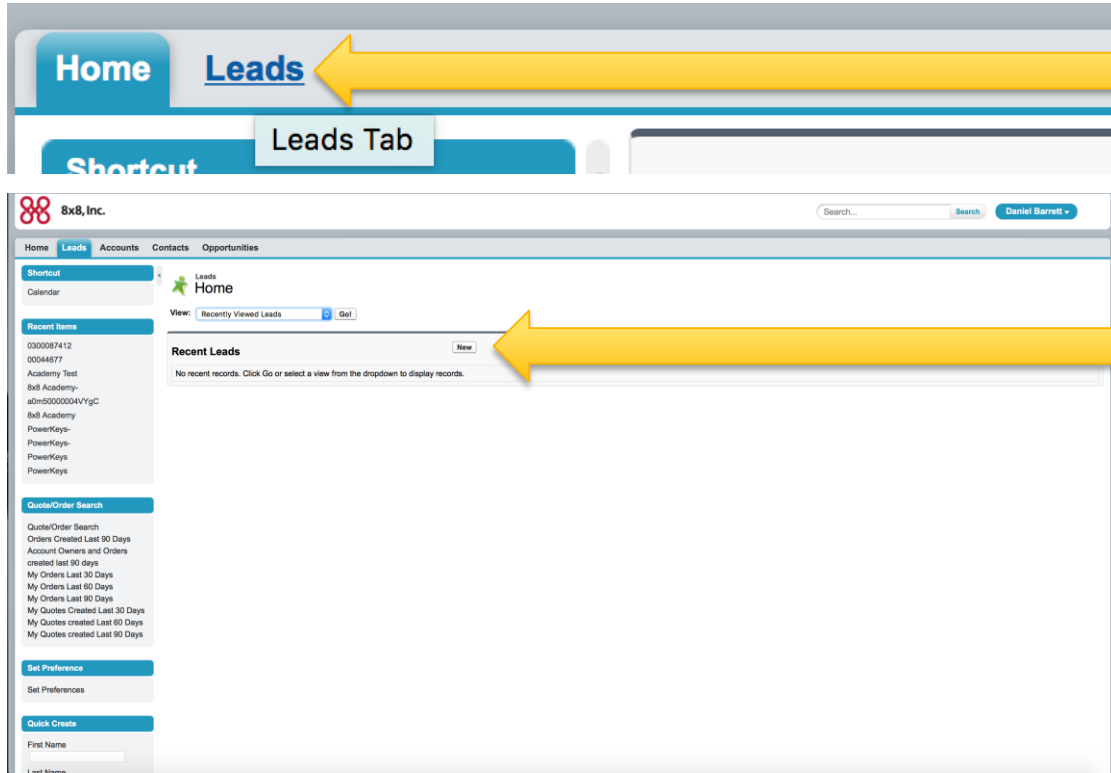
Save Cancel

5 steps to placing orders for new customers



Source: <https://help.salesforce.com/>

Create Lead



Click on the Leads tab at the top to get to the leads section.

Click on the “New” button to create a new lead. (all new orders start as a new lead)

New Lead

Once at the new lead page, please note that only the fields with **RED** bars next to them need populating.

| = Required Information

(Please take note of the other fields as these can be useful later on when building more advance features.)

Saved Lead

The screenshot displays the 8x8 CRM interface. At the top, there's a navigation bar with 'Home', 'Leads', 'Accounts', 'Contacts', and 'Opportunities'. Below this, a sidebar on the left contains various navigation options like 'Shortcuts', 'Recent Items', and 'Quota/Order Search'. The main content area shows the lead profile for 'Oliver Barrett'. A yellow arrow points to the 'Convert' button in the top navigation bar of the lead detail view.

Lead Detail

Contact Information

Lead Owner	Oliver Barrett (Change)	Lead Record Type	Mid Market
Company	Barrett	Lead Status	Open
Name	Oliver Barrett	Rating	Rating
Title		Timeline	
Role		Industry	
Phone	01234 567890	Do Not Call	<input type="checkbox"/>
Office Phone		Email Opt Out	<input type="checkbox"/>
Email	olbarrett@barrett.com	Address	
E-Rate		Fax	
Secondary Email		Website	
Extension		Lead Approved?	<input type="checkbox"/>
Mobile			
No. of Employees			
Annual Revenue			
Business Description			
Description			
New to Cloud	<input type="checkbox"/>		

General - Qualification

Primary Interest	Timeline
Service Interest	Timeline Notes
Other services needed?	Budget?
Reason for looking?	Who are the decision makers?
Consulting event?	Primary Decision Maker
Estimated Number of Locations	Estimated Decision Date
Number of Sites	Existing Contract?
Number of Lines/Racks	Contract End Date
# of Agents	Completion
Feature must-haves, which-are?	

Channel Partner Deals

Channel Partner	Channel Partner 2
CP Account Manager	CP Account Manager 2
CP Invoiced & Paid	Channel Partner Manager
	Channel Owner

Now the lead has saved click the convert button to progress to the next stage. Converting the lead.

Convert Lead to Account

The screenshot shows the 8x8 CRM interface. At the top, there are navigation tabs for Home, Leads, Accounts, Contacts, and Opportunities. The user is logged in as Daniel Barrett. The main content area is titled 'Convert Lead' for 'Oliver Barrett'. Below the title, there is a 'Convert' button. A large yellow arrow points to this button. The form contains several sections: 'Record Owner' (Daniel Barrett), 'Send Email to the Owner' (checkbox), 'Account Name' (dropdown), 'Opportunity Name' (Barrett), 'Converted Status' (Converted Leads/Qualified), 'Task Information' (Subject, Due Date, Comments, Priority, Date Completed, Activity Currency), 'VCC Sales Tenant Info', '8x8 VO Salesforce Integration' (Call Start Time, Call End Time, Extension, Call Type, Call Result, Call Recording List), and 'Reminder' (checkbox).

Now click convert.

System also creates an opportunity with lead conversion if box is checked

Note: System will search all fields for duplicates: email, phone, name, etc. Will not be allowed to convert if duplicate in another Salesforce record

New Partner Account Created

The screenshot displays the 8x8 CRM interface for a newly created partner account. The account name is "Dan Barrett Test". The account details section shows the following information:

- Account Owner:** Daniel Barrett (Change)
- Comp:** NA
- ETS Agent:** [None]
- Account Name:** Dan Barrett Test (View History)
- AKA:** [None]
- Company Name:** Dan Barrett Test
- Parent Account:** [None]
- Account Site:** Dan Barrett Test
- Parent Account:** [None]
- Account Record Type:** [None]
- Account Status:** [None]
- Website:** [None]
- Industry:** [None]
- Year Established:** [None]

The Channel Partner Details section shows the following information:

- Channel Partner:** [None]
- CP Account Manager:** [None]
- CP Internal Agent:** [None]
- Customer Link:** [None]
- Service Accounts:** [None]
- Created By:** Daniel Barrett, 10/06/2016 15:49
- Last Modified By:** Daniel Barrett, 2/06/2016 13:50

The Opportunities table shows the following data:

Action	Opportunity Name	Stage	MRR	Close Date	Partner Agent Login	Invoice URL	Owner Full Name	Primary Campaign Source Text
Edit	Dan Barrett Test, Barret	Reference Check - (Optional)		30/06/2016			Daniel Barrett	

The Contacts table shows the following data:

Action	Contact Name	Title	Email	Phone	Type	Contact Owner Alias	
Edit	Daniel Barrett	Primary Contact	Mr	daniel.barrett1@evanston.solutions.com	07912354169	Prospect	DBarr

Now the Account is created, from here you can update contact information and you can scroll down this page to create an opportunity under the account.

Opportunity Created

8x8, Inc.

Home Leads Accounts Contacts **Opportunities**

Opportunities List
New Opportunity

Opportunity Edit Save Save & New Cancel

Agent Portal Information (Auto populated)

Quoted In Agent Portal Order ID
Quoted In Agent Portal Date Stamp [23062016.1338] Order Status
Quote Expiration Date [23062016] Order Confirmed
Partner Agent Login Order Confirmed Date [23062016.1338]
CRM PRM Account ID Order Validated By
Classified Order Order Validated Date [23062016.1338]
Order Cancellation Date/Time Closed Won Confirmed By AP
Number of Lines Bucket Closed Won Confirmed Date [23062016.1338]
Invoice URL

Opportunity Details

Opportunity Owner Daniel Barrett Opportunity Currency GBP - British Pound
Opportunity Name Opportunity Record Type Mid Market
Account Name Dan Barrett Text Stage
Type New Business
Stage Note
Forecast Category Pipeline
Close Date [23062016] Close Date
Next Step Next Step Due Date [23062016]
Lead In Lead In
Other Competitor
Reason Lost Reason Lost
Reason - Nonfure - Contacted Reason - Nonfure - Contacted
Other Reason

Mid Market Channel Partner Details

Channel Partner Channel Partner 2
CP Account Manager CP Account Manager 2
CP Internal Agent CP Internal Agent 2

General Qualification

Primary Interest
Service Interest
Available
VCC - Virtual Office
VCC - Virtual Contact Center
Training
Unified Communications
Virtual Meeting
Chosen

Required Information

Populate required fields

** Important to populate the Product fields to let 8x8 know what you are going to quote/need resources for*

Sales Stage Categories

Stage	Forecast Category	Percentage	Prerequisites
Discovery-Ch	Omitted	0%	Lead
Qualified-Ch	Pipeline	5%	Gross Feature compatibility, Rough timeframe for close
Live Demo Complete-Ch	Pipeline	5%	Decision Makers ID'd, Rough timeframe for close
Price Quote-Ch	Best Case	25%	Competition, Urgency, Budget, Coach Sold, Feature Advantage/Meet Requirements, SE Analysis, Contract ended or ending with current provider, Close Date Target known, Partner has chosen us to win, "In-ballpark" response to quote
Ts&Cs Negotiation-Ch	Commit	90%	Offer match/advantage
Verbal Select-Ch	Commit	90%	Procurement cycle started, User Buyer sold, Economic buyer sold, Credit App, Close date in current quarter
Reference Check	Commit	90%	Close confidence, Partner Confidence, User Buyer sold

Must choose when creating an opportunity: Mandatory field!!!

Opportunity Details

The screenshot shows the 8x8 CRM interface for an opportunity. The top navigation bar includes 'Home', 'Leads', 'Accounts', 'Contacts', and 'Opportunities'. The main header displays the opportunity name 'Dan Barrett Test: Olivertest' and a 'Private View' indicator. Below the header is a social feed area with a 'Post' button and a 'Follow' button. A notification bar states 'Opportunity has been saved.' Below this is a breadcrumb trail: 'Orders (0) > Orders (0) > Contact Rules (0) > Open Activities (0) > Activity History (0) > Products (MPCLESALIDEMO) > Search Docs, Notes, & Attachments (0) > Stage History (0) > Opportunity Field History (0) > Opportunity Tools (0) > Operations Tables (0)'. The main content area is titled 'Opportunity Detail' and includes a sub-section 'Agent Portal Information (Auto populated)'. This section contains various fields such as 'Opportunity Owner' (Dan Barrett), 'Opportunity Name' (Dan Barrett Test: Olivertest), 'Account Name' (Dan Barrett Test), 'Type' (New Business), 'Product (Forward) Revenue' (0.00), 'Uplifted Services' (None), 'Subsidiary' (GBP 0.00), 'Probability (%)' (100%), 'Website', 'Timezone', and 'E-Rate'. To the right of these fields is a 'Mid Market Channel Partner Details' section with fields for 'Channel Partner', 'CP Account Manager', 'CP Internal Agent', 'Channel Partner 2', 'CP Account Manager 2', and 'Channel Account Manager'. Below this is a 'General Qualification' section with fields for 'Primary Interest', 'Service Interest', and 'Other services they can sell'. A 'Set Preferences' section is also visible on the left side of the main content area.

Now the opportunity is created, scroll down this page to create an Quote under the opportunity.



Opportunities

Contacts **Opportunities**

Opportunities Home

View: Opportunities not called in 30+ days

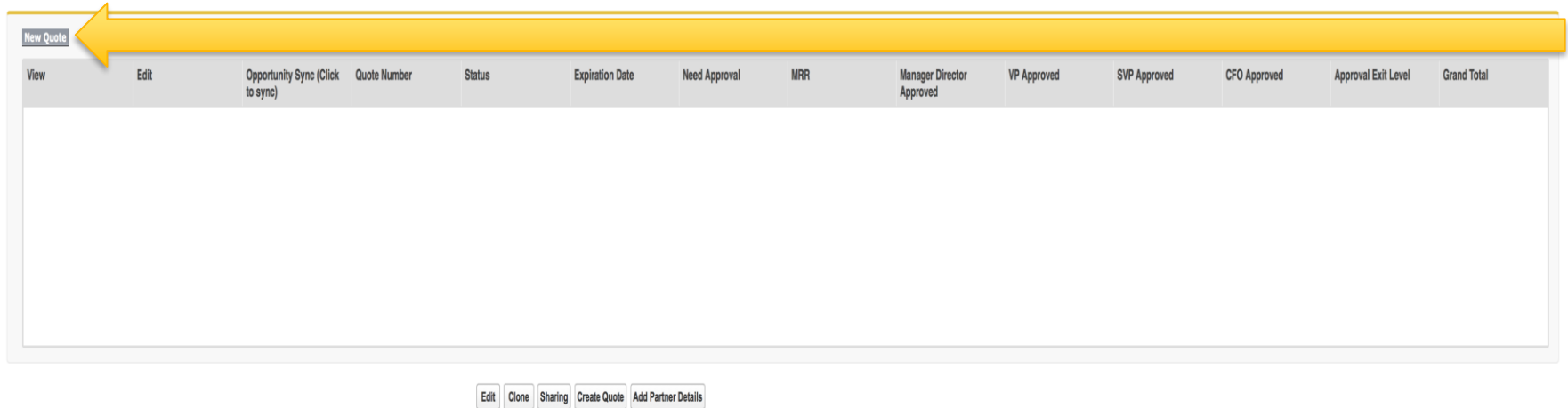
Recent Opportunities

Opportunity Name	Opportunity Record Type	Account Name	Close Date	Stage	MRR	Owner Full Name
Partner Training-	Mid Market	Partner Training	6/30/2016	Sales Assigned Lead		Vasudevan_Sathya
12ret-	Mid Market	12ret	5/13/2016	Order Placed/Closed Won	GBP 12.50	Vasudevan_Sathya
testLead99912-	Mid Market	testLead99912	5/13/2016	Order Placed/Closed Won	GBP 12.50	Vasudevan_Sathya
sathya99-	Mid Market	sathya99	3/31/2016	Sales Assigned Lead		Vasudevan_Sathya

Tip: You can access the quotes section at any time by clicking on the opportunities tab and selecting from the list below.

Start Partner Quote from Opportunity

Quotes



The screenshot shows a web interface for managing quotes. At the top left, there is a 'New Quote' button highlighted by a yellow arrow. Below this is a table with the following columns: View, Edit, Opportunity Sync (Click to sync), Quote Number, Status, Expiration Date, Need Approval, MRR, Manager Director Approved, VP Approved, SVP Approved, CFO Approved, Approval Exit Level, and Grand Total. The table body is currently empty. Below the table, there are five buttons: Edit, Clone, Sharing, Create Quote, and Add Partner Details.

Click the “New quote” button.

Quote page

The screenshot shows the QuoteBuilder interface for a new quote. The main title is "New Quote for Dan Barrett Test: Olivertest". The date is "23 June, 2016" and the partner is "WHOLESALEDEMO" from the "GBR" region. The interface includes a "Quote Approval Notes" section with a "60 months term" dropdown. Below this is a "Location 1" section with a "No Address" warning and an "Add a Service Plan to Location 1" button. A table lists services with columns for Qty, LIST, Price, MRR Discount, MRR, One-Time Discount, and UP FRONT. The table shows "Location Subtotals" and "Taxes and Fees" with values of £0.00. The "Location Totals" are also £0.00. On the right, an "Overview" section shows "Total Monthly Discounts: £0.00", "Total One-Time Taxes & Fees: £0.00", and "Project Level Discount (0%): £0.00". A "Total Monthly:" field shows £0.00. A "Promo code..." field with an "Apply" button is at the bottom right. Four yellow arrows point to: 1) the quote title, 2) the term dropdown, 3) the location address warning, and 4) the "Add a Service Plan to Location 1" button.

- New quotes:
- Name the quote
- Select Term
- Edit Address
- Add Services

TIP: Adding services and editing location information is the same as it was on agent portal

Contact and Address Info

Location Info ✕

Select Existing Contact

Contact Name * Daniel * Barrett

Voicemail Timezone EUROPE/LONDON

Phone number 01234 567 890

Email address * dbarrett@barrett.com

Verified Service Address:

Dan Barrett Test: Olivertest
8X8

AYLESBURY, BUCKS HP19 8JR
GBR

[Edit](#) | [Remove](#)

Ship To Different Address

Complete the required fields and validate address look up

Partner quote adding services

Add a Service Plan ×

Search by name...

Vcc Business Accessories Common Services Training Deployment Services

Numbers And Rate Plans

Main Mrr Items	VCC Express Seat Includes Voice, Agent-to-Agent Chat and Historical Reporting API's. Must subscribe to a least 3 seats up a maximum of 10 seats.	£39.00 /mo.	Next Step
Recordings Retention Items	VCC Seat Includes Voice, full Chat, Web Callback, 1 Web Wallboard and access to all API's	£45.00 /mo.	Next Step
One-Time Services	VCC Pro Seat Includes Voice, full Chat, Web Callback, 2 Web Wallboards, access to all API's, email, Local CRM, eIVR, 5 Pre-Packaged Integrations	£50.00 /mo.	Next Step
Teleopti Workforce Management	VCC Premier Seat Includes Voice, full Chat, Web Callback, 3 Web Wallboards, access to all API's, email, Local CRM, eIVR, 5 Pre-Packaged Integrations, Dialer and Collaborate.	£57.60 /mo.	Next Step
Speech Recognition Add-Ons	VCC Additional Named User Provides unique user identity for reporting with roles and permissions. It is for tracking user status, interactions & performance without adding additional concurrent agent capacity. It is useful for multiple shift staffing.	£5.00 /mo.	Next Step
Harmony Quality Management	Extra Voice Port Provides additional voice processing channels (ports). Note: Port capacity is included with each Concurrent Access user.	£9.00 /mo.	Next Step

Create a quote for;

20 x VO seats

4 x VO Pro Seats

2 x Virtual Numbers

1 x Ring group

Pricing and other changes

Edit Quote for TrainingTest2: Opportunity3


Quote Number: CQ00197847

July 18, 2016
Partner : telcombrokers
Region : USA

Discount Approval Level

	Agent	Manager/Director	VP	SVP	CFO
Unlimited Extension - MRR	\$21.99	\$16.99	\$15.99	\$13.99	\$0.00
Unlimited Extension - Upfront	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Polycom VVX 300	\$3.93	\$3.93	\$3.93	\$3.93	\$2.93
Unlimited Extension - Activation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Expires: 7/31/2016

	LIST	Price	MRR Discount	MRR	One-Time Discount	Up Front	
 20 Unlimited Extension		\$39.99	22	\$359.80	\$440.00	\$359.80	\$440.00
with Polycom VVX 300		\$136.99	136.99				\$2,739.80
One-Time Activation		\$39.99	39.99				\$799.80
with Virtual Office Mobile		FREE	FREE				FREE

Change pricing by clicking in price box and using arrows or typing new price over.

Approval levels are listed by hovering over product name

Colors of price change based on approval needed

Quote

QuoteBuilder Quote - View Bill

New Quote for Dan Barrett Test: Olivertest

83-Arma 8018 Partner - WIND GLOBAL SERVICES
Region - GBR

Quote Approved Status

60 Months term Contract End date: Contract Term: 3 Months VCC Site: None Expires: 30/4/2016

Location 1 --- 888_ARLESBURY BLACKS HP19 RFR GBR

Qty	Item	LIST	Price	MRR Discount	MRR	One-Time Discount	UP FRONT
2	Virtual Number - Calling Plan Type: VO	£3.00	3		£3.00		£3.00
	One-Time Activation	£3.00	0				£3.00
2	International Virtual Number - Calling Plan Type: VO	£5.00	6		£12.00		£12.00
	One-Time Activation	£5.00	5				£10.00
4	Virtual Office Professional One - with Polycom VXX 650	£12.50	12.5		£50.00		£50.00
	with Polycom VXX 650	£153.41	153.41				£37.64
	One-Time Activation	£10.00	10				£40.00
	with Virtual Office Pro Add On	FREE	FREE		FREE		
20	Virtual Office One - with Polycom VXX 410	£8.00	8		£160.00		£160.00
	with Polycom VXX 410	£98.13	98.13				£1,962.60
	One-Time Activation	£10.00	10				£200.00
	with Virtual Office Mobile	FREE	FREE		FREE		
1	Switchboard Pro -	£8.00	8		£8.00		£8.00
	One-Time Activation	£3.00	3				£3.00
1	Additional Ring Groups - 1 -	£1.80	1.8		£1.80		£1.80
1	Call Queuing -	£4.50	4.5		£4.50		£4.50
	One-Time Activation	£3.00	3				£3.00
24	Virtual Office Analytics -	£1.75	1.75		£42.00		£42.00
	One-Time Activation	£3.00	3				£3.00
		Location Subtotal:			£278.30		£3,134.54
		Taxes and Fees:			£3.00		£3.00
		Location Total:			£278.30		£3,134.54
		Shipping:					0

Overview

Total Monthly Discounts:	£3.00
Total One-Time Discounts:	£3.00
Total Shipping:	£3.00
Total One-Time Taxes & Fees:	£3.00
Total MRR Taxes & Fees:	£3.00
Project Level Discount (PLD):	£3.00
Total Due Today:	£3,134.54
Total Monthly:	£278.30

Calculation Summary

Apply

+ Add & Service Plan to Location 1 Template

+ Add New Location

This is a Demo Quote

Calculate Shipping charges and taxes

The screenshot shows a software interface with a pricing table and an 'Overview' sidebar. A modal dialog box is open in the center, displaying a gear icon, the text 'Please Wait...', a progress bar, and the message 'Calculating taxes for Location 1.' with a 'Cancel' button. The background table lists items with their prices and quantities. The 'Overview' sidebar shows a summary of costs, including 'Total Monthly Discounts', 'Total One-Time Discounts', 'Total Shipping', 'Total One-Time Taxes & Fees', 'Total MRR Taxes & Fees', 'Project Level Discount (0%)', 'Total Due Today', and 'Total Monthly'.

Item	Price	Quantity	Total Price
Virtual Office One	£8.00	8	£8.00
with Polycom IP 5000 Speakerphone	£217.24		£217.24
One-Time Activation	£10.00	10	£10.00
with Virtual Office Mobile			
Location Totals:	£20.50		£757.49

Shipping: 8

Calculate Charges

Important to do this or quote will error out when saved

Location Subtotals:	£278.30	£3,134.54
Value Added Tax	£55.66	£646.11
Taxes and Fees: (Hide Details)	£55.66	£646.11
Location Totals:	£333.96	£3,876.65
Shipping: ▾		96

Discounting Fees and First Month

The screenshot shows the QuoteBuilder interface. At the top, there is a 'Quote' dropdown menu and a 'View Bill' button. Below this, a dropdown menu is open, listing several actions: 'Save Quote...', 'Process Quote...', 'Remove Agent Discounts', 'Fees Discount...', 'Discount First Month', and 'Update DALs'. Two large yellow arrows point to the 'Fees Discount...' and 'Discount First Month' options. The main content area shows a 'New Quote' for 'Test2-Opp3'. It includes fields for 'Test Quote 1', 'Quote Approval No', '12 months term', 'Contract End date: Contract Term: 0 Months', 'VCC Site: None', and 'Expires:'. Below this, the location is 'Location 1 — 2125 ONEL DR, SAN JOSE CA 95131 USA'. A table lists items with columns for Qty, LIST, Price, MRR Discount, and MRR. The items are: 'Unlimited Extension' (Qty: 10, LIST: \$39.99, Price: 22, MRR Discount: \$179.90, MRR: \$220.00), 'with Polycom VVX 500' (LIST: \$291.99, Price: 291.99), 'One-Time Activation' (LIST: \$39.99, Price: 39.99), and 'with Virtual Office Mobile' (LIST: FREE, Price: FREE, MRR: FREE). A '+Add Note' link is at the bottom.

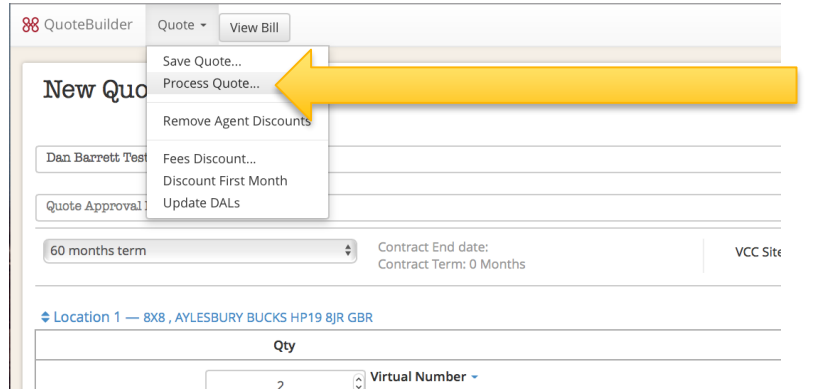
Click “Quote” button at top to:

Discount E911 and RRF fees by clicking Fees Discount

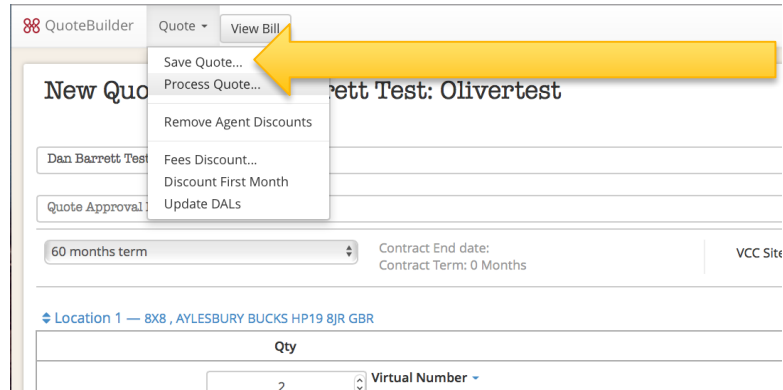
Discount First Month if needed for competitive reasons

Process or Save Quote

Once you are happy with the quote, you need to process the quote to create the order.



Or Save the quote instead to come back and finish it at a later date



Unlock or Send quote

8x8 QuoteBuilder

Unlock

Create Order

Clone Quote

Send PDF



If saved, Unlock to edit

If ready to send quote – Click Send PDF

Edit Quote for Partner Training-

Quote Number: CQ00176188

15 May, 2016

Partner : WHOLESALEDEMO

Region : GBR

Name this quote...

Quote Approval Notes

12 months term


Contract End date:
Contract Term: 12 months

VCC
Site:

None

Expires: 31/5/2016

Location 1 — ONEL, LONDON BERKS WC2H 7LE GBR

Qty	LIST	Price	MRR Discount	MRR	One-Time Discount	Up Front
 1	Virtual Office Professional One	£12.50	12.5	£12.50		£12.50
	with Polycom IP 7000 Speakerphone	£491.75	491.75			£491.75
	One-Time Activation	£10.00	10			£10.00
	with Virtual Office Pro Add-On	FREE	FREE	FREE		

Send email of Quote (Send PDF button)

Email Message
Send an Email

The screenshot shows an email composition interface. At the top, there are buttons for 'Send', 'Select Template', 'Attach File', and 'Cancel'. Below this is the 'Edit Email' section. The 'Email Format' is set to 'Text-Only [Switch to HTML]'. The 'From' field is 'Michelle Kaltenberg <michelle.kaltenberg@8x8.com>'. The 'To' field is 'Michelle Kaltenberg'. The 'Related To' field is 'Quote' with a dropdown arrow and 'Test Quote 1' next to it. The 'Additional To:' field is empty. The 'CC:' field is empty. The 'BCC:' field is 'michelle.kaltenberg@8x8.com'. The 'Subject' field is 'Quote #00198242 for your review'. The 'Body' field contains the text: '8x8 sent a Quote #00198242 for your Review. Please find the attached Quote. Regards, michelle.kaltenberg@8x8.com'. At the bottom of the email composition area, there are buttons for 'Send', 'Select Template', 'Attach File', and 'Cancel'. Below this is the 'Attachments' section, which has an 'Attach File' button. The attachments table shows one attachment: 'Del Quote_00198242.pdf' with a size of '1.28MB'.

Action	File	Size
Del	Quote_00198242.pdf	1.28MB

Important Note: before this screen pops up – a screen of the quote/collateral will pop first – it goes away by itself after 2 to 20 seconds. Do nothing during that time!!

Fill in information in this form to send quote to customer. Can add additional attachments at bottom. Click Send when ready


Edit Quote to Create Order

Quotes

New Quote

View	Edit	Opportunity Sync (Click to sync)	Quote Number	Status	Expiration Date	Need Approval	MRR
Test Quote 1	Edit	false	CQ00198242				

[Edit](#) [Clone](#) [Sharing](#)

 **Test Quote 1**

[« Back to TrainingTest2-Opp3](#)

Quote Detail

Quote Name	Test Quote 1
Opportunity Name	TrainingTest2-Opp3
eppMrr	USD 0.00
Quote Number	CQ00198242

[Edit Quote](#)

[Edit Quote](#)

When customer is ready to place order:
Find quote in Opportunity screen and click on quote number

Click Edit Quote

Create Order

8x8 QuoteBuilder

Unlock

Create Order

Clone Quote

Send PDF

Edit Quote for Partner Training-

Quote Number: CQ00176188

15 May, 2016

Partner : WHOLESALDEMO

Region : GBR

Name this quote...

Quote Approval Notes

12 months term


Contract End date:
Contract Term: 12 months

VCC
Site:

None

Expires: 31/5/2016

Location 1 — ONEL, LONDON BERKS WC2H 7LE GBR

Qty	LIST	Price	MRR Discount	MRR	One-Time Discount	Up Front
 1	Virtual Office Professional One	£12.50	12.5	£12.50		£12.50
	with Polycom IP 7000 Speakerphone	£491.75	491.75			£491.75
	One-Time Activation	£10.00	10			£10.00
	with Virtual Office Pro Add-On	FREE	FREE	FREE		

Click Create Order to start process

Order validations

8x8 OrderBuilder Save Calculate Taxes Place Order Void Order Clone Order Order Status Co-Browse Back to Account Help

Dan Barrett Test Order #C00300088543 23 June 2016

PBX Name	Email	Confirm Email	Login	Validate User	Passphrase
Dan Barrett Test	dbarrett@barrett.com	dbarrett@barrett.com	dbarrett	<input type="button" value="Validate User"/>	dbarrett

Order Information

Order Details	Contract Details	Bill To
Quote # CQ00190688 Contract Term <input type="checkbox"/> 60 months term <input checked="" type="checkbox"/> Customer Accepted: <input type="checkbox"/> Project Level Discount (0.00 %): 0.00 Total Due Today: 3230.54 Order Type: New Business Order Status: Draft Order Error: Future Order Date: <input type="text"/> Remove Future Date Order Expiry Date : <input type="text" value="08/07/2016"/> Order PDF URL : Agent ID : Daniel Barrett -- DBARRETT123	Contract Number: 00044921 Start Date : 23/06/2016 End date : 22/06/2021	Dan Barrett Test

Populate the top fields and validate user login

Dan Barrett Test Order #C00300088543

23 June 2016

Customer Information

PBX Name	Email	Confirm Email	Login	Validate User	Passphrase
Dan Barrett Test	dbarrett@barrett.com	dbarrett@barrett.com	dbarrett	<input type="button" value="Validate User"/> Available	dbarrett

Configure Phone Numbers

OrderBuilder Save Calculate Taxes Place Order Void Order Clone Order Order Status Co-Browse Back to Account Help

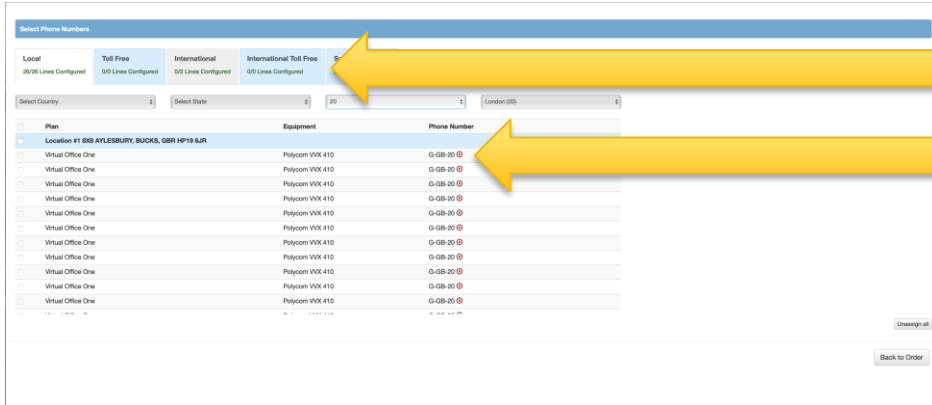
Contact First Name : Luanie Contact Last Name : lbarrett
Contact Email : dbarrett@barrett.com Contact Phone : 01234 567 890
Deployment Go Live Date:

Qty	LIST	Price	One-Time Discount	Up Front	MRR Discount	MRR
2	Virtual Number <small>Calling Plan Type: VO Configure Phone</small>	£ 0.00	£ 0.00	£ 0.00		£ 0.00
	Activation Charges	£ 0.00	£ 0.00	£ 0.00		
2	International Virtual N <small>Calling Plan Type: VO Configure Phone</small>	£ 5.00	£ 5.00	£ 10.00		
	Activation Charges	£ 5.00	£ 5.00	£ 10.00		
4	Virtual Office Professional One <small>Configure Phone</small>	£ 12.50	£ 12.50	£ 50.00		£ 50.00
	Activation Charges	£ 10.00	£ 10.00	£ 40.00		
	Polycom VVX 600	£ 159.41	£ 159.41	£ 637.64		£ 0.00
	Virtual Office Pro Add-On	£ 0.00	£ 0.00	£ 0.00		£ 0.00
20	Virtual Office One <small>Configure Phone</small>	£ 8.00	£ 8.00	£ 160.00		£ 160.00
	Activation Charges	£ 10.00	£ 10.00	£ 200.00		
	Polycom VVX 410	£ 98.13	£ 98.13	£ 1,962.60		£ 0.00
	Virtual Office Mobile	£ 0.00	£ 0.00	£ 0.00		£ 0.00
1	Switchboard Pro	£ 8.00	£ 8.00	£ 8.00		£ 8.00
	Activation Charges	£ 3.00	£ 3.00	£ 3.00		
1	Additional Ring Groups - 1	£ 1.80	£ 1.80	£ 1.80		£ 1.80
1	Call Queuing	£ 4.50	£ 4.50	£ 4.50		£ 4.50
	Activation Charges	£ 3.00	£ 3.00	£ 3.00		
24	Virtual Office Analytics	£ 1.75	£ 1.75	£ 42.00		£ 42.00
	Activation Charges	£ 0.00	£ 0.00	£ 0.00		
Location Subtotals:				3,134.54		278.30
Taxes and Fees:						
Shipping: Standard				£ 96.00		
Location Totals:				£ 3,230.54		£ 278.30

But wait....

We havent configured the phone numbers.
Click on configure phone to select the numbers.

Configure Phone Numbers



Along the top you can see different tabs for different number natures.

We can see with have both local and international numbers to assign.

The screenshot shows the 'OrderBuilder' interface with a summary table. The table has columns for item name, quantity, unit price, and total price. The items listed are 'Virtual Office Professional One' and 'Virtual Office One', both with a quantity of 4. The table also shows activation charges and equipment costs.

Item	Quantity	Unit Price	Total Price
Virtual Office Professional One	4	£12.50	£50.00
Virtual Office One	20	£9.00	£180.00
Activation Charges		£10.00	£10.00
Equipment		£198.13	£3,962.60

Payment

Payment Information

Add New Payment



Click add new payment, select invoice and save.

Payment Options: None

Payment Information ×

Payment Option: Invoice

Billing address same as Shipping

Country: UNITED KINGDOM

First Name: Daniel Last Name: Barrett

Address 1: 8X8

Address 2:

Town: AYLESBURY County: Choose State

Postal code: HP19 8JR Phone: 01234 567 890

Save Close

Payment Information

Add New Payment

Payment Options: Invoice

First Name:	Daniel	Last Name:	Barrett
Address 1:	8X8	Address 2:	
Postal Code:	HP19 8JR	Town:	AYLESBURY
Phone:	01234 567 890	Country:	BUCKINGHAMSHIRE
Country:	UNITED KINGDOM		

Place the order, send documents to sign



Order : CO0300088543
Period: 60 months term
End date: 2026/00/01

Thank you for the opportunity to earn your business.
8x8 UK now offers Polycom VVX video phones for point to point video calls when used on 8x8 Virtual Office service.

Customer Details					
Date	Sales Agent	Bill To			
23 June, 2016	Daniel Barnett	Dan Barnett Test DanielBarnett 8x8 AYLESBURY, BUCKS HP19 8JR GBR			

Order Summary					
Location	Subtotal	Shipping	Taxes	Current	Charge
#1 Service At : 8x8 AYLESBURY, BUCKS, GBR HP19 8JR Ship To : Same as Service address	£ 3,134.54	£ 96.00	£ 648.11	£ 3,878.65	
Total	£ 3,134.54	£ 96.00	£ 648.11	£ 3,878.65	

Order Details					
Location 1 : 8x8 AYLESBURY, BUCKS, GBR HP19 8JR					
Contact Name : Daniel Barnett	Email : dbarnett@barnett.com	Phone : 01234 567 890			
Items	Qty	Unit Price	Current	Recurring	
Virtual Number Calling Plan Type: VO	2	£ 0.00	£ 0.00	£ 0.00	
Activation Charges	2	£ 0.00	£ 0.00		
International Virtual Number Calling Plan Type: VO	2	£ 6.00	£ 12.00	£ 12.00	
Activation Charges	2	£ 5.00	£ 10.00		
Virtual Office Professional One	4	£ 12.50	£ 50.00	£ 50.00	
Activation Charges	4	£ 10.00	£ 40.00		
Polycom VVX 600	4	£ 169.41	£ 677.64		
Virtual Office Pro Add-On	4	£ 0.00	£ 0.00	£ 0.00	
Virtual Office One	20	£ 8.00	£ 160.00	£ 160.00	

This screen to the left will appear if first if order is processed. After 2-10 seconds it will disappear and this screen below will appear. Click “Send Now” in bottom right corner to send order to customer

Order:

Documents Add Document

Order	Name	Action	Role
1	Order#CO0300093269.pdf 21KB		

Recipients Add Recipient

Order	Recipient	Action	Role
1	michelle@mnskatt.com michelle@mnskatt.com	Signer	Signer 1

Message to All Recipients

Subject: 8x8 order for your review and confirmation

Message: 8x8 has sent an Order : CO0300093269. Please review

Cancel Send Now



Confirm order status

OrderBuilder Re-Send Order PDF Void Order Clone Order Order Status

TrainingTest2 Order #C00300093269

Customer Information

PBX Name	Email	Confirm Email
TrainingTest2	michelle@mrkalt.com	michelle@mrkalt.com

Order Information

Order Details	
Quote #	CQ00198242
Contract Term	12 months term
Customer Accepted:	<input type="checkbox"/>
Project Level Discount (0.00 %):	0.00
Total Due Today:	3964.45
Order Type:	New Business
Order Status:	Pending Acceptance
Order Error:	



Click "Order Status"



Order Status

▼ Order Status in SFDC

Order Status
Pending Acceptance

▼ Order Status in CRM

Value	Status
CRM Order Status	

Refresh

Customer receives the order for confirmation



Sathya Vasudevan via DocuSign <dse_na2@docusign.net>
to me ▾

9:25 PM (0 minutes ago)



8x8 UK has sent an Order : CO0300079595. Please review.

[Click to Review](#)

Sathya Vasudevan
sathya.vasudevan@8x8.com

Customer reviews order

Please Review & Act on These Documents



Sathya Vasudevan
8x8, Inc.



Powered by DocuSign

8x8 UK has sent an Order : CO0300079595. Please review

Please review the documents below.

CONTINUE

OTHER ACTIONS ▾

DocuSign Envelope ID: 0F11593F-AA4A-4A9B-AA6A-8626F8220427



Order : CO0300079595
Period : 12 months term
End date:14/05/2017

Thank you for the opportunity to earn your business.

8x8 UK now offers Polycom VVX video phones for point to point video calls when used on 8x8 Virtual Office service.

Customer Details

Date	Sales Agent	Bill To
16 May, 2016	Sathya Vasudevan	Partner Training PartnerTraining ONel LONDON, BERKS WC2H 7LE GBR




Customer agrees T&C and Confirms order

DocuSign Envelope ID: 0F11593F-AA4A-4A9B-AA6A-8626F8220427

Sx8 Terms and Conditions - <https://www.8x8.co.uk/about-us/terms-and-conditions>

I agree to the above mentioned my 8x8 UK Service.

Signature : 
CCD68E078E7B4D6

Name : sathya

Title : Test

Date : 5/15/2016

Done! Click Finish to send the completed document. **FINISH**

Order pending customer acceptance

Partner Training Order #C00300079595

15 May 201

Customer Information


PBX Name	Email	Confirm Email	Login	Passphrase
Partner Training	sathya.vasudevan@8x8.com	sathya.vasudevan@8x8.com	partner_sathya	welcome123

Order Information

Order Details	Contract Details	Bill To
Quote # CQ00176122	Contract Number: 00042512	Partner Training
Contract Term <input type="text" value="12 months term"/>	Start Date : 15/05/2016	ONel
Customer Accepted: <input type="checkbox"/>	End date : 14/05/2017	LONDON, BERKS WC2H 7LE
Project Level Discount (0.00 %): 0.00		
Total Due Today: 1530.89		
Order Type: New Business		
Order Status: Pending Acceptance		
Order Error:		
Future Order Date:		
Order Expiry Date : 30/05/2016		
Order PDF URL : View PDF		
Agent ID : <input type="text" value="WHOLESALEDEMO"/>		



Partner receives signed document as PDF

 **DocuSign via DocuSign** <dse_na2@docusign.net> 9:27 PM (0 minutes ago)   

to me 





Your Order has been confirmed. For Order Details please review the attachment.



Customer accepted email

Customer Accepted. Order Number : CO0300079595



Inbox x



Do Not Reply via 0ntz5wwctsso.3-6mvteae.na3.bnc.salesforce.com

9:28 PM (9 minutes ago)



to me, madhu.chalasanani, me

Congratulations!

Your Order Number: **CO0300079595** has been accepted by the customer.

Opportunity Name: **Partner Training-**

Salesforce ID: **8015000000nFjIAAU**

For more details on the Order, please click here: <https://8x8.force.com/8015000000nFjIAAU>



Order completed

Partner Training Order #C00300079595

15 May 2016

Customer Information

PBX Name	Email	Co
Partner Training	sathya.vasudevan@8x8.com	sa

Order Information

Order Details	
Quote #	CQ00176122
Contract Term	12 months term
Customer Accepted:	<input checked="" type="checkbox"/>
Project Level Discount (0.00 %):	0.00
Total Due Today:	1530.89
Order Type:	New Business
Order Status:	Completed in SFDC
Order Error:	
Future Order Date:	
Order Expiry Date :	30/05/2016
Order PDF URL :	View PDF
Agent ID :	WHOLESALEDEMO...WHOLE

Order Status

Order Status in SFDC

Order Status
Completed in SFDC

Order Status in CRM

Value	Status
CRM Order Status	Order Load Failed

Refresh

1. Order completed in SFDC
2. If multi location order - CRM Status will show-
“Order Load failed”
3. As it provisions – this will clear

3. Additional Orders Sample

And then some...

Create New Opportunity - Add on Quote

▼ Agent Portal Information (Auto populated)

Partner Role	Order Number	0300079417
Quoted in Agent Portal <input type="checkbox"/>	CRM Order Number	AO0300079417
Quoted in Agent Portal Date Stamp	Order ID	8015000000nF0hAAE
Partner Agent Login	Order Status	Pending Acceptance
CRM PBX Account ID	Order Confirmed <input type="checkbox"/>	
Partner / Affiliate	Order Confirmed Date	
IsDemo <input type="checkbox"/>	Order Voided By	
IsMigration <input type="checkbox"/>	Order Voided Date	
Quote Number	Closed Won Confirmed by AP <input type="checkbox"/>	
Quote Status	Closed Won Confirm Date	
Quote Expiration Date	Invoice URL	
Number of Quotes	Sys Admin Notes	

▼ Opportunity Details

Opportunity Owner	Mattics Phj [Change]	Opportunity Record Type	Mid Market [Change]
Opportunity Name	qamatticstestingfields: demo	New Logo	0
Account Name	qamatticstestingfields: demo	Stage	Qualified
Type	Add-On Business	Stage Note	
Order Type	Sales	Forecast Category	Pipeline
Booking Order		Close Date	5/13/2016

Make sure type is “Add-On Business”

Click “Add On” to start



Quotes

Add On						
View	Edit	Opportunity Sync (Click to sync)	Quote Number	Status	Expirati	

Add on Quote

New Quote for qamatticstestingfields: demo May 13, 2016
Partner :
Region : USA

PEX -
Name this quote...

Quote Approval Notes

Contract End date: 10/22/2017 VCC Site: Expires: 5/31/2016

Location 1 ⚠ No Address Edit

Qty	LIST	Price	UP FRONT
+ Add a Service Plan to Location 1 Templates			
Location Subtotals:			\$0.00
Taxes and Fees:			\$0.00
Location Totals:			\$0.00

Deployment Details

Ship Date:

Billing Start Date:

⚙ Please Wait...

Retrieving customer PBX information...

Overview

Total Monthly Disc...

Total One-Time Disc...

Total Shipping:

Total One-Time Tax...

Total MRR Taxes & F...

Project Level Discou...

Total Due Today

Total Monthly:

Promo code...

Commission

(prior to accelerators)

MRR:

Up Front:

Product:

Retrieve the PBX Info

Select the PBX name

QuoteBuilder Quote View Bill

New Quote for qamatticstestingf

PBX: -

Name this quote...

Quote Approval Notes

Contract End date: 10/2/2017
Contract Term: 24 Months

VCC Site: None

Location 1 — No Address

Qty LIST

+ Add a Service Plan to Location 1 Templates

Locat

Select Customer PBX

New PBX

Company Name	Account Id	PBX Name	PBX Type	
qamatticstestingfields	P8B000003351420	xxxxxx58	VO/VCC	Select this PBX
qamatticstestingfields	P8B000003655403	xxxxxx71	VO/VCC	Select this PBX
qamatticstestingfields	P8B000003655442	xxxxxx72	VO/VCC	Select this PBX
qamatticstestingfields	P8S000003687604		SIP	Select this PBX
SIPtrunkingoverage	P8B000004471082	siptrunkingoverag2	VO/VCC	Select this PBX
SIPtrunkingoverage	P8B000004470967	siptrunkingoverag1	VO/VCC	Select this PBX
qamatticstestingfields	P8B000003497124	xxxxxx63	VO/VCC	Select this PBX
qamatticstestingfields	P8B000003493287		VO/VCC	Select this PBX
qamatticstestingfields	P8B000003495486	xxxxxx62	VO/VCC	Select this PBX

Choose existing PBX
and add services

Add new PBX
on same
account

Choose the address

New Quote for qamatticstestingf

PBX: xxxxxx58 - P8B000003351420

Name this quote...

Quote Approval Notes

Contract End date: 10/2/2017
Contract Term: 24 Months

VCC Site: None

Location 1 — No Address

Qty	LIST
+ Add a Service Plan to Location 1	
Templates	

Select Customer Address

+ Add New Address...

Street Number	Street Name	Sec. Address	City	State	Zip Code	
2125	ONEL		SAN JOSE	CA	95131 2032	Select
2125	ONEL		SAN JOSE	CA	95131 2032	Select
2125	ONEL		SAN JOSE	CA	95131 2032	Select
2125	ONEL		SAN JOSE	CA	95131 2032	Select
2125	ONEL		SAN JOSE	CA	95131 2032	Select
2125	ONEL		SAN JOSE	CA	95131 2032	Select
2113	ONEL		SAN JOSE	CA	95131	Select
2113	ONEL		SAN JOSE	CA	95131	Select
2125	ONEL		SAN JOSE	CA	95131 2032	Select
2125	ONEL		SAN JOSE	CA	95131 2032	Select

Choose existing address

Add new address

Add On quote page

Edit Quote for gamatticstestingfields: demo

May 15, 2016

Quote Number: AQ00176011
PBX: xxxxxx58 - P8B000003351420

Partner : ENTR
Region : USA

Name this quote...
Quote Approval Notes


Contract End date: 10/2/2017
Contract Term: 24 months

VCC Site:

Expires:

Location 1 — 2125 ONEL DR , SAN JOSE CA 95131 USA

Edit

Qty	LIST	Price	MRR Discount	MRR	One-Time Discount	Up Front
 1	Unlimited Extension	\$39.99		\$39.99		\$39.99
	with Polycom IP 6000 S					\$729.99
	One-Time Activation					\$39.99
	with Virtual Office Mobi			FREE		
+Add Note						
+ Add a Service Plan to Location 1 Templates						

- Add VO PRO
- Add SRTP
- Add Salesforce
- Add BARGE
- Discount First Month...
- Change Service...
- Change Equipment...

Overview

Total Monthly Discounts:	\$0.00
Total One-Time Discounts:	\$0.00
Total Shipping:	\$0.00
Total One-Time Taxes & Fees:	\$0.00
Total MRR Taxes & Fees:	\$0.00
Project Level Discount (0%):	\$0.00
Total Due Today:	\$809.97
Total Monthly:	\$39.99

[Calculate Charges](#)

Promo code... [Apply](#)

Process add on quote

QuoteBuilder Quote

Edit Quote for qamattic

Quote Number: AQ00176011
PBX: xxxxxx58 - P8B0000033514R0

Name this quote...

Quote Approval Notes

Contract End date: 10/2/2017
Contract Term: 24 months

VCC Site: None

Expires: 5/31/2016

Location 1 — 2125 ONEL DR , SAN JOSE CA 95131 USA

Qty	LIST	Price	MRR Discount	MRR	One-Time Discount	Up Front
1	Unlimited Extension	\$39.99		39.99	\$39.99	\$39.99
	with Polycom IP 6000 Speakerphone	\$729.99		729.99		\$729.99
	One-Time Activation	\$39.99		39.99		\$39.99

Error - The validation popup to indicate the agent of any missing dependency

Add on order page

qamatticstestingfields Order #A00300079417

May 13, 2016

Customer Information

PBX Name	Email	Confirm Email	Login
xxxxxx58	reyna.arzola@8x8.com [Gmail]	reyna.arzola@8x8.com [Gmail]	TESTINGFIELDSQA

Order Information

Order Details	Contract Details	Bill To
Quote # Contract Term Customer Accepted: Project Level Discount (0.00 %): 0.00 Total Due Today: Order Type: Order Status: Order Error: Future Order Date: Order Expiry Date : Order PDF URL : Agent ID :	AQ00175826 24 months term <input type="checkbox"/> Add-On Business Pending Acceptance 5/27/2016 View PDF Team VCC -- MPHI	Contract Number: 00005867 Start Date : 07/01/2015 End date : 06/30/2017 qamatticstestingfields 2125 onel dr san jose, CA 95131

Schedule Billing Required?

1. Most of the fields will auto populate from SFDC since its an existing customer order
2. "Pending Acceptance" - Order is pending customer signature



Completed Add on Order

gamatticstestingfields Order #A00300079417 May 13, 2016

Customer Information

PBX Name	Email
xxxxxx58	reyna.arzola@8x8.com [Gma

Order Information

Order Details

Quote #	AQ00175826
Contract Term	24 months term
Customer Accepted:	<input type="checkbox"/>
Project Level Discount (0.00 %):	0.00
Total Due Today:	25.00
Order Type:	Add-On Business
Order Status:	Completed in SFDC
Order Error:	
Future Order Date:	
Order Expiry Date :	5/27/2016
Order PDF URL :	View PDF
Agent ID :	Team VCC -- MPHI

https://c.na3.visual.force.com/apex/SA8x8_OrderStatus?oId=8015000000nF0hAAE - Goo...

https://c.na3.visual.force.com/apex/SA8x8_OrderStatus?oId=8015000000nF0h...

Order Status

▼ Order Status in SFDC

Order Status
Completed in SFDC

▼ Order Status in CRM

Value	Status
CRM Order Status	Hold


[Refresh](#)


Connect with 8x8


For tips, updates and the latest information

 8x8.com

 [@8x8](https://twitter.com/8x8)

 facebook.com/8x8

 linkedin.com/company/8x8

 youtube.com/8x8

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