



8x8 Switchboard Pro is a flexible and easy-to-use browser based application for 8x8 Virtual Office users. It offers better call management capabilities to front desk receptionists and improves caller experience.

LOG IN

1. In your preferred browser, go to <https://sso.8x8.com/login/switchboard>.

2. Enter your 8x8 username and password.
3. Click **Login** to launch Switchboard Pro.

Note: Internet Explorer is not supported.

Note: Switchboard Pro requires a Virtual Office extension with an 8x8 Polycom desk phone to answer calls. A softphone-only user must answer calls in an 8x8 Virtual Office client and then manage them in Switchboard Pro.

KNOW THE USER INTERFACE

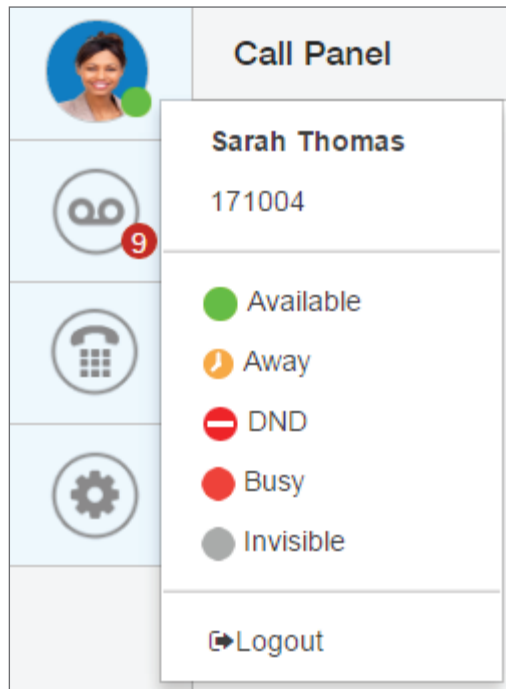
Status	First	Last	Department	Extn/Phone	Mobile	Branch	#
●	Dave	Provenza	Marketing	1020			A
●	David	Leach	Marketing	1018			B
●	Denise	Martin	Training	1028			C
●	Eleazar	Manalo	Customer Suc...	1026		San Jose	D
●	Erik	Smith	Marketing	1021			E
●	Gerry	Mao	Customer Suc...	1033			F
●	Hugh	Davie	Voicenet	1032			G
●	HUMAN RESO...			701			H
●	Janice	Lewis	Engineering	1040			I
●	Jean	Andje	Engineering	1007			J
●	Jeff	Woodside		1042			K
●	Joel	Sandi	Customer Suc...	1025		San Jose	L
●	John	Smith	Product Mana...	1003			M
●	Julia	Zhu	Customer Suc...	1013			N
●	Ken	Madland		1039			O
●	Lanore	Martinez	QA	1050		Santa Clara	Q

The Switchboard Pro interface is composed of two main sections:

- The Call Management Window contains information on active calls.
 - Status icon: Set your status, or log out.
 - Voicemail: Open the list of your received voicemails.
 - Dial pad: Dial numbers to call outside of your contact list.
 - Settings: Change your call settings.
- The Contact Directory Window contains a list of other contacts within your PBX.
 - Search contacts: Search for contacts based on name, department, extension, and more.
 - Customize display: Filter contacts based on branch, and select the desired information columns to show.

MANAGE YOUR PRESENCE

1. Click your status icon to open a drop-down menu of status options.








2. Select from the following options:

- **Available:** Ready to take calls
- **Away:** Will be available again soon
- **DND:** Do not disturb and forward calls to voicemail
- **Busy:** On a call or otherwise busy; calls still ring your extension
- **Invisible:** Online but not visible to others
- **Logout:** Log out of your session

RECEIVE CALLS

1. When you receive a call, the **Call Panel** area shows the incoming call.



2. Click  to accept the call.
3. After speaking with the caller, select one of the following options:
 -  : Place the call on hold
 -  : Park the call
 -  : Transfer the call
 -  : Retrieve a call parked or placed on hold

SEARCH FOR CONTACTS

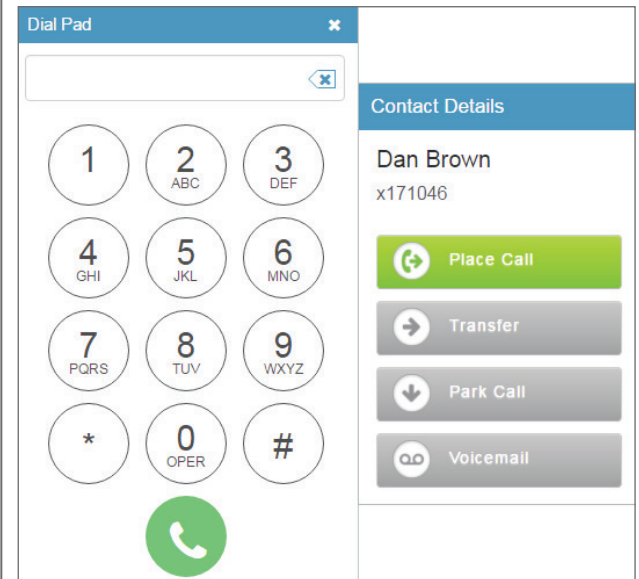
To search contacts, type a name, department, or other identifying information available in Switchboard Pro into the search bar. The search results filter as you type.

First	Last	Department	Extn/Phone	Mobile
Dave	Provenza	Marketing	171020	
David	Leach	Marketing	171018	
Hugh	Davie	Voicenet	171032	

PLACE CALLS

Using Switchboard Pro, you can call any number within or outside your PBX.



Note: Your outbound call is a two-legged call. The first leg offers the call to you; accept the outgoing call to dial out to the desired number.



Calling a contact within the PBX:

1. Click a contact in the Contact Directory list to open the **Contact Details**.
2. From the options, click **Place Call**.

Calling a contact outside the PBX:

1. Click  to open the Dial Pad.
2. Dial the phone number, and click .

PARK CALLS

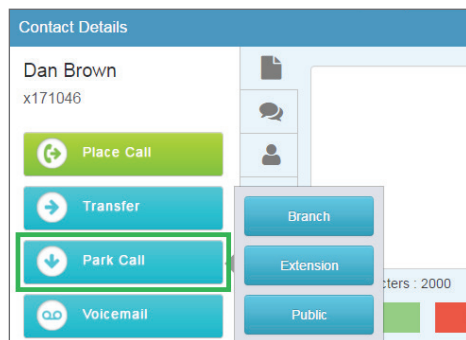
If you need to transfer a call to a PBX contact, but the desired contact is currently busy, park their call to be picked up by the contact once they are free. Call Parking allows you to park a call in its own automatically-numbered space, allowing for prompt and easy retrieval.

With Switchboard Pro, you can:

- **Park a call on an Extension:** only the targeted extension user (contact) can retrieve the parked call.
- **Park a call on a Branch:** only members of the targeted Virtual Office branch office can retrieve the parked call.
- **Public Park:** Any extension user within the PBX can retrieve the call.


Park from Contact Details:

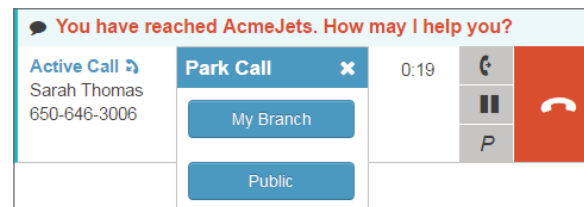
1. While in a call, click the desired contact in the Contact Directory list to open the **Contact Details**.
2. From the options, click **Park Call**.
3. In the drop-down, select whether to park the call in the selected contact's branch, on the contact's extension, or in public park.



4. In the receiving party's **Contact Details**, click  to notify them of the parked call.

Park from the Active Call drop-down:

1. During an active call, click  from the **Call Panel** area.
2. In the drop-down, select whether you want to park the call in **My Branch** (the branch that the receptionist belongs to) or in **Public** park.



3. In the receiving party's **Contact Details**, click to notify them of the parked call.


TRANSFER CALLS

Switchboard Pro allows you to transfer calls to the desired party within or outside your PBX. You can consult with the party before transferring (warm), or transfer directly (blind).


Blind transfer within the PBX:

1. Click a contact in the Contact Directory list to open the **Contact Details**.
2. From the options, click **Transfer**. The call is transferred to the contact.

Blind transfer outside the PBX:

1. During an active call, click  to transfer.
2. At the prompt, enter a phone number to transfer to.
3. Click the arrow by the entered number.
4. Wait for the ringing on the line to end to ensure the transfer is complete.

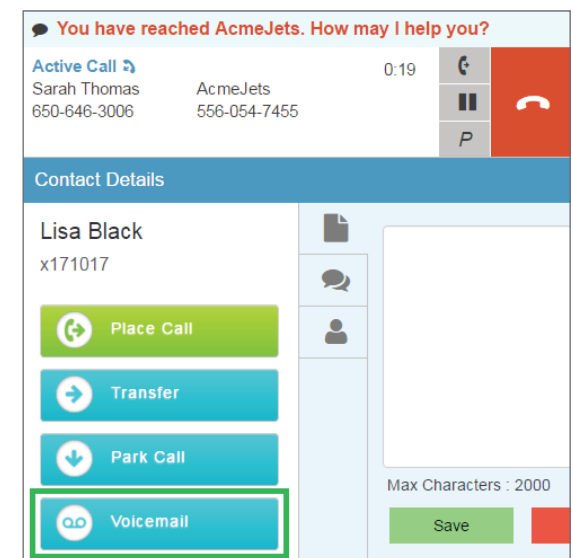
Warm transfer (within PBX only):

1. Put the active call on hold.
2. Click a user in the Contact Directory list to bring up the **Contact Details**.
3. From the options, click **Place Call**.
4. Accept the outgoing call.
5. Once the call is answered, inform the extension user about the transfer.
6. Click  next to the call on hold to transfer the call.

TRANSFER TO VOICEMAIL


If a caller needs to reach a PBX contact directly, but the contact is busy, you can transfer the caller to the extension's voicemail:

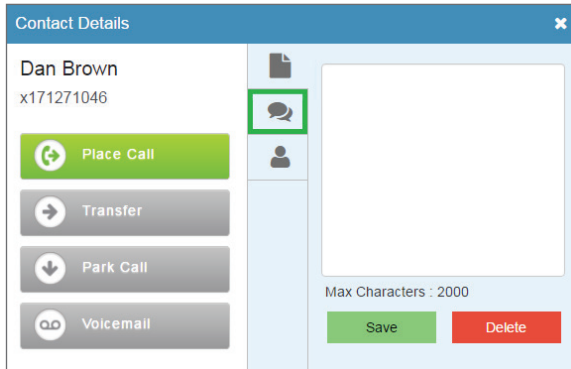
1. Click a contact in the Contact Directory list to open the **Contact Details**.
2. From the options, click **Voicemail**.
3. The caller is transferred to the user's voicemail.



CHAT WITH CONTACTS

You can chat with contacts listed in your Contact Directory. Chatting with contacts can also help facilitate warm call transfers and call parking.

1. In the Contact Directory, click the contact to chat with.
2. From the **Contact Details**, click  to chat.




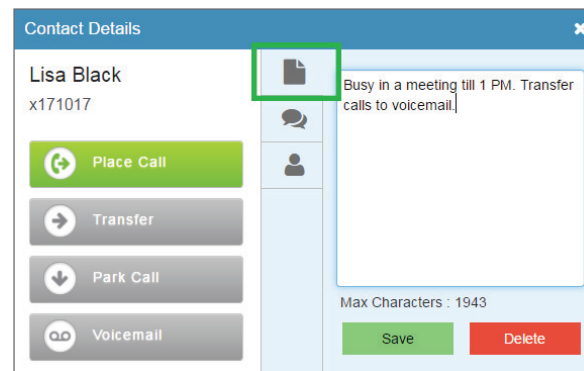
The chat window opens.

3. Enter a message and press **Enter** to send.
4. The contact receives the message on their Virtual Office desktop or mobile application.


ADD NOTES TO A CONTACT




Receptionists can attach notes to contacts within the PBX indicating their availability to take calls. If a contact is busy and wishes to forward all their calls to voicemail temporarily, the receptionist can enter a note for the contact and access it until removed.

1. Click the desired contact in the Contact Directory list to open the **Contact Details**.
2. From the tabs, click .
3. Add notes, and click **Save**.



To access a note:

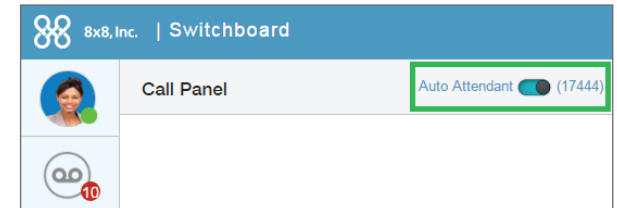
The Contact Directory list indicates notes attached to a user. You can read a note by simply clicking  next to the user status.

	Leandra	Kramer	Champion...
	Lisa	Simpson	
	Lisa	Black	
	Marlon	Dulay	Training
	Martha	Stott	Training

FORWARD CALLS TO AUTO ATTENDANT

You can forward calls to auto attendant during your break, or when you are unable to receive calls.

Auto attendants are set up by your PBX administrator for automatic call handling.



Move the slider to enable or disable call forwarding to Auto Attendant.

If you have access to multiple auto attendants, you can select which auto attendant to forward your calls to after you enable the feature.