



# 8x8 Work and Salesforce Integration.

How 8x8 integrations can work with your existing Business tools to optimise performance.

## Does 8x8 integrate with Salesforce?

Yes, it does, and Virtual Work for Salesforce enhances your team's effectiveness by creating one system of engagement. The quick-to-deploy integration provides your team with the ability to make, take and transfer calls within Salesforce, delivering a frictionless experience in every engagement. The features enable increased responsiveness and less admin with more support and selling.



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## Improve communication workflow and collaboration.

The Virtual Office for Salesforce frees your IT team from unnecessary workloads and offers the enhanced communication experience to the user. As the primary communications application, the Virtual Office Communications Panel for Salesforce enables the user to:

- Assign call notes to an account, contact, lead, or opportunity at any time
- Create follow-ups during or after a call
- Auto-log any received call and record conversations
- View presence and start a chat, or warm transfer
- Monitor conversations and whisper coaching tips
- Search Salesforce for records and associated call notes
- Review "unworked" calls that need logging



# Personalise every moment of engagement.

The integration of Virtual Office within Salesforce offers you and your team the ability to sync up communications and customer relationship management easily into a single platform. With Virtual Office for Salesforce, you can:

- Click to dial within Salesforce
- Receive screen pops of customer details
- Quickly log calls and notes to Salesforce accounts, contacts, and opportunities
- Create tasks and log previous calls
- See presence and chat, and make transfers

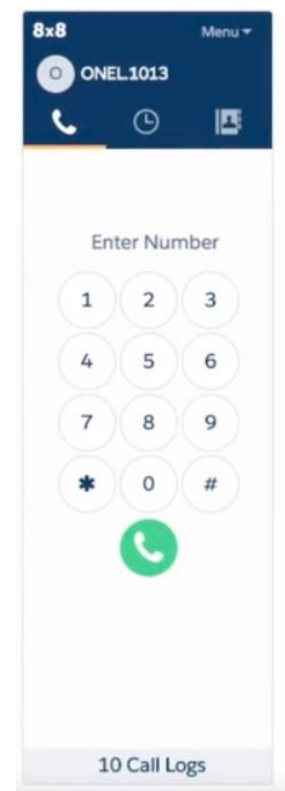


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## Look and Feel.

The 8x8 tool integrates directly into your Salesforce environment. With three tabs for functionality.

- Phone Tab – Allows you to make calls in Salesforce from the dial pad.
- Call log tab – Shows all recent call activity. If you hover over previous call information, it will give options to redial quickly or add notes/ tasks/ outcomes to the call. You can filter calls by clicking the unworked tabs which will show all calls which have not yet been logged against a salesforce record.
- Contacts – Allows you to access and search all contact records held on salesforce and quickly dial them or access their record page.



# Does it work?

At NSL we never recommend a product we wouldn't use ourselves.

We installed the 8x8 work integration into our Salesforce environment two years ago and we have been able to log calls and attach logs to records ever since. There is little to no setup required and the basic features of the plugin are self-explanatory and easy to use.

Like anything on Salesforce additional functionality can be added by experienced Admins, but we have no reservation recommending the service as a plug and play option.

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## Additional Resources?

There are a number of guides and additional resources which provide more information on the Salesforce/8x8 Integration, here are a few:

NSL Telecoms – Integration Website – [Click Here](#)

Salesforce - App Exchange – [Click Here](#)

8x8 - Work for Salesforce – [Click Here](#)

Youtube – Demo – [Click Here](#)

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### WHAT NEXT?

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