





Overview

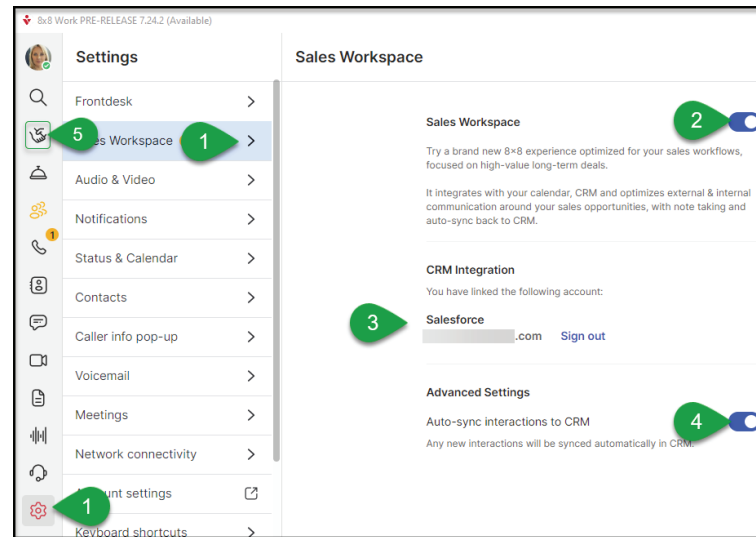
The new Sales Workspace solution within 8x8 Work is designed for sales professionals working with prospects and opportunities. It offers an optimized sales workflow focusing on high-value long-term deals. It integrates with Salesforce® and multiple calendars (Office 365, Google, iCloud, etc.), and optimizes external and internal communication around sales opportunities by offering the capabilities of calling, messaging, meeting, and tracking interaction history, all in one place. It allows quick access to a roster of 100 most recently updated opportunities. It allows adding private notes to contacts and sync next steps and interactions data back to the Salesforce. It also aims to be complementary in the Microsoft Teams ecosystem.

Install and sign in

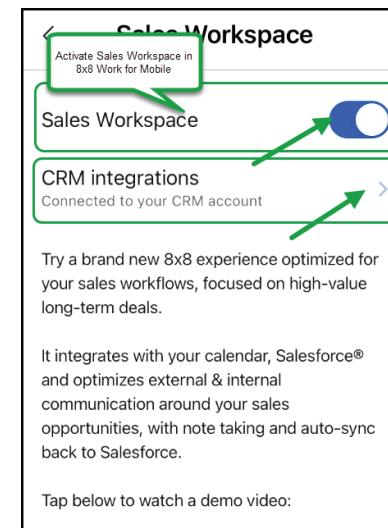
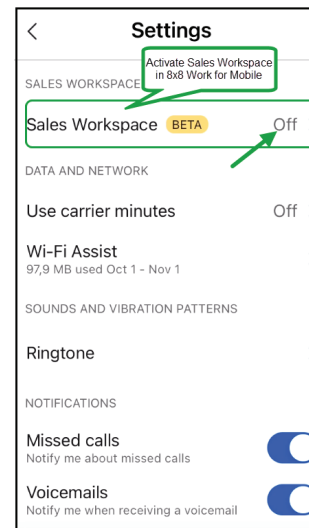
1. On your computer, download the [8x8 Work for Desktop](#) app.
2. Launch the app to open the login screen.
3. Enter your username and password given in your welcome email. If your company uses Single Sign-On (SSO), sign in using your standard company credentials.
4. Click **Login** to launch the app.

Activation

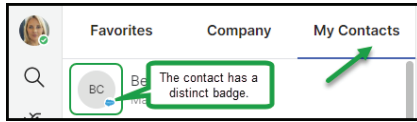
1. On the navigation menu, click **Settings**  > **Sales Workspace**.
2. Enable **Sales Workspace** to activate the Sales Workspace functionality in the 8x8 Work for desktop apps.
3. Click **Sign in** to log into Salesforce to activate the integration.
4. By default, the **Auto-sync interactions to CRM** is enabled and automatically syncs any new interactions (calls, voicemails, meetings) with the opportunity contacts. You can turn off/on the process of pushing interaction in the Opportunity Activity stream inside Salesforce, anytime.
5. The navigation menu now shows the Sales Workspace  icon. Click it to access the opportunities roster imported from Salesforce.



Note: To activate the Sales Workspace functionality in the 8x8 Work for Mobile app, go to **Settings** and manually enable the **Sales Workspace** toggle on.



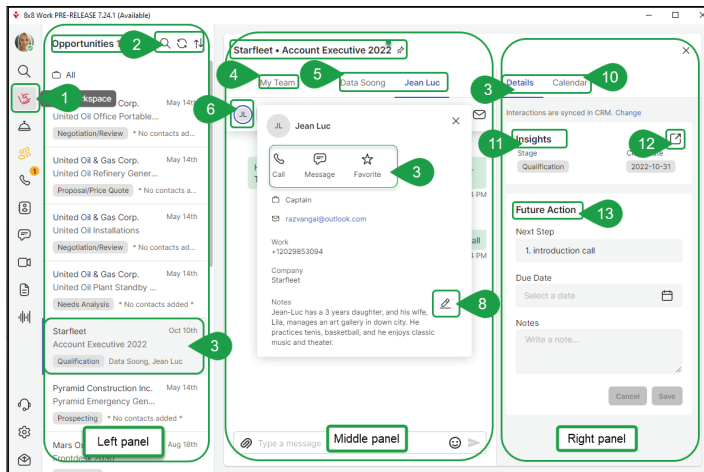
The opportunities contacts are automatically imported read-only and locally in **Contact > My Contact** directory, across devices, and regardless of where the activation was done (desktop or mobile). They have a distinct badge displayed.



Tour the interface

The 8x8 Sales Workspace main dashboard displays information about the opportunities imported from Salesforce grouped in three distinct panels:

- Left panel - a list of opportunities assigned to you.
- Right panel - the upcoming calendar events on the right side.
- Middle panel - all the relevant event insights, for a selected opportunity.



1. Consult the list of opportunities retrieved from Salesforce.
2. Prioritize opportunities by choosing how the opportunity list shows (search, sort, refresh).
3. Consult the opportunity items, namely opportunity name, stage, account name and contacts.
4. Create/assign multiple communication rooms around an opportunity in the **My Team** tab.
5. Access an opportunity contact record from the horizontal list.

6. Access record details of the selected contact.
7. Initiate a call or message with the contact or add the contact to your favorites.
8. Add your private note about the contact.
9. Access the details about that opportunity in the **Details** tab.
10. View an overview of your upcoming calendar events with your opportunities, in the **Calendar** tab.
11. Review the opportunity's close date and stage under **Insights**.
12. Open the opportunity directly in Salesforce.
13. See record notes or save new next steps for the opportunity, under **Future notes (Due Date and Notes are custom Salesforce fields. For more details, click [here](#) or send feedback from the app).**

View opportunities list

The opportunities list displays the latest modified 100 open opportunities. Each list item represents an open opportunity that is assigned to you and displays information about:

- Account name
- Opportunity name
- Opportunity stage
- Contacts linked in Salesforce to that opportunity

Sort opportunities

You can choose how the opportunity list shows:

- Search - by account, opportunity, stage or contact name.
- Sort - by upcoming close date, latest update, oldest update, next interaction, account name A-Z/Z-A.
- Refresh/sync from CRM (on mobile, swipe down).

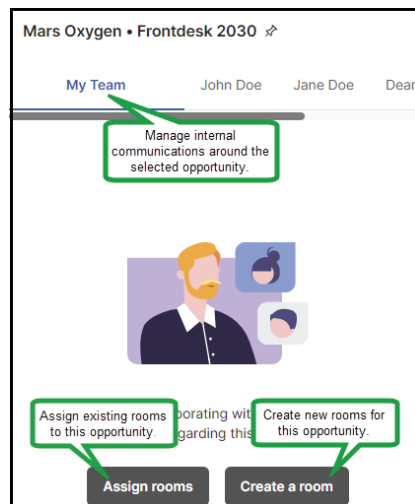
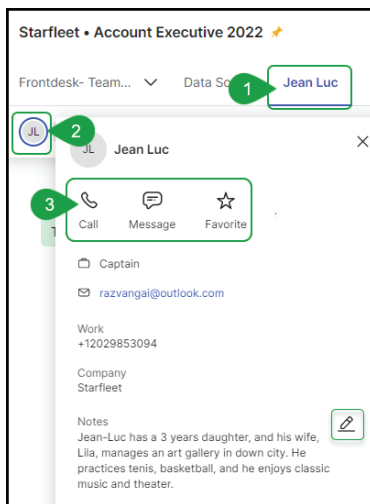
Communicate and collaborate with an opportunity contact

Once you select an opportunity, the middle panel displays contacts associated with the opportunity, and allows you to create/assign multiple communication rooms around the opportunity. In addition, an interaction stream displays information about calls, emails, messages, voicemail related to the first contact of the opportunity.

Contact info window

1. Select a contact in the contacts list to view the contact details.
2. Click the contact icon to display the available details about the selected contact.
3. From this info window, you can:
 - Call the contact by clicking **Call** 📞 .
 - Send a message by clicking **Message** 💬 .
 - Add to favorites in the by clicking **Favorite** ☆ .
 - Add your private note about this contact by clicking the 📝 icon in the contact info window. These notes are stored in 8x8 Work apps, not in Salesforce, and only you can see them (across devices). To remove a note, simply delete the text and click **Save**.
 - Pin an opportunity by clicking the pin 📌 icon to have it on the top of the list. Click again to unpin it.
 - Create/assign multiple communication rooms around important opportunities in the **My Team** tab, which is dedicated to internal collaboration.

Note: The **My Team** tab is not available if Team Messaging is disabled for the customer.



Access opportunity details

When you select an opportunity, the right panel displays two tabs:

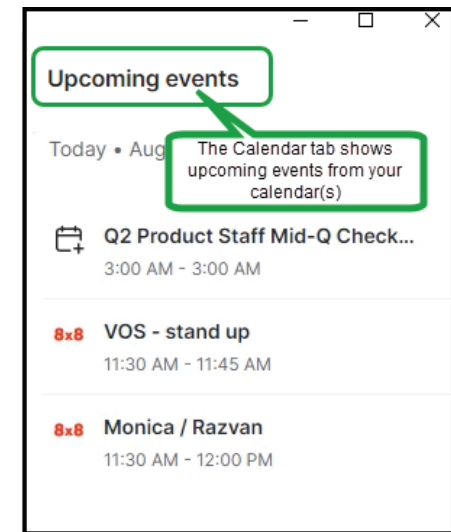
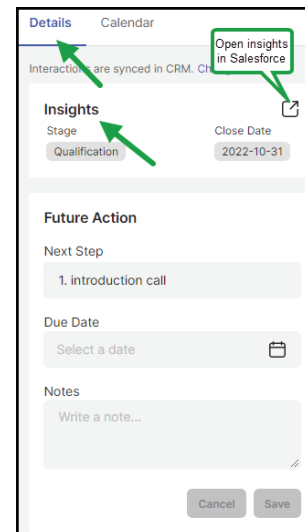
- **Details** - displays details about that opportunity.
- **Calendar** - displays an overview of your upcoming calendar events with this opportunity.

The Details tab

The **Details** tab displays details about that opportunity, such as:

- **Insights** - the opportunity close date and stage
- **Future Action** - the notes shown from Salesforce to inform about the discussion or save new next steps easily.

Note: The entire interaction is synced with CRM (Salesforce).



The Calendar tab

Get an overview of all your upcoming calendar events, including your opportunities event, both external and internal. Regardless of what meeting platform the event is on, join easily as it is synced in CRM (Salesforce).

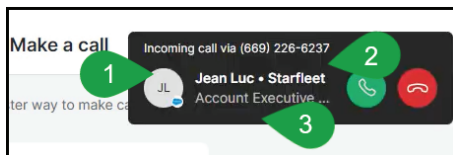
The **Calendar** tab displays the incoming events with this customer, on a timeline stream. Based on the synced calendars in the **Settings** ⚙️ > **Status** and contact email, the events are filtered at the opportunity level.

Note: You can sync your Google or Microsoft Office 365 calendar with the 8x8 Work for Desktop app. Meeting events in other platforms such as Zoom, MS Teams, Google Meet and Webex are detected and allow you to join these meetings directly in the system browser when the meeting reminder is shown or from upcoming events.

Identify opportunities from incoming calls

When you receive an incoming call from a current opportunity, the call card shows the information imported from Salesforce:

1. The contact name
2. The account name
3. The opportunity name



Upon answering the call, you are navigated automatically to **Sales Workspace > Opportunity**. You can view:

- The opportunity details
- The interaction stream selected for the contact, including the contact's private notes if any.

The call card is available to mute, hold, record or end the call.