Overview

Sales and Account Workspace is a communication and collaboration tool that helps you build stronger relationships with customers and prospects. You can optimize your sales and account engagement workflows by focusing on high-value, long-term deals and relationships. It is dedicated to account and success managers, field sales, outside sales, client sales, account executives, and customer engagement roles. It integrates with Salesforce® by automatically syncing all integrations in your CRM.

- **8x8 Sales Workspace** is optimized for pre-sales workflows. It is dedicated to sales professionals working with prospects and opportunities and is available on 8x8 Work apps (Desktop, Web, and Mobile).
- **8x8 Engage Account Workspace** is optimized for post-sales workflows and focused on nurturing a sustainable account relationship. It is only available for 8x8 Work Desktop and Web.

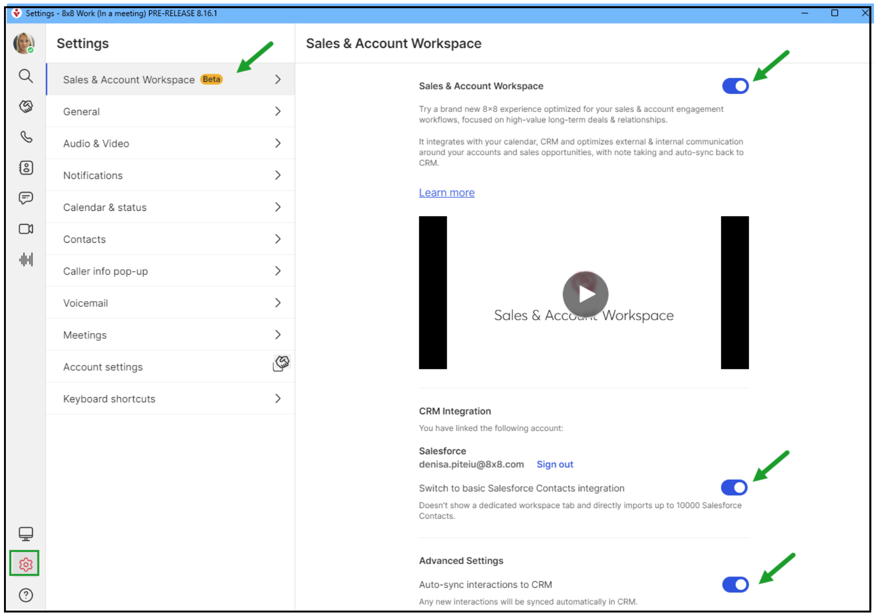
The 8x8 Sales & Account Workspace integrates with Salesforce® and various calendars, including Office 365, Google, and iCloud. It enhances external and internal communications related to accounts and sales opportunities, featuring note-taking capabilities and automatic synchronization to the CRM.

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.

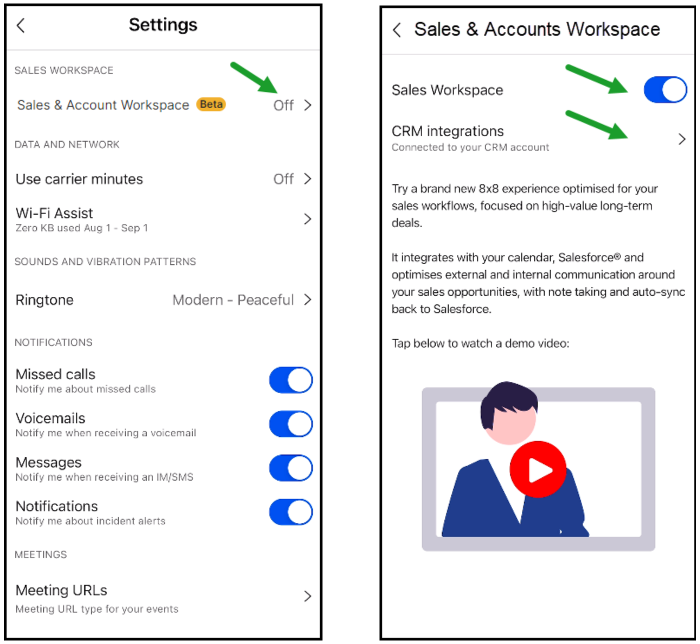
Activation

1. On the navigation menu, click **Settings** > **Account Workspace (Beta)**.
2. Enable **Sales @ Account Workspace** to activate this functionality in the 8x8 Work apps and click **Start using Sales & Account Workspace** to link your CRM (Salesforce®) account.
3. Click **Sign in** using the user's custom domain to log into Salesforce® to activate the integration. Currently, integration is supported exclusively with Salesforce®.
4. Disable the **Switch to basic Salesforce Contacts integration** toggle to integrate the CRM. By default, it is disabled, and the **Sales & Account Workspace** menu is displayed in the navigation menu.
5. Manage the auto-sync interactions with CRM (Salesforce®) by disabling or enabling the process of pushing interactions into the opportunity/account activity stream within Salesforce® at any time. The **Auto-sync interactions to CRM** toggle is enabled by default, automatically syncing any new interactions, such as calls, voicemails, and meetings, with the opportunity/account contacts.
6. Click **Sales & Account Workspace** in the navigation menu to access the opportunities and the accounts imported from Salesforce®.



Activate Sales & Account Workspace in 8x8 Work for Desktop/Web

7. Once the Sales & Account Workspace tool is activated, the navigation bar displays the **Sales & Account Workspace** navigation icon. Click **Sales & Account Workspace** to open the Sales & Account Workspace page and start working with opportunities and accounts.



Activate Sales & Account Workspace in 8x8 Work for Mobile

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

Manage opportunities flow

The Sales Workspace solution is designed for sales professionals who work with prospects and opportunities. It offers an optimized sales workflow that focuses on high-value, long-term deals.

- Go to **Sales & Account Workspace** .
- Select a relevant list view from Salesforce®.
  - Sort and filter the list view.
  - View opportunities or account details.
- Manage contacts of an opportunity or an account.
  - Select an opportunity contact.
- Communicate and collaborate with contacts.
  - Create or assign rooms for internal collaboration and communication.
- Access details about opportunities or accounts.
  - Consult insights and future actions related to an opportunity or account.
  - Consult your upcoming calendar opportunity-account events.
- Identify opportunities from incoming calls.

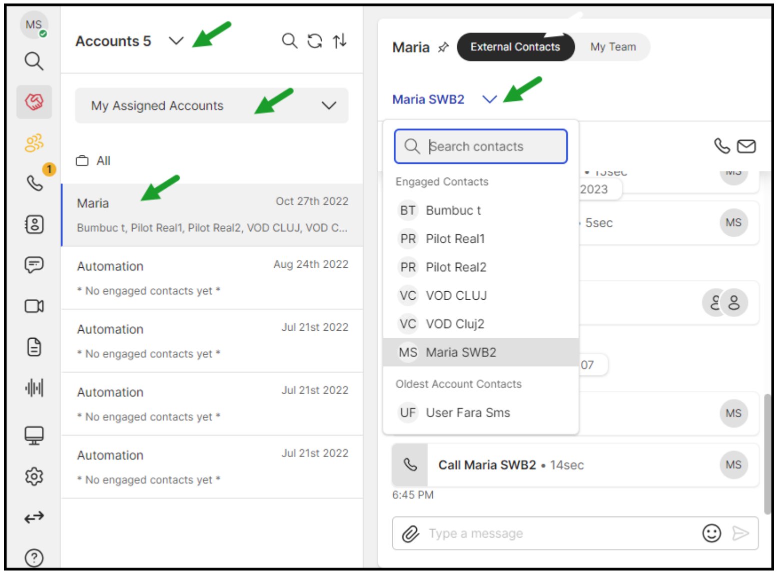
Manage accounts flow

The Account Workspace solution is a communication and collaboration tool that helps you build stronger customer relationships and stay focused on high-value, long-term deals.

- Go to **Sales & Account Workspace** .
- Select a relevant list view from Salesforce®.
  - Sort and filter the list view.
  - View opportunities or account details.
- Manage contacts of an opportunity or an account.
  - Select account contacts to engage with.
- Communicate and collaborate with contacts.
  - Create or assign rooms for internal collaboration and communication.
- Access details about opportunities or accounts.
  - Consult insights and future actions related to an opportunity or account.
  - Consult your upcoming calendar opportunity-account events.

Manage opportunity and account list views

First, select the type of CRM (Salesforce®) objective you wish to view, such as **Opportunities** or **Accounts**. The left panel lists the most recent opportunities or accounts imported from Salesforce®. Select a relevant List View from Salesforce® to display the details and related contacts.



Manage opportunity and account list views

Select a relevant list view from Salesforce®

1. On the **Sales & Account Workspace** page, in the left panel, select the type of objective you wish to view, such as **Opportunities** or **Accounts**.
2. Select the opportunities or accounts list view you wish to view.
3. You can choose how the opportunity or account list appears.
4. Consult a summary of any opportunity/account assigned to you from the list.
5. Pin the desired opportunity/account at the top for the current selected **List View**.

Sort and filter the list view

You can choose how the opportunity/account list view shows:

- **Search** opportunities by account, opportunity, stage or contact name. Search accounts by account or engaged contact name.
- **Sort** opportunities by latest update, oldest update, next upcoming interaction, account name A-Z/Z-A and, for opportunities only, by the forthcoming close date.
- **Refresh/sync** from CRM (on mobile, swipe down) to force a new sync in addition to the regular ones.
- Move the opportunity to the top of the list under **Pinned** by clicking **Pin** to have it on the top of the list. Click again to unpin it.

View opportunities or account details

The selected objectives assigned to you in Salesforce® will be imported into the app, along with their contacts. The objectives list displays the most recently modified 100 open opportunities/accounts in the selected **List View**. Each list item represents an opportunity/account assigned to you and displays information about the respective opportunity or account, and you can:

- Consult the opportunity details, such as name, opportunity stage, account name and the contacts linked in Salesforce® to that opportunity.
- Consult the account details, including the account name and the engaged contact names.

Manage contacts of an opportunity or an account

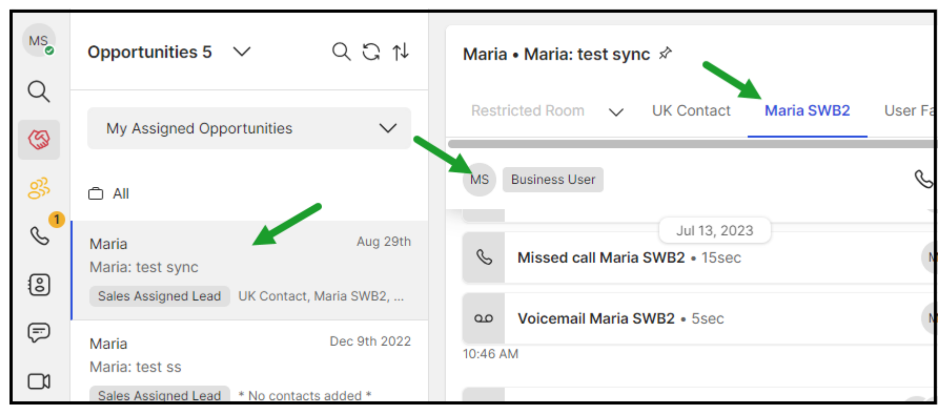
Once you select an opportunity/account, the middle panel displays the associated contacts. You can communicate and collaborate with any contact or create/assign rooms for internal collaboration and communication around it. In addition, an interaction stream displays information about all calls, emails, messages, voicemails, and meetings with the opportunity or account contact in chronological order. If joined from the 8x8 Work meeting notification, the interaction stream will capture even other meeting platform events (Zoom, MS Teams, etc.).

Select an opportunity contact

Once you select a particular opportunity, go to the opportunity details panel.

Select the contact you want to engage with in the top horizontal contact list.

Click the selected contact icon. The contact info card displays the details of the selected contact.

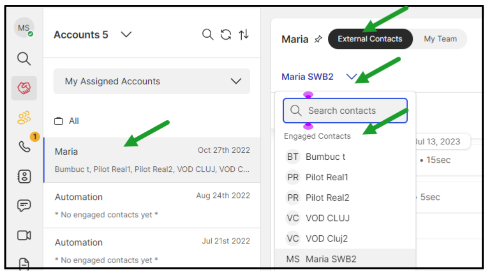


Select an opportunity contact

Select account contacts to engage with

Once you select a particular account, go to the account details panel. To initiate engagements, you must manually select the contacts related to Salesforce® accounts. After that, automatic interaction tracking begins. You can manually add up to 10 contacts per account at a time. Selecting an 11th contact stops monitoring the oldest engaged Contact.

1. Once you select a particular account, go to the account details panel.
2. Go to the **External Contacts** tab and expand **My Contacts** ⌄.
3. Click the contact you want to engage with and repeat for all contacts you wish to include in this account. At the top of the list, you will view all the selected contacts grouped under **Engaged Contacts**.

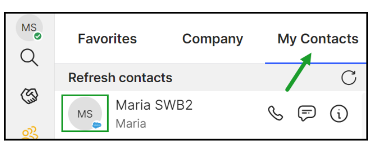


Select an account contact

Cross-platform CRM contact sync

Salesforce® contacts are imported automatically as read-only and stored locally under **Contacts** > **My Contacts**, similar to Outlook or Google contacts, This import occurs across all devices, whether the activation is on desktop or mobile. They have a distinct badge displayed.

> **Note:** The current version does not support adding or updating contacts back to Salesforce®.

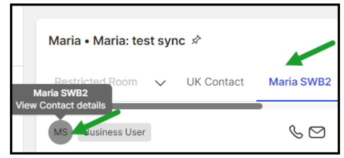


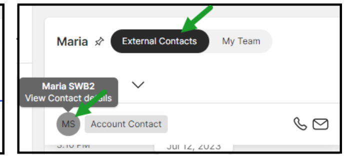
Cross-platform CRM contact sync *Contact badge*

Communicate and collaborate with contacts

After you select a contact from the contacts list, you can access the Salesforce® contact card, private notes, and quick actions.

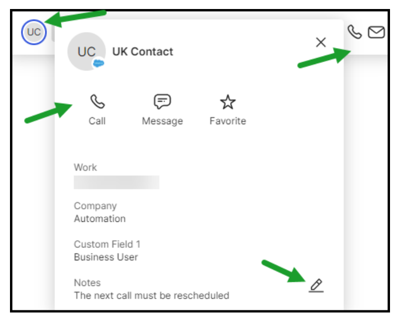
1. Click the contact icon to display the details of the selected contact.





Opportunity contact *Account engaged contacts*

2. From the contact info card, you can:
   - Call the contact by clicking **Call** 📞.
   - Send a message to the contact by clicking **Message** 💬. (This service is available only for US and Canadian customers).
   - Email the contact by clicking **Email** ✉. (It opens the system's default email client).
   - Add the contact to your favorites by clicking **Favorite** ☆.
   - Add your private note about this contact in the contact info card by adding your text under **Notes** and save it. These notes are stored in 8x8 Work apps, not in Salesforce®, and only you can see them (across devices). To edit a note, click **Edit** ✎ and make changes. Then click **Save**. To remove a note, delete the text and click **Save**.



Access contact card, private notes, and quick actions

Create or assign rooms for internal collaboration and communication

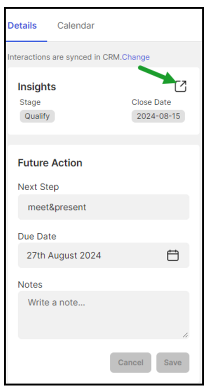
Create or assign multiple communication rooms around opportunities or accounts for internal collaboration. Go to the **My Team** tab and click **Create a room** or **Assign rooms**. To learn how to manage chat rooms, see [Use Team Messaging](#).

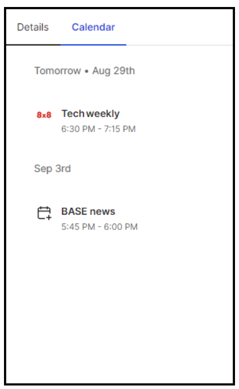
> **Note:** The **My Team** tab is unavailable if Team Messaging is disabled for the customer.

Create or assign rooms for internal collaboration and communication

Access details about opportunities or accounts

Go to the right panel and consult and manage the details about the selected opportunity/account, or access the overview of your upcoming calendar events with this opportunity.





Access insights and future actions

Access your upcoming calendar opportunity/account events

Consult insights and future actions related to an opportunity or account

In the right panel, go to the **Details** tab:

- In the **Insights** section, see the close date and the stage of an opportunity/account.
- Click **Open in CRM** to open the selected Salesforce® opportunity in the system browser.
- In the **Future Action** section, you can see the notes from Salesforce® to find more details about the discussion or quickly save new next steps.

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

Consult your upcoming calendar opportunity-account events

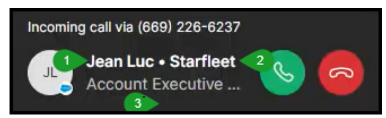
Get an overview of all your upcoming calendar events, including events, whether external or internal. Thanks to synchronization with CRM (Salesforce®), you can join any event swiftly, irrespective of the meeting platform.

Sync your Google or Microsoft Office 365 calendar with the 8x8 Work for Desktop app. The app can detect meeting events from Zoom, MS Teams, Google Meet, and Cisco Webex. You can join these meetings directly through the system browser when a reminder appears or by selecting them from the list of upcoming events.

The connected calendar status displays all upcoming events. Based on the selected account and contact, all forthcoming events are filtered at the account level based on the contact's email and are displayed in the timeline stream.

Identify opportunities from incoming calls

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



Incoming call card displays information from Salesforce®:

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

Upon answering the call, you will be automatically directed to **Sales Workspace > Opportunity** where you can:

- View the oppotunity details.
- See the interaction stream chosen for that contact, including any private notes.

Additionally, you can mute, hold, record, or end the call using the call card.