



# Getting Started with Switchboard Pro

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# What does Switchboard Pro do for you?

- Handle multiple calls with an easy-to-use interface
- Transfer calls to users or Auto Attendant through your browser
- Track colleagues' status
- Corporate Directory with real-time status icons
- Visual Voicemail

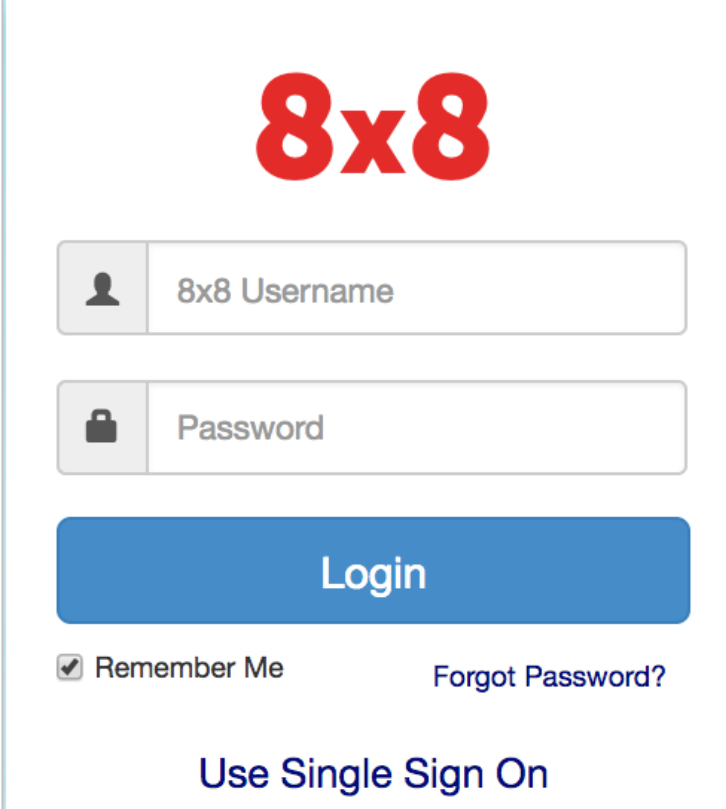


# Switchboard Pro

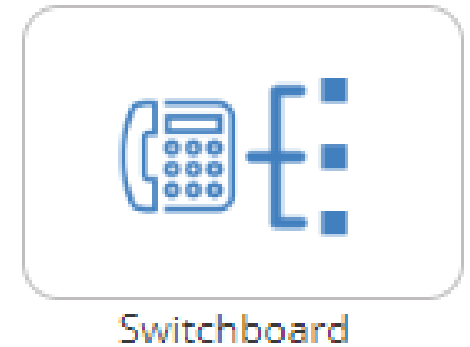
# Login Information

## *Standard Login or Single Sign On*

1. Navigate to login.8x8.com
2. Enter your credentials and click **Login**
3. If **using Single Sign on** click the option and enter your standard work user credentials
4. Select **Switchboard** to launch the application



The screenshot shows the 8x8 login interface. At the top is the red 8x8 logo. Below it are two input fields: the first is labeled '8x8 Username' with a person icon, and the second is labeled 'Password' with a lock icon. A blue 'Login' button is positioned below the fields. Underneath the button are two links: 'Remember Me' with a checked checkbox and 'Forgot Password?'. At the bottom of the form is a link that says 'Use Single Sign On'.



# Switchboard Pro Interface

## 1. Call Panel Window

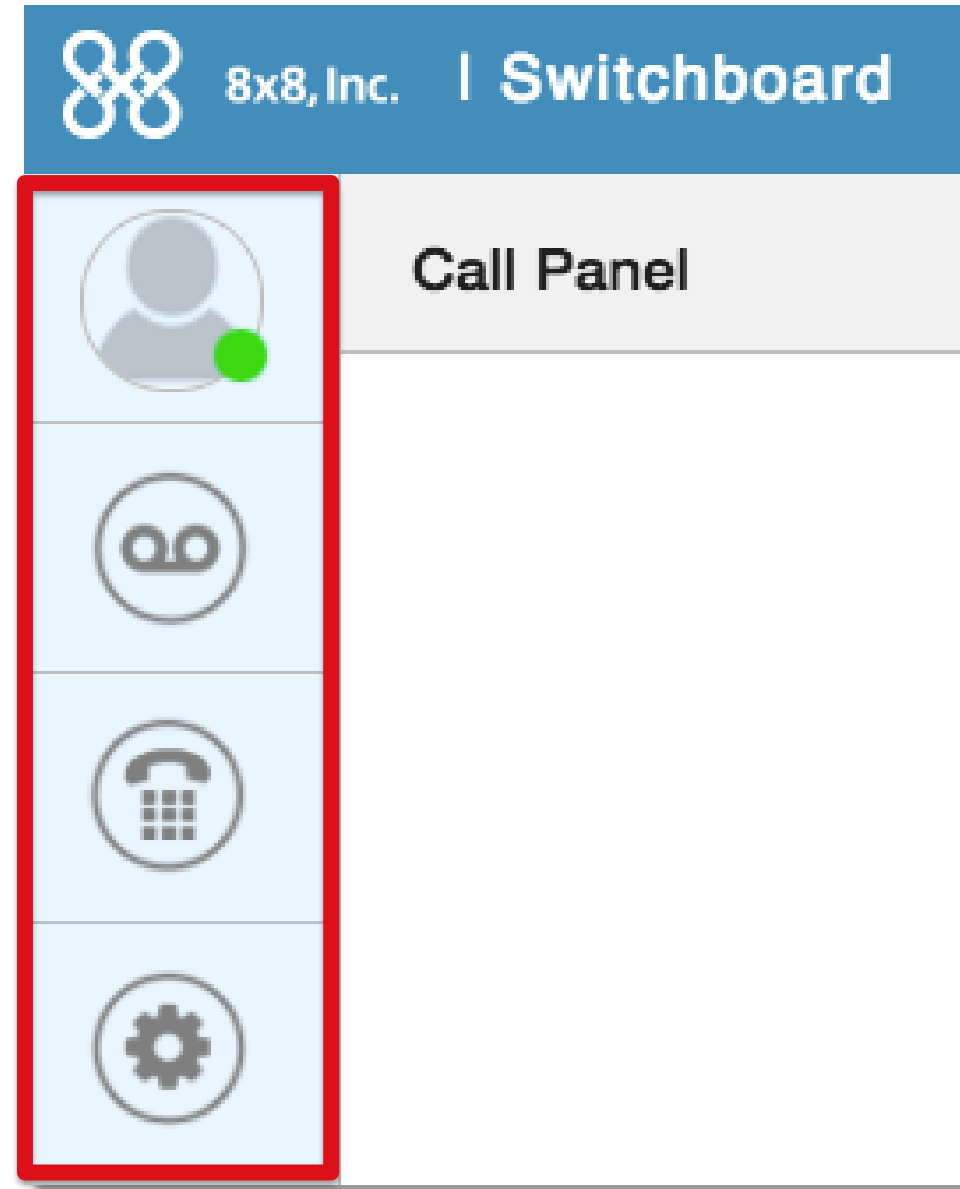
## 2. Contact Directory Window

The screenshot displays the Switchboard Pro interface. The top navigation bar includes the 8x8 logo, the text "8x8, Inc. | Switchboard", and a "What's new?" link with an information icon. On the left, a vertical sidebar contains icons for a user profile, a call panel (with a red '2' notification), a call log, and settings. The main area is split into two sections. The left section, titled "Call Panel", is currently empty. The right section, titled "Contact Directory", features a search bar and a table of contacts. A red arrow points from the "Call Panel" title to the top of the interface, and another red arrow points from the "Contact Directory" title to the search bar. The table lists contacts with columns for Status, First, Last, Department, Extension/Phone, Mobile, and Branch. A vertical alphabetical index is on the far right.

Status	First	Last	Departme...	Ext / Pho...	Mobile	Branch	#
●	Derek	Smith	Marketing	1001			A
●	Alice	Jones	Service	1002			B
●	Charlie	Booker	Support	1003			C
●	Nicole	Jackson	Sales	1004			D
●	David	Jester	Operations	1005			E
●	Jenny	Richards	Sales	1006			F
●	Zachary	White	Training	1007			G
							H
							I
							J
							K
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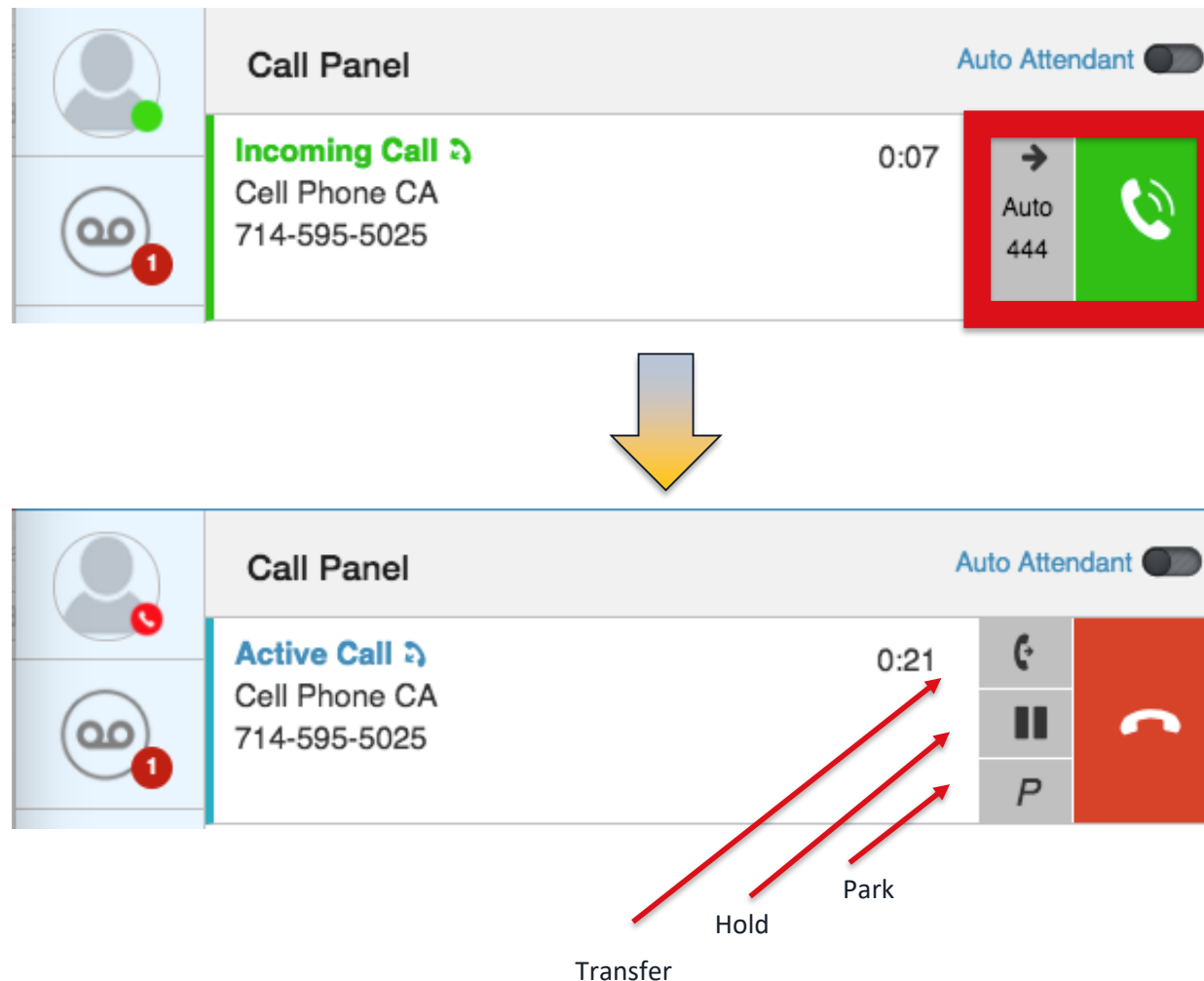
# Switchboard Pro Overview

- Navigate via four icons along window:
  - Agent Status
  - Voicemail
  - Dial Pad
  - Settings



# Accepting Calls





- Incoming calls are displayed in your Call Panel
- Accept the call via Virtual Office, or your desk phone, or forward the caller to the Auto Attendant
- Manage call controls in Switchboard Pro



# Place Call on Hold

- Press the pause icon to put the caller on Hold
- Retrieve the call, end the call, or transfer to another user



	<b>Call Panel</b>		<b>Auto Attendant</b> <input type="checkbox"/>	
	<b>On Hold</b> 	0:18		
Cell Phone CA 714-595-5025	0:12			



# Transfer Call to Colleagues

The screenshot displays the 8x8 Switchboard interface. At the top, the header reads "8x8, Inc. | Switchboard". Below this is a "Call Panel" with a profile icon and a red notification badge. The main area shows an "Active Call" for "Derek Smith 1001" with a duration of "0:16". To the right of the call information is a table with columns for "Status", "First", "Last", and "De". The table contains two rows: one for "Derek Smith" and one for "Alice Jones". A red "End Call" button is visible. A "Contact Details" pop-up window is open over the table, showing details for "Charlie Booker x1003". The pop-up has a close button (X) and four action buttons: "Place Call" (green), "Transfer" (blue, highlighted with a red arrow), "Park Call" (blue), and "Voicemail" (blue). A vertical sidebar on the left contains icons for a profile, a call with a red badge, a call grid, and a settings gear.

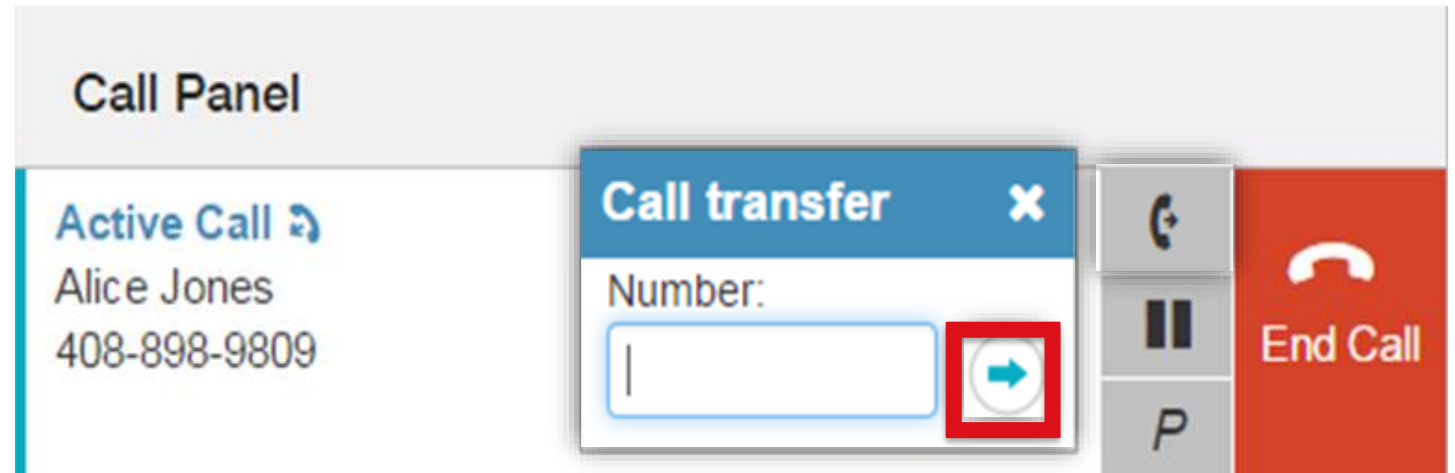
1. Place the current call on hold
2. Select the extension who will receive the transfer
3. In the Contact Details, click the **Transfer** button to transfer the call

# Transfer Calls Outside your Office

1. From a live call, click **Transfer** icon
2. Enter a phone number in the **Call Transfer** box and click the **blue arrow** to complete the transfer

## ★ Tip

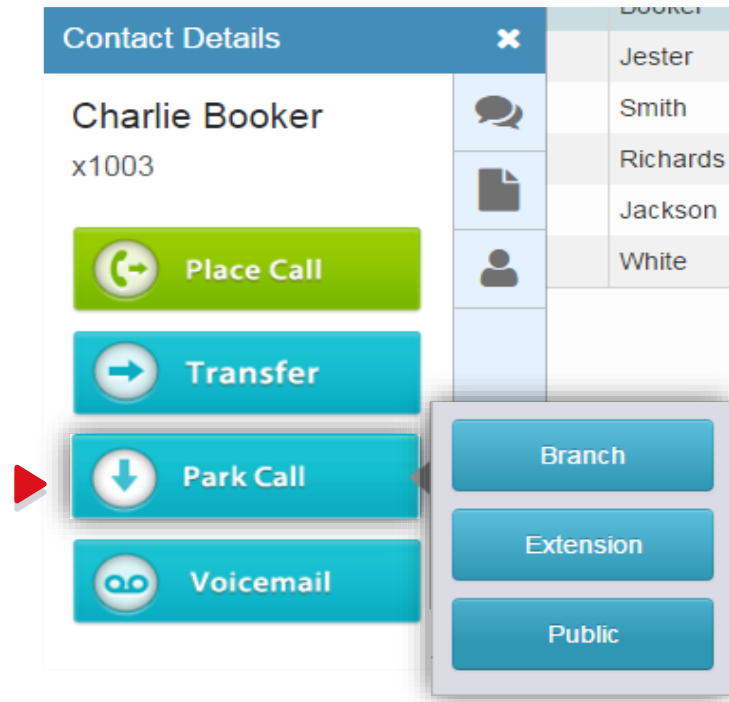
If multiple calls are On Hold, the transfer button is visible on all calls on hold. Transfer the On Hold call directly below the On The Phone call. You can transfer any call with a visible transfer button to the extension to which you are speaking.



# Park a Call

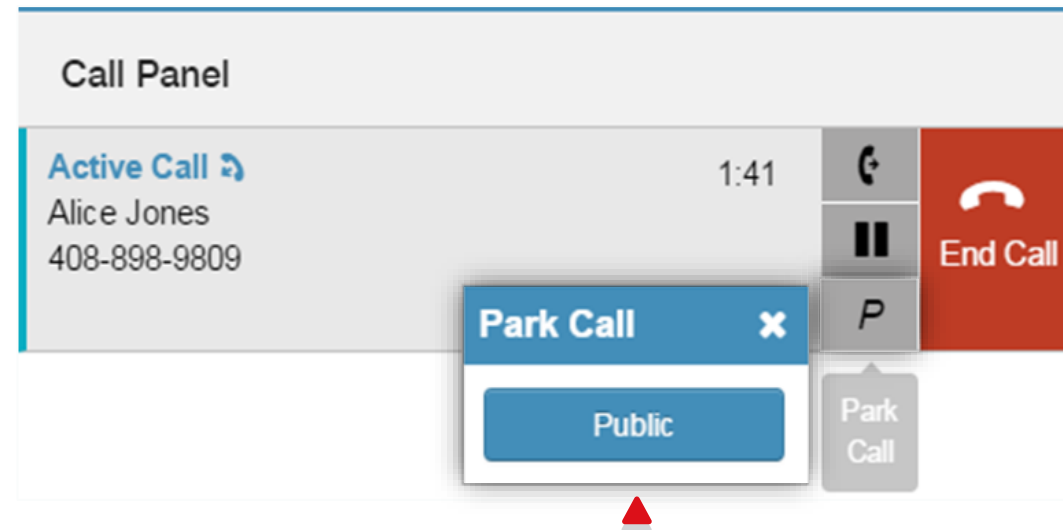
To park a call for a colleague:

- From a user's Contact Details, select **Park Call > Extension**



To park a call publicly so anyone may retrieve it:

- From the Call Window, select the **Park icon** and select **Public**





# Further Resources

# Tips & Troubleshooting

## Automatic Log Out



Switchboard Pro is a single user license, allowing one concurrent session login at a time.

If you share login credentials with other users, you will be automatically logged out of your session when someone else logs in.

On the plus side, this also means that you can login to your Switchboard Pro account from any computer at any time.

If your organization requires multiple concurrent sessions of Switchboard Pro, please ask your administrator about getting one license for each concurrent session required.

## Accidental Log Out On Mouse Click



**Left mouse click** opens the Extension Menu.

**Right mouse click** opens browser options.

Selecting **Right Click > Navigate Away** will log out of Switchboard Pro.

To re-open Switchboard Pro:

- Log back in, or
- Click the browser back button, or Find the URL link in History or
- Bookmarks to return to Switchboard Pro login screen

## Unable to Log In



1. Resend password from the login page
2. Click the **Login Help** link and follow the prompts to reset your password
3. Login with the new password

## Select Resources

- Switchboard Pro – [Quick User Guide](#)
- Desk Phones – [Quick User Guides](#)
- Virtual Office Desktop – [Quick User Guide](#)
- Academy – [Free Online Training](#)

## What to do next

- Watch for 8x8 Welcome email with Virtual Office login & links
- Login to Virtual Office and open Switchboard Pro

OR

- Login to Switchboard Pro via the [login.8x8.com](http://login.8x8.com) page, and use with your desk phone

# Connect with 8x8


For tips, updates and the latest information

 [8x8.com](http://8x8.com)

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

 [facebook.com/8x8Inc](https://facebook.com/8x8Inc)

 [linkedin.com/company/8x8](https://linkedin.com/company/8x8)

 [youtube.com/8x8Inc](https://youtube.com/8x8Inc)

# 8x8