8x8 Frontdesk | Quick User Guide

Requirements

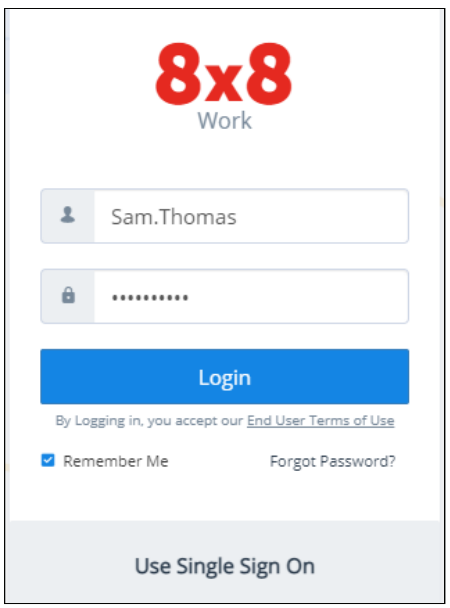
8x8 Frontdesk is a flexible and easy-to-use desktop based application for 8x8 Work users. It offers better call management capabilities to front desk receptionists and improves their experience in handling a large volume of calls and needing to frequently transfer calls.

To use 8x8 Frontdesk, you need:

- An 8x8 license of X4 or higher
- Frontdesk capability enabled by your administrator in 8x8 Admin Console

Install and log in

1. On your computer, download and install [8x8 Work for Desktop]().
2. Launch the app to open the login screen.
3. Enter your username and password.

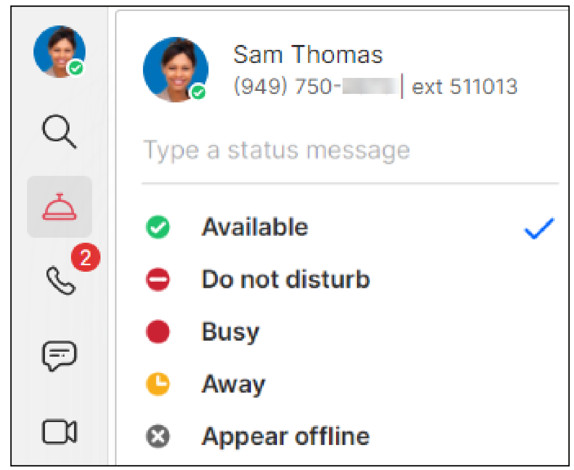


4. Click **Login** to launch the app.
5. From the navigation menu, click **Frontdesk** to access the receptionist functionality.

Note: You can also use the receptionist functionality using your activated deskphone. To switch to your deskphone, click **Call Using** in the navigation bar and select **Deskphone** to place and receive calls using your deskphone.

Set your presence status

Use your profile to set your status and other settings.



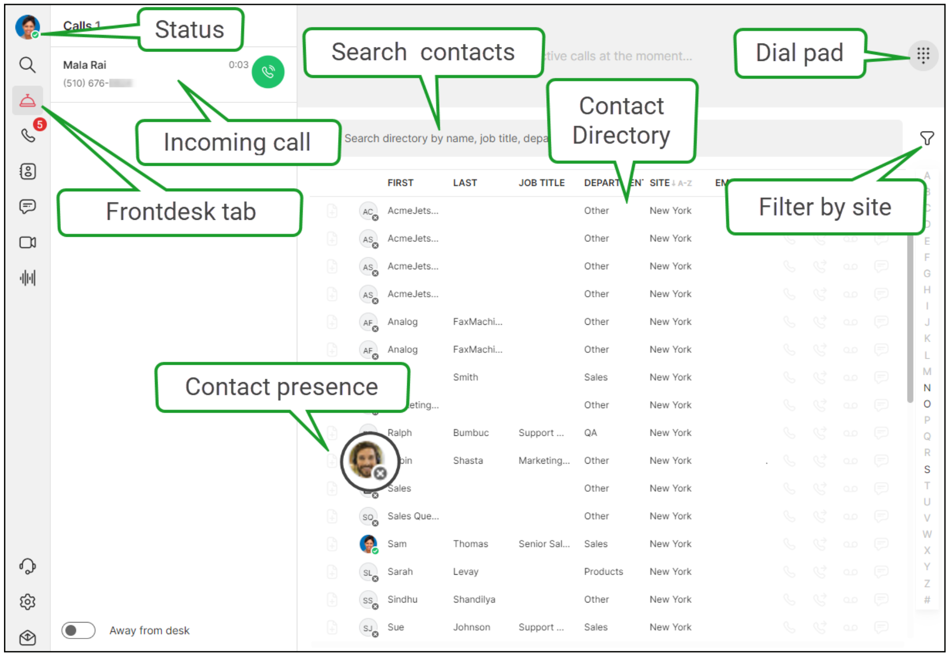
- **Available**: Available for calls and chats
- **Do not disturb**: Busy, and forwards incoming calls to voicemail
- **Busy**: Busy, but available for calls and chats
- **On a call (status set automatically)**: Busy on a call or in an 8x8 meeting
- **Away**: Away from their desk or inactive for some time
- **Appear offline**: Appears as offline

View the presence status of your contacts in the contact directory. You can view whether a contact is available for communication.

Tour the interface

The 8x8 Work for Desktop interface offers the abilities to access your contacts, place and receive calls, chat with contacts, attend video meetings, and more.

The 8x8 Frontdesk feature allows receptionists to receive calls and route them to the desired contacts within the company.

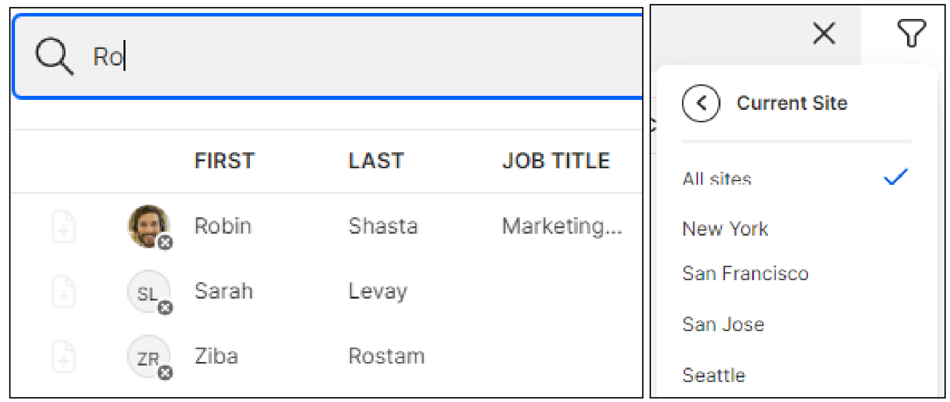


- **Frontdesk tab**: Access the 8x8 Frontdesk functionality.
- **Status icon**: Set your status and other preferences.
- **Incoming calls**: View an incoming call with callee details and greetings.
- **Dial pad**: Dial numbers to call outside of your contact list.
- **Contact directory**: Lists and sorts contacts within your company directory.
- **Search contacts**: Search for contacts based on name, site, extension, and more.
- **Filter by site**: Filter contacts based on site, and select the desired information columns to show in the contact directory.
- **Contact presence**: Know whether a contact is available, busy, or offline.

Search for contacts

To search contacts in your contact directory, type a name, department, or other identifying information available in 8x8 Frontdesk into the search bar. The search results filter as you type.

To filter contacts based on site, click , then click **>** next to **Current Site**, and select a site from the list.

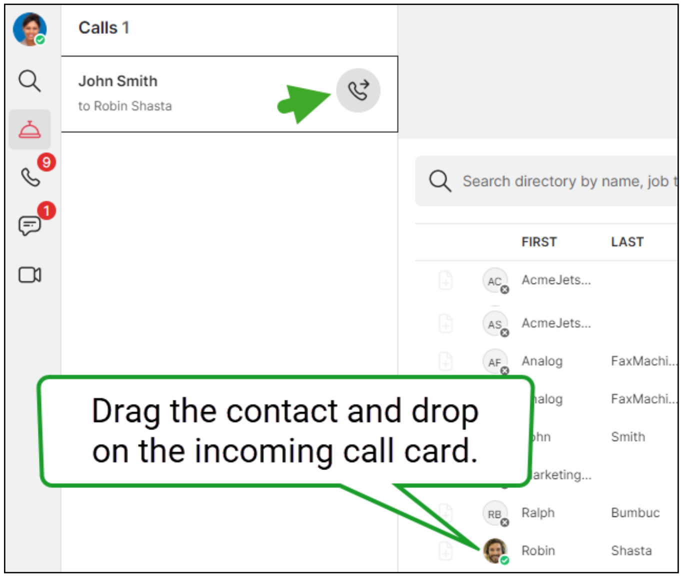


Receive calls

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:
   - Transfer the call without consulting (cold transfer)
   - Consult via call/chat and then transfer the call (warm transfer)
   - Transfer to voicemail
   - Drag and drop a contact onto the active call to transfer to voicemail

Deflect calls

Let's say you receive calls from a caller who typically wishes to speak to a specific contact. If you know the destination of an incoming call, simply drag and drop the contact record from the directory to the incoming call card. Click 📞 for a cold transfer. The call is transferred to the selected contact.



Transfer calls

8x8 Frontdesk allows you to transfer calls to the desired party within or outside your organization. You can consult with the party before transferring the call to them (warm transfer), or transfer directly without consulting (cold transfer).

Cold transfer

1. Accept the incoming call and place it on hold.

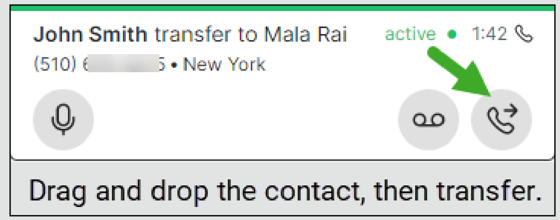
   Note: Placing a call on hold disables contact auto-filtering by site and loads the entire contact directory.

2. Hover over a contact in the contact directory list to view the transfer options.

   Note: Contacts in your directory include **Company** contacts as well as personal contacts saved under **My Contacts**.

3. From the options, click 📞 to transfer the call without consulting. The call is transferred to the contact.

   Note: You can also drag and drop the contact record to the active call card and click 📞 to transfer.

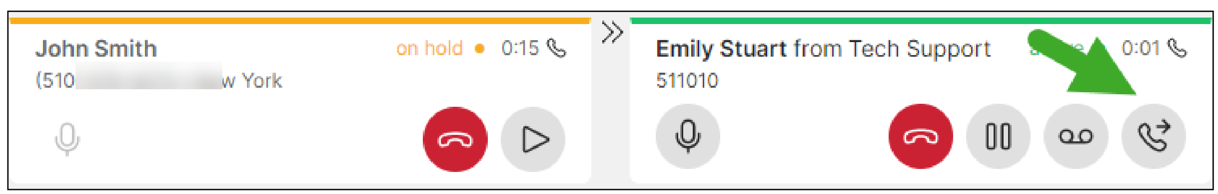


Warm transfer

1. Accept the incoming call and place it on hold.

   Note: Placing a call on hold disables contact auto-filtering by site and loads the entire contact directory.

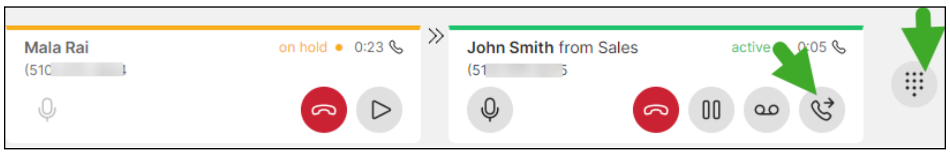
2. Hover over a contact in the contact directory list to view the transfer options.
3. From the options, click 📞 to place a call. A new call card appears for this outbound call.
4. Once the call is answered, inform the contact about the transfer.
5. Click 📞 in the outbound call card to transfer the call.



Blind transfer outside the organization (using the dial pad)

Let's say you need to transfer a call to an external contact or a contact's personal phone number, and you do not have them in your contact directory. Simply call the number using the dial pad, and once the call is answered, transfer the call.

1. Accept the incoming call and place it on hold.
2. Click to open the dial pad.
3. Enter a phone number and click **Call**. An outbound call is placed to the external number.
4. On the new call card that appears for this outbound call:
   - For a cold transfer, and select to transfer the call.
   - For a warm transfer, once the call is answered, inform the external party about the intended transfer, and select to transfer the call.
   - Select to transfer to the voicemail of the external party.



Transfer with chat consultation

You can consult contacts in your contact directory via chat before transferring a call. Chatting with contacts can help facilitate cold call transfers.

1. Accept the incoming call and place it on hold.
2. Hover over a contact in the contact directory to view the transfer options, and click to chat.
3. After confirming their availability, click in the chat window to transfer the call.

Transfer to voicemail

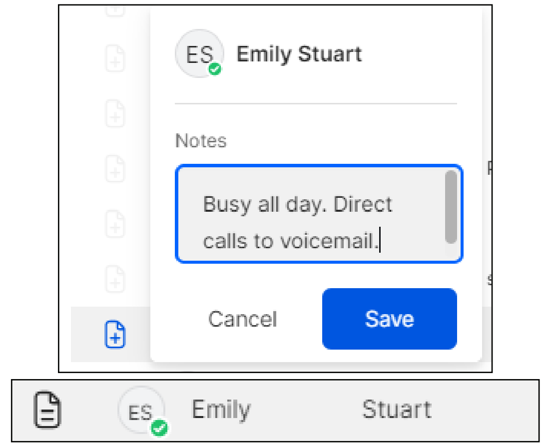
If a caller needs to reach a contact directly, but the contact is busy, you can transfer the caller to the user's voicemail.

1. Accept the incoming call and place it on hold.
2. Hover over a contact in the contact directory to view the transfer options, and click to transfer the caller to the user's voicemail.

Attach notes to contacts

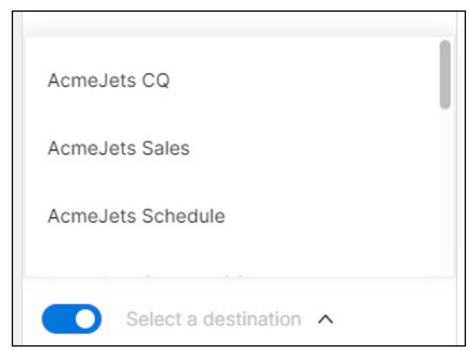
Receptionists can attach notes to contacts indicating their preferences in regards to taking calls. If a contact is busy and wishes to forward all their calls to voicemail temporarily, the receptionist can enter a note for the contact and access it until removed.

1. Click or hover over the desired contact in the contact directory list.
2. Click to add a note.
3. Add notes and click **Save**. The highlighted note icon indicates an existing note.
4. You can read a note by simply clicking next to the user status.



Forward calls during a break

If you need to step away from the desk, simply select the **Away from desk** toggle at the bottom-left corner of the app. Select to forward calls temporarily to an auto attendant, ring group, or call queue. When you return, simply disable this option.



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