

# 8x8 Virtual Office Phone System Setup Guide



May 2013

Effective May 10, 2013, the **Privileges** tab in the top navigation bar of the Account Manager was renamed **My Account**. Privileges and User Profiles can now be found in the **My Account** tab.

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## Introduction

Now that you've activated your phones (see the [Preparing Your Network and Installing Your Phones](#) guide), the next step in setting up your new 8x8 phone service is to log into your online 8x8 Account Manager. The 8x8 Account Manager is the simple way for phone system administrators to manage their company's 8x8 Virtual Office phone system.

Using the 8x8 Account Manager, phone system administrators can perform tasks such as:

- Creating and editing User Profiles
- Assigning users, configuring and managing extensions
- Managing phone system features such as the Auto Attendant, Ring Groups, Music-on-Hold, and more
- Transferring phone numbers to 8x8 service
- Updating your payment methods
- Checking order status
- Opening and tracking support cases

## System Requirements

### Supported Operating Systems

- Windows® 7, Vista and XP
- Mac OS 10.5.4 (Leopard®) or newer

### Required Plug-ins

- Flash Player 10.0 or higher

### Supported Browsers

#### Microsoft Windows Environment

- Firefox 3.0 and higher
- Google Chrome 1.0 and higher
- Internet Explorer 7.0 and higher
- Opera 9.5 and higher
- Safari 4.0 and higher

#### Mac OS Environment

- Firefox 3.5 and higher
- Google Chrome 1.0 and higher
- Safari 3.0 and higher

#### Linux Environment

- Firefox 3.0 and higher
- Google Chrome 1.0 and higher
- Opera 9.5 and higher

### Required Firewall Ports

#### Firewall Ports to be Open

- 80 TCP (http)
- 443 TCP (https)

### Minimum System Requirements

#### Windows XP

- Pentium 4 1.3 GHz / AMD Athlon XP 1500+ or newer
- 512 MB of RAM

#### Windows 7 and Vista

- Pentium 4 1.3 GHz / AMD Athlon XP 1500+ or newer
- 1 GB of RAM

#### Mac

- Powercomputer G4/G5 or newer
- 512 MB of RAM

### Bandwidth Recommendations

- Cable modem, DSL or better
- Minimum: 1.5 Mbps down / 384 kbps up



## Login Procedure

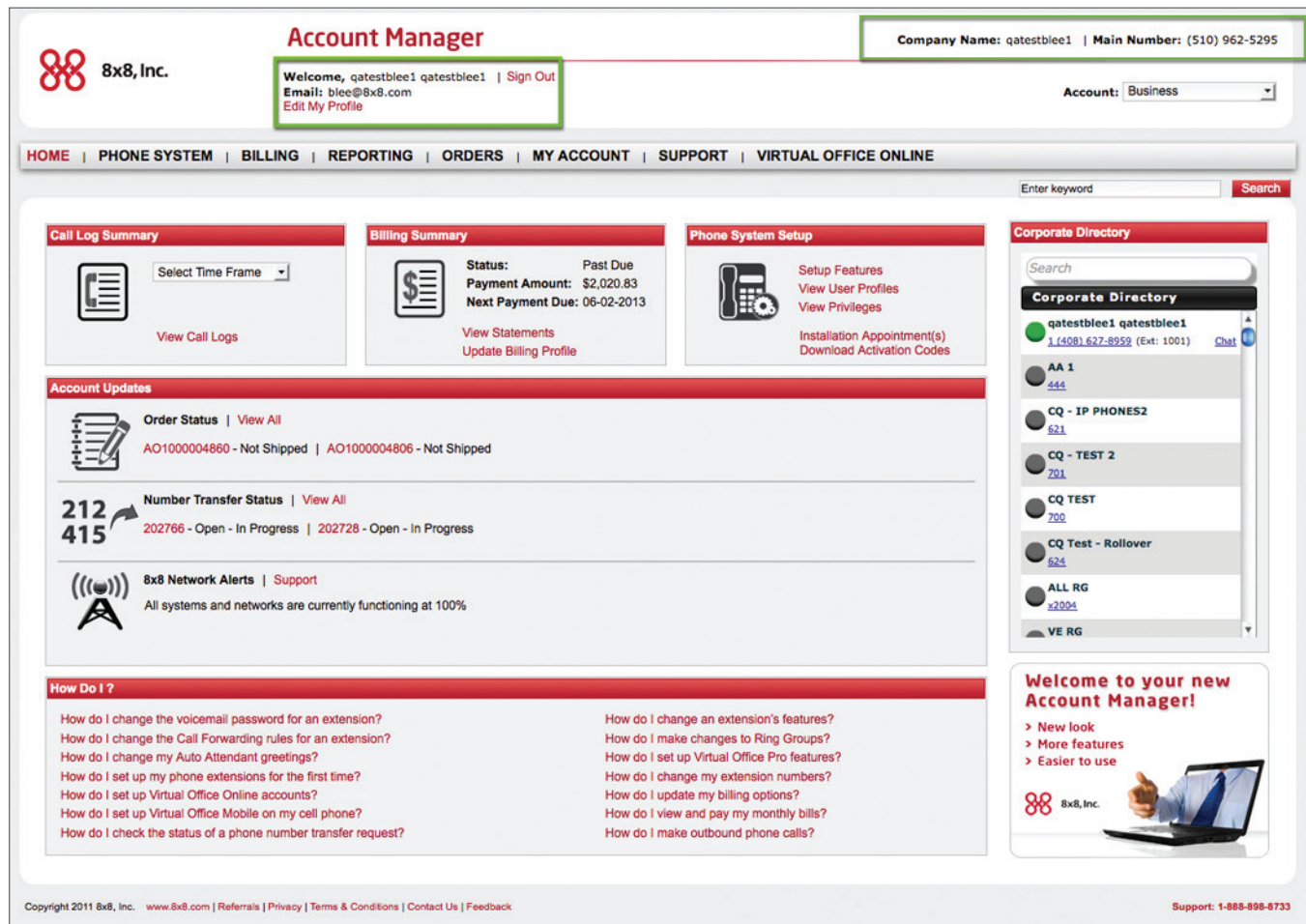
1. Go to [www.8x8.com](http://www.8x8.com).
2. Click **Sign-In**.
3. Select **Account Manager**.
4. Enter your 8x8 login and password.

The screenshot shows the 8x8, Inc. website homepage. At the top, the 8x8 logo and "8x8, Inc." are on the left. To the right are links for "Sales 1.866.879.8647", "Support 1.888.898.8733", and a "Sign In" button with a dropdown arrow. Below these is a green box labeled "Account Manager". A search bar is on the far right. A red "REQUEST A QUOTE" button with a "GO" arrow is also present. A navigation bar includes "HOME", "COMMUNICATIONS SOLUTIONS", "RESOURCES", "SUPPORT", and "ABOUT US". The main banner features a "#1 HOSTED VOIP PROVIDER" badge, an image of a man in a suit holding a large number 1, and text stating "Frost & Sullivan ranks 8x8 as the #1 provider of Hosted Business VoIP." with a "Read more" link. Below the banner, a section titled "Hosted Business VoIP Phone Service and More..." describes the services. To the right, a box highlights "8x8 Virtual Office Supports HIPAA/HITECH Compliance" with a medical symbol icon and a "Read the press release" link. At the bottom, there are five tiles: "HOME OFFICE" (Business phone service for the entrepreneur), "SMALL BUSINESS" (Advanced, reliable business phone service), "LARGE BUSINESS" (Unite multiple offices and remote locations), "Learn About Virtual Office" (with a video player icon), and "The Champion For Business Communications" (with the 8x8 logo icon). Each tile has a "Learn more" button.

## Account Manager Home Page

On the Account Manager home page your username and email address is displayed at the top center, your company name and main number is displayed in the top right corner.

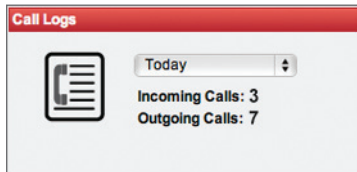
The home page provides a snapshot of your Virtual Office system. At a glance you can see the status of different tasks and select various options.



The screenshot displays the 8x8 Account Manager home page. At the top left is the 8x8 logo and "8x8, Inc.". The main header area includes a welcome message for user "qatestblee1" with email "blee@8x8.com" and links for "Sign Out" and "Edit My Profile". To the right, it shows the "Company Name: qatestblee1" and "Main Number: (510) 962-5295", along with an "Account: Business" dropdown. A navigation bar contains links: HOME, PHONE SYSTEM, BILLING, REPORTING, ORDERS, MY ACCOUNT, SUPPORT, and VIRTUAL OFFICE ONLINE. A search bar is located on the right. The main content area is divided into several sections: "Call Log Summary" with a "Select Time Frame" dropdown and a "View Call Logs" link; "Billing Summary" showing "Status: Past Due", "Payment Amount: \$2,020.83", and "Next Payment Due: 06-02-2013", with links for "View Statements" and "Update Billing Profile"; "Phone System Setup" with links for "Setup Features", "View User Profiles", "View Privileges", "Installation Appointment(s)", and "Download Activation Codes"; "Account Updates" with "Order Status" and "Number Transfer Status" sections, each with a "View All" link and specific update details; "8x8 Network Alerts" indicating 100% functionality; and a "How Do I?" section with various help topics. On the right side, there is a "Corporate Directory" with a search bar and a list of contacts including "qatestblee1 qatestblee1" and several extensions. At the bottom right, a "Welcome to your new Account Manager!" banner features the 8x8 logo and a list of benefits: "New look", "More features", and "Easier to use". The footer contains copyright information for 2011 8x8, Inc. and a support phone number: 1-888-898-8733.

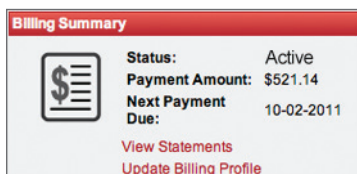
## Call Logs

Displays the number of incoming and outgoing calls based on the selected interval.



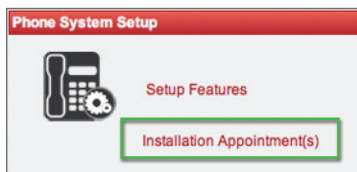
## Billing Summary

Summarizes your current charges for 8x8 Virtual Office phone service.



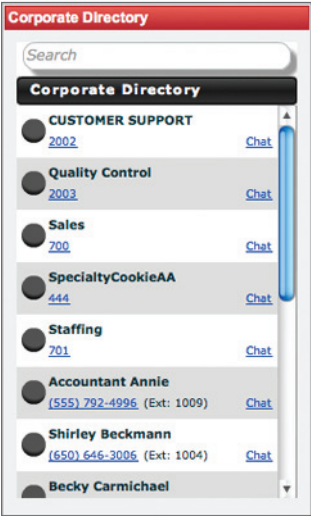
## Phone System Setup

When you first purchase 8x8 Virtual Office, an 8x8 technical installation representative will walk you through all your setup tasks over the phone. If you do not have a scheduled appointment and need assistance you can request an appointment. To schedule or view appointment details, click **Installation Appointment(s)**.



## Corporate Directory

All your numbers in one convenient location. You're able to easily search for users' contact information, detect users' presence or availability and call or chat with users.

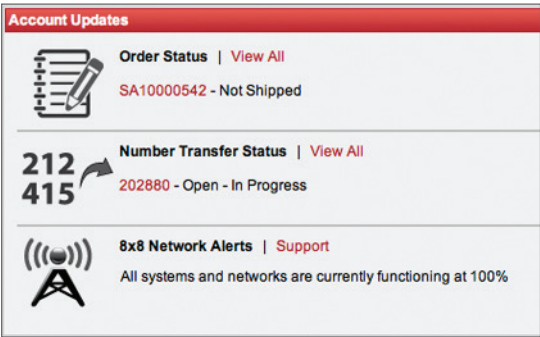


## Account Updates

**Order Status** provides the status of orders placed in the last 30 days at a glance. To view the status of earlier orders, click **View All** and then select or search for the desired order.

**Number Transfer Status** displays pending number transfer requests. To view the status of all number transfers, click **View All**.

**8x8 Network Alerts** displays information about any 8x8 system or network updates.



## How Do I?

Quick access to popular Help topics. You can also access help information using the **Help** link at the top of each page.

How Do I ?	
How do I change the voicemail password for an extension?	How do I change an extension's features?
How do I change the Call Forwarding rules for an extension?	How do I make changes to Ring Groups?
How do I change my Auto Attendant greetings?	How do I set up Virtual Office Pro features?
How do I set up my phone extensions for the first time?	How do I change my extension numbers?
How do I set up Virtual Office Online accounts?	How do I update my billing options?
How do I set up Virtual Office Mobile on my cell phone?	How do I view and pay my monthly bills?
How do I check the status of a phone number transfer request?	How do I make outbound phone calls?

## Configuring Your 8x8 Phone Service

Most systems can be set up in 3 steps:


1. Phone System Setup
  - Initiating number transfer
  - Activating phones and creating User Profiles
  - Assigning users, and configuring extensions
2. Routing Calls
  - Creating Ring Groups
  - Editing Virtual and Toll-Free Numbers (add-on option)
  - Setting up the Auto Attendant
3. Additional Features
  - Selecting your music and message on hold options

To get started, click **Setup Features** in the **Phone System Setup** box on the home page.

[HOME](#) | [PHONE SYSTEM](#) | [BILLING](#) | [REPORTING](#) | [ORDERS](#) | [PRIVILEGES](#) | [SUPPORT](#) | [VIRTUAL OFFICE ONLINE](#)

Home


Call Logs

 Today

Incoming Calls:

Outgoing Calls:

Billing Summary



Status: Demo/Trial


Payment Amount: \$521.14

Next Payment Due: 10-02-2011

[View Statements](#)

[Update Billing Profile](#)

Phone System Setup




[Setup Features](#)

Installation Appointment(s)

## Phone System Setup

### Number Transfer

With 8x8, you can transfer your existing phone numbers to your new 8x8 Virtual Office phone service. Using the Account Manager, you can check the status of numbers being transferred, continue or cancel current number transfer requests and begin the number transfer process for additional phone numbers.

 **8x8, Inc.**

**Account Manager**

Company Name: Specialty Cookies | Main Number: (650) 646-3006

Welcome, Specialty Cookies | [Sign Out](#)  
Email: sbiederman@8x8.com  
[Edit My Profile](#)

Account: Business


[HOME](#) | [PHONE SYSTEM](#) | [BILLING](#) | [REPORTING](#) | [ORDERS](#) | [PRIVILEGES](#) | [SUPPORT](#) | [VIRTUAL OFFICE ONLINE](#)

Home > Phone System Setup

Enter keyword Search

**PHONE SYSTEM**

- > Extensions
- > User Profiles
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > Call Queues
- > Shared Lines
- > Switchboard
- > Overhead Paging
- > Company Settings
- > Number Transfer


 Phone System Setup


**Phone System Setup** [Help](#)


To activate your phone service, follow the steps below.  
Each button will take you to a configuration page for that feature. Please make sure to click on Activation Complete to access all the features of your Account Manager.

[View Installation Appointments](#)


**Step 1 - Phone System Setup**


**Number Transfer**  
212 415  
[Manage](#)


**Extensions**  
[Manage](#) [Order](#)


**Virtual Office Online Profiles**  
[Manage](#)


**Step 2 - Call Routing**

**Shared Lines**  
[Manage](#) [Order](#)


**Ring Groups**  
[Manage](#) [Order](#)


**Call Queues**  
[Manage](#) [Order](#)


**Auto Attendant**  
[Manage](#) [Order](#)

**Virtual Numbers & Toll-Free Numbers**  
[Manage](#) [Order](#)

**Step 3 - Additional Features**

**Music On Hold**  
[Manage](#)

**Overhead Paging**  
[Manage](#) [Order](#)

**Switchboard**  
[Manage](#) [Order](#)

## Request a Number Transfer

To request a number transfer:

1. Click **Phone System** on the top navigation bar
2. Under the **Phone System** menu on the left, click **Number Transfer**. You are now on the Number Transfer main page.
3. Click **Print Number Transfer Checklist** and review instructions to ensure you have all required information ready before you start the number transfer process.

The screenshot shows the 8x8 Account Manager interface. At the top, the header includes the 8x8 logo, the text "Account Manager", and user information: "Company Name: Specialty Cookies | Main Number: (650) 646-3006". Below this, a navigation bar contains links: HOME, PHONE SYSTEM (highlighted with a green box), BILLING, REPORTING, ORDERS, PRIVILEGES, SUPPORT, and VIRTUAL OFFICE ONLINE. A sub-navigation bar shows "Home > Phone System > Number Transfer". On the left, a sidebar menu lists various phone system features, with "Number Transfer" at the bottom highlighted by a green box. The main content area is titled "Number Transfer" and features a "Number Transfer Request" table with columns for Date Started, Status, and Action. The table shows a single entry for "09-13-2011 02:23 AM GMT" with a status of "Pending" and actions "Cancel | Continue". Below the table is a "BEGIN NUMBER TRANSFER >" button. A message states: "Ready to transfer your phone numbers? To save time, please have the following information ready. Be sure to read the 8x8 Number Transfer Checklist before you begin." Below this message is a printer icon and a "PRINT NUMBER TRANSFER CHECKLIST >" button. To the right, there is a "Check Number Transfer Status" section with a "CHECK TRANSFER STATUS >" button and a paragraph of instructions. At the bottom left, a "Before you begin:" section includes a note about gathering phone bills.

Date Started	Status	Action
09-13-2011 02:23 AM GMT	Pending	Cancel   Continue

4. When you have gathered all required information, click the **Begin Number Transfer** button.



5. Answer the four questions on the **Begin Number Transfer** page.
6. Click **Continue**.

7. Enter the number of service locations for the phone numbers.

To continue, click **Next**.

**Note:** At any time if you want to complete the number transfer request later, click **Save for Later**.

**Number Transfer**Help

Step 1:  
Service Locations & Numbers

Step 2:  
Review Information

Step 3:  
Authorize Transfer

Step 4:  
Confirmation

**Determine How Many Service Address Locations**

Service addresses are the actual location of physical phone lines or the billing address(es) for mobile/cell and toll-free accounts.

You will have an opportunity to add or remove locations later.

Number of service address locations \* 1

< Back

Next > Save for later Cancel Request

8. Enter the service address and service provider information for the number you want to transfer.

To continue, click **Next**.

**Service Location: Enter Service Address and Service Provider Information**

Please enter the service address **exactly** as it appears on your bill. P.O. box addresses are not allowed.

Location 1 of 1

☒ Business ☐ Residential

\*How many providers are there for this location 1

\* Company Name

\* Authorized -First Name

\* Authorized -Last Name

\* Service Provider Select

\* Billing Telephone

\*Street Number

Pre Directional

\*Street Name

Post Directional

Street Name Suffix

Location Type

Unit Suit #

\*City

\*State

\*Postal Code



Next > Save for later Cancel Request



9. Enter or cut and paste the numbers you want to transfer.

**Note:** you must separate the numbers with commas, tabs or line breaks.

To continue, click **Next**.

10. Click the **drop-down arrow** to select a temporary number for each of the numbers you are transferring. Use the  and  buttons to add and delete phone numbers.

To continue, click **Next**.

11. Review the information you provided to ensure it is correct. To edit any of the information, click **Back**.

To continue, click **Next**.

12. Review the **Letter of Authorization** carefully. We recommend you print it for your records using the provided button. If you agree to all terms in the letter, click **I Agree**.

**Electronic Signature**

I, **SPECIALTYCOOKIES** by clicking on the I Agree button below, agree to the terms of this Letter of Authorization to Change Carriers.

Signature : SpecialtyCookies

Date : Tue Sep 13 09:59:30 PDT 2011

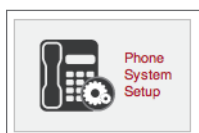
< Back

I Agree >

Save for later

Cancel Request

Click the **Phone System** icon to return to the Phone System Setup page



## User Profiles

A User Profile is required to give a user access to your 8x8 system. A User Profile must be created before assigning a user to an extension or granting administrative privileges to your Account Manager.



You only need to create one User Profile per individual. A User Profile can be assigned to multiple extensions or features. It is important that a user's profile remains current, especially the user's email address. The following User Profile fields are mandatory:

- First Name
- Last Name
- Email Address
- Username **Note:** When creating a new User Profile, by default the Username is the email address. The system administrator has the flexibility to change the Username to something other than the email address.

In addition to the above mandatory fields, the following fields are available and can be used or not used at the phone system administrator's discretion:

- Nickname- When this field is used, the nickname replaces the first name
- Job Title
- Department
- Location
- 3 customizable fields

## Using the User Profile Configuration Tool

1. Click **My Account** on the top navigation bar.
2. Click **User Profiles**
3. To hide or unhide available User Profile fields in the User Profile chart, click **Edit Viewable/Hidden Fields**
4. Check or uncheck the fields to display
5. Click **Save**

### Customizable Fields

Phone system administrators can create up to three customizable fields.

To use the customizable field(s):

- Click **Edit Viewable/Hidden Fields**
- Check the box next to a **Custom Field**
- Name the field by typing in the adjacent **Header Label** box
- Click **Save**

### Create and Edit User Profiles

You can create User Profiles one at a time or in bulk.

To create an individual User Profile:

1. Click **Create New User Profile**
2. Enter user information. Mandatory fields are: **First Name**, **Last Name**, **Email Address** and **User Name** (by default User Name is email address).
3. Click **Save**

**Note:** For phone extensions that will not be assigned to a specific individual but instead will be located in a specific area like the front lobby, conference room, etc., create a User Profile for each area. Example: Enter "Front" as a First Name and "Lobby" as the Last Name, and enter the email address for the person responsible for maintaining the extension settings (usually the Primary System Administrator)

To edit a User Profile, click **Edit** in the Action Column for the User Profile you want to edit.

To create or edit multiple User Profiles:

1. Click **Download CSV Template**

**Note:** If using customizable fields, before downloading the template make sure that you have labeled the field by following the **Customizable Fields** instructions above.

2. Download and open the file
3. Enter information for new User Profiles or edit information for current profiles.

**Important:** Do not make any changes to the 8x8 Internal ID column

4. Once you have made all your changes save the file to your computer hard drive

5. On the **User Profile** page click **Upload CSV Template**, then **Proceed**
6. Click **Add**, then locate the file you just saved and click **Open**, then **Upload**
7. Verify that the new information is correct and then click **Submit**



### Disabling a User Profile

To disable a User Profile click **Disable** in the **Action Column**. Disabling a User Profile will remove the profile from all extensions or features the User Profile has been assigned to. (Caution: Once a User Profile has been disabled you can enable it once again. However, you will manually have to reassign the User Profile to an extension or other feature.) To maintain historical reporting, you are unable to delete a User Profile completely from your system.

### Assigning a User to an Extension

If you have not already installed and activated your phones, please see the [Preparing Your Network and Installing Your Phones guide](#). To assign a user to an extension, you must first create a User Profile. Once the User Profile is created:



1. Click **Phone System** on the top navigation bar
2. From the Phone System home page click **View All Extensions**
3. Click the **Edit** link next to the extension you want to edit
4. You are now on the **Edit Extensions** landing page. Use the **Expand**  and **Collapse**  icons to view and edit the Extension Information pane
5. Click **Select User Profile** link
6. Click the **Select** link next to the User Profile you want to assign to the extension
7. You can continue to configure the extension using the **Configure Individual Extension** directions below or click **Save** at the bottom of the page to update user profile assignment.

To remove a User Profile from an extension, click **Clear User Profile**. Clearing a User Profile will reset the extension back to the default unassigned state. **Note:** clearing a User Profile only removes the user from the extension and the User Profile will still be active and available to other features that it is assigned to. To disable a User Profile and to remove it from all your system features, see **“Disabling a User Profile” on page 16** in the User Profile section of this guide.

## Configuring Extensions

If you have not already installed and activated your phones, please see the [Preparing Your Network and Installing Your Phones](#) guide. To begin configuring your extensions, click **Manage** on the **Extensions** box.



You can configure extensions one at a time or multiple extensions simultaneously. Configurable features are as follows:

Feature	Description
External Caller ID First Name	Name displayed for outgoing calls
External Caller ID Last Name	Name displayed for outgoing calls
Voicemail Password	Voicemail password to access the extension's voicemails
Time Zone	For phone display and voicemail timestamp
E911 Service Address	Provides a specific address for emergency response teams when the user dials 911
Allow International Calls	If selected, extension user can make international calls
Hide in Auto Attendant Directory	If selected, the extension will not be listed in the Auto Attendant when callers access the corporate directory or dial-by-name option
Allow Music-on-Hold Selection	If selected, users can choose their own Music-on-Hold from the music library
Allow Social Networking	If selected, allows users to communicate with Facebook and Twitter contacts
Permanent Caller ID Blocking	If selected, outbound calls display as anonymous (for individual extensions only)
Enable Inbound Caller ID	If selected, the phone displays the name and number of the inbound caller (for individual extensions only)
Display Number for Outgoing Calls	Phone number displayed on outgoing calls

## Configuring Individual Extensions

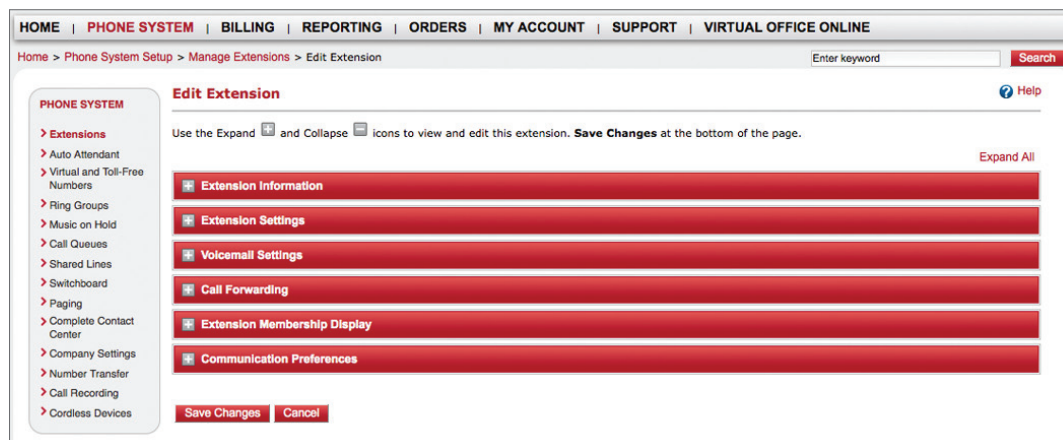
Selecting and editing individual extensions is available through Manage Extensions.

Once you have selected a User Profile for an extension, you can continue configuring the extension using the steps below.

Use the **Expand**  and **Collapse**  icons to view and edit the following panes:

**Note:** the panes displayed will vary depending on whether the selected extension is Basic, Virtual, Fax, Shared, Unlimited, Unlimited Pro, etc. If you are editing a shared extension, see the Shared Lines section for additional details.

- Extension Information
- Extension Settings
- Voicemail Settings
- Virtual Office Pro Information
- Call Forwarding
- Extension Membership Display
- Communication Preferences



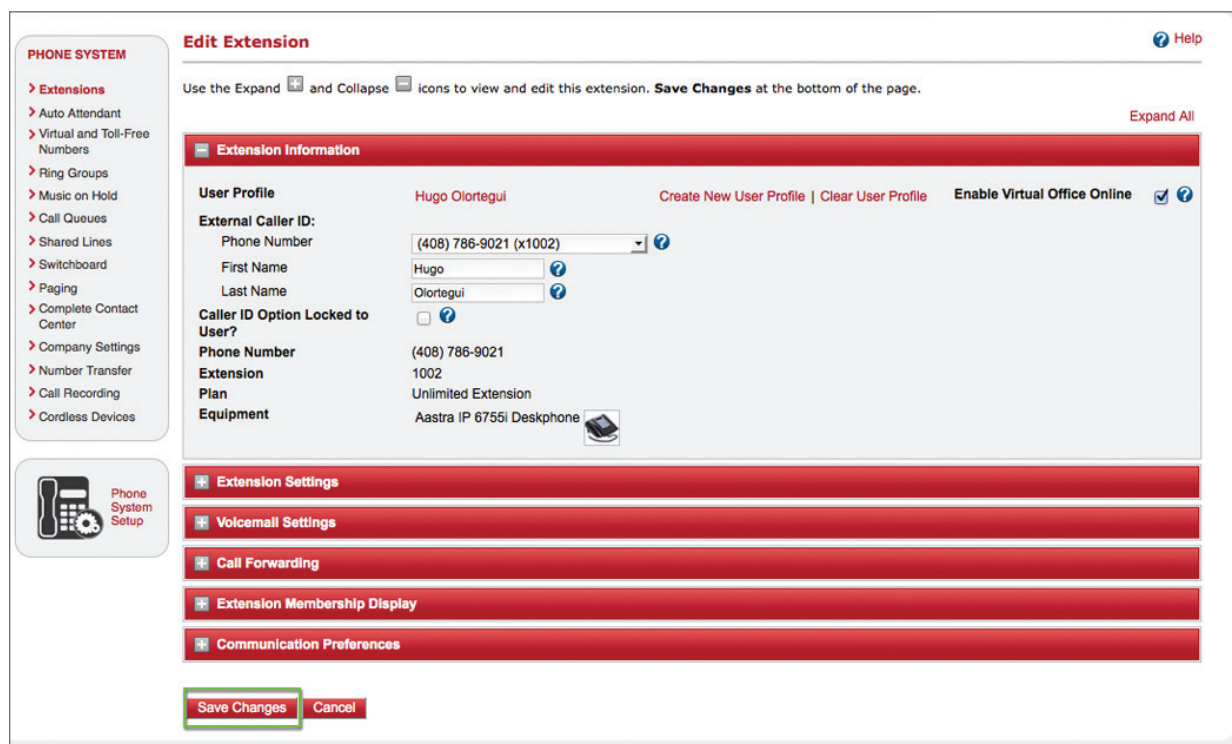
## Enabling/Disabling Virtual Office Online

By default Virtual Office Online is enabled for all unlimited, global and metered Virtual Office extensions. Virtual Office Online and Virtual Office Desktop are web-based tools that allow extension users to manage and use their phone features online, including accessing the corporate directory and call forwarding settings, from any computer. A username and password is required to log into these features.

## Extension Information

The Extension Information pane lets you assign a User Profile to an extension, enable or disable Virtual Office Online and edit extension caller ID settings.

1. Click the **Expand**  icon to display the **Extension Information** pane.





**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > Call Queues
- > Shared Lines
- > Switchboard
- > Paging
- > Complete Contact Center
- > Company Settings
- > Number Transfer
- > Call Recording
- > Cordless Devices

**Phone System Setup**

**Edit Extension** [Help](#)

Use the Expand  and Collapse  icons to view and edit this extension. **Save Changes** at the bottom of the page. [Expand All](#)

**Extension Information**

**User Profile** Hugo Olortegui [Create New User Profile](#) | [Clear User Profile](#) **Enable Virtual Office Online** ☒ [?](#)

**External Caller ID:**

Phone Number (408) 786-9021 (x1002) [?](#)

First Name Hugo [?](#)


Last Name Olortegui [?](#)

**Caller ID Option Locked to User?** ☐ [?](#)

**Phone Number** (408) 786-9021

**Extension** 1002

**Plan** Unlimited Extension

**Equipment** Aastra IP 6755i Deskphone 

**Extension Settings**

**Voicemail Settings**

**Call Forwarding**

**Extension Membership Display**


**Communication Preferences**

**Save Changes** **Cancel**



2. Enter, select or deselect these options for individual extensions:
  - Assign User Profiles
  - Extension Caller ID Phone Number
  - External Caller ID First Name
  - External Caller ID Last Name
  - Time Zone
3. Click **Save Changes** at the bottom of the screen.

## Extension Settings


In this pane, you can configure extension settings including time zone, e911 service address and calling options.


1. Use the Expand  icon to display the **Extension Settings** pane
2. Enter, select, or deselect the following:
  - Time Zone
  - Preferred Codec
  - E911 Service Address
  - Allow International Calls
  - Hide in Auto Attendant Directory
  - Allow Music On Hold Selection
  - Allow Social Networking
  - Enable Inbound Caller ID
  - Permanent Caller ID Blocking
  - Display Number for Outgoing Calls
3. Click **Save Changes** at the bottom of the screen











**Edit Extension**? [Help](#)


Use the Expand  and Collapse  icons to view and edit this extension. **Save Changes** at the bottom of the page.


[Expand All](#)


 **Extension Information**


 **Extension Settings**

<b>Time Zone</b>	<input type="text" value="US/Pacific"/>	<b>Disable outbound calling</b>	<input type="checkbox"/>	 <b>View Billing Statements</b>	<input type="checkbox"/>	
<b>Preferred Codec</b>	<input type="text" value="G.722 (90 kbps)"/> 	<b>Travelling Outside the US and Canada</b>	<input type="checkbox"/>	 <b>Allow International Calls</b>	<input checked="" type="checkbox"/>	
<b>E911 Service Address</b>	<input type="text" value="2125 ONEL DR, SAN JOSE, CA 95131-2032"/> <a href="#">Edit</a>	<b>Hide in Auto Attendant Directory</b>	<input type="checkbox"/>	 <b>Allow Social Networking</b>	<input checked="" type="checkbox"/>	
		<b>Allow Music on Hold Selection</b>	<input type="checkbox"/>	 <b>Enable Inbound Caller ID</b>	<input type="checkbox"/>	
		<b>Permanent Caller ID Blocking</b>	<input checked="" type="checkbox"/>			

 **Voicemail Settings**

 **Call Forwarding**

 **Extension Membership Display**

 **Communication Preferences**

**Save Changes**

**Cancel**



## Voicemail Settings

In this pane, you can edit the extension's Voicemail Password, and set up email notification options.

**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > Call Queues
- > Shared Lines
- > Switchboard
- > Paging
- > Complete Contact Center
- > Company Settings
- > Number Transfer
- > Call Recording
- > Cordless Devices

**Edit Extension** [Help](#)

Use the Expand and Collapse icons to view and edit this extension. **Save Changes** at the bottom of the page. [Expand All](#)

**Extension Information**

**Extension Settings**

**Voicemail Settings**

**Voicemail Password**  [?](#)

**Voicemail Notification Via Email**  [?](#)

**Voicemail-to-Email Address**  [?](#)

**Call Forwarding**

**Extension Membership Display**

**Communication Preferences**

**Save Changes** **Cancel**



You can update the following items:


- Voicemail Password. (*Passwords must be numeric digits only*)
- Voicemail Notification via Email
  - **Disabled** will deactivate this feature
  - **Enabled with Audio**: sends email notification of voicemail messages with an attached audio file
  - **Enabled**: sends email notification of voicemail messages only
- Voicemail-to-Email Address. (This is the email address where users will receive notification of voicemail messages)


## Virtual Office Pro Information


If you are updating an extension with Virtual Office Pro, you will configure **Call Recording** and **Internet Fax** in this pane.


**Edit Extension** [? Help](#)


Use the Expand  and Collapse  icons to view and edit this extension. **Save Changes** at the bottom of the page. Expand All


 Extension Information


 Extension Settings

 Voicemail Settings

 **Virtual Office Pro Information**

 Call Forwarding

 Extension Membership Display

 Communication Preferences

**Call Recording**  
Call Recording Mode  
Play announcement when calls are recorded  
Allow user to purchase additional dial-in numbers for Virtual Meeting

Off ▾  
Record On-Demand ▾  
☒ To Me ☒ To Other Party  
☒ Yes ☐ No [?](#)

**Internet Fax Numbers**  
[Select Fax Number](#)  
Virtual Meeting (556) 197-0028



**Save Changes** **Cancel**


1. Select your preferred options for the individual extension:
  - Call Recording
  - Call Recording Mode
  - Play announcement when calls are recorded
  - Allow user to purchase additional dial-in numbers for Virtual Meeting.  
**Note:** these can be domestic, international, or toll-free numbers
  - Choose Internet Fax numbers for their Virtual Office Online account
2. Click **Save Changes** at the bottom of the screen.


## Call Forwarding


As the phone system administrator you can setup the extension's call forwarding rules, or the extension user can do it themselves in Virtual Office Online.


**Edit Extension** [Help](#)


Use the Expand  and Collapse  icons to view and edit this extension. **Save Changes** at the bottom of the page. Expand All


 Extension Information


 Extension Settings

 Voicemail Settings

 Virtual Office Pro Information

 Call Forwarding

 Extension Membership Display

 Communication Preferences

Order Index	Forward Type	Forward to Auto Attendant	Forward to Voicemail	Forward to One Number Access	Forward to External or Extension	Phone Number	Delay (Seconds)
1	Always Forward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2	Busy Forward	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
3	No Answer Forward	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		15
4	Internet Outage Forward	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

## Phone System Administrator Call Forwarding Basic Setup

Call forwarding allows you to create rules to determine when and where calls should be forwarded, if the extension is busy or the phone is not answered. Important terms to be familiar with:

- **Forward to Auto Attendant:** calls are answered by the Auto Attendant. Callers can select from available options, such as "press 1 to leave a message; press 0 to reach an operator."
- **Forward to Voicemail:** callers are forwarded to voicemail, where they will hear a greeting and/or be able to leave a message.
- **Forward to One Number Access (ONA):** calls can be forwarded to one or up to four destinations either sequentially or simultaneously. If a call is not answered at any of the target destinations, it will then be forwarded to voicemail.
- **Forward to External Number or Internal Extension:** when you select this option, a field appears in the **Phone Number** column where you can enter the number you would like the calls forwarded to.

**Call Forwarding**

Order Index	Forward Type	Forward to Auto Attendant	Forward to Voice Mail	Forward to One Number Access	Forward to External or Extension	Number	Delay (Seconds)
1	Always Forward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2	Busy Forward	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
3	No Answer Forward	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		15
4	Internet Outage Forward	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

- **Sequential and Simultaneous Ring Distribution:** This sets how your forwarded calls will be distributed through your phone system. The “sequential” option rings selected phones one at a time based on the order you have listed. You can set the number of seconds the system will ring each phone. The “simultaneous” option rings all your selected phones at the same time.
- **Call Screening:** When call screening is enabled, the caller must record his/her name before the 8x8 system tries to locate you. You will then be able to listen to the name and have the option to answer the call or not. If you decline, the call will go to voicemail.

Ring Distribution		Call Screening	
<input checked="" type="radio"/> Sequential	<input type="radio"/> Simultaneous	<input type="radio"/> Disabled	<input type="radio"/> Enabled

Order Index	Number	Voice Mail Password Required	Ring for X Number of Seconds	
1	<input type="text"/>	<input type="checkbox"/>	20 <input type="text"/>	<input type="button" value="−"/> <input type="button" value="+"/>

1. Select the desired options for these call forwarding conditions:

- Always Forward

**Note:** if you select **Always Forward**, all other forwarding options will be disabled. To re-enable them, deselect this option.

- Busy Forward
- No Answer Forward

**Note:** you can also select a delay time, in seconds, for this feature. The default is 15 seconds.

- Internet Outage Forward

Call Forwarding							
Order Index	Forward Type	Forward to Auto Attendant	Forward to Voice Mail	Forward to One Number Access	Forward to External or Extension	Number	Delay (Seconds)
1	Always Forward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2	Busy Forward	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
3	No Answer Forward	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		15 <input type="text"/>
4	Internet Outage Forward	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

2. If you select **One Number Access**:

- Select whether the Ring Distribution will be **Sequential** or **Simultaneous**.
- Select whether Call Screening will be **Disabled** or **Enabled**.
- Enter the first number where your calls will be forwarded

**Note:** The number could be a phone number, extension number, ring group number, call queue number etc.

- Click the **Add +** button to enter more phone numbers.
- Select the **Voicemail Password Required** checkbox if you want to ensure that only you can answer forwarded calls at the target destinations

**Note:** selecting this option means you must enter your voicemail password before you can answer the call.

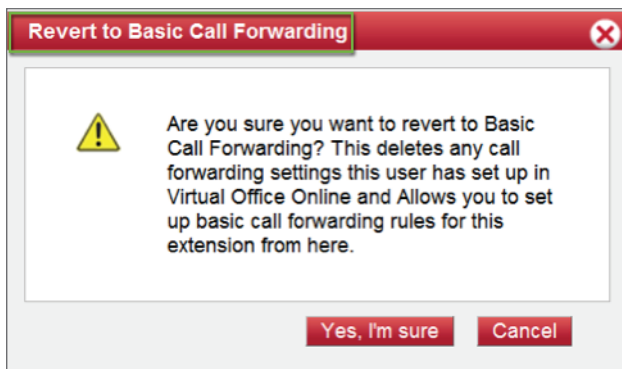
- Enter the number of seconds the phone will ring before forwarding to the next destination or to voicemail. The default is 20 seconds.

## Extension User Call Forwarding Basic Setup

Users can set up their own call forwarding rules in their Virtual Office Online accounts. When you, as a phone system administrator, use the Account Manager to edit an extension that already has call forwarding rules, you can either click **Revert to Basic Call Forwarding** or **Manage Call Forwarding**.



**Revert to Basic Call Forwarding:** Deletes the user's rules and allows you to set up basic call forwarding by following the steps in the Call Forwarding section.





**Manage Call Forwarding:** Allows you to log in as the user and manage rules using the advanced options in Virtual Office Online. See the [Virtual Office Online User Guide](#) for more information.

**Extension Membership Display:** This is a display-only information pane with no editable fields. It provides details about the extension's Auto Attendant, Call Queue (optional feature), and Ring Group settings.

Edit Extension

Help

Use the Expand  and Collapse  icons to view and edit this extension. **Save Changes** at the bottom of the page.

Expand All

Extension Information

Voicemail Settings

Virtual Office Online User Profile

Call Forwarding

Extension Membership Display

Communication Preferences

Service Membership	Service Name	Service Group Ext / Phone Number	Service Group Details	Goes to Voicemail
Call Queue	Staffing	701	Primary Extension	No
Ring Group	Quality Control	2003	Cyclic	No
Shared Lines		15557983628	Line 3	No
		16506463020	Line 4	No

Save Changes

Cancel

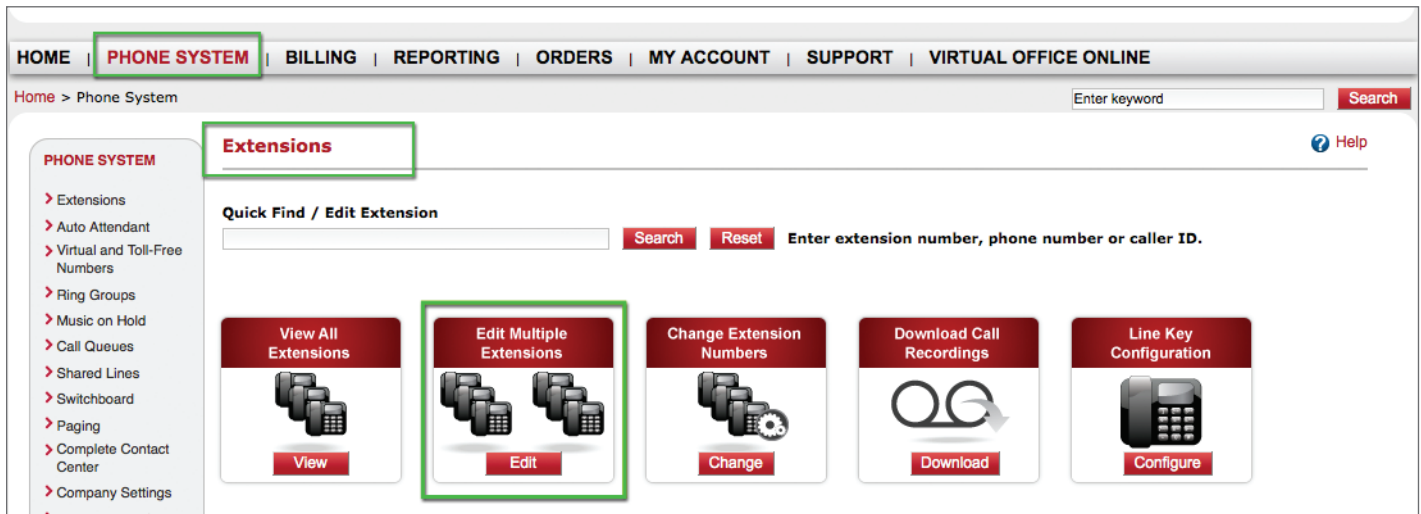
Once you are finished with your edits, click **Save Changes**,

Click the **Phone System** icon to return to the Phone System Setup page



### Editing Multiple Extensions Simultaneously:

1. Click **Phone System** on the top navigation bar.
2. Under **Manage Extensions**, click **Edit Multiple Extensions**.



3. Using the gray navigation bar, configure the following options for all extensions, as desired.
  - Caller ID First Name
  - Caller ID Last Name

Edit Multiple Extensions <span>Help</span>									
Edit extensions as needed and click <b>Save</b> .									
Ext	Phone Number	User First Name	User Last Name	Caller ID First Name	Caller ID Last Name	Voice-mail-to-Email Address	Disable outbound Calling	Hide in Auto Attendant	
				<input type="text"/>	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	
1001	(408) 627-8959	qatestblee1	qatestblee1	qatestblee1	qatestblee1	blee@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	
1002	(408) 786-9021	Hugo	Olorategui	Hugo	Olorategui	hugo.olorategui@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	
1003	(408) 786-9106	Unassigned	Unassigned	Beth	Carney	hugo.olorategui@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	
1004	(408) 786-9050	qatestblee1	1004	qatestblee1	1004	bud.lee@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	
1005	(408) 786-9051	Unassigned	Unassigned	qatestblee1	1005	blee@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	
1006	(408) 786-9121	Unassigned	Unassigned	qatestblee1	1006	blee@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	
1007	(408) 786-9161	Unassigned	Unassigned	qatestblee1	1007	blee@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	
1008	(408) 786-9026	qatestblee	softalk	qatestblee1	1008	blee@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	
1009	(319) 538-0821	Unassigned	Unassigned	qatestblee1	1009	blee@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	
1010	(408) 463-6210	qatestblee1	1010	qatestblee1	1010	blee@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	
1011	(408) 786-9128	qatestblee1	1011ST	qatestblee1	1011	blee@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	
1012	(555) 180-0211	Unassigned	Unassigned	qatestblee1	1012	blee@8x8.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1013	(408) 463-6184	qatestblee1	1013ST	qatestblee1	1013	blee@8x8.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1014	(801) 849-9724	Unassigned	Unassigned	qatestblee1	1014	blee@8x8.com	<input type="checkbox"/>	<input type="checkbox"/>	

- Voicemail Password
  - Enter Voicemail-to-Email address individually. (Note: voicemail email notifications will be sent to this address.)
  - Hide in Auto Attendant
  - Make International Calls
  - Allow Social Networking
  - Music on Hold
  - Display Number for Outgoing Calls
  - Time Zone
  - E911 Service Address
4. After entering a name or password, click the checkbox to apply the change to the entire column.
  5. Click **Save** to apply your changes.

**Note:** There are additional extension features that can be configured by the phone administrator or by the individual extension user.

## Email Notification to Extension Users

Once you assign a user to an extension, an email is automatically sent to the user with information regarding their new extension.

- **First-time extension users** with Virtual Office Online enabled also receive instructions for creating their login password.
- **First-time extension users** who do not have Virtual Office Online enabled receive an email alert but are not instructed to create a password. (Admins have the option to disable access to Virtual Office Online.)
- **Existing extension users** who already have a username and password to your PBX should use their existing credentials to log into the new extension.



## Call Routing

### Ring Groups

Ring Groups enable multiple extensions to answer incoming calls. To create a Ring Group, click **Manage** on the Ring Group icon



Or click **Ring Groups** in the **Phone System** menu on the left.


This takes you to the **Ring Group** main page.

#### Create Ring Groups

1. Click **Create Ring Group**.

Ring Groups <span>Help</span>					
Ring Groups allow you to group a number of extensions together to share distribution of incoming calls					
		<a href="#">Create Ring Group</a>		<a href="#">Delete All Ring Groups</a>	
Ring Groups	Group Extension	Incoming	Extensions		Action
<b>CUSTOMER SUPPORT</b> Ring Pattern: Cyclic No of Cycles: 3 Busy Forward: 555 Voice Mail No Answer Forward: 555 Voice Mail Always Forward:	2002		Shirleyp Beckmannp	1004	<a href="#">Edit</a> <a href="#">Delete</a>
			Ron Nader	1007	
			Becky Carmichael	1002	
<b>Quality Control</b> Ring Pattern: Cyclic No of Cycles: 1 Busy Forward: 444 Auto Attendant No Answer Forward: 444 Auto Attendant Always Forward:	2003		Lobby Manager	1001	<a href="#">Edit</a> <a href="#">Delete</a>
			Specialty Cookies	1006	

2. Enter a Ring Group Name and select a Ring Group Extension.

**Note:** if you would like Virtual Office to suggest an extension number for the Ring Group, click the  icon next to Ring Group Extension.

**Create Ring Group**Help


Please enter your new Ring Group information below.

**Ring Group Details**

Ring Group Name

Ring Group Extension

2004



Ring Pattern

Cyclic

Number of Cycles

1

If ring group has no open lines, forward call to

Auto Attendant Ext 444


If ring group cannot answer the call, forward call to

Auto Attendant Ext 444

after 30 sec(s).

Always Forward call to

VoiceMail Password





**Ring Pattern**


**Cyclic** pattern is also known as roll over and allows equal distribution of calls, making sure all extensions in the Ring Group get their turn in answering the calls. You can choose how many times the call cycles through the extensions before sending it to voicemail.

**Cyclic Repetitive** pattern distributes calls among all extensions in the group in the same order that the extensions are listed. Each new call starts at the first extension in your list. You can choose the number of times the call cycles through the extensions before sending it to voicemail.

**Simultaneous Ring** rings all extensions in the group at the same time. The first extension to pick up the phone will answer the call.

**Ring Group Extensions :**

Use the  and  buttons to Add/Delete extensions to this Ring Group

List Order	Ring Group Extension	Add/ Delete
1	<div></div>	

Update List Order

Save

Cancel

## Add Extensions to a Ring Group

1. On the **Ring Groups** main page, select the group you want to add an extension to and click **Edit**.

Ring Groups <span>Help</span>				
Ring Groups allow you to group a number of extensions together to share distribution of incoming calls				
		<a href="#">Create Ring Group</a>   <a href="#">Delete All Ring Groups</a>		
Ring Groups	Group Extension	Incoming	Extensions	Action
<b>CUSTOMER SUPPORT</b> Ring Pattern: Cyclic No of Cycles: 3 Busy Forward: 555 Voice Mail No Answer Forward: 555 Voice Mail Always Forward:	2002		Shirleyp Beckmannp 1004	<a href="#">Edit</a> <a href="#">Delete</a>
			Ron Nader 1007	
			Becky Carmichael 1002	
<b>Quality Control</b> Ring Pattern: Cyclic No of Cycles: 1 Busy Forward: 444 Auto Attendant No Answer Forward: 444 Auto Attendant Always Forward:	2003		Lobby Manager 1001	<a href="#">Edit</a> <a href="#">Delete</a>
			Specialty Cookies 1006	

2. On the **Edit Ring Group** page, under **Ring Group Extensions**:
  - Click the **drop-down arrow** to select an extension number.
  - Click the **+** and **-** buttons to add and delete extensions.

**Ring Group Extensions :**

Use the **+** and **-** buttons to Add/Delete extensions to this Ring Group



List Order	Ring Group Extension	Add/Delete
1	Shirleyp Beckmannp (650) 646-3006 Ext 1004	<b>+</b> <b>-</b>
2	Ron Nader (408) 627-8740 Ext 1007	<b>+</b> <b>-</b>
3	Becky Carmichael (650) 646-2988 Ext 1002	<b>+</b> <b>-</b>







[Update List Order](#)

[Save](#) [Cancel](#)

3. To change the order in which incoming calls are routed, use the list order field:
  - Enter a number in the **List Order** field next to each extension. The number entered is the chronological order that the call will be routed to each extension.
  - Click **Update List Order**.

**Ring Group Extensions :**

Use the  and  buttons to Add/Delete extensions to this Ring Group

List Order	Ring Group Extension	Add/ Delete
3	Shirley Beckmann (650) 646-3006 Ext 1004	 
2	Maresh Swami (650) 646-2992 Ext 1003	 
1	Becky Cullen (650) 646-2988 Ext 1002	 

**Update List Order**

4. Choose Ring Pattern: Cyclic, Cyclic Repetitive or Simultaneous

**Ring Group Details**

Ring Group Name: DESK PHONES

Ring Group Extension: 2001

Ring Group Caller ID: Ring Group Name and Caller's Number ?

Ring Pattern: Cyclic

Number of Cycles: 1

Voicemail Password: 1122 ?

If all lines are busy, forward immediately to: Voicemail Ext 555

If no one in ring group answers, forward call to: Voicemail Ext 555 after 15 sec(s).

Immediately Forward Calls to: None ?

**Ring Pattern**

**Cyclic** pattern is also known as roll over and allows equal distribution of calls, making sure all extensions in the Ring Group get their turn in answering the calls. You can choose how many times the call cycles through the extensions before sending calls to your no answer destination.

**Cyclic Repetitive** pattern distributes calls among all extensions in the group in the same order that the extensions are listed. Each new call starts at the first extension in your list. You can choose the number of times the call cycles through the extensions before sending calls to your no answer destination.

**Simultaneous Ring** rings all extensions in the group at the same time. The first extension to pick up the phone will answer the call.

5. Click **Save** at the bottom of the page.

Click the **Phone System** icon to return to the Phone System Setup page.



## Virtual and Toll-Free Numbers

A Virtual Phone Number is a secondary number that when called, rings to a selected extension, Ring Groups, Call Queues or Auto Attendants and are not attached to physical phones or devices. They work just like email address aliases. In the same way that you can have more than one email address point to the same email account, you can have more than one 8x8 virtual phone number link to the same destination. Behind the scenes, the 8x8 Call Routing Network points your virtual number calls to your chosen destination. This transfer is just as fast and seamless as any other 8x8 phone call.

Virtual Phone Numbers can be from most area codes in the US and can be used by businesses to save their customers long distance charges by providing a phone number in their local area code. In addition, virtual phone numbers allow businesses to show a local presence in a geographic area without physically residing there. Virtual numbers are also useful in marketing campaigns, allowing you to direct calls from certain telephone numbers to specific extensions or ring groups.

Click **Manage** in the **Virtual Numbers & Toll-Free Number** box to edit any virtual and toll-free numbers you purchased. By default your virtual and toll-free numbers have been routed to your Auto Attendant



1. Select the number you want to make changes to and click **Edit** to change the destination or service address for the phone number.

**Virtual and Toll-Free Numbers** [Help](#)

Virtual and Toll-Free numbers are secondary numbers that ring to an 8x8 extension and are not attached to a specific phone or device. By default numbers are directed to the Auto Attendant.  
Click Edit to change the destination of your virtual or toll-free number.

Number Type	Phone Number	Destination	Service Address	
Virtual Number	(510) 962-5321	Lobby Manager, Ext 1001 - (650) 646-3018	810 W MAUDE AVE SUNNYVALE CA 94085 -2910 USA	<a href="#">Edit</a>
Toll-Free Number	(866) 950-6772	Ext 444 - Auto Attendant	810 W MAUDE AVE SUNNYVALE CA 94085 -2910 USA	<a href="#">Edit</a>
Virtual Number	unassigned	unassigned		<a href="#">Edit</a>
Virtual Number	(556) 054-7455	Ext 444 - Auto Attendant	220 primrose DR san jose CA 95123 -4447 US	<a href="#">Edit</a>

[X](#) [+](#)

**Common Uses for Virtual and Toll-Free Numbers**

- Use as a main number that rings your auto attendant and routes callers to the right employee
- Establish a virtual presence in a specific market by obtaining a phone number with a local area code
- Toll-free numbers allow US callers to call you for free
- Use to track marketing campaigns

2. Click the **Destination** drop-down arrow to select a new destination.

3. Enter or select any changes to the service address in the appropriate fields.

**Note:** Fields marked with \* must be filled in.

4. Click **Confirm** to save your changes.

Edit Toll Free/Virtual Number

Please select the destination for this number

Number TypeVirtual Number

Phone(510) 962-5321

DestinationExt 1001 - Lobby Manager, (650) 646-3018

Change Service Address

Street Number\*810

Pre-DirectionalW - West

Street Name\*MAUDE

Street Name SuffixAvenue

Post-Directional

Secondary Location

Unit/Other

City\*SUNNYVALE

State\*CA

Zip Code\*94085

Zip+42910

Country\*United States

Confirm

Cancel

Click the **Phone System** icon to return to the Phone System Setup page

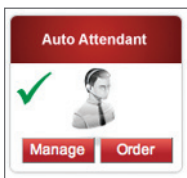
A square icon with a light gray background. On the left is a black telephone handset with a gear icon next to it. To the right of the icon, the text "Phone System Setup" is written in red, with "Phone" on the first line, "System" on the second, and "Setup" on the third.

34

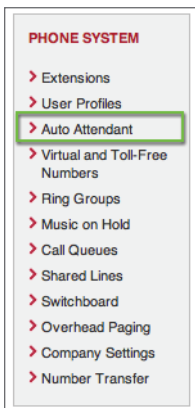
## Auto Attendant

Auto Attendant is a service that acts as an automated receptionist and processes your incoming calls. Callers are able to self-direct their call by choosing menu options. An Auto Attendant gives you flexibility to manage a simple call flow or create a “large company” call flow to multiple departments and complex call trees. You set the rules, program which keys callers select to route themselves to the appropriate destination, and create the menu recordings. The 8x8 Auto Attendant also gives you the flexibility to create different call flow scenarios, and call profiles, based on day, date and time. Each 8x8 PBX phone system comes with one Auto Attendant identified as extension number 444. You also have the option of purchasing additional auto attendants.

To configure your Auto Attendant, click on the **Auto Attendant** box on the **Phone System Setup** page.



Or click **Auto Attendant** in the **Phone System** menu on the left.



## Create Auto Attendant Profile

By creating multiple profiles for Auto Attendant, your company can quickly switch between recordings and menu options based on different scenarios.

1. Click **Create Auto Attendant Profile**

The screenshot shows the Account Manager interface for Specialty Cookies. The top navigation bar includes links for HOME, PHONE SYSTEM (highlighted), BILLING, REPORTING, ORDERS, PRIVILEGES, SUPPORT, and VIRTUAL OFFICE ONLINE. The left sidebar lists various phone system features, with Auto Attendant highlighted. The main content area is titled 'Auto Attendant' and contains a table of existing profiles. A 'Create Auto Attendant Profile' button is visible in the top right of the table.

Auto Attendant Name	Numbers Pointing to Auto Attendant	Auto Attendant Extension	Auto Attendant Profiles	Last Modified Date/Time	Status	Actions
			SummerProfile	09-15-2011	On	Turn Off Edit Select
			FallProfile	09-08-2011	Off	Turn On Edit Select

2. Review the **Auto Attendant Profile Overview**, and complete the **Auto Attendant Worksheet**.

(Important Tip: Use the Auto Attendant worksheet before you begin configuring your Auto Attendant. The worksheet will help you outline how you want your inbound calls to be directed when they reach the Auto Attendant. Preparing beforehand will make this process a lot easier.)

The screenshot shows the 'Create Auto Attendant Profile' wizard. The 'Auto Attendant Profile Overview' screen displays a flowchart for configuring the auto attendant. The flowchart starts with 'General Auto Attendant Profile Info' and 'Hours of Operation' (Business Hours, Lunch Hours, Holiday Hours). It then branches into 'Rules and Greetings' (Business Hours, After Hours) and 'Optional' (Sub Menu(s) and Greetings, Lunch Hours, Holiday Hours). A 'Continue >' button is at the bottom right.



WORK SHEET



## Auto Attendant Worksheet

Use this worksheet to outline how you would like your inbound calls to be directed when they reach the Auto Attendant. Then use the online Account Manager to create your Auto Attendant.

### Normal Business Hours

What hours is your business open?

Day	Open Time	Close Time
Sunday		
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		

### Business Hours Rules and Greeting

How would you like incoming calls to be directed during business hours?

Your Business Hours rules/greetings will be played during your normal business hours. Each menu can use numbers 0 through 9, with 0 normally reserved for a live receptionist.

#### Business Hours Greeting Example:

*Thank you for calling Acme Corporation. For Technical Support, press 1; For Sales, press 2; For Finance, press 3; To Dial by Name press 4; For the Corporate Directory, press 5 or to speak with the Operator, press 0.*

Enter your script here:

Now outline your menu actions. You can have from one or up to ten options.

#### Rules Example:

Press	Description	Action
1	Technical Support	Transfer to Ring Group
2	Sales	Transfer to Ring Group
3	Finance	Transfer to Sub Menu
4	Dial by Name	Dial by Name
5	Corporate Directory	Corporate Directory
6		
7		
8		
9		
0	Operator	Transfer to Extension

3. Click **Continue**

**FYI:**

### About Auto Attendant Profiles

Use a profile to define how your auto attendant will behave when calls come in. A Profile lets you define phone menu options, business schedules, and recordings to create a complete set of instructions for your auto attendant. Within one profile, you can specify options for business hours, after-business hours, holidays and more.

### Why Create More Than One Profile?

Most businesses only need one auto attendant profile, however there are two common reasons for creating more:

- Stage and test new recordings, schedules and menu options before you push a completely new auto attendant live.
- Businesses may want different auto attendant behavior for different days of the week, days of the year like holiday, or seasons. Each profile can have completely different recordings, hours, menu options, etc. Just create a profile for each scenario and alternate between them as needed.

**Note:** Each Auto Attendant comes with a system default profile. This system default profile is overridden when you activate a new profile on your Auto Attendant.

4. Enter your **Profile Name** and **Time Zone**. Extension number 444 is reserved exclusively for your Auto Attendant.

Click **Next**

**Create Auto Attendant Profile**Help

Profile Information >


Hours of Operation >

Business Hours >

After Hours >

Lunch Hours >

Holiday Hours >

**Enter Your Auto Attendant profile Information**  
After entering the information below, click Next to proceed to the next step.

<b>Auto Attendant Name</b>	SpecialtyCookieAA
<b>Auto Attendant Extension</b>	444
<b>Profile Name</b>	<input type="text" value="Summer Profile"/>
<b>Time Zone *</b>	<input type="text" value="US/Pacific"/>

\* Required Field

Next >

Cancel

5. Choose whether you want to define your business hours or have the same phone menus and recordings all day, every day (24/7).
- If you chose **Define Business Hours** skip to **Define Business Hours** section
  - If you chose **24/7 Business Hours** click **Next** and proceed to **Step 6**

Create Auto Attendant Profile

Profile Information >

Hours of Operation >

Business Hours >

After Hours >

Lunch Hours >

Holiday Hours >

Auto Attendant

Extension

Profile Name

Time Zone

SpecialtyCookieAA

444

business hours

US/Pacific

Define Your Business Hours of Operation

Your Auto Attendant has five different scheduling options. Your schedule will determine which phone menu options and greetings your callers get when they call in. When complete, click **Next** to proceed to the next step.

Business hours

There are two types of business hours: Defining your business hours ( 8.00am - 5:00pm, Monday - Friday) or 24/7 business hours ( company does not close).

☒ Define Business Hours

☐ 24/7 Business Hours

Week Day	Business hours *		After hours *	
	Start Time	End Time	Start Time	End Time
Sunday	<input type="text"/>	<input type="text"/>		
Monday	08:00AM	05:00PM	05:01PM	07:59AM
Tuesday	08:00AM	05:00PM	05:01PM	07:59AM
Wednesday	08:00AM	05:00PM	05:01PM	07:59AM
Thursday	08:00AM	05:00PM	05:01PM	07:59AM
Friday	08:00AM	05:00PM	05:01PM	07:59AM
Saturday	<input type="text"/>	<input type="text"/>		

Note : Your after hours are the hours when you are not open and are defined from your business hours. They have been displayed for your convenience.

24/7 Business Hours:

6. Enter your phone menu rules:

- Under **Press**, click the drop-down arrow and select a key.
- Enter a **description** of the function that key will enable.
- Under **Call Routing**, click the drop-down arrow and select a function for the key you selected.

Press

Description

Call Routing

Key 9

Dial by Extension

Dial By Extension

- Click the button to add additional options for this menu or button to delete key settings.
- Use the **Menu Recording Script** box to draft the script for this menu recording. You will have the opportunity to record or upload your recording after the profile is created.

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- When you have finished configuring all your phone menu rules, click **Create Profile**.
- To **upload and create menu recordings** for your profile skip to the [Upload a Recording](#) and [Create Your Own Menu Recording](#) sections.

## Define Business Hours

Define Business Hours allows you to have separate menu options and recordings for normal business hours, non-business hours, lunch hour and holidays etc.


- Click the **drop-down arrows** to define your business hours for each day of the week.

**Note:** After hours are displayed automatically based on your business hours selections

**Create Auto Attendant Profile**Help

STEPS: [Profile Information](#) » [Hours of Operation](#) » **Business Hours** » [After Hours](#) » [Lunch Hours](#) » [Holiday Hours](#) » [Recordings](#)

Auto Attendant | Extension | Profile Name | Time Zone  
Specialty Cookies | 444 | | US/Pacific

 **Define Your Business Hours of Operation**  
Your Auto Attendant has multiple options for creating call flows based on day and time. Define your hours of operation below and then click **Next**.

**Business Hours**

To create separate menus and recordings for when your business is open and when it is closed, click Define Business Hours. To create menus and recordings to be used at all times, click 24/7 Business Hours.

**Note :** Editing your Business Hours will automatically change your After Hours. If your business is closed on a particular day, leave Business Hours blank. The system will automatically use your After Hours menus and recordings on these days.

☐ 24/7 Business Hours

☒ Define Business Hours



Week Day	Business Hours		After Hours	
	Start Time	End Time	Start Time	End Time
Sunday				
Monday	08:00AM	05:00PM	05:01PM	07:59AM
Tuesday	08:00AM	05:00PM	05:01PM	07:59AM
Wednesday	08:00AM	05:00PM	05:01PM	07:59AM
Thursday	08:00AM	05:00PM	05:01PM	07:59AM
Friday	08:00AM	05:00PM	05:01PM	07:59AM
Saturday				

**Lunch Hour (Optional)**

To create additional menus and recordings for a dedicated lunch period, enter hours below.



Week Day	Start Time	End Time
Sunday		
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		

**Business Hour Exceptions (Optional)**

Business Hour Exceptions allows you to temporarily modify the regular Business Hours defined above. Use the  and  buttons to add and delete exceptions.

Date	Start Time	End Time

**Holiday Hours (Optional)**

To create additional menus and recordings to be used when your business is closed for a holiday, enter dates below (example: Jan, 1, 2013, New Year's Day). Use the  and  buttons to add and delete Holidays.

Date	Description

< Back

Next > Cancel

- Optional: Enter hours and dates for **Lunch Hour**, **Business Hour Exceptions**, and **Holiday Hours**.

3. Click **Next**.
4. Enter your phone menu rules for **Business Hours**:
  - Under **Press**, click the drop-down arrow and select a key.
  - Enter a **description** of the function that key will enable.
  - Under **Call Routing**, click the drop-down arrow and select a function for the key you selected.

- Click the and buttons to add and delete key settings.
  - Use the **Menu Recording Script** box to draft the script for this menu recording. You will have the opportunity to create or upload a menu recording after the profile is created.
5. When you have finished configuring your Business Hours menu, click **Next**.
  6. As appropriate, repeat steps 1-4 above to configure menus for After Hours, Lunch Hours and Holiday Hours. When complete click **Create Profile**.

## Upload a Recording

Once you have created an Auto Attendant Profile you now can create or upload recordings for each menu.

To upload a recording, proceed to Step 1. To create a new menu recording skip to **Create Your Own Menu Recording**.

1. To upload an .au, .wav, .vox or .mp3 file from your computer:

- Click **Upload** under the appropriate menu

- Click the **Add** button.
- Select the audio file you want to upload.
- Click **Upload**

**Upload Recording**

**Accepted Formats** .au, .wav, .vox and .mp3  
**File Restrictions** Upload one file at a time; No larger than 10MB

**File Name**

Set this recording as Active ☒

**Electronic Signature**

By Clicking the "I Agree" button,

I, qatestblee2 qatestblee2, certify that the file I am uploading is not copyright protected. I certify that I have the right to use this file legally. In case the file is deemed to be in violation of US copyright laws, I will be held responsible. 8x8 will not in any way be responsible for copyright violation. By signing below, I will be taking full responsibility for any lawsuits regarding the file I am uploading and I will be held accountable in a court of law.

Date08-22-2012

I Agree Cancel

- Review the Electronic Signature text, and click **I Agree**.
- When the dialog box appears confirming that you have successfully uploaded the greeting, click **OK**.

2. To test your new recording and menu options, click the **Test Menu** icon and follow prompts. 

## Create Your Own Menu Recording

1. To record a menu:
  - Optional: Click **Edit/Print Script** under the appropriate menu heading to draft or edit a previously written script. Click **Print** to have a hard copy of the script available while you are recording your menu.
  - Click **Record**
  - Enter your 10-digit phone number and click **Start Recording**

**Record Custom Greeting**

You can record your greeting through your phone. Simply enter your 10-digit phone number and click **Start Recording**. When you are done, click **Done Recording** to **Stop recording** and hang up. You will then be taken back to the **Manage Greeting** section.

Enter Your Phone Number  -  -

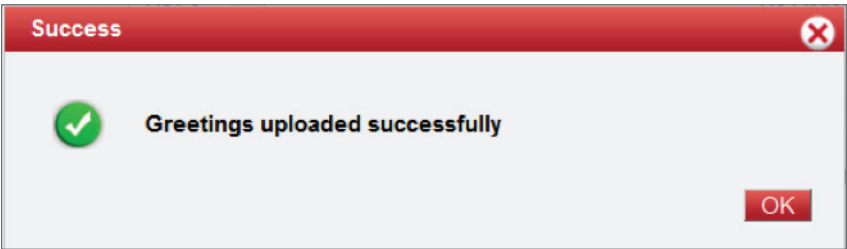
Numbers only  
Format : area code and phone number  
Example : 408 555 1212


Start Recording Done Recording Cancel

- When the dialog box appears confirming that the system is calling your phone number, click **OK**.

The system will call you at the number you entered. When the phone rings, answer it and follow the voice prompts to record your menu recording.

- Click **Done Recording** when you are finished.
- When the dialog box appears confirming that you successfully recorded your greeting, click **OK**.



2. To test your new recording and menu options, click the **Test Menu** icon and follow prompts. 

**Activating Your New Auto Attendant Profile**

1. Return to the main Auto Attendant page.
2. Locate the profile you created and edited in the list.
3. Click **Turn On** to activate your profile.

Auto Attendant Profiles	Last Modified Date/Time	Status	Actions		
Create Auto Attendant Profile					
SummerProfile	09-15-2011	On	Turn Off	Edit	Select
FallProfile	09-08-2011	Off	Turn On	Edit	Select
HolidayProfile	08-25-2011	Off	Turn On	Edit	Select

You have successfully configured your Auto Attendant.

Click the **Phone System** icon to return to the Phone System Setup page.



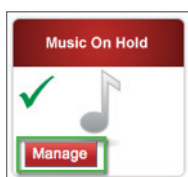
## Additional Features

### Music and Message on Hold

As an administrator, you can choose the default music for your phone system from 10 options provided by 8x8 or upload your own licensed music/message on hold, and manage the choices your extension users can select to customize their individual extensions. Extension users can make their selection by logging into their Virtual Office Online account.

**Note:** By default your phone system is preset to **Rites of Spring**.

From the **Phone System Setup** page, click the **Music on Hold Manage** button. This takes you to the **Music on Hold Library**.



1. Review the music listed. To hear a sample, click **Play**.
2. When you have made your selection, click **Select** in the **Status** column. Your selection will show a 🎵 icon in the Status column.

**Note:** Your selection becomes the default music for the phone system.

**Music on Hold Library** [Help](#)

Select hold music from 8x8's standard library or upload your own licensed file.

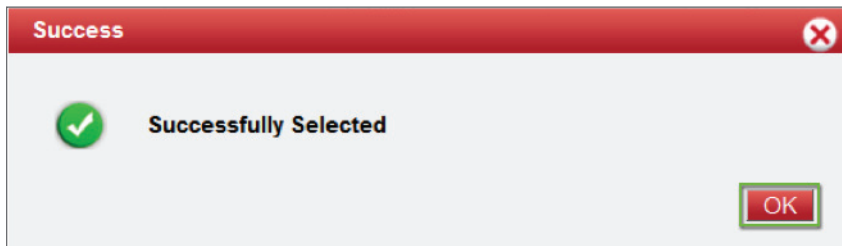
Upload New Music on Hold

File name	Standard/ Custom	File Size and Duration	Extensions Using	Status	Date Added	Extension User Access	Actions
Rites of Spring -Original	Standard	1.99MB 04:20	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Bright Vision -Contemporary	Standard	5.50MB 05:00	All	🎵	09-26-2011	<input checked="" type="checkbox"/>	Play
Groovin -Jazz	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Into the Blue -Contemporary	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Lift -Contemporary	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Port of Peace -Jazz	Standard	5.50MB 05:00	None	Select	09-26-2011	<input type="checkbox"/>	Play
Puesta Del Sol -Latin Jazz	Standard	5.53MB 05:00	None	Select	09-26-2011	<input type="checkbox"/>	Play
Smokey Joe -Country	Standard	5.50MB 05:00	None	Select	09-26-2011	<input type="checkbox"/>	Play
Smooth Character Moment -Jazz	Standard	5.44MB 05:00	None	Select	09-26-2011	<input type="checkbox"/>	Play
Vivaldi Four Seasons -Classical	Standard	5.50MB 05:00	None	Select	09-26-2011	<input type="checkbox"/>	Play
Jazz Music (Jazz).mp3	Custom	5.50MB 05:45	None	Select	08-29-2011	<input type="checkbox"/>	Play   Delete
Latin Music (Latin Jazz).mp3	Custom	5.53MB 05:47	1	Select	08-29-2011	<input type="checkbox"/>	Play   Delete
Jazz Music (Jazz).mp3	Custom	5.50MB 05:45	None	Select	08-29-2011	<input type="checkbox"/>	Play   Delete
CustomLift.mp3	Custom	2.75MB 05:51	None	Select	09-20-2011	<input type="checkbox"/>	Play   Delete

🎵 This is the default music on hold for extension users who have not selected their own music on hold



3. When the dialog box appears confirming your selection, click **OK**.



4. Click **Save**.

## Allowing Extension User Access

1. In order for extension users to access Music/Message On Hold in Virtual Office Online, you must check the **Music on Hold** box in their extension configuration settings. See the **Extension Configuration** section.
2. Check the **Extension User Access** box(es) to give users the choice of selecting that file.
3. Click **Save**

For instructions on uploading licensed music and message files and configuring advanced features like Shared Lines, Calls Queues, and Switchboard, see the [Account Manager User Guide](#).

## Account Manager Privileges and Roles

Other individuals can be given permission to access the Account Manager and assign him/her access to one or more of the following sections:

- Phone System
- Billing
- Reporting
- Orders
- Privileges
- Support Management

**Important!** Every phone system must maintain one designated primary administrator user account with privileges in all the above categories. This administrator's access **cannot** be edited or revoked.

The primary administrator and users with full privileges can access any administrative area. When a user with limited privileges logs into the **Account Manager**, they only have access to the areas you have granted permission. For example, an accountant who is only granted **Billing** and **Orders** privileges will see just those tabs in the Account Manager navigation bar.

## Add New Administrator

To grant administrator privileges to an individual, you must first create a User Profile for them. See the User Profile section for directions.

1. Click **My Account** on the top navigation bar.
2. Click **Privileges**.
3. To copy another administrator's privileges for the new administrator, click **Copy**.

To select the new administrator's privileges manually, click **Add New Admin**.

**Account Manager** Company Name: qatestblee1 | Main Number: (510) 962-5295

Welcome, qatestblee1 qatestblee1 | Sign Out  
Email: blee@8x8.com  
Edit My Profile

Account: Business

HOME | PHONE SYSTEM | BILLING | REPORTING | ORDERS | **MY ACCOUNT** | SUPPORT | VIRTUAL OFFICE ONLINE

Home > My Account > Admin Privileges

Enter keyword Search

**Admin Privileges** Help

Assign or update administrator privileges so others can access and manage this account.

**Add New Admin**

First Name	Last Name	Username	Phone System	Billing	Reporting	Orders	Privileges	Support Mgmt.	Actions
Bud	Lee	QATESTBLEE1.USER	✓	✓		✓	✓	✓	Edit Copy Revoke
Angela	York	AJYORKTEST			✓				Edit Copy Revoke
qatestblee1	1005	QATESTBLEE1.1005		✓		✓			Edit Copy Revoke
bud	lee	QATESTBLEE1.USERTEST	✓	✓	✓	✓	✓	✓	Edit Copy Revoke
Hugo	Olorategui	QATESTBLEE1.1002	✓		✓	✓	✓	✓	Edit Copy Revoke
qatestblee1	qatestblee1	QATESTBLEE1	✓	✓	✓	✓	✓	✓	Copy

4. Select a User Profile.

in Privileges > New Admin

Enter keyword Search

**Copy Admin Privileges** Help

To allow other people to view or manage this account, select a User Profile, then define which areas of this account they can access.

**User Profiles**

To assign administrator privileges to a user, select a user profile.

- ☐ Bud Lee
- ☐ Bud Email2
- ☐ qatestblee1 1042
- ☐ qatestblee1 1003
- ☐ blee DID3
- ☐ qatestblee1 1046
- ☐ qatestblee1 1047
- ☐ kenneth chang
- ☐ qatestblee1 1001
- ☐ Angela York
- ☐ test profile

**Account Manager Privileges**

Select the account privileges for this Admin.

- ☐ Select All
- ☒ Phone System Services
- ☒ Billing
- ☐ Reporting
- ☒ Orders
- ☒ My Account
- ☒ Support

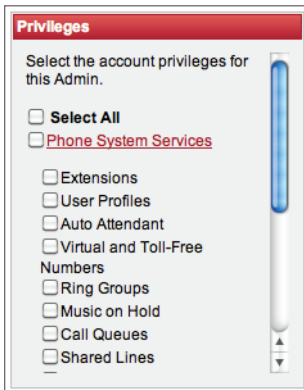
**PBX**

Apply the same admin privileges to these PBXs:

- ☒ qatestblee1

Copy Cancel

5. Select the administrative privileges for the user. By clicking on a link, like **Phone System Service**, more options specific to that function becomes available.



**Privileges**

Select the account privileges for this Admin.

☐ **Select All**

☐ **Phone System Services**

☐ Extensions

☐ User Profiles

☐ Auto Attendant

☐ Virtual and Toll-Free Numbers

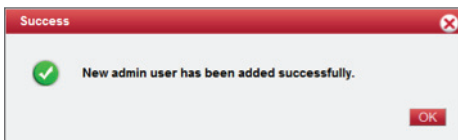
☐ Ring Groups

☐ Music on Hold


☐ Call Queues

☐ Shared Lines

6. If you have multiple PBXs, select which PBX these administrative privileges will apply to.
7. Click **Add**
8. When the dialog box appears confirming that the new administrator has been added, click **OK**.




**Success**

 New admin user has been added successfully.

**OK**

9. The new administrator now appears in the list of administrators on the main **Privileges** page.


**8x8, Inc.**

**Account Manager**

Company Name: qatestblee1 | Main Number: (510) 962-5295

Welcome, qatestblee1 qatestblee1 | [Sign Out](#)  
Email: blee@8x8.com  
[Edit My Profile](#)

Account: Business

[HOME](#) | [PHONE SYSTEM](#) | [BILLING](#) | [REPORTING](#) | [ORDERS](#) | [MY ACCOUNT](#) | [SUPPORT](#) | [VIRTUAL OFFICE ONLINE](#)

Home > My Account > Admin Privileges

Enter keyword Search

[Help](#)

**MY ACCOUNT**  
[User Profiles](#)  
[Privileges](#)

**Admin Privileges**

Assign or update administrator privileges so others can access and manage this account.

[Add New Admin](#)

First Name	Last Name	Username	Phone System	Billing	Reporting	Orders	Privileges	Support Mgmt.	Actions
Bud	Lee	QATESTBLEE1.USER	✓	✓		✓	✓	✓	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Revoke</a>
Angela	York	AJYORKTEST			✓				<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Revoke</a>
qatestblee1	1005	QATESTBLEE1.1005		✓		✓			<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Revoke</a>
bud	lee	QATESTBLEE1.USERTEST	✓	✓	✓	✓	✓	✓	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Revoke</a>
Hugo	Olortegui	QATESTBLEE1.1002	✓		✓	✓	✓	✓	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Revoke</a>
★ qatestblee1	qatestblee1	QATESTBLEE1	✓	✓	✓	✓	✓	✓	<a href="#">Copy</a>
qatestblee1	sefalk	QATESTBLEE1.1008	✓	✓	✓	✓	✓	✓	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Revoke</a>



NASDAQ: EGHT  
[www.8x8.com](http://www.8x8.com)

