8x8 Global Cloud Communications

8x8 Account Manager

Administrator Guide for Virtual Contact Center

Contents

Account Manager - What's New?

We have introduced the following enhancements and changes in this release:

- **Improved Service Address Management**: Previously, while assigning an emergency service address to extensions in bulk, you had to browse through duplicate and unused addresses. With this release we have cleaned up the address list as follows:
  - Unused emergency service addresses resulting from closed accounts and changed addresses are eliminated from the list.
  - Most duplicate addresses are removed.
- When editing a branch:
  - For a more robust caller experience, dedicate service extensions (Ring Groups, Call Queues, and Auto Attendants) to specific Branches and Cost Centers.
  - Ensure that service extension calls get a prompt live response by assigning receptionists to service extensions.
  - For easier extension management within a branch, you can see regular and service extensions that are assigned to your branch, as well as unassigned extensions that you can use.
- For quicker management of call park extensions, you can create and delete call park extensions in bulk.
- Control your security requirements by selecting the minimum password length required to access voicemail for regular and service extensions. Changes to the minimum password length take effect the next time the relevant passwords are changed.
- Streamline the contacts list by excluding service extensions from the Contact Directory.
- We have now introduced a dedicated option that controls the availability of the Virtual Office mobile app. Enable or disable the Virtual Office mobile app at extension level for all customers.
- For a clearer international calling experience, all phone numbers now follow the international E.164 phone number format.

Overview

Welcome to 8x8 Account Manager. 8x8 Account Manager is the simple way for phone system administrators to manage their company's 8x8 Virtual Office phone system from any desktop.

Using 8x8 Account Manager, phone system administrators can:

- Configure and manage extensions.
- Manage Virtual Office user profiles.
- Manage your phone system features such as Auto Attendant, Ring Groups, and Music on Hold.
- Transfer active phone numbers to 8x8 services.
- Manage your payment methods.
- Check order status.
- Open and track support cases.

System Requirements

You require the following systems to operate:

Supported Operating Systems

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

Required Plug-ins

Flash Player 10.0 or newer

Supported Browsers

The latest versions of the following browsers are recommended:

Microsoft Windows Environment	Mac OS Environment	Linux Environment
■ Firefox	■ Firefox	■ Firefox
■ Google Chrome	■ Google Chrome	■ Google Chrome
■ Internet Explorer 11	■ Safari	■ Opera
■ Opera		
■ Safari		

Required Firewall Ports

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

Minimum System Requirements

Windows XP	Windows 7 and Vista	Mac
■ Pentium 4 1.3 GHz/AMD Athlon XP 1500+ or newer ■ 512 MB of RAM	■ Pentium 4 1.3 GHz/AMD Athlon XP 1500+ or newer ■ 1 GB of RAM	■ Powercomputer G4/G5 or newer ■ 512 MB of RAM

Bandwidth Recommendations

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

Get Started

Once you log in to 8x8 Account Manager, you can edit your personal settings and begin to manage your tasks. For information on getting started with the application, refer to:

- Log In
- Edit My Profile
- Know the Interface

Log In

Logging in to 8x8 applications is quick and simple. You can log in using your 8x8 credentials or via single sign-on from your company's preferred identity management system:

- Log in using 8x8 username and password: Access all 8x8 applications you subscribe to using your 8x8 username.
- Log in using SAML SSO: Log in to 8x8 apps using your company's identity management system, such as Okta, Microsoft ADFS, or OneLogin, if enabled. Access all services available to you using your standard company login.
- Log in using Google SSO: Log in using your company Google Apps credentials to authenticate into 8x8 apps, if enabled. Access all services available to you using your standard company login.

Log in Using 8x8 Username and Password

1. Log in to Account Manager by going to http://login.8x8.com from your preferred browser.
2. Enter your 8x8 username and password, and click **Login**. The **Application Panel** opens. Select the desired application to launch.

If you wish to avoid entering the credentials every time you launch the application, select **Remember Me** in the login screen. The application remembers your password for automatic authentication every time you launch the application.

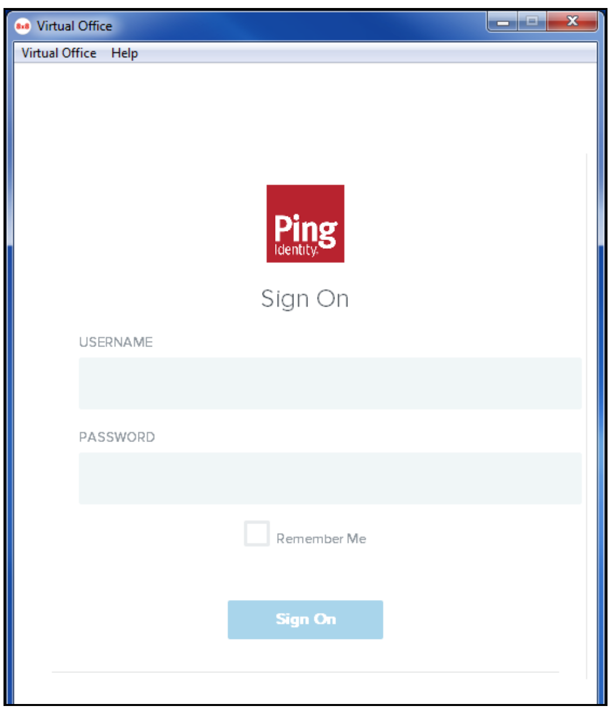
Log in Using SAML SSO

1. Launch Account Manager by going to http://login.8x8.com from your preferred browser.
2. In the login screen, click **Use Single Sign On**.

   The SSO login prompt opens.
3. Enter your 8x8 username or company email for validation.
4. Click **Continue** to view your SSO options.
5. From your options, select **Log in using SAML**.

Note: Clicking **Clear SSO Setting** takes you back to the first login page.

Your company's identity provider login page opens.



Note: If you log in using Okta or Centrify, the login page opens in a new browser tab instead of in the application window. Until you log in, the application window reads **Login from browser...**.

6. Enter the credentials to log in to the identity provider.
   The 8x8 application panel launches. Select the desired application to open.

Note: For consecutive SSO login sessions, you are routed from the custom login page (Step 5).

Log in Using Google SSO

1. Launch Account Manager by going to http://login.8x8.com from your preferred browser.
2. In the login screen, click **Use Single Sign On**.

   The SSO login prompt opens.
3. Enter your 8x8 username or company email.
4. Click **Continue** to view your SSO options.
5. From your options, select **Log in using Google**.

Note: Clicking **Clear SSO Setting** takes you back to the first login page.

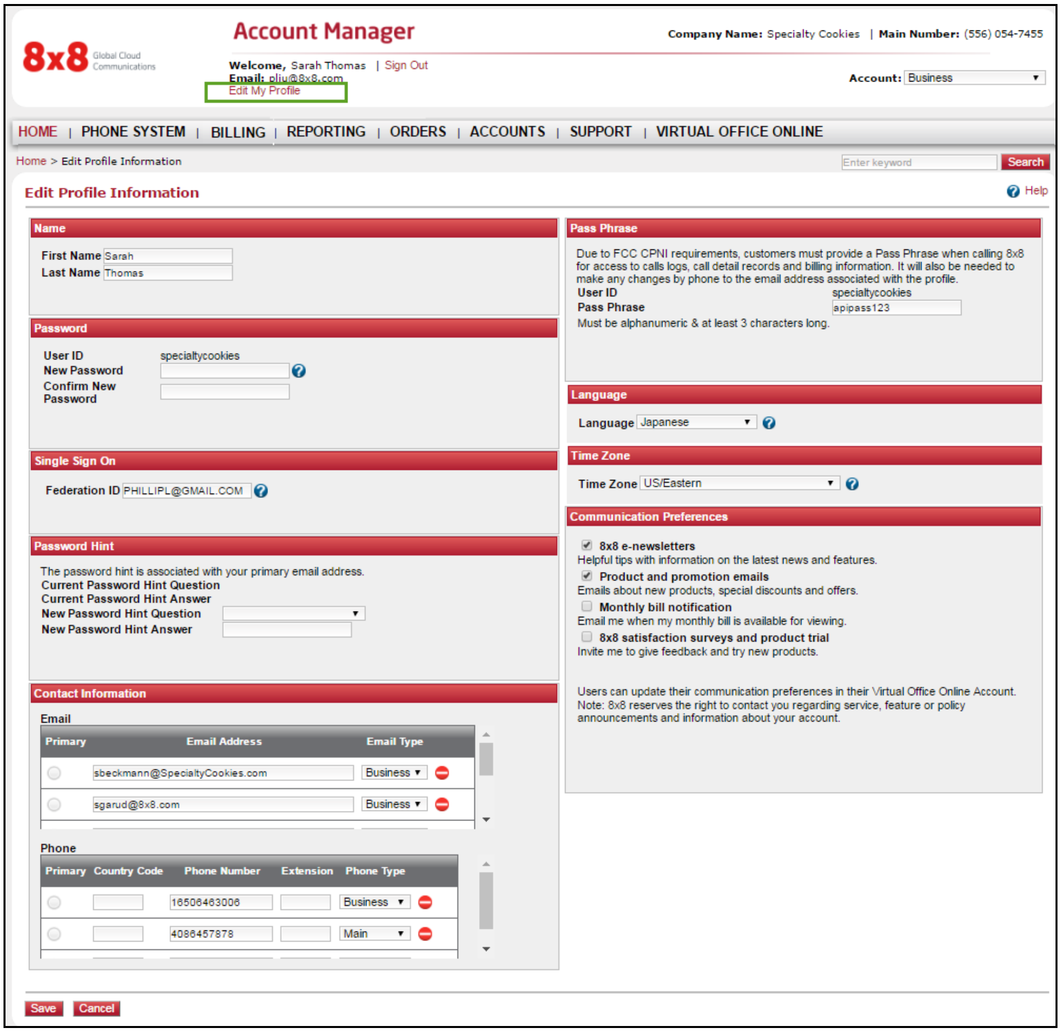
6. If prompted, enter your company Gmail address and password.
7. Click **Allow** to grant 8x8 single sign-on access to your Gmail profile.

   You are now authenticated to your 8x8 app. The Application Panel opens.

Edit My Profile

As an Account Manager primary administrator, you can edit your profile information, such as name, password, time zone, and communication preferences.

1. Click **Edit My Profile** at the top of the window.



2. Enter your **First Name**, **Last Name**, **New Password**, and **Confirm New Password**.

   Hover over  to learn the password requirements.

3. Enter the **Federation ID** if you are using SAML account.

   The Federation ID is used to map the SAML identity provider account to your 8x8 account.

4. Enter both **New Password Hint Question** and **New Password Hint Answer**.

   The password hint is associated with your primary email address.

5. Enter **Contact Information**.

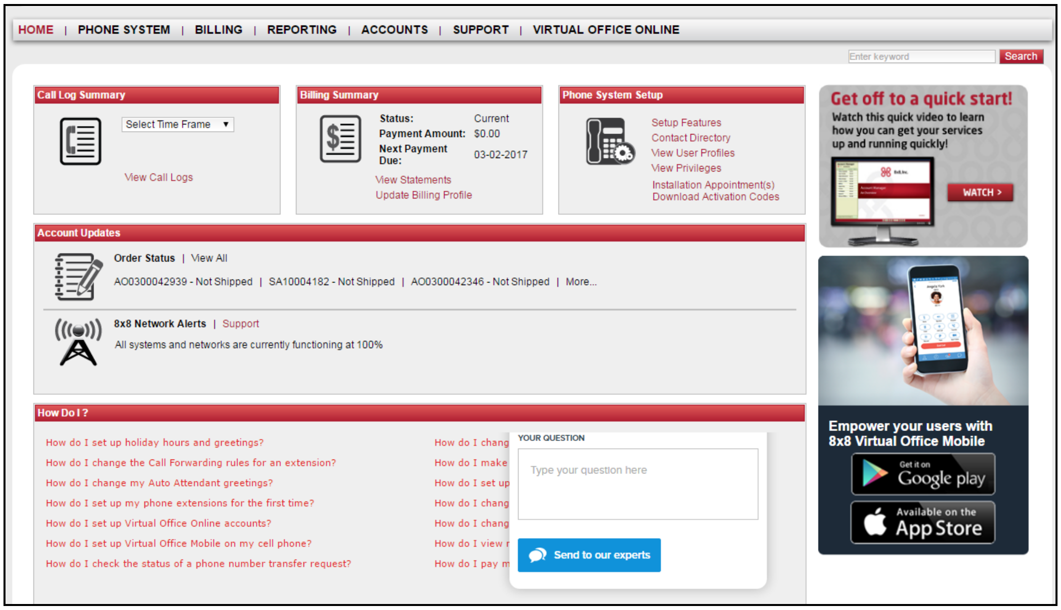
   Enter your primary email address and phone number.

6. Enter a **Pass Phrase**.
   You need to provide a pass phrase when calling 8x8 to make changes to your email address associated with the profile.
7. Select a **Language**.
   It determines the language of the email communications sent to the primary administrator such as password reset or account notifications.
8. Select a **Time Zone**.
   The time zone is used for call recording, call queues, and scheduling and running reports.
9. Enter your **Communication Preferences**, such as newsletters, product and promotion emails, bill notifications, and surveys.
   You can also update your communication preferences in your Virtual Office desktop app.

> **Note:** Only the primary administrator is able to receive billing notification emails. Secondary administrators (even those with billing privileges) do not have the option to receive billing notifications.

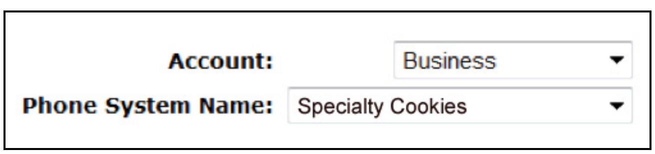
Know the Interface

The Account Manager home page provides a snapshot of your Virtual Office system. At a glance, you can schedule and see the status of tasks from support requests to number transfers.



Account Drop-Down Menu

If you have more than one type of 8x8 service, they are listed in the **Account** drop-down menu. Click the arrow and select **Business** to manage your 8x8 Virtual Office business phone system.



The drop-down can contain the following options:

- Business
- Virtual Office Solo
- Virtual Meeting
- Virtual Room

Phone System Name Drop-Down Menu

If your phone system has multiple PBXs, click the arrow to select which one you want to manage.

Note: If you have only one phone system, the drop-down does not display.

Call Log Summary

Displays the number of incoming and outgoing calls based on a selected time interval. Use the drop-down arrow to select:

- Today
- This week
- This month

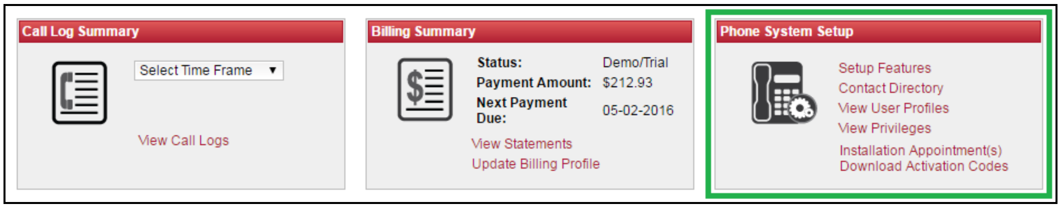
Billing Summary

Summarizes current charges for your 8x8 Virtual Office phone service, and provides links to your Billing Statements and Billing Profile.

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 did not have this appointment and need assistance, please schedule an over-the-phone installation appointment. To view details, schedule or reschedule 8x8 installation appointments, click **Installation Appointment(s)**.

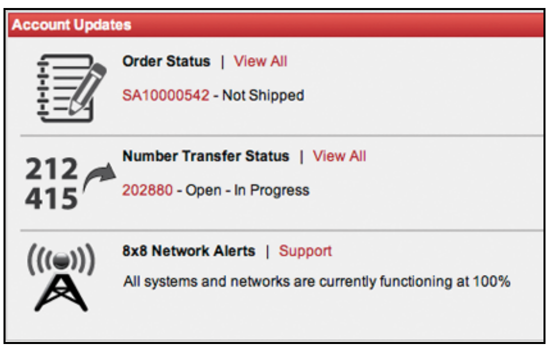
While ordering additional features, you may pause at any point during the order process. After pausing, just click **Continue Setup** to continue the order process from the point you last saved.



Account Updates

This is a snapshot of your account status. You can view:

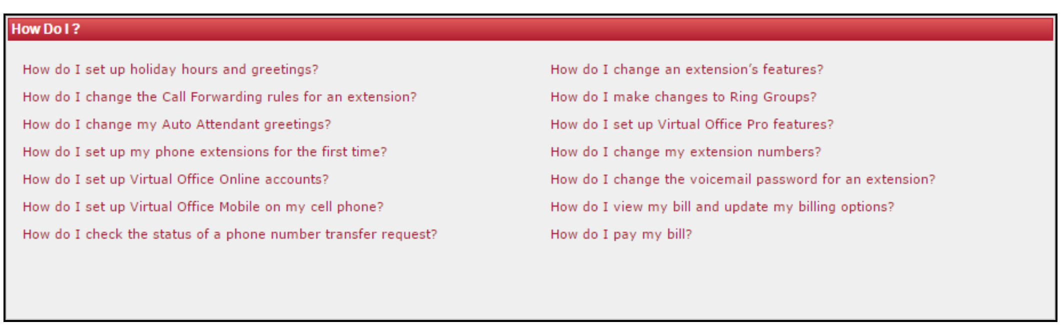
- **Order Status**: Shows the status of orders placed in the last 30 days. To view the status of earlier orders, click **View All** and then select or search for the desired order.
- **Number Transfer Status**: Displays pending number transfer requests. To view the status of all number transfers, click **View All**.
- **8x8 Network Alerts**: Displays information about any important 8x8 system or network updates. To contact 8x8 Support, click **Support**.



How Do I...?

These are links to top Help topics.

You can access these and additional help information using the **Help** link located on all Account Manager pages.



Set up Phone Systems

Setting up the phone systems involves configuring the extensions, creating users, assigning user to extensions, and setting up preferred features for extensions. Based on the phone system needs of your company, refer to the following topics:

- Manage Extensions
- Define Outbound Calling Options
- Manage Call Recording
- Create an Auto Attendant Profile
- Configure Company Settings
- Request Number Transfer
- Configure Virtual and Toll-Free Numbers
- Create Ring Groups
- Access Music on Hold
- Set up Group Paging
- Configure Voicemail and Fax Notifications
- Add-On Features

Manage Extensions

When you log in to Account Manager for the first time, you see one or more phone extensions that are provisioned by the 8x8 provisioning team for your business. To see phone extensions, go to **Phone Systems > View All Extensions**. The **Manage Extensions** page opens up. The phone extensions are not assigned to any users or user profiles yet. You must create a user profile and then assign the profile to the extension. To learn how to create a user profile, click here.

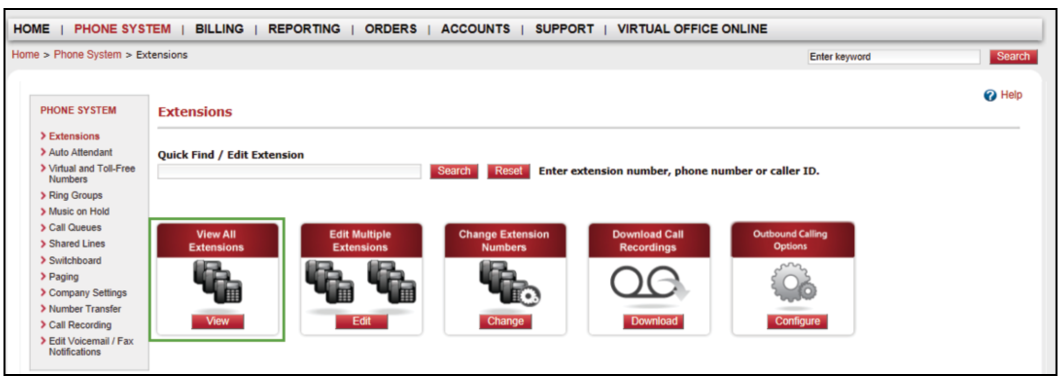
Use the Manage Extensions page to:

- Assign a user profile to an extension.
- Edit individual extensions.
- Edit multiple extensions.
- Change extension numbers.
- Reset extensions to their default settings.

Assign a User to an Extension

To assign a user to an extension, you must first create a **User Profile**. For details, refer to Create User Profiles.

1. Click **Phone System** on the top navigation bar.



2. From the **Phone System** page, click **View All Extensions**.
3. Click **Edit** next to the extension you want to edit.
4. You are now on the **Edit Extensions** landing page. Use **Expand** to view and edit the **Extension Information** pane.
5. Click the link next to **User Profile**.
   The **Select User Profile** window appears.

6. Find a user profile from the list and click **Select**.
   The user profile is assigned to the extension.

7. You can continue to configure the extension, or click **Save** at the bottom of the page to update user profile assignment.

To reset the an extension to its default settings but keep the User Profile assigned, click **Reset Extension**.

To remove a User Profile from an extension, click **Clear User Profile**. Clearing a user profile resets the extension back to the default unassigned state.

Note: Clearing a user profile only removes the user from the extension and the user profile is still active and available to other features that it is assigned to. For details on disabling a user profile and to removing it from all your system features, refer to Disable User Profiles.

Edit Individual Extensions

By editing an individual extension, you can view or configure:

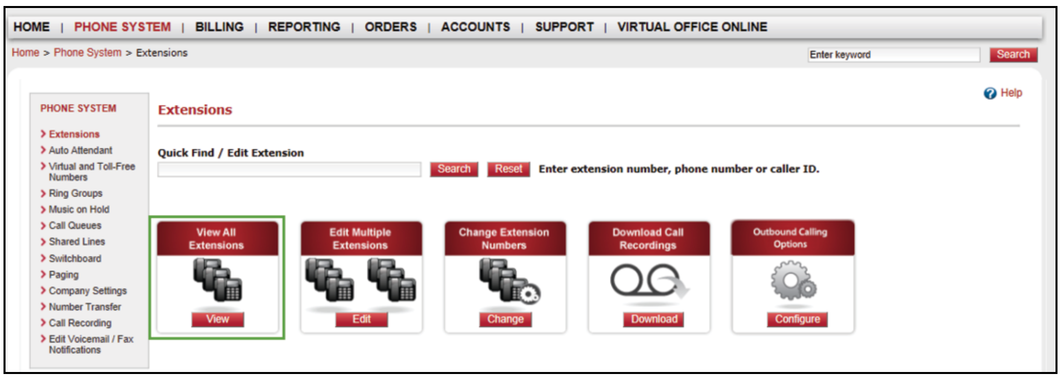
- External caller ID, phone number and extension, calling plan, type of phone equipment, and group paging.

Note: Phone numbers appear in the E.164 numbering format.

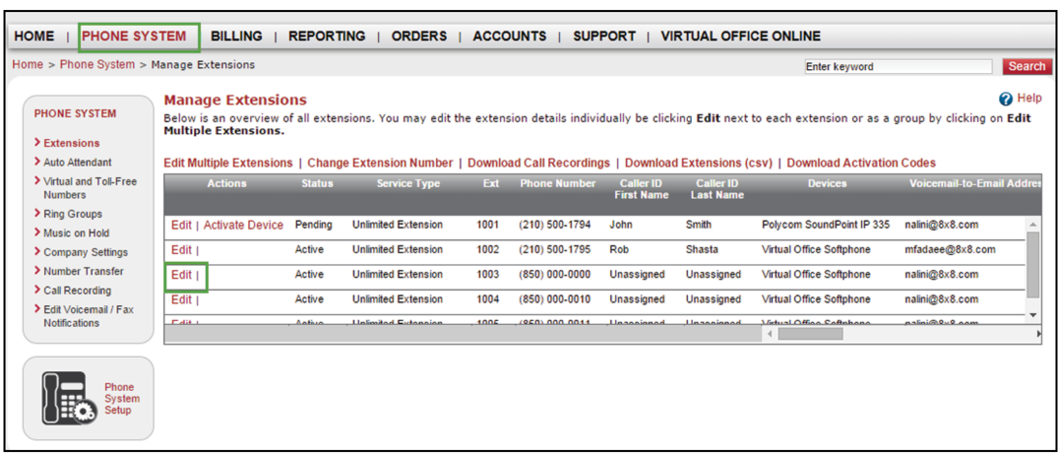
- Time zone, preferred Codec, emergency service address, calling options, Music on Hold selection, view billing statements, etc.
- Voicemail password, and email notification options.
- Call recording, fax notification, and Internet fax numbers.
- Call forwarding types and destinations.
- Membership information.
- Newsletters, product and promotion emails, surveys, and monthly bill notifications.

To access an Individual Extension:

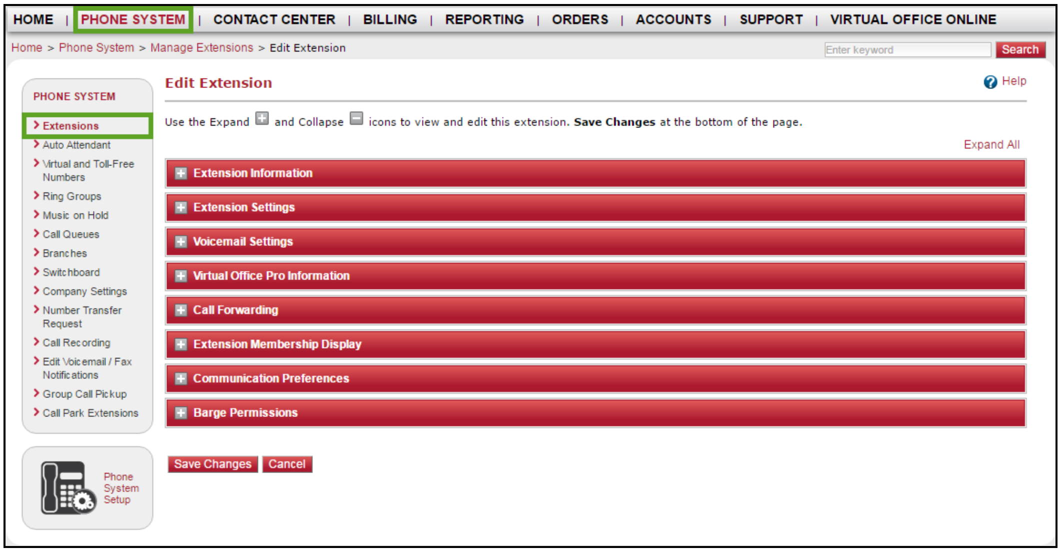
1. Go to **Phone System** in the top navigation bar.
2. Click **View All Extensions**.



3. Click **Edit** next to the extension you want to edit.



4. Use **Expand** or **Collapse** to view and edit the extension.



Note: The panes displayed varies depending on whether the selected extension is Basic, Virtual, Fax, Shared, Unlimited, Unlimited Pro, Metered, etc. If you are editing a Shared extension, see Set up Shared Lines.

Edit Your Extension Information

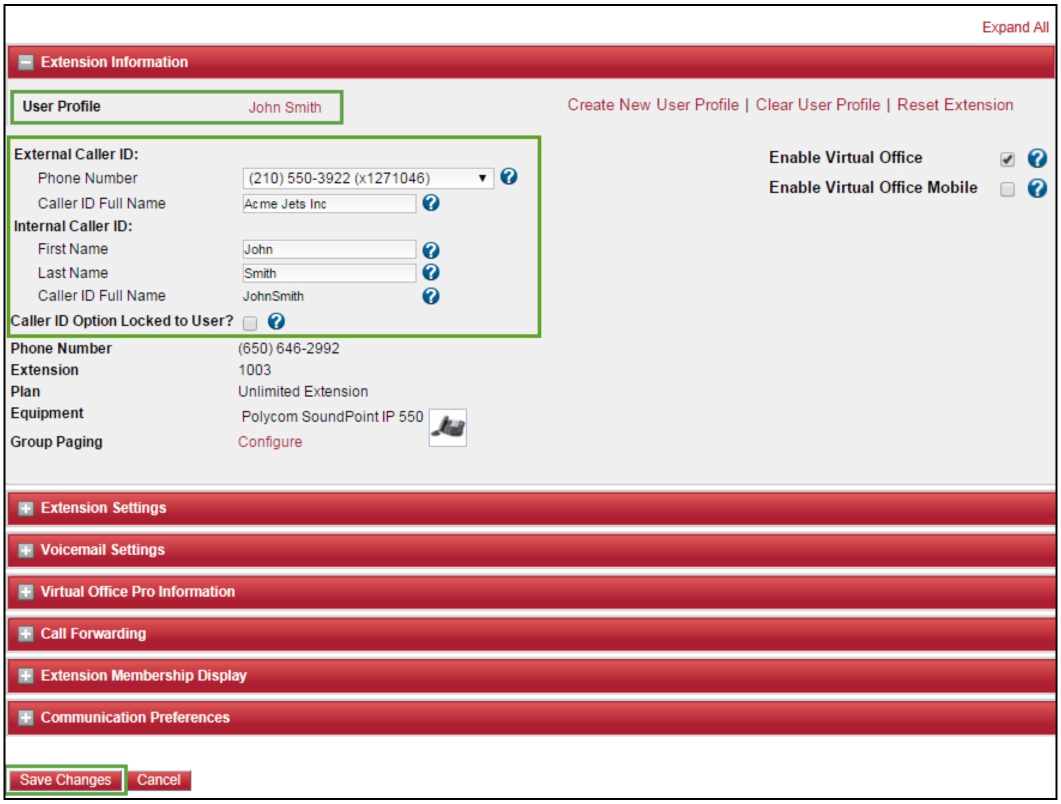
In the Extension Information pane, you can:

- Assign an existing user profile to an extension, or create a new user profile.
- Assign an external or internal caller ID to the extension.
- Enable or disable access to Virtual Office applications.

To edit your extension information and set up a caller ID:

1. Click **Expand** to display the **Extension Information**.
2. Choose a caller ID:
   - **External Caller ID**: To select an optional caller ID displayed for outbound calls made to outside your PBX, such as when you call your customers.

- **Internal Caller ID**: To display the caller's first and last names for internal calls within the PBX, such as when you call your coworkers in the company.



3. Select a **Phone Number** from the list to display for the outbound calls.

Notes:
-If you choose a regular DID number, the company's name can be edited. If you choose a virtual toll-free number, however, it is read-only and the name shows as populated.
-If you leave the external **Caller ID Full Name** blank, it displays the internal caller ID during the outbound call without automatically populating the field.
-If you assign a user profile to an extension, the extensions internal caller ID is automatically populated, but you can edit or change it as you wish.

4. Enter the **External Caller ID Full Name**.
   This name appears during an outbound call.

5. Enter the **Internal Caller ID**.
   This name appears during an internal call.
6. Select the **Caller ID Option Locked to User** check box to prevent a Virtual Office desktop app or Virtual Office mobile app user to change the caller ID settings.

> **Note:** By default, the Virtual Office desktop app is enabled for all unlimited, global, and metered Virtual Office extensions. The Virtual Office desktop app allows extension users to manage and use their phone features, including accessing the corporate directory and call forwarding settings, from any computer. A username and password are required to access these features.

7. Select the **Enable Virtual Office** check box to allow extension user access to the Virtual Office desktop app and Virtual Office online app.
8. Select the **Enable Virtual Office Mobile** check box to allow extension user access to the Virtual Office mobile app. This option is enabled by default.
9. Click **Save Changes** at the bottom of the screen.

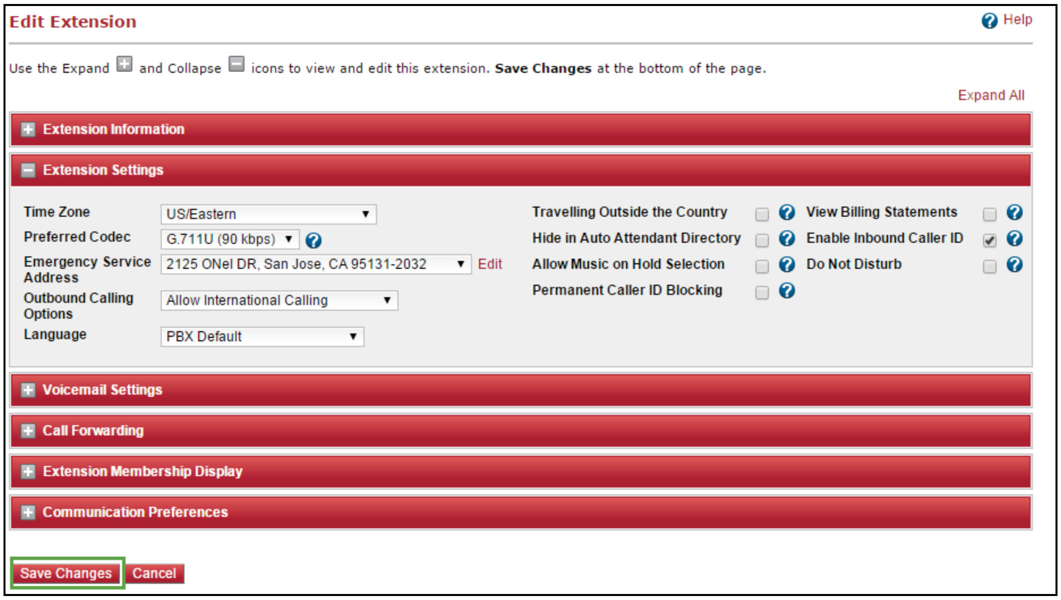
Configure Extension Settings

In this pane, you can:

- Configure time zone.
- Choose a preferred compression/decompression (Codec).
- Edit the emergency service address.
- Allow international, domestic, or emergency calling options.
- And much more!

To configure extension settings:

1. Click **Expand** to display the **Extension Settings** pane.
2. Enter, select, or deselect from the list of options.



3. Select a **Language** from the list.
   This setting determines the language of Telephony IVR messages such as voicemail greetings. The display on the user's desk phone also appears in this language. This setting overrides the default language of PBX or branch.
   Review the following table for the available localization settings.

Summary of Localization Settings

The following table summarizes the localization settings in Account Manager:

Setting	Description	Configured At
Edit My Profile	The primary or secondary administrators who have access to Account Manager can configure the **Language** setting in **Edit My Profile** to communicate emails in their language of choice. This setting overrides the default PBX or branch language setting. It only applies to the administrator's email communications.	User level
Account > User Profiles	Configure the **Language** setting for extension users to communicate emails in their language of choice. This setting in user profile overrides the default PBX or branch language. It	User level

Setting	Description	Configured At
	only applies to the user's email communications.	
Phone System > Company Settings	Configure the **Language** setting for all users in the PBX to receive Telephony IVR messages, such as voicemail greetings in the selected language. This setting is overridden by language settings at the branch and/or individual extension level. In the absence of the individual extension user's language of choice, the language setting of branch overrides the PBX language setting.	PBX level
Phone System > Branches (Add-on subscription-based)	Configure the **Language** setting for users to receive Telephony IVR messages, such as voicemail greetings in the selected language. In the absence of the individual extension user's language of choice, the branch language setting overrides the PBX company language setting. In other words, if an extension belongs to a branch set to Japanese, and if you have not defined another language at the extension level, Telephony IVR messages are played in the Japanese language. If the extension belongs to a branch with no other language defined, you inherit the PBX language.	Branch level
Phone System > Edit Individual Extension	Configure the **Language** setting for extension users to receive Telephony IVR messages, such as voicemail greetings in the selected language. The display on the user's desk phone also appears in this language. This setting overrides the PBX and branch language setting. **Note:** If you need help with setting the user language in bulk, contact 8x8 Support for help. **Note:** To access localized versions of 8x8 Virtual Office applications, refer to your computer or device manual to learn how you can change the display language of your operating system.	Extension level

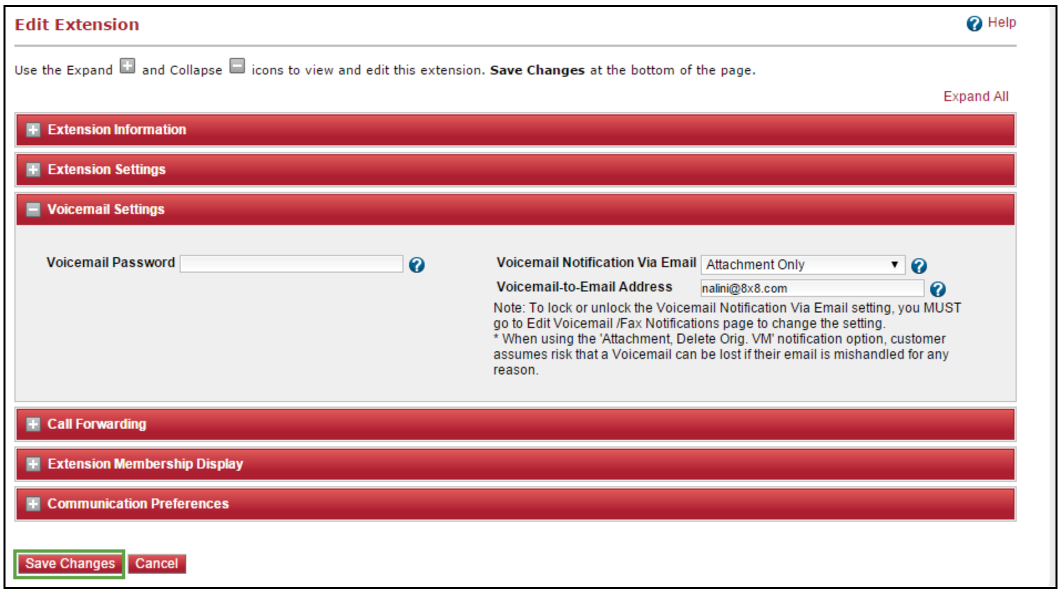
4. Click **Save Changes** at the bottom of the screen.

Define Voicemail Settings

In this pane, you can edit a specific extension's voicemail password, and set up email notification options.

To define voicemail settings:

1. Click **Expand** to display the **Voicemail Settings** pane:



2. Enter a voicemail password.

Note: The minimum required length of the voicemail password is set in the Company Settings. It is 4-15 digits long.

Voicemail Password Security Guidelines

To secure your voicemail password, the following password restrictions are enforced. The password:

- Should be 4-15 digits long.
- Should not use same digits such as 1111, 2222.
- Should not use years from 1900 till present.
- Should not be of ABAB format such as 1010, 2121,3131.
- Should not use sequential numbers such as 1234, 4567.

- Should not use easy to key in numbers from the center of keypad. The following numbers are not allowed - 2580, 0582, 5683 (spells LOVE).

3. Select a voicemail notification via email:
    - **Disable Notification**: An email notification is not sent.
    - **Attachment Only**: An email notification is sent with an audio file of the voicemail attached.
    - **Notification Only**: An email notification is sent without an audio file or link to the voicemail (recommended for companies requiring HIPAA compliance).
    - **Link & Attachment**: An email notification is sent with both a link to the voicemail and an audio attachments, plus links to **Delete Voicemail** and to manage multiple voicemails.
    - **Link Only**: An email is sent with a link to the voicemail and links to **Delete Voicemail** and to manage multiple voicemails.
    - **Attachment, Delete Orig.VM***: An email notification is sent with an audio attachment, but the original voicemail is automatically deleted.

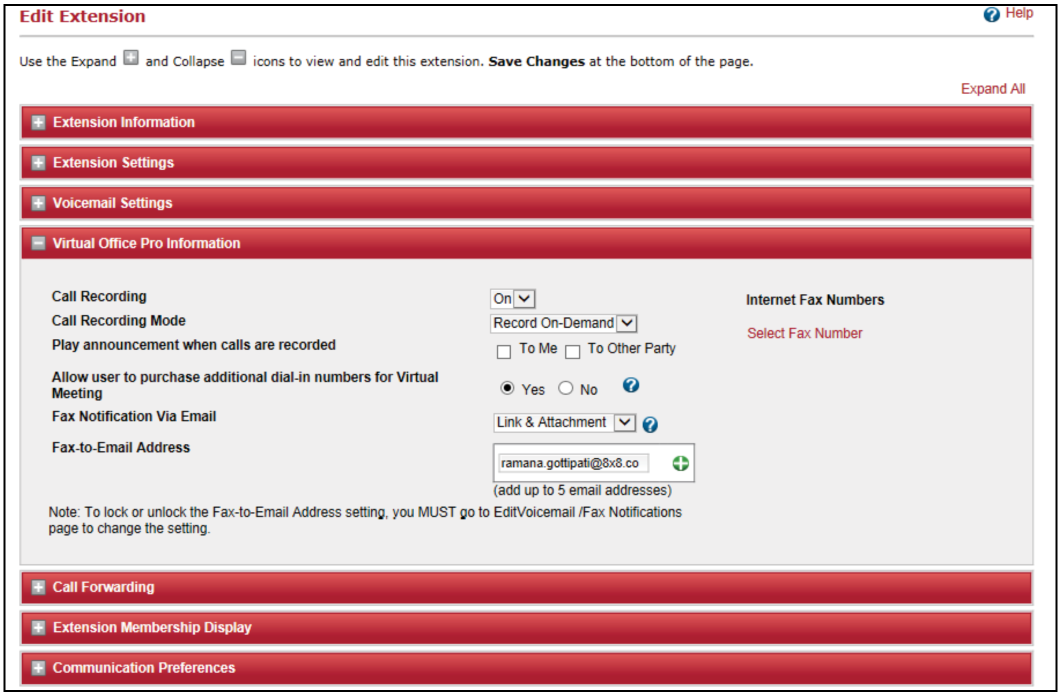
    Note: To configure multiple extensions at once, go to the **Edit Voicemail/Fax Notifications** page.

4. Enter an email address in **Voicemail-to-Email Address** to notify the user of a new voicemail.
5. Click **Save Changes** at the bottom of the screen.

Configure Virtual Office Pro Information

If your 8x8 business account includes extensions utilizing Virtual Office Pro, you are able to edit and configure additional features in this pane.

1. Click **Expand** to display the **Virtual Office Pro Information** pane.



2. Select your preferred options for the individual extension:

   - Call Recording

   Note: Additional options to restrict extensions, such as the user's ability to listen and delete recordings, are available in the **Call Recording** section under the **Phone System** tab.

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

   Note: The additional dial-in numbers can be domestic, international, or toll-free.

   - Fax Notification Via Email

- Fax-to-Email Address

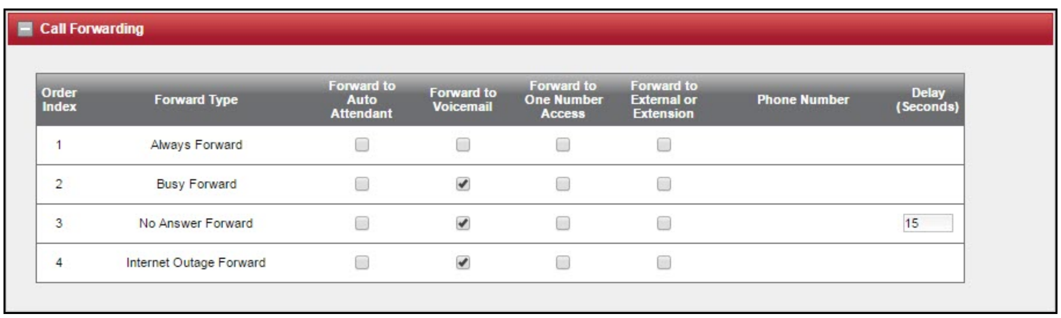
> **Notes:**
> -To lock or unlock the Fax-to-Email Address setting, you must go to the **Edit Voicemail/Fax Notifications** page to change the setting.
> -To configure multiple extensions at once, go to **Edit Voicemail/Fax notifications**.

- Internet Fax Numbers for Virtual Office

3. Click **Save Changes** at the bottom of the screen.

Set up Your Call Forwarding

Call forwarding allows you to set up rules to direct how calls are forwarded to different destinations, either sequentially or simultaneously.



Call Forwarding

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	☐	☐	☐	☐		
2	Busy Forward	☐	☑	☐	☐		
3	No Answer Forward	☐	☑	☐	☐		15
4	Internet Outage Forward	☐	☑	☐	☐		

You can manage call forwarding using:

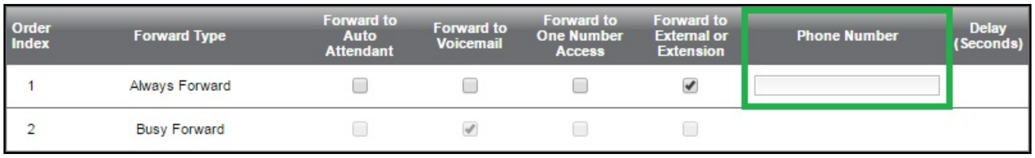
- Manage Call Forwarding: Basic Setup
- Manage Call Forwarding: User Setup

Manage Call Forwarding: Basic Setup

Call Forwarding offers control over:

- **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, etc.
- **Forward to Voicemail**: Callers are forwarded to a destination voicemail box, 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 up to four destinations 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 feature, a field appears in the **Phone Number** column where you can enter the number you would like the calls forwarded to.



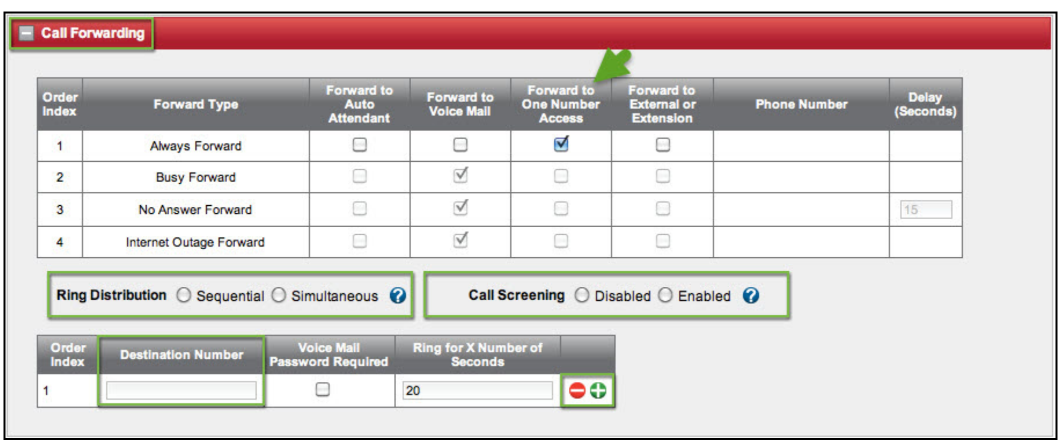
Order Index	Forward Type	Forward to Auto Attendant	Forward to Voicemail	Forward to One Number Access	Forward to External or Extension	Phone Number	Delay (Seconds)
1	Always Forward	☐	☐	☐	☑		
2	Busy Forward	☐	☑	☐	☐		

To Manage Call Forwarding:

1. Click **Expand** to display the **Call Forwarding** pane.
2. Select the desired options for these call forwarding types:

Forward Type	Note
Always Forward	If you select the **Always Forward** check box, all other forwarding options will be disabled. To re-enable them, clear the **Always Forward** check box.
Busy Forward	
No Answer Forward	You can also select a delay time, in seconds, for this feature. The default time is 15 seconds.
Internet Outage Forward	

3. If you select **Forward to One Number Access**:

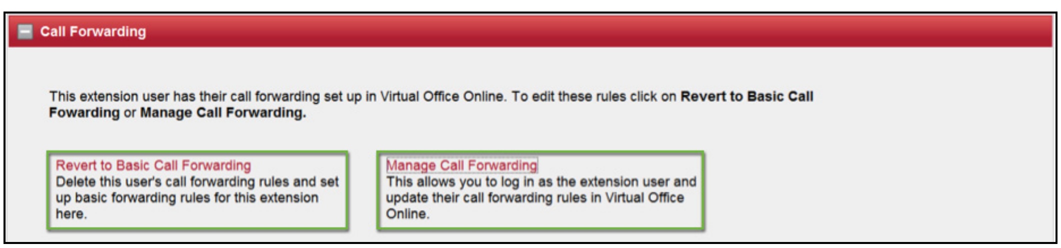


Option	Note
Select whether ring distribution is **Sequential** or **Simultaneous**.	
Select whether call screening is **Disabled** or **Enabled**.	Enabling this feature requires callers to record their name so you can screen their calls before answering.
Enter the first destination number your calls will be forwarded to.	The number could be a phone number, extension number, Ring Group number, call queue number, etc.
Select the **Voicemail Password Required** check box if you want to ensure that only you can answer forwarded calls at a target destination.	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 time is 20 seconds.

4. Click **Add** to enter more phone numbers.
5. Click **Save Changes** at the bottom of the screen.

Manage Call Forwarding: User Setup

Users can set up their own call forwarding rules by logging in to the Virtual Office desktop app. When you edit an extension that already has call forwarding rules, you have the option to click **Revert to Basic Call Forwarding** or **Manage Call Forwarding**.

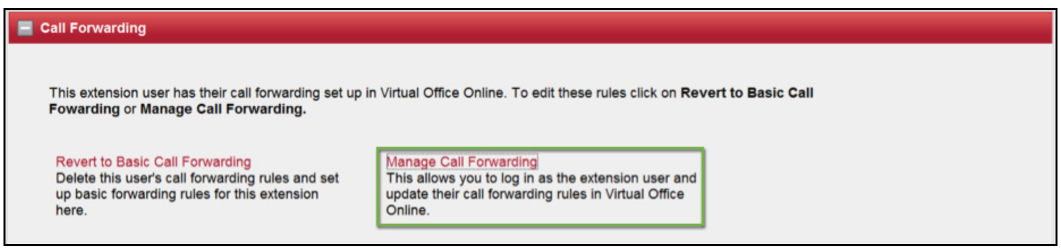


- **Revert to Basic Call Forwarding**
  Deletes the user's rules, and allows you to set up basic call forwarding by following the steps in the **Manage Call**

Forwarding section.

Manage Call Forwarding

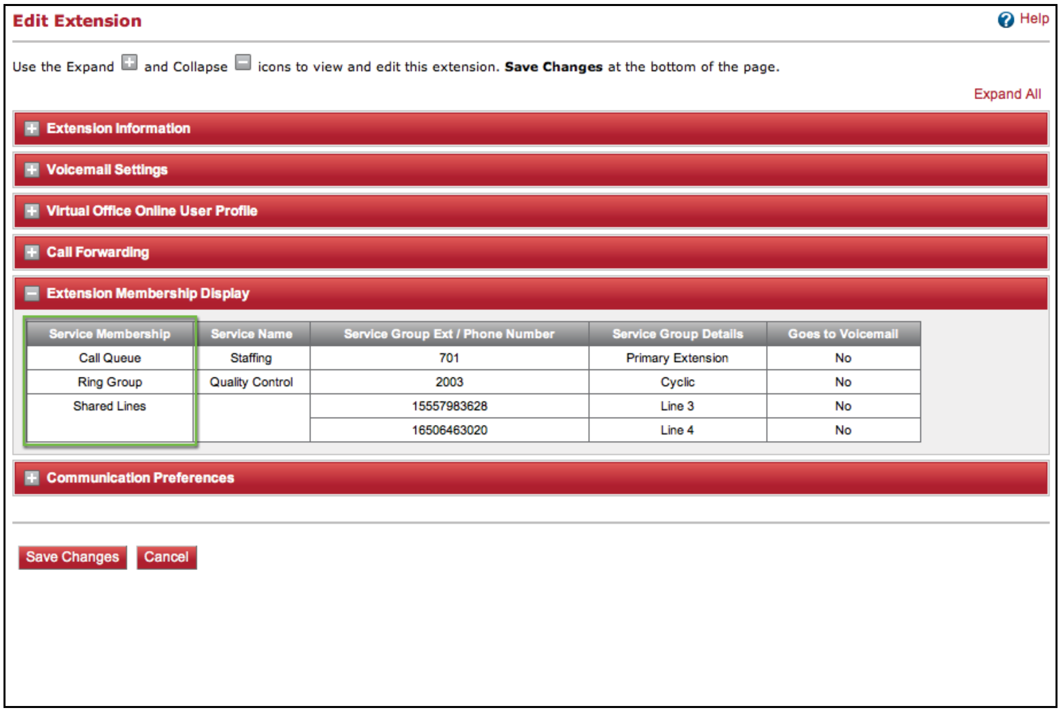
Allows you to log in as the user, and manage rules using the advanced options in the Virtual Office desktop app. For more details on this feature, refer to the Virtual Office desktop app user guide.



View Extension Membership

Refer to this display-only pane to view details about:

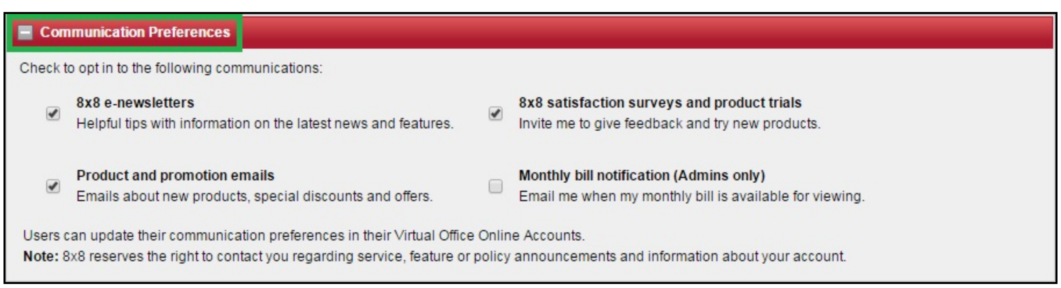
- The extension's services such as **Call Queue**, **Ring Group**, and **Shared Lines**.
- Service group extension or phone number.



Choose Communication Preferences

This pane controls all 8x8 communication preferences for each individual extension user. User can opt in or out of receiving updates, surveys, and promotional material from 8x8.

1. Click **Expand** to open the **Communication Preferences** pane.



2. Select or deselect options to determine whether the extension user receives the following communications from 8x8 services:

- 8x8 newsletters
- Product and promotion emails
- 8x8 satisfaction surveys and product trials
- Monthly bill notifications (administrator-only option)

3. Click **Save Changes** at the bottom of the screen.

Note: Refer to Configure Company Settings to view and modify the company's preferences at the PBX level.
Agents can select their own communication preferences via the Virtual Office desktop app.

Edit Multiple Extensions

By editing multiple extensions, you can:

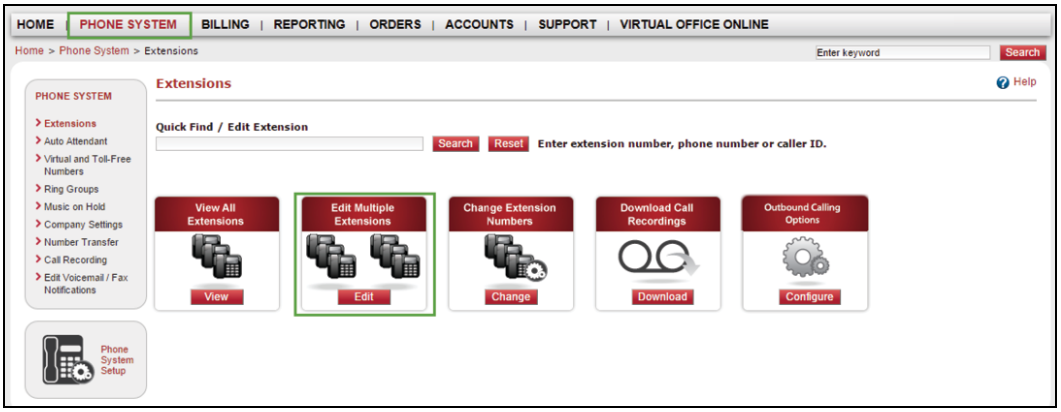
- Change the caller ID first and last name.
- Hide the extension in the Auto Attendant when callers access the Company Directory or Dial-by-Name options.
- Allow the extension users to select their own Music on Hold from the company library via the Virtual Office desktop app.
- Allow the extension users to view their billing statements in the Virtual Office desktop app.
- Allow the extension users to access the Virtual Office desktop app.
- Allow the extension users to access the Virtual Office mobile app.
- Select a phone number to be displayed for outgoing calls.

Note: Phone numbers appear in the E.164 numbering format.

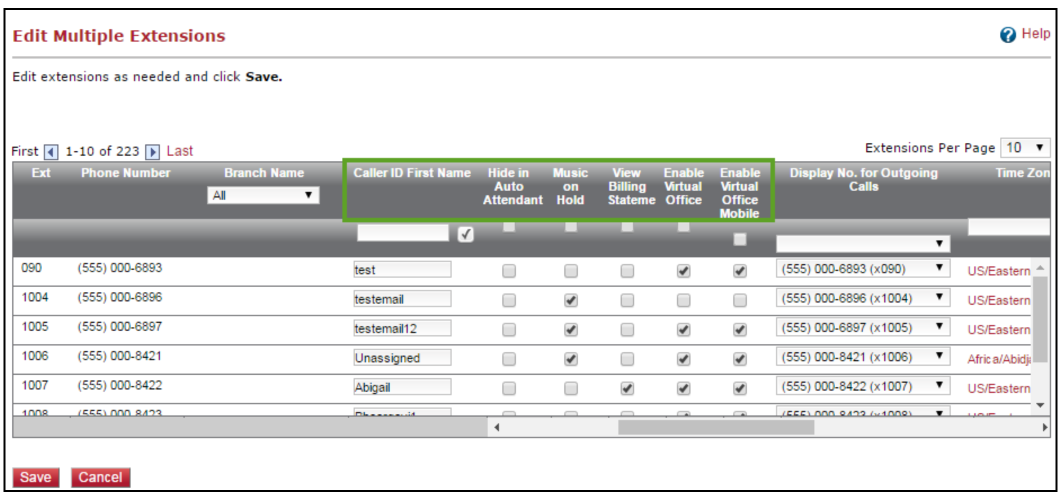
- Select time zones for phone display and voicemail time stamp.
- Enter an emergency service address for emergency services. The address for each user must be accurate and verified. This is needed whenever someone makes an emergency call from that extension.
- Select a preferred Codec for upload and download bandwidth, voice quality, and compatibility with 8x8 devices.

To edit multiple extensions:

1. Click **Phone System** in the top navigation bar.
2. Click **Edit Multiple Extensions**.



3. Using the gray navigation bar, configure options such as caller ID name, visibility in Auto Attendant, social networks, hold music, billing statements, outgoing call number, and time zone.
4. Select or clear a check box in the top row to apply the change to the entire column.



5. Select the **Enable Virtual Office** check box to allow extension user access to the Virtual Office desktop app and Virtual Office online app.
6. Select the **Enable Virtual Office Mobile** check box to allow extension user access to the Virtual Office mobile app.

7. Click **Save** to apply your changes.

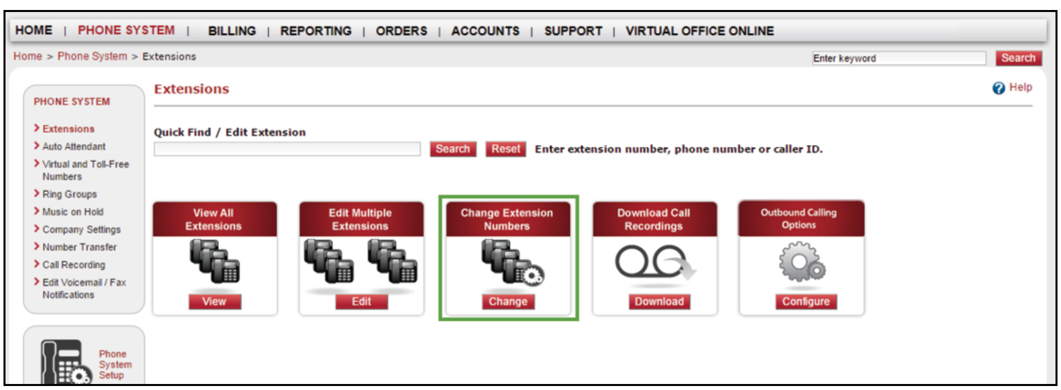
> **Note:** Additional extension features can be configured by the phone administrator or by the individual extension user.

Change Extension Numbers

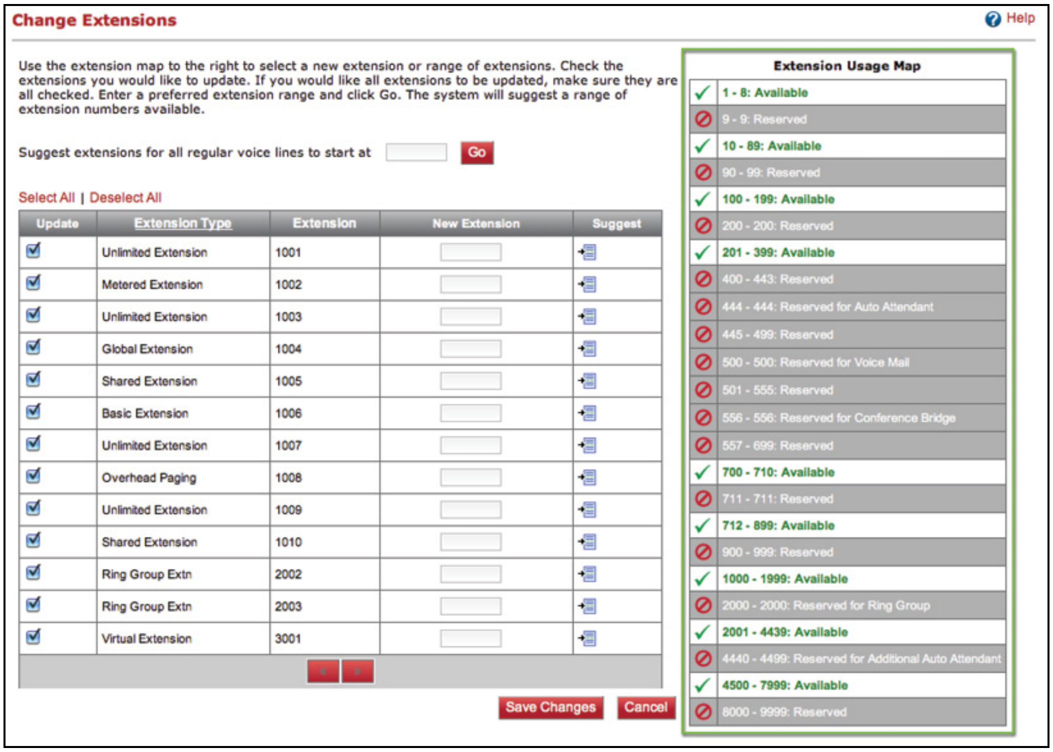
The default extensions in 8x8 Virtual Office start at 1001. The Change Extension Numbers feature allows you to change a selected individual extension number, or customize multiple extensions at once. You can change the extensions to eight-digit numbers, for example, or start at 2001. You can enter a new extension number, or simply use auto-suggest  for the system to suggest one. The Extension Usage Map on the right side of the screen provides a list of available and reserved extensions for your reference.

To change extension numbers:

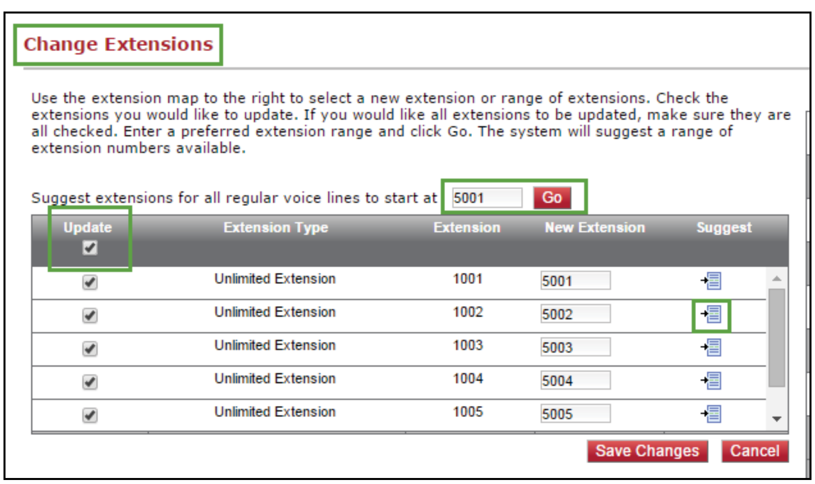
1. Click **Phone System** in the top navigation bar.
2. Click **Change Extension Number**.



3. Refer to the **Extension Usage Map** to see available extension numbers.



4. To change multiple extensions:
   - Deselect all extensions by selecting the **Update** check box.
   - Enter a starting number in the field provided, and click **Go**. We suggest regular voice lines start at 5001.



Note: Only regular lines are changed. Shared Lines, Call Queues, and Ring Groups must be changed individually.

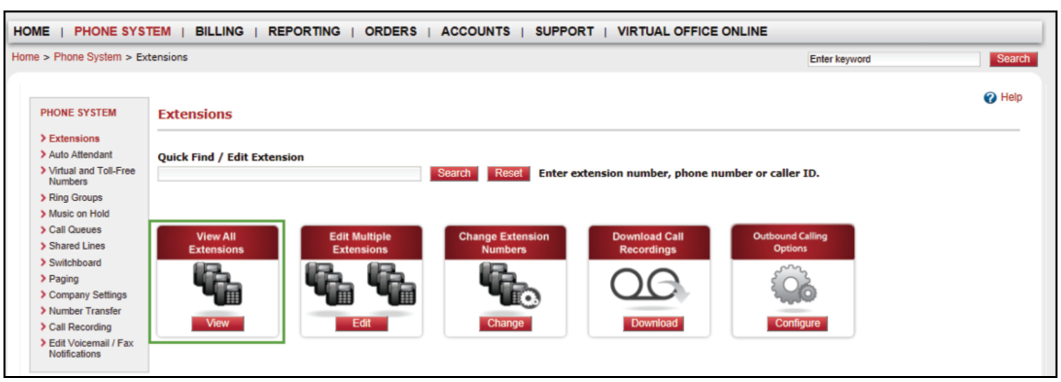
5. To change individual extensions:
   - Select the check box next to the extension(s) you want to change.
   - Enter an available number in the **New Extension** column, or click the **Suggest** icon to see the next available extension number in the same range.
6. Click **Save Changes** at the bottom of the screen.

Reset Extensions

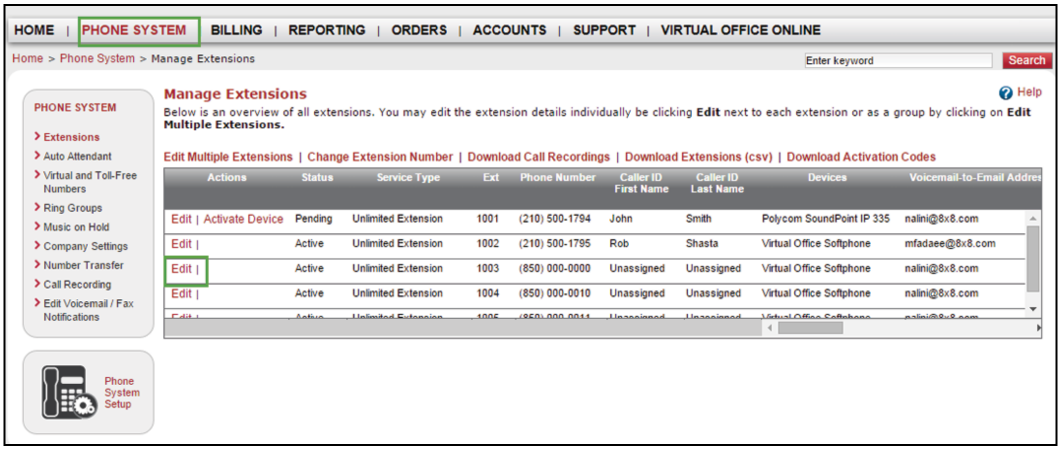
You can select an individual extension to reset to its default settings. This does not delete or clear the user profile and extension, but only resets settings such as ONA rules, forwarding rules, voicemail greetings, messages, password, and so on.

To reset an extension:

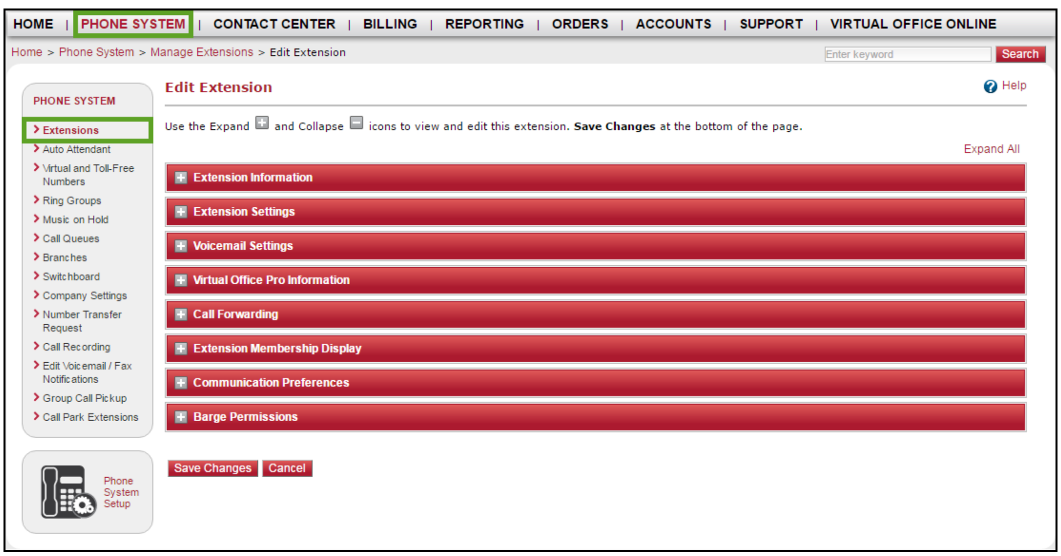
1. Go to **Phone System** in the top navigation bar.
2. Click **View All Extensions**.



3. Click **Edit** next to the extension you want to edit.



4. If necessary, click **Expand** to view and edit the **Extension Information** pane.



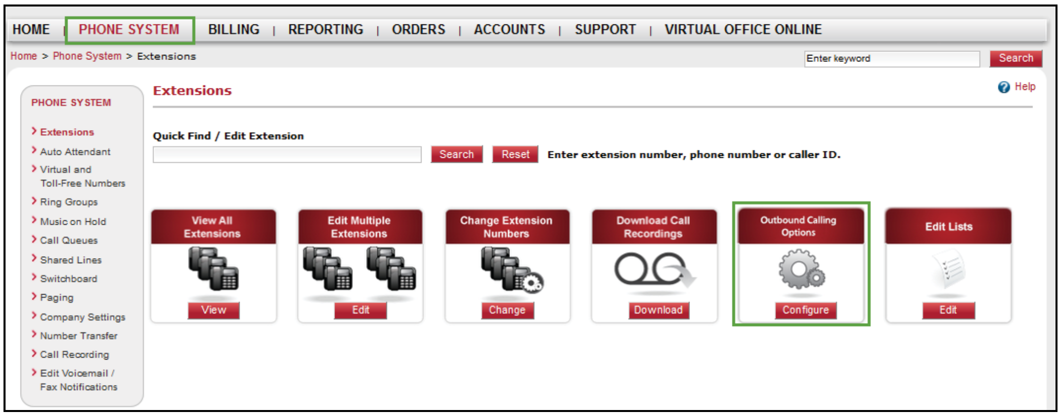
5. In the **Extension Information** pane, click **Reset Extension**.
6. Accept the confirmation prompt to reset the extension.

Define Outbound Calling Options

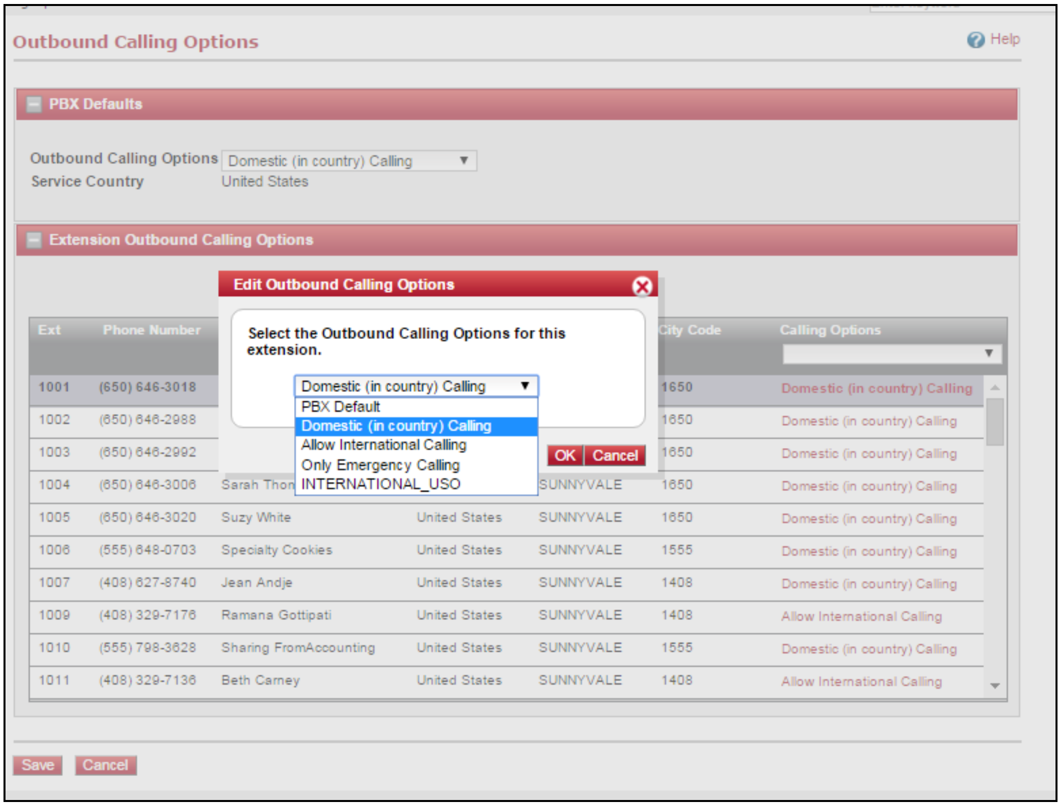
For your PBX outbound calls and IVR language, you can set your default calling option as domestic, international, or emergency calls. You can apply the calling option to all your extensions at once, or configure each extension individually.

To define outbound calling options:

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Outbound Calling Options**.



3. You can define the outbound calling options at the PBX level using the **PBX defaults** drop-down menu.
   OR
   Click the link under **Calling Options** to define outbound calling options for any individual extension.

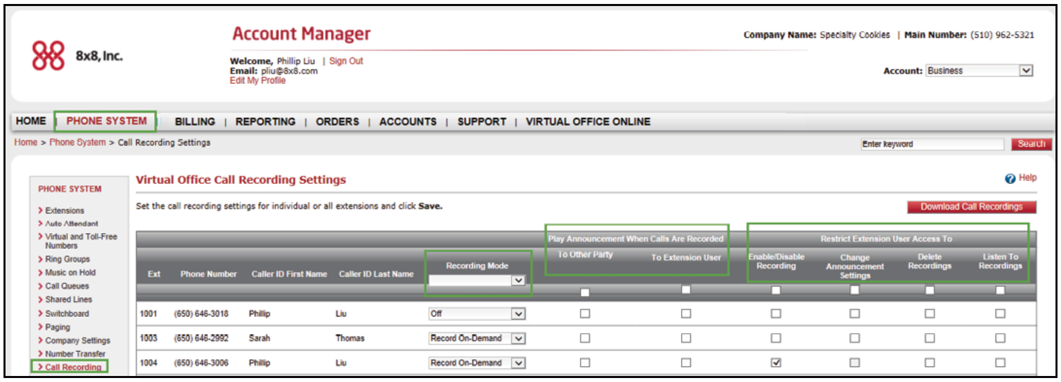


The available options for outbound calling include domestic, international, and emergency calling. Based on your service, US English or UK English languages may become available to you.

Manage Call Recording

8x8 Virtual Office Pro users can record, delete, and listen to calls from their extensions. Phone system administrators can configure call recording settings by individual extension, or in bulk at the PBX level. Branch administrators can access, delete, and listen to recordings made by users within their branch.

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Call Recording**.



Note: Review Terms and Conditions for call recording, as recording laws vary by region.

3. Configure the following options for all extensions.
   - **Recording Mode**: Recording mode sets the frequency of recorded calls to **Off**, **Always Record**, or **Record On-Demand**.
   - **Play Announcement When Calls Are Recorded**: Plays announcement either **To Other Party** or **To Extension User**.
   - **Restrict Extension User Access To**: Determines whether users can **Enable/Disable Recording**, **Change Announcement Settings**, **Delete Recordings**, or **Listen to Recordings**.
4. Click **Save** to apply your changes.

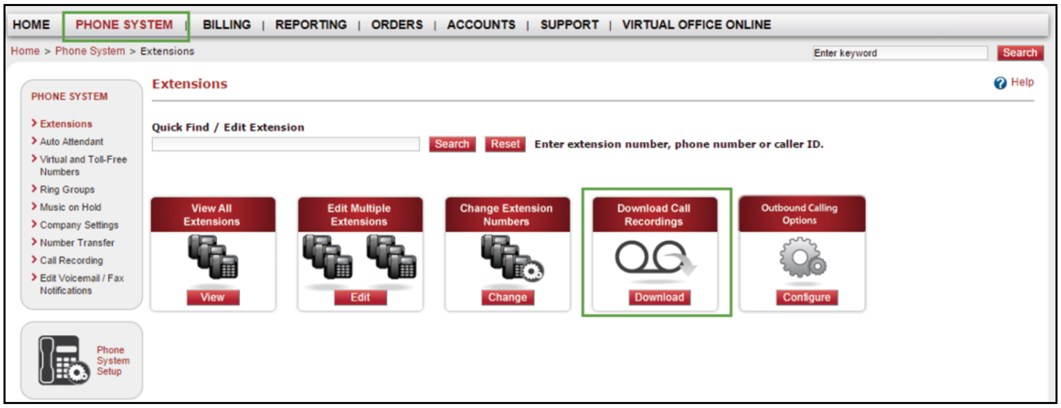
Note: Select a check box in the header row to select and apply a change to all extensions.

Download Call Recording

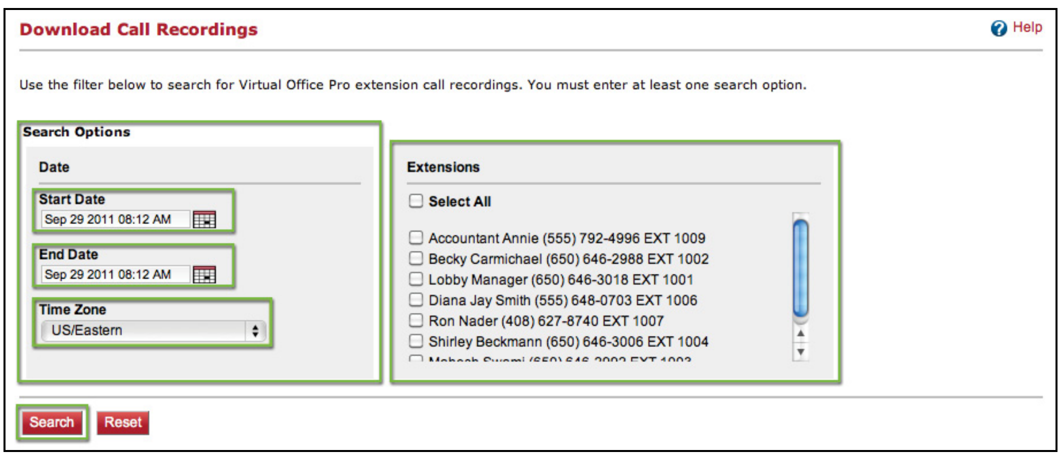
If your 8x8 corporate account includes Virtual Office Pro, users can record calls from their extensions. Users and their branch administrators can access and download call recordings. Extensions users can access their call recordings via Virtual Office desktop app, while administrators can access recordings of extension users from Account Manager.

To download call recordings:

1. Click **Phone System** in the top navigation bar.
2. Click **Download Call Recording**.



3. Select your filtering options. Enter the desired date range, time zone, and select the desired extensions. If you are a branch administrator, you will see the extensions assigned to the branch only.

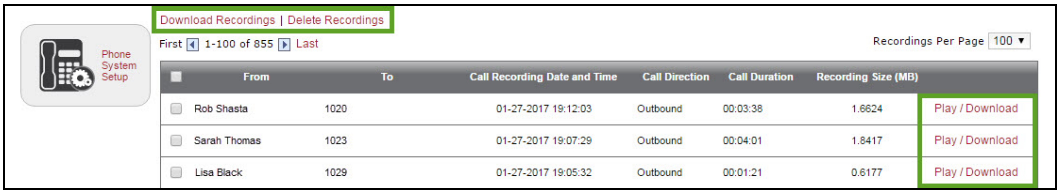


Note: You must select at least one extension.

4. Click **Search**.

   The search results are displayed.
5. Select the check box next to the recording(s) you want to access.

6. When you access the recordings:
   - To listen to a single recording at your desktop, click **Play** next to the desired recording.
   - To download a single recording to your computer, click **Download** next to the desired recording.
   - To download the selected recording(s) to your computer, click **Download Recordings**.
   - To delete the selected recording(s), click **Delete Recordings**.

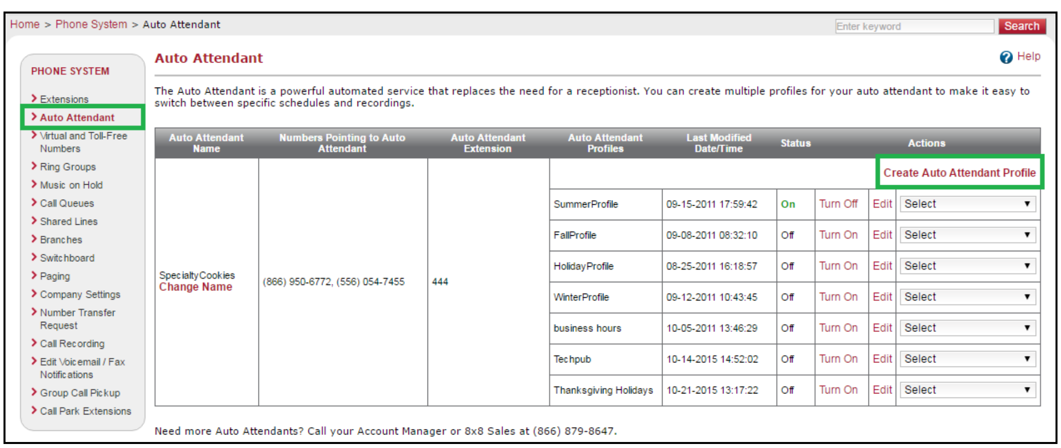


Create an Auto Attendant Profile

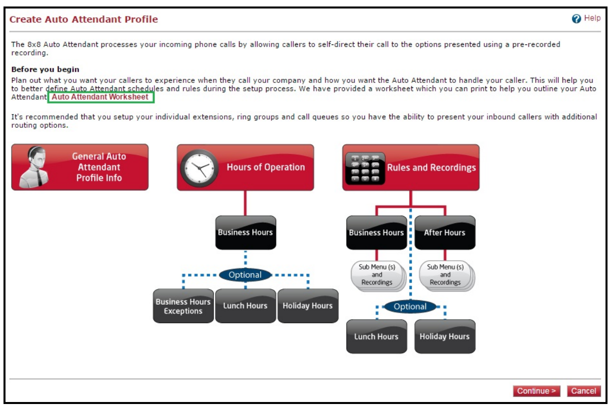
Auto Attendant is a service that acts as an automated receptionist. Through profiles and rules, you can select which phone menu options and recordings are used at specific times for callers to route themselves to an appropriate destination. Auto Attendant profiles are created to define menu options and recordings for specific situations. Every profile has rules associated with it. The rules define call flow and menu recordings within certain parameters.

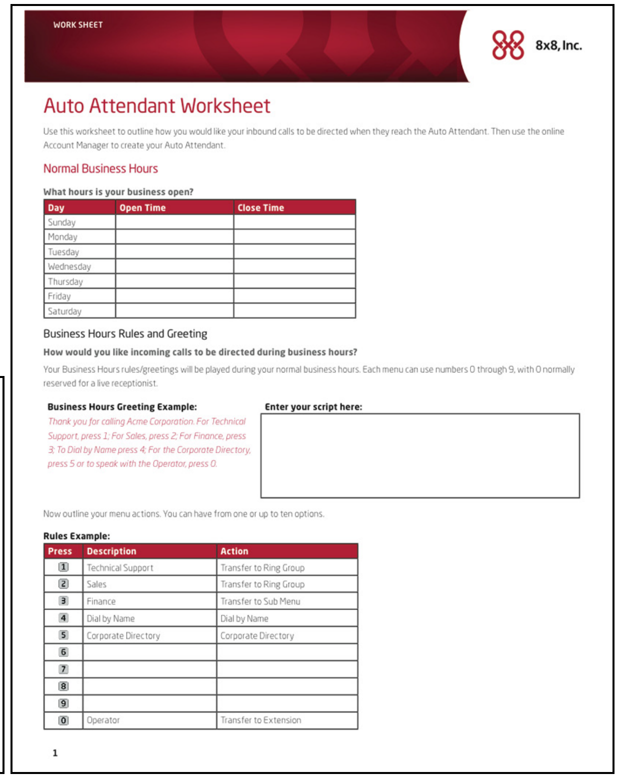
Step 1: Create a New Auto Attendant Profile

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Auto Attendant**.
3. Click **Create Auto Attendant Profile**.



4. Review the Auto Attendant Profile Overview and complete the **Auto Attendant Worksheet** to outline how you would like inbound calls directed when they reach the Auto Attendant. This step is optional. You can use this worksheet to create your Auto Attendant rules.




WORK SHEET

8x8, Inc.

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:

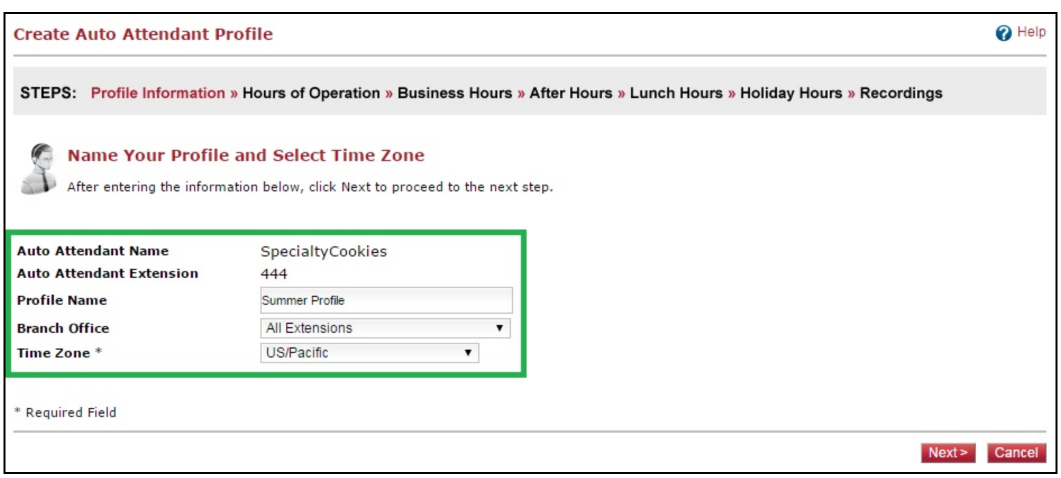
Now outline your menu actions. You can have from one or up to ten options.

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

1

5. Once you are ready to configure your Auto Attendant, click **Continue** at the bottom of the page.
6. Name your Auto Attendant profile, and select the appropriate time zone.



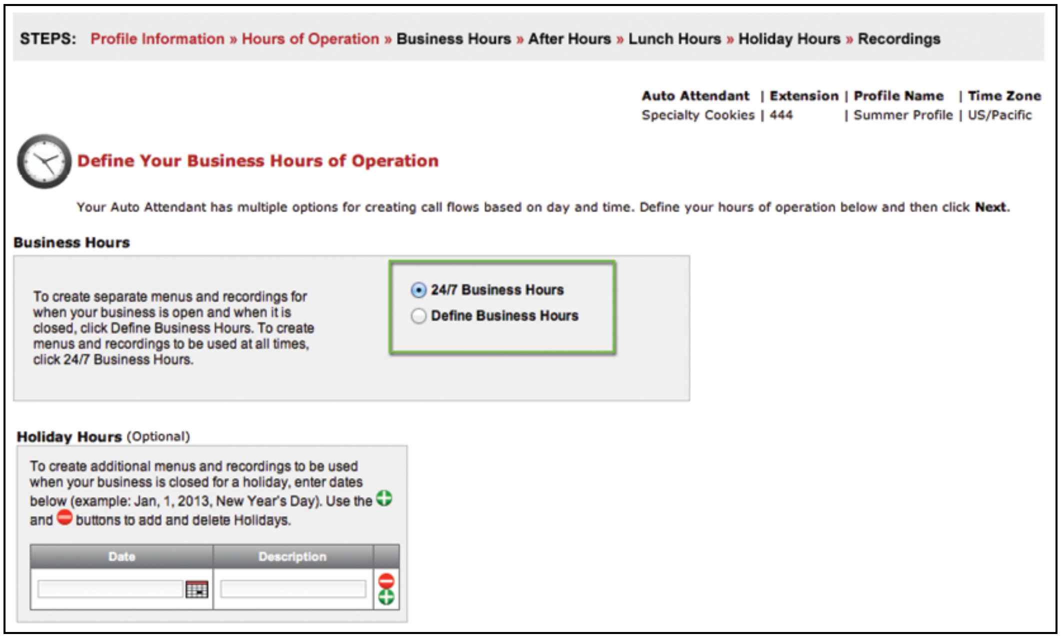
7. Click **Next**.

Step 2: Define Hours of Operation

You can define business hours and holiday hours.

To select business hour type:

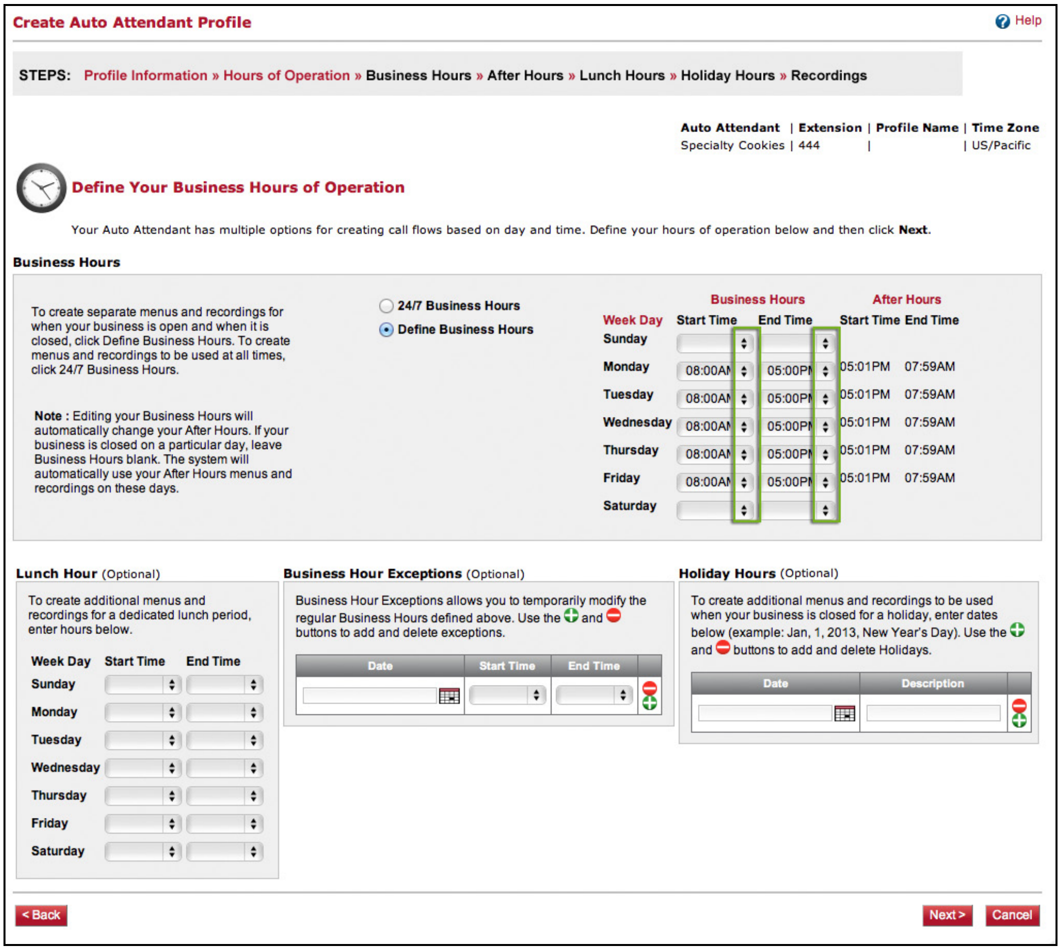
- Select **24/7 Business Hours** to define menus and recordings to be used at all times.
- Select **Define Business Hours** to create unique menu options and recordings for different times of the day such as normal business hours, non-business hours, etc.



You can create additional menus and recordings for closed business hours such as holidays. This is optional, and particularly useful if you decide to go with **24/7 Business Hours**.

To define business hours:

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



Note: After Hours are displayed automatically based on the time you define as business hours.

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

Note: Lunch Hour and **Business Hour Exceptions** are only available with the **Define Business Hours** option.

3. Click **Next** to continue.

Step 3: Define Rules for Business Hours

Define the action the Auto Attendant should take when the option is selected by the user.

1. Enter your phone menu rules for **Business Hours**:
    a. Select a **Key**.
    b. Enter a **Description** of the function that key will enable.
    c. Select a **Call Routing** function for the key you selected.

    d. Click and to add and delete key settings.
    e. Draft a script for your menu recording. You will have the opportunity to create or upload a menu recording after the profile is created.
2. When you have finished configuring your business hour rules, click **Next** or **Create Profile**.
3. If applicable, repeat steps 1-2 above to configure menus for after hours, lunch hour and holiday hours.
4. When you are finished, click **Create Profile**.
   Once you have created an Auto Attendant profile, you can create or upload recordings for each menu.

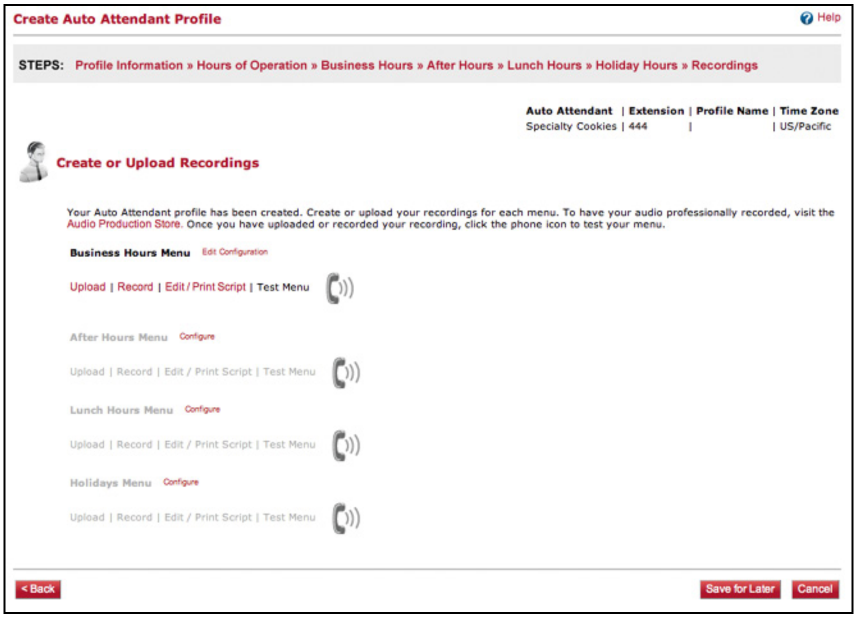
Step 4: Upload Recordings

You can choose to upload an existing recording or create a new one:

To upload a recording

To upload a recording, see Step 1: Create a New Auto Attendant Profile.

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

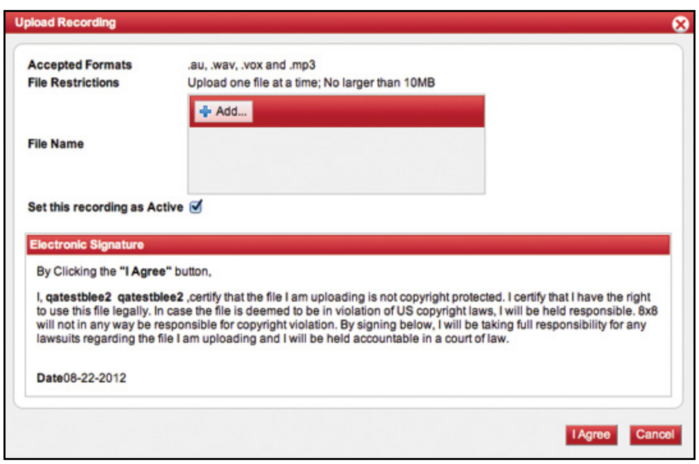


a. Click **Upload** under the appropriate menu.

b. Click the **Add** button.

c. Select the audio file you want to upload.

d. Click **Upload**.



e. Review the electronic signature text, and click **I Agree**.

f. 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 .

To create your own menu recording

1. To record a menu:
   a. (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.
   b. Click **Record**.
   c. Enter your 10-digit phone number and click **Start Recording**.

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

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

Step 5: Activate Your New Auto Attendant Profile

1. Return to the main **Auto Attendant** page.
2. Locate the profile you created in the list.
3. Click **Turn On** to activate your profile.
   You have successfully configured your Auto Attendant.

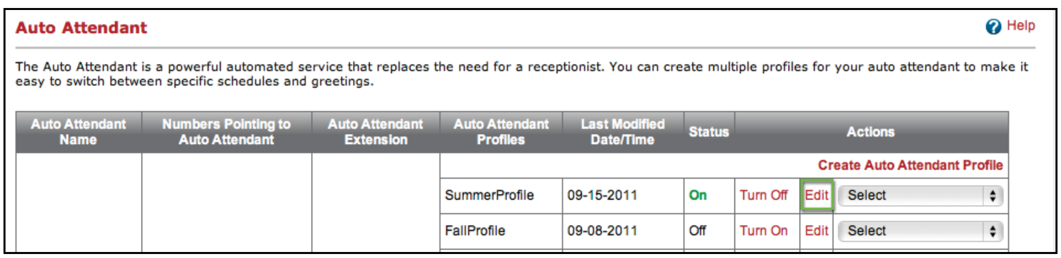
4. Click **Phone System Setup** to return to the **Phone System Setup** page.

Editing an Auto Attendant Profile

You can make changes to an existing Auto Attendant, test the menu options, print recording scripts, or delete the Auto Attendant.

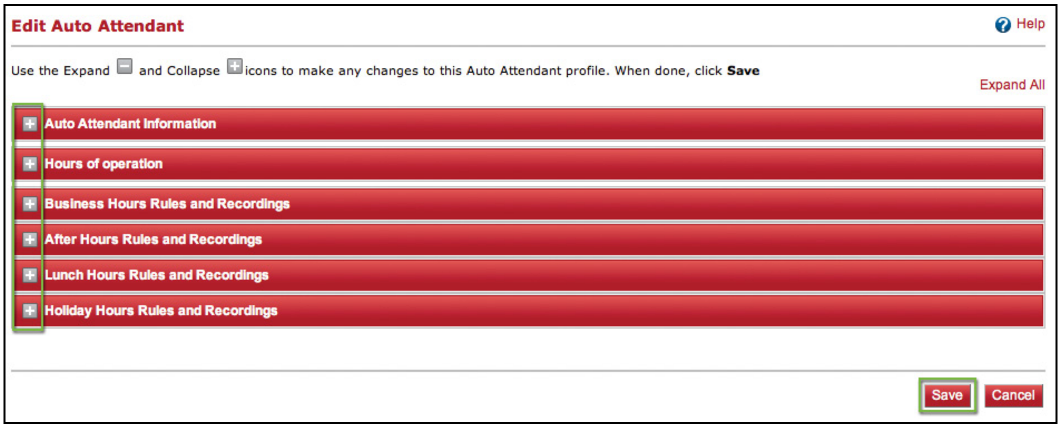
To edit an Auto Attendant profile:

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Auto Attendant**.
3. Locate the profile you want to modify in the list, and click **Edit**.



Note: If you try to edit an active profile, the system asks you whether you want to make a copy of the profile before proceeding. This is to ensure you do not lose the desired information or functions. You can proceed with or without copying.

4. Click **Expand** and **Collapse** to view and edit the panes.

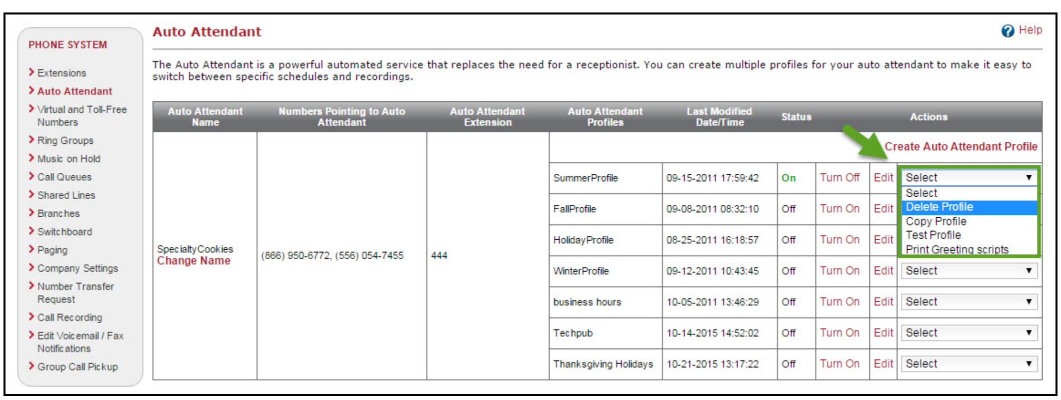


Note: If you selected **24/7 Business Hours** when configuring Auto Attendant, you cannot edit or configure rules for **After Hours**, **Lunch Hour**, or **Holiday Hours**. 24/7 applies to all hours, every day.

5. After entering your changes in any of the panes, click **Save**.

To delete, copy or test Auto Attendant profile:

Delete, copy, test a profile, or print recording scripts, by clicking the drop-down arrows on the main Auto Attendant page.

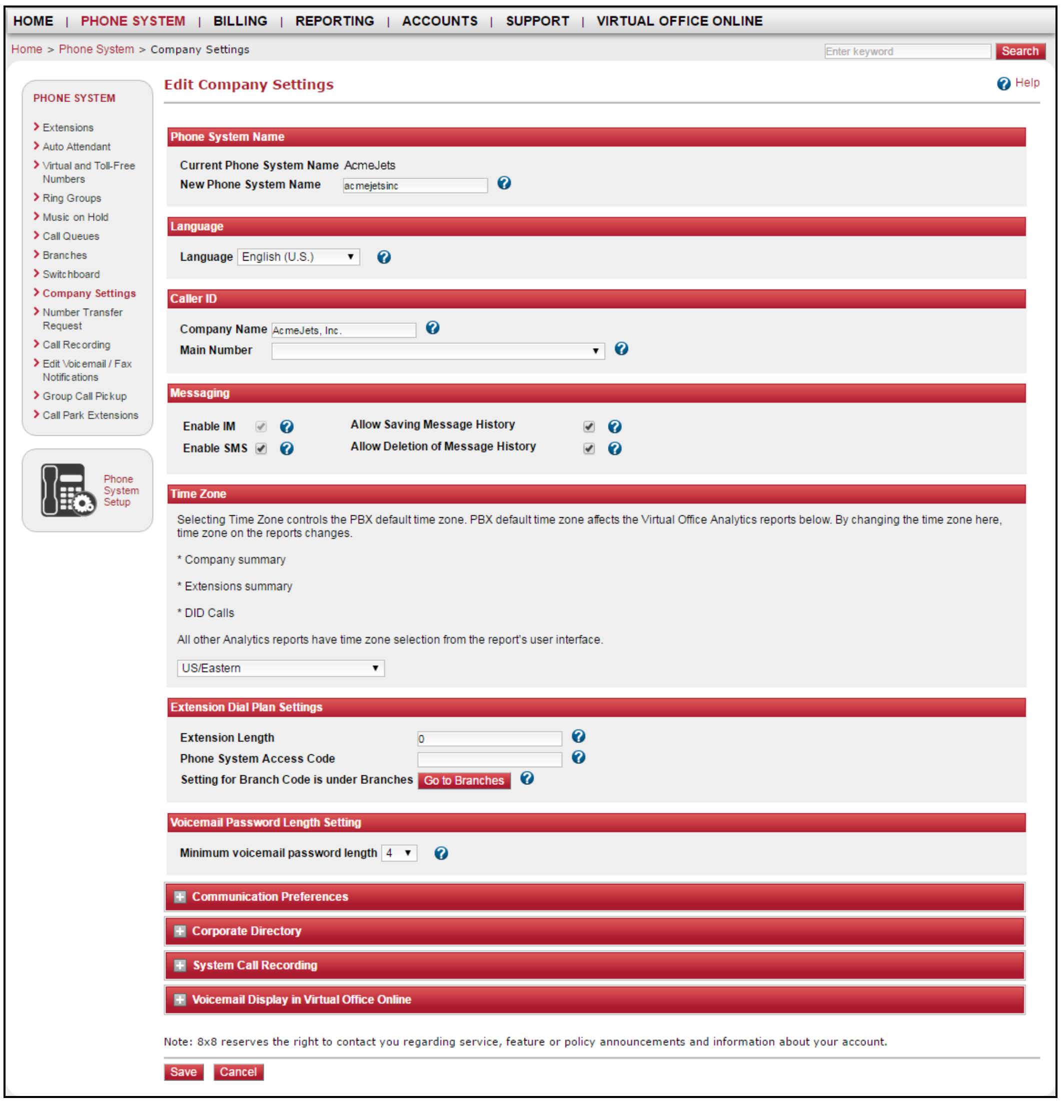


Configure Company Settings

You can configure settings for phone system, company name, caller ID, SMS and IM, time zone, voicemail, and more for your company under **Company Settings**.

Phone System Name, Language, and Caller ID

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Company Settings**.



3. Your company's phone system name, caller ID information, messaging settings, and time zone are displayed. Enter a **New Phone System Name** if you wish to rename your current phone system.
4. Enter a new **Company Name** for your caller ID, if applicable.

> **Note:** This name appears on your outbound caller ID and on all invoices and communications from 8x8.

5. Select a **Language** from the list.
This setting determines the language of the Telephony IVR messages such as voicemail greetings. You can also set the language for each user at the extension level. The extension level setting overrides the PBX-level setting.

> **Note:** The PBX language does not affect the agent's desk phone display. You need to select the preferred language for the individual extension. For details, refer to Edit Individual Extensions.

Review the following table for the available localization settings.

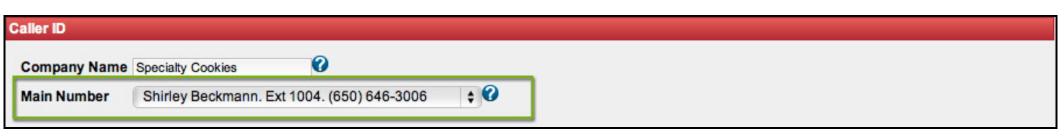
Summary of Localization Settings

The following table summarizes the localization settings in Account Manager:

Setting	Description	Configured At
Edit My Profile	The primary or secondary administrators who have access to Account Manager can configure the **Language** setting in **Edit My Profile** to communicate emails in their language of choice. This setting overrides the default PBX or branch language setting. It only applies to the administrator's email communications.	User level
Account > User Profiles	Configure the **Language** setting for extension users to communicate emails in their language of choice. This setting in user profile overrides the default PBX or branch language. It only applies to the user's email communications.	User level
Phone System > Company	Configure the **Language** setting for all users in the PBX to receive Telephony IVR messages, such as voicemail greetings in the selected language. This setting is overridden by language settings at the branch and/or individual	PBX level

Setting	Description	Configured At
Settings	extension level. In the absence of the individual extension user's language of choice, the language setting of branch overrides the PBX language setting.	
Phone System > Branches (Add-on subscription-based)	Configure the **Language** setting for users to receive Telephony IVR messages, such as voicemail greetings in the selected language. In the absence of the individual extension user's language of choice, the branch language setting overrides the PBX company language setting. In other words, if an extension belongs to a branch set to Japanese, and if you have not defined another language at the extension level, Telephony IVR messages are played in the Japanese language. If the extension belongs to a branch with no other language defined, you inherit the PBX language.	Branch level
Phone System > Edit Individual Extension	Configure the **Language** setting for extension users to receive Telephony IVR messages, such as voicemail greetings in the selected language. The display on the user's desk phone also appears in this language. This setting overrides the PBX and branch language setting. **Note:** If you need help with setting the user language in bulk, contact 8x8 Support for help. **Note:** To access localized versions of 8x8 Virtual Office applications, refer to your computer or device manual to learn how you can change the display language of your operating system.	Extension level

6. Click the **Main Number** drop-down arrow to select a new main number for your company, if desired.

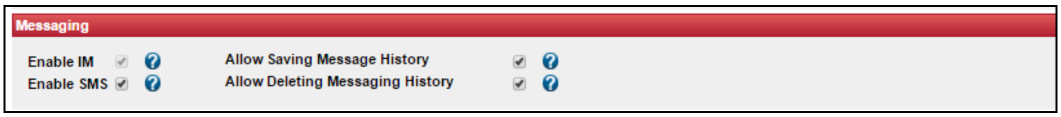


7. Click **Save**.

Note: This overrides the settings selected by extension users in the Virtual Office desktop app.

IM and SMS Messaging

When you enable **IM** and **SMS** messaging at the PBX level, 8x8 Virtual Office provides messaging access to your company contacts. Once IM or SMS are enabled, agents can save and delete message history. Agents can then send instant messages to one or multiple contacts, whether in the same conversation or separate conversations. They can also view message history and export the conversations as text files.



Time Zone

Select a Time Zone to control the PBX default time zone. PBX default time zone affects the Virtual Office Analytics reports:

- Company summary
- Extensions summary
- DID Calls

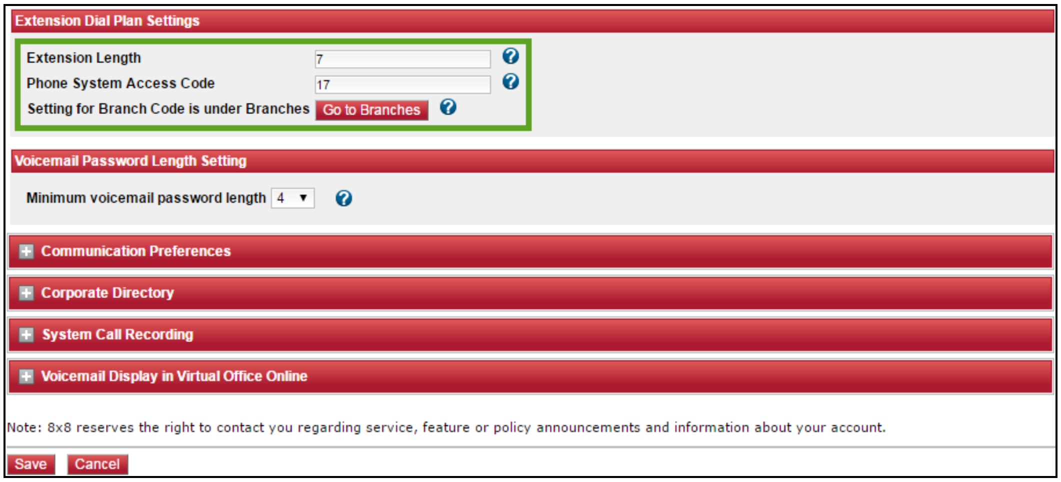
By changing the time zone here, time zone on the reports changes. Other Analytics reports have time zone selection from the report's user interface.

Extension Dial Plan Settings

Note: Extension dial plan settings are only applicable to enterprise customers with multiple PBXs and branches.

In **Extension Dial Plan Settings**, enter the following:

- **Extension Length**: The combined length of the branch code and short code. For example, if the short code is four digits long and the branch code is two digits long, then you must allow six-digit extension length.
- **Phone System Access code**: Identifies the PBX and is used for inter-PBX dialing. An access code must have the same number of digits across all PBXs.



Note: All PBXs within the company must be assigned a phone system access code.

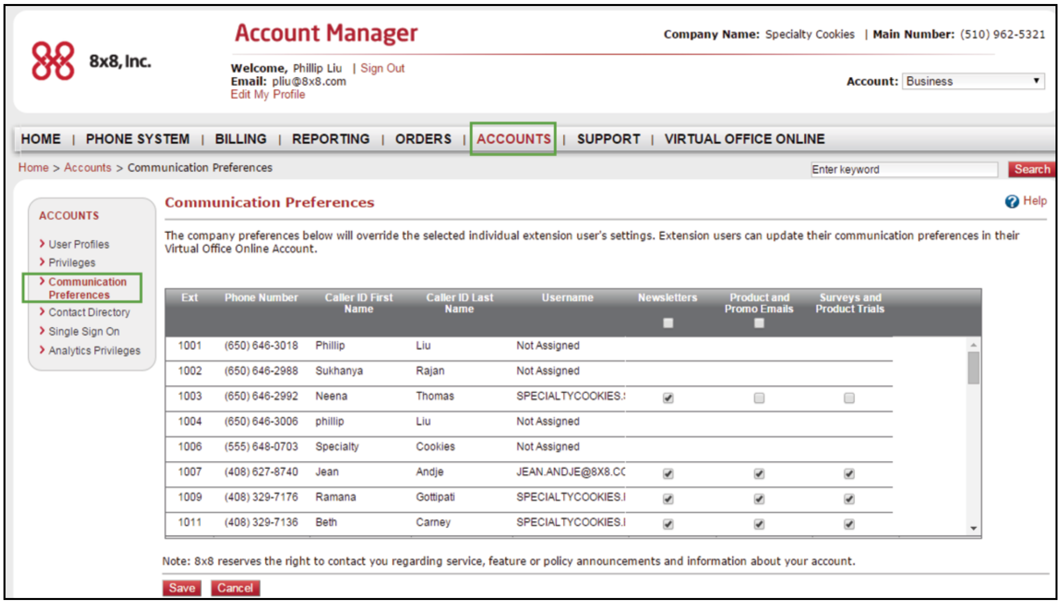
Click **Go to Branches** to define or edit a branch code.

Voicemail Password Length Setting

In **Voicemail Password Length Setting**, you can set the minimum required length for voicemail passwords. The minimum chosen also affects passwords for Ring Groups and Call Queues. Changes to this setting do not impact existing passwords, but take effect the next time the password is changed.

Communication Preferences

Go to **Accounts > Communication Preferences** to configure the company's preferences at the PBX or extension level. The settings override the selected individual extension user's settings. Extension users, however, can update their preferences in the Virtual Office desktop app.



Request Number Transfer

You can transfer your existing phone numbers from another service company to 8x8. Using the Account Manager **Number Transfer Request** feature, you can:

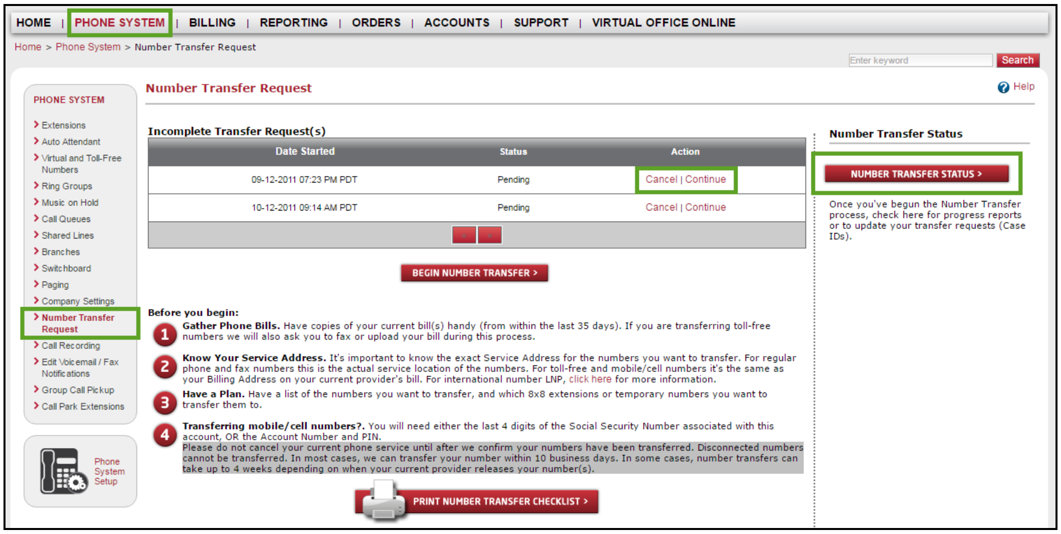
- Check the transfer status of numbers being ported.
- Begin the number transfer.
- Cancel a current number transfer request.

Check Number Transfer Status

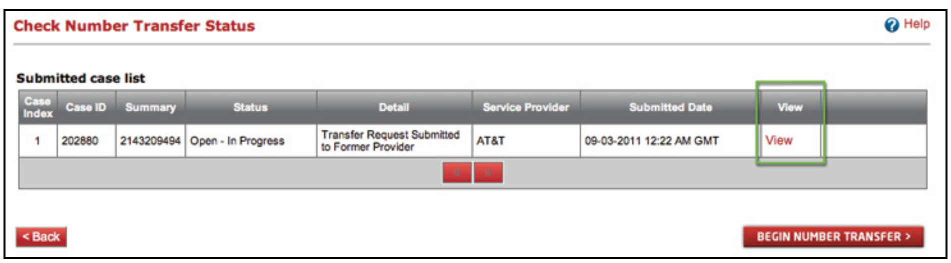
To access your number transfer status in Account Manager:

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Number Transfer Request**.

3. Click **Number Transfer Status**.



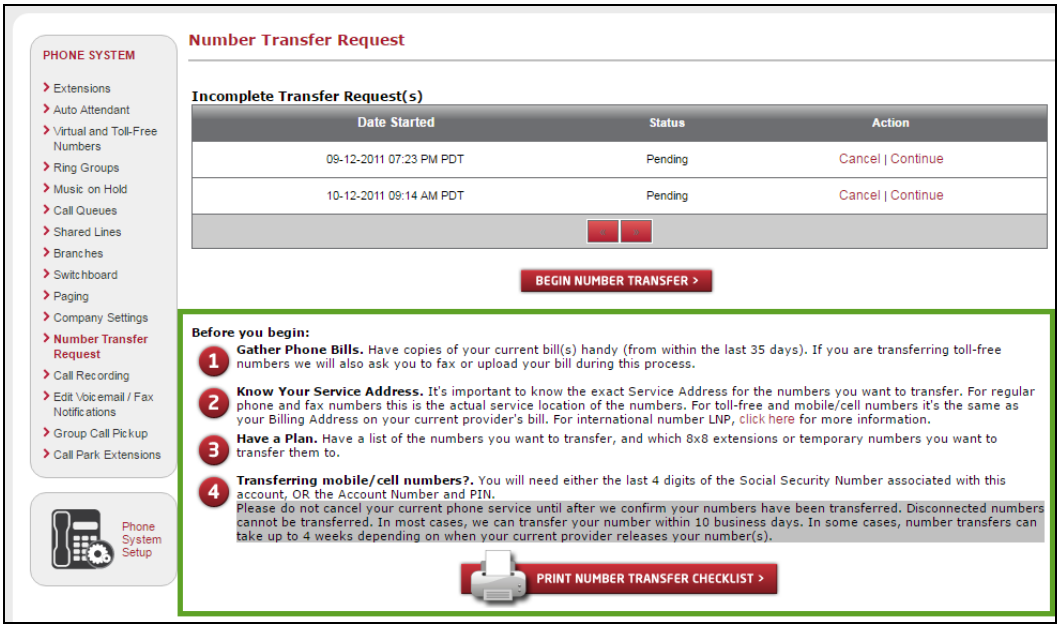
4. Click **View** to see details about a case.



Request a Number Transfer

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Number Transfer Request**.
3. If you started the request before, click **Continue** in the **Action** column of the page.
   You are able to resume your number transfer request from the point you stopped.
4. Review the onscreen instructions and the 8x8 Number Transfer Checklist to ensure you have all required information ready before you request a number transfer. Click **Print Number Transfer Checklist** to review and

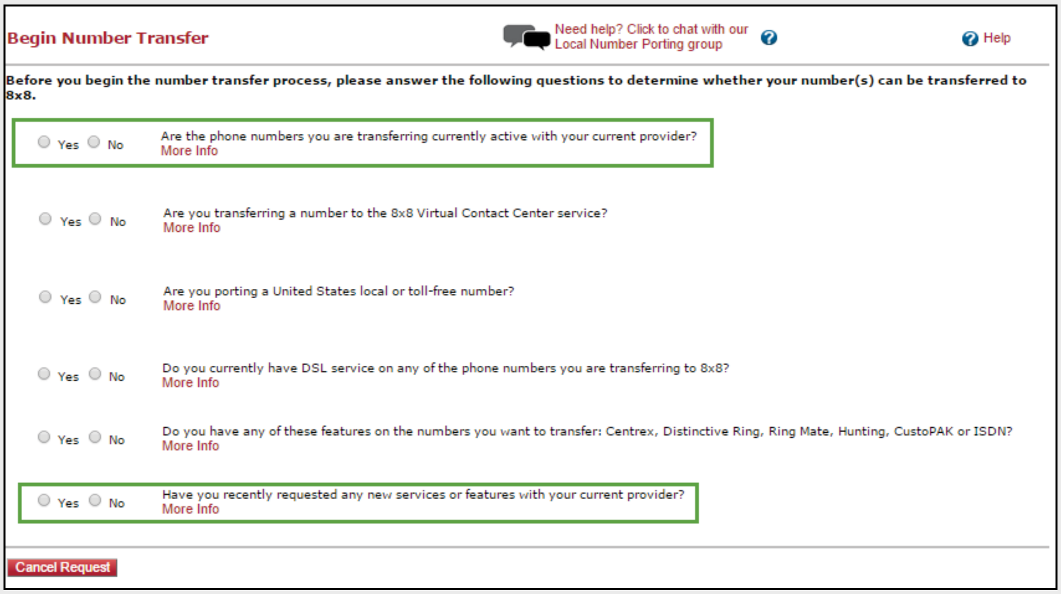
print the checklist for future use.



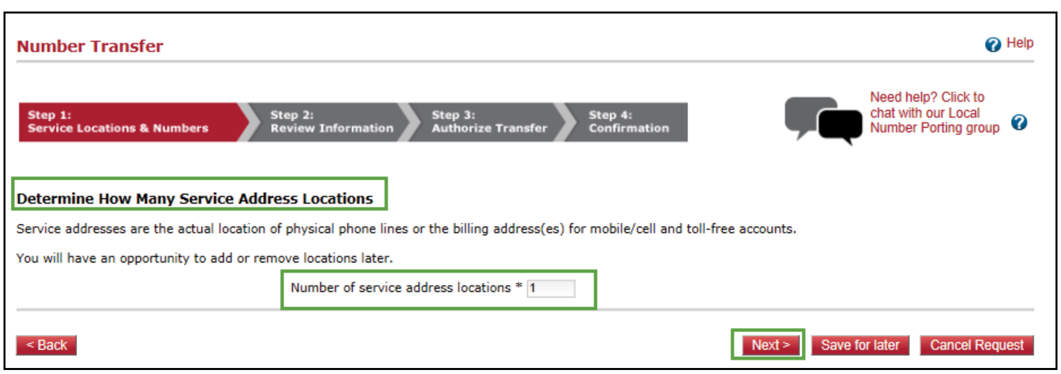
5. When you have gathered all the required information, click **Begin Number Transfer**.

6. Answer the questions on the **Begin Number Transfer** page.

Note: The answer to the first question must be **Yes**, and the answer to the last question must be **No** in order for your requested transfer to go through.

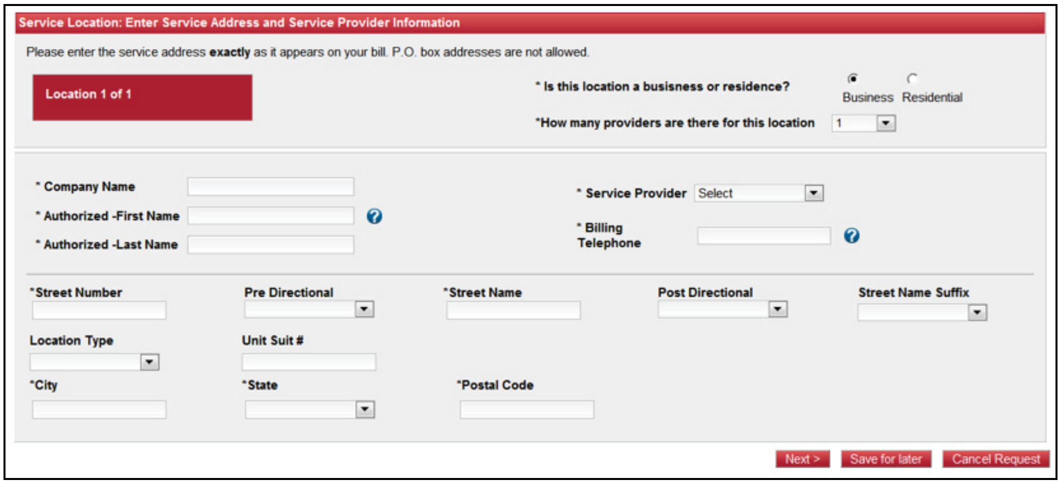


7. Once you answer all the questions, click **Continue**.
8. Enter the number of service locations for the phone numbers.



9. Click **Next**.

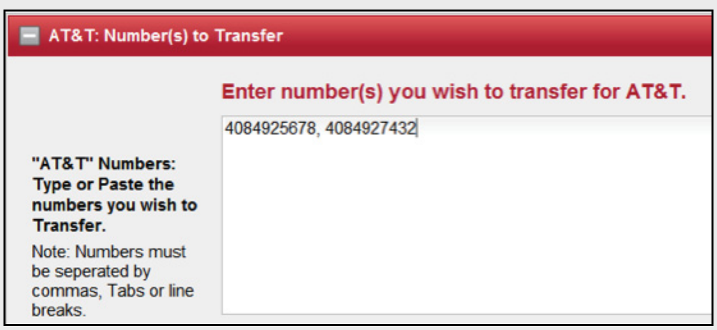
10. Enter the service address and service provider information for the number you want to transfer.



11. Click **Next**.

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

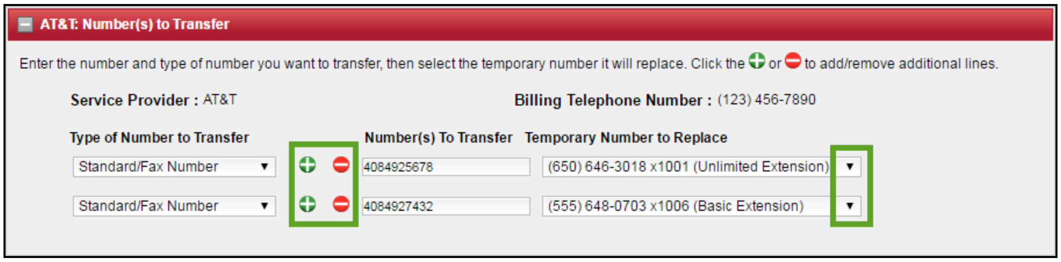
Note: You must separate the numbers using commas, tabs, or line breaks.



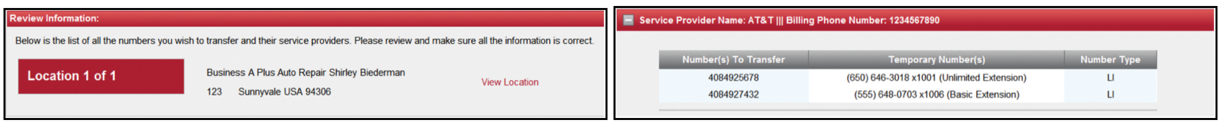
13. Click **Next**.

14. Click the drop-down arrow to select a temporary number for each of the numbers you are transferring.

    Use and to add and delete phone numbers.



15. Click **Next**.
16. Review the information you provided to ensure it is correct. To edit any of the information, click **Back**.

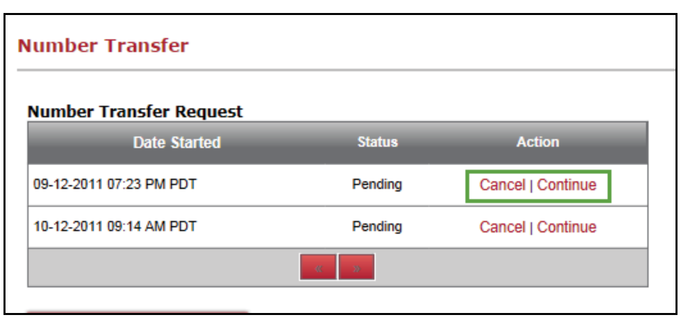


17. Click **Next**.
18. Review the Letter of Authorization carefully. We recommend you print it for your records using the button provided. If you agree to all terms in the letter, click **I Agree**.

Note: You can select **Save for Later** after every step to complete the number transfer request later.

Canceling a Number Transfer Request

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Number Transfer Request**.
3. To cancel a number transfer request, click **Cancel** in the **Action** column.

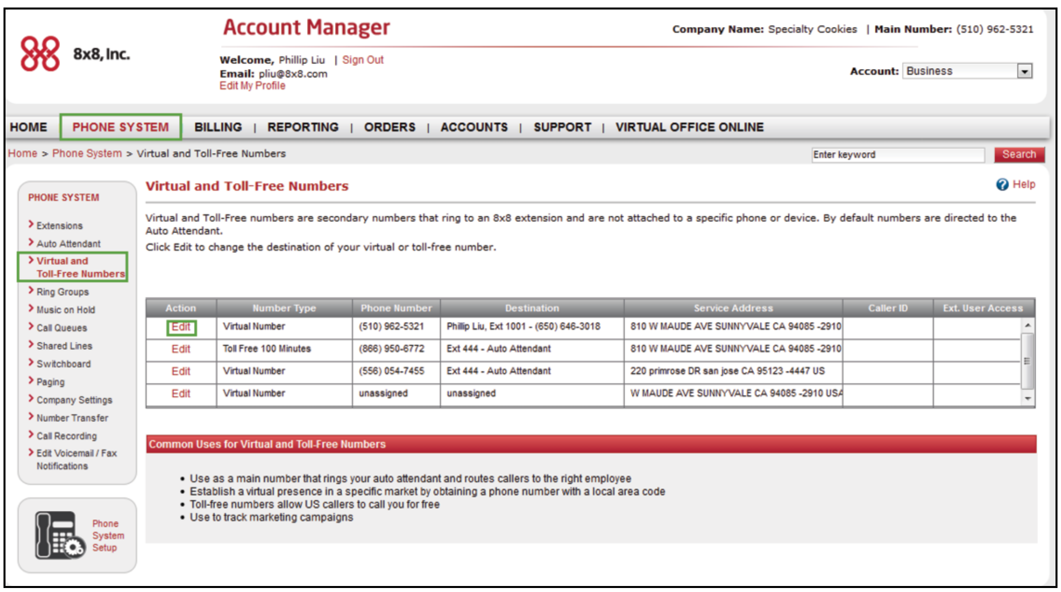


Configure Virtual and Toll-Free Numbers

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. In order to change the destination of these numbers to a ring group, call queue, individual extension, fax, or Virtual Office Meetings, use the **Virtual and Toll-Free Numbers** feature.

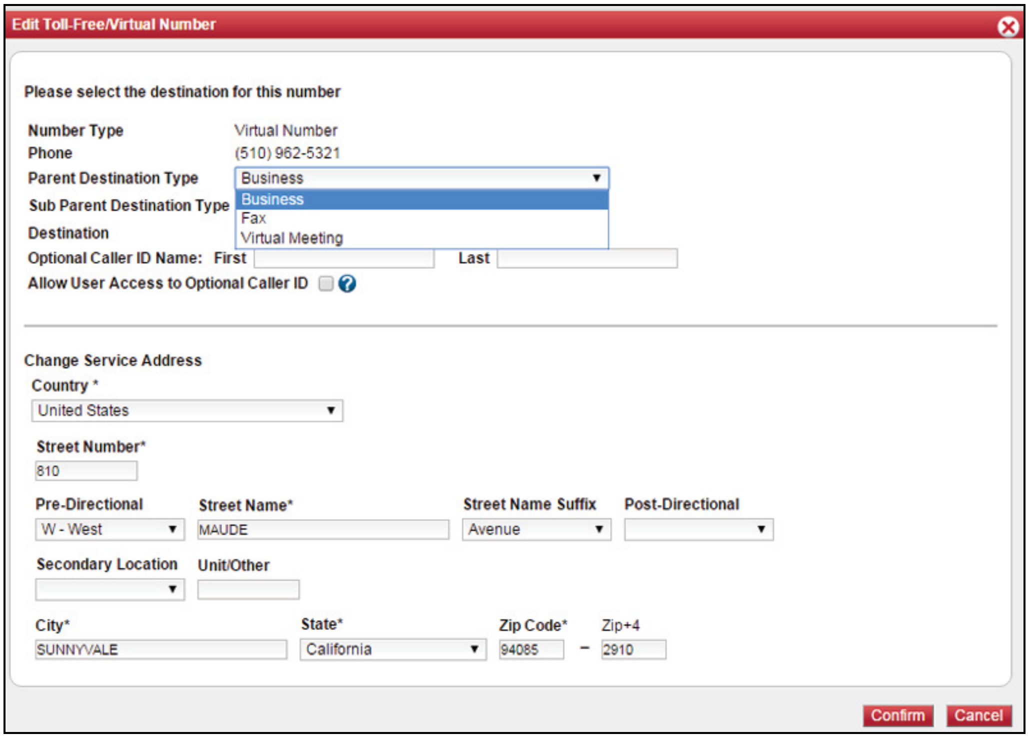
To change the destination of a virtual or toll-free number:

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Virtual and Toll-Free Numbers**.
3. Click **Edit** to change the destination of the desired virtual or toll-free number.



4. From the **Parent Destination** drop-down, select the destination type you want to associate this number with:
   - **Business**: The number becomes available for any of the following services:
     - Auto Attendant
     - Ring group (must be configured first)
     - Call queue
     - Individual extension

- **Fax**: The number becomes available for the Virtual Fax extension. Fax extension is available on Virtual Office Pro.
- **Virtual Meeting**: The number becomes available for use as a Virtual Office Meetings dial-in number. Virtual Office Meetings is available on Virtual Office Pro.



5. From the **Sub Parent Destination Type** drop-down, select a service type (such as call queue or ring group) associated with this number.
6. Select an **Optional Caller ID Name**.
7. Select **Allow User Access to Optional Caller ID**.
   This option allows the extension user to access the caller ID number from the Virtual Office desktop app. If selected, the optional caller ID number is displayed on each outbound telephone call made from this extension.
8. Enter a new location, or **Change Service Address**.
   The service address describes a detailed location required by the emergency service providers.
9. Click **Confirm**.

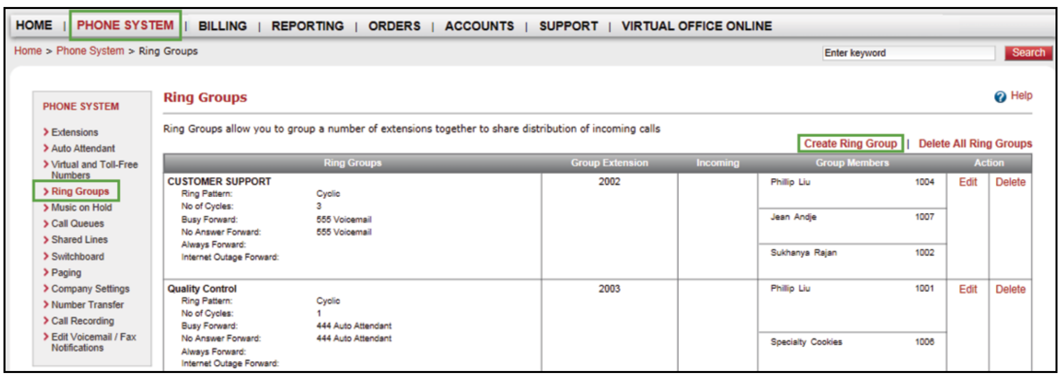
Create Ring Groups

Ring groups allow you to group a number of extensions together to share distribution of incoming calls. When a number or extension is dialed, multiple phones ring. It is a great way for a business to share the distribution of incoming calls among employees.

Note: If a Cost Center is bound to a Branch, selecting the Branch results in a read-only Cost Center field. However, if there is no Cost Center bound to the selected branch, the Cost Center must be selected manually.

Create Ring Groups

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Ring Groups**.
3. Click **Create Ring Group**.



4. Enter or select **Ring Group** details, and make changes as desired through the **Ring Group Details** window.

Note: If you would like Virtual Office to suggest an extension number for the ring group, click **Suggest** next to **Ring Group Extension**.

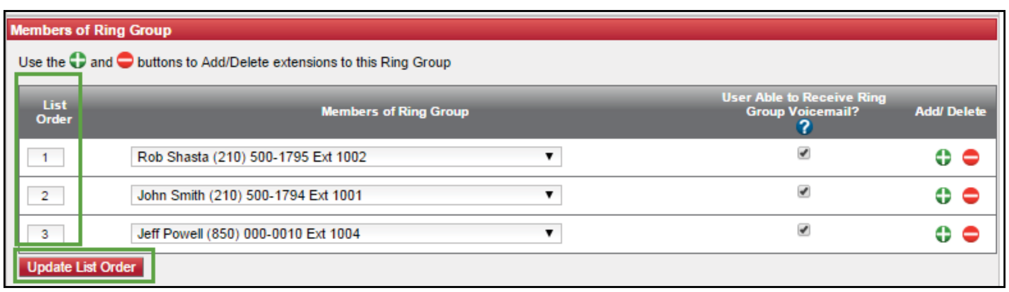
5. For voicemail password, enter a password that meets the security guidelines. Ring group members use this password to access the voicemails directed to the ring group.

Voicemail Password Security Guidelines

To secure your voicemail password, the following password restrictions are enforced. The password:

- Should be 4-15 digits long.
- Should not use same digits such as 1111, 2222.
- Should not use years from 1900 till present.
- Should not be of ABAB format such as 1010, 2121,3131.
- Should not use sequential numbers such as 1234, 4567.
- Should not use easy to key in numbers from the center of keypad. The following numbers are not allowed - 2580, 0582, 5683 (spells LOVE).

6. Under **Members of Ring Group**, you can:
   - Click the drop-down arrow to select an extension number.
   - Click and to add or delete extensions.
7. To change the order a call goes to in a ring group, you must change the list order for the extensions in the ring group, you can:
   - Enter a new number in the **List Order** field, such as 1, 2, 3, etc.
   - Click **Update List Order**.

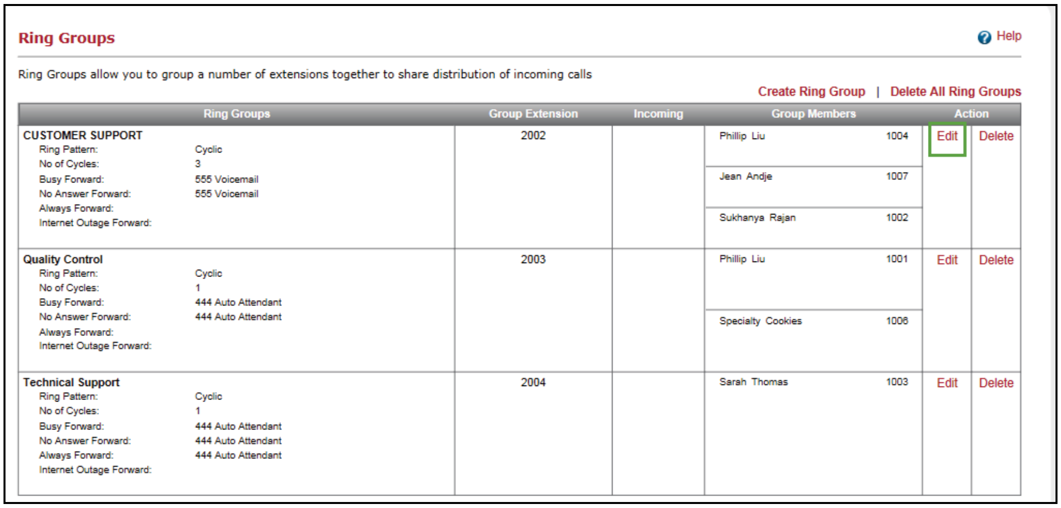


   - Click **Save**. The list order for that ring group is changed.

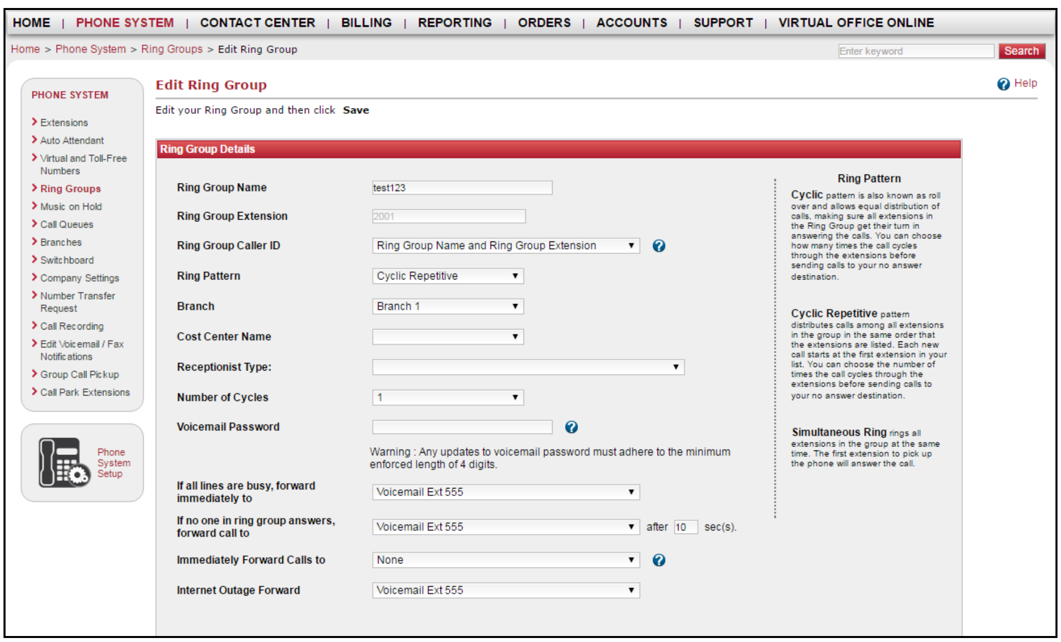
Edit Ring Groups

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Ring Groups**.

3. Locate the ring group you want to change, and click **Edit**.



4. Edit the **Ring Group Details**.

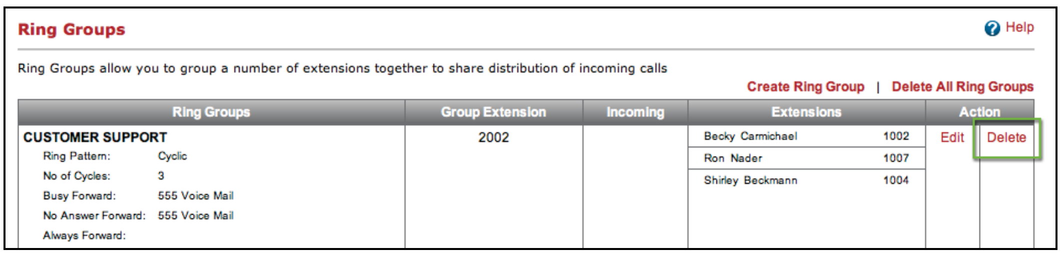


5. Under **Members of Ring Group**, click and to add or delete extensions.

6. If you want to change the list order for the extensions in the ring group:
   - Enter a new number in the **List Order** field, such as 1, 2, 3, etc.
   - Click **Update List Order**.
7. Click **Save**.

Delete Ring Groups

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Ring Groups**.
3. Locate the ring group you want to remove, and click **Delete**.



4. When the dialog box appears confirming the deletion, click **OK.**

Access Music on Hold

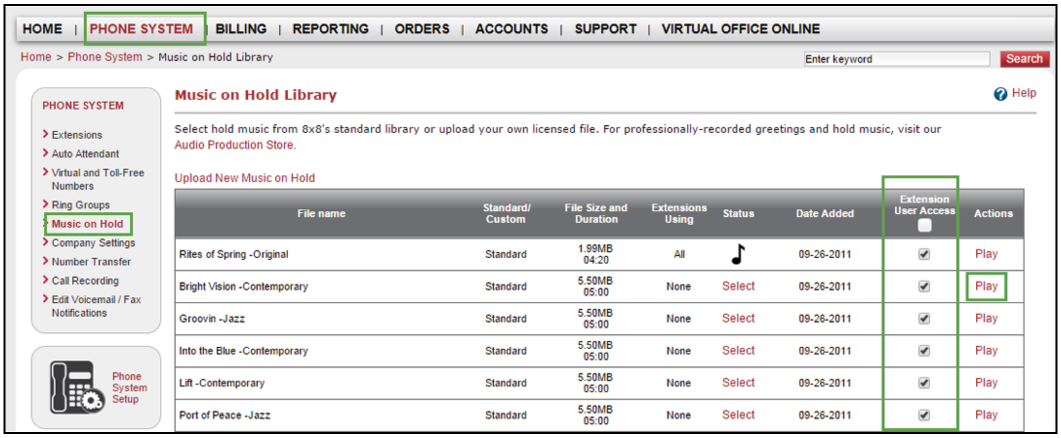
You can play music or a message when you place a caller on hold.

The Virtual Office desktop app allows users to select their own music on hold from the **Music on Hold** library. As an administrator, you can select which music is available to extension users, select the default music on hold for extensions where no music has been selected, and upload new music to the **Music on Hold** library.

Provide Extension User Access to Music on Hold

1. Click **Phone System** in the top navigation bar.

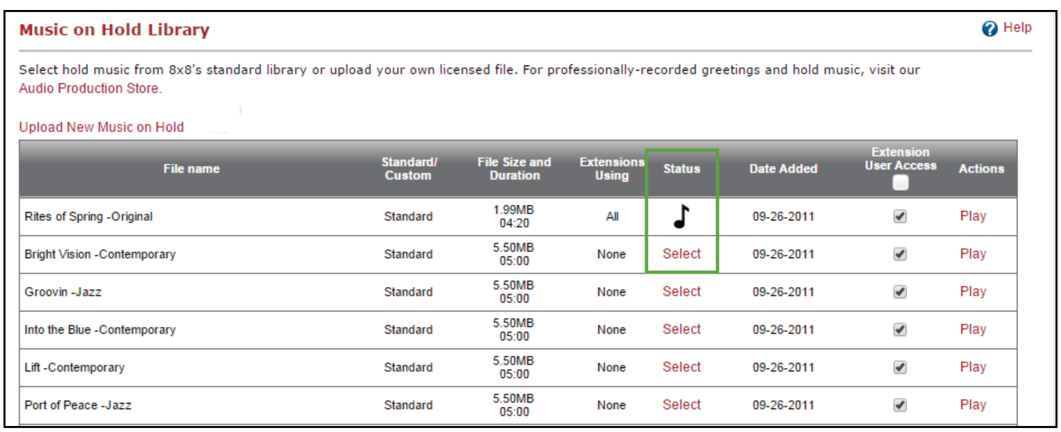
2. Under the **Phone System** menu, click **Music on Hold**.



3. Review the music listed. To hear a sample, click **Play**.
4. Select the **Extension User Access** check box to enable users to select **Music on Hold** for their own extensions.
5. Click **OK**. Your selected phone extensions now have access to **Music on Hold**.

Select Default Music on Hold for Extensions

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Music on Hold**.



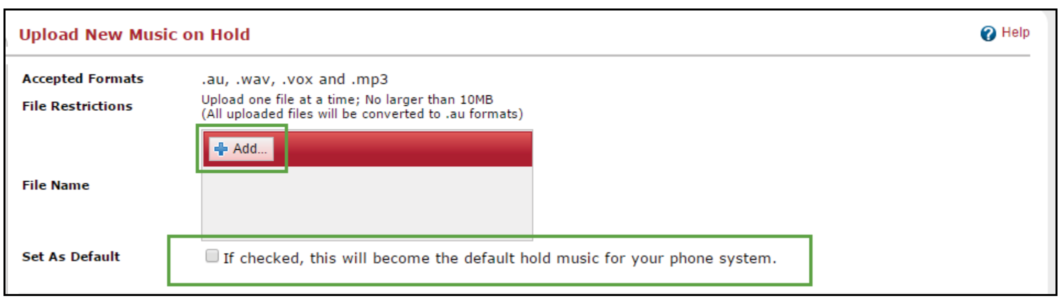
3. Review the music listed. To hear a sample, click **Play**.
4. When you have made your selection, click **Select**. This music will become the default hold music for all extensions.

Note: Your selection shows  in the **Status** column. You can only make one music file the default music for all extensions in your phone system. However, extension users can change their default hold music in the Virtual Office desktop app.

5. When the dialog box appears confirming your selection, click **OK**.
6. Click **Save**.

Upload New Music on Hold

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Music on Hold**.
3. Click **Upload New Music on Hold**.
4. Click **Add** and select the music file from your computer.

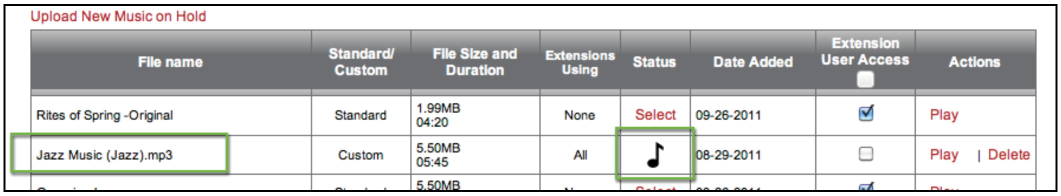


5. Click **Upload**.
6. If you want to make this music file the default music on hold for your phone system, select the check box at the bottom.

Note: This does not override the music on hold other users have selected in the Virtual Office desktop app. It only applies to extensions where no hold music has been selected.

7. Review the text in the **Electronic Signature** field. Click **I Agree**.

8. The music you uploaded now appears in the **Music on Hold** library, with ♪ indicating that it is the default music on hold.


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	☑	Play
Jazz Music (Jazz).mp3	Custom	5.50MB 05:45	All	♪	08-29-2011	☐	Play | Delete
		5.50MB					

Set up Group Paging

8x8 Virtual Office offers two types of paging:

- **Group Paging**
- **Overhead Paging**: This is an additional service that can be purchased separately. For more information, refer to Set up Overhead Paging.

Group Paging

Provides one-way paging to multiple extensions connected to the same router. Make real-time announcements to a department, team, or work area using the intercom feature on a Polycom phone:

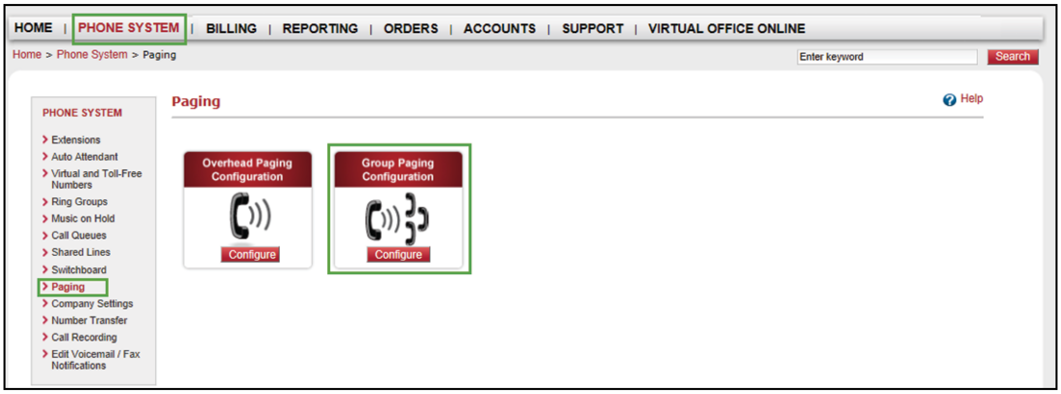
- Create and manage your paging groups using 8x8 Account Manager.
- Create up to 25 paging groups; the same extension can be included in multiple groups.
- Define who can broadcast pages and who can only listen.
- Set priority levels for your pages: **Normal**, **Priority**, and **Emergency**.

> **Notes:**
> -Polycom firmware version 4.0 or higher is required.
> -Group paging uses IP multicast to send group pages to registered phones. This technology requires that all phones in a group page must have access to the same multicast IP address. In most cases, this requires that all phones receive their IP address from the same router. Geographically-dispersed phones that are serviced by separate routers will not support uniform access to intercom group paging.

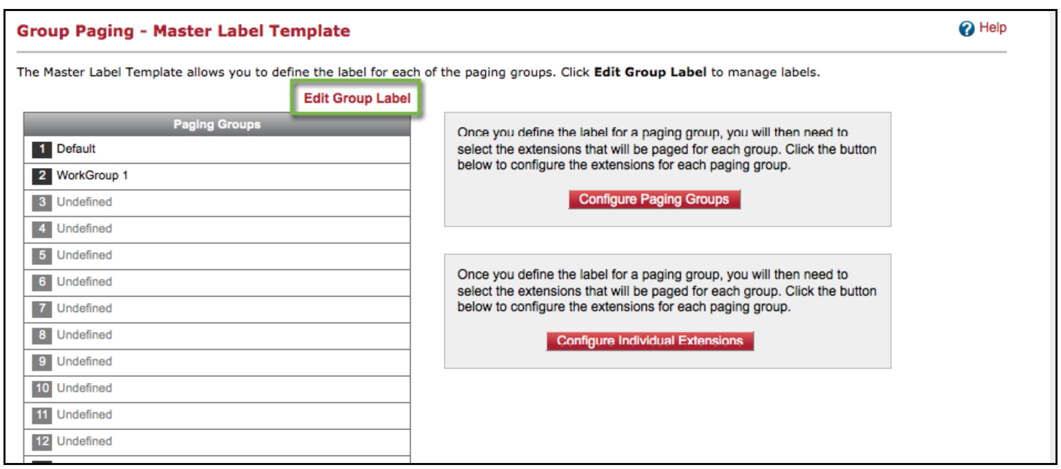
Before using group paging, each telephone participant must be configured.

To set up group paging on the Polycom VVX500:

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Paging**.
3. On **Group Paging**, click **Configure**.

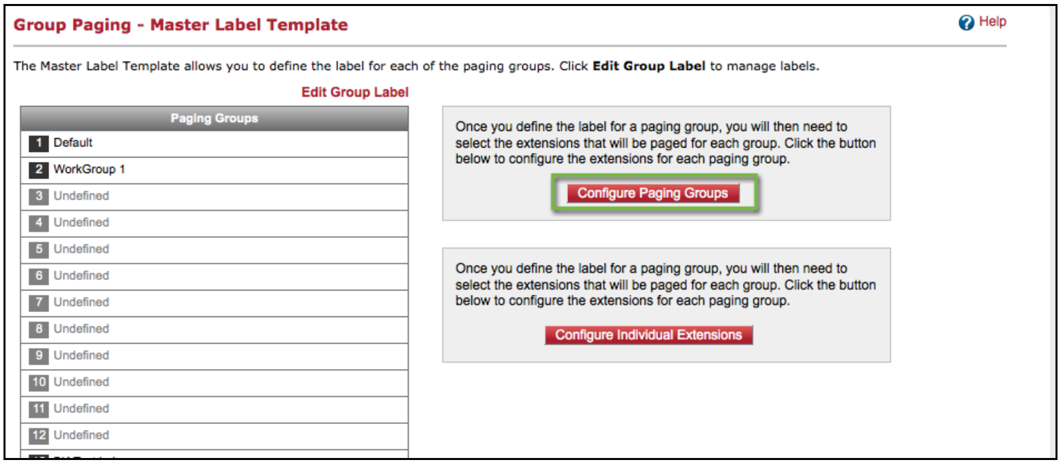


4. To create a name or label for the group, click the **Edit Group Label** link. Then enter a new group name. In our case, we have created a group called **WorkGroup 1**.

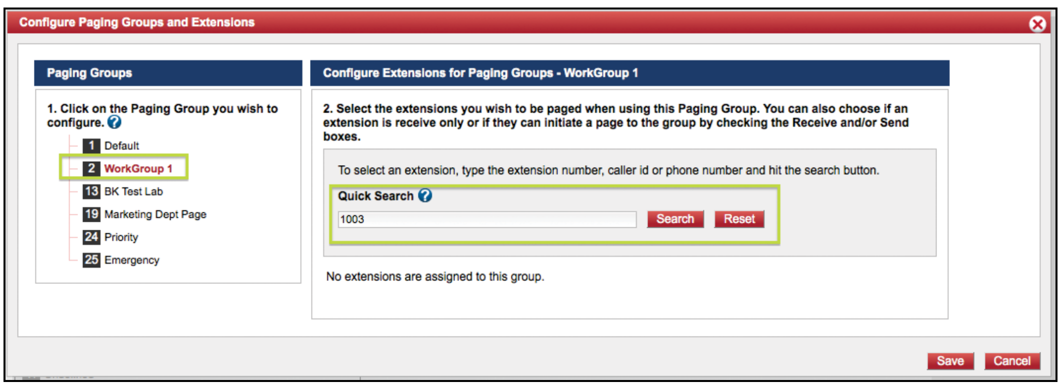


5. Click **Save** at the bottom of the window.

6. Click **Configure Paging Groups**.

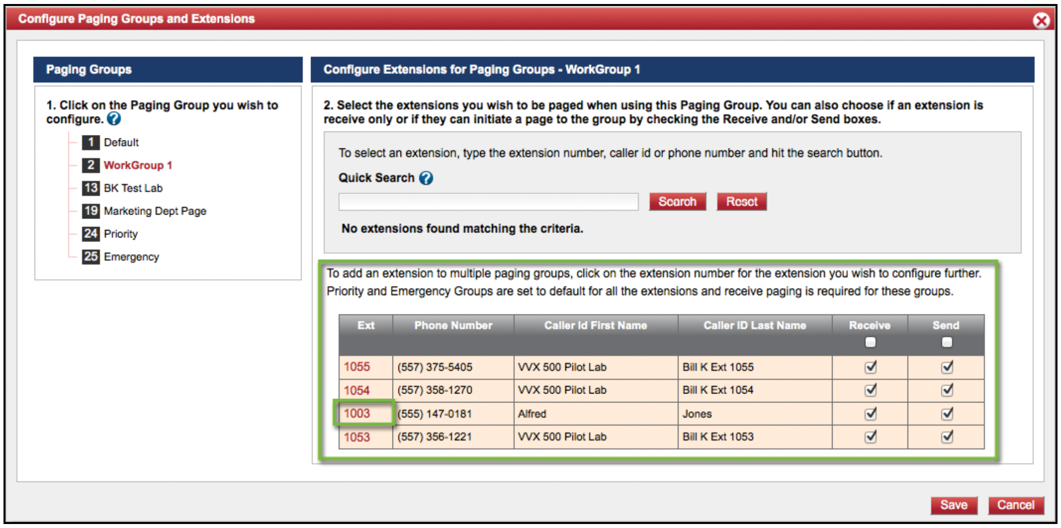


7. Select the new group (in this case, **WorkGroup 1**) from **Paging Groups**. Make sure it becomes highlighted. Next, select the extension that participates in the group by searching and selecting the extension numbers.

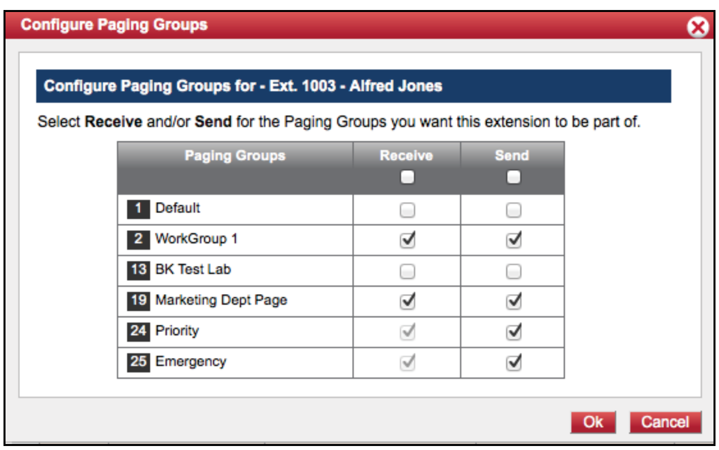


- ## Example 1

  In this example, four extensions have been included in the group. As highlighted, the user has selected extension 1003 for the detailed configuration. On extension 1003, the user has selected the ability to send and receive two normal groups and the ability to send in **Priority** and **Emergency** groups.

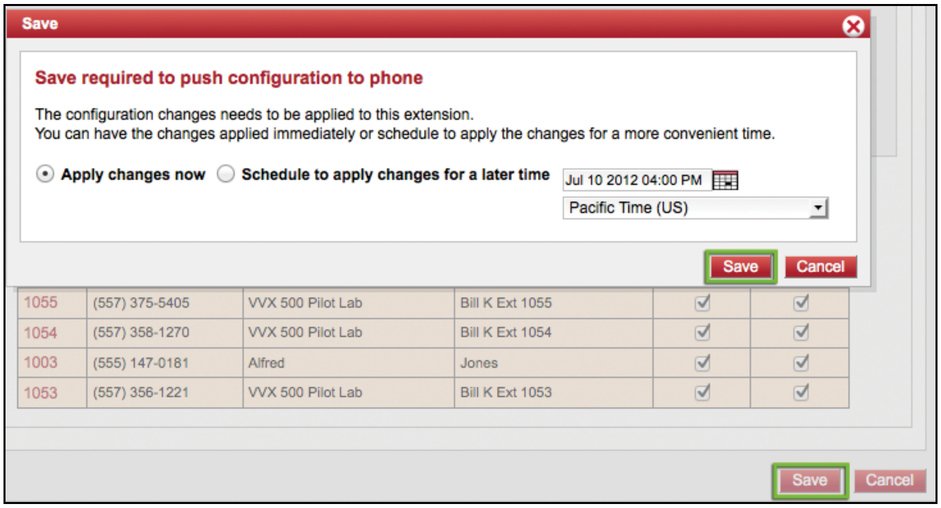


Note: You cannot unsubscribe from a **Priority** or **Emergency** group. A Priority page interrupts **Normal** pages or active calls. An Emergency page will interrupt Normal pages, Priority pages, and active calls and plays out at near maximum volume even if **Do Not Disturb (DND)** is enabled.

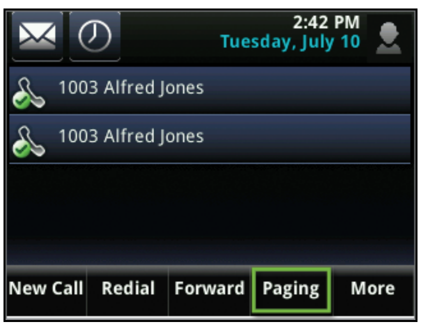


- **Example 2**

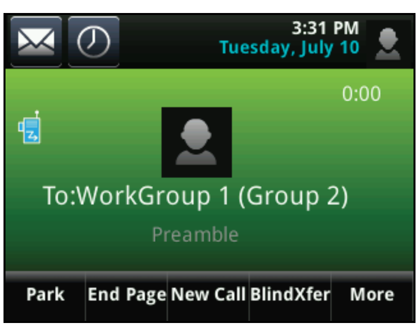
In this example, the user has configured extensions 1003, 1055, 1054, and 1053, and can now save the configuration. Users are given the option to save now or save at a time when it is more convenient to restart the phone.



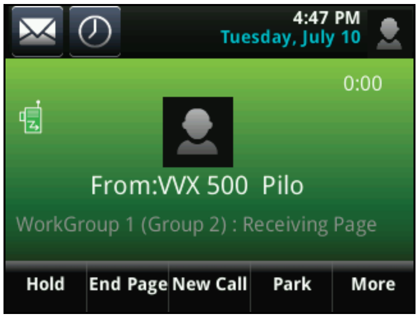
When a user returns to their Polycom VVX500 desktop phone, they can see **Paging** among the screen menus as well as the paging group list. The new group (in this case, **WorkGroup 1**) is active, as shown below.



Making a page from a Polycom VVX500 shows a preamble screen. During the preamble, the phone has located all the phones in the page and is sending a short tone to all the phones in the group page.



The phone quickly transitions to paging mode. At this point, a user can speak into the handset or speakerphone and a one-way page is transmitted to all participants. Receiving a page shows the name of the group page and the status.



Configure Voicemail and Fax Notifications

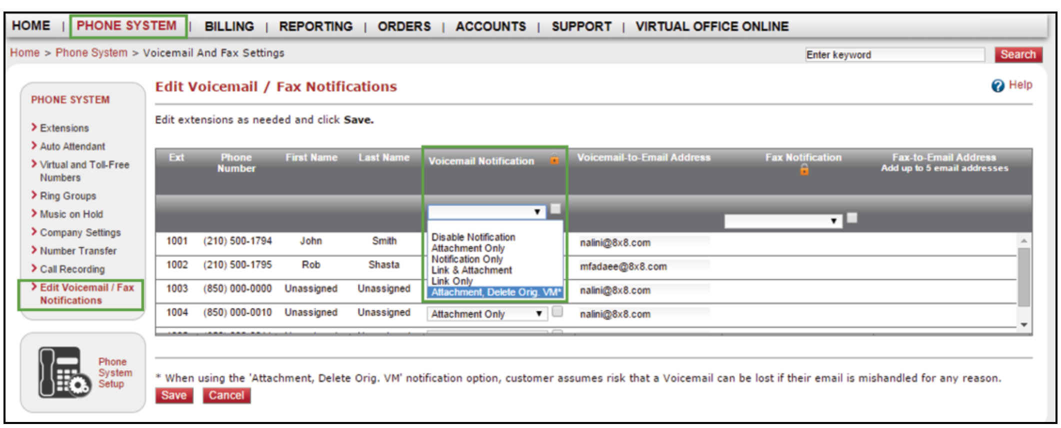
Extension users can receive an email notification when they receive a new voicemail message or Internet Fax. Internet Fax is available with Virtual Office Pro.

Manage Voicemail and Fax Notifications

There are several email notification options available. Extension users can manage their notification options using the Virtual Office desktop app. Using Account Manager, system administrators can also manage notification settings and prevent extension users from making any changes to settings.

Configure Voicemail and Fax Notifications

1. Click **Phone System** in the top navigation menu.
2. Under the **Phone System** menu, click **Edit Voicemail/Fax Notifications**.



3. In the drop-down boxes in the **Voicemail Notification** and **Fax Notification** columns, select the appropriate option for each extension. The same option can be applied to all extensions using the drop-down box in the header row. You can see the following choices under **Voicemail** and **Fax Notification**:
   - **Disable Notification**: No email notification is sent.
   - **Attachment Only**: An email notification is sent with an attached audio file of the voicemail.
   - **Notification Only**: An email notification is sent without an audio file or link to the voicemail (recommended for companies requiring HIPAA compliance).
   - **Link & Attachment**: An email notification is sent with both a link to the voicemail and an audio attachment, as well as links to delete voicemail and to manage multiple voicemails.
   - **Link Only**: An email with a link to the voicemail is sent, as well as links to delete voicemail and to manage multiple voicemails.
   - **Attachment, Delete Orig. VM***: An email notification with an attachment to the voicemail is sent. The original audio file of the voicemail will be deleted.
4. Select the check box next to a setting if you would like to lock it. If locked, users cannot personally change their notification settings.

   Note: According to HIPAA guidelines, it is considered unsafe to send an attachment that can be forwarded. Therefore, administrators should set users to **Notification Only**. Be sure to lock the setting so that users cannot change this setting from the Virtual Office desktop app.

5. Click **Save**.

Add-On Features

8x8 provides the following additional services and features. Contact your 8x8 sales representative to learn more about the following:

- Overhead Paging
- Call Queues
- Branches
- Barge-Monitor-Whisper (BMW)
- Power Keys
- Shared Lines

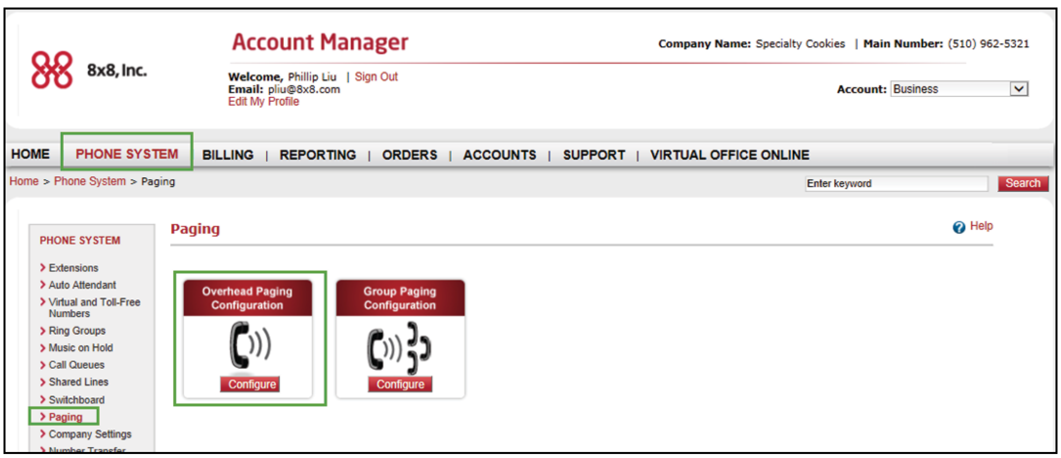
- Switchboard Pro
- Call Park Extensions
- Group Call Pickup
- Hot Desk

Set up Overhead Paging

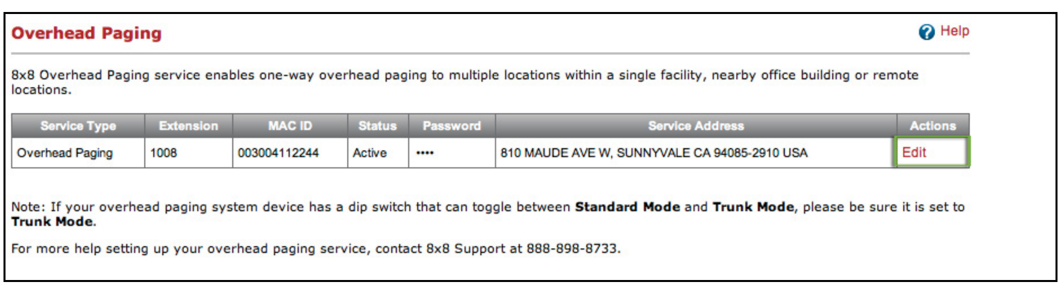
Overhead paging provides one-way paging to multiple locations within a single facility, nearby office building, or remote locations. Overhead paging is an optional feature that can be purchased separately.

To set up overhead paging:

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Paging**.
3. On **Overhead Paging Configuration**, click **Configure**.

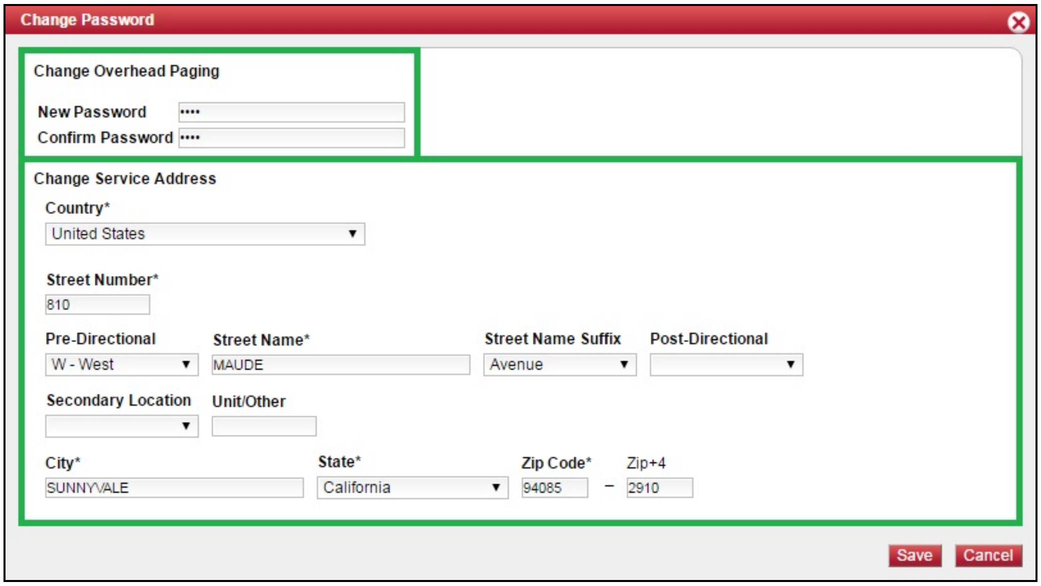


4. Locate the extension you want to modify, and click **Edit**.



5. The **Change Password** dialog box appears. Change the overhead paging password, if desired.

6. Change the service address information, if applicable.



7. Click **Save**.

Manage Call Queues

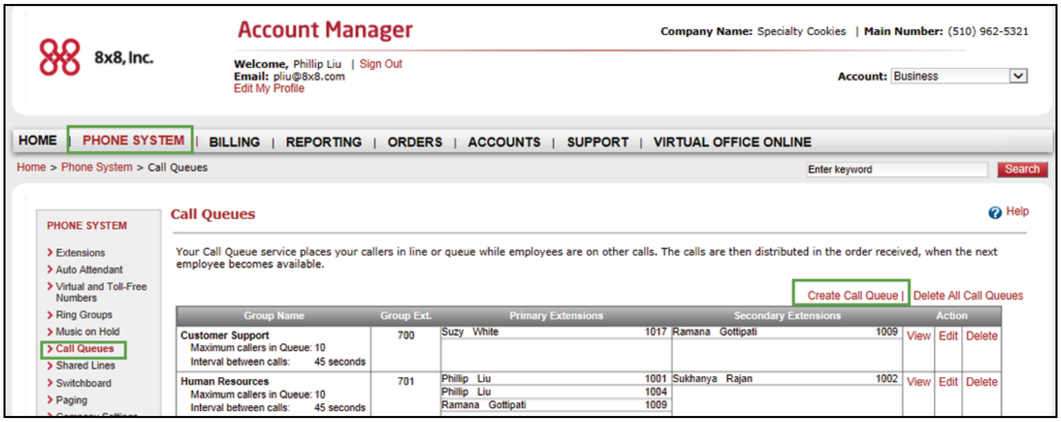
A Call Queue places callers in a queue while agents handle other calls. The calls are then answered in the order received as agents become available. Call Queues is an optional add-on feature that can be purchased separately.

Note: If a Cost Center is bound to a Branch, selecting the Branch results in a read-only Cost Center field. However, if there is no Cost Center bound to the selected branch, the Cost Center must be selected manually.

Create Call Queues

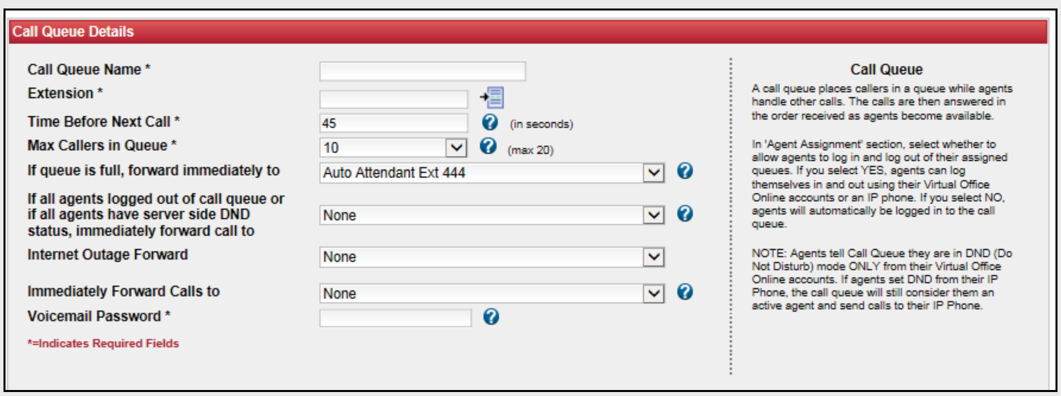
1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Call Queues**.

3. Click **Create Call Queue**.



4. Enter the **Call Queue Details**, including selecting an extension number. The * indicates required information.

Note: If you would like the system to suggest the next available extension number, click next to **Extension**.



5. For voicemail password, enter a password that meets the security guidelines. Ring group members use this password to access the voicemails directed to the ring group.

Voicemail Password Security Guidelines

To secure your voicemail password, the following password restrictions are enforced. The password:

- Should be 4-15 digits long.
- Should not use same digits such as 1111, 2222.
- Should not use years from 1900 till present.
- Should not be of ABAB format such as 1010, 2121,3131.
- Should not use sequential numbers such as 1234, 4567.
- Should not use easy to key in numbers from the center of keypad. The following numbers are not allowed - 2580, 0582, 5683 (spells LOVE).

6. Under **Agents Assignment**, assign agents to the call queue.
   - Select whether to **Allow agents to log in and log out of their assigned queues**.

     Note: If you select **Yes**, agents can log themselves in and out using the Virtual Office desktop app or an IP phone. If you select **No**, agents are automatically logged in to the call queue.

   - Select a **Primary Extension** number from the list.
   - Select a **Secondary Extension** number from the list.

     Click or to add or delete extensions.

     Note: You can assign a group of agents to both a primary and secondary queue extension. The secondary extension group can be set up to handle overflow calls from the primary extension group. If all agents on the primary and secondary extension groups are busy and the maximum number of calls in the queue is reached, the next call is forwarded to the queue voicemail box.

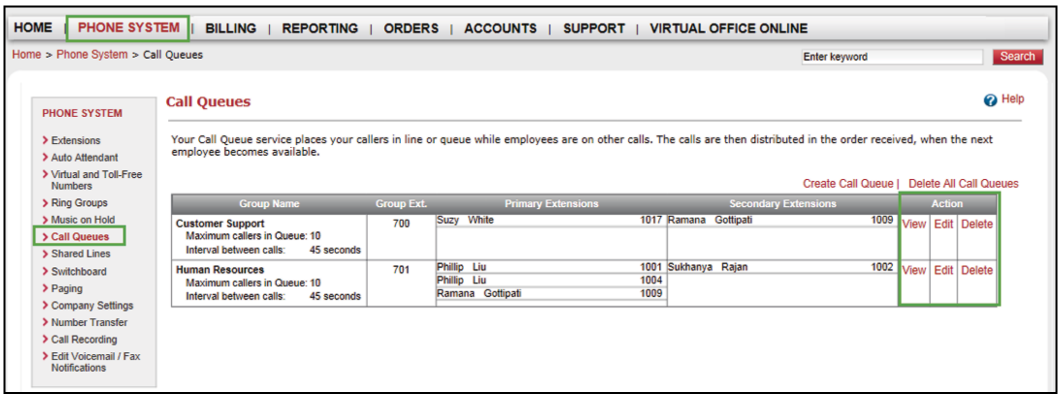
7. Select whether the primary extension receives voicemail.

8. Click **Save**.

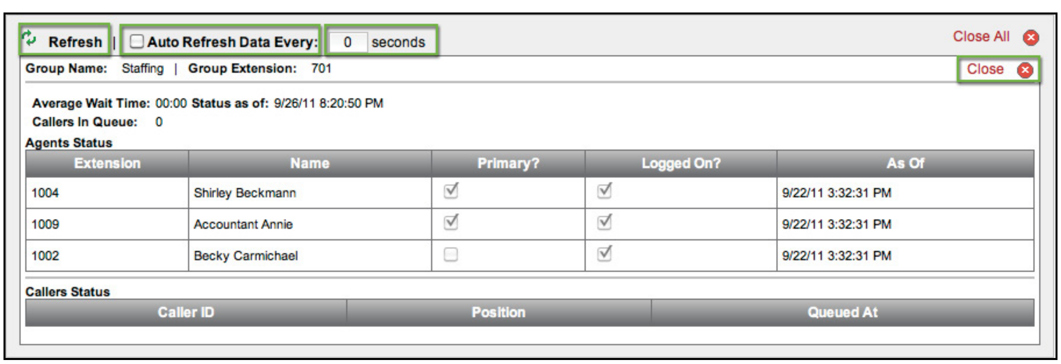
> **Note:** In order to upload or record greetings, you must first create your profile and then edit it to enable those features.

View Call Queues

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Call Queues**.
3. **Click View** in the **Action** column for the call queue you want to see.

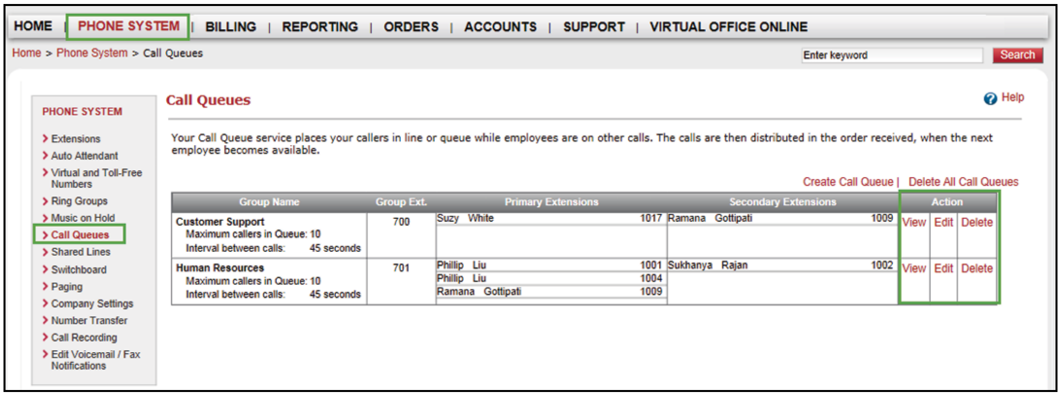


4. Both agent and caller status is displayed.
5. Click **Refresh**.
6. If you want the display to refresh automatically:
   - Select the **Auto Refresh Data Every** check box.
   - Enter how often you want the display to refresh. The default is 20 seconds.
7. Click **Close** to close the display.



Edit Call Queues

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Call Queues**.
3. Click **Edit** in the **Action** column for the call queue you want to change.



4. Edit **Call Queue Details**.
5. Under **Agents Assignment**, you can:
   - Select or clear the radio button controlling whether to allow agents to log in and out of their assigned queues.

     > **Note:** If you select the radio button, agents can log themselves in and out using the Virtual Office desktop app or an IP phone. If you clear the radio button, agents will automatically be logged in to the call queue.

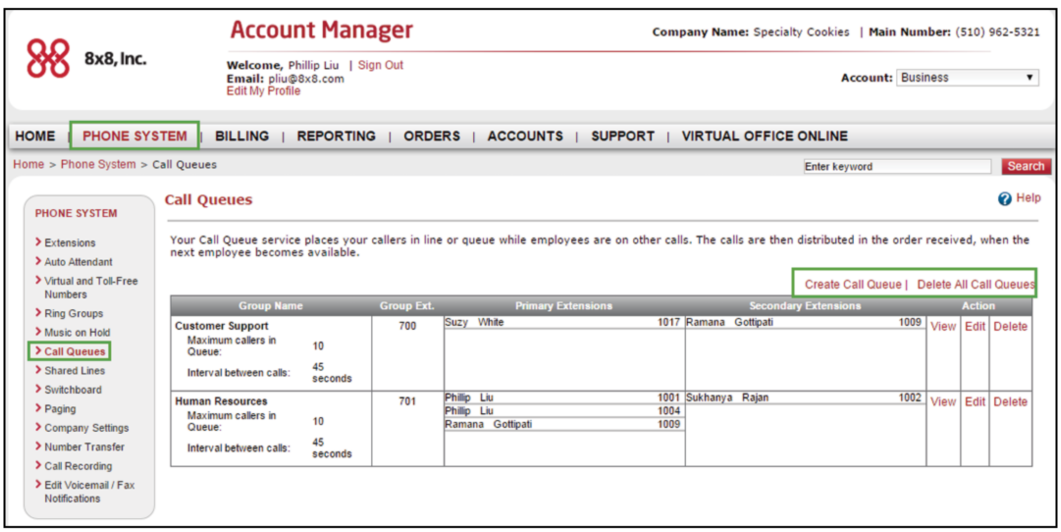
   - Click the **Primary Extension** drop-down arrow to select different extensions.
   - Click and to add and delete primary extensions.
   - Click the **Secondary Extension** drop-down arrow to select different extensions.
   - Click and to add and delete secondary extensions.

6. Select whether the primary extension receives voicemail.

7. Upload or record an initial greeting that callers hear when they enter the call queue, if all agents are busy.

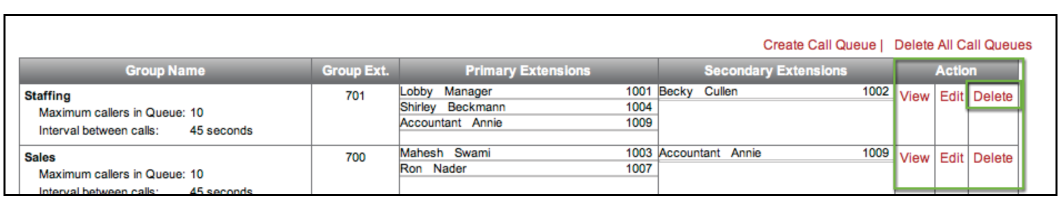
Delete Call Queues

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Call Queues**.
3. To delete all call queues:
   - Click **Delete All Call Queues**.



   - When the dialog box appears to confirm your deletion, click **Delete All**.

4. To delete an individual call queue, Click **Delete** in the **Action** column of the call queue you want to remove.

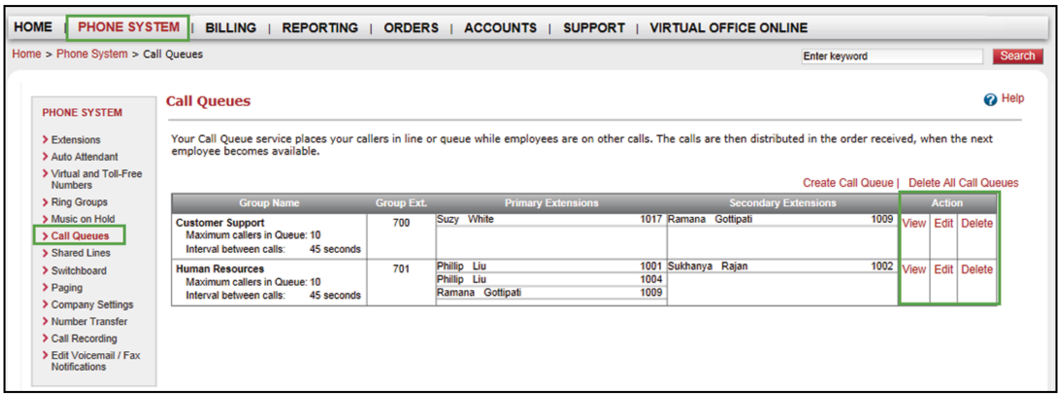


Initial Queue Greeting

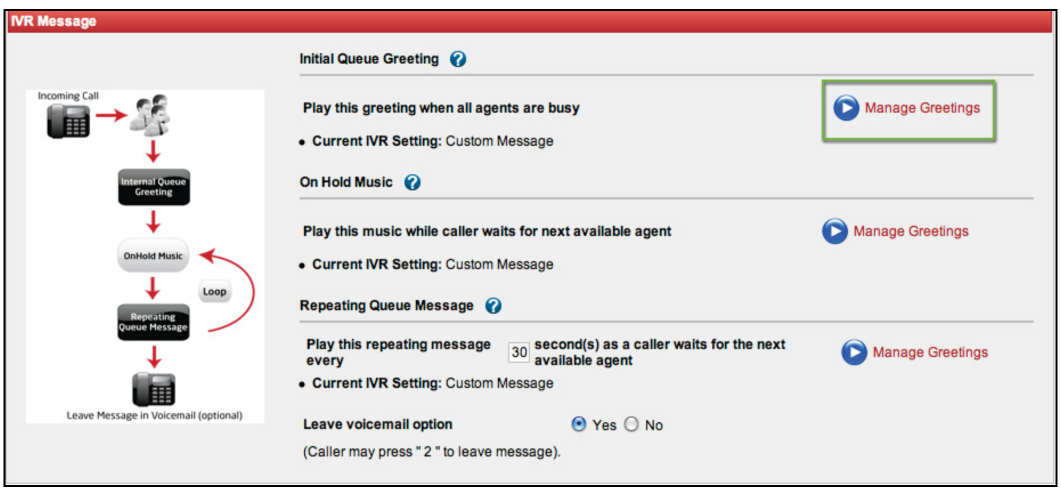
The initial queue greeting is played when a caller first joins the queue. If all agents on the primary and secondary queue extension groups are busy and the maximum number of callers on the queue has not been reached, the next caller hears the initial queue greeting.

Upload an Initial Queue Greeting

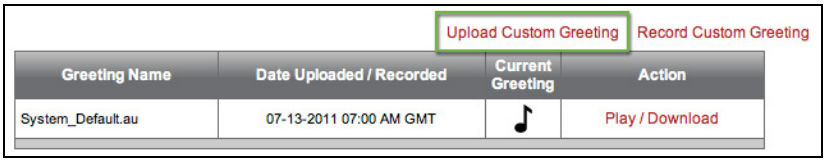
1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Call Queues**.
3. Click **Edit** in the **Action** column for the call queue you want to change.



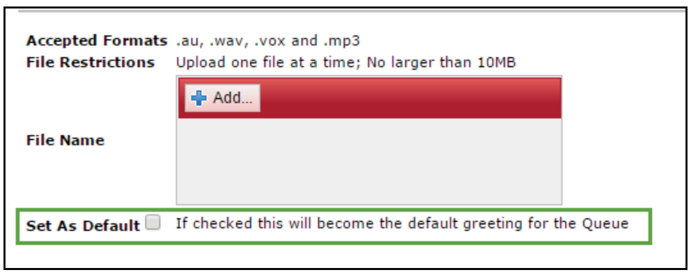
4. Click **Manage Greetings**.



5. Click **Upload Custom Greeting**.



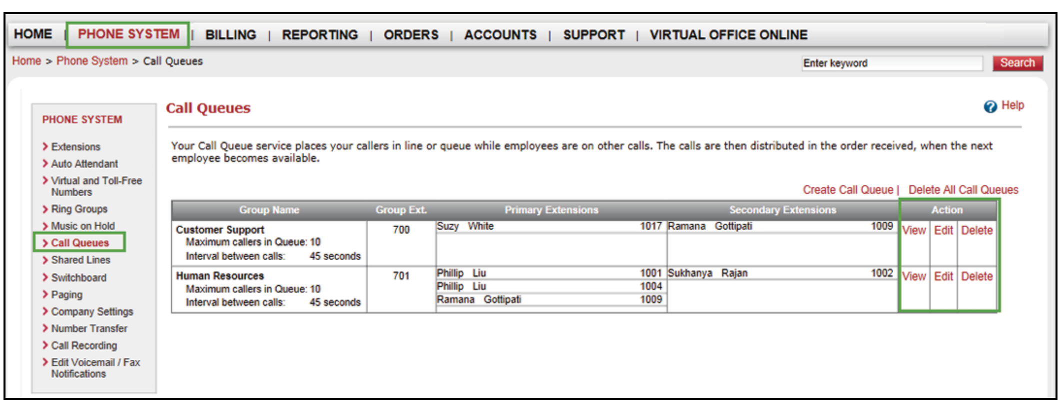
6. Click **Add**.
7. Select the audio file you want to upload.
8. Click **Upload**.
9. Select the **Set as Default** check box.



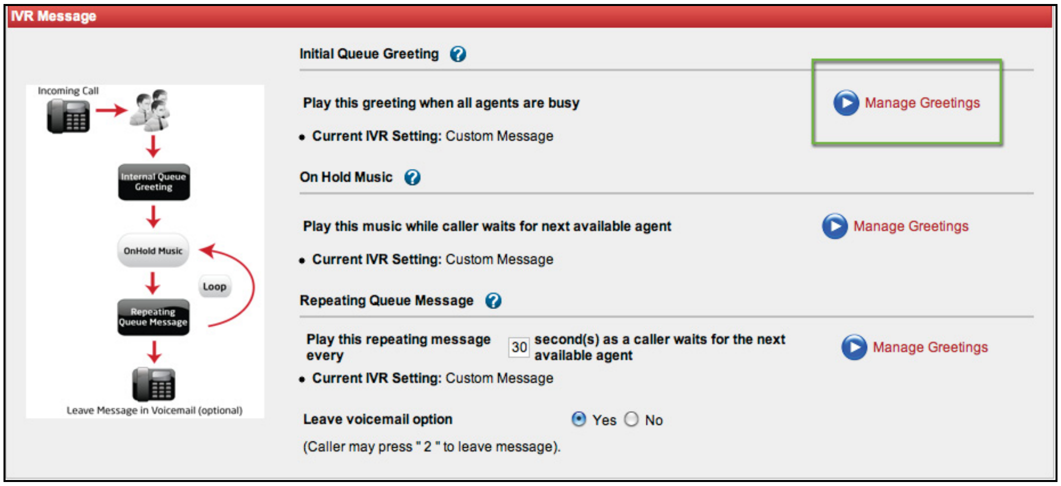
10. Review the **Electronic Signature** text, and click **I Agree**.
11. Click **OK** when the dialog box appears confirming that you have successfully uploaded the greeting.

Record an Initial Queue Greeting

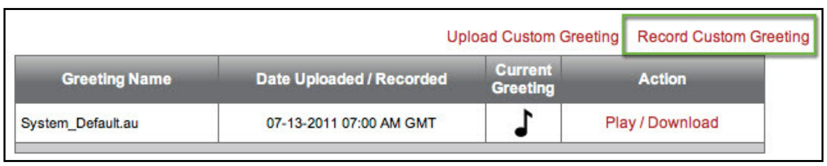
1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Call Queues**.
3. Click **Edit** in the **Action** column for the call queue you want to change.



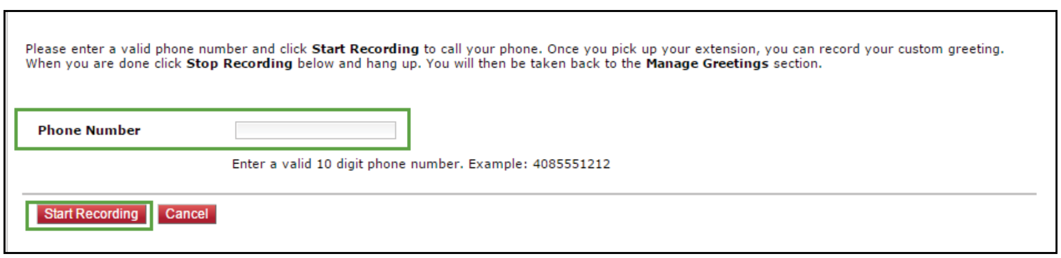
4. Click **Manage Greetings**.



5. Click **Record Custom Greeting**.



6. Enter your phone number if you want your recorded greeting to be the default initial greeting for the queue.
7. Click **Start Recording**.



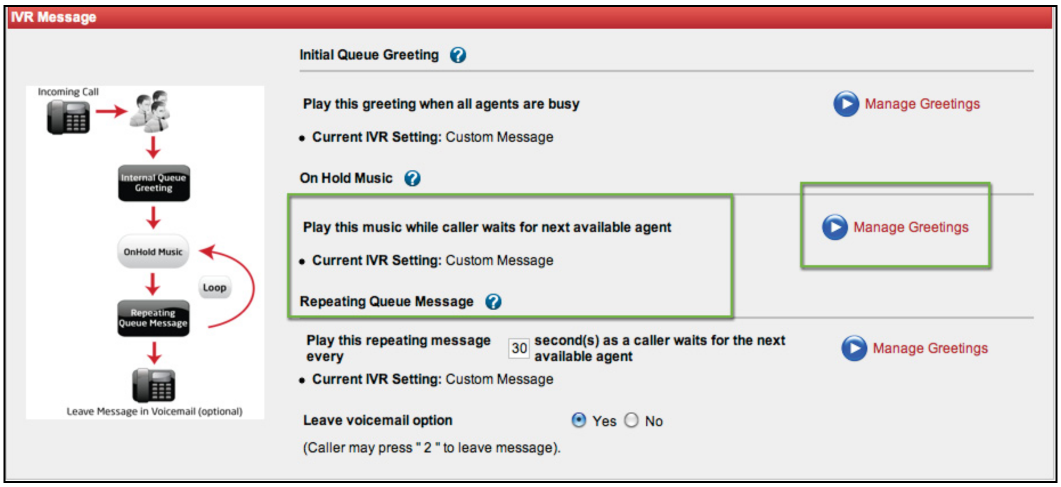
8. The system calls you at the number you entered. When the phone rings, answer it and follow the voice prompts to record your message.
9. Click **Done Recording** when you are finished.
10. Your custom greeting now appears in the **Initial Queue Greetings** list with a ♪, indicating that it is the default greeting for the call queue.

On Hold Music or Message for Use in a Queue

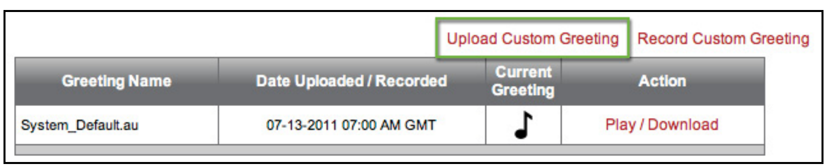
If all agents are busy, the caller continues to hear On Hold Music, which can be a music or a message. This plays immediately after the Initial Queue Greeting.

Upload On Hold Music or a Message

1. Click **Manage Greetings**.



2. Click **Upload Custom Greeting**.

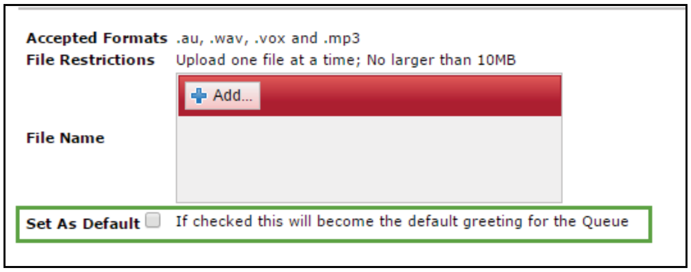


3. Click **Add**.
4. Select the audio file you want to upload.

> **Note:** An audio file can be a greeting or a piece of music.

5. Click **Upload**.

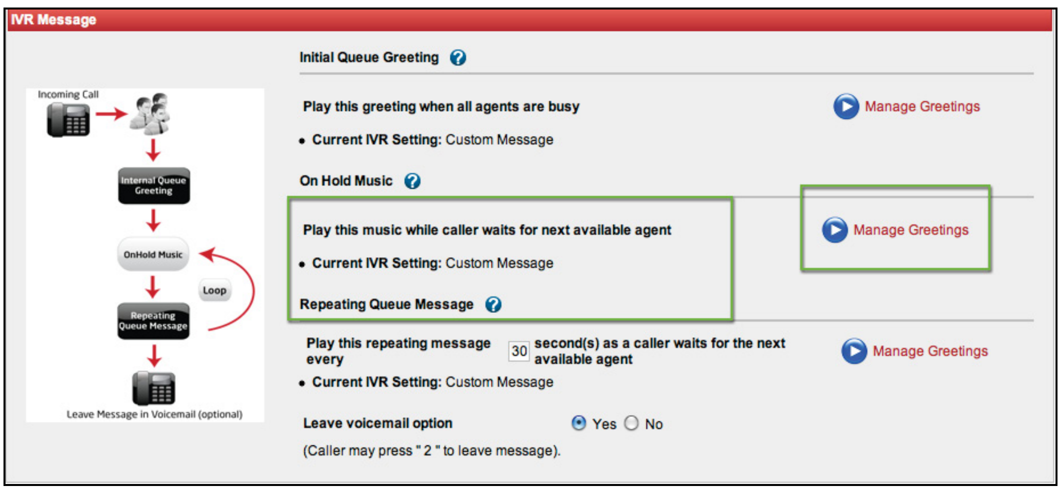
6. Select the **Set as Default** check box if you want this to be the default custom greeting.



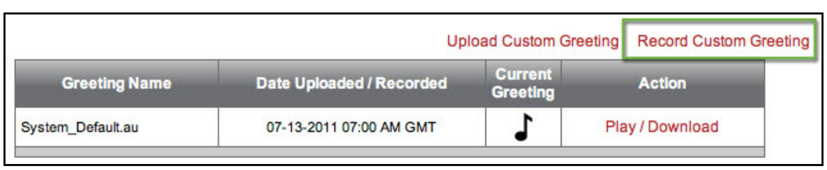
7. Review the **Electronic Signature** text, and click **I Agree**.
8. When the dialog box appears confirming that you have successfully uploaded the greeting, click **OK**.

Record On Hold Music or a Message

1. Click **Manage Greetings**.



2. Click **Record Custom Greeting**.



3. Enter your phone number if you want your recorded greeting to be the default greeting for the queue.
4. Click **Start Recording**.
5. The system will call you at the number you entered. When the phone rings, answer it and follow the voice prompts to record your message.

6. Click **Done Recording** when you are finished.

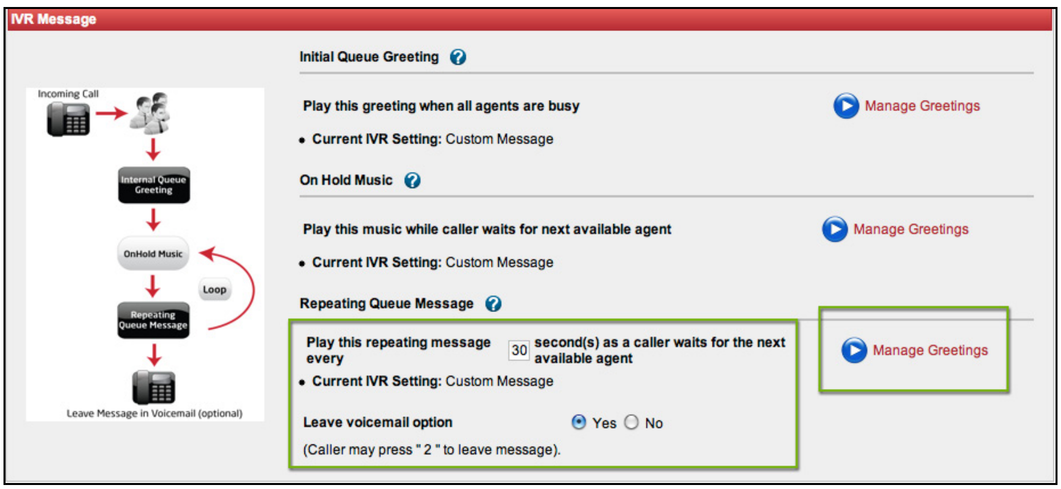
7. Your custom greeting now appears in the list of queue greetings with a , indicating that it is the default greeting for the call queue.

Repeating Queue Message

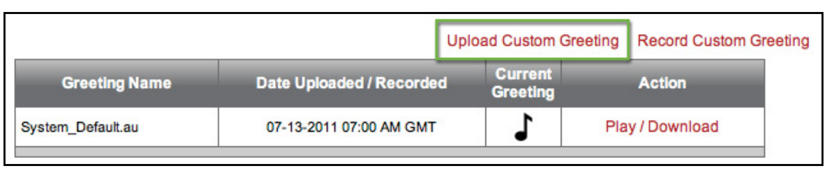
A message plays at intervals within the hold music. The default interval is 60 seconds. You can also give callers the option to leave a voicemail by pressing the **2** key.

Upload Music or a Message to Use in the Queue

1. Click **Manage Greetings**.



2. Click **Upload Custom Greeting**.

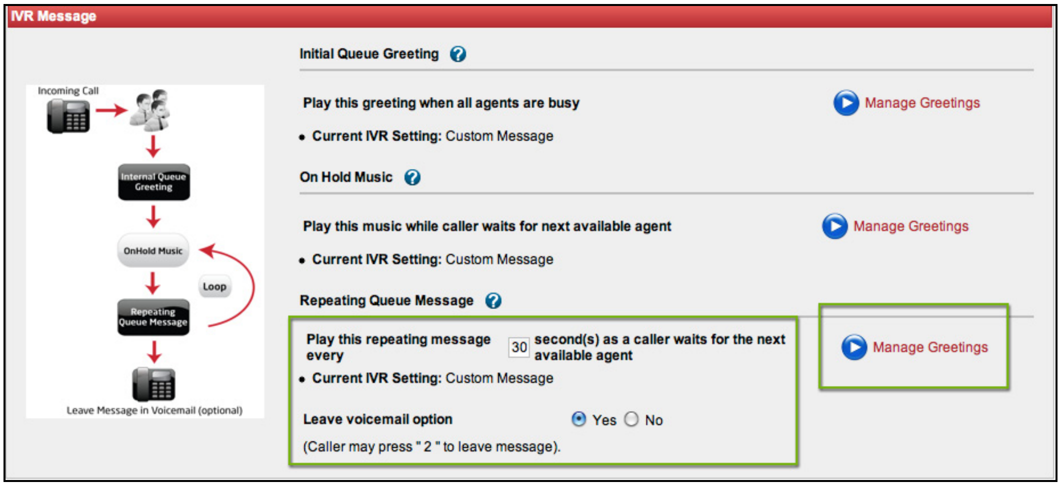


3. Click **Add**.
4. Select the audio file you want to upload.
5. Click **Upload**.
6. Select the **Set as Default** check box if you want this audio file to be the default recording for the queue.
7. Review the **Electronic Signature** text, and click **I Agree**.

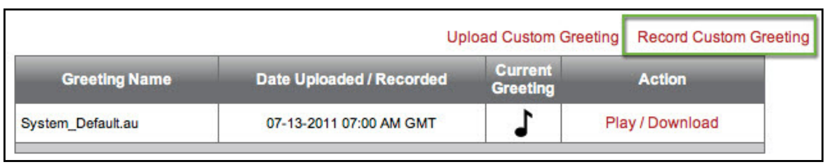
8. When the dialog box appears confirming that you have successfully uploaded the greeting, click **OK**.

Record a Repeating Queue Message

1. Click **Manage Greetings** in the **Repeating Queue Message** section.



2. Click **Record Custom Greeting**.



Upload Custom Greeting | Record Custom Greeting

Greeting Name	Date Uploaded / Recorded	Current Greeting	Action
System_Default.au	07-13-2011 07:00 AM GMT	♪	Play / Download

3. Enter your phone number if you want your recorded greeting to be the default greeting for the queue.
4. Click **Start Recording**.
5. The system calls you at the number you entered. When the phone rings, answer it and follow the voice prompts to record your message.
6. Click **Done Recording** when you are finished.
7. Your custom greeting now appears in the **Initial Queue Greetings** list with a ♪, indicating that it is the default greeting for the call queue.

Branch Office - An Overview

Branch Office gives 8x8 phone system administrators the ability to segment extensions on their PBX into groups that can represent physical or virtual branches of your company. This results in better caller experience and easier, more efficient call management. Each branch has its own unique branch directory consisting of regular extensions and service extensions, and branch-level presence management.

Branch Office also allows you to customize the “zero-out” function, giving you more options for routing calls to other extensions besides just the receptionist at the primary location. For example, you can set it up so that callers into a specific branch are sent to the branch receptionist instead of the headquarters receptionist if they dial <0#>.

The Branch Office feature is especially useful for systems with multiple auto attendants or for businesses using the 8x8 Switchboard Pro app. Using Branches, a business with geographically-distributed offices or logical groups located in the same building gains the efficiency of branch call flow.

You can grant branch-specific privileges to an administrator role. The branch administrator can:

- Oversee configuration of an assigned branch only.
- View the regular extensions and service extensions assigned to the branch.
- Assign the unassigned regular and service extensions to the branch if they have the right privileges.
- Access call recordings of extensions that are assigned to their branch(es) only.

Audience

This guide is intended for 8x8 iPBX administrators. It provides an overview of 8x8 Branch Office and its benefits. The document details the steps involved in setting up a branch office in Account Manager.

Call Flow for a Branch Office

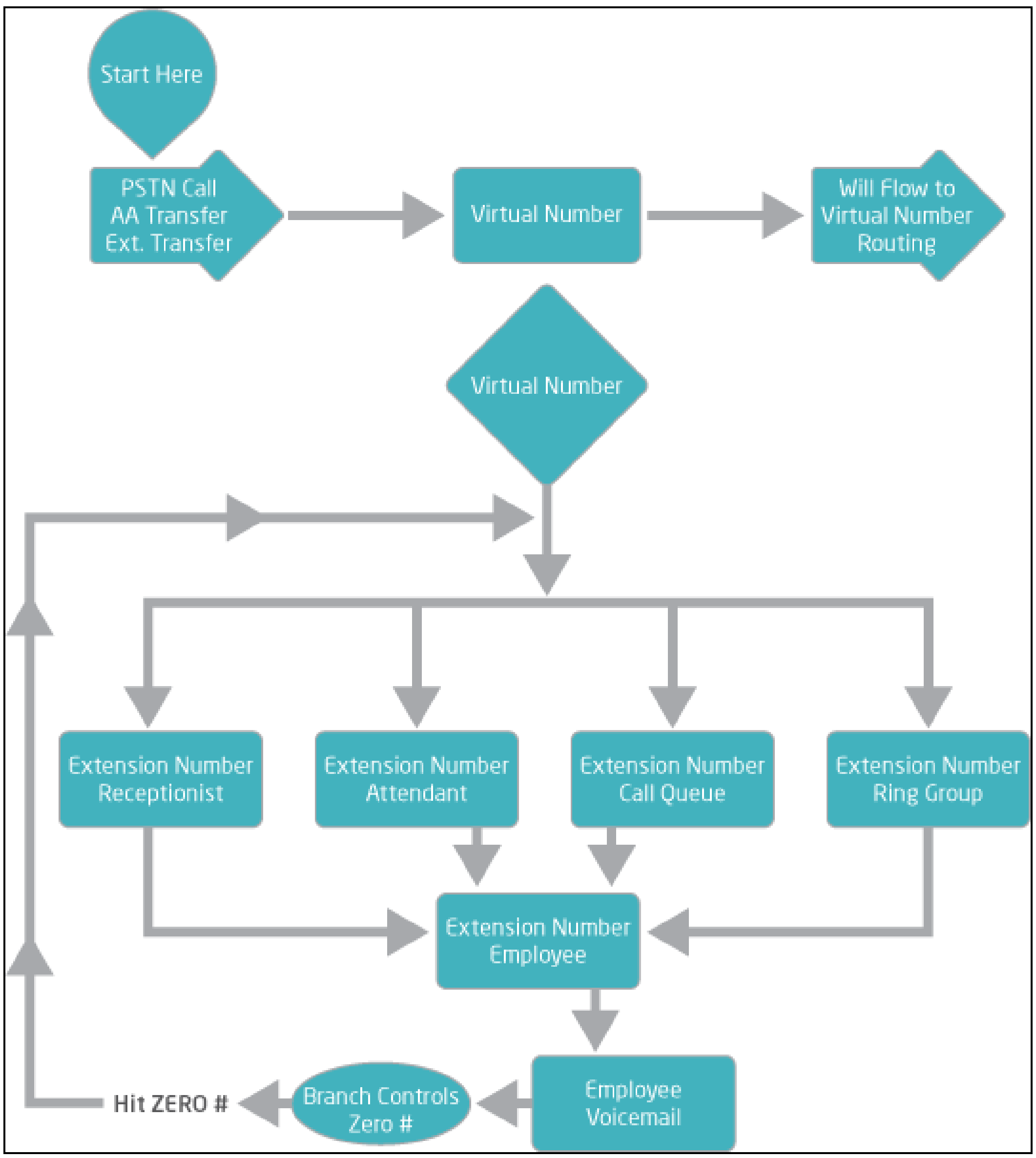
Branch call flow begins with a Virtual Number on your PBX and flows to the receptionist at the branch office. In this case, the receptionist can be a live operator, an Auto Attendant, or several live operators assembled in a ring group or call queue. In summary, a receptionist for Branch Office receives inbound calls through one of the following roles:

- Auto Attendant
- Live Attendant (receptionist)
- Multiple receptionists with a call queue
- Multiple receptionists with a ring group

Call flow within a branch office may be explained as follows:

1. The branch is assigned a Virtual Number. The Virtual Number points to the receptionist extension that is assigned as the Receptionist of the branch office.
2. Overflow calls to branch office receptionist can go to voicemail, Auto Attendant, or any forwarding phone number. The receptionist extension is where you set call overflow rules, if required.
3. The caller can leave a voicemail or dial <0#> to be directed to the Branch Receptionist in order to ensure the caller gets a desired response.

   A branch office call flow may be represented as shown here:



Receptionist Tools

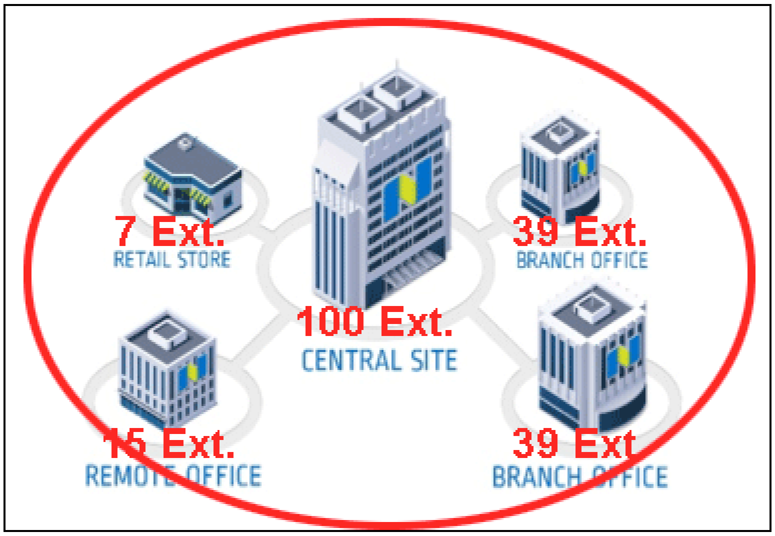
The receptionist receives branch phone calls. 8x8 provides receptionist with tools to distribute calls using:

- 8x8 Switchboard Pro, an HTML5 browser-based call management client
  - Switchboard Pro is an application specially designed for handling inbound calls, voicemail, chat and notes. Switchboard Pro enables your receptionist to view real-time presence, manage multiple calls (call park, hold, transfer), coordinate with other receptionists, and toggle Auto Attendant.
  - Switchboard Pro is currently designed to work alongside Polycom desk phones.
  - Call Parking has three modes:
    - Public Call Parking, which parks the call on an extension that is available for anyone on the PBX to pick up the call.
    - Branch Call Parking, which parks the call on an extension only available for pickup by an extension defined as part of the affected branch office.
    - Extension or Private Call Parking, which parks the call on a specific extension, only allowing retrieval from that particular extension.
      For example, the receptionist parks the call on extension 1101, which belongs to Jane Davis. As a result, the parked call can only be picked up from Jane's extension.
- BLF keys on Polycom desk phone to monitor and transfer calls
- Paging (over speakerphone or overhead PA system) to announce call parking
- Public Call Parking from desk phone

Use Case

Let's consider a business with five branch offices. Specialty Cookies has set up 5 stores in California, with a small group of employees at each store. Their main store in San Francisco is a larger operation. Specialty Cookies wants to segment its Company Directory for each branch to streamline branch-specific calls.

Let's look at the requirements for Specialty Cookies, and review how the 8x8 solution can meet the requirements.



Each store requires:

- Live Attendant to answer calls during business hours
- Auto Attendant for after hours
- Outbound Caller ID to show local area number when calling customers from the branch
- Extension dialing between stores

The main store in San Francisco requires:

- Auto Attendant for business hours
- Ring group to answer calls after hours

8x8 Solution

Virtual Office can meet Specialty Cookies' requirements using:

- 5 branch offices
- 1 Auto Attendant
- 4 Additional attendants (one each for the branch store)
- 5 Virtual Numbers
- 1 ring group

Set up Branches

Setting up branches requires you to select a branch main number from your pool of virtual numbers, define a branch receptionist, and point the virtual number to the branch receptionist.

Preparation

1. Determine a receptionist for each branch:
   - If the receptionist of a branch is a live attendant, gather the extension number.
   - If the receptionist of a branch is an auto attendant, define an auto attendant.
   - If the receptionist of a branch is a ring group or a call queue, define the desired ring group or call queue.
2. Determine a virtual number for each branch.
3. Determine the number of extensions for each branch.

Main Tasks to Set Up

- Create your call queue, ring group, or auto attendant as desired.
- Select a virtual number for each branch.
- Specify a receptionist for the branch; if a call reaches voicemail, the caller can either leave a voicemail or dial <0#> to reach the branch receptionist.
  Your receptionist can be:
  - An extension (live receptionist)
  - An auto attendant
  - A call queue (multiple live receptionists)
  - A ring group (multiple live receptionists)
- Add extensions to the branch.
- Point the branch virtual number to the branch receptionist.
- Segment the auto attendant options (dial by name, extension, or Company Directory) to streamline searching if a branch virtual number points to an auto attendant.

Configure a Branch

Configuring a branch involves the following steps:

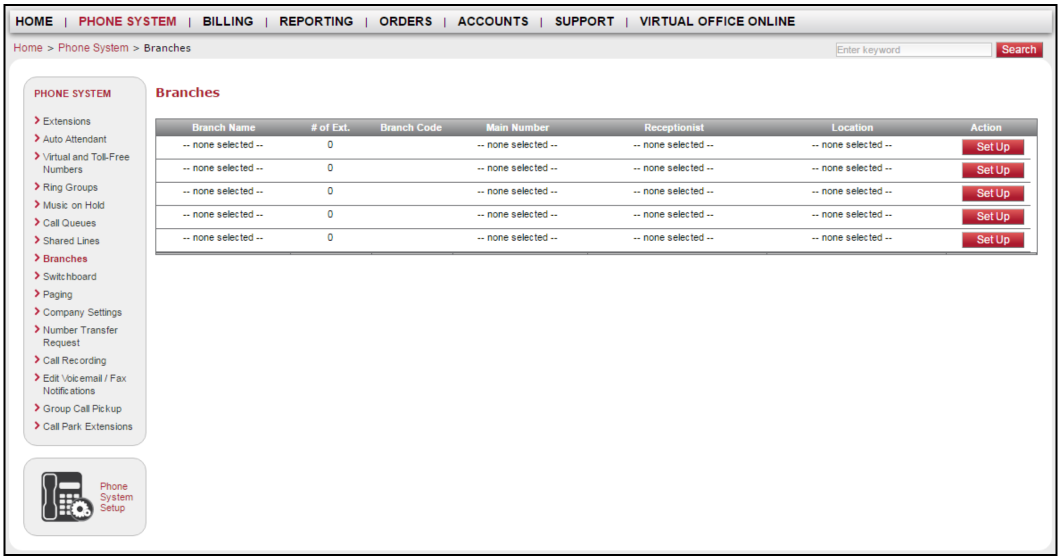
Step 1: Log in to Account Manager

1. Log in to Account Manager.
2. Click **Phone System**.

Step 2: Set up a Branch

1. Under the **Phone System** menu, click **Branches**.

   A set of branches is waiting to be configured.



2. Select a branch and click **Set up** to begin defining a branch.
3. Enter a **Branch Name**.
4. Enter a **Language**.

   This language is set as your branch default language. Telephony IVR messages, such as voicemail greetings, are played in this language. You can also set the language at the PBX level.

Note: The PBX or branch language does not affect the agent's desk phone display. You must select the language of preference for the individual extension user. For details, refer to Edit Individual Extensions.

Summary of Localization Settings

The following table summarizes the localization settings in Account Manager:

Setting	Description	Configured At
Edit My Profile	The primary or secondary administrators who have access to Account Manager can configure the **Language** setting in **Edit My Profile** to	User level

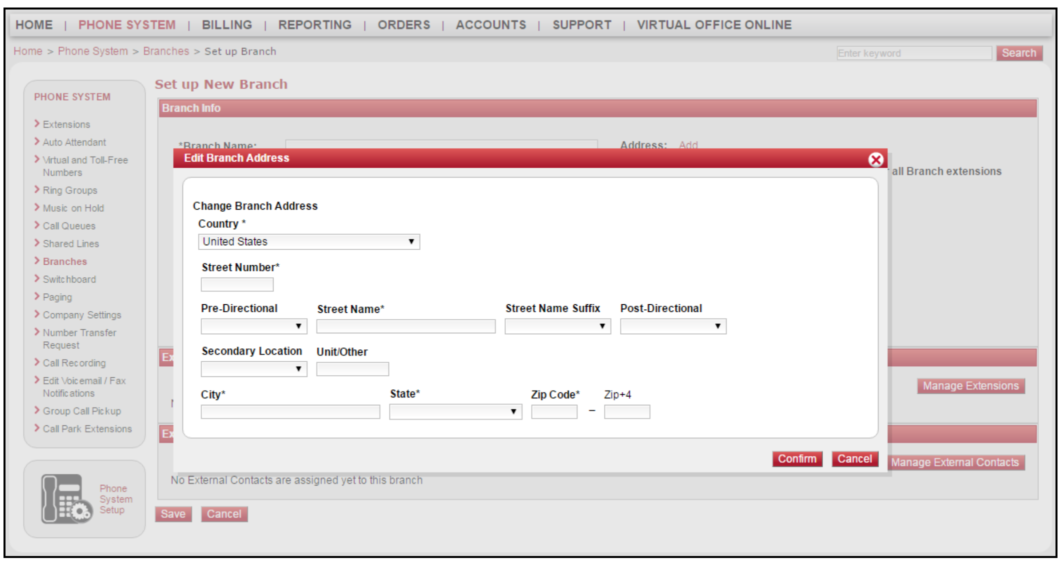
Setting	Description	Configured At
	communicate emails in their language of choice. This setting overrides the default PBX or branch language setting. It only applies to the administrator's email communications.	
Account > User Profiles	Configure the **Language** setting for extension users to communicate emails in their language of choice. This setting in user profile overrides the default PBX or branch language. It only applies to the user's email communications.	User level
Phone System > Company Settings	Configure the **Language** setting for all users in the PBX to receive Telephony IVR messages, such as voicemail greetings in the selected language. This setting is overridden by language settings at the branch and/or individual extension level. In the absence of the individual extension user's language of choice, the language setting of branch overrides the PBX language setting.	PBX level
Phone System > Branches (Add-on subscription-based)	Configure the **Language** setting for users to receive Telephony IVR messages, such as voicemail greetings in the selected language. In the absence of the individual extension user's language of choice, the branch language setting overrides the PBX company language setting. In other words, if an extension belongs to a branch set to Japanese, and if you have not defined another language at the extension level, Telephony IVR messages are played in the Japanese language. If the extension belongs to a branch with no other language defined, you inherit the PBX language.	Branch level
Phone System > Edit Individual Extension	Configure the **Language** setting for extension users to receive Telephony IVR messages, such as voicemail greetings in the selected language. The display on the user's desk phone also appears in this language. This setting overrides the PBX and branch language setting. **Note:** If you need help with setting the user language in bulk, contact 8x8 Support for help.	Extension level

Setting	Description	Configured At
	Note: To access localized versions of 8x8 Virtual Office applications, refer to your computer or device manual to learn how you can change the display language of your operating system.	

5. Select **Main Number** for the branch by choosing a virtual number.

Note: The destination for the virtual number is your receptionist.

6. Enter the branch address.



The address is validated.

Note: The **Address** field is for reference purposes, and does not have any impact on the functionality.

7. Select a **Receptionist Type**.

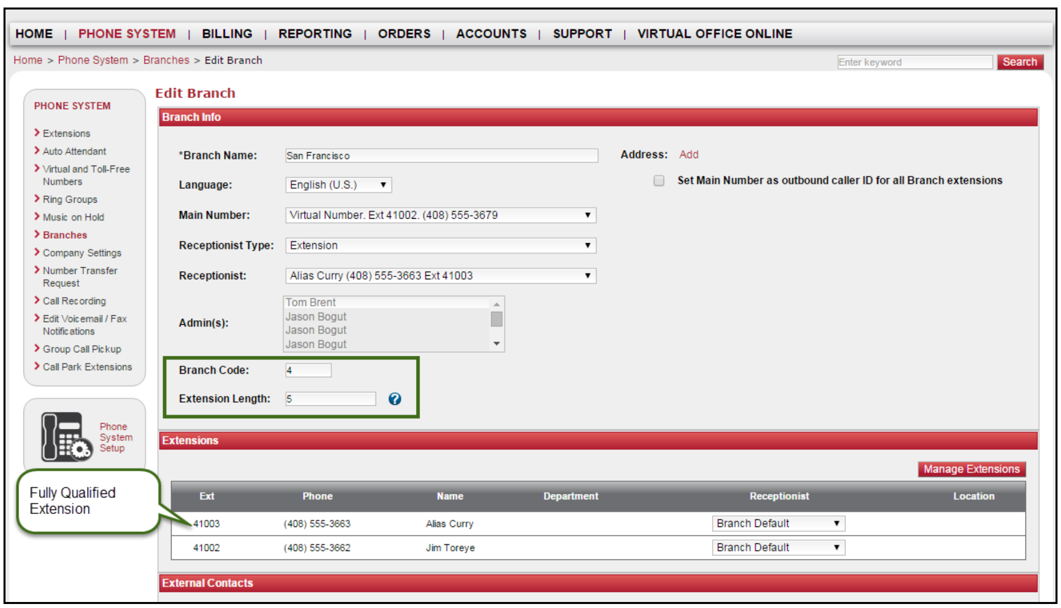
   Receptionist type points to the branch receptionist, which defines the destination for calls landing in an extension voicemail. On reaching an extension voicemail, callers can leave a voicemail or dial <0#> to be directed to the branch receptionist from the following choices:

- Extension (local receptionist)
- Ring Group (multiple receptionists)
- Auto Attendant
- Call Queue

8. Select a **Receptionist** based on the type.
   If the receptionist type is **Extension**, select an extension from the available list.

> **Note:** The branch administrator appears under the view-only **Admin** list. You can determine the secondary administrator for a particular PBX under **Accounts > Privileges > PBX**.

9. Enter a **Branch Code**. A branch code must be unique within the same PBX, but can be used in a different PBX.



10. Enter an **Extension Length**. This is the combined length of the branch code and short code. This is specific to the branch only.
    The short code will now transform to a fully-qualified extension, which includes the branch code and the short code. For example, if you assigned branch code 4 to the San Francisco branch office, branch users with short codes (such as 1001) will be assigned with a fully-qualified extension number (such as 41001).

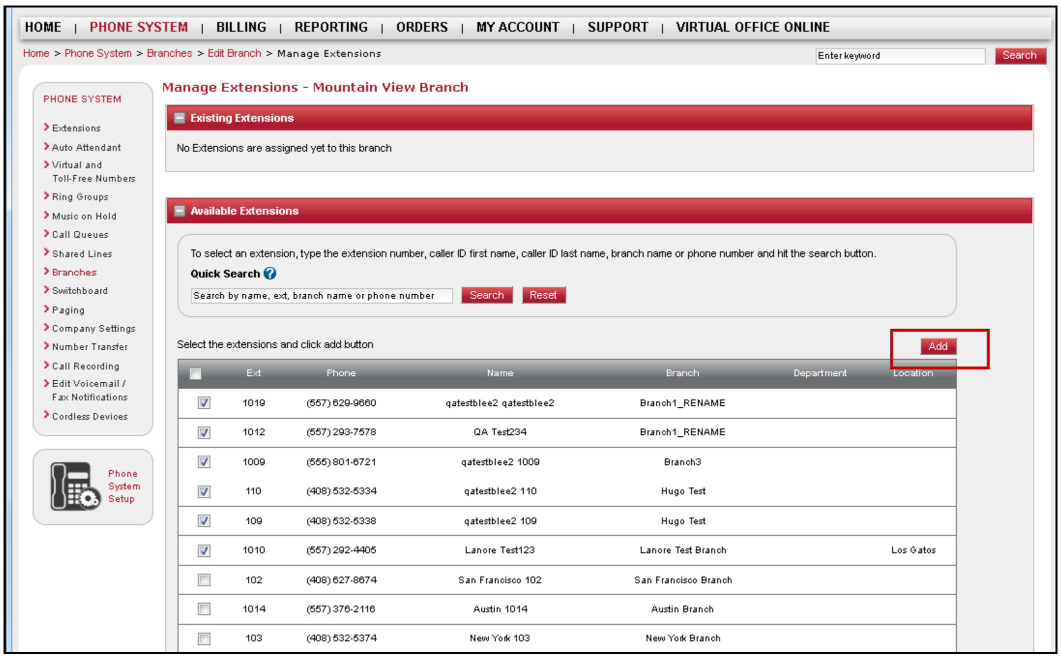
Note: Branch Code and **Extension Length** are only applicable to enterprise customers with multiple PBXs and branches.

Step 3: Assign Extensions to the Branch

You can assign regular extensions as well as service extensions to a branch. Assigning a service extension is managed in the respective configuration page for ring groups, call queues, and auto attendants. For details, refer to Assigning Service Extensions to a Branch.

To assign regular extensions:

1. Click **Manage Extensions**.



A list of all extensions within the iPBX is displayed.

2. Select the desired extensions, and click **Add**.

   The extensions are now mapped to the branch.

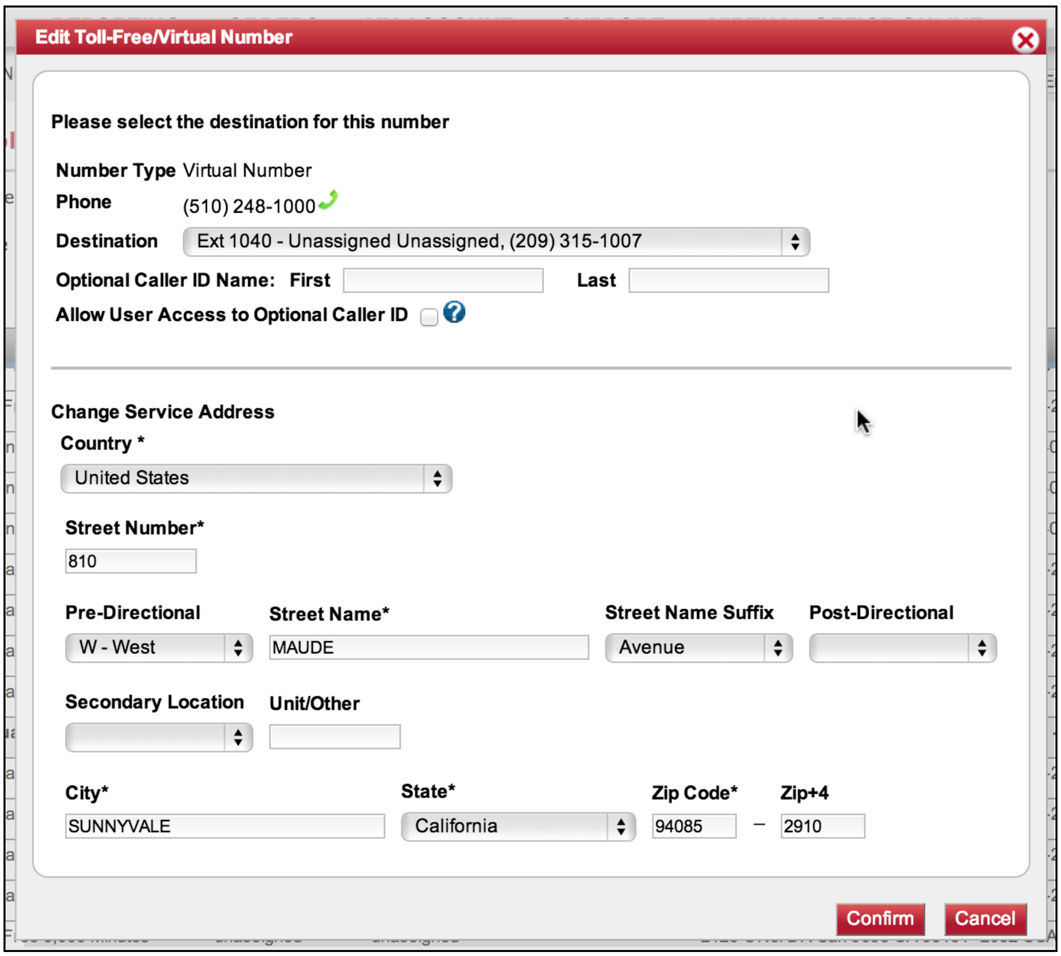
3. Click **Save**.

   Repeat the setup process to define all other branches in your iPBX.

   The next step is to assign a destination for the branch virtual number. If you already assigned the destination, make sure it matches the receptionist type defined for the branch.

Step 4: Select a Destination for Branch Main Number (Virtual Number)

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, select **Virtual and Toll Free Numbers**.
3. Select the virtual number assigned to a branch, and click **Edit**.
4. Select the destination to match the receptionist type defined for the branch in Step 3: Assign Extensions to the Branch.
5. Optionally, change **Service Address** to match the branch address.
6. Click **Confirm** to save.

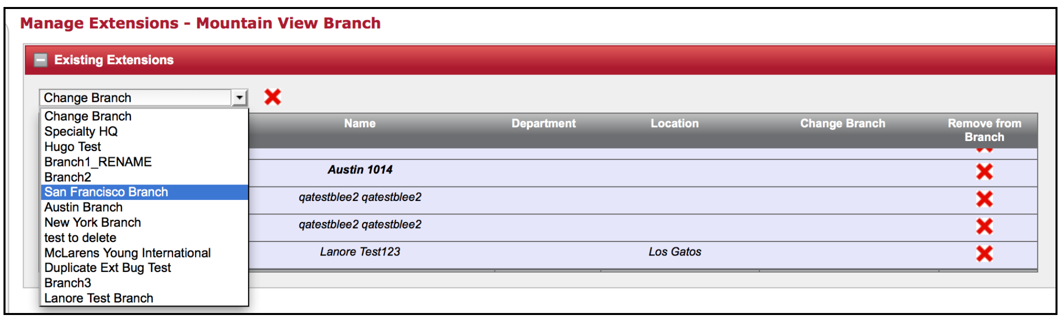


Note: The destination for the branch virtual number must match the receptionist type defined for the branch.

Manage Extensions in a Branch

You can add or remove regular extensions to a branch and change branch assignment any time. Click **Manage Extensions** within the branch settings.

- **Add**: From the available extensions, select extensions and click **Add**.
- **Change Branch**: Select a branch extension. In the **Change Branch** drop-down, select a desired branch from the available branches.



- **Remove Branch**: Click ❌ to remove a branch.

Note: Adding or removing service extensions should be managed via the respective service extension configuration page.

Assign Service Extensions to a Branch

The 8x8 PBX administrator can now assign the following types of service extensions to a branch:

- Ring Group
- Call Queue
- Auto Attendant

Note: A branch administrator with privileges to service extension features can assign service extensions to the branch they manage.

Assigning these service extensions allows a branch receptionist to access these extensions from the contact directory and route calls easily.

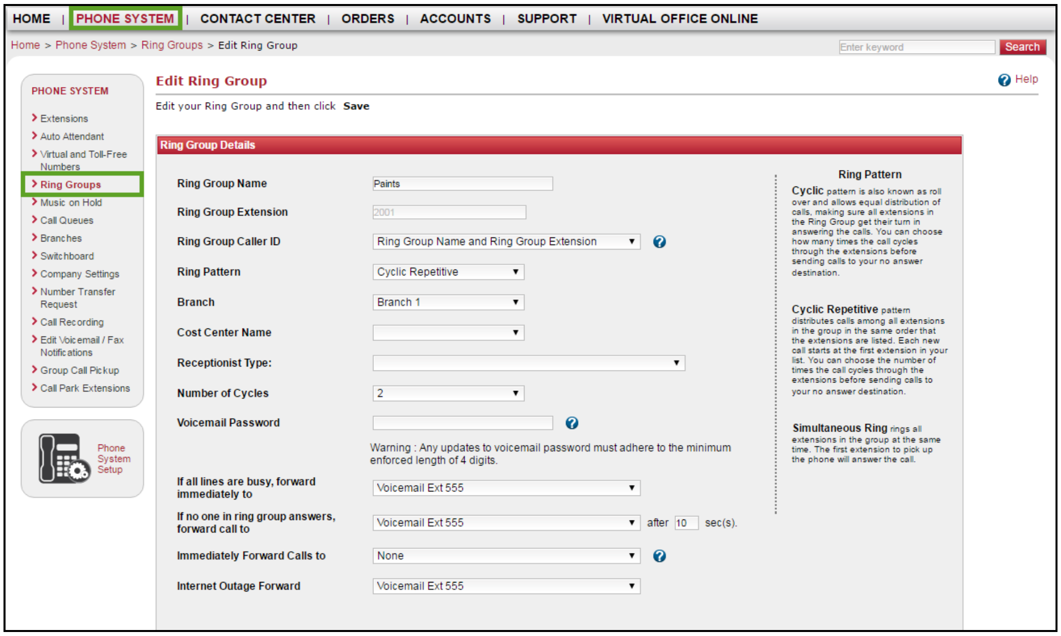
To assign these service extensions to a branch, you must go to the feature configuration page. For example, to assign a ring group you must create a new ring group or edit an existing ring group, and select the branch and receptionist type.

Note: Assigning service extensions to branches must be handled via the configuration pages for service extensions. In the branch configuration page, you can view the list of assigned service extensions. This information is read-only.

To assign a ring group extension to a branch:

1. Log in to Account Manager.
2. Go to **Phone Systems > Ring Groups**.
3. From the list, select a ring group to edit.
4. Select the desired branch from the drop-down menu.

5. Select the **Receptionist Type** from the available choices.

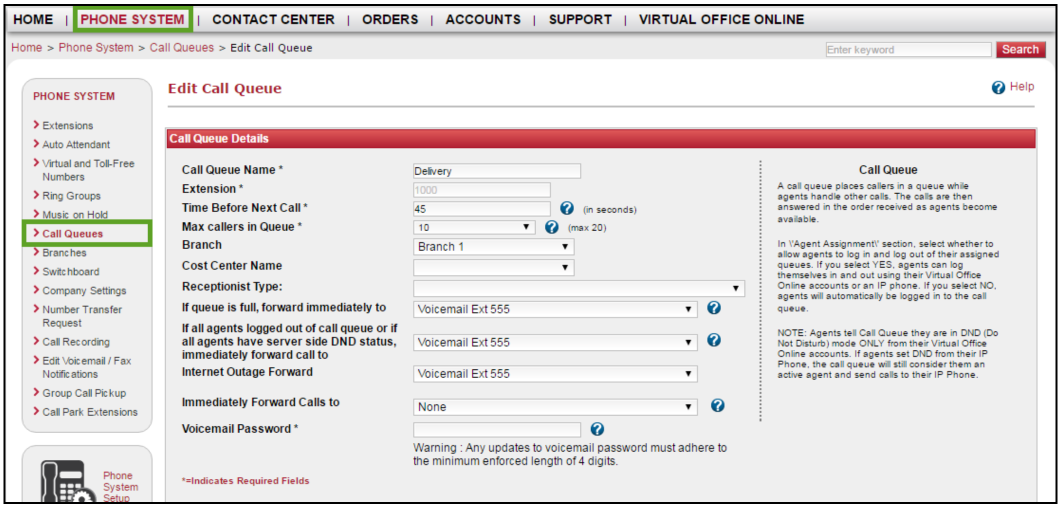


6. Based on the receptionist type chosen, select the **Receptionist**.
7. Click **Save**.

To assign a call queue extension to a branch:

1. Log in to Account Manager.
2. Go to **Phone Systems > Call Queues**.
3. From the list, select a call queue to edit.
4. Select the desired branch from the drop-down menu.

5. Select the **Receptionist Type** from the available choices.



6. Based on the receptionist type chosen, select the **Receptionist**.
7. Click **Save**.

To assign an auto attendant extension to a branch:

1. Log in to Account Manager.
2. Go to **Phone Systems > Auto Attendant**.
3. From the list, select an auto attendant profile to edit.
4. Select the desired branch from the drop-down menu.
5. Click **Save**.

To view the service extensions available to a branch:

After assigning the desired service extensions to the branch, you can view the read-only list.

1. Go to **Phone System > Branches**.
2. Select the branch to edit.
3. Note the service extensions assigned to the branch are listed under **Extensions**.

Change Branch Receptionist at Extension Level

When a call reaches an extension voicemail, callers can choose to leave a voicemail or dial <0#> to be directed to the branch receptionist. By assigning a receptionist at the extension level, you can make sure calls requiring immediate attention get a live response rather than landing in the voicemail box. For example, if a customer tries to reach Tier 1

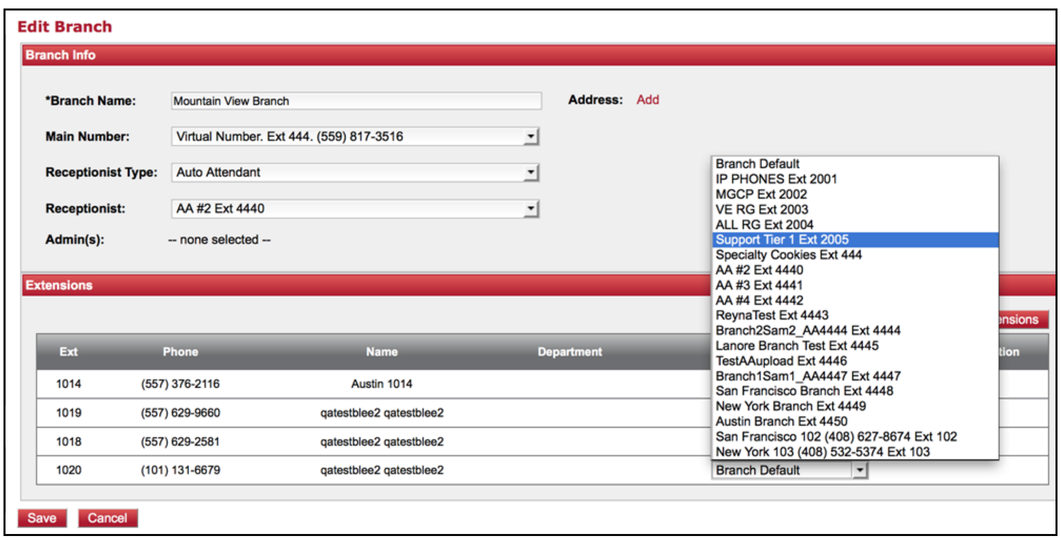
Support after hours, the branch receptionist for Tier 1 Support may point to the ring group of Tier 2 Support with extended hours.

During branch definition, the Receptionist Type determines how to route the calls reaching voicemail. If you need a different routing for a specific extension, you can specify the desired destination at the extension level to another extension, a ring group, call queue, auto attendant, or a different branch.

Note: The receptionist type for service extensions should be configured in the service extension configuration page.

To change the branch receptionist for an extension:

1. Within the branch setup, click **Manage Extensions**.
2. Click to choose a different receptionist from the drop-down list, instead of the branch default.



3. Click **Save**.

Auto Attendant Segmented by Branch

Auto Attendant can be customized to your branch, which saves callers time while they search contacts by name, extension, or Company Directory. You can customize the following call routing options in an auto attendant to point to a specific branch or to the whole PBX.

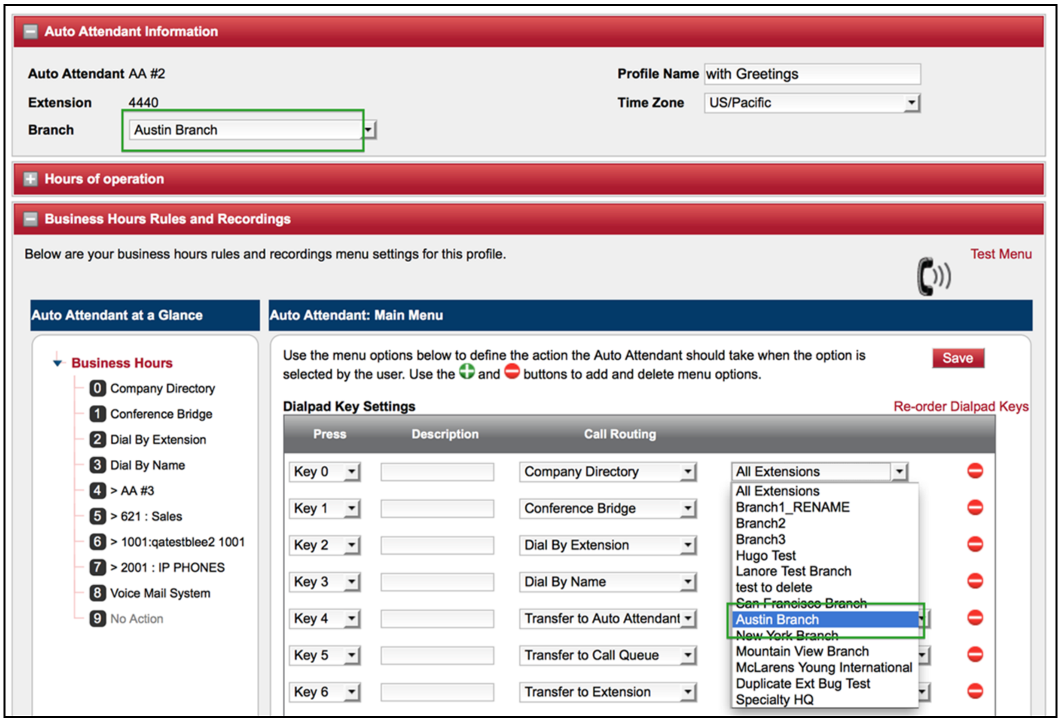
> **Note:** If a Cost Center is bound to a Branch, selecting the Branch results in a read-only Cost Center field. However, if there is no Cost Center bound to the selected branch, the Cost Center must be selected manually.

- Dial by Name
  - Segmented by Branch
  - Use Case: When you select a branch, the caller who opts to dial by name goes through the names for the specified branch instead of the whole PBX.
- Dial by Extension
  - Segmented by Branch
- Play Company Directory
  - Segmented by Branch

To customize Auto Attendant for a branch:

1. Go to a branch auto attendant in Account Manager under **Phone System > Auto Attendant**.
2. Click **Edit** next to the desired auto attendant profile.

3. In the **Auto Attendant Information** pane, select a branch from the drop-down choices.



4. Expand the **Business Hours Rules and Recordings** pane.
5. In the **Auto Attendant** page, select a branch for:
   a. Company Directory
   b. Dial by Name
   c. Dial by Extension

Callers going through these Auto Attendant options now search through extensions assigned only to the branch.

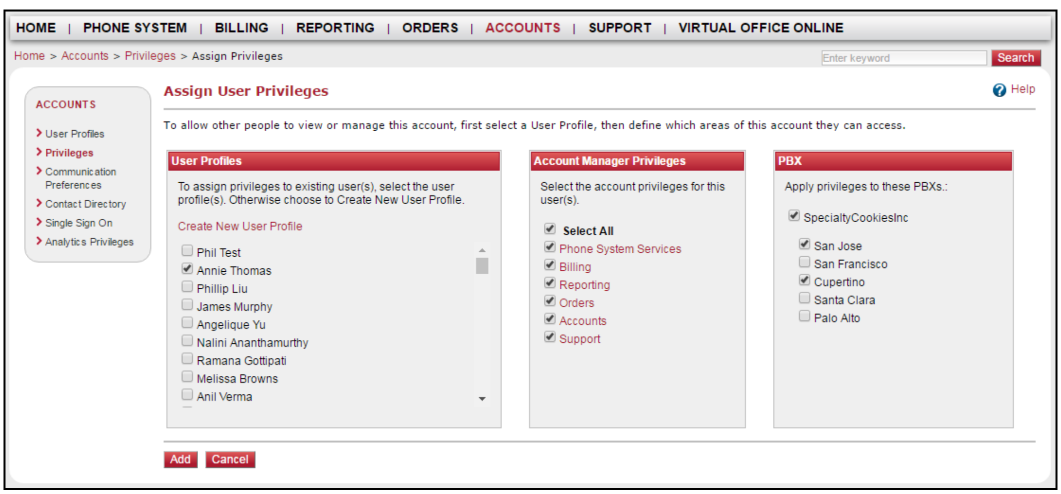
Note: All the options mentioned above within an auto attendant must point to the same branch.

Define a Branch Administrator

You can grant branch-specific privileges to an administrator role. The branch administrator can oversee configuration of an assigned branch only. A branch administrator can view the regular extensions and service extensions assigned to the branch. Additionally, they can assign the unassigned regular and service extensions if they have the right privileges. They can access call recordings of extensions that are assigned to their branches only.

To assign branch-specific privileges:

1. Click **Accounts** in the top navigation bar.
2. Under the **Accounts** menu, click **Privileges**.
3. Click **Assign New Privileges** to manage user profile privileges.
4. Select an administrator from the existing user profiles.
5. Select desired privileges for the administrator.
6. Select the branch office under **PBX**.
7. Click **Add**.



You can assign multiple branch offices to an administrator.

View Branch Specific Extensions

When a branch administrator logs in to Account Manager, they can view regular and service extensions assigned to the branch. If they have privileges to the service extension features, they can create and assign service extensions to the branch they manage. For example, if the branch administrator has privileges to manage ring groups, they can create a new ring group and assign it to the branch.

In the branch page view, the branch administrator can view:

- Regular extensions assigned to the branch
- Regular extensions available for assignment to the branch
- Service extensions assigned to the branch

In the service extensions (ring groups and call queues) page view, the branch administrator can view:

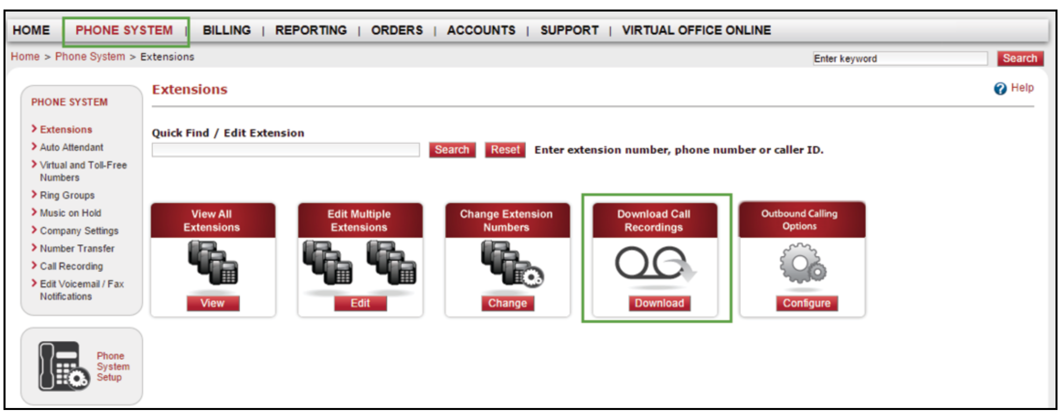
- Service extensions assigned to the branch
- Service extensions available for assignment to the branch (applicable if you have the privileges for service extension features)

Access Call Recordings

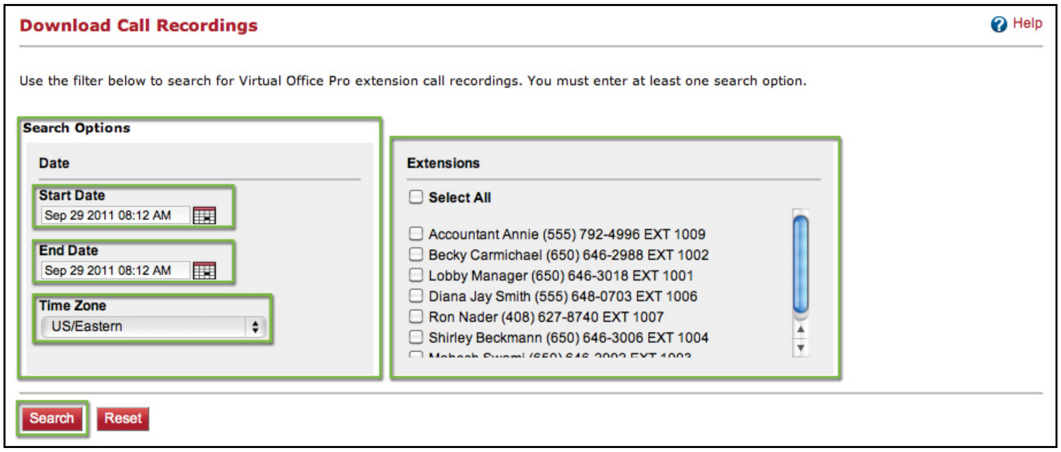
Branch administrators are allowed to access call recordings of extensions assigned to their branch(es) only.

To download call recordings:

1. Click **Phone System** in the top navigation bar.
2. Click **Download Call Recording**.



3. Select your filtering options. Enter the desired date range, time zone, and select the desired extensions. If you are a branch administrator, you will see the extensions assigned to the branch only.

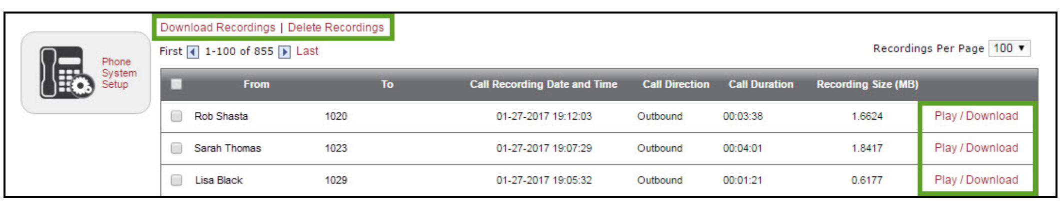


Note: You must select at least one extension.

4. Click **Search**.

   The search results are displayed.

5. Select the check box next to the recording(s) you want to access.
6. When you access the recordings:
   - To listen to a single recording at your desktop, click **Play** next to the desired recording.
   - To download a single recording to your computer, click **Download** next to the desired recording.
   - To download the selected recording(s) to your computer, click **Download Recordings**.
   - To delete the selected recording(s), click **Delete Recordings**.



Barge-Monitor-Whisper

8x8 Barge-Monitor-Whisper is an add-on service that helps office managers and supervisors to monitor phone conversations of employees on 8x8 PBXs with customers or others. Whether it is to ensure quality of customer service, coach new agents during a conversation, or interrupt a live call for an emergency, 8x8 Barge-Monitor-Whisper gives you flexibility. For more information, refer to the Barge-Monitor-Whisper User Guide.

This option is available to you only if you have subscribed to the 8x8 Barge-Monitor-Whisper service. Barge permissions are provisioned to extensions at the time of ordering the barge service with 8x8. In Account Manager, these extensions show configurable barge permissions.

Note: Barge permissions are granted to primary extension users only, which excludes extensions associated with call queues, ring groups, virtual extensions, or auto attendants.

Once provisioned, extension users have the following permissions:

- Ability to monitor all extensions within the PBX.
- Ability to secretly monitor and barge in on all extensions.
- Ability to monitor without entering voicemail password.

As a phone system administrator, you can restrict or change the permissions as follows:

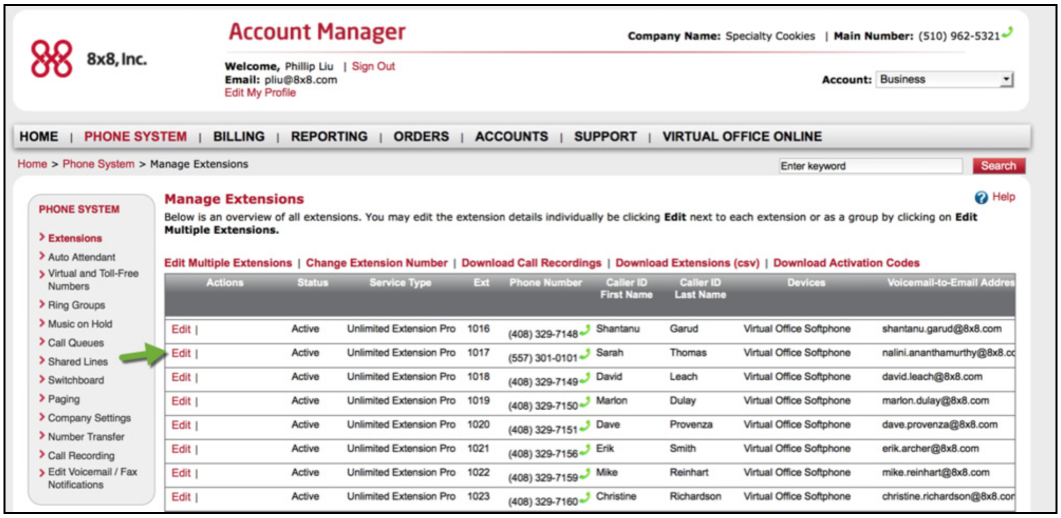
- Restrict or disable barge permissions for an extension through barge lists. A barge list specifies the extensions of agents whose conversations you can barge in on.
- Enable barge tone that alerts the agent about the barge action.
- Prevent misuse of barge by prompting for an access code.

Configure Barge Permissions for an Extension User

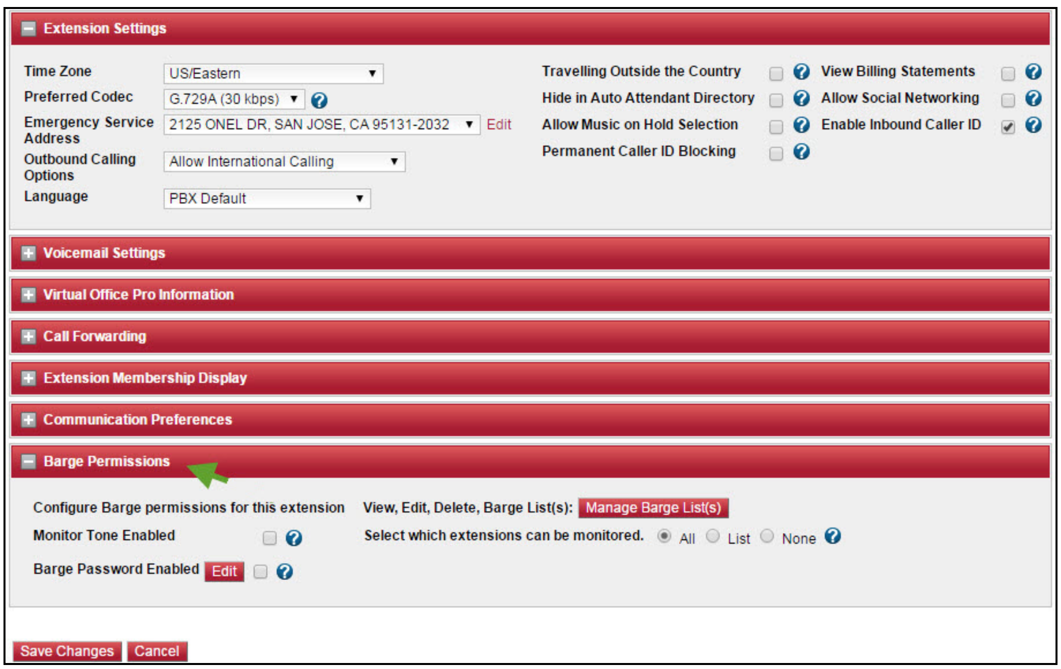
As a phone system administrator, you can select an existing barge list to monitor or create a barge list, enable barge monitoring tone, enable barge voicemail password, and select the extensions to be monitored.

1. Click **Phone System** in the top navigation bar.
2. On **View All Extensions**, click **View**.
3. Select the extension you need to change barge permissions for.

4. Click **Edit** to view the extension settings.



5. Click to expand the **Barge Permissions** pane.



6. Select or change the desired barge settings.

Barge Permissions	Description
Monitor Tone Enabled	If enabled, relays a beep tone to the agent, signaling a barge session.
Barge Password Enabled	If enabled, prompts the supervisor to enter the voicemail password before beginning to monitor.
View, Edit, Delete, Barge List(s)	Lets you create, manage, and delete barge lists.
Select which extensions can be monitored	■ **All** allows barging in on all extensions. ■ **List** allows barging in on extensions in a specific barge list. ■ **None** disables barging.

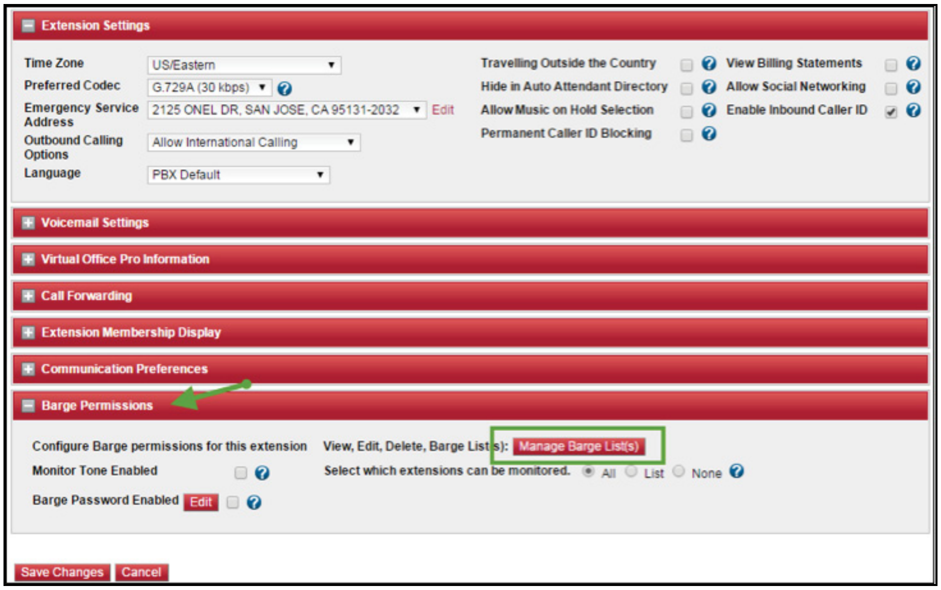
7. Click **Save Changes**.

Create a Barge List

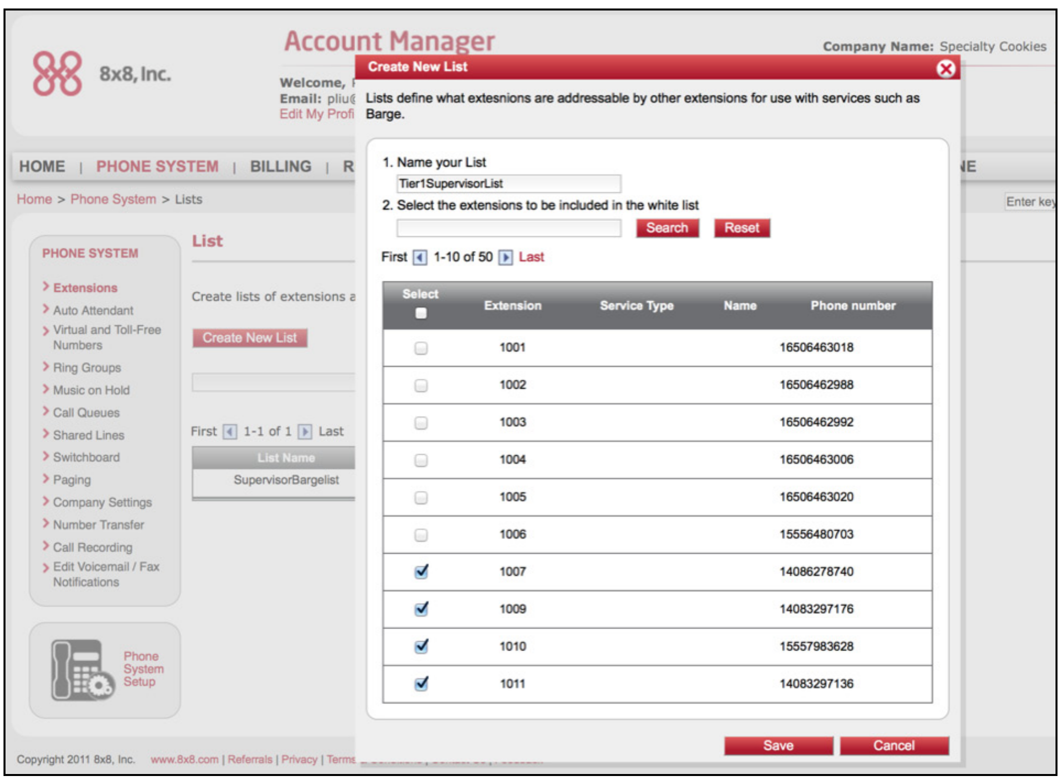
A barge list includes extensions which you can barge in on. You can create a barge list and assign it to an extension with barge permissions. It allows the extension user to barge in on extensions in the barge list.

1. Click **Phone System** in the top navigation menu.
2. On **View All Extensions**, click **View**.
3. Click **Edit** by the extension you wish to manage.
4. Click to expand the **Barge Permissions** pane.

5. Click **Manage Barge Lists**.



6. Click **Create New List**. Name your list, and add extensions to barge in on.



7. Click **Save**.

Set up Power Keys

8x8 Power Keys (formerly known as Virtual Receptionist) is an add-on service that provides powerful call handling and work group monitoring abilities using any Polycom phone with four or more line keys, using your new VVX phones, or using your new VVX phones with SideCars attached. Using the Power Keys service, a manager or a power user can handle multiple calls simultaneously and monitor the availability of other extension users on the same PBX.

For more details, refer to the Power Keys User Guide.

Configure Line Keys

As a Virtual Office PBX administrator, you can set up the initial configuration of line keys in Account Manager, and push these settings to the Power Keys enabled extension phone from Account Manager.

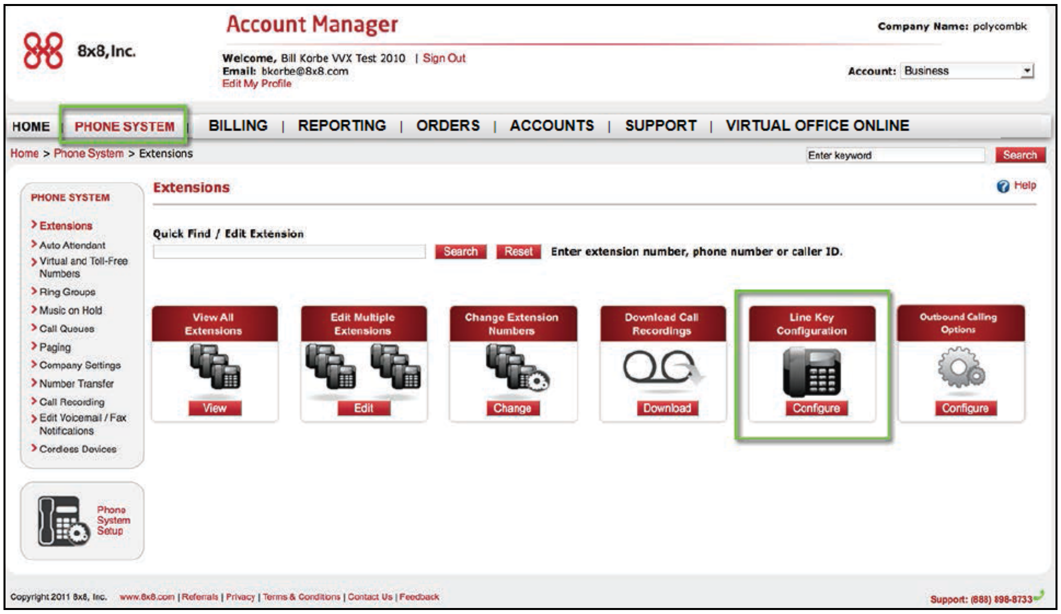
You can assign:

- **Line Appearance Key (LAK)**: to receive and handle multiple live calls.
- **Busy Lamp Field Key (BLF)**: to track the status of other extension users on the same PBX.
- **Speed Dial Key**: to quickly dial out to most frequently used number.

Configure Line Keys for a Power Keys-Enabled Extension

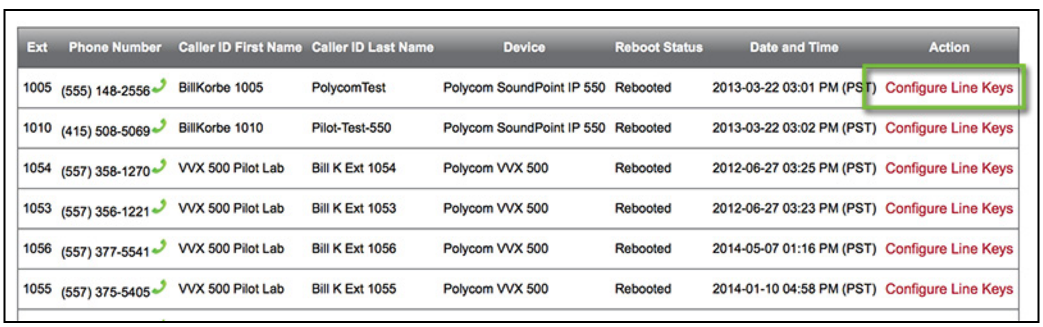
1. Click **Phone System** in the top navigation bar.

2. On **Line Key Configuration**, click **Configure**.



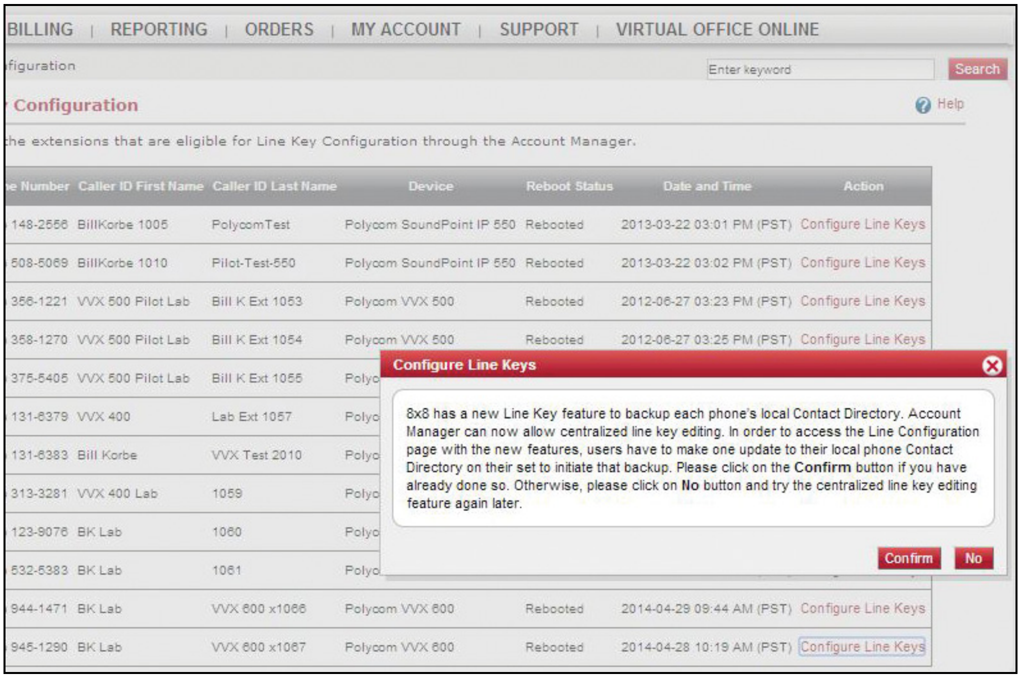
A list of extensions eligible for line key configuration displays.

3. From the list, select an extension and click **Configure Line Keys**.

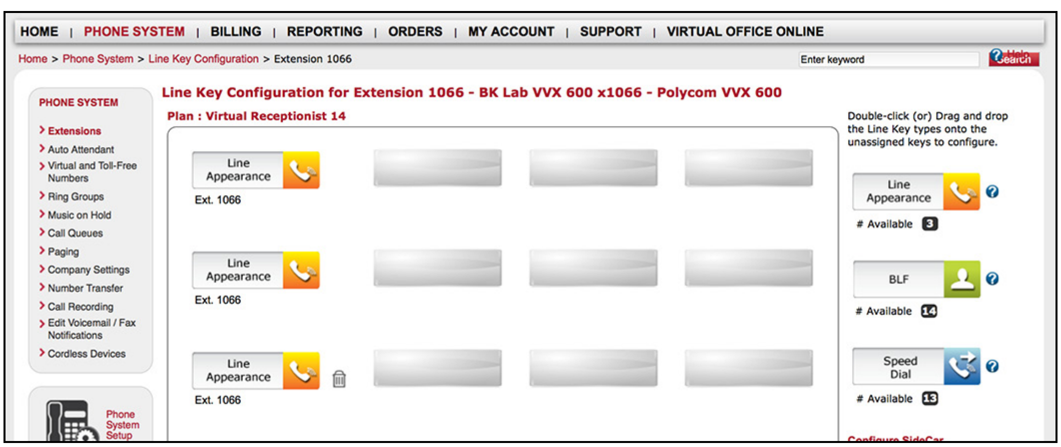


Ext	Phone Number	Caller ID First Name	Caller ID Last Name	Device	Reboot Status	Date and Time	Action
1005	(555) 148-2556	BillKorbe 1005	PolycomTest	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:01 PM (PST)	Configure Line Keys
1010	(415) 508-5069	BillKorbe 1010	Pilot-Test-550	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:02 PM (PST)	Configure Line Keys
1054	(557) 358-1270	VVX 500 Pilot Lab	Bill K Ext 1054	Polycom VVX 500	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
1053	(557) 356-1221	VVX 500 Pilot Lab	Bill K Ext 1053	Polycom VVX 500	Rebooted	2012-06-27 03:23 PM (PST)	Configure Line Keys
1056	(557) 377-5541	VVX 500 Pilot Lab	Bill K Ext 1056	Polycom VVX 500	Rebooted	2014-05-07 01:16 PM (PST)	Configure Line Keys
1055	(557) 375-5405	VVX 500 Pilot Lab	Bill K Ext 1055	Polycom VVX 500	Rebooted	2014-01-10 04:58 PM (PST)	Configure Line Keys

You are prompted to back up the Contact Directory or speed dials on the phone.



4. Perform the back-up process on your device. For details, refer to Appendix B.
5. After completing the back-up on the phone, click **Confirm** to continue in Account Manager.
6. The **Line Key Configuration** page shows the device key map with assigned keys and unused spare keys on your phone.

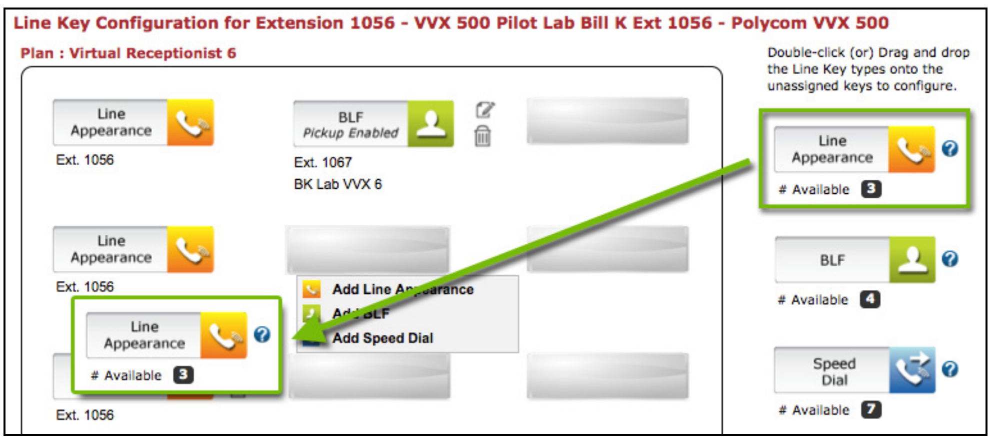


This key map corresponds to the keys on your phone.

7. On the right side of the page, you have the following assignment key types:
   - **Line Appearance Key (LAK)**: to receive and handle multiple live calls.
   - **Busy Lamp Field Key (BLF)**: to track the status of other extension users on the same PBX.
   - **Speed Dial Key**: to quickly dial out to most frequently used number.

> **Note:** The number of LAK and BLF keys allowed for the extension depends on the Power Keys plan it is associated with.

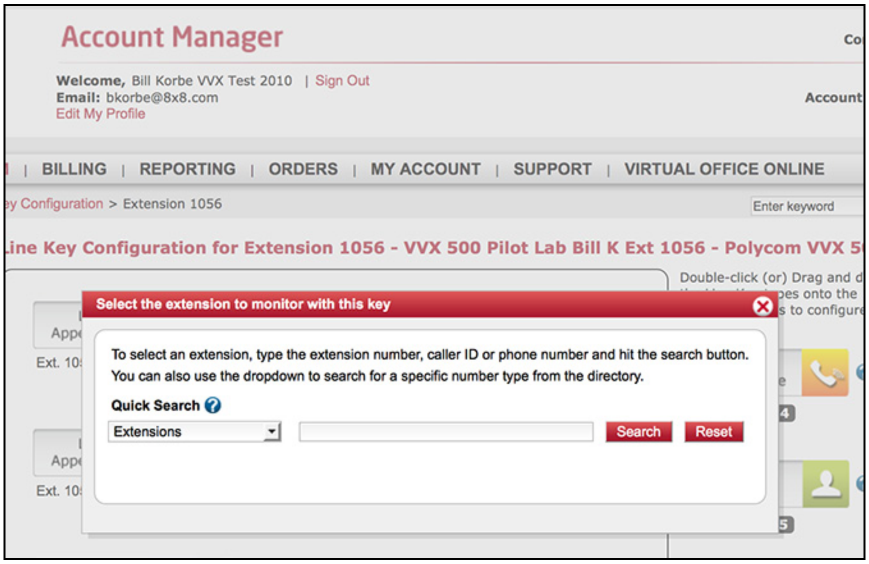
8. Refer to Appendix A for the table for details on the Power Keys Plan and corresponding LAKs and BLFs. There is no limit on the number of speed dials.
9. Drag and drop a desired key type to an unused key in the map.



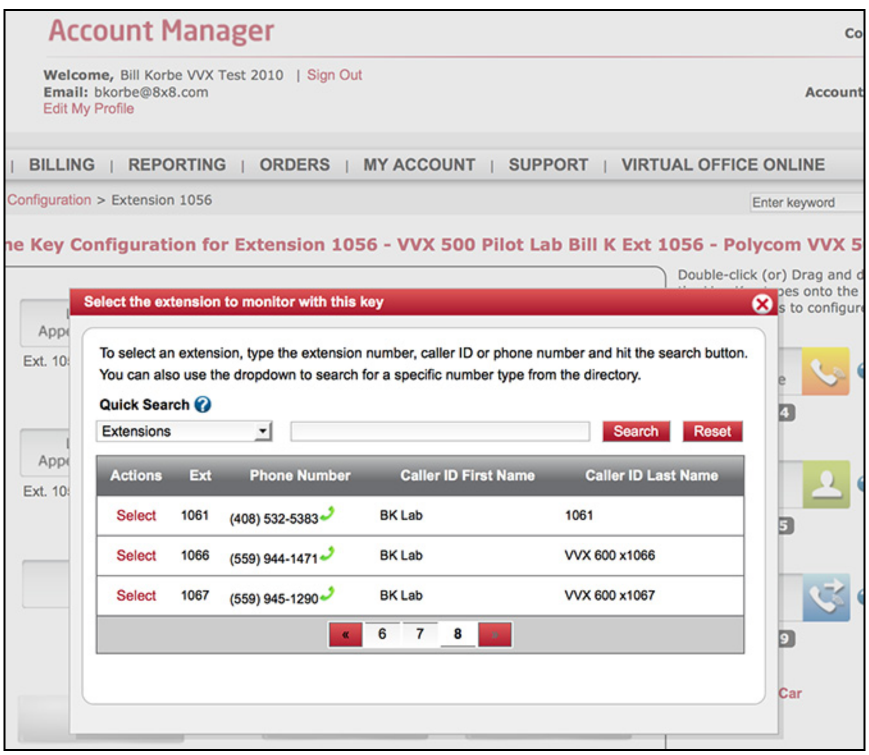
> **Note:** Chrome does not support the drag-and-drop functionality. Click the key for the key type options.

10. **Add Line Appearance Key**

    Drag and drop Line Appearance Key on an unused key, or click on a key for the key type option.



11. **Add Busy Lamp Field Key**
    a. At the prompt, select an extension to monitor.
    b. Enter a desired extension number, or caller ID, or phone number or click **Search**.



c. From the search result, select an extension.

d. Edit the label that shows on the phone.

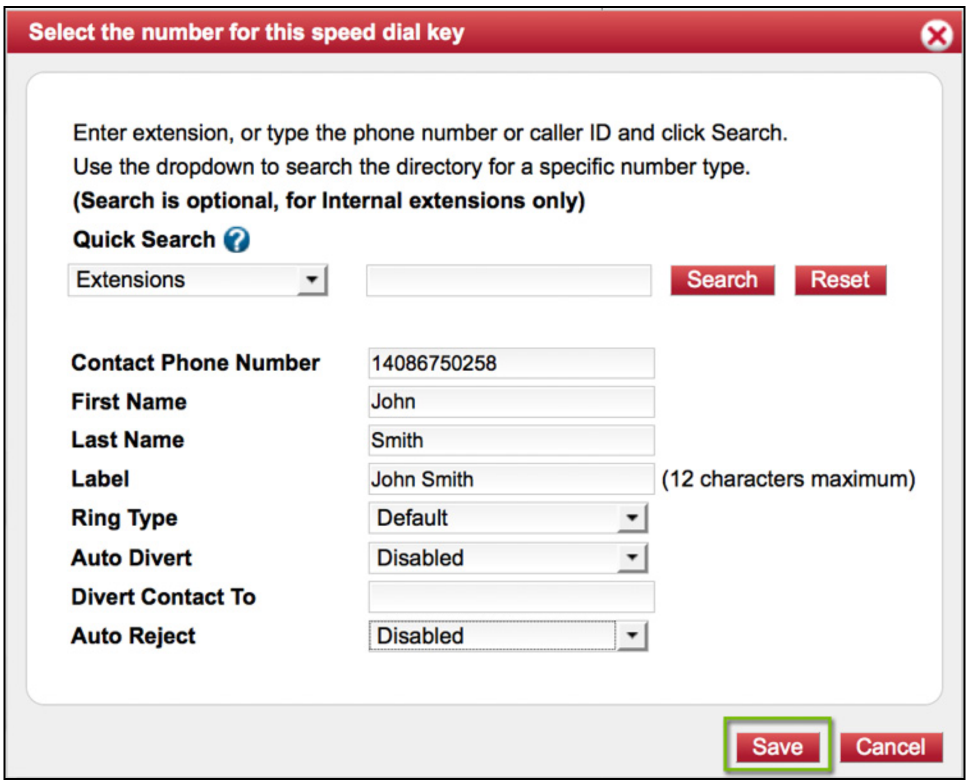
e. Optionally, enable the user to answer calls for this monitored extension.

12. **Add Speed Dial Key**

a. Drag and drop the Speed Dial Key, or click on a key for key type option.

b. At the prompt, select an extension from the contact directory or enter a new number.

c. To add a new contact, add additional details as desired.



13. Click **Save** or continue to configure SideCars.

Configure SideCars

A SideCar is a phone accessory device that attaches to a business phone for additional line call handling and group monitoring. Using the Polycom VVX Expansion Modules known as SideCars, a desktop phone can handle additional Busy Lamp Field (BLF) keys, Line Appearance Keys (LAKs), and Speed Dial keys. With SideCars, you can accept, screen, dispatch, and monitor calls and reduce the number of lost customer calls, shorten transaction times, and increase the accuracy of call routing.

8x8 supports:

- **28-key color display SideCar**: Shows a color display of assigned keys.
- **40-key paper label SideCar**: Requires a paper label of assigned keys. For information on how to print a paper label, refer to Generate Configured Line Key Information.

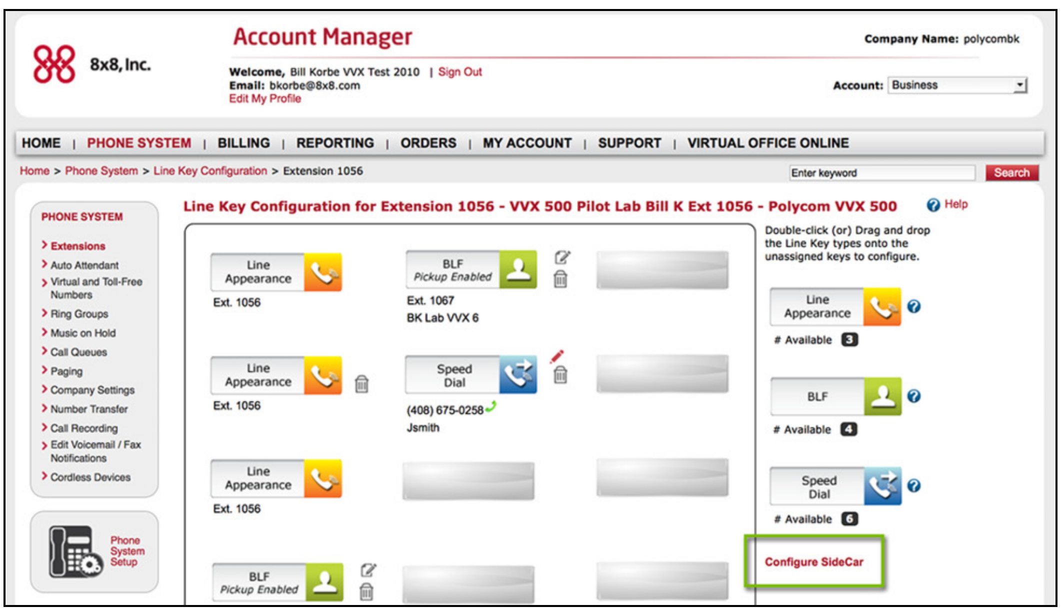
The supported SideCars are compatible with Polycom VVX 300/310, VVX 400/410, VVX 500, and VVX 600.

The SideCars can be configured to support additional pages of either 28 or 40 line keys. By obtaining a VR28 or a VR40 add-on plan, you can match the SideCar size and the number of SideCar keys that a customer requires:

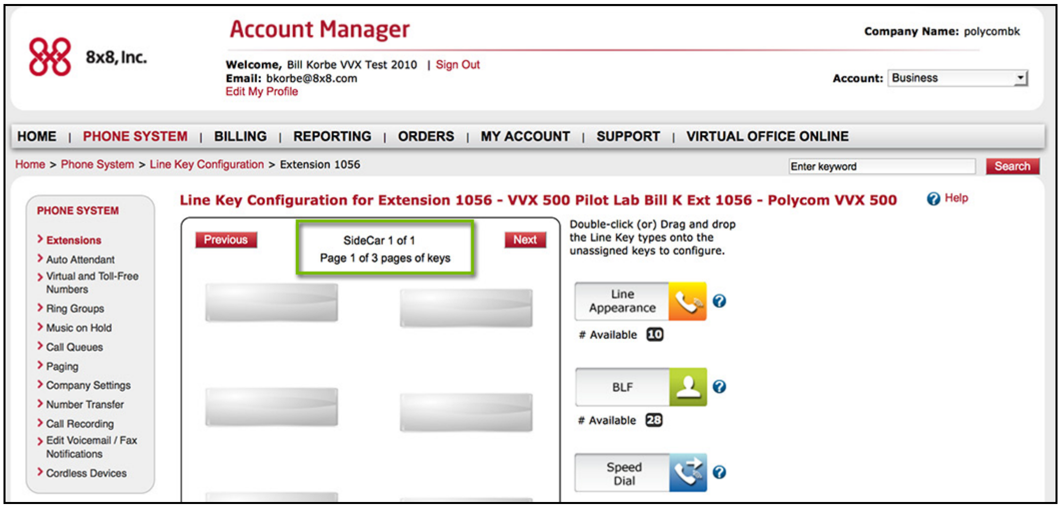
- Each 28-key SideCar supports three logical pages of 28 line keys. Three physical SideCars can be cascaded together for a maximum configuration of up to nine logical pages of 28 additional line keys.
- Each 40-key SideCar supports a single page of 40 line keys. Three physical SideCars can be cascaded together for a maximum configuration of up to three logical pages of 40 additional line keys.

Configure Line Keys for a SideCar

1. Click **Configure SideCar** under the extension's Line Key Configuration.



2. At the prompt, update the number of SideCars attached to the phone.
3. Depending on the SideCar model attached to the extension, the corresponding key map appears on the **Line Key Configuration** screen.



- For each SideCar 28, three map pages of 28 keys.
- For each SideCar 40, single map page of 40 keys.

4. Drag and drop the desired key type to the key map or click on the key for the key type options. You can edit or delete an existing key definition.
5. Follow the process to:
   - Add Line Appearance Key
   - Add Busy Lamp Field Key
   - Add Speed Dial Key
6. Repeat the configuration for all pages of one or more SideCars.

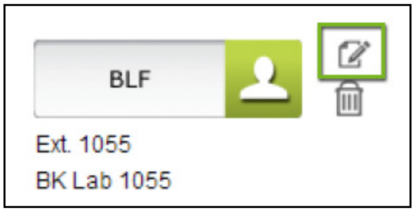
> **Note:** Within each page, drag and drop to reposition line keys. This flexibility is limited to SideCars only and not available on the phone.

7. Click **Save** to complete the configuration.
8. BLF key assignments are validated for any missing extension numbers.
9. At the prompt, click **Reboot Phone** to push the initial line key configuration to the phone and SideCar.

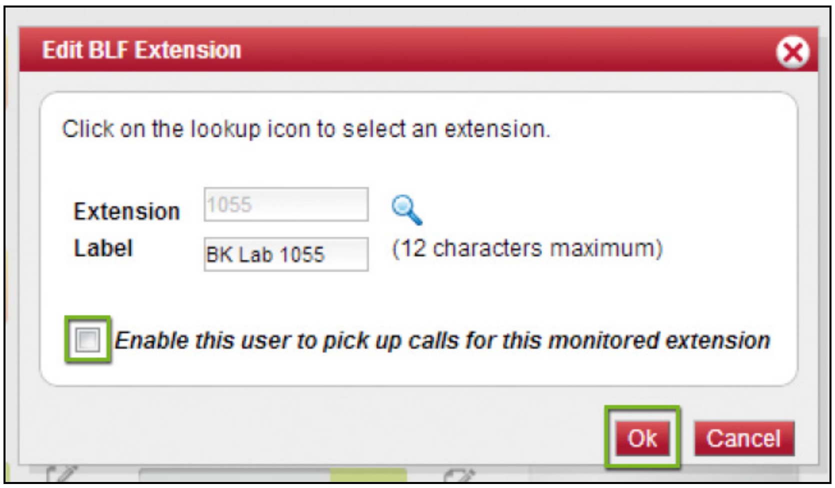
It takes a few minutes for the phone and SideCars to restart.

Add Call Pickup Option to a BLF Key

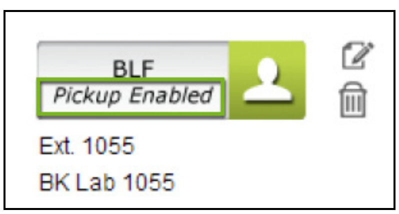
1. To configure **Call Pickup**, select the BLF key you want to enable call pickup for and click to **Edit**.



2. Select the **Enable this user to pick up calls for this monitored extension** check box, and select **Ok**.

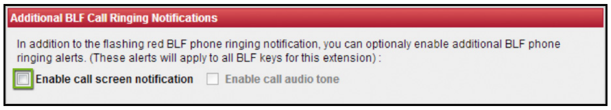


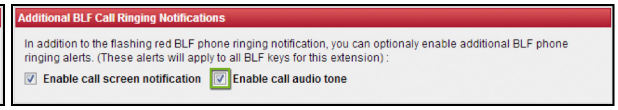
3. The key should now read **Pickup Enabled**.



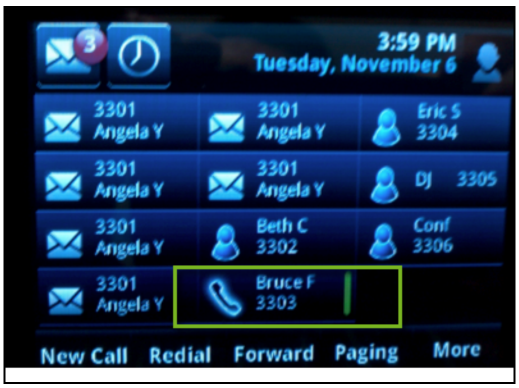
Change BLF Notification Option

If desired (for live receptionists), select the **Enable call screen notification** check box. You can also select the **Enable call audio tone** check box.



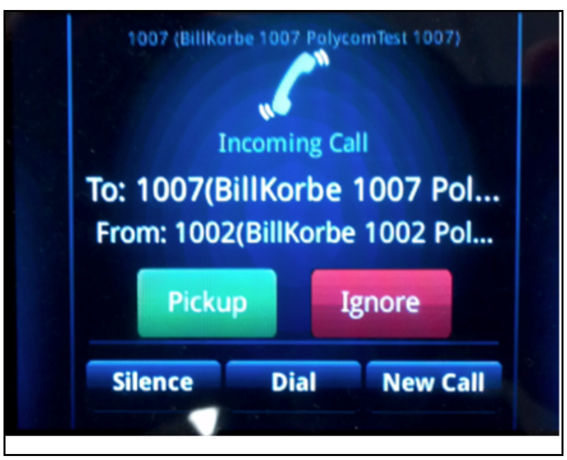


- Normal BLF screen notification (this is default for normal users).



BLF Key flashes to alert you when a monitored set is ringing.

- Call Screen Notification (the splash screen option is recommended for live receptionists).



The full splash screen alerts you when a monitored extension is ringing.

Edit Speed Dial Keys Using Phone Interface

End users can edit speed dials from the phone user interface using indexes for the key positions, and assign to Contact Directory entries.

Identify Line Key Assignments

With your phone in front of you, you can identify which Line Appearance Keys, BLF contacts, and Speed Dials are assigned to each line key on your SideCar from your VVX phone. It gives you the physical line key number.

Note: This is particularly useful for 40-key SideCars.

To identify line key assignments:

1. Press to display the **Home** view.
2. Go to **Settings > Status > Line Key Information**.
3. Press a line key. The assignment and line number for the line key you pressed display on your phone screen.
4. Press the line key twice to return to the previous menu, or tap or select **Back**.

Generate Configured Line Key Information

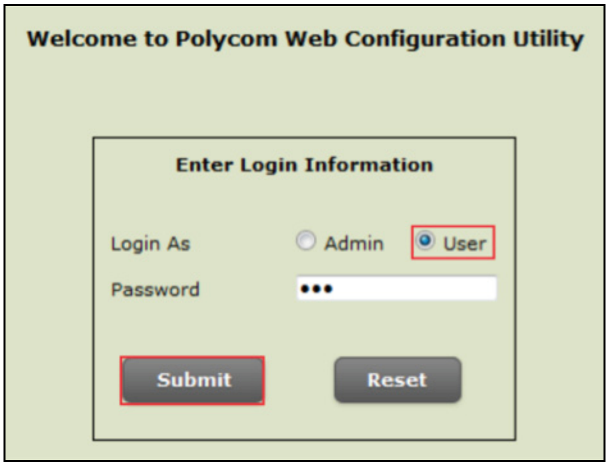
Note: Applicable to paper label SideCars 40-key only.

Using the Polycom Web Configuration Utility, you can generate and download a PDF file with the configured line key information for each 40-key SideCar. The generated PDF enables you to print line key information for line keys on your SideCars, and insert the PDF as a directory card on your 40-key SideCar.

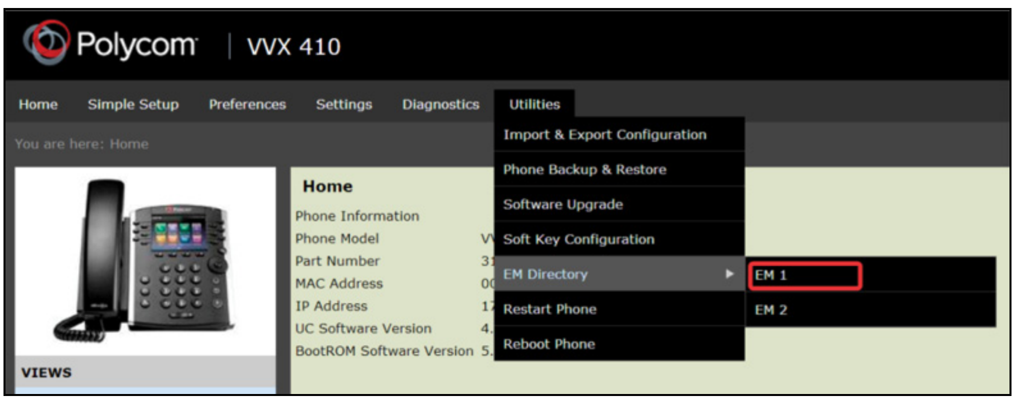
Generate Line Key Information PDF

1. In your Internet browser, enter your phone's IP address into the browser's address bar.

2. Log in as a user with the default password **123**, and select **Submit**.



3. Go to **Utilities > EM Directory**.
4. Select the expansion module you want to generate a PDF for.



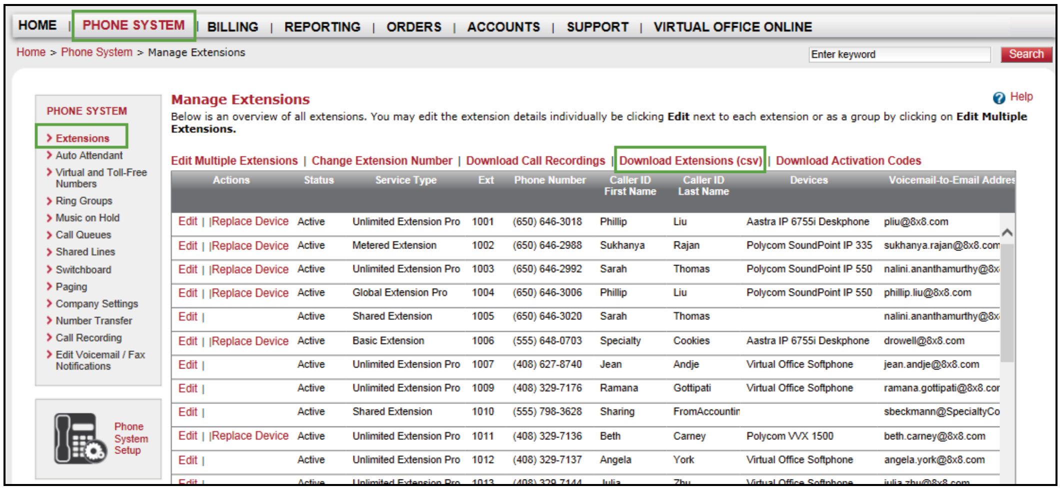
5. In the confirmation dialog, select **Yes** to download the PDF for the configured lines for your expansion module.
6. Go to **Save > Open**.
   The configured line key information for your SideCar displays as a PDF file.
7. Download the PDF, print it, and insert it as the directory card template for the 40-key SideCar.

Download Extensions (CSV)

For your convenience, a Comma-Separated Values (CSV) file is available for download. This file provides information on all extensions.

Access the CSV File

1. Click **Phone System** in the top navigation bar.
2. On **View All Extensions**, click **View**.
3. Click **Download Extensions (csv)**.



4. A file named **Extensions.csv** is downloaded to you computer. The file can be opened in most spreadsheet software, such as Microsoft Excel.

The CSV file shows details for each extension.

Set up Shared Lines

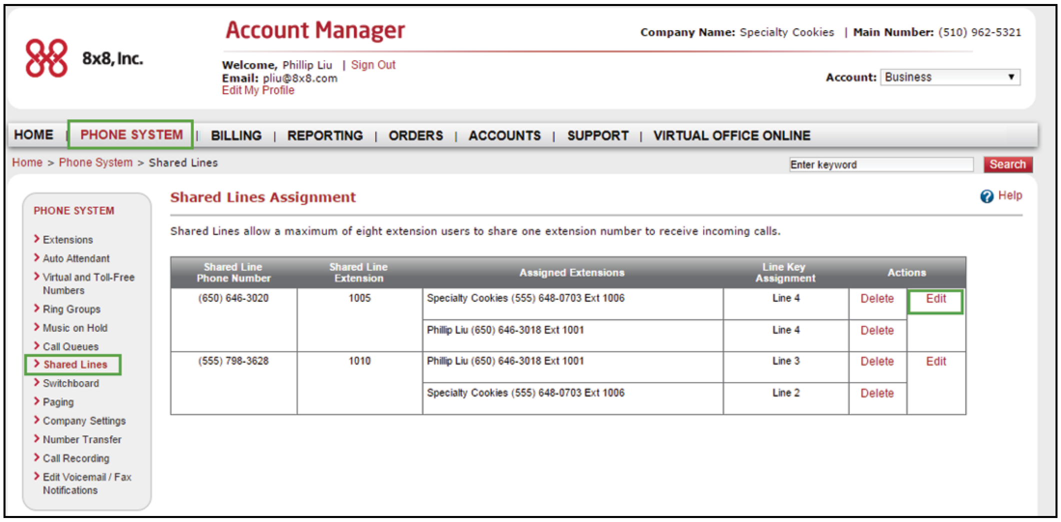
The Shared Lines feature allows a maximum of eight users to share one extension number for outgoing calls. Shared lines are optional, and must be ordered separately.

Note: All shared line extensions must use Aastra phones.

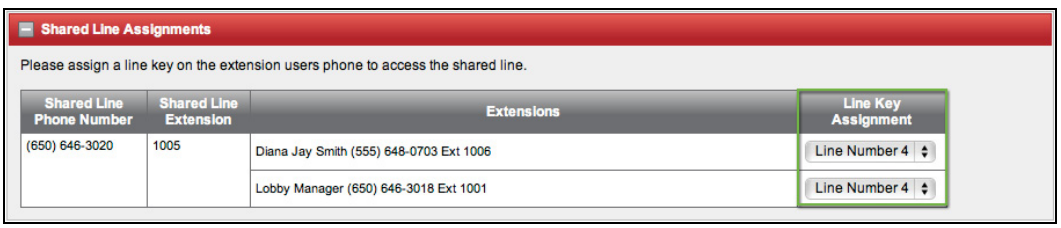
To set up shared lines:

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Shared Lines**.

3. Click **Edit** by the desired shared line.



4. In the **Shared Line Assignments** pane, click the drop-down arrow to select a **Line Key Assignment** for the shared line extension.



5. Click **Save Changes**.

Set up Switchboard Pro

8x8 offers Switchboard Pro, a web-based application that gives a graphical overview of all incoming calls to help you manage your phone system. Once you assign Switchboard Pro to a user profile, a receptionist or switchboard operator can route callers to the desired destination right from the desktop.

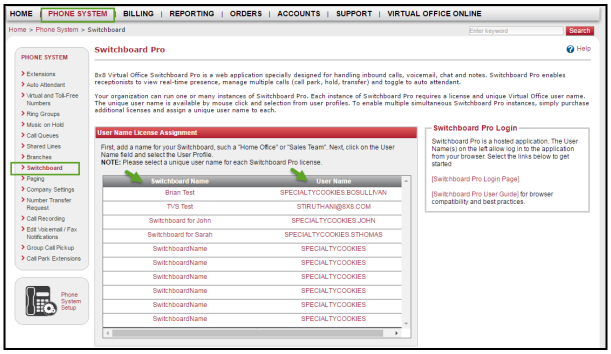
Switchboard Pro is an optional feature that can be purchased separately.

Configure Switchboard Pro

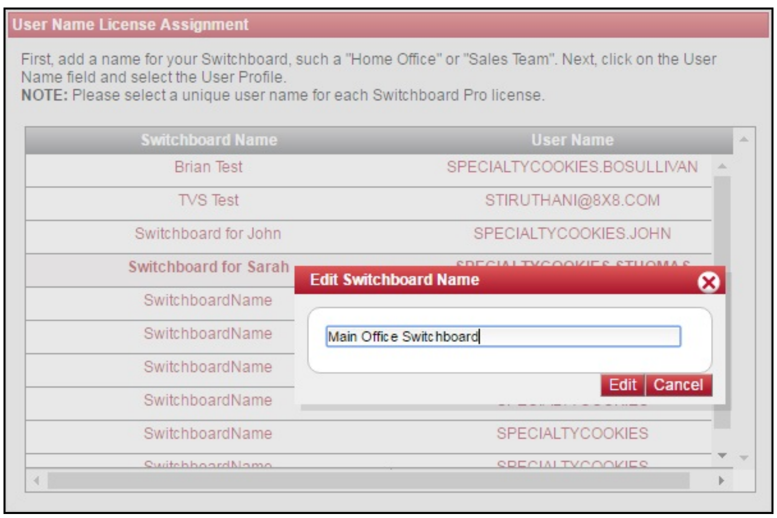
To configure Switchboard Pro, you need to name your switchboard first, and then assign a user profile to it.

To configure a switchboard:

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Switchboard**.
3. On **Switchboard Users**, click **View**.
4. Click under the **Switchboard Name** column.

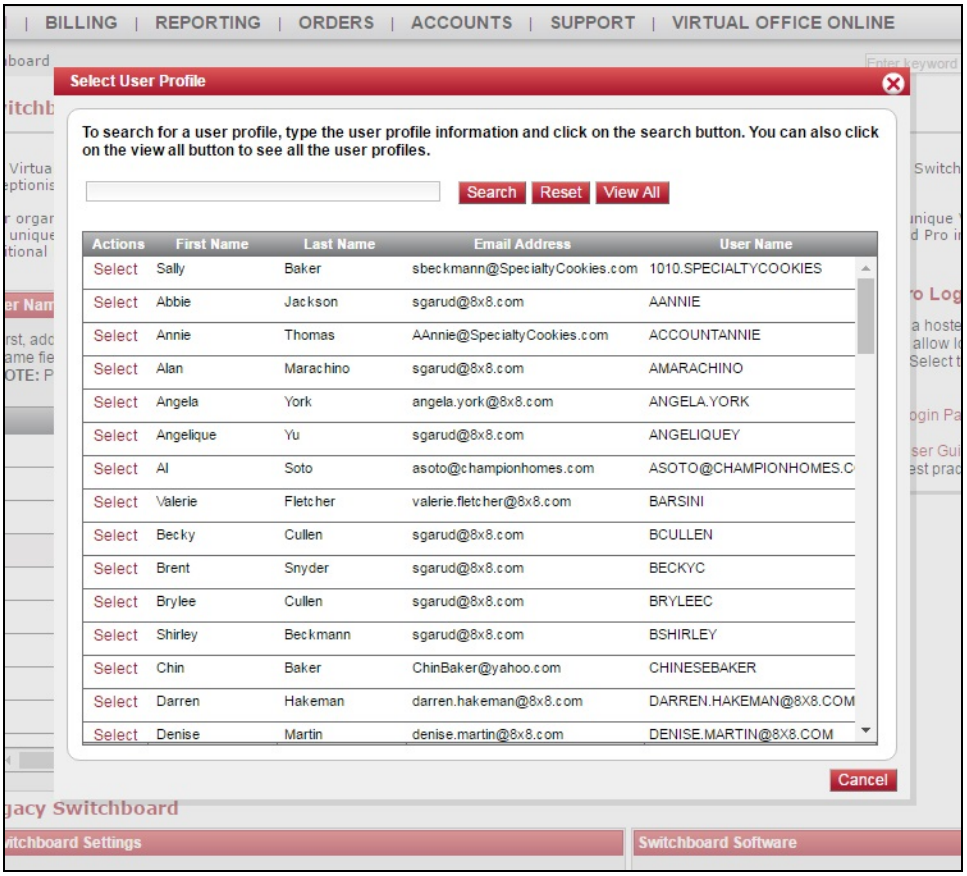


5. Enter a name, and click **Edit**.



6. Click under the **User Name** column.

7. Click **Select** by the desired user profile for the switchboard.



For information on how to launch and use Switchboard Pro, refer to the Switchboard Pro User Guide.

Set up Call Park Extensions

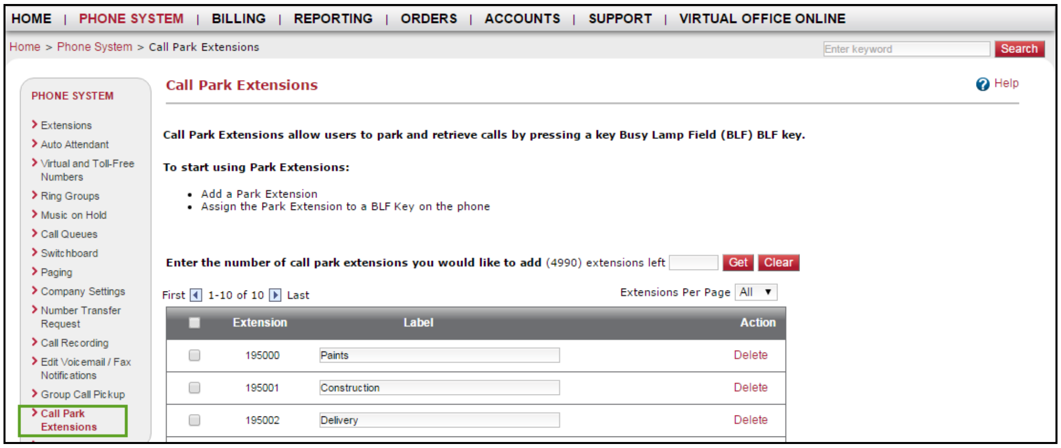
Call Park Extensions is an 8x8 phone system feature, and allows users to park and retrieve calls by pressing a Busy Lamp Field (BLF) key on the phone.
For more information, refer to the Call Park Extensions User Guide.

Step 1: Add a Call Park Extension

In this step, add a call park extension for every single department you want to monitor. In other words, you add a label for each department, and the system automatically assigns a call park extension number for each label you add.

To add a call park extension:

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Call Park Extensions**.



3. Enter the number of call park extensions to create, and click **Get**.
   The extensions are automatically added and listed in the **Extension** table.

> **Note:** Call Park Extensions are added in order: 195000 through 199999. The existing call park range 491, 492, 493, through 699 remains valid but no new extensions are created in that range. Extensions 500, 551 through 559, are reserved for use with other services.

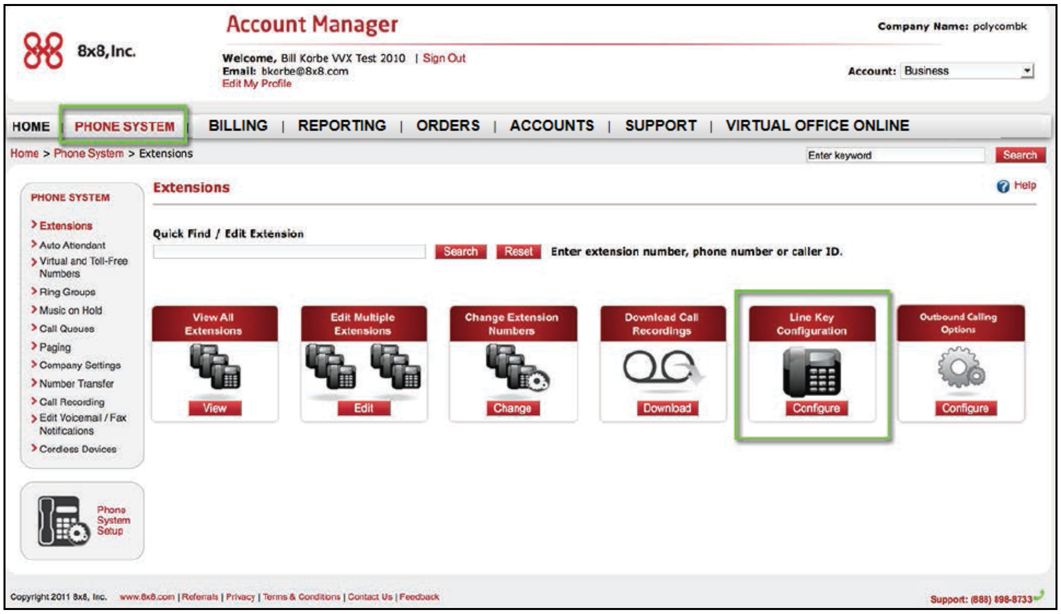
4. Edit the extension names under the **Label** column as needed.

Step 2: Assign the Park Extension to a BLF Key on the Phone

The next step is to assign call park extensions to BLF keys on phone sets. In the use case described here, you need to configure three BLF keys on the phone used by front desk associate. For other departments, however, you add only one BLF key, such as **Paints** for the Paints department, **Lumber** for Lumber, and so on.

To assign call park extensions to a BLF key:

1. Click **Phone System** in the top navigation bar.
2. On **Line Key Configuration**, click **Configure**.

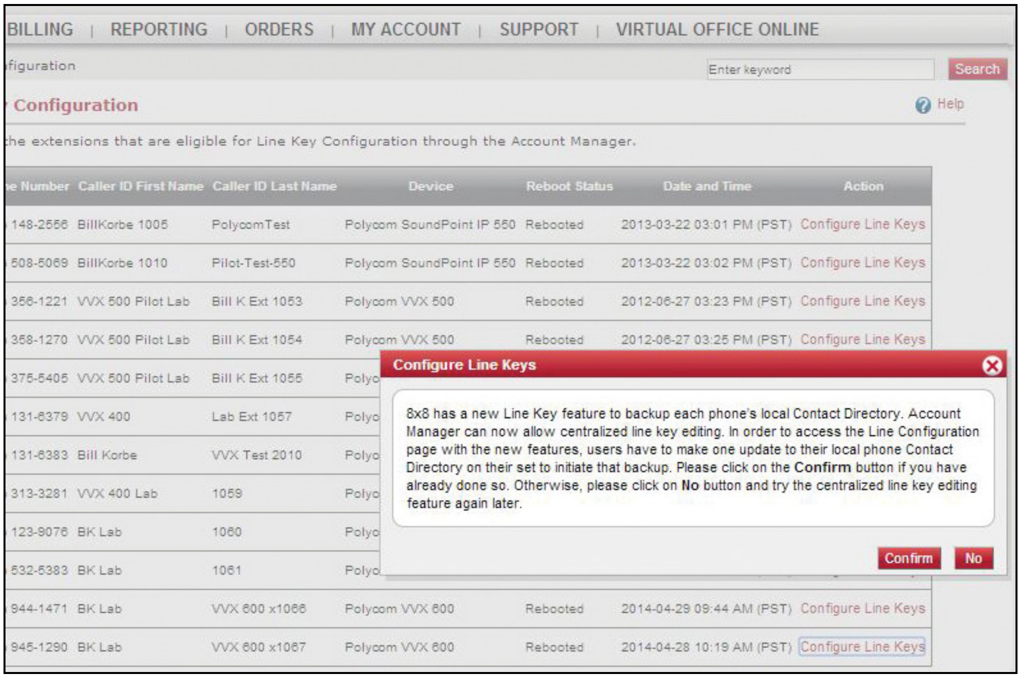


A list of extensions eligible for line key configuration shows.

3. From the list, select an extension, and click **Configure Line Keys**.

Ext	Phone Number	Caller ID First Name	Caller ID Last Name	Device	Reboot Status	Date and Time	Action
1005	(555) 148-2556	BillKorbe 1005	PolycomTest	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:01 PM (PST)	Configure Line Keys
1010	(415) 508-5069	BillKorbe 1010	Pilot-Test-550	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:02 PM (PST)	Configure Line Keys
1054	(557) 358-1270	VVX 500 Pilot Lab	Bill K Ext 1054	Polycom VVX 500	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
1053	(557) 356-1221	VVX 500 Pilot Lab	Bill K Ext 1053	Polycom VVX 500	Rebooted	2012-06-27 03:23 PM (PST)	Configure Line Keys
1056	(557) 377-5541	VVX 500 Pilot Lab	Bill K Ext 1056	Polycom VVX 500	Rebooted	2014-05-07 01:16 PM (PST)	Configure Line Keys
1055	(557) 375-5405	VVX 500 Pilot Lab	Bill K Ext 1055	Polycom VVX 500	Rebooted	2014-01-10 04:58 PM (PST)	Configure Line Keys

You are prompted to back up the Contact Directory or speed dials on the phone.



4. Perform the backup process on your device. For details, refer to backup process below.

Back up Contact Directory from Your Phone Device

Backing up the Contact Directory on the phone device is essential before editing any keys on Account Manager for the first time. It is done automatically once the backup server launches.

Configuring line keys in Account Manager allows central editing after the local directory is saved once to prevent accidental loss of locally-saved contact data on the phone. You can add a dummy new entry on the phone and save it for a quick backup.

To back up Contact Directory from your phone device:

A. Press  to display the **Home** view on the phone.

B. From the menu, go to **Directories > Contact Directory**.

C. Select a contact to edit, or use  to create a new contact.

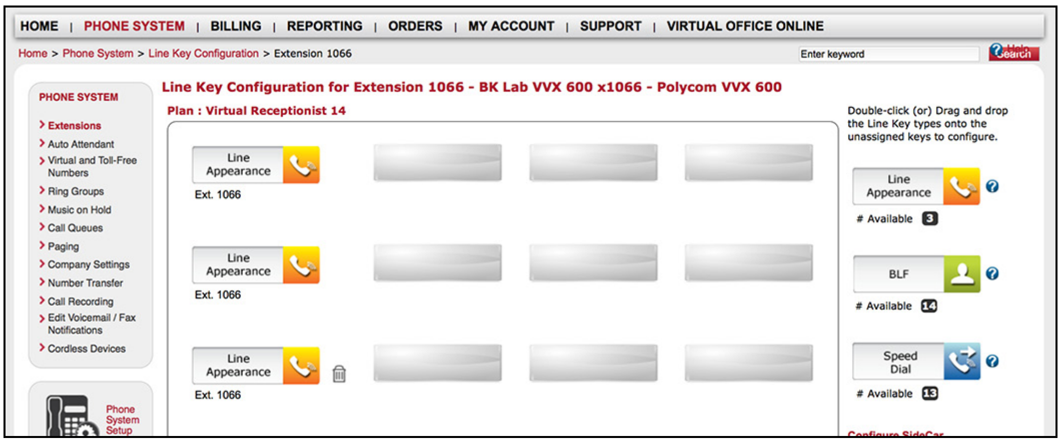
D. To edit a contact:

a. Select a contact, and press **Edit**. Scroll down the list of options, and press **Favorite Index** if you wish to put the contact on Speed Dial.

b. Assign an index according to where you want the contact to display on phone or SideCar.

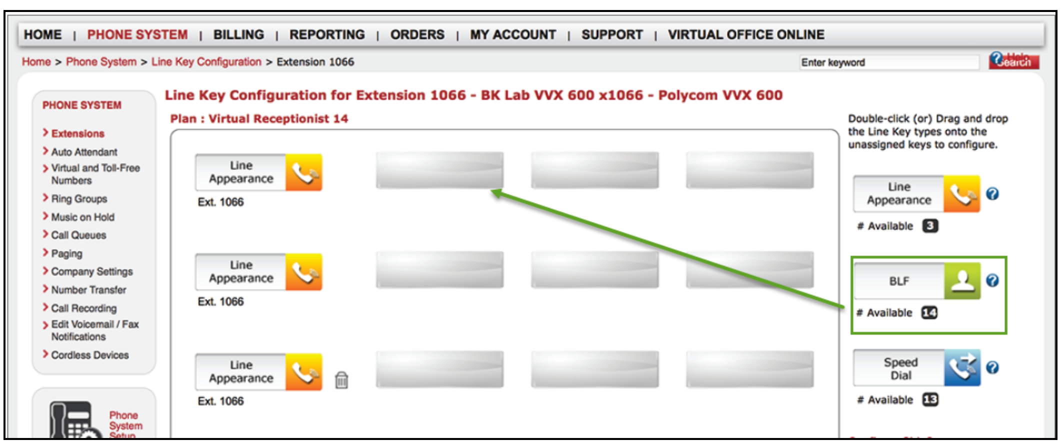
E. **Save** the contact, and back up the Contact Directory.

5. After completing the backup on the phone, click **Confirm** to continue in Account Manager.
6. The **Line Key Configuration** screen shows the device key map with assigned keys and unused spare keys on your phone.

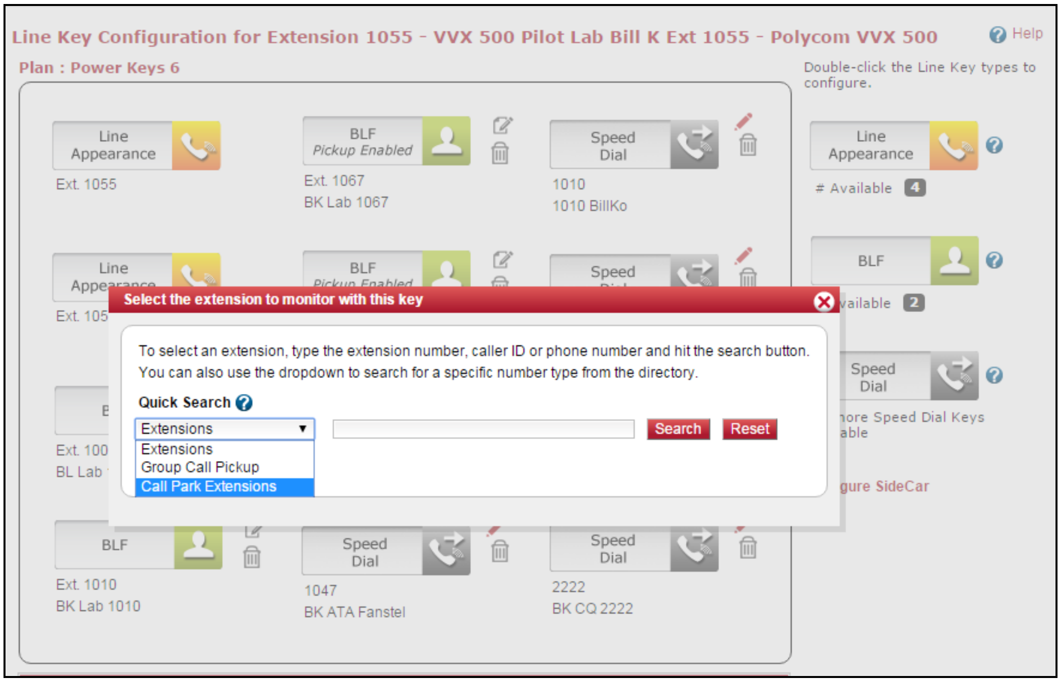


This key map corresponds to the keys on your phone.

7. Drag and drop (or double-click) the BLF key to an unused key in the map.
   You can also edit an existing line key.



The extension selection prompt appears.



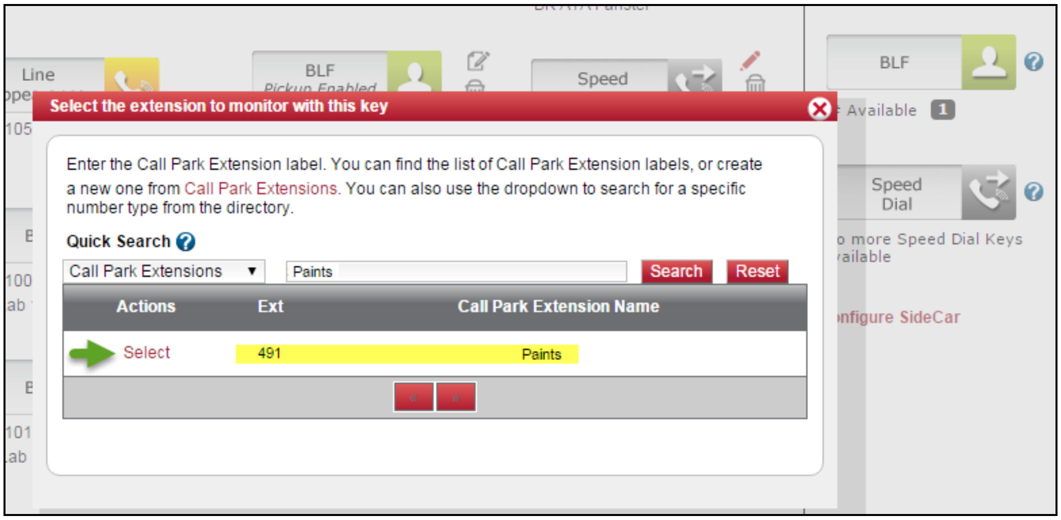
Notes:

-The Chrome browser does not support the drag-and-drop functionality. Double-click the key for the key type options.

-The number of Line Appearance Keys and BLF keys allowed for the extension depends on the Power Keys plan it is associated with.

8. Select **Call Park Extensions** from the menu.

9. Enter the call park extension label you created earlier, and click **Search**.

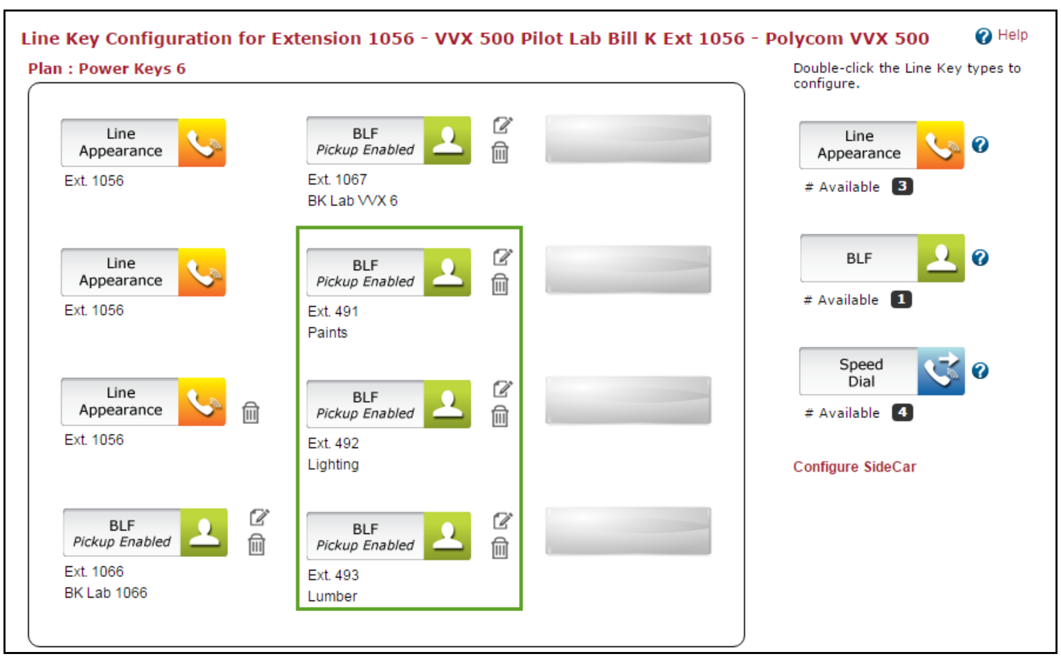


You can also create a label by clicking **Call Park Extensions**.

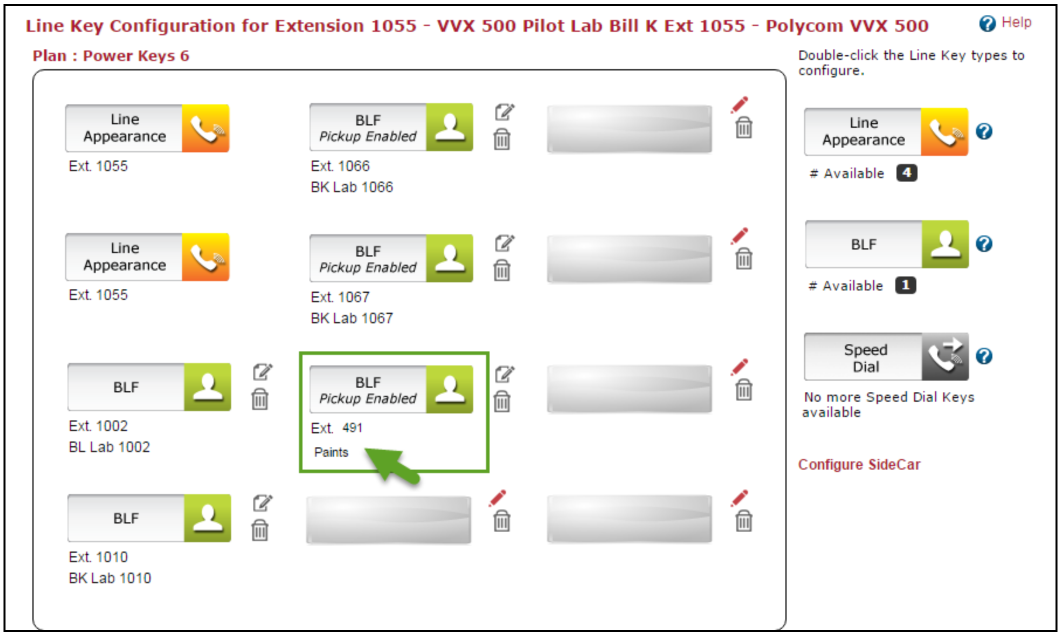
10. Click **Ok**.

The assigned BLF key appears.

For the front desk associate's phone, repeat the above procedure for Lumber and Lighting as well.



For phones used in every other department, you need to create only one BLF key. The following example shows the configuration for the Paints department phone.



How Can I Monitor Calls Using a Call Park Extension?

Monitoring calls via call park extension is performed via desk phone.

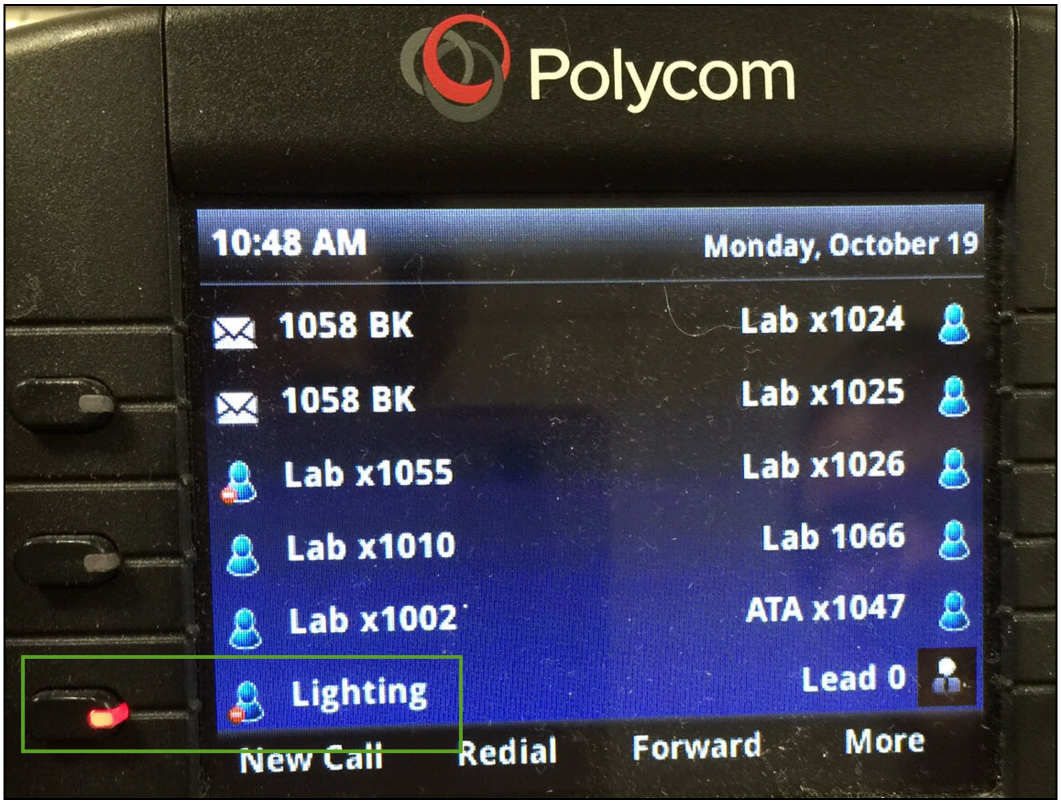
To monitor calls using a call park extension:

1. Receive an inbound call using the phone for front desk associate.
2. If the call is for Lighting, press the BLF key for the Lighting department.

The call is parked to be retrieved by associates in Lighting.

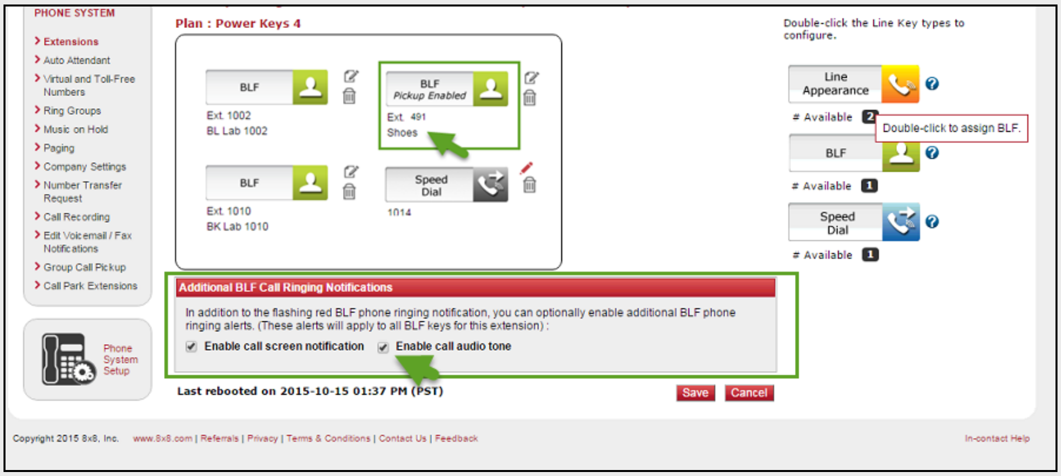
3. Use an intercom call or paging to announce the waiting call.

4. An associate in the Lighting department retrieves the call by pressing the BLF key.



Notes:

-To hear the phone ring, select the **Enable call audio tone** check box when assigning the BLF key in Account Manager.



-If the call is not answered within five minutes, the call will be diverted back to the front desk associate. If the front desk associate is not available, the call goes to the front desk answering machine.

Set up Group Call Pickup

8x8 Group Call Pickup is a simple device-based feature that allows an extension user to answer an incoming call for a teammate in their absence from their desk phone. Group Call Pickup involves creating a Pickup Group with extension users. All members of this group are permitted to pick up incoming calls for other group members in their absence. For details, refer to the Group Call Pickup User Guide.

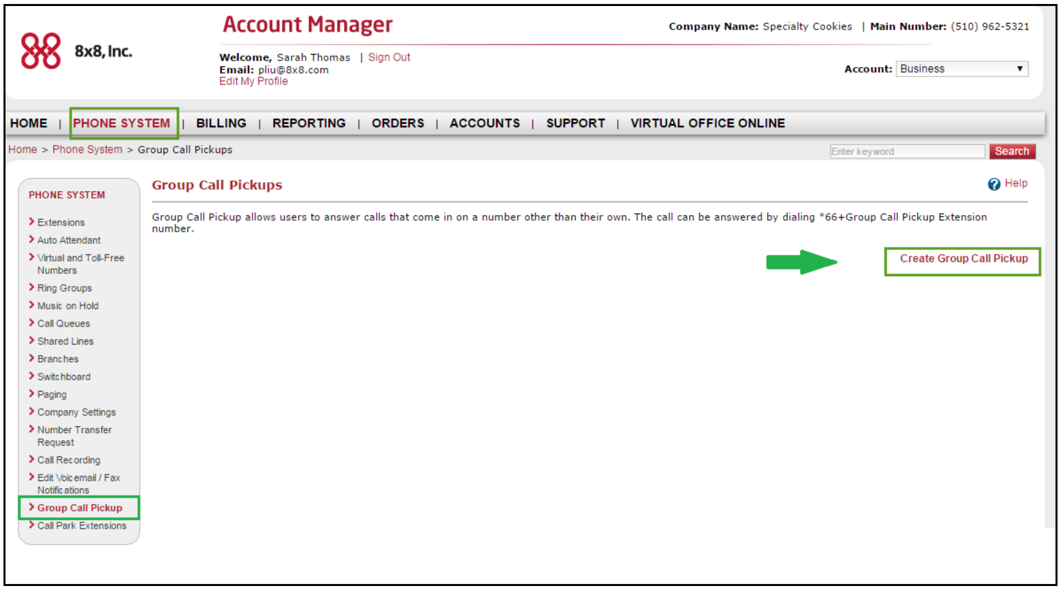
Step 1: Create a List of Desired Extension Users

The list determines the group members who are permitted to pick up calls for others.

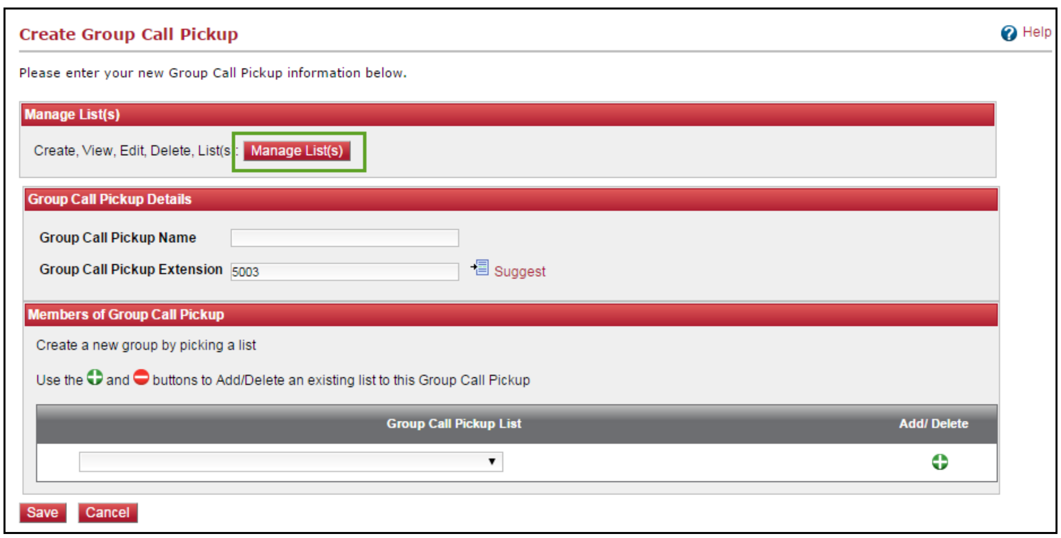
To create a list of desired extension users:

1. Click **Phone System** in the top navigation bar.
2. Under the **Phone System** menu, click **Group Call Pickup**.

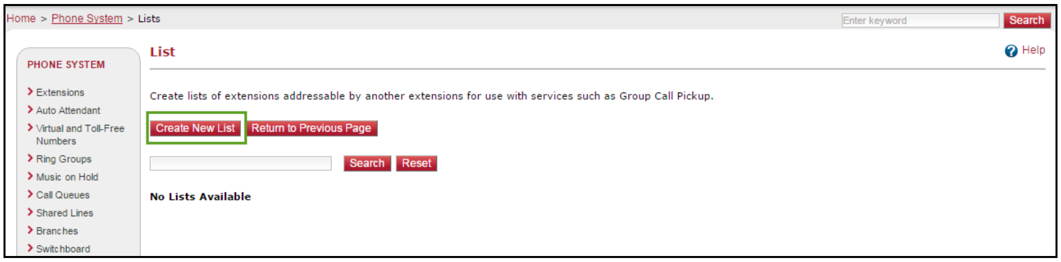
3. Click **Create Group Call Pickup**.



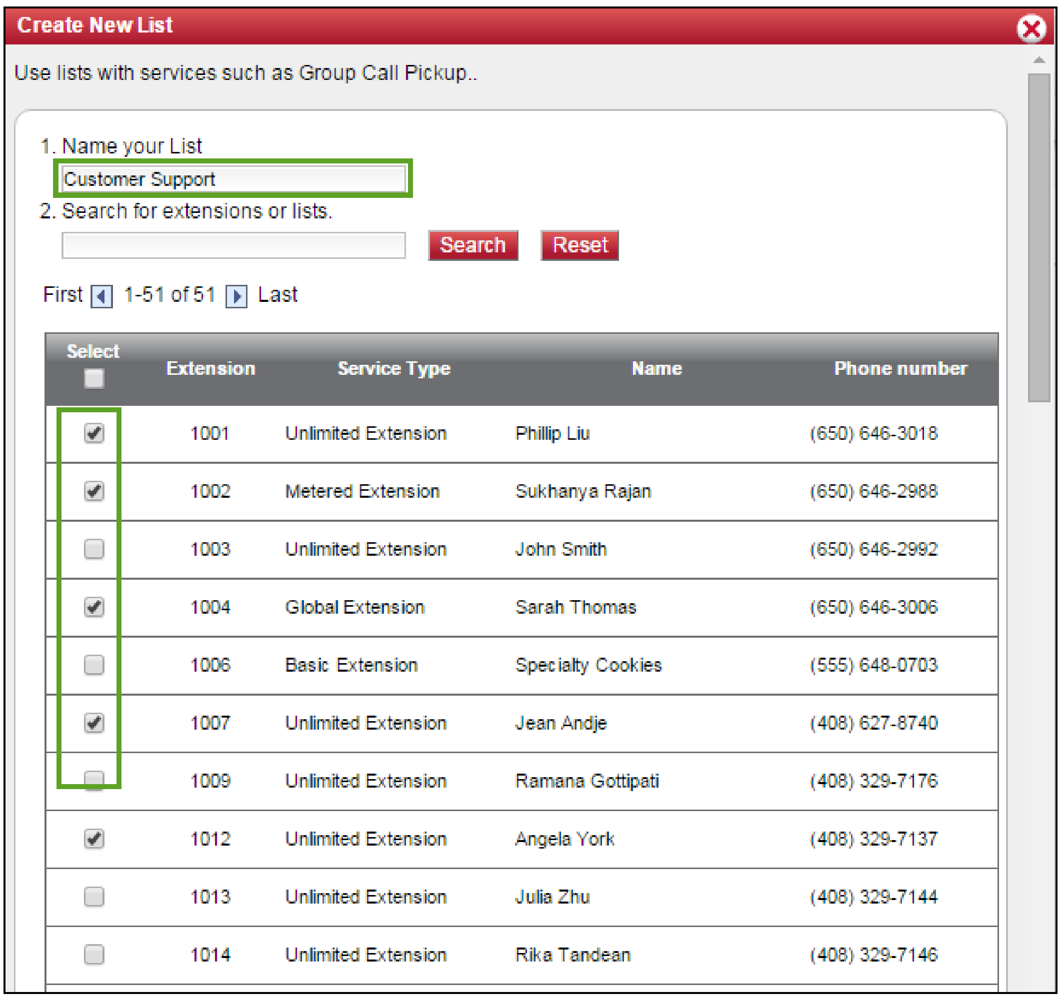
4. Click **Manage List(s)**.



5. Click **Create New List**.



6. Enter a name for the list.
7. Select the extensions you would like to add to the list.



Notes:
-Being a group member denotes permission to answer someone else's phone.
-An extension can belong to multiple groups.

8. Click **Save**.
   A new list appears on the **List** page.

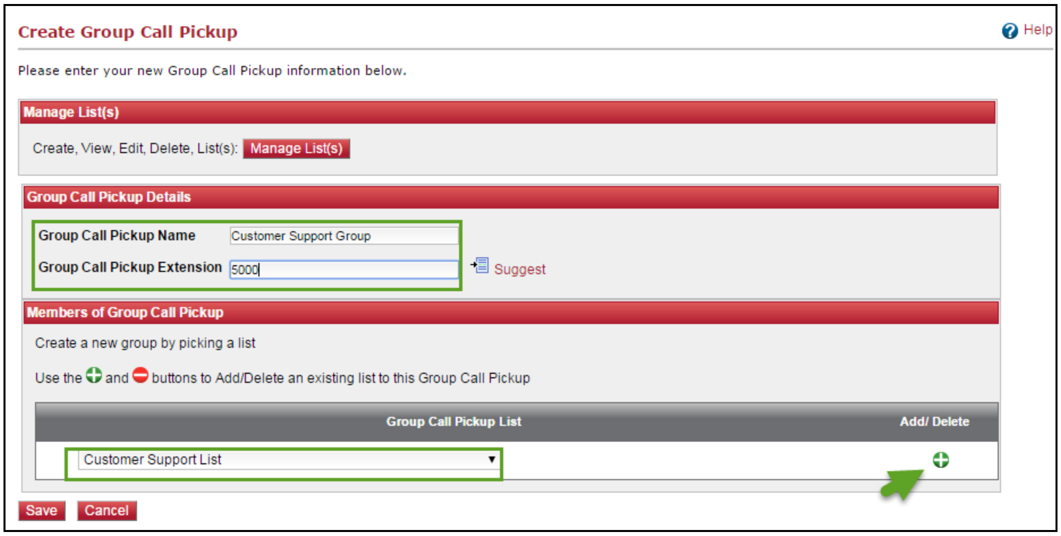
Step 2: Create a Pickup Group by Assigning One or More Lists

To create a pickup group:

1. Click **Return to Previous Page** if you are still on the **List** page.
   OR
   Go to the **Phone System** page, and click **Group Call Pickup** under the **Phone System** menu.
2. Click **Create Group Call Pickup**.

3. Enter a name for the new call pickup group.

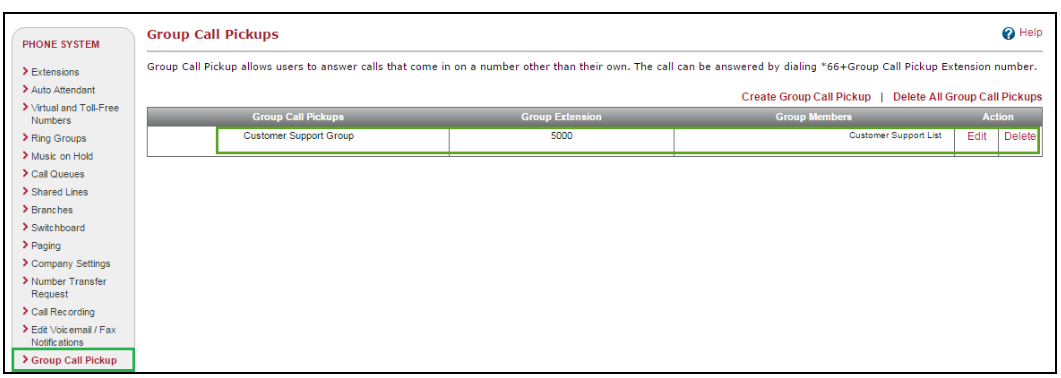
   A **Group Call Pickup Extension** (such as 5000) is automatically assigned to your group.



4. Select and add the extension list you just created.

Note: If you have created the extension lists before, you can view and add them here.

5. Click **Save**.
6. Under the **Phone System** menu, click **Group Call Pickup** to see the new group.



When a pickup group is created, the users get an email notification regarding the group, the group extension number, and how to use the extension number.

8x8, Inc.

Subject: You have been added to Group Call Pickup

Dear <User Name>,

The Group Call Pickup extension number is : 5000

To pick up a phone call for your group, dial *66 + Group Call Pickup Extension.

You can also add: *66 + Group Call Pickup Extension to your phone as a speed dial either directly on the phone (for more info see: link) or in account manager (for more info see: link).

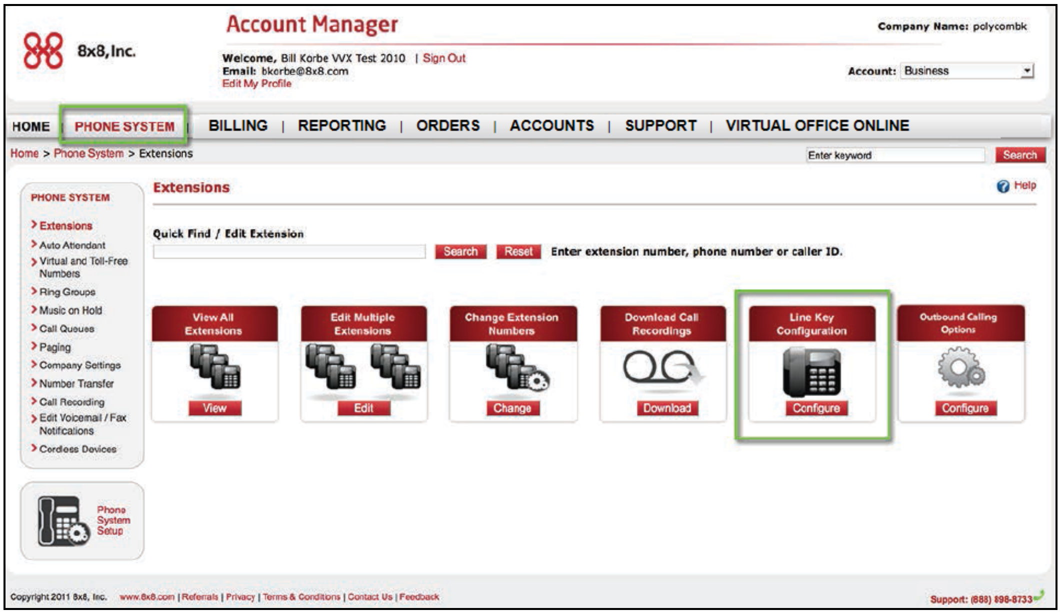
Sincerely,
Customer Support

Step 3: (Optional) Define BLF and Speed Dial Keys for Group Call Pickup Number

BLF is an add-on feature that is bundled with the 8x8 Power Keys functionality. You need to subscribe to 8x8 Power Keys to perform the following procedure:

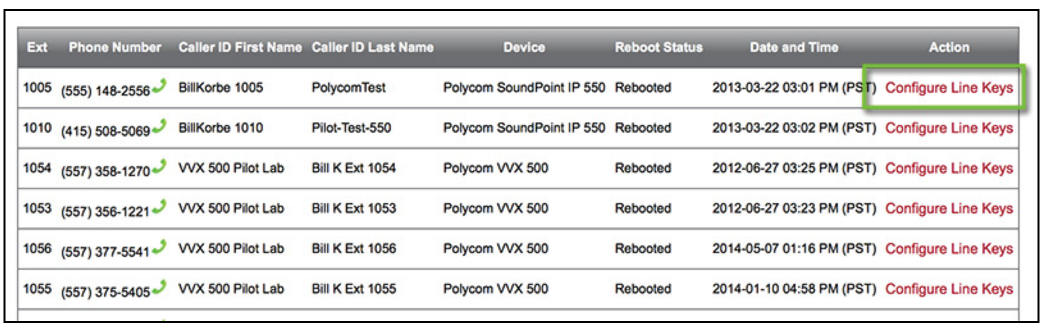
To define BLF keys Group Call Pickup number:

1. Click **Phone System** in the top navigation bar.
2. On **Line Key Configuration**, click **Configure**.



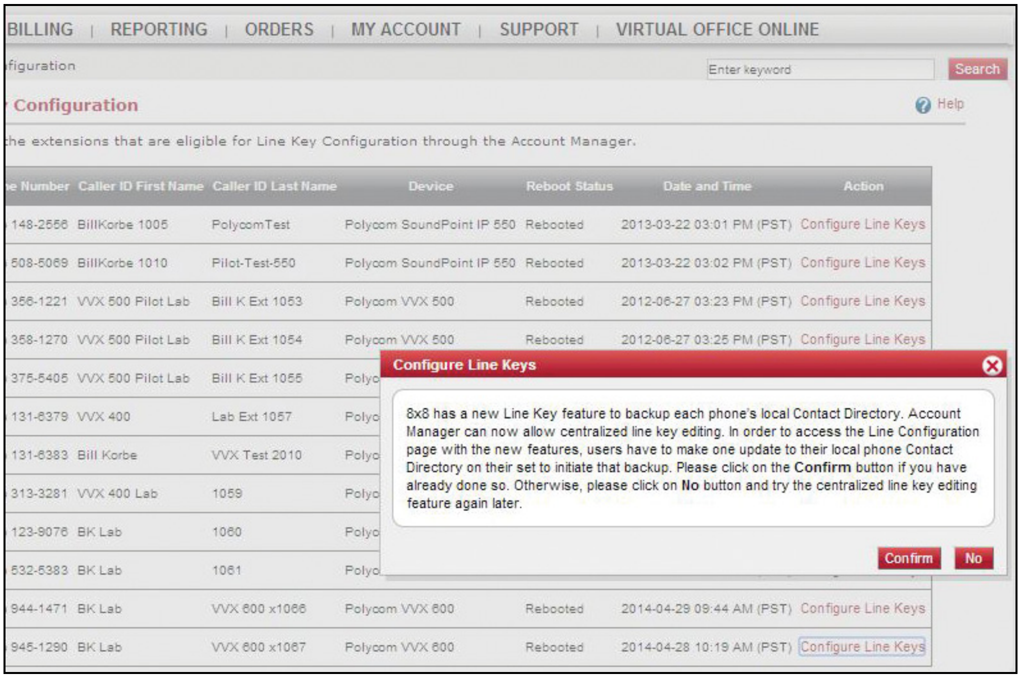
A list of extensions eligible for line key configuration shows.

3. From the list, select an extension, and click **Configure Line Keys**.



Ext	Phone Number	Caller ID First Name	Caller ID Last Name	Device	Reboot Status	Date and Time	Action
1005	(555) 148-2556	BillKorbe 1005	PolycomTest	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:01 PM (PST)	Configure Line Keys
1010	(415) 508-5069	BillKorbe 1010	Pilot-Test-550	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:02 PM (PST)	Configure Line Keys
1054	(557) 358-1270	VVX 500 Pilot Lab	Bill K Ext 1054	Polycom VVX 500	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
1053	(557) 356-1221	VVX 500 Pilot Lab	Bill K Ext 1053	Polycom VVX 500	Rebooted	2012-06-27 03:23 PM (PST)	Configure Line Keys
1056	(557) 377-5541	VVX 500 Pilot Lab	Bill K Ext 1056	Polycom VVX 500	Rebooted	2014-05-07 01:16 PM (PST)	Configure Line Keys
1055	(557) 375-5405	VVX 500 Pilot Lab	Bill K Ext 1055	Polycom VVX 500	Rebooted	2014-01-10 04:58 PM (PST)	Configure Line Keys

You are prompted to back up the Contact Directory or speed dials on the phone.



4. Perform the backup process on your device. For details, refer to backup process below.

Back up Contact Directory from Your Phone Device

Backing up the Contact Directory on the phone device is essential before editing any keys on Account Manager for the first time. It is done automatically once the backup server launches.

Configuring line keys in Account Manager allows central editing after the local directory is saved once to prevent accidental loss of locally-saved contact data on the phone. You can add a dummy new entry on the phone and save it for a quick backup.

To back up Contact Directory from your phone device:

A. Press to display the **Home** view on the phone.

B. From the menu, go to **Directories > Contact Directory**.

C. Select a contact to edit, or use to create a new contact.

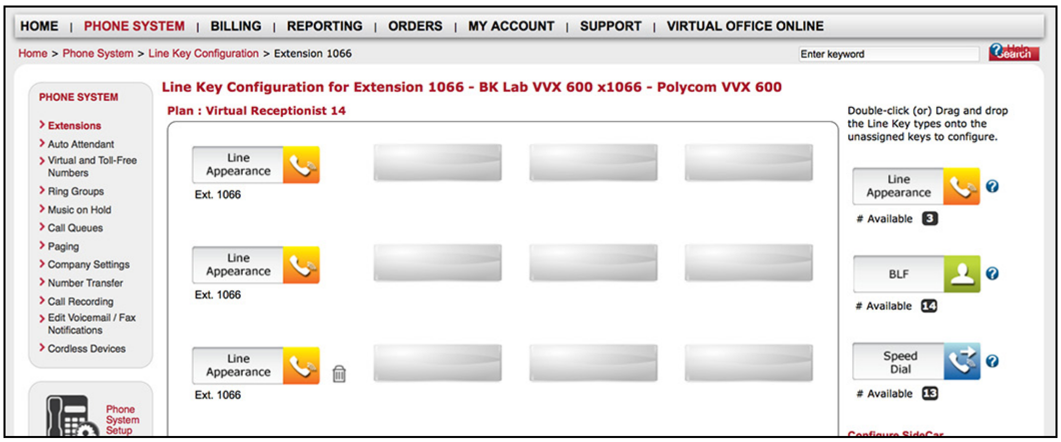
D. To edit a contact:

a. Select a contact, and press **Edit**. Scroll down the list of options, and press **Favorite Index** if you wish to put the contact on Speed Dial.

b. Assign an index according to where you want the contact to display on phone or SideCar.

E. **Save** the contact, and back up the Contact Directory.

5. After completing the backup on the phone, click **Confirm** to continue in Account Manager.
6. The **Line Key Configuration** screen shows the device key map with assigned keys and unused spare keys on your phone.



This key map corresponds to the keys on your phone.

7. On the side of the page, the following assignment key types are listed:
   - **Busy Lamp Field (BLF) Key**: Use to track the status of other extension users on the same PBX.
   - **Speed Dial Key**: Use to quickly dial out to most frequently-used number.

Note: The number of BLF keys allowed for the extension depends on the Power Keys plan it is associated with.

8. Refer to Appendix A for the table for details on the Power Keys Plan and corresponding BLFs. There is no limit on the number of speed dials.

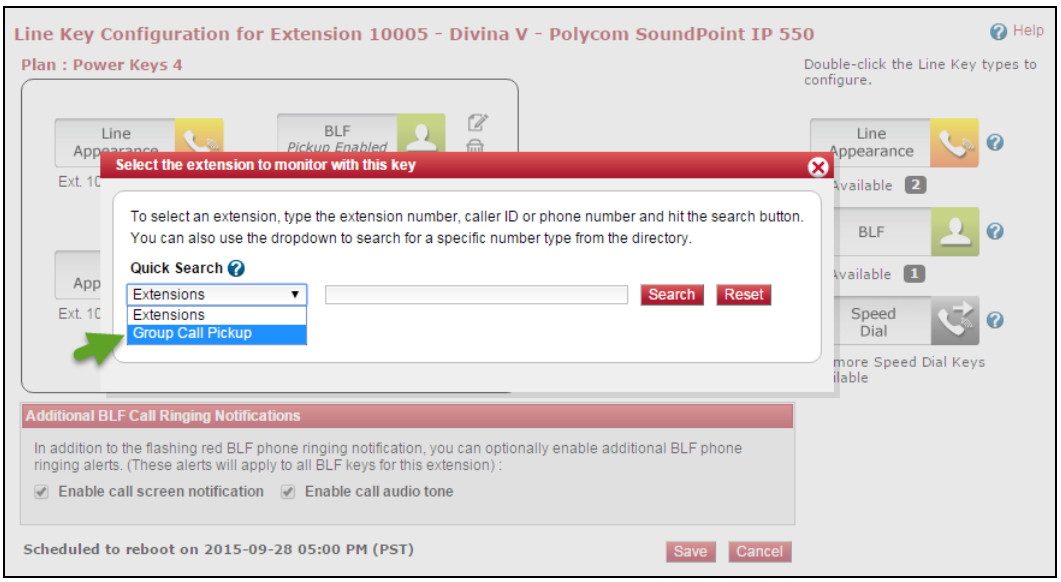
9. Drag and drop a desired key type to an unused key in the map.

> **Note:** Chrome does not support the drag-and-drop functionality. Click the key for the key type options.

10. **Add a BLF Key**

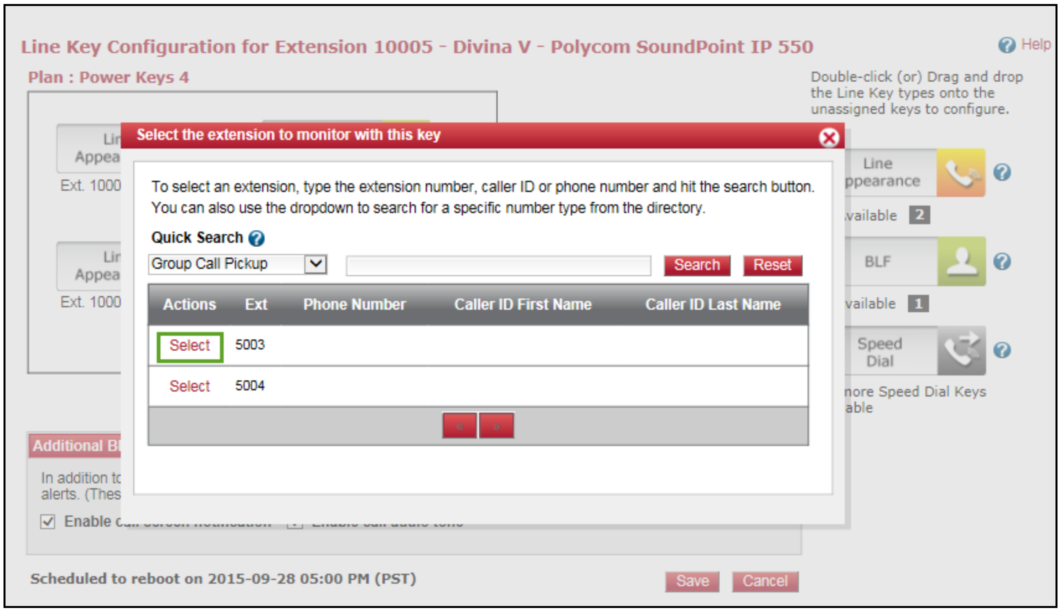
    a. Drag and drop a BLF key on an unused key, or click on a key for the key type option.

    b. At the prompt, select **Group Call Pickup** under **Quick Search**.



    c. Click **Search**.

d. Find the Group Call Pickup extension you just created from the list, and click **Select**.

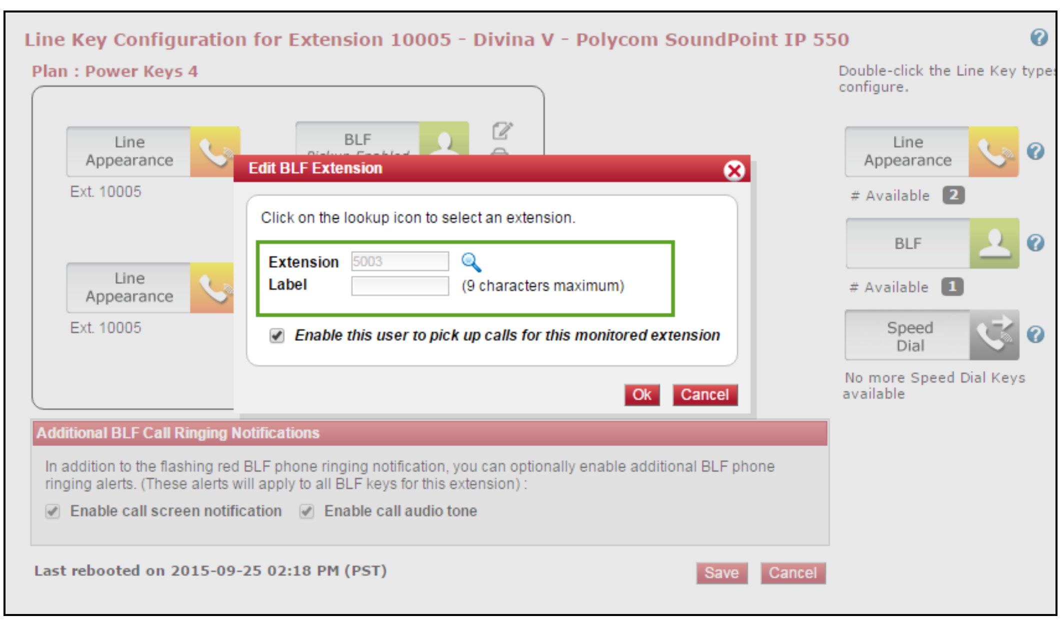


The **Edit BLF Extension** window opens.

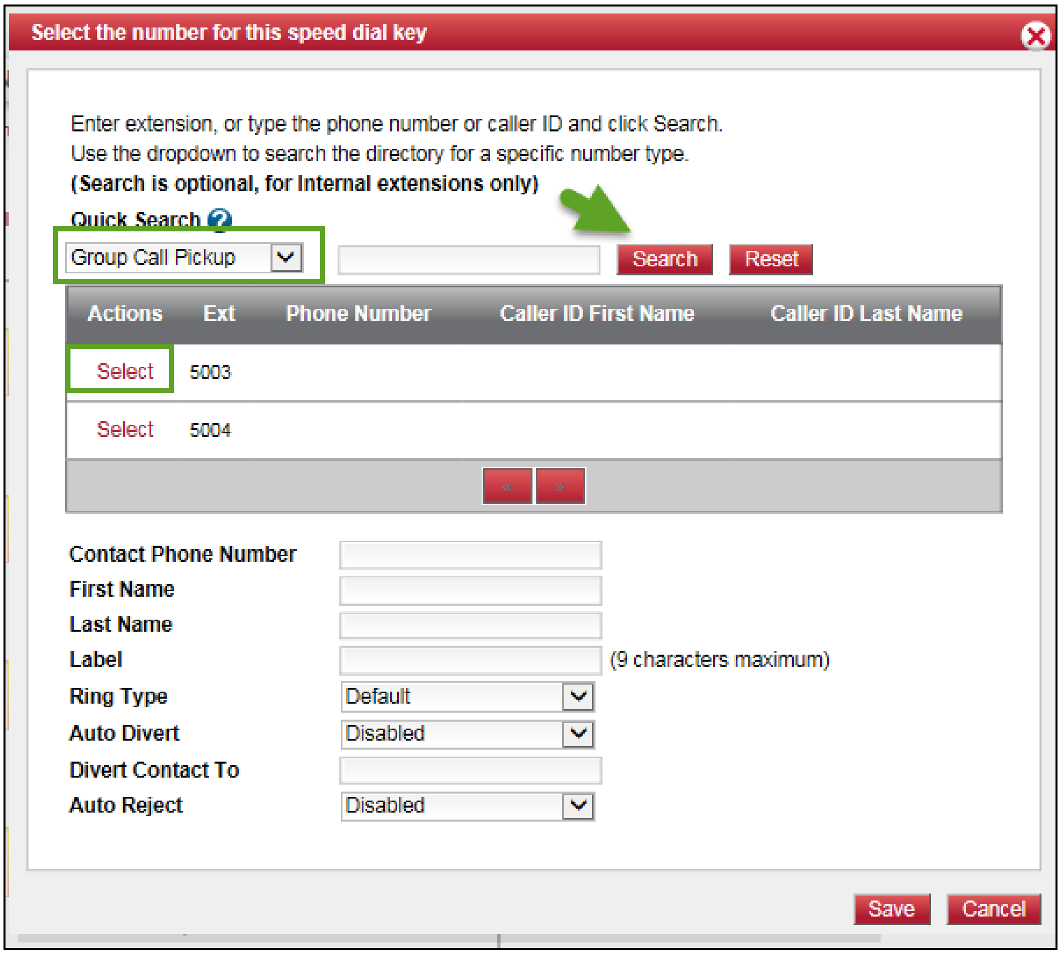
e. Enter the Group Call Pickup extension.

f. Edit the label that shows on the phone.

g. Optionally, allow the user to answer calls for this monitored extension.



11. **Add a Speed Dial Key**
    a. Drag and drop the **Speed Dial Key**, or click on a key for key type option.
    b. At the prompt, select **Group Call Pickup** under **Quick Search**.
    c. Click **Search**.
    d. Select the **Group Call Pickup** extension from the list.



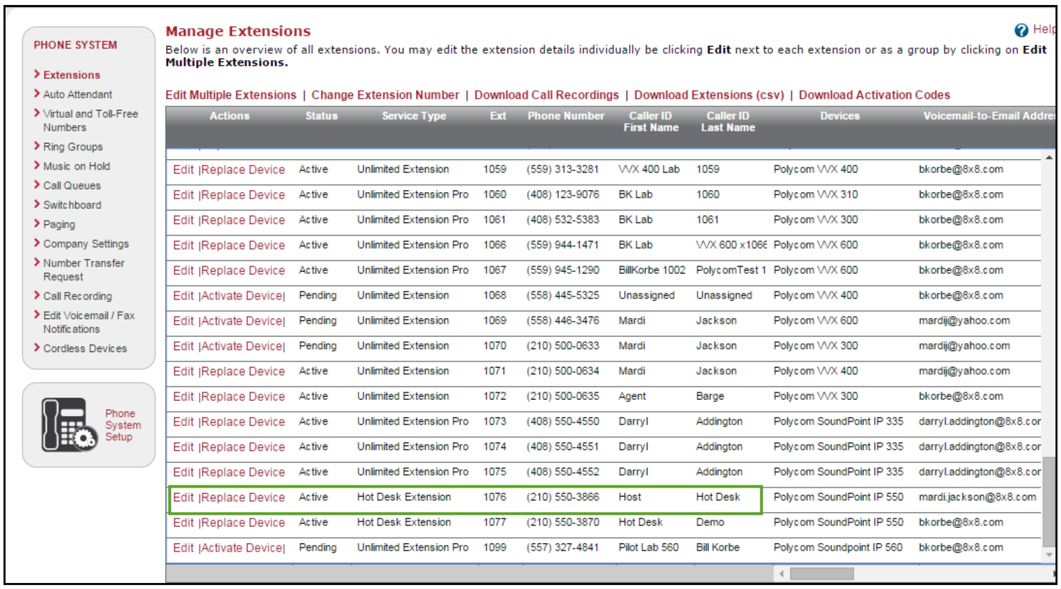
    e. To add a new contact, add additional details as desired.
12. Click **Save**.

Set up Hot Desk

With the 8x8 Hot Desk feature, employees log into a shared phone that immediately behaves like their own extension. They can make and receive calls, and check their messages. 8x8 Hot Desk extensions help employees have a more personalized, secure, and convenient phone experience, whether traveling to other offices or working a shift at a shared desk. For more details on this feature, refer to the Hot Desk User Guide. You can configure the caller ID and emergency service address for this extension in Account Manager. Work with your 8x8 sales agent to place an order for Hot Desk hot lines. Once the order is processed, the Hot Desk phone extension numbers in Account Manager are listed under **Phone System > Extensions**.

To configure a Hot Desk extension:

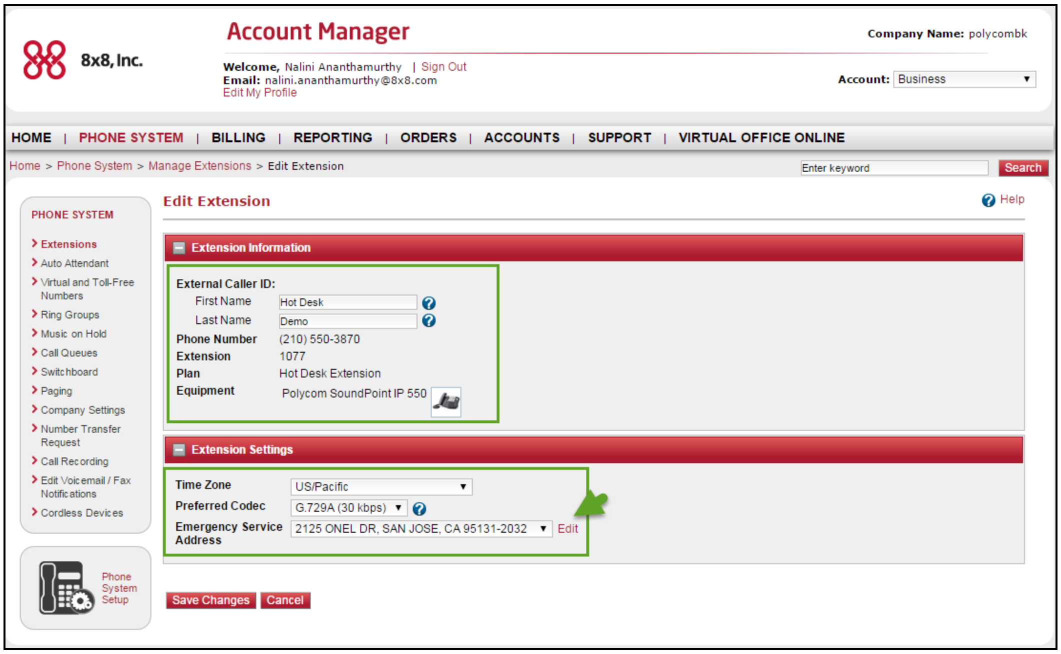
1. Click **Phone System** in the top navigation bar.
2. On **View All Extensions**, click **View**.
3. Find the Hot Desk extension number, and click **Edit**.



Actions	Status	Service Type	Ext	Phone Number	Caller ID First Name	Caller ID Last Name	Devices	Voicemail-to-Email Addre
Edit |Replace Device	Active	Unlimited Extension	1059	(559) 313-3281	VVX 400 Lab	1059	Polycom VVX 400	bkorbe@8x8.com
Edit |Replace Device	Active	Unlimited Extension Pro	1060	(408) 123-9076	BK Lab	1060	Polycom VVX 310	bkorbe@8x8.com
Edit |Replace Device	Active	Unlimited Extension Pro	1061	(408) 532-5383	BK Lab	1061	Polycom VVX 300	bkorbe@8x8.com
Edit |Replace Device	Active	Unlimited Extension Pro	1066	(559) 944-1471	BK Lab	VVX 600 x1066	Polycom VVX 600	bkorbe@8x8.com
Edit |Replace Device	Active	Unlimited Extension Pro	1067	(559) 945-1290	BillKorbe 1002	PolycomTest 1	Polycom VVX 600	bkorbe@8x8.com
Edit |Activate Device|	Pending	Unlimited Extension	1068	(558) 445-5325	Unassigned	Unassigned	Polycom VVX 400	bkorbe@8x8.com
Edit |Activate Device|	Pending	Unlimited Extension	1069	(558) 446-3476	Mardi	Jackson	Polycom VVX 600	mardij@yahoo.com
Edit |Activate Device|	Pending	Unlimited Extension	1070	(210) 500-0633	Mardi	Jackson	Polycom VVX 300	mardij@yahoo.com
Edit |Replace Device	Active	Unlimited Extension	1071	(210) 500-0634	Mardi	Jackson	Polycom VVX 400	mardij@yahoo.com
Edit |Replace Device	Active	Unlimited Extension	1072	(210) 500-0635	Agent	Barge	Polycom VVX 300	bkorbe@8x8.com
Edit |Replace Device	Active	Unlimited Extension Pro	1073	(408) 550-4550	Darryl	Addington	Polycom SoundPoint IP 335	darryl.addington@8x8.cor
Edit |Replace Device	Active	Unlimited Extension Pro	1074	(408) 550-4551	Darryl	Addington	Polycom SoundPoint IP 335	darryl.addington@8x8.cor
Edit |Replace Device	Active	Unlimited Extension Pro	1075	(408) 550-4552	Darryl	Addington	Polycom SoundPoint IP 335	darryl.addington@8x8.cor
Edit |Replace Device	Active	Hot Desk Extension	1076	(210) 550-3866	Host	Hot Desk	Polycom SoundPoint IP 550	mardi.jackson@8x8.com
Edit |Replace Device	Active	Hot Desk Extension	1077	(210) 550-3870	Hot Desk	Demo	Polycom SoundPoint IP 550	bkorbe@8x8.com
Edit |Activate Device|	Pending	Unlimited Extension Pro	1099	(557) 327-4841	Pilot Lab 560	Bill Korbe	Polycom Soundpoint IP 560	bkorbe@8x8.com

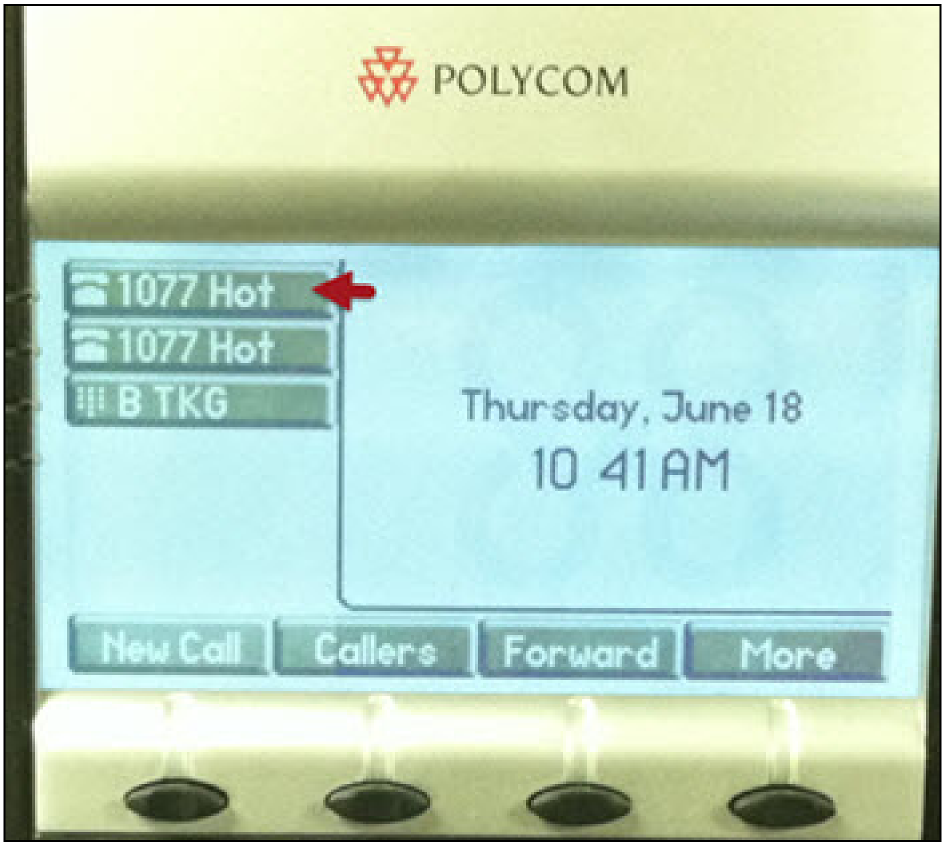
4. Enter or update the caller ID first name and last name.
5. Verify the emergency address.

6. Click **Edit** next to **Emergency Service Address** to change the address.



7. Click **Save Changes**.

   The extension appears as a Hot Desk extension on the phone (in this case, 1077 Hot).



Disaster Recovery Companion Service

8x8 Disaster Recovery Companion Service provides continuity if the data center hosting your primary 8x8 Virtual Contact Center suffers a disaster or site failure.

8x8 Virtual Contact Center Disaster Recovery Companion Tenant is a scheduled replica of your primary Virtual Contact Center tenant in the standby mode. This instance of your Virtual Contact Center tenant is hosted in a geographically diverse data center. It enables continuity for the contact center telephony traffic in the event of a site failure or natural disaster where your Virtual Contact Center cannot be accessed.

On-demand administration is available using the 8x8 Account Manager application, whether you just want more flexibility in everyday call routing, or plan for business continuity. You can divert your contact center inbound telephony traffic to your companion tenant or alternate phone numbers.

Features

- Ability to maintain business telephony continuity
- Provides geographically-diverse data center for the Companion tenant
- Ability to define and validate rerouting plans in advance
- Ability to quickly switch and self-manage routing plans
- Ability to archive routing plans
- Ability to access and restore a historical version of a routing plan

Rerouting Options

The following built-in rerouting options in Virtual Contact Center help you maintain business continuity:

- **Disaster Recovery (DR) Tenant**: Subscribe to Disaster Recovery Companion Service, which provides access to a secondary tenant.

> **Note:** The Companion Disaster Recovery Tenant is an add-on service that can be purchased separately. It requires prior configuration.

- **Forward Calls**: Route your contact center inbound calls to an alternate phone number such as a phone queue or workplace.

Rerouting Plans

Virtual Contact Center facilitates channel or agent rerouting using routing plans. A routing plan determines how your contact center traffic is channeled. During normal operation, you can route traffic to the primary tenant. During a disaster, you can redirect the traffic to a DR tenant or forward them to another phone number. By default, all routing plans are set to direct inbound traffic to the primary tenant.

Virtual Contact Center allows you to define:

- **Normal Routing Plan**: Determine call routing during normal business operation.
- **Disaster Routing Plan**: Determine call routing during a disaster event.
- **Alternate Routing Plan**: Allows to test the set up in Voice Services Channel Rerouting, validate selected routing options, and copy the validated plan to the Normal or Disaster routing plan.

Plan for a Disaster Recovery Event

An exclusive test phone number is provided with every DR tenant. At a minimum, you should use this test number as well as other designated channel numbers monthly. 8x8 strongly recommends, and most industry guidelines require, conducting a full DR failover test at least once a year.

As contact center managers , you must set up a disaster event contingency plan for the contact center, test the plan ahead of time so you can activate it instantly when you need it. The plan should identify the VCC channel numbers to be rerouted to the companion tenant or to the alternate phone numbers, as needed. With the plan in place and with a few clicks in 8x8 Account Manager, your contact center traffic is automatically rerouted without the need to contact 8x8 Support.

Set up Voice Channel Rerouting

Before you activate a routing plan, we recommend testing out the plan. You can use the alternate routing plan to test if a routing plan works as intended without disturbing the settings in the other two plans. With a routing plan, you can be assured your disaster recovery plan is ready for activation when you need it.

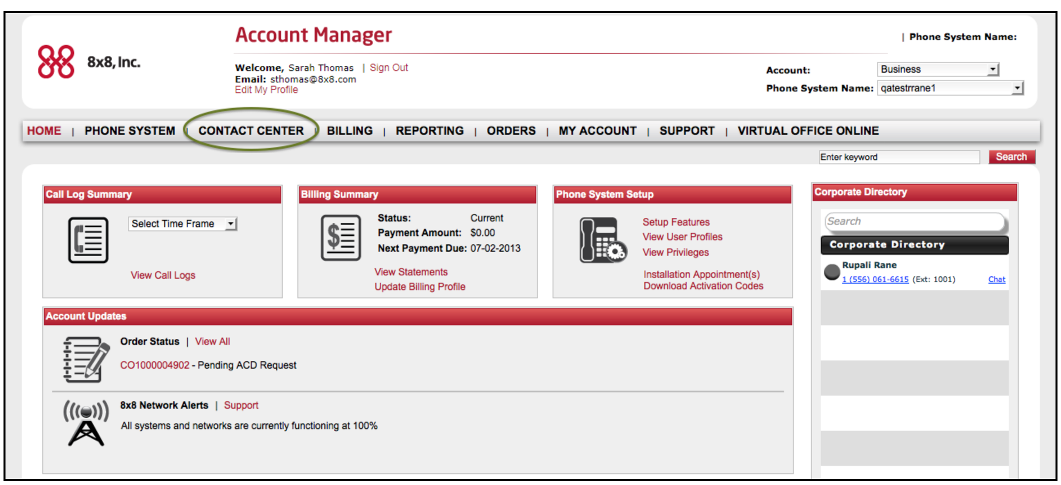
The following features give you the ability to reroute the inbound traffic to your contact center:

- **Voice Services Channel Rerouting**: Allows you to divert the contact center's inbound telephony traffic to the companion tenant or alternate phone numbers. This feature is available to both VO-VCC and Virtual Contact Center users with dedicated public numbers.
- **VCC Agent Login and Direct Dial Rerouting**: Allows you to divert calls for agents with private channel numbers to the companion tenant or an alternate phone number in case of emergency. During a disaster event, the agents log in to their application URL like before, but the system diverts them to the disaster recovery site as configured by the Account Manager administrator prior to the disaster. This feature is only available to VO-VCC users.

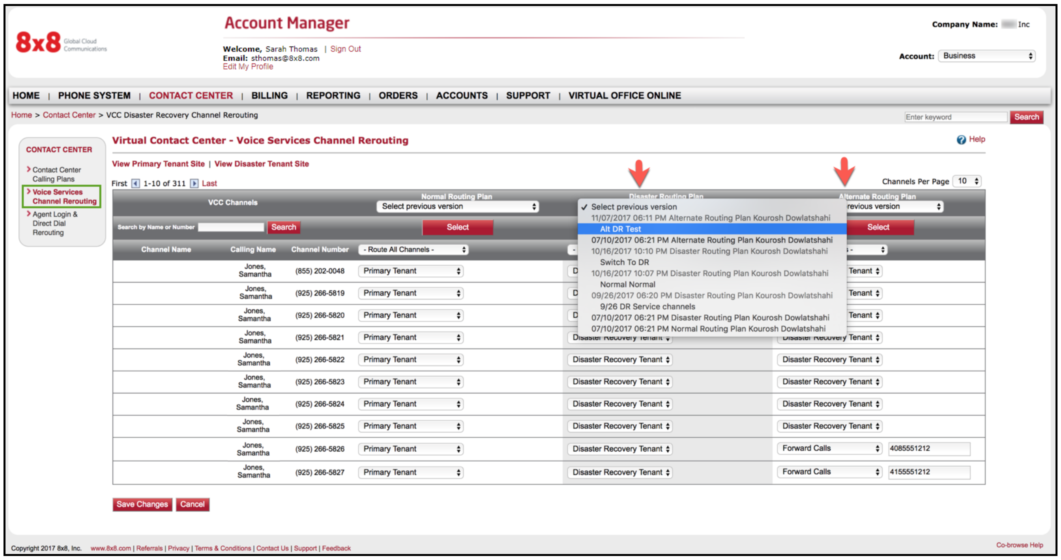
We recommend the following workflow for setting up Channel and VCC Agent Login and Direct Dial Rerouting:

Step 1: Create an Alternate Routing Plan

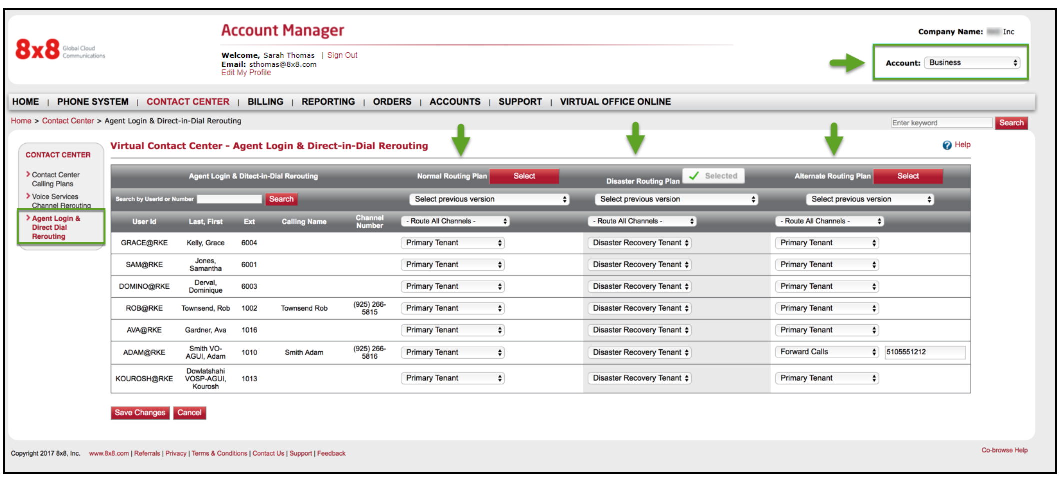
1. Log in to Account Manager by going to http://login.8x8.com from your preferred browser.
2. Click **Contact Center** in the top navigation bar.



3. From the **Contact Center** menu, select one of the following:
   - **Voice Services Channel Rerouting**: View and set up the Virtual Contact Center channel routing plans.



   - **VCC Agent Login and Direct Dial Rerouting**: View and set up agent login and routing plans.



The following table shows the fields and options available in Virtual Contact Center:

Field	Description
User ID	The agent user ID that is used to log in to Agent Console.
Last, First	The last and first name used for the account.

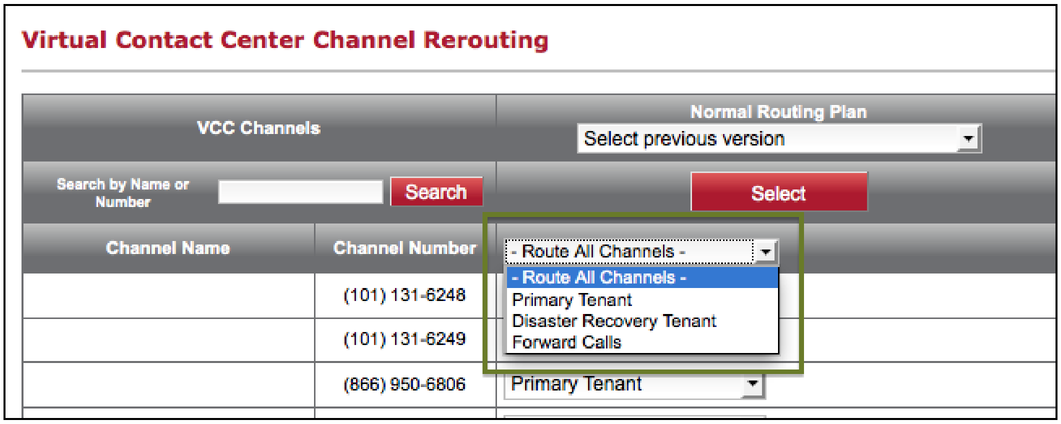
Field	Description
Ext	The dedicated or virtual extension number assigned to the agent.
Calling Name	Name displayed on PSTN calls, which contains the first 15 characters from the agent's first and last name.
Channel Name	The name of the channel that you are planning to reroute.
Channel Number	The telephone number of the channel that receives the incoming calls.
VCC Channels	All Virtual Contact Center channels are listed. You can select all channels or only the ones you like to reroute.
Route all Channels	If selected, the system reroutes all Virtual Contact Center channels.
Primary Tenant	Forwards all traffic to the channels that come to the primary tenant.
Forward Calls	Forwards inbound traffic to a specified phone number.
Normal Routing Plan	Indicates the plan for call routing during normal business operation.
Alternate Routing Plan	Allows you to test the set up channel rerouting, validate routing options, and copy the validated plan to the normal or disaster plan.
Disaster Routing Plan	Indicates the plan for call routing during a disaster.

4. Select a channel and specify a routing option under **Alternate Routing Plan** from the available choices:
   - **Primary Tenant**: forwards all traffic to the channels in the primary tenant.
   - **Disaster Recovery Tenant**: forwards all traffic to the dedicated DR tenant.

     Note: DR Tenant is limited to tenants with the 8x8 Disaster Recovery Service.

   - **Forward Calls**: forwards inbound traffic to a specified phone number. Enter a valid phone number.

5. Alternately, you can route all channels to the same destination by selecting an option from the **Route All Channels** drop-down menu.

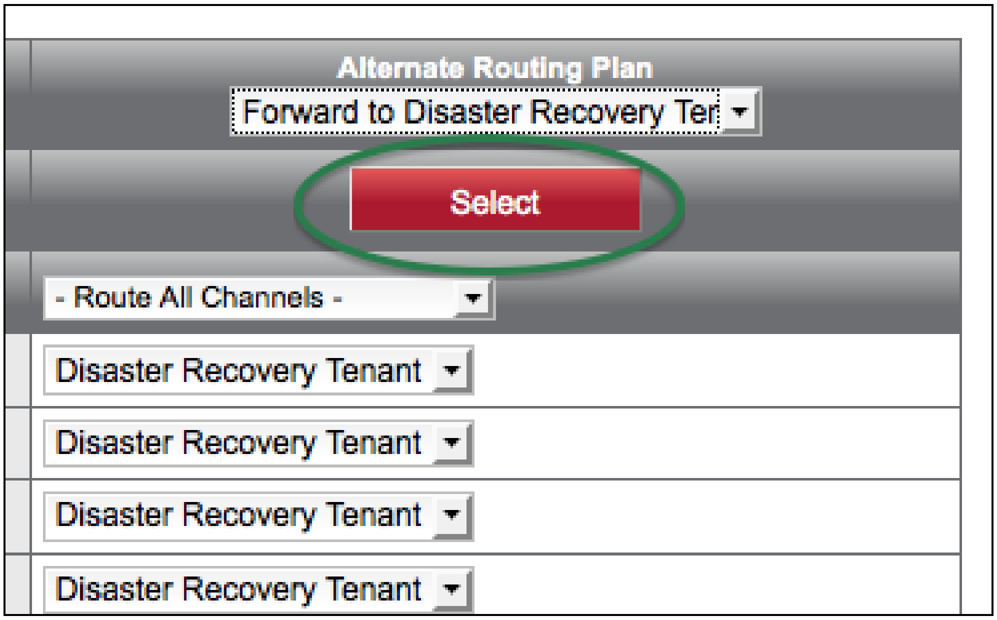


6. Click **Save Changes**. You are prompted to save with comments.
7. Enter a brief note to indicate the changes you made.
   Saving takes a snapshot of the settings in the **Alternate Routing Plan** column.

Step 2: Activate the Alternate Routing Plan

Changes to your routing plan take effect upon activating the plan. To activate a routing plan, click **Select** under a plan. The call redirection takes effect immediately. The ability to automatically store and retrieve previous versions of plans provides the flexibility to revert to a previous plan any time.

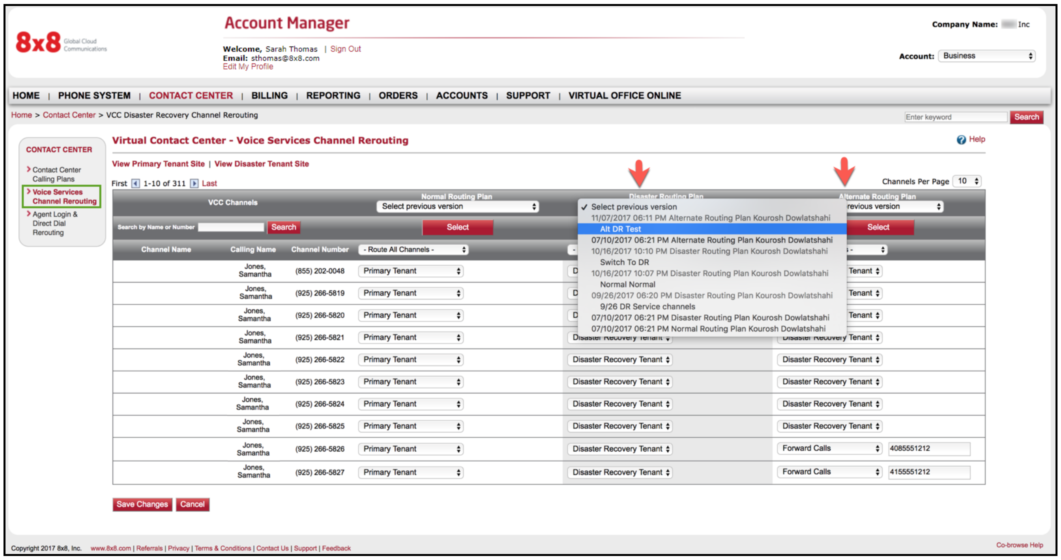
1. Click **Select** to activate the alternate routing plan.



2. Test if the calls are routed as intended.
3. When the selected plan operates successfully, you are now ready to copy the plan to the **Normal Routing Plan** or the **Disaster Routing Plan**.

Step 3: Copy the Tested Plan

1. From the drop-down menu under Disaster Routing Plan or Normal Routing Plan, select the **Alternate Routing Plan** you just validated.



2. Refer to the comments to make sure you are copying the right version.
3. The copy action highlights the channels with changed settings.

Note: You can access up to five previously-saved versions of a routing plan. You have the flexibility to revert to these plans, should the need arise.

4. Click **Save Changes**.

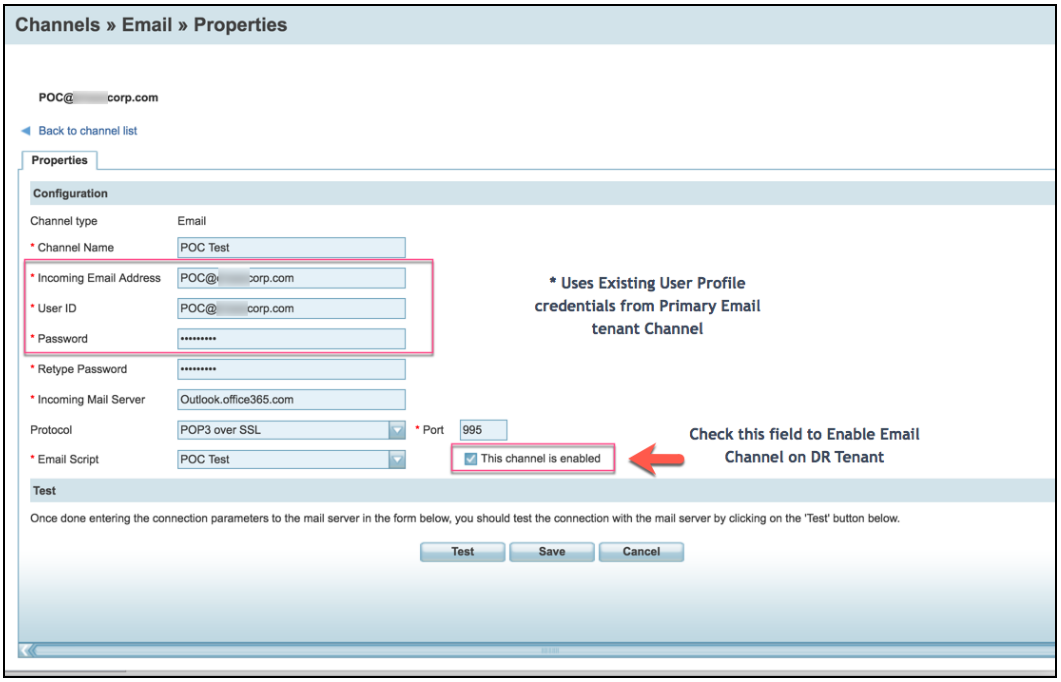
Note: When you save changes to a routing plan, a snapshot of the plan is saved as a new version for that plan. You can access up to five previously-saved versions for each plan. Saving changes across all three plans provides a separate version for each plan. Each of these versions reflects a snapshot of the plan itself. This way, you can copy the settings from a column by selecting the desired version specific to the plan.

Configure Email and Chat Channels During a Disaster

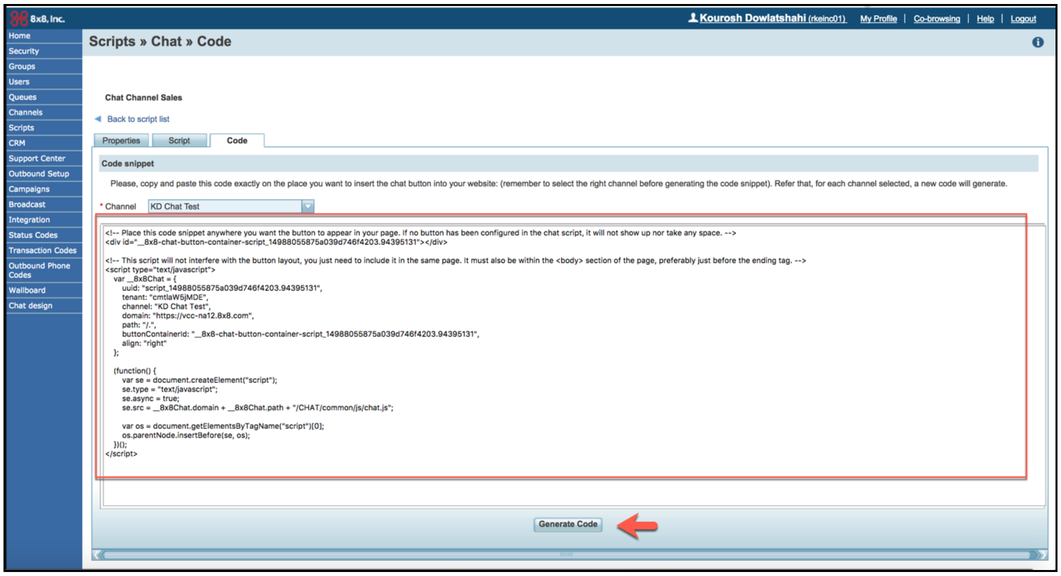
Virtual Contact Center Disaster Recovery Companion Service is intended to provide on-demand administration to manually re-direct your contact center voice traffic to your companion tenant or other phone numbers. If you are utilizing the Virtual Contact Center email and chat media channels, the following steps are required by your system administrators.

- **Email Channel:** As part of tenant synchronization process email channels can be synchronized to the companion tenant. The email channel on DR tenant needs to be activated to retrieve emails from the email server. Same mail server credentials as the primary tenant are put in place. Just enable the channel.

  Email channel on primary tenant needs to be stopped from retrieving emails, assuming the tenant is still accessible. Otherwise, in DR emergency where the primary tenant is not accessible, no action is required.



- **Chat channel:** The Code snippet generated by the primary tenant which is being used on your web page offering chat service needs to be updated with snippet generated from the Companion (DR) tenant.



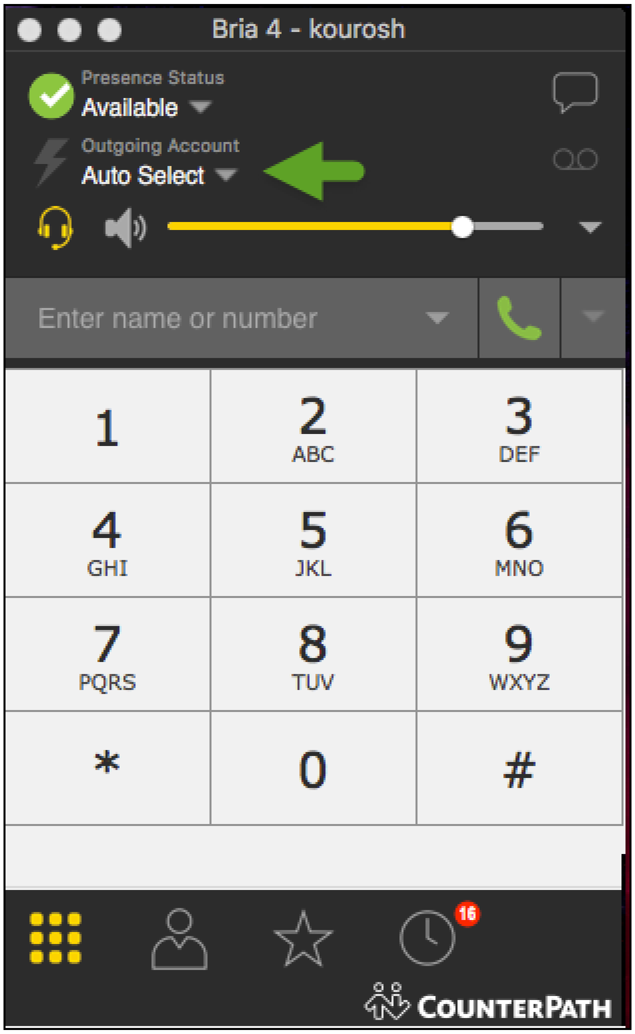
Note: You cannot predict when or where disaster will strike. You must manually redirect your voice traffic to your 8x8 DR tenant as your service does not automatically failover.

If you use 8x8 carrier services, quickly redirect your inbound voice traffic by using the Channel Rerouting tool in the 8x8 online Account Manager.

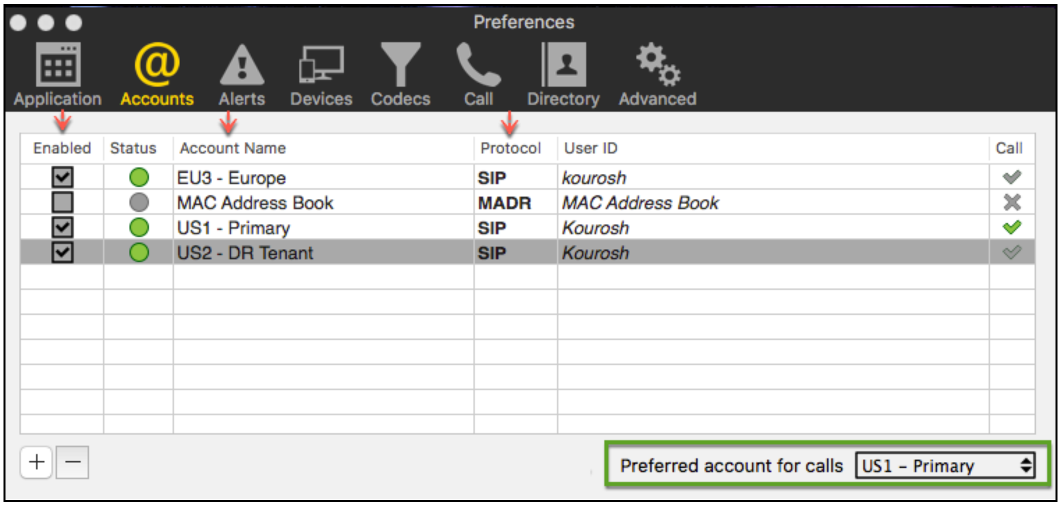
If you do not use 8x8 as your carrier, we work with you during your DR planning to identify the steps your carrier requires for manually redirecting your calls.

Configure Bria Softphone for Disaster Recovery

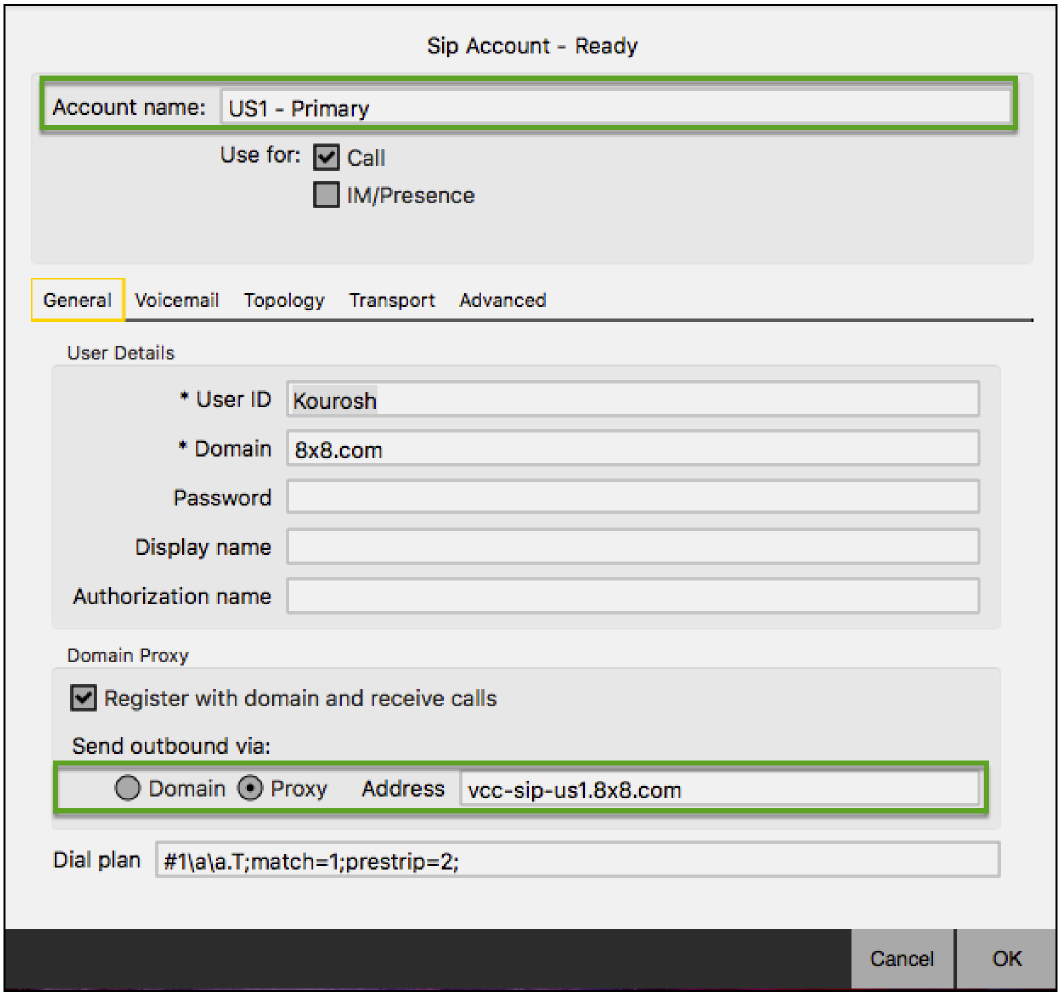
If your agents use Bria softphone, you must create and enable two Bria accounts (one for each proxy address): the primary tenant proxy address and DR companion tenant proxy address. Select **Auto Select** from the drop-down.



Add your primary and disaster recovery accounts in Bria and enable them.



The following example displays the details of sip account settings. The proxy address for the primary tenant is vcc-sip-us1.8x8.com and the proxy address for the DR tenant is vcc-sip-us2.8x8.com.



For more details on how to configure Bria, refer to Bria for Windows and Bria for MAC guides.

Manage Billing

Access to 8x8 service bills online through Account Manager saves your time to get on the phone for billing-related queries. You can view current and past billing statements, set up a billing profile for automatic payment, and download a summary of all accounts. Additionally, if you are an enterprise user, you can set your billing preferences to receive single or multiple bills, and manage billing accounts through cost centers.

For details on billing for different types of users, refer to:

- Small and Medium Business (SMB) Users
- Enterprise Users

SMB Users

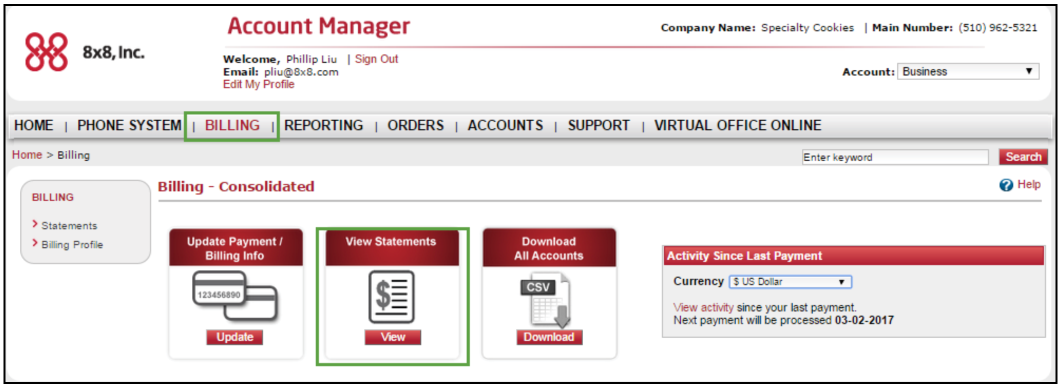
If you are a Small and Medium Business (SMB) user, you can set your billing profile for consolidated or unconsolidated billing, add a new credit account to your profile, and view statements. See the following sections for more information:

- Statements
- Billing Profile

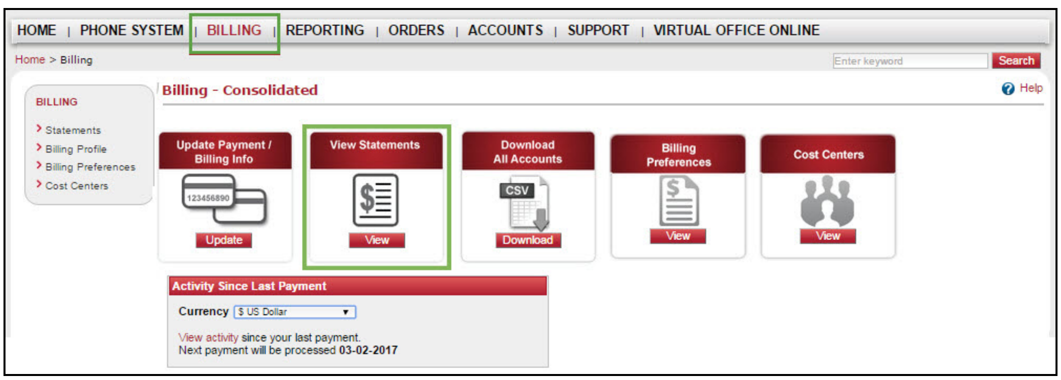
Statements

Using Account Manager, you can view your statements for the last 18 months.

1. Click **Billing** in the top navigation bar.
2. On **View Statements**, click **View**. There are two versions of the page:
   - SMB users see the following version of the Billing page.



   - Enterprise users see the following version of the Billing page including Billing Preferences and Cost Centers.

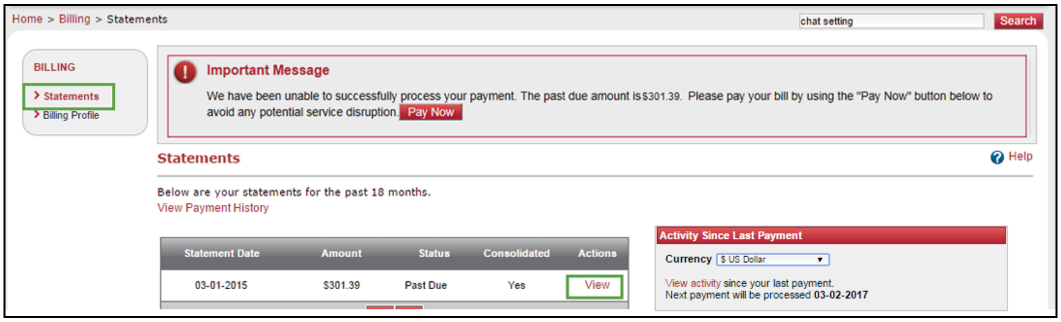


3. Select the **Currency** from the drop-down list under **Activity Since Last Payment**. Your selection determines the type of currency for your statement.

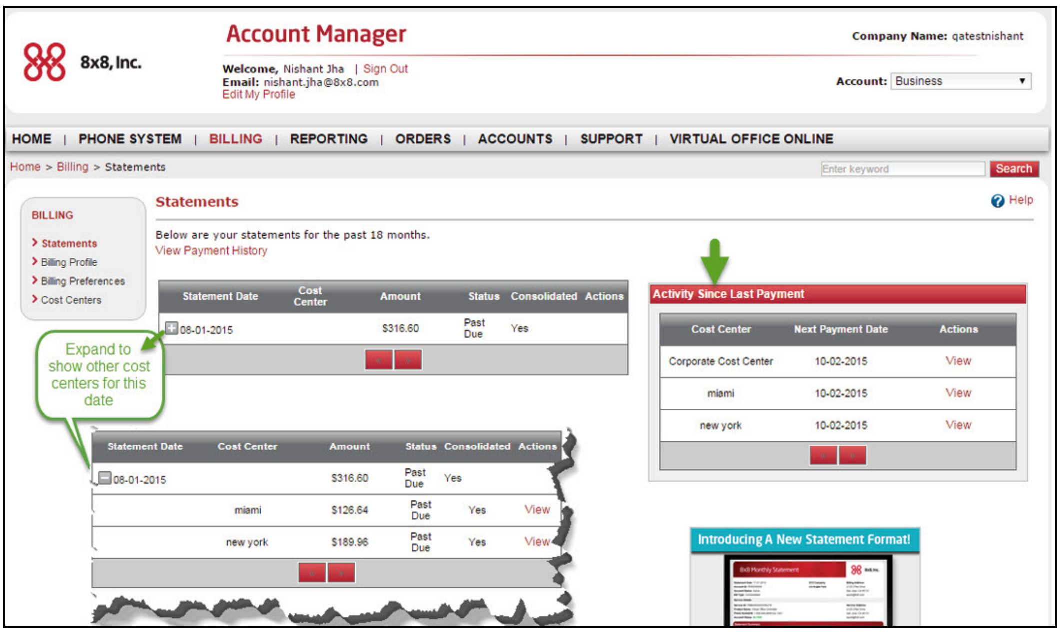
> **Note:** You can select from the following currencies: British Pound Sterling, Canadian Dollar, US Dollar, Australian Dollar, and Euro.

4. Click **View** under **Actions** of the statement you want to see. You can view bills one by one, or view several bills at once:

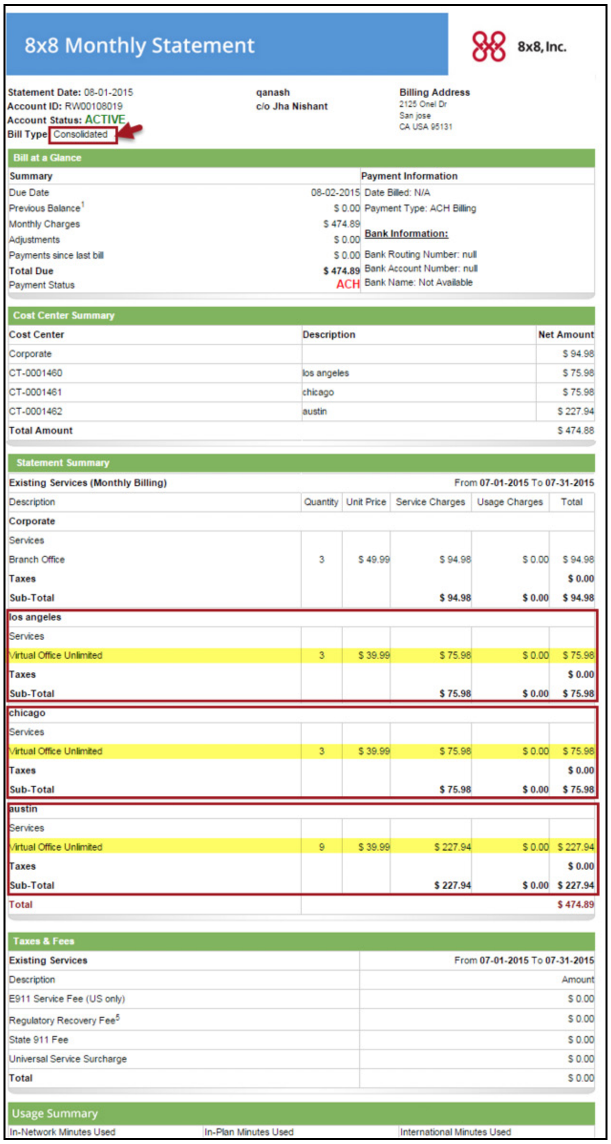
- The following is a statement for a single bill.



- The following is a statement for multiple bills.



5. A detailed billing summary displays. Below is an example of an enterprise consolidated statement with cost centers in Austin, Chicago, and Los Angeles in US dollars.



8x8 Monthly Statement

8x8, Inc.

Statement Date: 08-01-2015
Account ID: RW00108019
Account Status: ACTIVE
Bill Type Consolidated

qanash
c/o Jha Nishant

Billing Address
2125 Onel Dr
San jose
CA USA 95131

Bill at a Glance

Summary		Payment Information
Due Date	08-02-2015	Date Billed: N/A
Previous Balance[1]	$ 0.00	Payment Type: ACH Billing
Monthly Charges	$ 474.89	**Bank Information:**
Adjustments	$ 0.00	
Payments since last bill	$ 0.00	Bank Routing Number: null
Total Due	**$ 474.89**	Bank Account Number: null
Payment Status	ACH	Bank Name: Not Available

Cost Center Summary

Cost Center	Description	Net Amount
Corporate		$ 94.98
CT-0001460	los angeles	$ 75.98
CT-0001461	chicago	$ 75.98
CT-0001462	austin	$ 227.94
Total Amount		$ 474.88

Statement Summary

Existing Services (Monthly Billing) From **07-01-2015** To **07-31-2015**

Description	Quantity	Unit Price	Service Charges	Usage Charges	Total
Corporate					
Services					
Branch Office	3	$ 49.99	$ 94.98	$ 0.00	$ 94.98
Taxes					**$ 0.00**
Sub-Total			**$ 94.98**	**$ 0.00**	**$ 94.98**
los angeles					
Services					
Virtual Office Unlimited	3	$ 39.99	$ 75.98	$ 0.00	$ 75.98
Taxes					**$ 0.00**
Sub-Total			**$ 75.98**	**$ 0.00**	**$ 75.98**
chicago					
Services					
Virtual Office Unlimited	3	$ 39.99	$ 75.98	$ 0.00	$ 75.98
Taxes					**$ 0.00**
Sub-Total			**$ 75.98**	**$ 0.00**	**$ 75.98**
austin					
Services					
Virtual Office Unlimited	9	$ 39.99	$ 227.94	$ 0.00	$ 227.94
Taxes					**$ 0.00**
Sub-Total			**$ 227.94**	**$ 0.00**	**$ 227.94**
Total					**$ 474.89**

Taxes & Fees

Existing Services From **07-01-2015** To **07-31-2015**

Description	Amount
E911 Service Fee (US only)	$ 0.00
Regulatory Recovery Fee[5]	$ 0.00
State 911 Fee	$ 0.00
Universal Service Surcharge	$ 0.00
Total	$ 0.00

Usage Summary

In-Network Minutes Used	In-Plan Minutes Used	International Minutes Used

Usage Summary

In-Network Minutes Used	In-Plan Minutes Used	International Minutes Used
0	0	0

Statement Details - Services

Service ID/ Start Date	Service Plans	Telephone #/Ext.	[2] Monthly Service Charge: List Price	[7]Promo Discount	Adjusted Price	[3]Usage Charge	[4]Taxes & Fees	Total
New Services (18) From 07-01-2015 To 07-31-2015								
P8B000000196806 07-09-2015	Branch Office Days Billed: 19		$ 49.99	$ 0.00	$ 31.66	$ 0.00	$ 0.00	$ 31.66
P8B000000196807 07-09-2015	Branch Office Days Billed: 19		$ 49.99	$ 0.00	$ 31.66	$ 0.00	$ 0.00	$ 31.66
P8B000000196808 07-09-2015	Branch Office Days Billed: 19		$ 49.99	$ 0.00	$ 31.66	$ 0.00	$ 0.00	$ 31.66
Cost Center: austin Services [9]								View
P8B000000196782 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5829 Ext. 1007	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196783 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5830 Ext. 1008	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196784 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5831 Ext. 1009	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196785 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5832 Ext. 1010	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196786 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5833 Ext. 1011	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196787 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5834 Ext. 1012	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196788 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5835 Ext. 1013	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196789 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5836 Ext. 1014	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196790 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5837 Ext. 1015	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
		austin Sub Total	$ 359.91	$ 0.00	$ 227.94	$ 0.00	$ 0.00	$ 227.94
Cost Center: chicago Services [3]								View
P8B000000196779 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5826 Ext. 1004	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196780 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5827 Ext. 1005	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196781 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5828 Ext. 1006	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
		chicago Sub Total	$ 119.97	$ 0.00	$ 75.98	$ 0.00	$ 0.00	$ 75.98
Cost Center: los angeles Services [3]								View
P8B000000196776 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5823 Ext. 1001	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196777 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5824 Ext. 1002	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
P8B000000196778 07-09-2015	Virtual Office Unlimited Days Billed: 19	1-408-550-5825 Ext. 1003	$ 39.99	$ 0.00	$ 25.33	$ 0.00	$ 0.00	$ 25.33
		los angeles Sub Total	$ 119.97	$ 0.00	$ 75.98	$ 0.00	$ 0.00	$ 75.98
		Total	$ 749.82	$ 0.00	$ 474.89	$ 0.00	$ 0.00	$ 474.89

International Usage

Country	Usage(minutes)	Usage Charge
No international usage.		

Adjustments

Adjustment ID	Account Reference	Description	Requested Date	Process Date	Amount
No adjustments applied.					

Display Usage | Download Usage (CSV) | Download PDF Bill | Download Service Summary (CSV)

Additional Information:

[1] **Previous Balance** does not include invoice amounts for new service and equipment purchased in previous month. If you have ordered new service and equipment that is not paid at this time, please pay the original invoice you received at the time of sale.

[2] **Monthly Service Charges** apply to the period 08-01-2015 To 08-31-2015

[3] **Usage Charges** apply to the period 07-01-2015 To 07-31-2015

[4] **Taxes & Fees** - Taxes & Fees are based on Service Address. Includes government fees and taxes that we collect and are required by federal, state or local law to remit to the appropriate governmental entity (including, but not limited to, sales, use, excise, public utility, and E911). This section may also include certain fees and costs incurred by as a result of providing service, such as universal service fees (USF). We elect to collect them in order to recover or help defray the costs we incur. These fees, and what is included in the fees, may vary by locale and may change from time to time without notice.

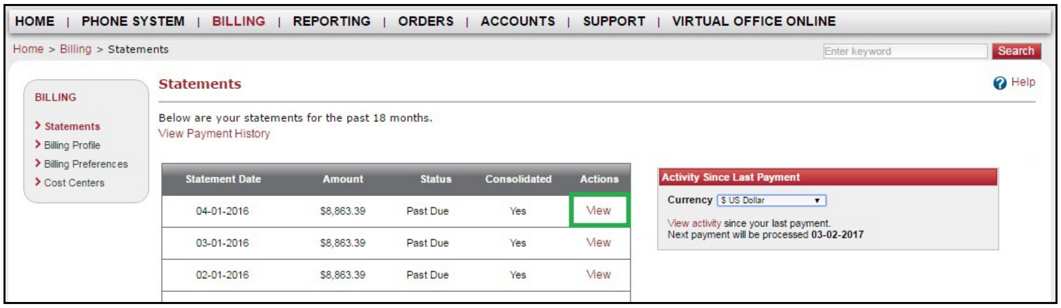
[5] **Regulatory Recovery Fee** - We collect and retain this fee to recover some of the costs we incur to comply with local, state and federal governmental mandates and programs, including, but not limited to, E911, local number portability and number pooling. We may impose the fee whether or not the benefits of any or all of these mandates and programs are available to you in your location.

[6] **This Month's Total** - Includes activity and charges for the time indicated. Does not include payments for prior balances.

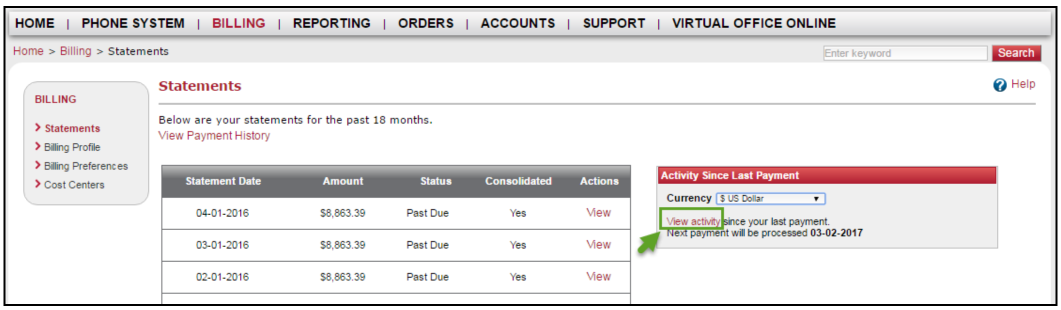
[7] **Promo Discount** - Limited time promotional offer.

Bill view is displayed @ 09-04-2015 03:17:49 PM (US Pacific Time)

6. To view billing details for a particular extension in **Billing > Statements**, click **View** next to the corresponding extension.



7. To see account activity since your last payment in **Billing > Statements**, click **View Activity**. A detailed billing summary opens.



Billing Profile

This feature allows you to select whether you receive a consolidated or unconsolidated bill for your telephone extensions and allows updates to your payment details.
8x8 offers two types of billing to meet your needs:

- **Unconsolidated Billing**: If you have chosen unconsolidated billing, you receive multiple bills per billing cycle, one for each of your 8x8 services. The selected credit card is charged for each service independently.
- **Consolidated Billing**: If you have chosen consolidated billing, you get one monthly bill for all your 8x8 services, and your credit card is charged once for the entire amount owed 8x8.

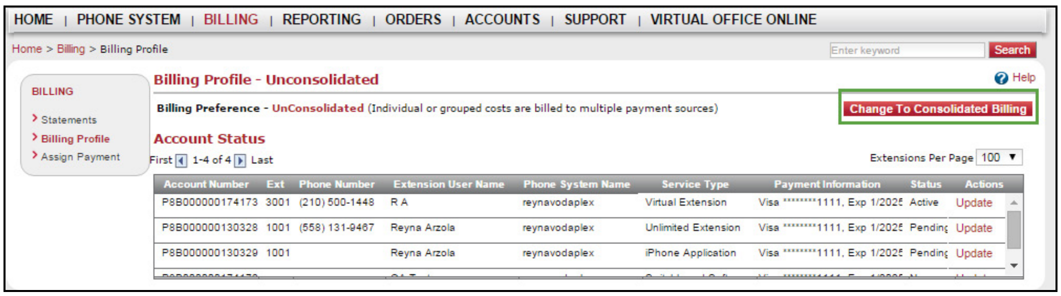
Billing Profile can be accessed by both SMB and Enterprise users:

- **SMB users**: If you are an SMB user, you can select unconsolidated or consolidated billing and switch between the two billing types as desired.
- **Enterprise users**: If you are an enterprise user, moving from unconsolidated billing to consolidated billing cannot be reversed. Please note that you must select consolidated billing to create cost centers.

Change Billing Type

In **Billing Profile**, SMB users can change their billing type from unconsolidated to consolidated. Enterprise users, however, can add or edit their payment options in **Billing Profile**. They can select their billing type by navigating to Billing Preferences. For details, refer to Billing Preferences.

1. Click **Billing** in the top navigation bar.
2. Under the **Billing** menu, click **Billing Profile**.
3. Click **Change to Consolidated**.

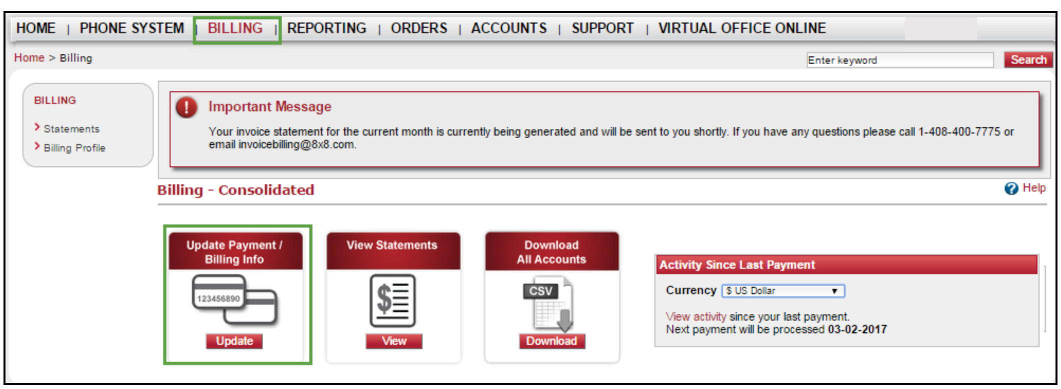


4. When the dialog box appears, select the payment method for consolidated payment from the drop-down menu.
5. Click **Save**.
6. When the confirming dialog box appears, click **Ok** to confirm the change.

Your billing is now consolidated under one credit card.

Update Payment and Billing Information

1. Click **Billing** in the top navigation bar.
2. Click **Update Payment/Billing Info**.

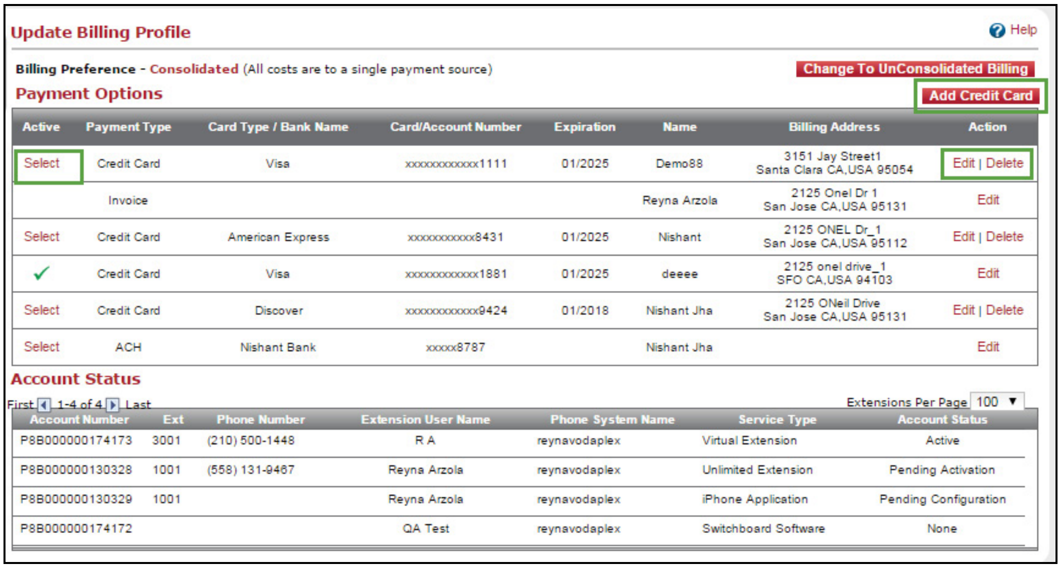


3. For consolidated SMB accounts, select another payment type from the list, and click **Select**.

4. Click **Delete** or **Edit**, if applicable.

> **Note:** At least one credit card must be active at all times.

5. If you are adding a new credit card, click **Add Credit Card**.



Update Billing Profile

Help

Billing Preference - Consolidated (All costs are to a single payment source)

Change To UnConsolidated Billing

Payment Options

Add Credit Card

Active	Payment Type	Card Type / Bank Name	Card/Account Number	Expiration	Name	Billing Address	Action
Select	Credit Card	Visa	xxxxxxxxxxxx1111	01/2025	Demo88	3151 Jay Street1 Santa Clara CA,USA 95054	Edit | Delete
	Invoice				Reyna Arzola	2125 Onel Dr 1 San Jose CA,USA 95131	Edit
Select	Credit Card	American Express	xxxxxxxxxxx8431	01/2025	Nishant	2125 ONEL Dr_1 San Jose CA,USA 95112	Edit | Delete
✓	Credit Card	Visa	xxxxxxxxxxxx1881	01/2025	deeee	2125 onel drive_1 SFO CA,USA 94103	Edit
Select	Credit Card	Discover	xxxxxxxxxxxx9424	01/2018	Nishant Jha	2125 ONeil Drive San Jose CA,USA 95131	Edit | Delete
Select	ACH	Nishant Bank	xxxxx8787		Nishant Jha		Edit

Account Status

First 1-4 of 4 Last

Extensions Per Page 100

Account Number	Ext	Phone Number	Extension User Name	Phone System Name	Service Type	Account Status
P8B000000174173	3001	(210) 500-1448	R A	reynavodaplex	Virtual Extension	Active
P8B000000130328	1001	(558) 131-9467	Reyna Arzola	reynavodaplex	Unlimited Extension	Pending Activation
P8B000000130329	1001		Reyna Arzola	reynavodaplex	iPhone Application	Pending Configuration
P8B000000174172			QA Test	reynavodaplex	Switchboard Software	None

6. Fill in the information for the new credit card.

Add Credit Card

Help

Please enter the new credit card information below. For billing addresses outside the U.S, UK and Canada, please call 8x8 Support (888) 898-8733.

Credit Card Information

Make Active?

Credit Card Type: Visa

Credit Card Number

CVV: What is this?

Expiration Date: 01 - January 2015

Name on Card

Billing Information USA

Country *: United States

Address Line1*

Address Line2

City*

State*

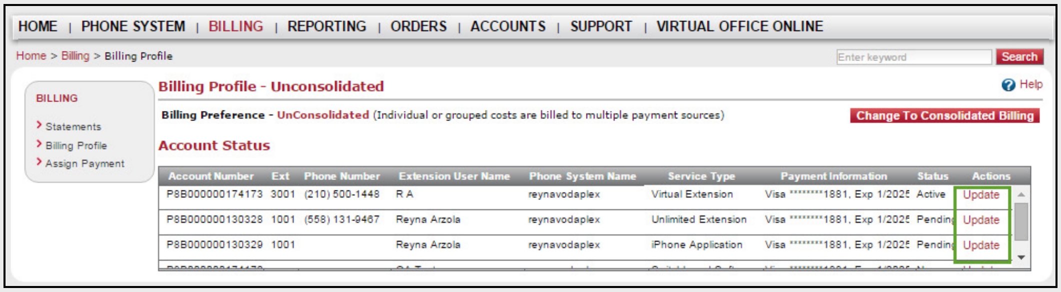
Zip Code*

Save Cancel

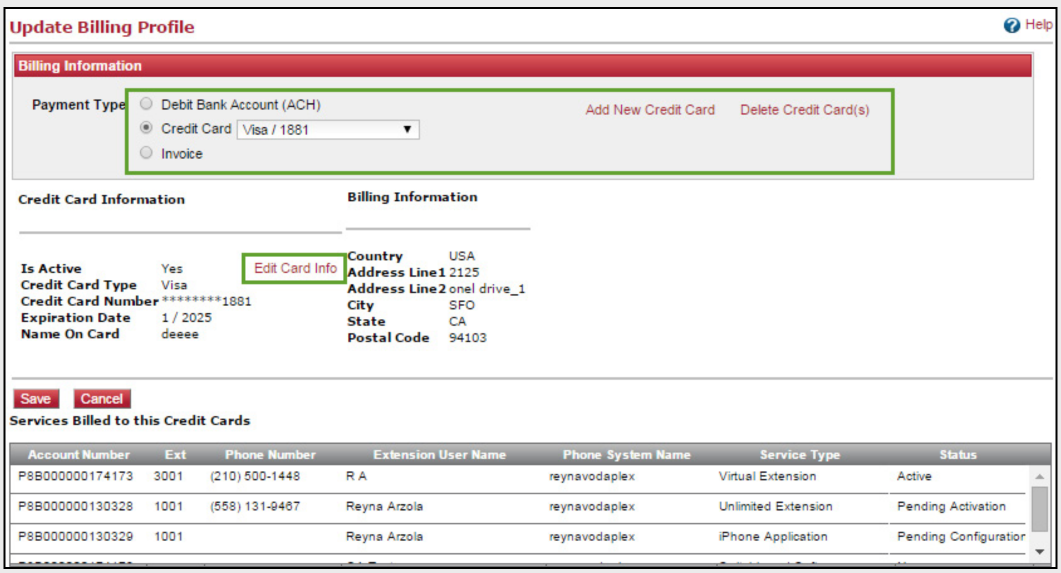
7. Click **Save**.

Notes:

-For unconsolidated SMB accounts, in **Update Payment Billing Info**, click **Update**.



-Select the payment type from the listed options. You can also add a new credit card or delete an existing one.



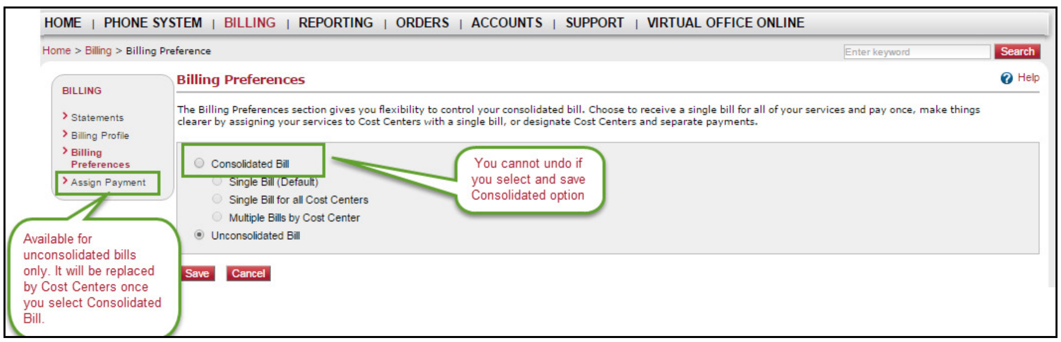
Enterprise Users

If you are an Enterprise user, you can set your billing profile to add a new credit card or ACH account, create cost centers, and set your billing preferences to receive single or multiple bills. For details, refer to:

- Statements
- Billing Profile
- Billing Preferences
- Cost Centers

Billing Preferences

Billing Preferences offer you the flexibility to control your billing needs for all your 8x8 services. The options vary based on your subscription type. You have the option to select **Consolidated Bill** under Billing Preferences. Once you select consolidated billing, you cannot go back to unconsolidated billing. You receive a warning message that this change cannot be undone.



Note: SMB customers do not see **Billing Preferences**.

Under consolidated billing, you can choose to receive a single bill for all of your services, or select multiple bills (one for each cost center) to break down the cost and service details by cost center. Cost Center is a feature for enterprise customers to customize their billing needs. For example, if your company PBX has two branches, such as San Jose and San Francisco, you may choose to have separate billing for each branch. Creating a cost center for each branch enables you to manage the separate billing needs.

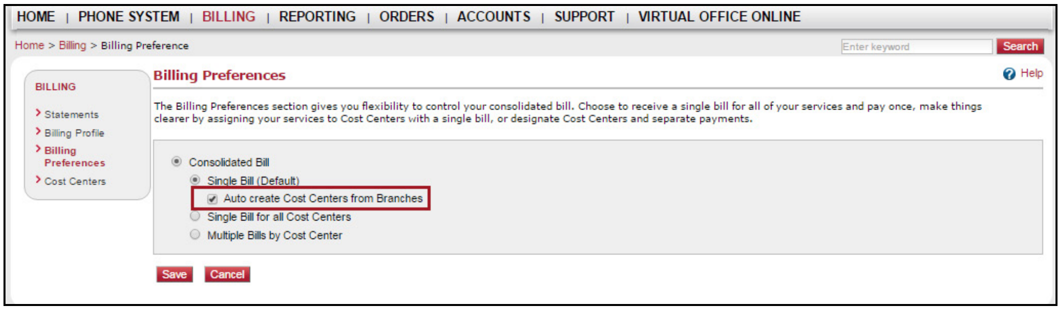
For details, refer to Cost Centers.

Set up Billing Preferences

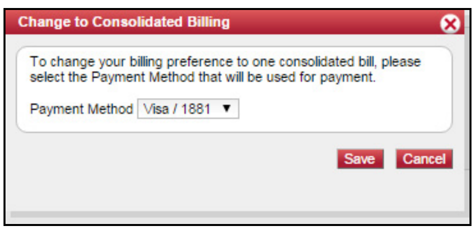
1. Click **Billing** in the top navigation bar.
2. Under the **Billing** menu, click **Billing Preferences**.
3. Enable **Single Bill (Default)** to see one bill for the cost center.
   OR
   Enable **Multiple Bills by Cost Center** to see multiple bills for each cost center.

If you have two branches, such as San Jose and San Francisco, you see two monthly bill statements for each billing cycle.

4. To create cost centers from PBX branches automatically, select the **Auto Create Cost Centers from Branches** check box.



5. Click **Save**.
6. Select your payment method.

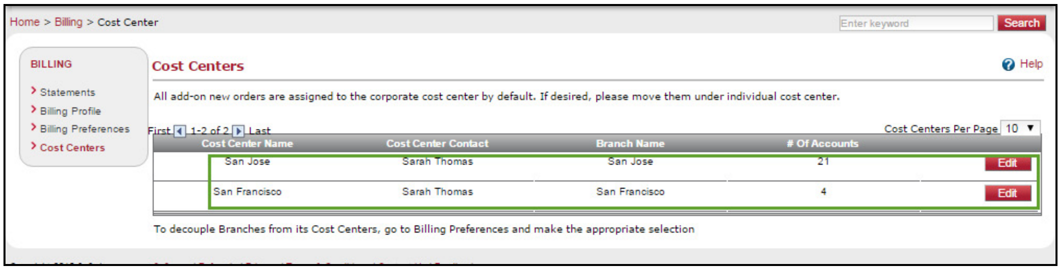


Note: Payment types can include invoice, ACH (checking), and credit card. If you want to keep invoicing, make sure retain your payment type selection to invoice. If you change it to ACH or credit card, you cannot move back to invoices.

7. Click **Save**.
8. Click **OK**.

   Click **Cost Centers** in the top navigation bar.

   You now see a list of cost centers for your existing branches.



Note: If you created cost centers manually for your branches and later decide to link the cost centers to branches, you must delete the existing cost centers and enable the option to automatically create cost centers from branches. Deleting cost centers does not affect your accounts.

Cost Centers

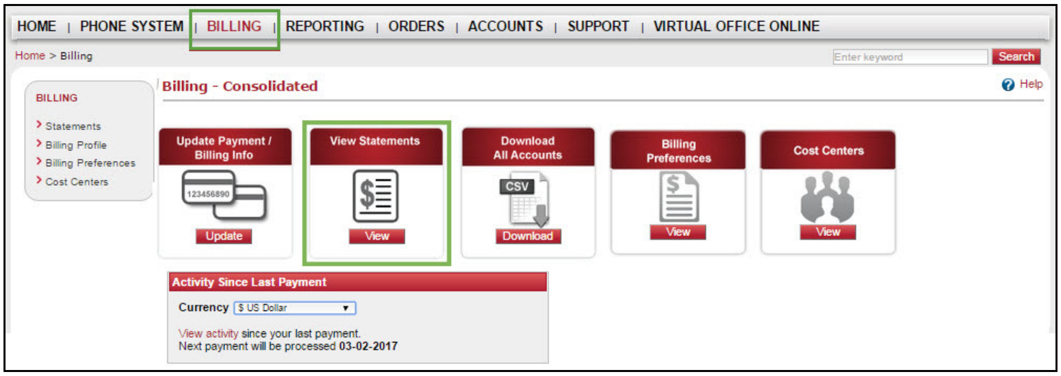
A cost center allows you to keep track of expenses for each department, branch, or location. For example, if your company has branches in multiple geographic locations, you can create a cost center for each branch and track the expenses individually. When you create a cost center manually, you must add accounts to the cost center. Each account is based on a service type. For services:

- Add-on services added to extensions associated with a branch are automatically reflected in the cost center.
- New services added to branches are automatically reflected in the cost center.

You can create cost centers manually, or automatically if you have branches. To access cost centers, go to **Billing > Cost Centers**.

Cost Center Prerequisite

The ability to create a cost center is available only to Enterprise customers who have set up consolidated billing. If you have unconsolidated billing and would like to manage billing through cost centers, you must change your billing preferences from **Unconsolidated** to **Consolidated** in **Billing > Statements**.

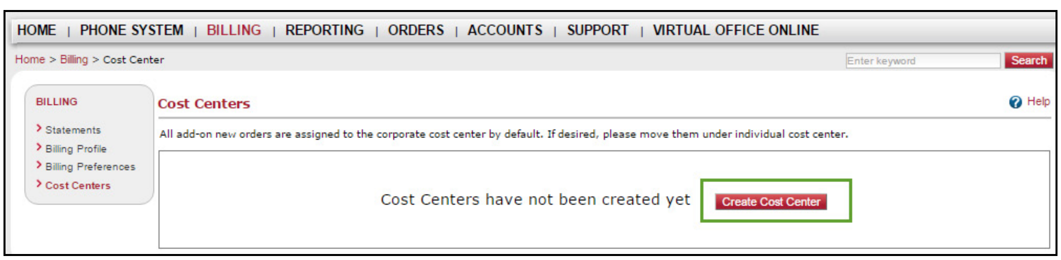


Create a Cost Center Manually

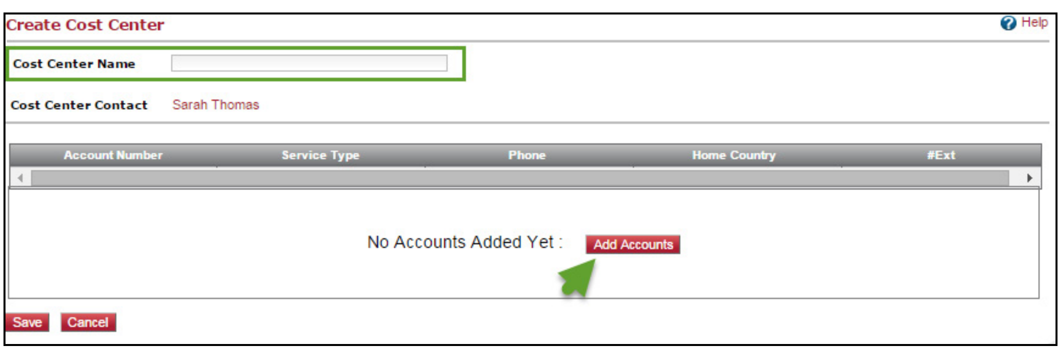
In the manual setup, define a cost center based on accounts but not mapped to branches. In this case, changes done to branches are not reflected in cost centers.

To create cost centers:

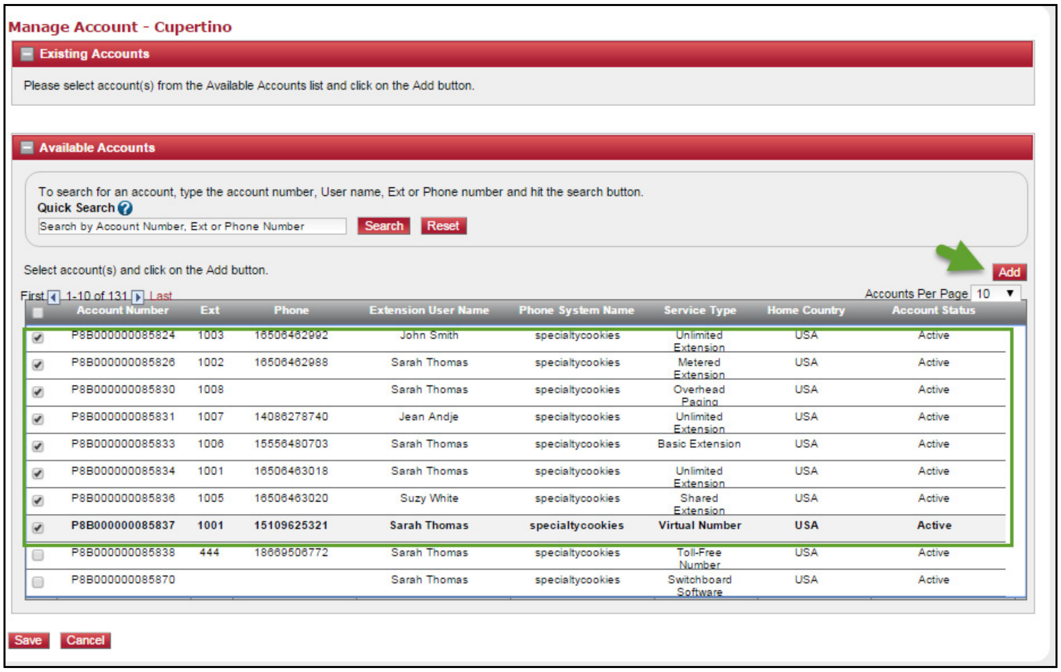
1. Click **Billing** in the top navigation bar.
2. Under the **Billing** menu, click **Cost Centers**.
3. Click **Create Cost Center**.



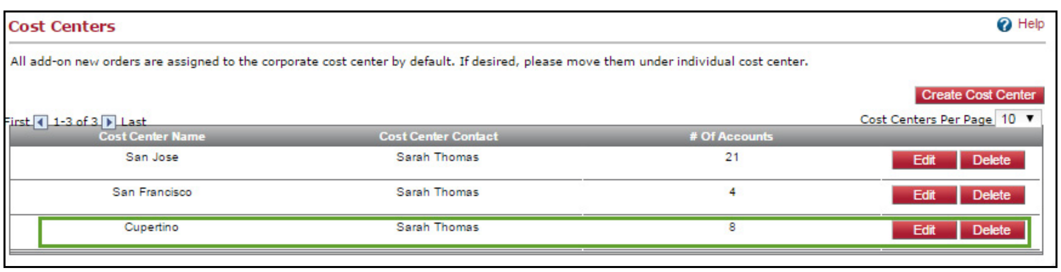
4. Enter a **Cost Center Name**, and click **Add Accounts**.



5. A list of available accounts appears. Select the ones you wish to add to your cost center. You must add at least one account. You can add or delete accounts to an existing cost center at any time.
   For details, refer to Manage Cost Center Accounts.
6. Click **Add**.



7. Click **Save**.
   The cost center is created and added to the list.
8. Click **Edit** to rename or manage the cost center accounts, or click **Delete** if you wish to remove the cost center.



Note: You do not have the privileges to delete cost centers created automatically from branches.

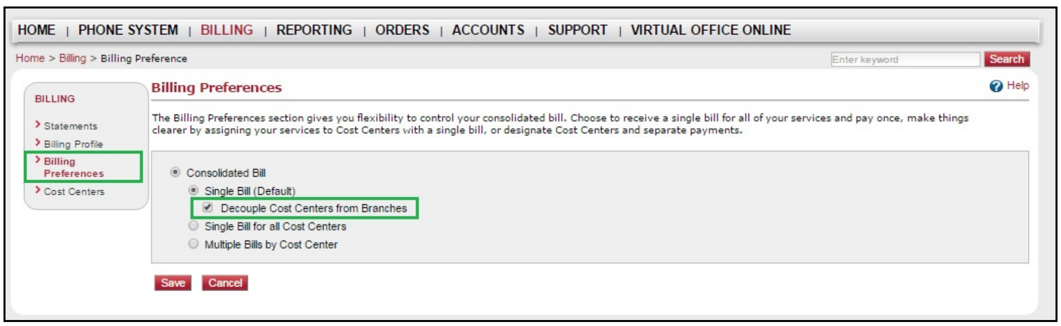
Create a Cost Center Automatically

If your company's PBX is segmented into branches and you wish to have cost centers for each branch, you can choose to create the cost centers automatically and set up the billing preferences to generate cost centers from branches automatically. The cost centers are mapped to branches, and are in sync with changes made to branches. All changes to the branch are automatically reflected in the cost center.

Decouple Cost Centers from Branches

If you wish to separate cost centers from branches, you can go back to **Billing Preferences**. Select the **Decouple Cost Centers from Branches** check box.

A message warns you that the change cannot be undone.



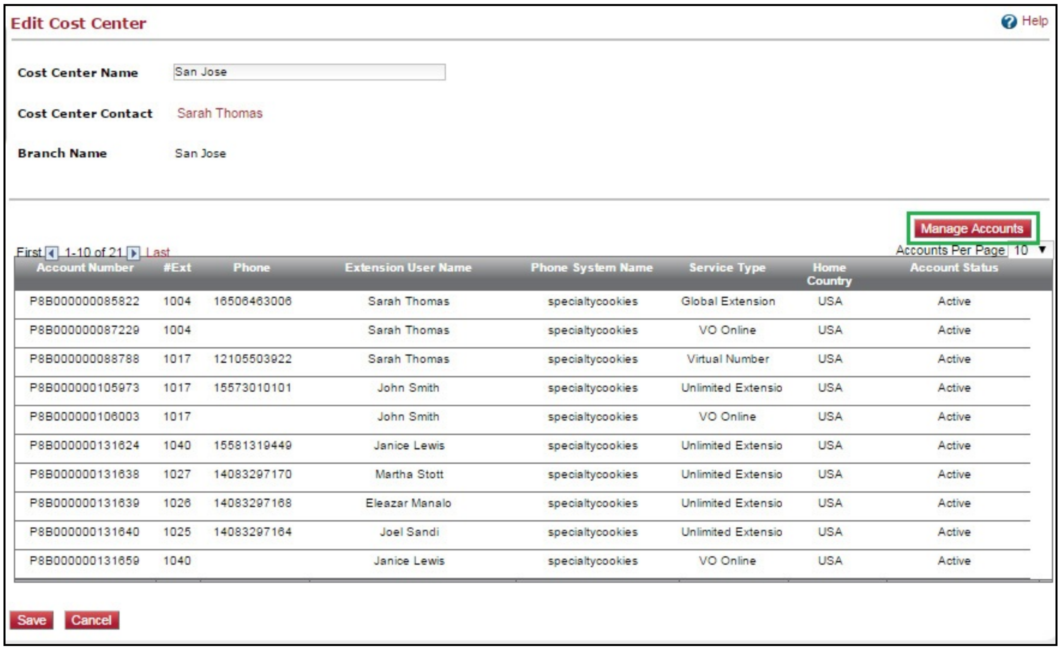
Manage Cost Center Accounts

When you create a cost center, you must add accounts to it. Each account is based on service types, such as Unlimited Extension, Service Extension (Ring Group, Call Queue, and Auto Attendant), the Virtual Office desktop app, or Virtual Extension. When you add new services to your PBX, the new accounts show up under **Corporate Cost Center** in your statement. To assign these accounts to the desired cost center, edit the cost center, and go to **Manage Accounts**.

To manage accounts:

1. Click **Billing** in the top navigation bar.
2. In the **Billing** menu, click **Cost Centers**.
3. Click **Edit** next to the cost center in the list.
   A list of accounts, extension numbers, and extension users appears.

4. Click **Manage Accounts**.



Edit Cost Center

Help

Cost Center Name: San Jose

Cost Center Contact: Sarah Thomas

Branch Name: San Jose

Manage Accounts

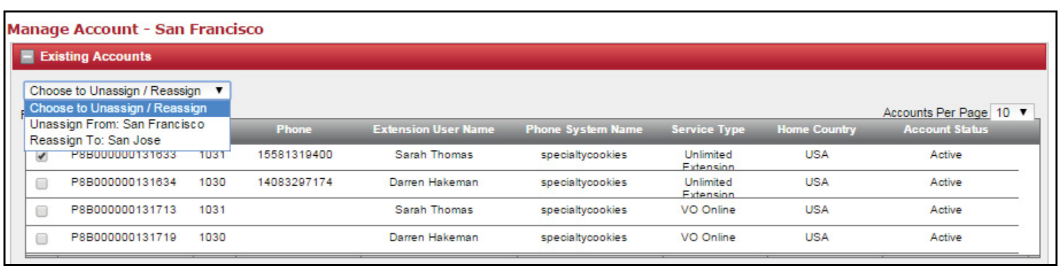
First 1-10 of 21 Last

Accounts Per Page 10

Account Number	#Ext	Phone	Extension User Name	Phone System Name	Service Type	Home Country	Account Status
P8B000000085822	1004	16506463006	Sarah Thomas	specialtycookies	Global Extension	USA	Active
P8B000000087229	1004		Sarah Thomas	specialtycookies	VO Online	USA	Active
P8B000000088788	1017	12105503922	Sarah Thomas	specialtycookies	Virtual Number	USA	Active
P8B000000105973	1017	15573010101	John Smith	specialtycookies	Unlimited Extensio	USA	Active
P8B000000106003	1017		John Smith	specialtycookies	VO Online	USA	Active
P8B000000131624	1040	15581319449	Janice Lewis	specialtycookies	Unlimited Extensio	USA	Active
P8B000000131638	1027	14083297170	Martha Stott	specialtycookies	Unlimited Extensio	USA	Active
P8B000000131639	1026	14083297168	Eleazar Manalo	specialtycookies	Unlimited Extensio	USA	Active
P8B000000131640	1025	14083297164	Joel Sandi	specialtycookies	Unlimited Extensio	USA	Active
P8B000000131659	1040		Janice Lewis	specialtycookies	VO Online	USA	Active

Save Cancel

5. Select a check box by an account under **Existing Accounts**.
   The **Choose to Assign / Reassign** option box appears under **Existing Accounts**.
6. Select an option from the drop-down list. You can choose to un-assign an account from its current branch and assign it to another.



Manage Account - San Francisco

Existing Accounts

Choose to Unassign / Reassign

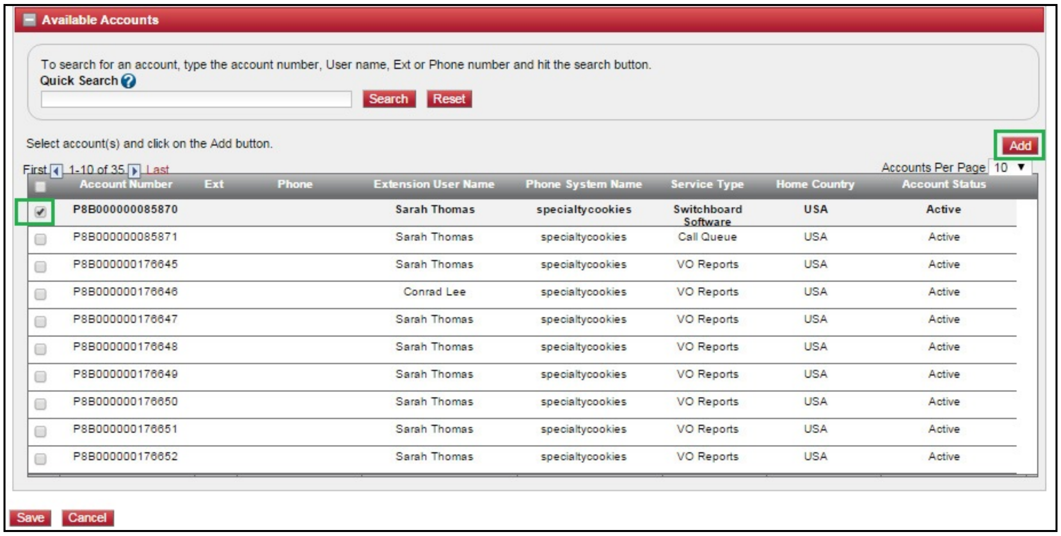
Choose to Unassign / Reassign
Unassign From: San Francisco
Reassign To: San Jose

Accounts Per Page 10

	Account Number	#Ext	Phone	Extension User Name	Phone System Name	Service Type	Home Country	Account Status
☑	P8B000000131633	1031	15581319400	Sarah Thomas	specialtycookies	Unlimited Extension	USA	Active
☐	P8B000000131634	1030	14083297174	Darren Hakeman	specialtycookies	Unlimited Extension	USA	Active
☐	P8B000000131713	1031		Sarah Thomas	specialtycookies	VO Online	USA	Active
☐	P8B000000131719	1030		Darren Hakeman	specialtycookies	VO Online	USA	Active

To add a new account to the selected cost center:

1. Select a check box by an account under **Available Accounts**.
2. Click **Add**.



The selected account is added to the existing accounts.

Relationship Between Branches and Cost Centers

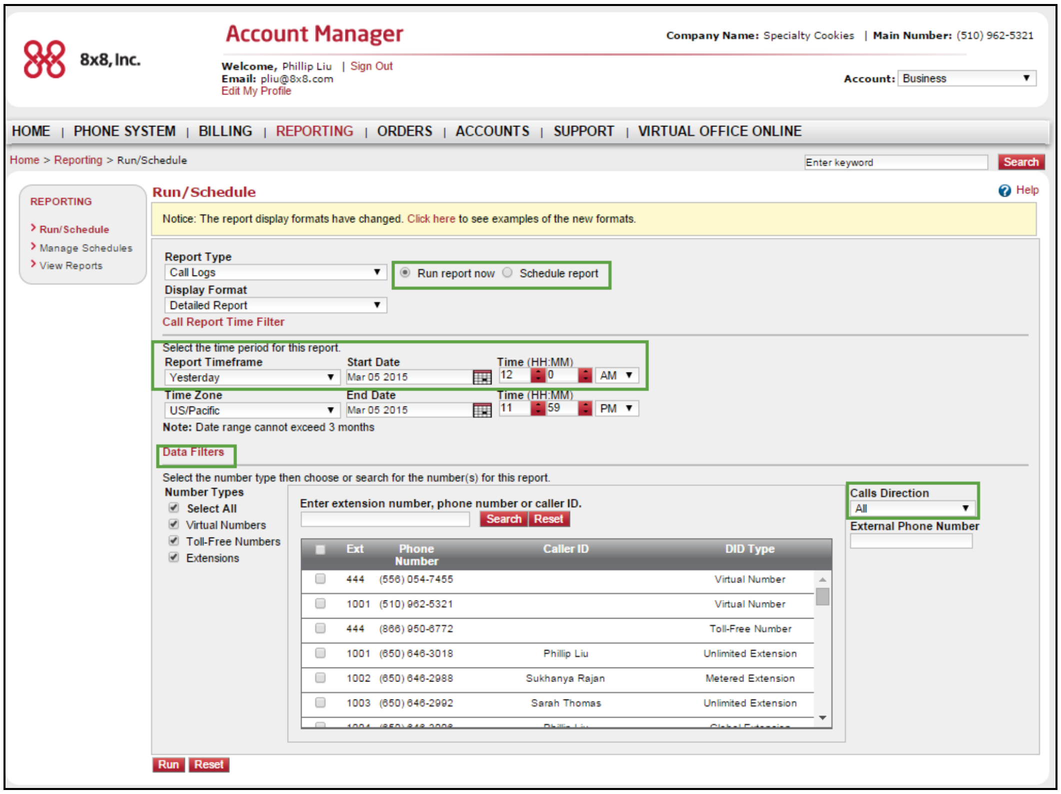
- All changes to branches are reflected in cost centers bound to the branch.
- All line items (service type accounts such as Virtual Office Analytics and Barge-Monitor-Whisper) that can be added to a cost center by managing accounts do not update the associated branch.

Manage Reporting

Using Account Manager, you can run and schedule call log reports that reflect activity on individual extensions, selected extensions, or all extensions.

Run or Schedule a Report

1. Click **Reporting** in the top navigation bar.
2. Set the **Report Type** and **Display Format** to select the type and organization of the activity reflected in the report.
3. Set the **Report Timeframe**. Data can be reported from the previous day, week, month, and more. You can also set a custom timeframe.



Note: The date range cannot exceed 3 months.

If you selected the **Custom** report timeframe, you can set:

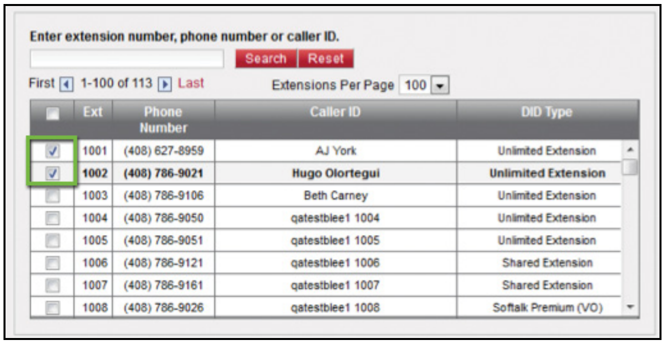
- **Start Date**
- **End Date**
- The **Time** for both dates

4. If necessary, set the **Time Zone**.
5. Select **Data Filters**:

    a. Choose **Number Types** to display in the extension box:

    - Select All
    - Extensions
    - Virtual Numbers
    - Toll-Free Numbers

b. Select the extensions you want to include in the report.



c. Select the **Calls Direction** to include in the report:

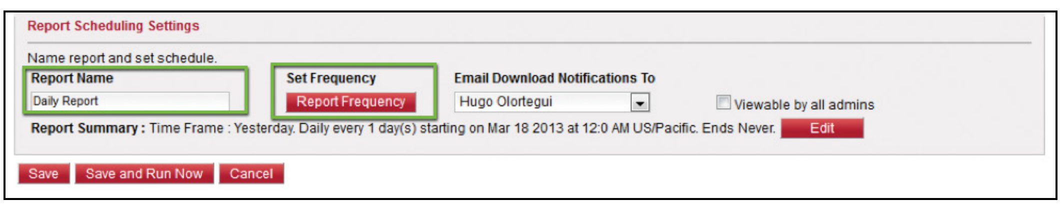
- All
- Inbound
- Outbound

d. To track calls made to or from your contact center that involve a specific external number, enter an optional **External Phone Number** to include in the report.

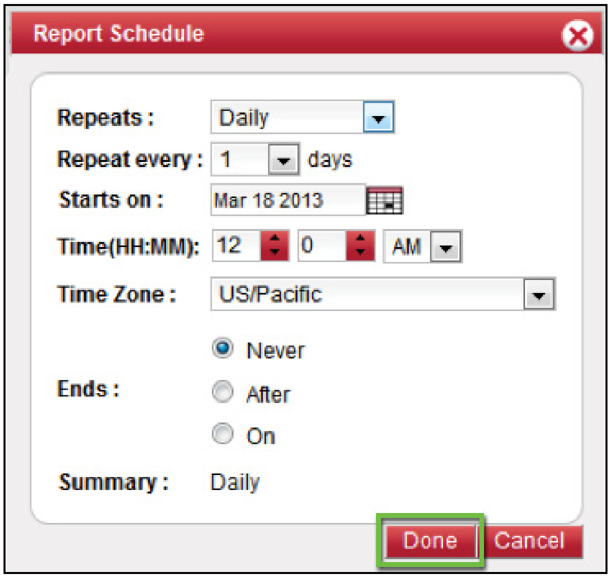
6. If you want to schedule a report instead of running one immediately, select **Schedule Report**. Under the **Report Scheduling Settings** section that appears:

a. Enter the **Report Name**.

b. Set the **Report Frequency**.



c. In the **Report Schedule** box that pops up, enter the necessary information. Reports can run at a future date, or on a daily, weekly, or monthly repeating schedule. Click **Done** when finished.



d. Under **Email Download Notifications To**, select the system administrator you would like to send an email notification to once the report is ready.

Note: Email notifications can only be sent to system administrators. To create new administrators for the reporting, go to **Accounts > Privileges**. Make sure to grant **Reporting** privileges.

e. To make the report available to all your phone system administrators with Reporting capabilities, select the **Viewable by all admins** check box.

7. If you selected **Run Report Now**, click **Run** to finish.
   OR
   If you selected **Schedule Report**, click:
   - **Save** to save a report without running it.
   - **Save and Run Now** to save a report and run it.

Manage Schedules

To edit scheduled reports, click **Manage Schedules** under the **Reporting** menu.

Find the report you want to manage, and choose from the following actions:

- Enable/Disable
- Edit
- Delete
- Run Now

View Reports

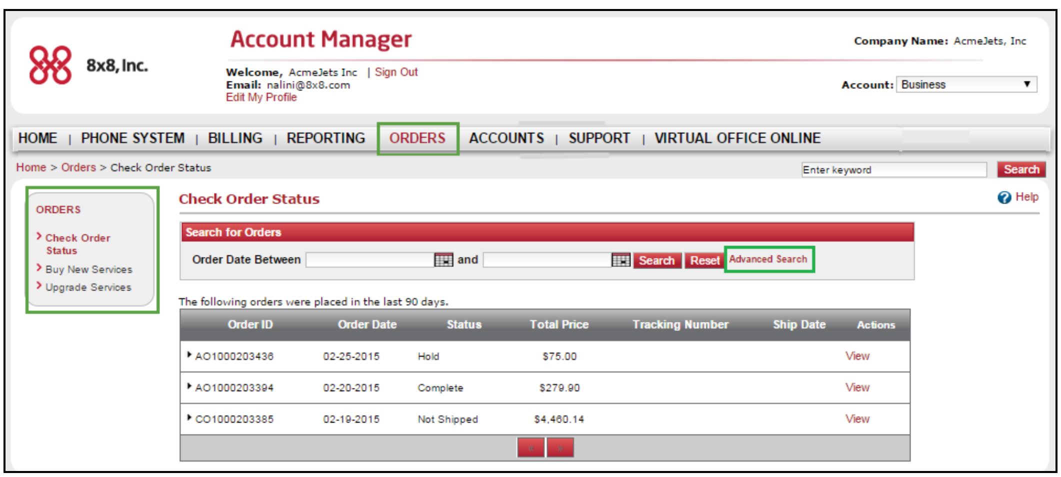
To view previously-generated reports, click **View Reports** under the **Reporting** menu.

Manage Orders

8x8 makes it easy to check your orders, buy new services, and upgrade existing services online using Account Manager.

Check Order Status

1. Click **Orders** in the top navigation bar.

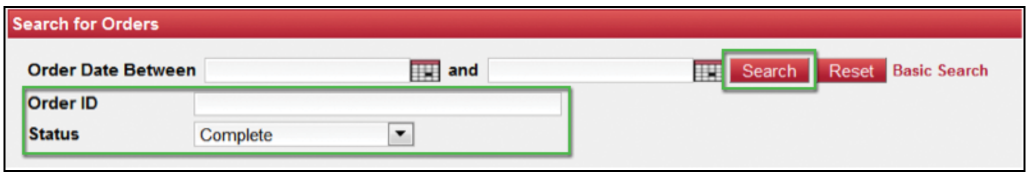


2. To search orders by date (basic search):
   a. Select a start date.
   b. Select an end date.

c. Click **Search**.

> **Note:** By default, all orders placed in the past 90 days are displayed on the **Orders** main page.

3. To search for orders by Order ID or Status (advanced search):
   a. Click **Advanced Search**.
   b. Enter the Order ID, or click the drop-down arrow to select an order status.
   c. Click **Search**.



4. Your search results are displayed. To see the invoice for a particular order, click **View**.

Order ID	Order Date	Status	Total Price	Tracking Number	Ship Date	Actions
SA10000542	09-20-2011	Not Shipped	$62.28			View
AO1000004074	09-06-2011	Complete	$75.00			View
AO1000004068	08-25-2011	Complete	$72.04			View
CO1000004064	08-25-2011	Complete	$79.98			View

Buy New Services

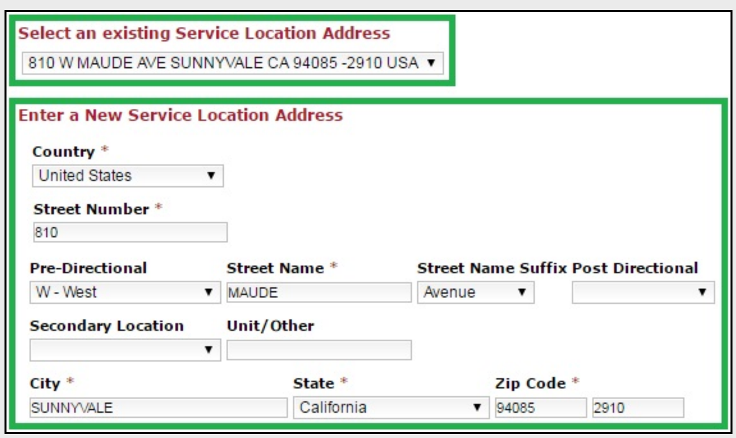
You can buy add-on services and equipment for existing service types.

1. Click **Orders** in the top navigation bar.
2. Under the **Orders** menu, click **Buy New Services**.

3. Select your **Service Type**.

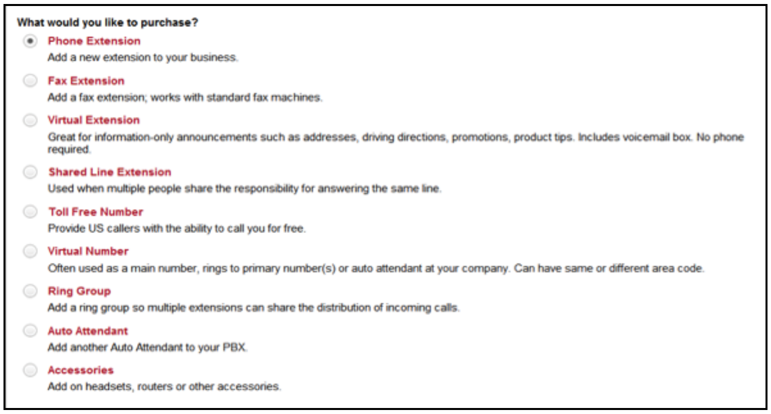
4. Click **Continue**.
5. Provide your service location address for E911 emergency service.
   a. To **Select an existing Service Location Address**, click the arrow for the drop-down list, and make your selection.
   b. To **Enter a New Service Location Address**, complete the required fields.

Note: Required fields are marked with *. You can only select one item at a time.



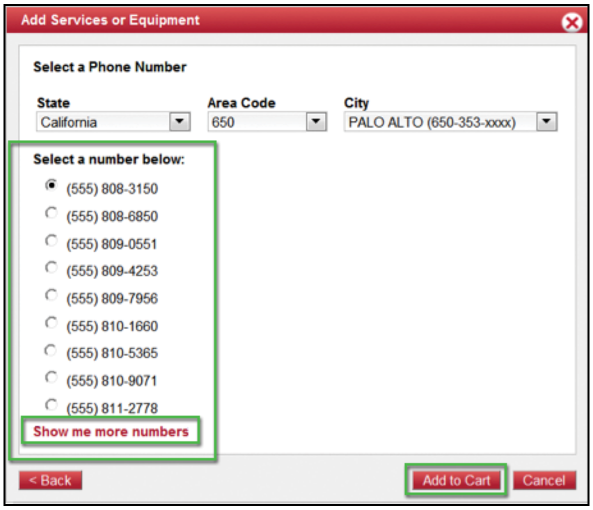
6. Click **Continue to Step 2**.

7. Click **Add Services or Equipment** to select the services you would like to purchase.



8. Select a plan or device to purchase.
9. Click **Next**.
10. If you are purchasing an extension, configure the extension by entering the user's:
    - Extension Number
    - Caller ID First Name
    - Caller ID Last Name
    - Email
11. Click **Next**.
12. Select an outside phone number for the extension by selecting the user's:
    - State
    - Area Code
    - City
13. Click **Add to Cart**.

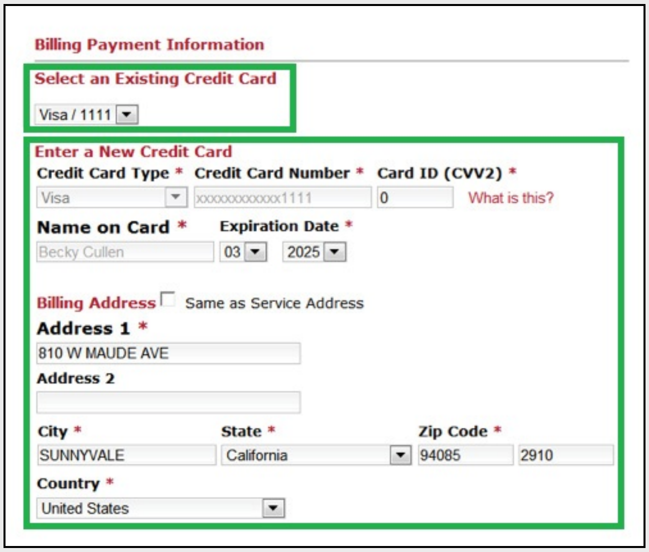
14. Select a phone number from the list presented. To see more numbers, click **Show me more numbers** at the bottom of the list.



15. Click **Add to Cart**.
16. To purchase additional services or equipment, click **Add More Services or Equipment** on the **Buy New Services** main page, and repeat the steps above.
17. Click **Continue**.

18. Enter your billing and shipping information.
    a. To **Select an Existing Credit Card** already on file, click the drop-down arrow, and make your selection.
    b. To **Enter a New Credit Card**, complete the required fields.

> **Note:** Required fields are marked with *.

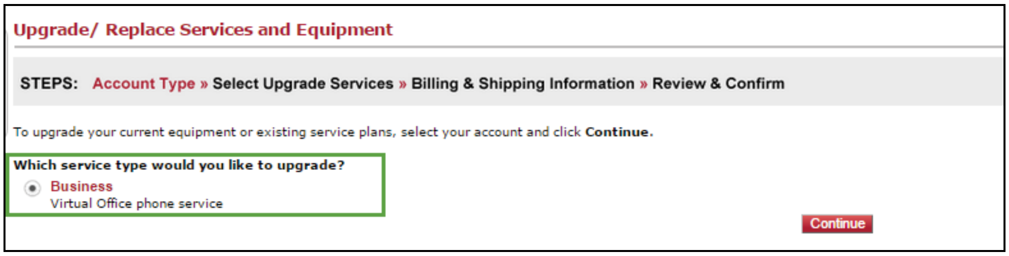


    c. Check the appropriate boxes if your billing address, service address, and/or shipping address are the same.
    d. To enter a new billing or shipping address, complete the required fields.
19. Click **Continue**.
20. Review and confirm your order.

Upgrade Services

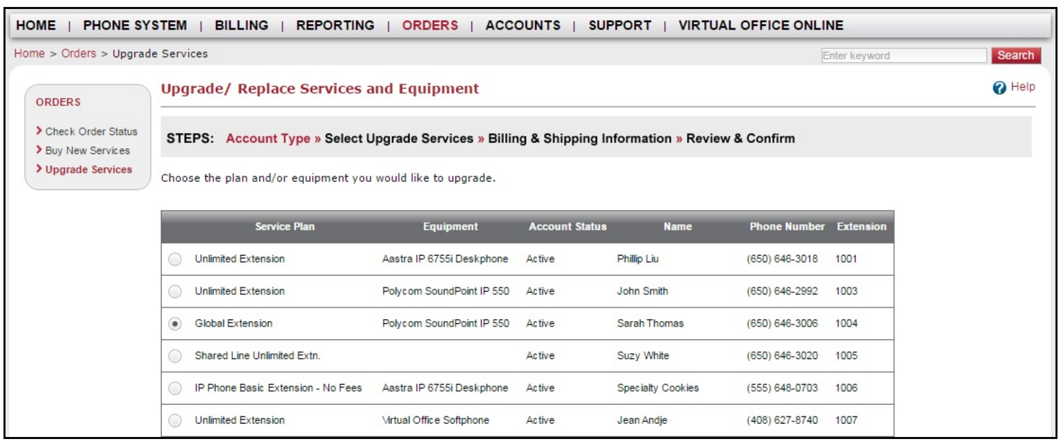
1. Click **Orders** in the top navigation bar.
2. Under the **Orders** menu, click **Upgrade Services**.

3. Select the service type you want to upgrade.



4. Click **Continue**.

5. Your service plans, along with the existing equipment that it is associated with your plan, are displayed. Select the plan or equipment you want to upgrade.



6. Click **Continue**.

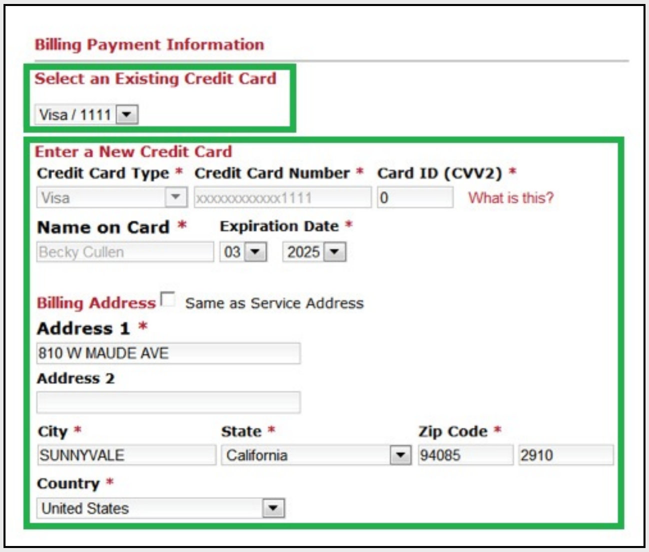
7. Select from the available upgrade options and new equipment presented.

> **Note:** If you do not see the service or equipment you want, contact 8x8 Sales at 866-879-8647.

8. Click **Continue**.

9. Enter your **Billing and Shipping Information**.
   a. To **Select an Existing Credit Card** already on file, click the drop-down arrow and make your selection.
   b. To **Enter a New Credit Card**, complete the required fields.

Note: Required fields are marked with *.



   c. Select the appropriate check box if your billing address and shipping address are the same.
   d. To edit or enter a billing or shipping address, complete the required fields.
10. Click **Continue**.
11. Review and confirm your order.

Accounts Overview

Using the Accounts tab, you can:

- Create user profiles
- Configure privileges
- Define company communication preferences
- Manage the Contact Directory
- Set up Single Sign-On
- Configure Analytics privileges

Access the Virtual Office Online App

In the Account Manager top navigation bar, you can find a tab for the Virtual Office online app for all phone administrators and privileged users whose profile is associated with a Virtual Office extension. Clicking this tab opens the Virtual Office online app in your browser. You can access additional features available with your 8x8 Virtual Office account.

About User Profiles

User profiles are required to give users access to their 8x8 system. Create a user profile first before you assign users to an extension or grant administrative privileges in Account Manager.

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

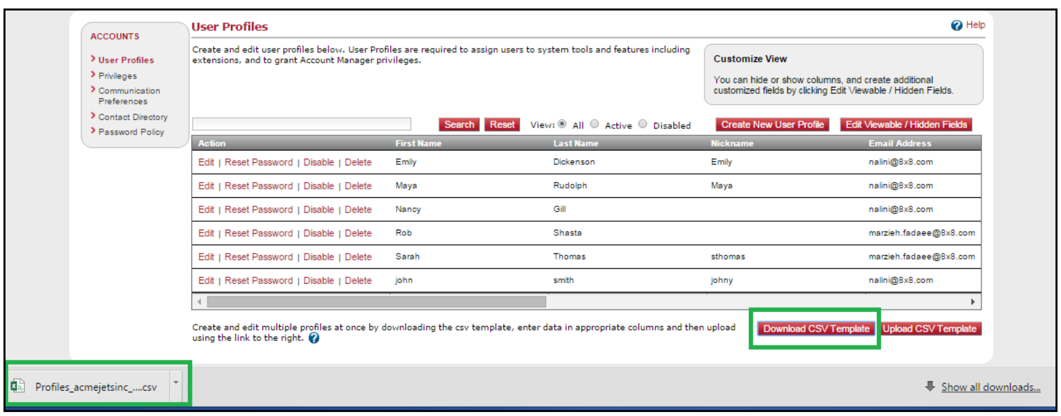
- First Name
- Last Name
- Email Address
- Username

Note: When creating a new user profile, by default the user name is the email address. The system administrator has the flexibility to change the user name to something other than the email address.

You can create user profiles one at a time or in bulk. To create a single user profile, refer to Step 1: Create a User Profile. Follow the instructions below to create multiple user profiles:

Create Multiple User Profiles

1. Click **Accounts** in the top navigation bar.
2. On **User Profiles**, click **View**.
3. Click **Download CSV Template** to download an Excel file that stores the user profile information.



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

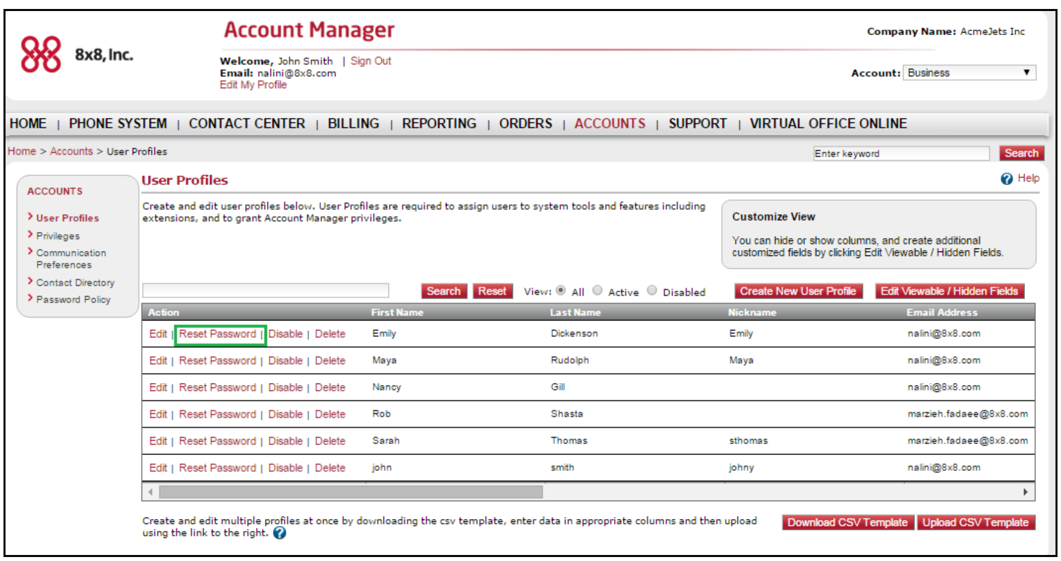
4. **Save** the file to your computer once you make all your changes.

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

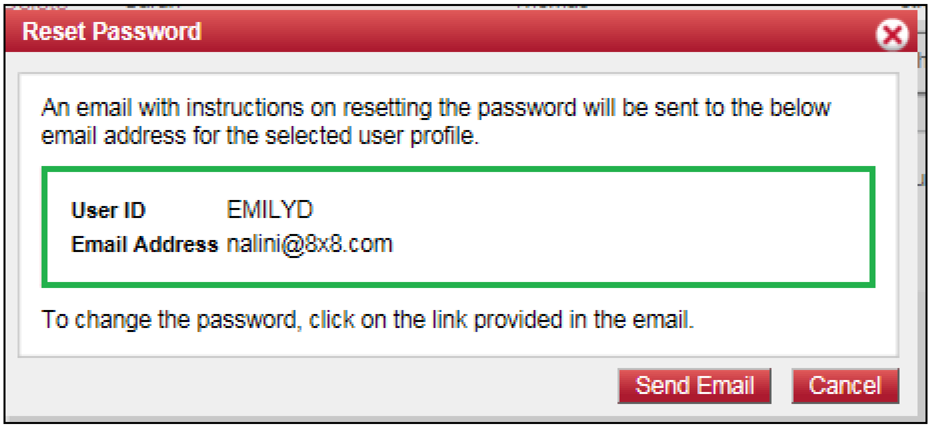
5. On the **User Profiles** page, click **Upload CSV Template**.
6. Click **Proceed**.
7. Click **Add**, and locate the file you just saved.
8. Click **Open**, then **Upload**.
9. Verify that the new information is correct, and click **Submit**.

Change User Profile Password

1. Click **Accounts** in the top navigation bar.
2. On **User Profiles**, click **View**.
3. Find the agent from the list, and click **Reset Password**.

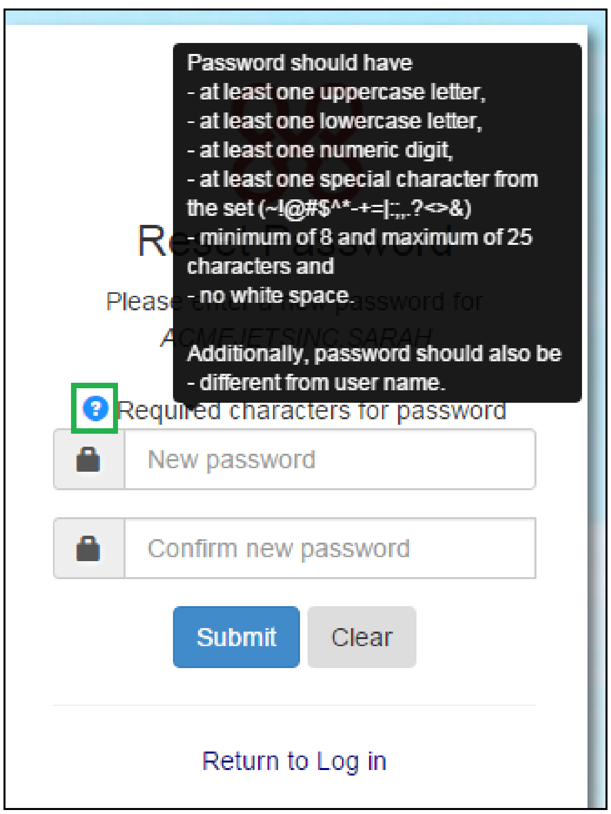


4. The **Reset Password** confirmation window opens.



Check the user ID and email address, and click **Send Email**.

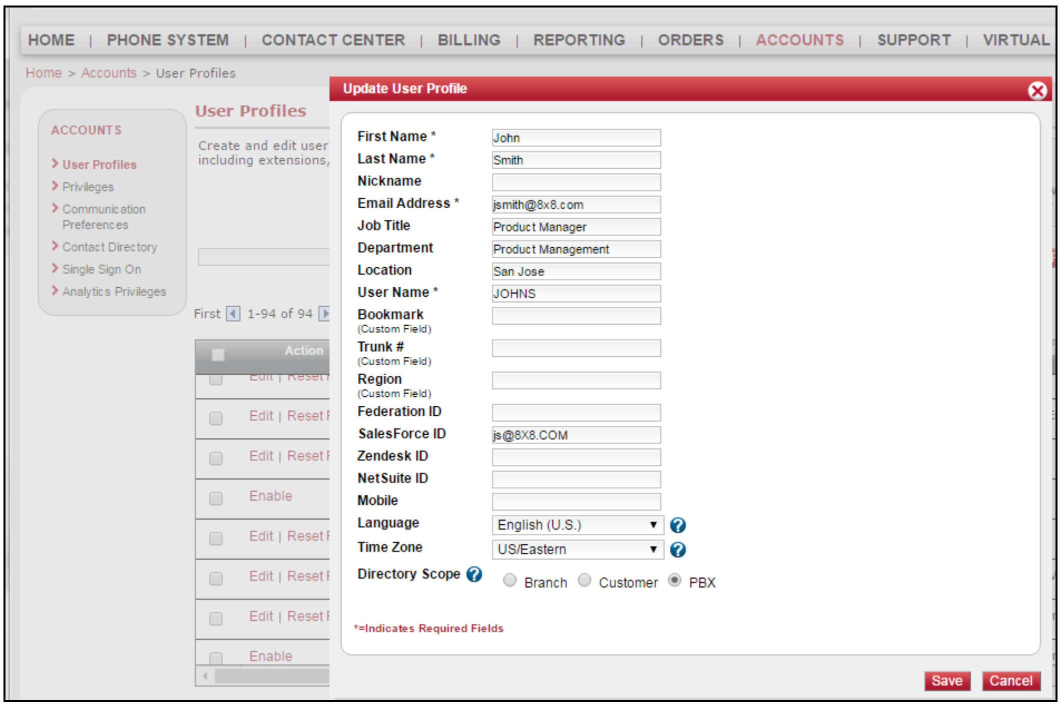
5. An email is sent to the agent's address as seen in the user profile. To change the password, the agent has to click the link provided in the email and follow the instructions.
The new password requires specific types of characters for security purposes. In the **Reset Password** window, hover over the question mark to see the requirements.



Create User Profiles

As an administrator, you can create user profiles one at a time or in bulk. To create an individual user profile:

1. Click **Accounts** in the top navigation bar.
2. Under the **Accounts** menu, click **User Profiles**.
3. Click **Create New User Profile**.
4. Enter user information. The mandatory fields are **First Name**, **Last Name**, **Email Address**, and **User Name** (by default, the user name is the email address).



5. Select a **Language** from the list. The user's email communications are sent in the selected language.
6. Select a **Directory Scope** level from the following options:
   - **PBX**: Allows access to all contacts within the PBX, including the branches.
   - **Customer**: Allows access to all contacts within the account (this may include multiple PBXs and branches within the PBXs).
   - **Branch**: Allows access to only the contacts assigned to that branch.

     By default, all users in a PBX are allowed access at the PBX level. If required, you can change access per user.

Note: Directory Scope is only applicable to enterprise customers with multiple PBXs and branches.

7. Click **Save**.

Note: For phone extensions that are not assigned to a specific individual, but instead located in a specific area like the front lobby, conference room, and so on, create a user profile for each area. For example, enter **Front** as a First Name and **Lobby** as the Last Name, and enter the email address of the person responsible for maintaining the extension settings (such as the primary system administrator).

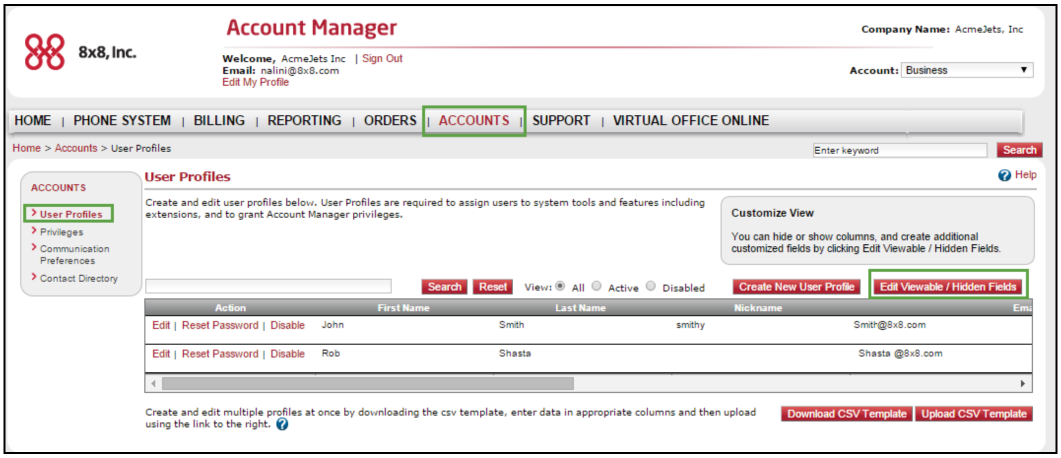
Disable User Profiles

To disable a user profile, click **Disable** in the **Action** column. Disabling a user profile removes the profile from all extensions and features the user profile has been assigned to.

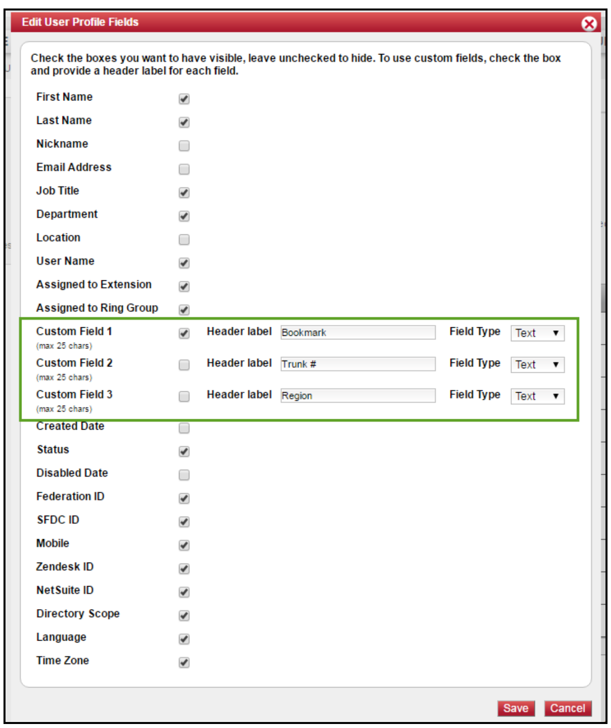
Note: You can re-enable a disabled user profile. However, you have to manually reassign the user profile to an extension or other feature. To maintain historical reporting, you are unable to delete a user profile completely from your system.

1. Click **Accounts** in the top navigation bar.
2. Under the **Accounts** menu, click **User Profiles**.

3. To hide available fields in the User Profile chart, click **Edit Viewable/Hidden Fields**.



4. Clear the check boxes next to the fields to hide.

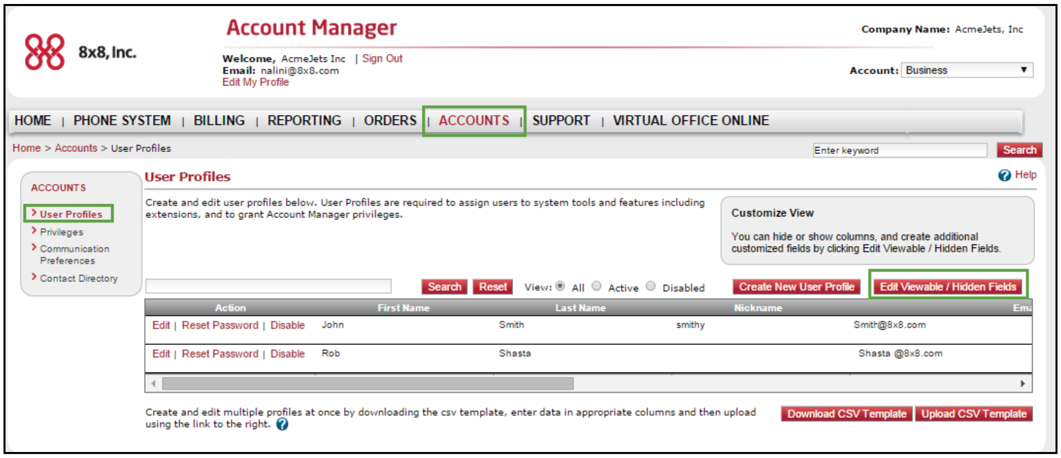


5. Click **Save**.

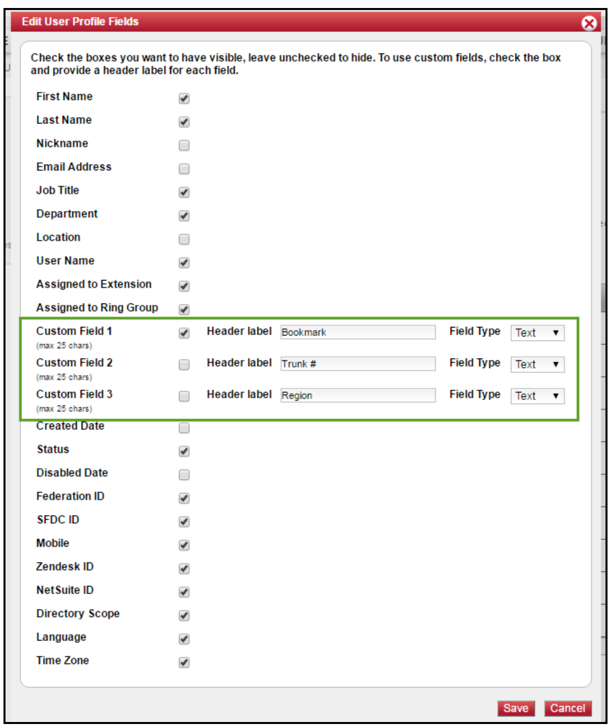
Phone system administrators can create up to three customizable fields.

Show Customizable Fields

1. Go to **Accounts > User Profiles**.
2. Click **Edit Viewable/Hidden Fields**.



3. Select the check boxes next to the fields to display.
4. Name the field by typing in the adjacent **Header Label** box.



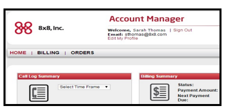
5. Click **Save**.

Configure Privileges

Every Virtual Office account has one primary administrator with privileges in all categories. This administrator's access cannot be edited or revoked. To grant administrator privileges to an individual, you must first create a user profile for them. Using Account Manager, you can assign users administrator privileges such as:

- Phone System
- Billing
- Reporting
- Orders
- Accounts
- Support

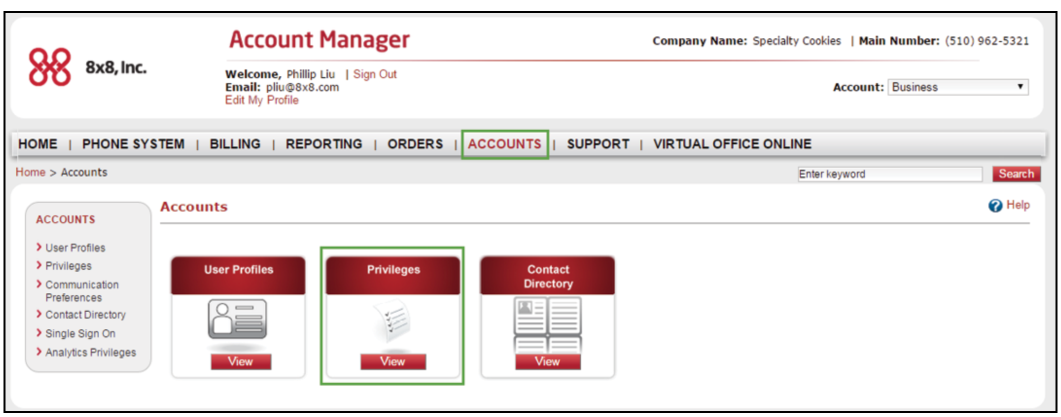
The primary administrator, and users with full privileges, can access all administrative areas. When they log in to Account Manager, they see complete navigation bar. However, when a user with limited privileges logs in to Account Manager, they only have access to specific areas. For example, an accountant who is only granted billing and ordering privileges sees the **Billing** and **Orders** tabs in the navigation bar in Account Manager.



Grant Privileges or Add a Second Admin

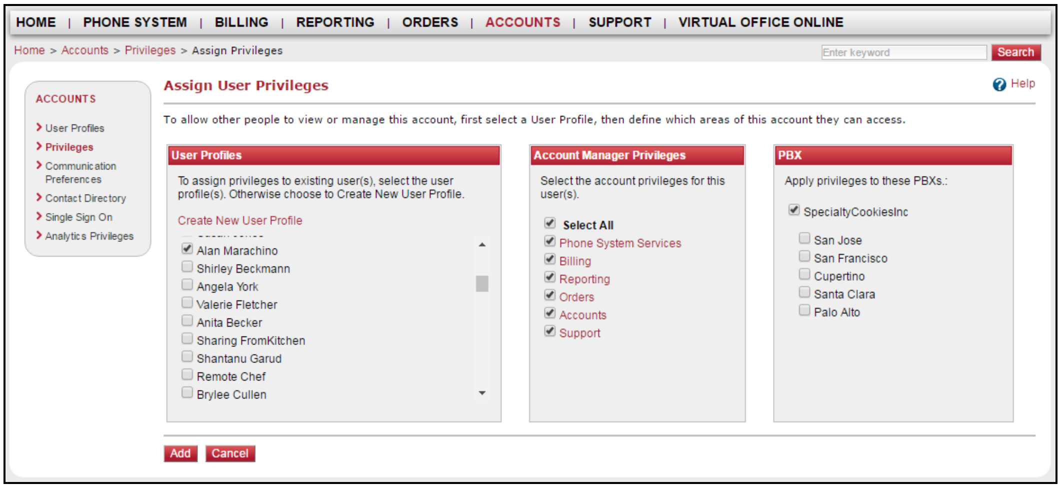
To grant privileges to an individual, you must first create a user profile for them.
For details, refer to Create User Profiles.

1. Click **Accounts** in the top navigation bar.

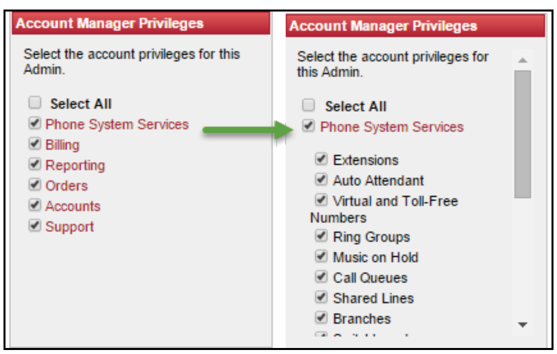


2. On **Privileges**, click **View**.

3. To select the new administrator's privileges manually, click **Assign New Privileges**.
4. Select a user profile, Account Manager privileges, and PBXs.



- By clicking a link like **Phone System Service**, more privileges specific to that category become available.



The following table lists the privilege category and sub-privileges available to choose from:

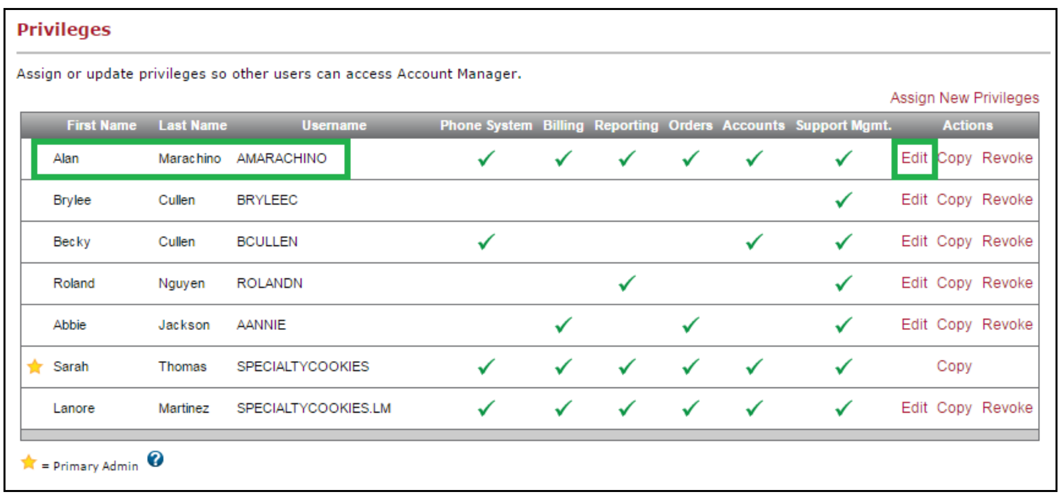
Privilege Category	Sub-Privileges
Phone System Services	The ability to create and manage: ▪ Extensions ▪ Auto Attendant ▪ Virtual and Toll-Free Numbers ▪ Ring Groups

Privilege Category	Sub-Privileges
	■ Music on Hold ■ Call Queues ■ Shared Lines ■ Branches ■ Switchboard ■ Paging ■ Company Settings ■ Number Transfer Request ■ Call Recording ■ Edit Voicemail / Fax Notifications ■ Group Call Pickup
Contact Center	The ability to create and manage: ■ Contact Center Calling Plans ■ Channel Rerouting
Billing	The ability to create and manage: ■ Statements ■ Billing Profile ■ Cost Centers
Reporting	The ability to create and manage Call Log Reports
Orders	The ability to: ■ Check Order Status ■ Buy New Services ■ Upgrade Services
Accounts	The ability to create and manage: ■ User Profiles ■ Privileges

Privilege Category	Sub-Privileges
	■ Communication Preferences ■ Contact Directory ■ Single Sign On ■ Analytics Privileges
Support	**Note:** The Support options previously available through Account Manager are now available through the 8x8 Support site. Please refer to our details on how to access and use 8x8 Support.

- If you have multiple PBXs, select which PBX these administrative privileges applies to. If your PBXs have branches, you can assign access by branches within each PBX as well.

5. Click **Add**.
6. When the dialog box appears confirming that the new administrator has been added, click **OK**.
7. The new administrator now appears in the list of administrators on the main **Privileges** page.



Edit Privileges

1. Click **Accounts** in the top navigation bar.
2. On **Privileges**, click **View**.

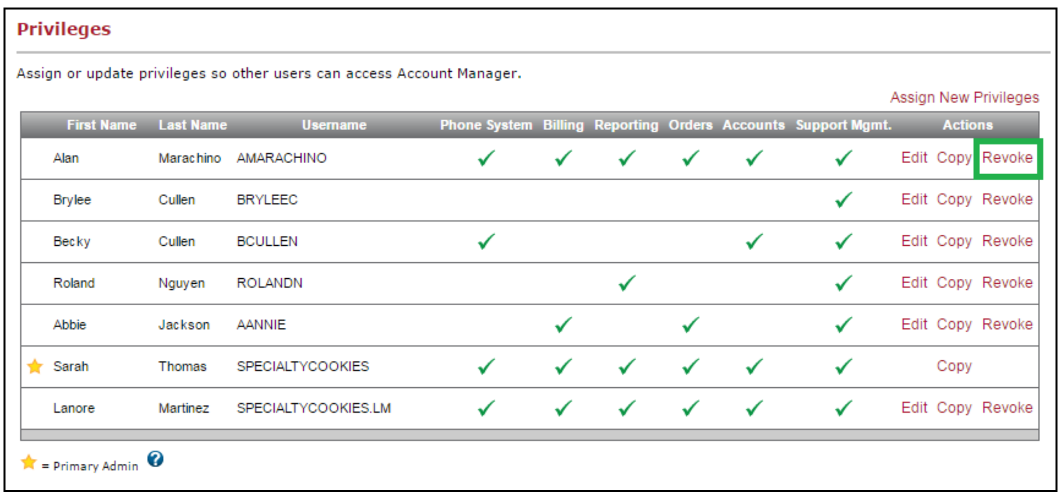
3. The list of current administrators appears. Click **Edit** to change an administrator's privileges.

> **Note:** the administrator marked with a star is the primary administrator whose privileges cannot be changed.

4. Update the user information and privileges for the selected administrator.
5. If you have multiple PBXs, select which PBX these privileges apply to.
6. Click **Save Changes**.
7. When the dialog box appears confirming your changes, click **OK**.

Revoke Privileges

1. Click **Accounts** in the top navigation bar.
2. On **Privileges**, click **View**.
3. The list of current administrators appears. Click **Revoke** to remove all administrative privileges for that user.


Privileges

Assign or update privileges so other users can access Account Manager.

Assign New Privileges

	First Name	Last Name	Username	Phone System	Billing	Reporting	Orders	Accounts	Support Mgmt.	Actions
	Alan	Marachino	AMARACHINO	✓	✓	✓	✓	✓	✓	Edit Copy Revoke
	Brylee	Cullen	BRYLEEC						✓	Edit Copy Revoke
	Becky	Cullen	BCULLEN	✓				✓	✓	Edit Copy Revoke
	Roland	Nguyen	ROLANDN			✓			✓	Edit Copy Revoke
	Abbie	Jackson	AANNIE		✓		✓		✓	Edit Copy Revoke
★	Sarah	Thomas	SPECIALTYCOOKIES	✓	✓	✓	✓	✓	✓	Copy
	Lanore	Martinez	SPECIALTYCOOKIES.LM	✓	✓	✓	✓	✓	✓	Edit Copy Revoke

★ = Primary Admin

> **Note:** the administrator marked with a star is the primary administrator whose privileges cannot be changed.

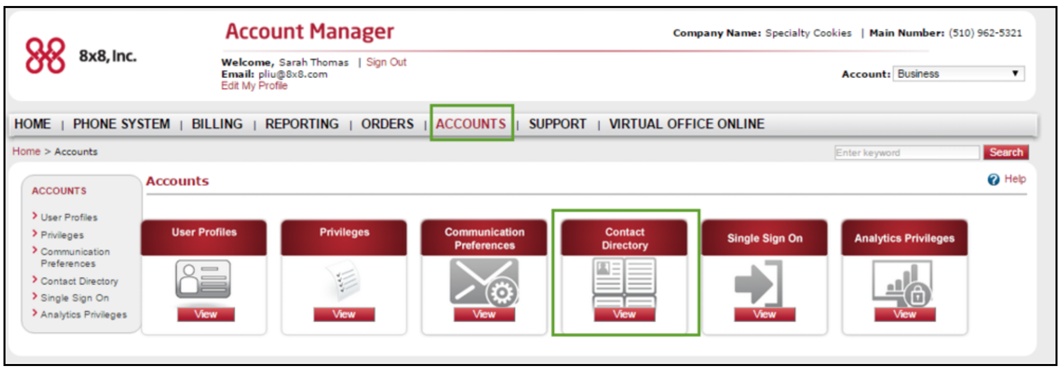
4. When the dialog box appears asking you to confirm that you want to revoke all administrative privileges for that user, click **Continue**.

Manage Contact Directory

The Contact Directory is an online directory for users to view their contacts and see who is online and available. Information used by the Contact Directory is pulled from user profiles that are created and maintained by your phone system administrator in your system's Account Manager.

Phone system administrators can exclude extensions and user profiles from the Contact Directory using Account Manager. By default, all extensions appear in the Contact Directory, and the user profiles that have not been assigned to an extension do not appear.

To configure the global system settings for your system's Contact Directory, go to the **Accounts** tab of Account Manager, and click **View** on **Contact Directory**.

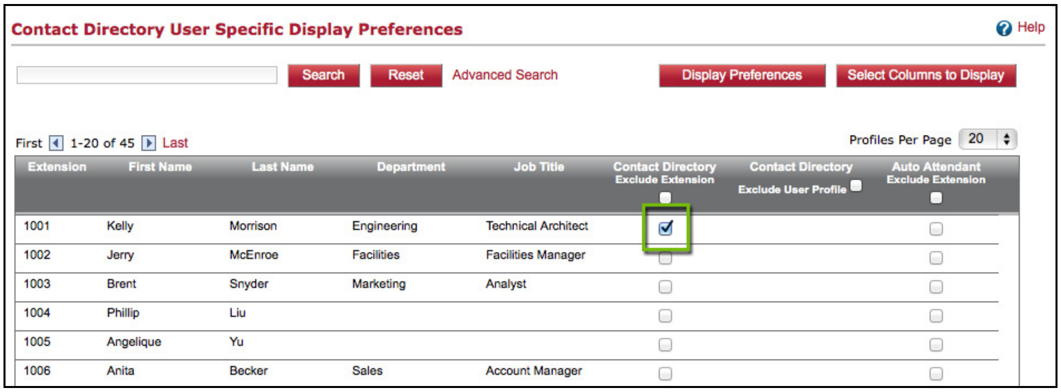


Note: Contact Directory data is pulled from the system's user profiles. To edit an individual contact's information, you must make the changes to the user profile. For details, refer to Create User Profiles.

Exclude Extensions from the Contact Directory

By default, all extensions and the user profile information attached to that extension, are shown in the Contact Directory. To exclude a user or service extension from the Contact Directory, select the corresponding check box in the

Contact Directory Exclude Extension column.



Include Contact Information for Non-Extension Users

By default, user profiles assigned to an extension are shown in the Contact Directory. However, phone system administrators can also choose to display contact information for user profiles not assigned to an extension. User profiles not assigned to an extension are displayed in the table below the extensions. To display contact information for a non-extension user profile, clear the corresponding check box in the **Contact Directory Exclude User Profile** column.

Exclude Contacts from the Auto Attendant Directory

When using the Auto Attendant feature of your phone system, you can give callers the option to:

- Dial by extension
- Dial by name
- Search directory

To exclude an extension from these three options, select the corresponding check box in the **Auto Attendant Exclude Extension** column.

Contact Directory Display Preferences

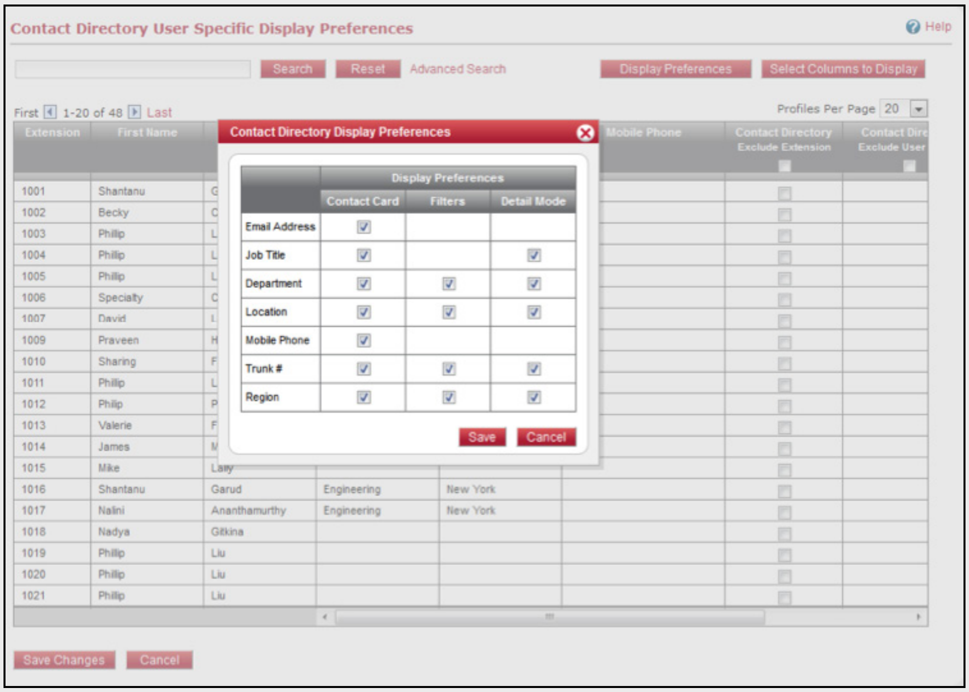
Phone system administrators can control what user profile information to display in the Contact Directory of user profiles. You can display Contact Card information such as email address, job title, and location, and also choose to filter contacts by department, or show more details for job titles.

1. To select which user profile information is available to display, click **Display Preferences**.
2. Select the check box to determine the data that is available to display or be used in the **Contact Card**, for contact

Filters, and to customize **Detail Mode**.

3. Click **Save**.

Note: By default, all but custom user profile fields are checked.



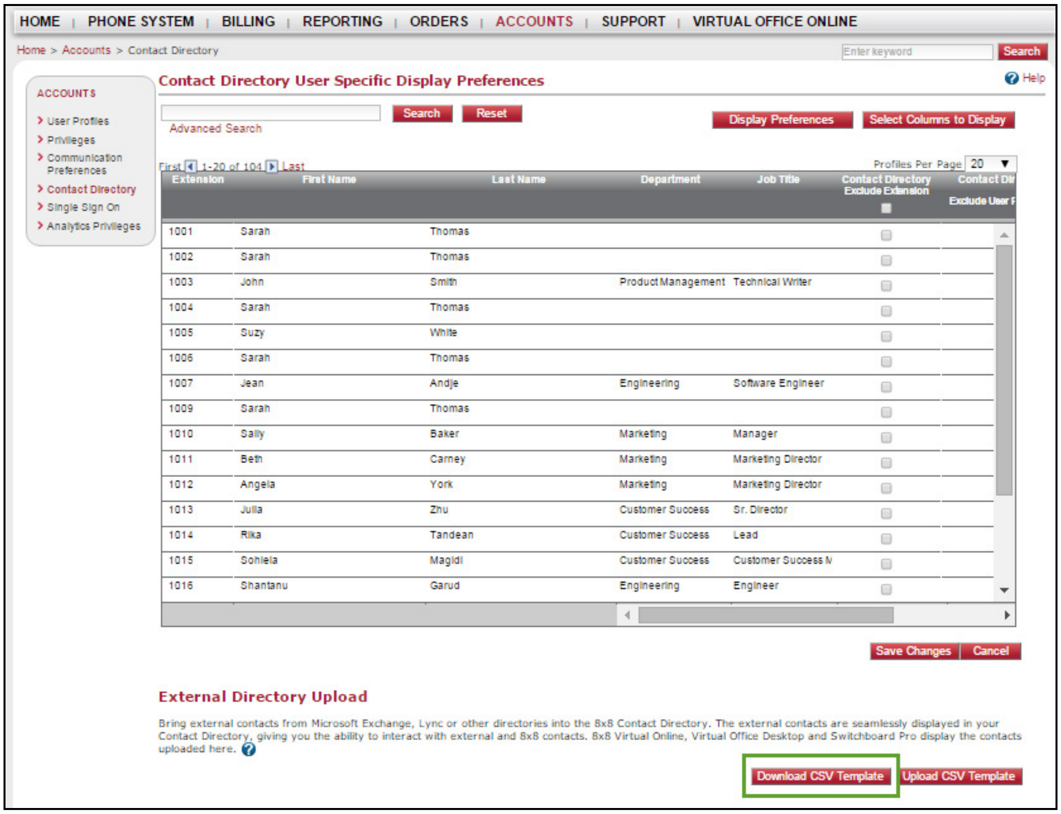
External Directory Upload

You can bring external contacts from Microsoft Exchange, Skype for Business, or other directories into the 8x8 Contact Directory. The external contacts are displayed in your Contact Directory, giving you the ability to interact with external and 8x8 contacts.

The Virtual Office desktop app and Switchboard Pro display the contacts uploaded in Contact Directory. In the Virtual Office mobile app, external directory contacts can be filtered by the application user.

To upload external contacts:

1. Go to **Accounts > Contact Directory**.
   Hover over the tool tip to learn about the upload requirements. This helps you comply with the upload requirements, and prevent errors while uploading the data.



2. To download and open the Comma-Separated Values (CSV) file in Excel, click **Download CSV Template**.
3. Add external contacts to the template file by entering the necessary details.

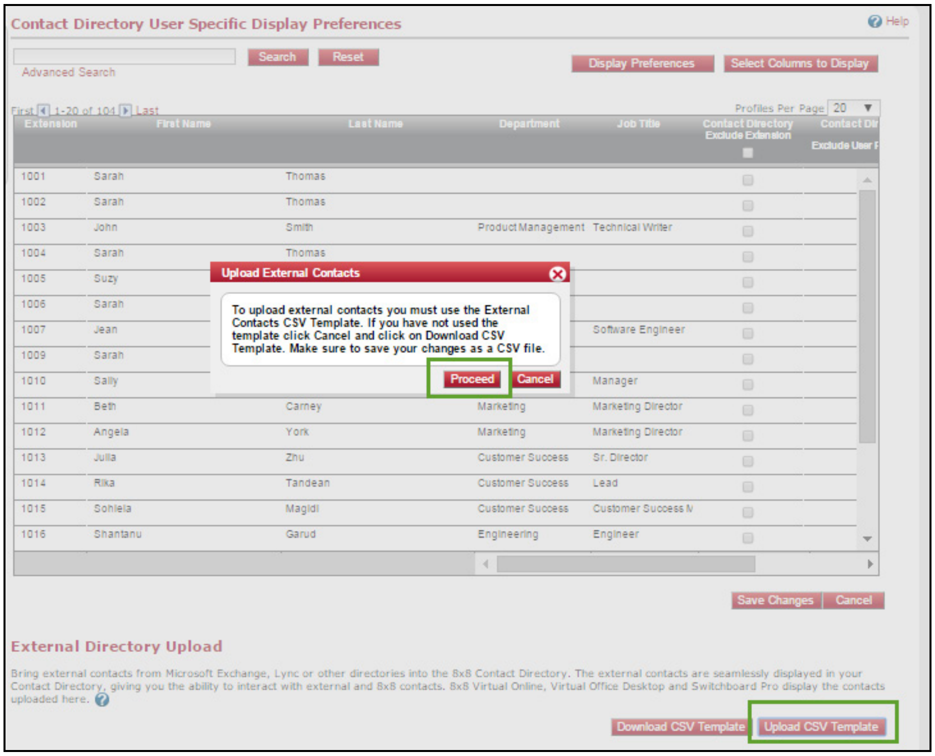
Notes:

-First name and last name are mandatory.

-Address entries are separated by a <_>. Multiple entries such as work address and home are separated by a <;> without a space. For example, you can have two entries written as <123 Street_San Jose_CA_12345_USA_WORK;456 Street_San Jose_CA_12345_USA_HOME>.

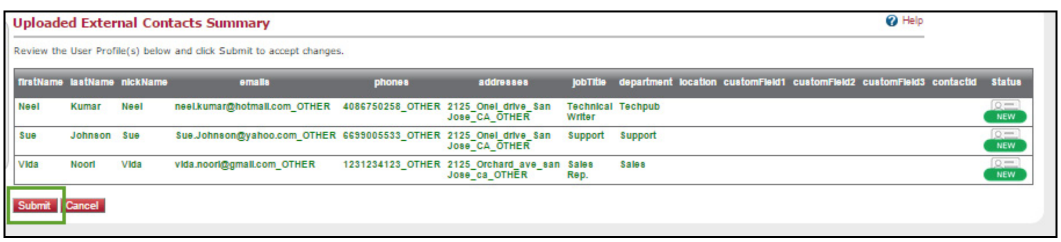
4. Once you have added all the data, **Save** the file to your computer.
5. In **Accounts > Contact Directory**, click **Upload CSV Template**.

6. If your browser prompts you to accept the download, click **Proceed**.

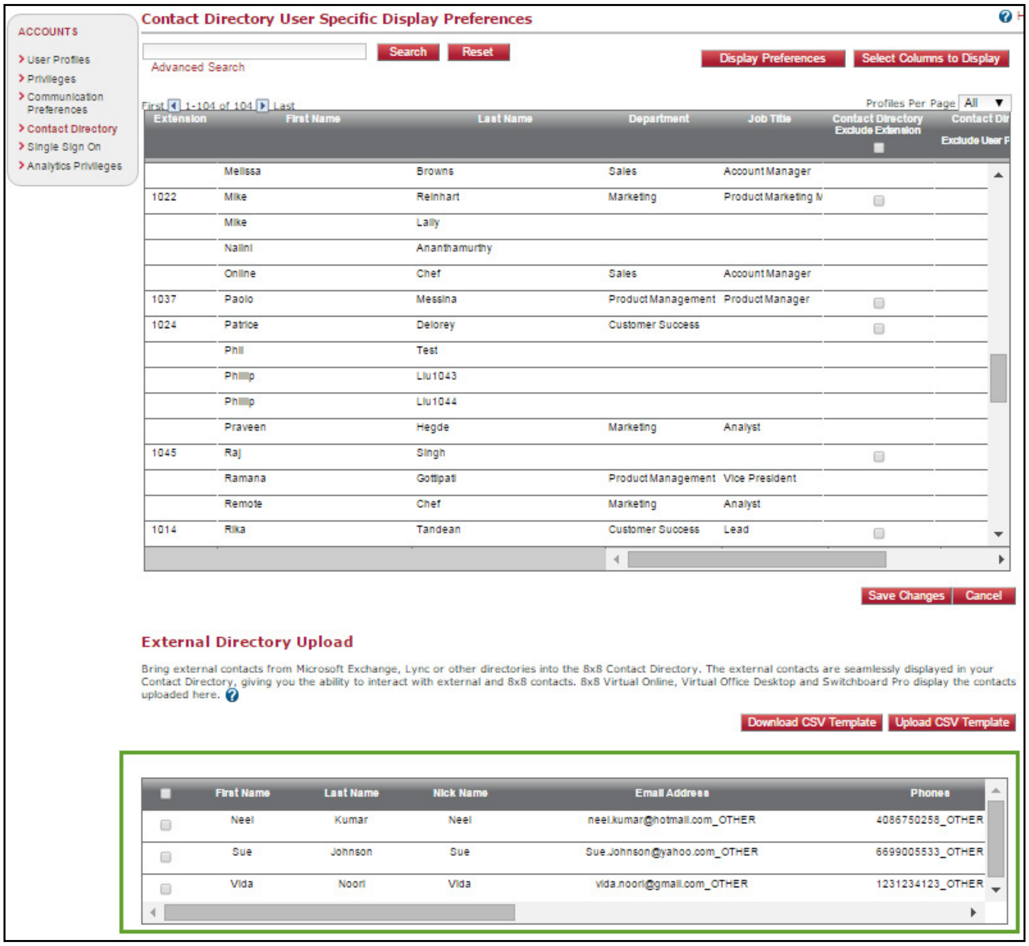


7. Click **Add**.
8. Locate the file you just saved, and click **Open**.
9. Click **Upload**.

   If you encounter any errors, please check the error message, fix the issues in the CSV file, and upload again.
10. Verify that the new information is correct, and then click **Submit**.



The new contacts appear in the **External Directory Upload** table.



SAML and Google Federated Single Sign-On

Customers with identity management systems like Okta, OneLogin, Ping Identity, and Microsoft ADFS require their employees to authenticate to 8x8 apps using their company ID instead of an 8x8 username and password. In this release, we support SAML 2.0 & Google OAuth Federated Single Sign-On (SSO) for the following 8x8 applications that use the shared 8x8 login page:

- Account Manager
- Virtual Contact Center
- Virtual Office desktop app

- Virtual Office online app
- Virtual Office mobile app
- Virtual Office Analytics
- Switchboard Pro

With support for Federated SSO, users can log in to 8x8 applications through their company's identity management system.

Identity Mapping

Ideally, the system maps each company user to an 8x8 user via the 8x8 username. If your company's 8x8 usernames are not unique email addresses, you have to populate either of these new 8x8 user attributes via Account Manager:

- For SAML SSO: Federated ID
- For Google SSO: Google ID

Configure Federated Single Sign-On

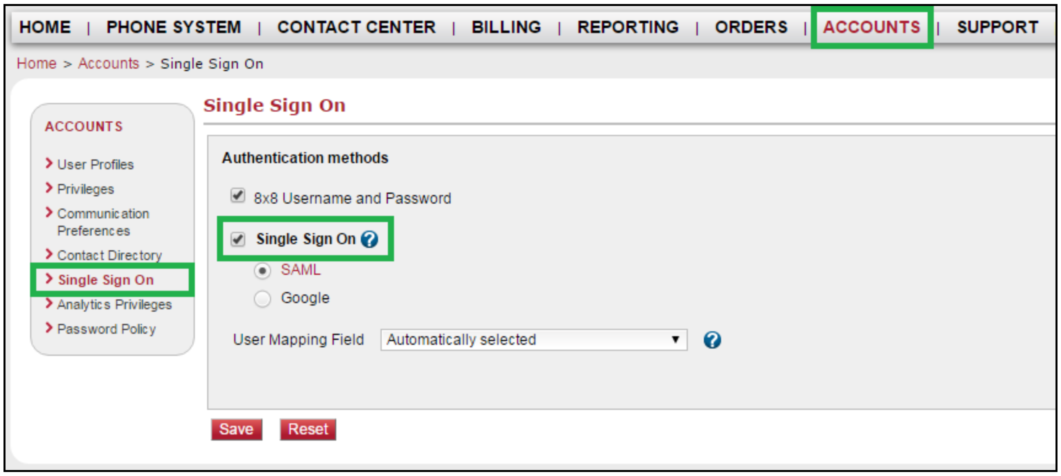
Configuring access to 8x8 applications via federated SSO requires you to:

1. **Set up SAML in the company's identity management system**: Not covered in this document, since the process varies with the identity management system adopted by your company, and is typically managed by its administrator.
   - **For Okta**: Search for **8x8 Inc** in the Okta Application catalog and add it. Follow the SAML 2.0 setup instructions provided for 8x8 users with matching Okta usernames. For 8x8 users without matching Okta usernames, the Federated ID is populated as normal in Account Manager.
   - **For OneLogin**: Search for **8x8** in the OneLogin Application catalog. Under **Configuration > Connectors**, select **Connector Version: SAML 2.0**.
2. **Set up Single Sign-On in Account Manager**: Set up by the Virtual Office administrator. The administrator must set up Single Sign-On and specify the identity provider used by the company.

   To set up Single Sign-On:

   1. Click **Accounts** in the top navigation bar.

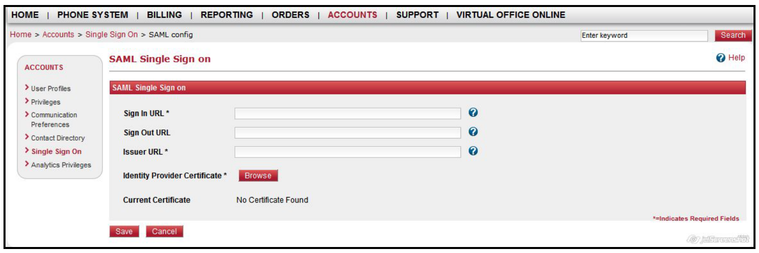
2. Under the **Accounts** menu, click **Single Sign-On**.



3. Select an identity provider from the following choices:
   - **8x8 Username and Password**: Allows users to log in to 8x8 applications using an 8x8 username and password. If this check box is cleared, only the primary administrator can log in using their 8x8 username and password. All other users must use Google or SAML SSO.
   - **SAML**: Allows users to log in to 8x8 applications by signing in via SAML.
   - **Google**: Allows users to use a Google ID to to log in to 8x8 applications.
4. Select the **User Mapping Field** that maps each user from your SAML identity provider or Google directory to 8x8. The system begins by matching via 8x8 username. If that fails, 8x8 looks up and matches via Federated ID (for SAML) or Google ID (for Google OAuth).
   - **8x8 Username**: The system maps via 8x8 username.
   - **Federated ID**: For SAML, 8x8 maps via Federated ID.
   - **Google ID**: For Google OAuth, 8x8 maps via Google ID.
5. **Save** these settings.
6. If you selected **SAML**,you should specify the following:
   - **Sign In URL**: User authentication URL provided by identity provider (IDP).
   - **Sign Out URL**: User sign out URL provided by IDP to end the IDP session. The 8x8 app calls this URL after you log out of the 8x8 app. If your IDP can redirect to another URL after it ends the IDP session, you should append the variable string <{8x8Logout}>, which inserts the 8x8 login URL so the user can log back in later.

For Okta, the sign out URL may be **https://YOUR_COMPANY.okta.com/login/signout?fromURI={8x8Logout}**.

- **Issuer URL**: IDP identifier.
- **Identity Provider Certificate**: Your identity management system should provide an X.509 certificate file to download. Browse to locate the certificate file and upload here.



The certificate file is validated and notifies you of any errors.

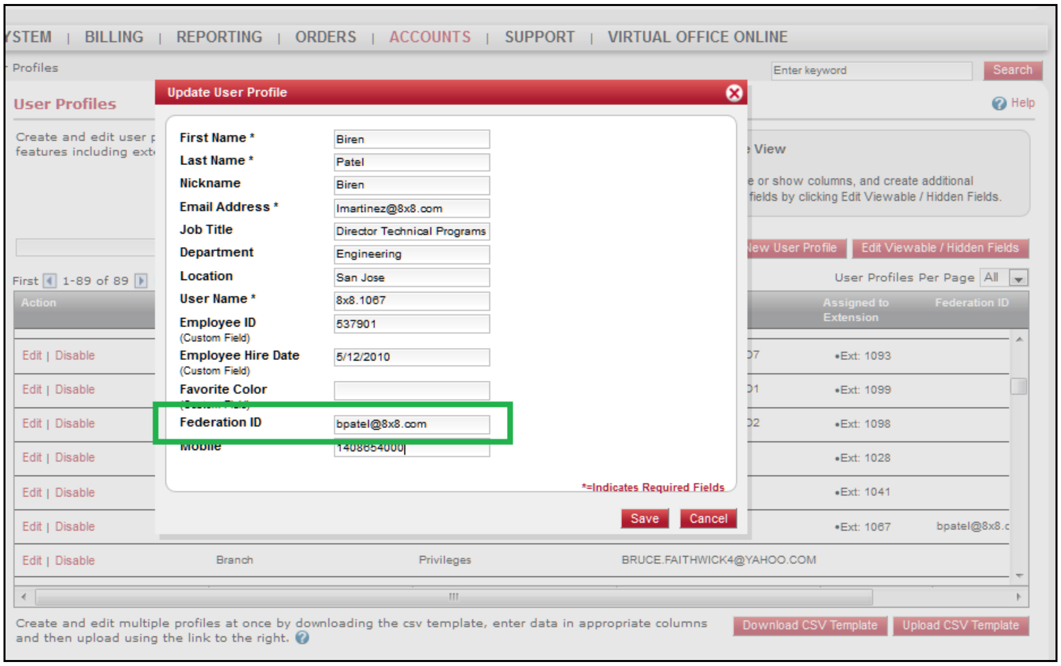
7. Click **Save**. This completes the configuration of SAML or Google-federated SSO.

3. **Define Federated ID or Google ID in User Profiles**: This step is optional. If your company does not use unique email addresses for 8x8 usernames, then you must map Virtual Office users to their Federated ID (for SAML) or Google ID (for Google) in the list of user profiles.

To define Federated ID or Google ID:

1. Click **Accounts**.
2. Under the **Accounts** menu, click **User Profiles**.
3. To edit an individual profile:
   a. Click **Edit** next to the desired user.
      Based on the choice of identity provider, the corresponding mapping field shows:
      - For SAML, the Federated ID field is available.
      - For Google, the Google ID field is available.

   b. From the list, edit the desired user profile to add the mapping field data:
      - For SAML, populate the Federated ID.
      - For Google, populate the Google ID.



4. To edit profiles in batches:
   a. Click **Download CSV Template**.
   b. Open the downloaded CSV file in Microsoft Excel, or any spreadsheet app.
   c. Add the desired username to the relevant ID field for each user, and save the file.
   d. From Account Manager, click **Upload CSV Template** to upload the edited file.
5. Save your changes.

For 8x8 Users with Matching Okta Usernames

If all your users have 8x8 usernames (such as jdoe@anycompany.com) that match (not case-sensitive) their Okta usernames:

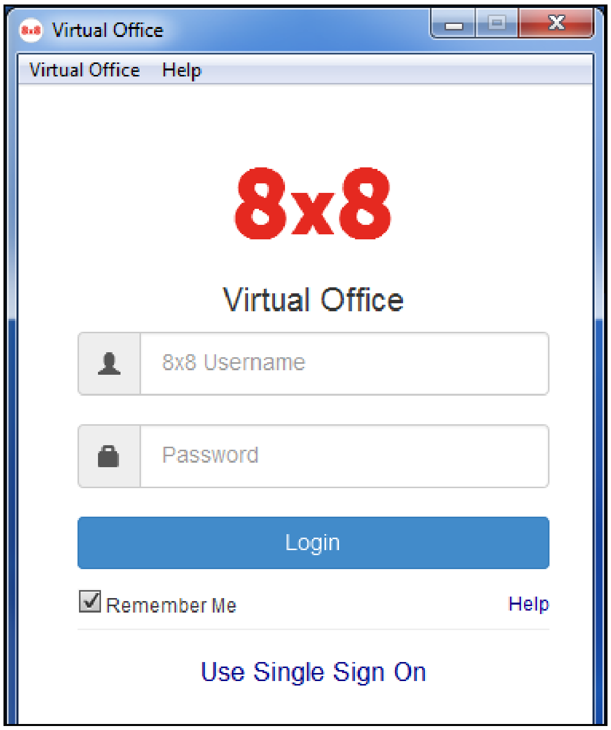
- No additional 8x8 user configuration is required for Single Sign-On.
- 8x8 uses the **8x8 Username** field to map each 8x8 user account to the Okta user account.

Note: If you have any users with 8x8 usernames that do not match their Okta usernames, you must define the Federated ID in the user profile for all users manually in Account Manager.

Sign in Using Federated SSO

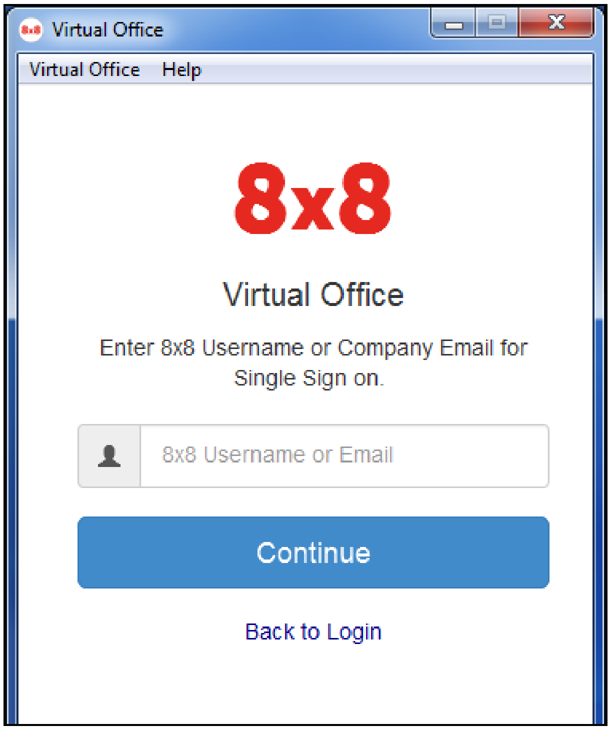
The sign-in process for 8x8 applications is similar whether it is authenticated via SAML or Google. The initial sign-in process takes users through the Virtual Office login page. Go to the 8x8 SSO login page, or launch the Virtual Office desktop app.

1. In the login screen, click **Use Single Sign On**.



The SSO login prompt opens.

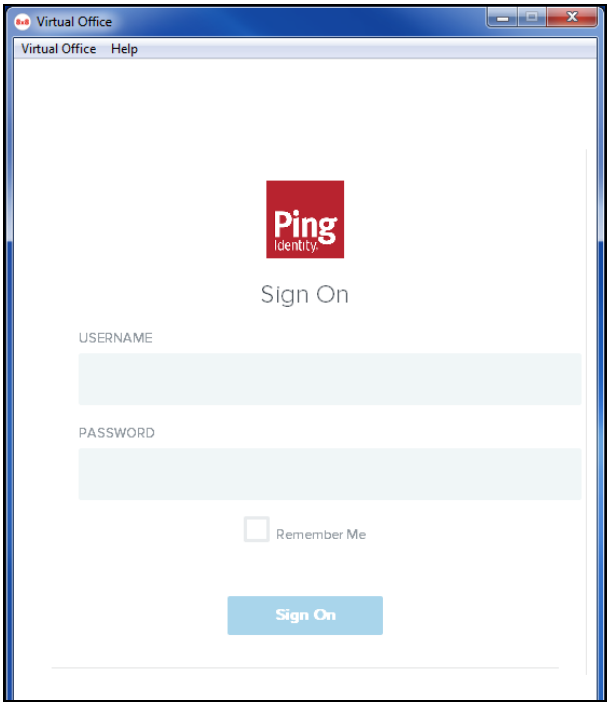
2. Enter your 8x8 username or company email for validation.



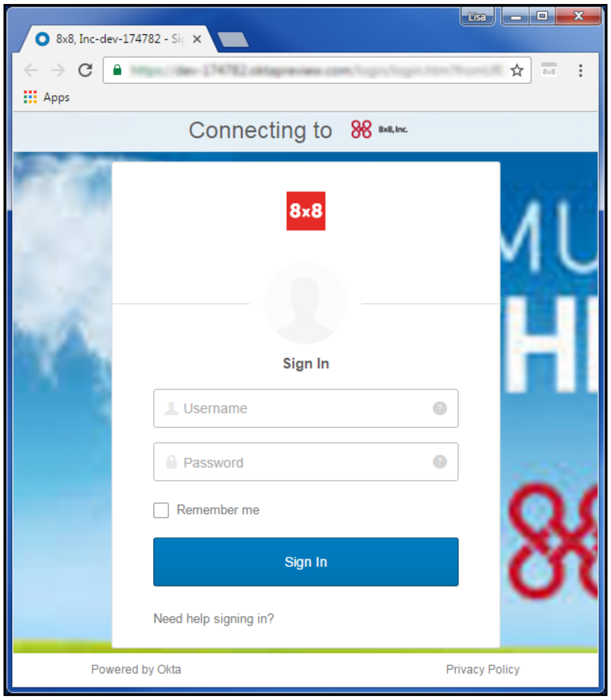
3. Click **Continue** to view your SSO options.
4. Click **Log in using SAML** to open your identity provider's login page.
   OR
   Click **Log in using Google** to open the Google login page.

> **Note:** Clicking **Clear SSO Setting** takes you back to the first login page.

- **To log in with SAML:**
  a. If you selected **Log in using SAML**, your company's identity provider login page opens.



Note: If you log in using Okta or Centrify, the login page opens in a new browser tab instead of in the application window. Until you log in, the application window reads **Login from browser...**.



b. Enter the credentials to log in to the identity provider.

The application launches.

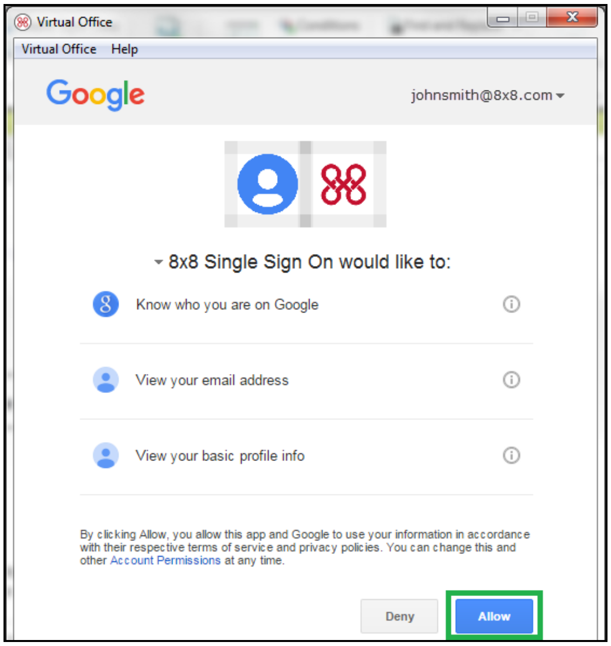
> **Note:** For consecutive SSO login sessions, you are routed from the custom login page (Step 4).

- **To log in with Google:**

a. If you selected **Log in using Google**, the Google login page opens.

b. Enter your company Gmail address and password.

c. Click **Allow** to grant 8x8 single sign-on access to your Gmail profile.



You are now authenticated to your 8x8 app. The application launches.

5. When prompted, click **Allow** to enable Adobe Flash Player settings to access your camera and/or microphone.

Configure Analytics Privileges

Virtual Office Analytics is currently offered in three separate bundles:

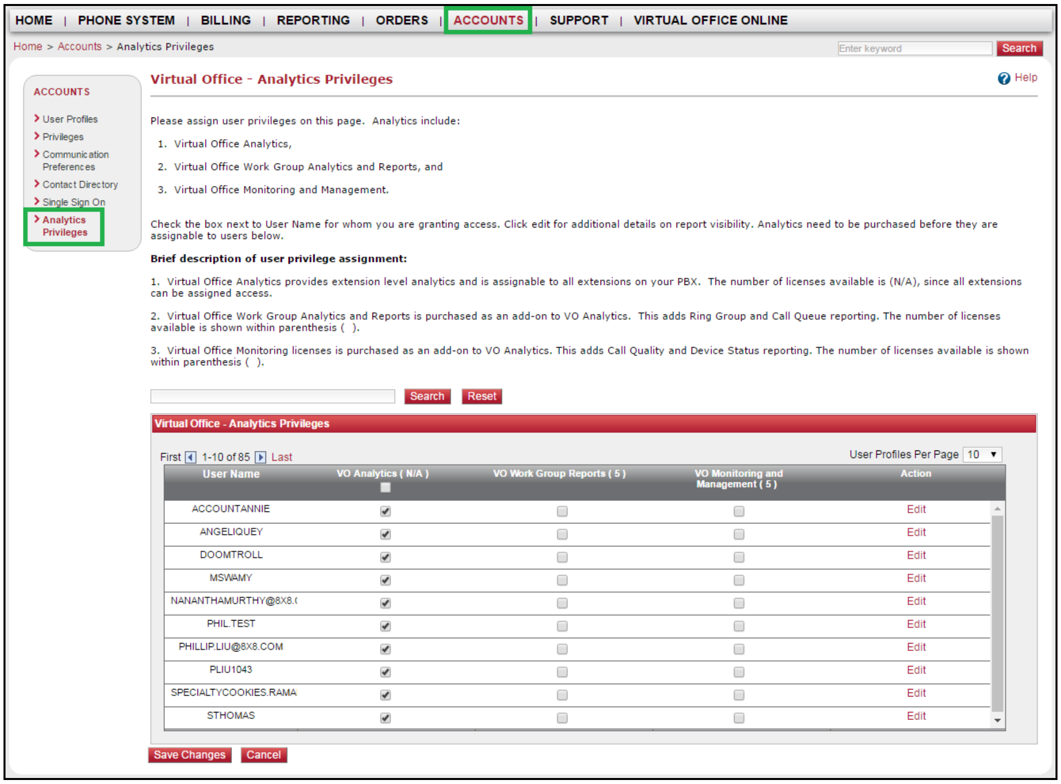
- **Virtual Office Analytics**: Comprehensive set of unique dashboards and reporting options for all extensions in an organization's 8x8 cloud PBX.
- **Virtual Office Analytics Supervisor**: A real-time view of all call activity for selected call queues or ring groups within the 8x8 cloud PBX. Get comprehensive call center-quality reporting in a single dashboard view, available on any device.
- **Virtual Office Analytics Service Quality**: Real-time information about endpoint devices and call quality.

To configure privileges for Virtual Office Analytics:

1. Click **Accounts** in the top navigation bar.

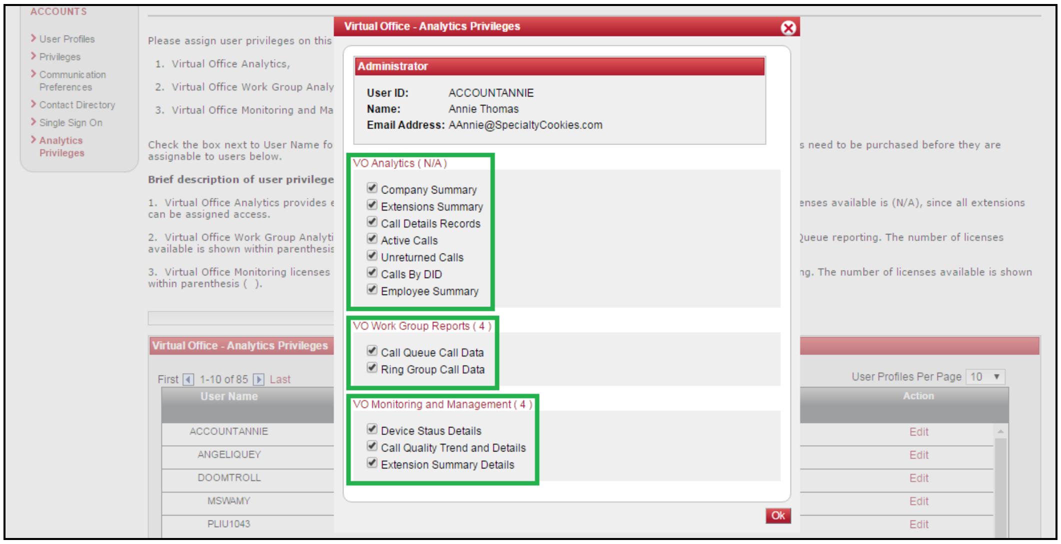
2. Under the **Accounts** menu, click **Analytics Privileges**.

   A list of available administrators displays.



3. Click **Edit** next to an administrator to manage their dashboard privileges.

4. In the pop-up, click the drop-downs to display the available privileges.



5. Select or clear the check boxes for the desired privileges at the extension level.
6. Click **Ok**.

Get Support

The options previously available on Account Manager's Support menu are now available through http://support.8x8.com.

Find solutions and answers to your phone system questions, report issues and submit questions, find out about 8x8 network alerts, manage cases, and transfer your telephone numbers from another service company to 8x8 by going to 8x8 Support.

You must log in to your 8x8 account to access all available options. If you are already logged in to Account Manager, click the **Support** tab.

Number transfer is also accessible via **Phone System > Number Transfer Request** in Account Manager. See Request Number Transfer for details.

FAQ

Check the following frequently asked questions for more information:

Which localization settings are required for a PBX extension user?

As a phone system administrator, you can enable localization language settings at the PBX level, branch level, or at the extension user level. The language settings at the user level overrides all other settings.

The following table summarizes the localization settings in Account Manager:

Setting	Description	Configured At
Edit My Profile	The primary or secondary administrators who have access to Account Manager can configure the **Language** setting in **Edit My Profile** to communicate emails in their language of choice. This setting overrides the default PBX or branch language setting. It only applies to the administrator's email communications.	User level
Account > User Profiles	Configure the **Language** setting for extension users to communicate emails in their language of choice. This setting in user profile overrides the default PBX or branch language. It only applies to the user's email communications.	User level
Phone System > Company Settings	Configure the **Language** setting for all users in the PBX to receive Telephony IVR messages, such as voicemail greetings in the selected language. This setting is overridden by language settings at the branch and/or individual extension level. In the absence of the individual extension user's language of choice, the language setting of branch overrides the PBX language setting.	PBX level

Setting	Description	Configured At
Phone System > Branches (Add-on subscription-based)	Configure the **Language** setting for users to receive Telephony IVR messages, such as voicemail greetings in the selected language. In the absence of the individual extension user's language of choice, the branch language setting overrides the PBX company language setting. In other words, if an extension belongs to a branch set to Japanese, and if you have not defined another language at the extension level, Telephony IVR messages are played in the Japanese language. If the extension belongs to a branch with no other language defined, you inherit the PBX language.	Branch level
Phone System > Edit Individual Extension	Configure the **Language** setting for extension users to receive Telephony IVR messages, such as voicemail greetings in the selected language. The display on the user's desk phone also appears in this language. This setting overrides the PBX and branch language setting. **Note:** If you need help with setting the user language in bulk, contact 8x8 Support for help. **Note:** To access localized versions of 8x8 Virtual Office applications, refer to your computer or device manual to learn how you can change the display language of your operating system.	Extension level

Note: The PBX or branch language does not affect the agent's desk phone display. You must select the language of preference for the individual extension user. For details, refer to Edit Individual Extensions.

Note: The agent cannot control any localization settings. The localization is configured at the user level, individual extension user level, PBX level, and branch level all in the Account Manager and by the primary administrator.

Appendix A

The following table shows the different Power Keys plans and the numbers of LAK and BLF keys included with them:

Up to 4 Line Appearance Keys
Up to 4 BLF Keys*

Polycom Phone	# of Physical Line Keys	Virtual Receptionist Plans	Maximum Key Configuration
IP 550, IP 560	4	VR4 Plan	Up to 4 Line Appearance Keys and/or up to 2 BLF Keys*
VVX 300, VVX 310, IP 670	6	VR4 Plan	Up to 4 Line Appearance Keys and/or up to 4 BLF Keys*
VVX 300, VVX 310, IP 670	6	VR6 Plan	Up to 6 Line Appearance Keys and/or up to 4 BLF Keys*
VVX 400, VVX 410, VVX 500	12	VR4 Plan	Up to 4 Line Appearance Keys and/or up to 4 BLF Keys*
VVX 400, VVX 410, VVX 500	12	VR6 Plan	Up to 6 Line Appearance Keys and/or up to 6 BLF Keys*
VVX 400, VVX 410, VVX 500	12	VR14 Plan	Up to 6 Line Appearance Keys and/or up to 10 BLF Keys*
VVX 600	16	VR4 Plan	Up to 4 Line Appearance Keys and/or up to 4 BLF Keys*
VVX 600	16	VR6 Plan	Up to 6 Line Appearance Keys and/or up to 6BLF Keys*
VVX 600	16	VR14 Plan	Up to 6 Line Appearance Keys and/or up to 14 BLF Keys*

*Limited by the number of spare Line Keys available on your phone

Polycom Phone	Sidecar Model	#of Physical Keys	Virtual Receptionist Plans	Maximum Key Configuration
VVX 300, VVX 310, VVX 400, VVX 410, VVX 500, or VVX 600	VVX Sidecar 28 Key - Color	28 (3 pages of 28)**	VR28 Plan	Up to 10 LAK, and/or up to 28 BLF
VVX 300, VVX 310, VVX 400, VVX 410, VVX 500, or VVX 600	VVX Sidecar 40 Key - Paper Label	40	VR40 Plan	Up to 10 LAK, and/or up to 40 BLF

Appendix B

Backing up the Contact Directory on the phone device is essential before editing any keys in Account Manager the first time. It is done automatically once the back-up server launches. Configuring line keys in Account Manager allows central editing after the local directory is saved once, in order to prevent the accidental loss of locally-saved contact data on the phone. You can add a dummy new entry on the phone and save it for a quick backup.

To back up the Contact Directory from your phone device:

1. Press to display the **Home** view.
2. From the menu, go to **Directories > Contact Directory**.
3. Select a contact to edit, or use to create a new contact.
4. Edit a contact:
   a. Select a contact and press **Edit**. Scroll down the list of options and select **Favorite Index** if you wish to put the contact on Speed Dial.
   b. Assign an index according to where you want the contact to display on the phone or SideCar.
5. Press **Save** to save the contact and back up the Contact Directory.

Appendix C

End users can edit speed dials from the phone user interface using indexes for the key positions and assign to Contact Directory entries.

1. Identify and catalog current key locations (LAKs, BLFs, and Speed Dial keys) on your Polycom VVX 500, VVX 600 telephone set(s), and sidecars.
2. Determine your new desired key locations for both phone set and sidecar. See charts below.

> **Note:** When assigning any key to an index, ensure that the index is not already assigned to an existing LAK, BLF, or Speed Dial key.

3. To relocate or move any key, re-assign its favorite index to point to a line key position that is currently available.

Note: Only PBX Administrators can reassign the locations of LAKs and BLFs.

Polycom 300/310	
Index 1	Index 4
Index 2	Index 5
Index 3	Index 6

Polycom 400/410	
Index 1	Index 7
Index 2	Index 8
Index 3	Index 9
Index 4	Index 10
Index 5	Index 11
Index 6	Index 12

VVX 500		
Index 1	Index 5	Index 9
Index 2	Index 6	Index 10
Index 3	Index 7	Index 11
Index 4	Index 8	Index 12

VVX 600			
Index 1	Index 5	Index 9	Index 13
Index 2	Index 6	Index 10	Index 14
Index 3	Index 7	Index 11	Index 15
Index 4	Index 8	Index 12	Index 16

Sidecar 28		Sidecar 28		Sidecar 28	
Index 101	Index 115	Index 201	Index 215	Index 301	Index 315
Index 102	Index 116	Index 202	Index 216	Index 302	Index 316
Index 103	Index 117	Index 203	Index 217	Index 303	Index 317
Index 104	Index 118	Index 204	Index 218	Index 304	Index 318
Index 105	Index 119	Index 205	Index 219	Index 305	Index 319
Index 106	Index 120	Index 206	Index 220	Index 306	Index 320
Index 107	Index 121	Index 207	Index 221	Index 307	Index 321
Index 108	Index 122	Index 208	Index 222	Index 308	Index 322
Index 109	Index 123	Index 209	Index 223	Index 309	Index 323
Index 110	Index 124	Index 210	Index 224	Index 310	Index 324
Index 111	Index 125	Index 211	Index 225	Index 311	Index 325
Index 112	Index 125	Index 212	Index 225	Index 312	Index 325
Index 113	Index 127	Index 213	Index 227	Index 313	Index 327
Index 114	Index 128	Index 214	Index 228	Index 314	Index 328

Sidecar 40 - #1		Sidecar 40 - #2		Sidecar 40 - #3	
Index	Index	Index	Index	Index	Index

Sidecar 40 - #1		Sidecar 40 - #2		Sidecar 40 - #3	
101	121	201	221	301	321
Index	Index	Index	Index	Index	Index
102	122	202	222	302	322
Index	Index	Index	Index	Index	Index
103	123	203	223	303	323
Index	Index	Index	Index	Index	Index
104	124	204	224	304	324
Index	Index	Index	Index	Index	Index
105	125	205	225	305	325
Index	Index	Index	Index	Index	Index
106	125	206	225	306	325
Index	Index	Index	Index	Index	Index
107	127	207	227	307	327
Index	Index	Index	Index	Index	Index
108	128	208	228	308	328
Index	Index	Index	Index	Index	Index
109	129	209	229	309	329
Index	Index	Index	Index	Index	Index
110	130	210	230	310	330
Index	Index	Index	Index	Index	Index
111	131	211	231	311	331
Index	Index	Index	Index	Index	Index
112	132	212	232	312	332
Index	Index	Index	Index	Index	Index
113	133	213	233	313	333
Index	Index	Index	Index	Index	Index
114	134	214	234	314	334
Index	Index	Index	Index	Index	Index
115	135	215	235	315	335
Index	Index	Index	Index	Index	Index
116	136	216	236	316	336

Sidecar 40 - #1		Sidecar 40 - #2		Sidecar 40 - #3	
Index 117	Index 137	Index 217	Index 237	Index 317	Index 337
Index 118	Index 138	Index 218	Index 238	Index 318	Index 338
Index 119	Index 139	Index 219	Index 239	Index 319	Index 339
Index 120	Index 140	Index 220	Index 240	Index 320	Index 340