

8x8 Contact Center

Release Notes

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What's new in the 8x8 Contact Center 8.4 release (with Unified Login and 8x8 Work)

In this release, 8x8 unites the customer service quality of 8x8 Contact Center with the global communication power of the 8x8 8x8 Work phone system. We introduce enhancements and new features that benefit agents, supervisors, and administrators. This release guide gives an overview of the features and helps you with the transition.

Audience

This release guide is for 8x8 Work and 8x8 Contact Center users who have access to 8x8 Unified Login, and discusses features and changes introduced in this release.

Features

Unified Login: This key feature in 8.4 benefits both administrators and agents. Unified login is the ability to log in to all 8x8 applications with a single username and password. For example, if you subscribe to multiple 8x8 services such as 8x8 Work, Switchboard Pro, 8x8 Analytics for Contact Center, etc., you can access all these applications with a unified login. Go to the unified login URL, <http://login.8x8.com>, and log in with your credentials. The Application Panel launches, showing all the 8x8 applications to which you have been granted access. You do not have to log in to each application separately, or remember complex login URLs.

For Administrators

Administrators who serve 8x8 Work and 8x8 Contact Center tenants have the following new and improved capabilities:

- **Ability to add 8x8 Contact Center agents:** Create **user profiles** in 8x8 Account Manager and assign agent capabilities to these users.

- **Ability to add 8x8 Contact Center administrators:** Assign administrator privileges to users to manage the contact center and/or PBX functionality.
- **Ability to assign 8x8 Contact Center dedicated extensions:** Use the hardware extensions dedicated to exclusively handle inbound and outbound call traffic for agents. They must be associated with a 8x8 Contact Center agent to receive, place, transfer, or make conference calls using the extension. Emergency services are not available with 8x8 Contact Center dedicated extensions.
- **Manage phone channels and manage phone scripts:** Using IVR scripts, define the inbound dialing experience for customers and direct them to a skilled agent quickly.
- **Enhanced 8x8 Contact Center dial plans:** Use dial plans that handle private PBX numbers in addition to full public numbers. Users are able to use system variables and create user variables.

For Agents and Supervisors

Agents and supervisors who serve 8x8 Work and 8x8 Contact Center tenants have the following benefits:

- **Shared Directory:** Provides a company directory for 8x8 Work and 8x8 Contact Center users. Directory entries are managed through Account Manager.
- **Shared Presence:** The presence status of 8x8 Contact Center agents and users in the 8x8 Work for Desktop and 8x8 Work for Mobile is shared in both 8x8 Agent Console and 8x8 Work client applications.
- **Assign Dedicated Extensions:** 8x8 Contact Center agents are assigned to dedicated desk phones that are meant to exclusively handle inbound and outbound call traffic for agents.
- **Extension-to-Extension Dialing:** Users can call extension users across 8x8 Contact Center and 8x8 Work using extension numbers. This release supports click-to-dial and call transfers between contact center agents and other users in the company. Agents can get insight from experts, or connect the customer and the expert directly.
- **Instant Messaging:** 8x8 Contact Center agents can chat with each other and with 8x8 Work for Desktop or 8x8 Work for Mobile users.
- **Call Parking:** Agents can park a call to be retrieved by another agent or an extension user who may be currently busy.
- **Improved Login Time for Agents:** The time it takes to log in to 8x8 Agent Console has been greatly improved.
- **Improved Chat Window Capacity:** We have increased the chat window capacity to 5000 characters.
- **Ability to Clone Tasks in Local CRM:** Agents can replicate tasks quickly with a click on the task form creating a new task.
- **Streamlined Access to 8x8 Analytics for Contact Center:** Supervisors and agents can now launch 8x8 8x8 Analytics for Contact Center from 8x8 Agent Console, eliminating the need for a separate login.

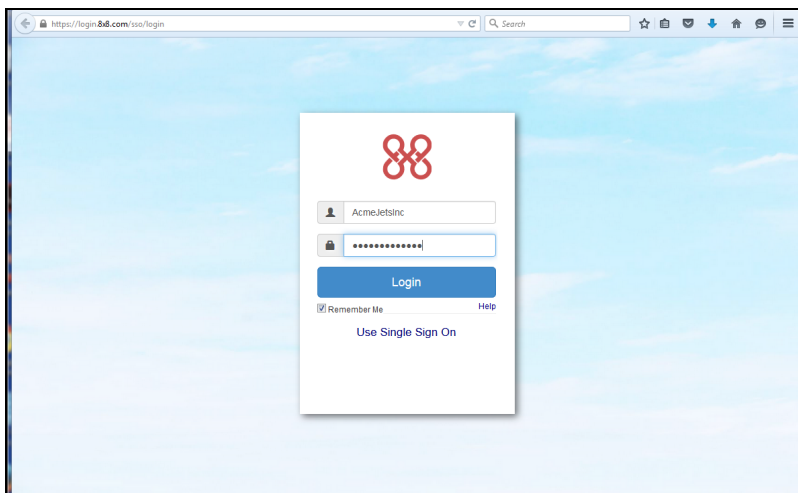
Known Issues

We have a few known issues that will be resolved in the upcoming release. For details, see [Known Issues in 8.4](#).

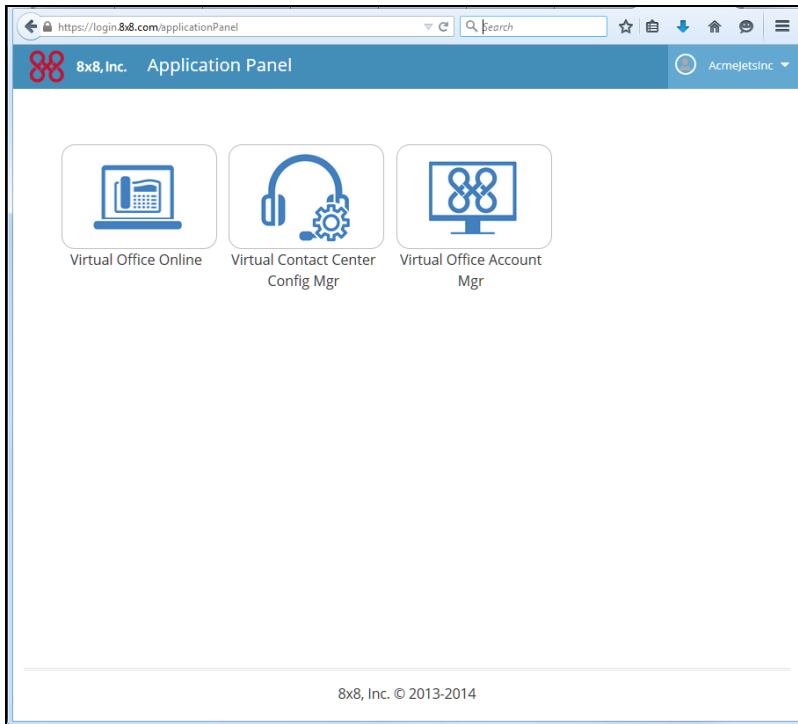
Unified Login (8x8 Work and 8x8 Contact Center users)

The 8x8 Work and 8x8 Contact Center integration offers 8x8 Work and 8x8 Contact Center administrators, 8x8 Contact Center agents, and 8x8 Work for Desktop users the ability to log in once and access all the 8x8 applications to which they have been granted access. This eliminates the need to log in to each application separately.

1. Go to <https://login.8x8.com/>
2. Enter your 8x8 username and password, and click **Login**.



The 8x8 application panel launches, showing all the 8x8 applications to which you have been granted access.



3. Select an application to launch.



Note: If you forgot your username or password, click **Help** to reset.

8x8 Work and 8x8 Contact Center Users

Users in 8x8 Contact Center are grouped into:

- **Agents:** Agents handle customer interactions channeled through the contact center. 8x8 Contact Center supports regular agents and supervisor agents. Supervisor agents have the ability to monitor agent activity and to adjust their participation in queues.
- **Administrators:** Administrators configure the contact center's resources and behavior. An administrator can be a Primary Administrator with unrestricted access to all configuration objects, or a Secondary Administrator with full or partial configuration rights.

Account Manager allows you to create **user profiles** and assign agent or administrator privileges to them for 8x8 Contact Center.

About User Profiles

In 8x8 Work and 8x8 Contact Center, creating user profiles and setting password policies are managed in Account Manager. A user profile is required to identify users with access to your 8x8 system. When creating a new user profile, the username must be globally unique. By default a user's email address is copied into the **User Name** field. If this email address is not unique within 8x8, or you wish to create a username of your own, you must choose a username that has never been used before. The system advises you if a duplicate exists at the time of creating the profile.

After creating a user profile, you can associate 8x8 services and general permissions to it. Typical assignments include physical and virtual extensions as well as 8x8 Contact Center agent or administrative privileges.

The following fields must be filled out to create a user profile:

- First Name
- Last Name

- Email Address
- Username (must be unique)

Create a New User Profile

First Name * Sarah
 Last Name * Thomas
 Nickname sthomas
 Email Address * sthomas@8x8.com
 Job Title Sales Associate
 Department Sales
 Location San Jose
 User Name * sthomas@8x8.com
 Salesforce ID
 Mobile

*Indicates Required Fields

1 Phone #'s linked to : Sarah Thomas [Sthomas@8x8.com]

VCC Agent ☐

Ext# Outside Phone# Calling Name Display Physical Extension VCC Agent Primary Extn Route #'s to VCC Channels

Add VCC Agent Extension Any Physical Extension selected to Route #'s to VCC Channels transforms into a VCC Dedicated Extension that requires a VCC Agent Login to function.

Save Save / Add Another Cancel



Note: When creating a new user profile, the username appears the same as the email address by default. The system administrator has the flexibility to change the username 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 [Create a User Profile](#) in Adding Agents. Follow the instructions below to create multiple user profiles.

To create multiple user profiles

1. Log in to Account Manager.
2. Go to the **Accounts** tab.
3. Select **User Profiles**.
4. Click **Download CSV Template**.

An Excel file that stores the user profile information is downloaded.

ACCOUNTS

User Profiles

Create and edit user profiles below. User Profiles are required to assign users to system tools and features including extensions, and to grant Account Manager privileges.

Customize View You can hide or show columns, and create additional customized fields by clicking Edit Viewable / Hidden Fields.

Search Reset View: All Active Disabled Create New User Profile Edit Viewable / Hidden Fields

Action	First Name	Last Name	Email Address
Edit Reset Password Disable Delete	Emily	Dickenson	emily@8x8.com
Edit Reset Password Disable Delete	Maya	Rudolph	maya@8x8.com
Edit Reset Password Disable Delete	Henry	Gill	henry@8x8.com
Edit Reset Password Disable Delete	Rae	Shasta	rae@8x8.com
Edit Reset Password Disable Delete	Sarah	Thomas	sthomas@8x8.com
Edit Reset Password Disable Delete	John	Smith	john@8x8.com

Create and edit multiple profiles at once by downloading the csv template, enter data in appropriate columns and then upload using the link to the right.

Download CSV Template Upload CSV Template

Profiles_acmegetinc_...csv Show all downloads...

5. **Save** the file to your computer's hard drive once you have made all your changes.



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

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

To change user profile password

1. Log in to Account Manager.
2. Go to **Accounts** tab.
3. Select **User Profiles**.
4. Find the agent from the list, and click **Reset Password**.

Account Manager
Company Name: AcmeJets Inc.
Welcome, John Smith | Sign Out
Email: nalin@8x8.com
Edit My Profile
Account: Business

HOME | PHONE SYSTEM | CONTACT CENTER | BILLING | REPORTING | ORDERS | **ACCOUNTS** | SUPPORT | VIRTUAL OFFICE ONLINE

Home > Accounts > User Profiles

ACCOUNTS

- > User Profiles
- > Privileges
- > Communication Preferences
- > Contact Directory
- > Password Policy

User Profiles
Create and edit user profiles below. User Profiles are required to assign users to system tools and features including extensions, and to grant Account Manager privileges.

Search | Reset | View: All | Active | Disabled | Create New User Profile | Edit Viewable / Hidden Fields

Action	First Name	Last Name	Nickname	Email Address
Edit Reset Password Disable Delete	Emily	Dickenson	Emily	naln@8x8.com
Edit Reset Password Disable Delete	Maya	Rudolph	Maya	naln@8x8.com
Edit Reset Password Disable Delete	Nancy	Gill		naln@8x8.com
Edit Reset Password Disable Delete	Rob	Shasta		marziah.fadasee@8x8.com
Edit Reset Password Disable Delete	Sarah	Thomas	stthomas	marziah.fadasee@8x8.com
Edit Reset Password Disable Delete	John	Smith	johny	naln@8x8.com

Create and edit multiple profiles at once by downloading the csv template, enter data in appropriate columns and then upload using the link to the right.

Download CSV Template | Upload CSV Template

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

Reset Password

An email with instructions on resetting the password will be sent to the below email address for the selected user profile.

User ID	EMILYD
Email Address	nalini@8x8.com

To change the password, click on the link provided in the email.

Send Email

Cancel

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

6. An email is sent to the email address indicated in the agent's in 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 at least one uppercase letter and one numeric digit. In the **Reset Password** window, hover over the question mark to see the requirements.

A screenshot of the 'New Password' form. A red arrow points to the link 'Required characters for password'. A text box is overlaid on the top right of the form, listing password requirements: 'Password should have', '- at least one uppercase letter,', '- at least one lowercase letter,', '- at least one numeric digit,', '- at least one special character from the set (+!@#\$%^&*~-=|_?<>~<)', '- minimum of 8 and maximum of 25 characters and', '- no white space.' Below this, it says 'Additionally, password should also be different from user name.'

Add Agents

The process of adding a 8x8 Contact Center agent involves two steps. Follow the procedure below to add a 8x8 Contact Center agent.

Step 1: Create a User Profile and Assign an Extension

If you have created users already, you can edit their user profiles in Account Manager to grant them 8x8 Contact Center agent privileges. Alternatively, you can create new user profiles for 8x8 Contact Center agents. Every agent must be assigned a primary agent extension number which can be dialed by 8x8 Work or 8x8 Contact Center users to call the agent. The extension number can be a virtual extension or a dedicated extension.

- **Virtual Extension:** This type of 8x8 Contact Center agent extension number is not associated with a physical 8x8 phone. The extension number is linked to one 8x8 Contact Center agent channel script.
- **Dedicated Extension:** If you select a dedicated extension, the extension and Direct-Inward-Dial (DID) numbers are permanently redirected to 8x8 Contact Center agent channels. The dedicated extension becomes a slave controlled exclusively by 8x8 Contact Center. You can control it only via the 8x8 Contact Center 8x8 Agent Console and the workplace phone setting. With a 8x8 Contact Center dedicated extension, the agent may be able to receive inbound calls (depending on the script) but cannot make outbound calls without logging in to 8x8 Contact Center as an agent or supervisor.



Note: A 8x8 Contact Center dedicated extension does not support E911 calls. With either 8x8 Contact Center extension type, anyone calling an agent's extension or DID number receives 8x8 Contact Center channel treatments as defined by the agent's channel script(s).

This extension number is displayed in the directory with presence.

Assigning a user a virtual extension

You must create a user profile first to assign a virtual extension to a user.

To create a user profile and assign a virtual extension:

1. Log in to Account Manager.
2. Go to the **Accounts** tab.
3. Select **User Profiles**.
4. Click **Create New User Profile**.

The screenshot shows the 8x8 Account Manager interface. At the top, there's a header with the 8x8 logo, company name 'AcmeJets Inc.', and user information 'Welcome, John Smith | Sign Out | Email: nalin@8x8.com | Edit My Profile'. Below the header is a navigation bar with tabs: HOME, PHONE SYSTEM, CONTACT CENTER, BILLING, REPORTING, ORDERS, ACCOUNTS (highlighted), SUPPORT, and VIRTUAL OFFICE ONLINE. Under the ACCOUNTS tab, there's a sub-menu with 'User Profiles' selected. The main content area is titled 'User Profiles' and contains a table of user profiles. The 'Create New User Profile' button is highlighted with a green box. Below the table, there are links for 'Download CSV Template' and 'Upload CSV Template'.

Action	First Name	Last Name	Nickname	Email Address
Edit Reset Password Disable Delete	Emily	Dickenson	Emily	emil@8x8.com
Edit Reset Password Disable Delete	Maya	Rudolph	Maya	may@8x8.com
Edit Reset Password Disable Delete	Nancy	Gill	Nancy	nanc@8x8.com
Edit Reset Password Disable Delete	Rob	Shasta	marqah.fadace@8x8.com	marqah.fadace@8x8.com
Edit Reset Password Disable Delete	Sarah	Thomas	sthom@8x8.com	sthom@8x8.com
Edit Reset Password Disable Delete	John	Smith	johny	john@8x8.com

5. Enter the user's first name, last name, and email address.

The username is populated as soon as you enter an email address. You can change the username, but it must be unique.

6. Select the **VCC Agent** check box to assign 8x8 Contact Center agent privileges to the user.

You must assign a primary extension number to the profile in the next step. This step is mandatory to save the user profile of a 8x8 Contact Center agent.

7. Click **Add VCC Agent Extension**.

The **Add Extension** window appears.

8. To assign a virtual extension to the agent, click  for the system to suggest an extension. You can only get a virtual extension using the auto suggest function. Click **Add**.

The virtual extension number becomes the agent's primary extension.

Create a New User Profile

First Name * John
 Last Name * Smith
 Nickname johnny
 Email Address * jsmith@8x8.com
 Job Title
 Department
 Location
 User Name * jsmith@8x8.com
 Salesforce ID
 Mobile

*=Indicates Required Fields

VCC Agent ☒

Extn#	Outside Phone#	Calling Name Display	Physical Extension	VCC Agent Primary Extn	Route #'s to VCC Channels
6007	N/A	N/A		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Add VCC Agent Extension Any Physical Extension selected to Route #'s to VCC Channels transforms into a VCC Dedicated Extension that requires a VCC Agent Login to function.

Save Save / Add Another Cancel

9. Click **Save**. The user profile is now saved with 8x8 Contact Center agent privileges and a Virtual Extension.

Assigning a dedicated extension to a user

In order to assign a dedicated extension to a user, you must complete two steps:

1. Assign a dedicated extension to a user profile.
2. Update the user profile with 8x8 Contact Center agent privileges.

To assign a dedicated extension to a user profile:

1. Go to the **Phone System** tab.
2. Click **View All Extensions**.
3. Select an available extension from the list, and click **Edit**.

8x8, Inc. Account Manager

Company Name: AcmeJets, Inc.
 Welcome, AcmeJets Inc. | Sign Out
 Email: nalin@8x8.com
 Edit My Profile

Account: Business

HOME | PHONE SYSTEM | CONTACT CENTER | BILLING | REPORTING | ORDERS | ACCOUNTS | SUPPORT | VIRTUAL OFFICE ONLINE

Home > Phone System > Manage Extensions

Manage Extensions

Below is an overview of all extensions. You may edit the extension details individually by clicking **Edit** next to each extension or as a group by clicking on **Edit Multiple**.

Actions	Status	Service Type	Ext	Phone Number	Caller ID First Name	Caller ID Last Name	Devices	Voicemail-to-Email Address
Edit (Activate Device)	Pending	Unlimited Extension	1001	(210) 500-1794	John	Smith	Polycom SoundPoint IP 335	naln@8x8.com
Edit	Active	Unlimited Extension	1002	(210) 500-1795	Rob	Shasta	Virtual Office Softphone	infadave@8x8.com
Edit	Active	Unlimited Extension	1003	(850) 000-0000	Suzy	Whitecorf	Virtual Office Softphone	suzyw@gmail.com
Edit	Active	Unlimited Extension	1004	(850) 000-0010	Harry	Potter	Virtual Office Softphone	naln@8x8.com
Edit	Active	Unlimited Extension	1005	(850) 000-0011	James	Madison	Virtual Office Softphone	jmad@8x8.com

The **Edit Extension** page opens.

- Click the **Select User Profile** link.

A window appears, showing all available user profiles.

- Find a user profile from the list, and click **Select**.
- Select the **VCC Dedicated Extension** check box.
- Click **Save Changes**. The extension number is now assigned to that user profile.



Note: You can also create a new user profile via **Phone System > View All Extensions > Create New User Profile**. However, we recommend you to create a user profile by going to **Accounts > User Profiles**, and then use the **Phone System** to assign a dedicated extension to the user profile.

If you selected an existing user who is not a 8x8 Contact Center agent, you must edit the agent's user profile to make the user a 8x8 Contact Center agent.

To update a user profile with 8x8 Contact Center agent privileges:

- Go to the **Accounts** tab.
- Select **User Profiles**.

- Search for the user assigned to a dedicated extension in the previous step. Click **Edit**.
You see the extension number show up in the profile.

HOME | PHONE SYSTEM | CONTACT CENTER | BILLING | REPORTING | ORDERS | ACCOUNTS | SUPPORT | VIRTUAL OFFICE ONLINE

Home > Accounts > User Profiles

ACCOUNTS

- > User Profiles
- > Privileges
- > Communication Preferences
- > Contact Directory
- > Single Sign On
- > Analytics Privileges
- > Password Policy

User Profiles

Create and edit user profiles below. User Profiles are required to assign users to system tools and features including extensions, and to grant Account Manager privileges.

Update User Profile

First Name * Rick
 Last Name * Steves
 Nickname
 Email Address * rick@8x8.com
 Job Title
 Department
 Location
 User Name * RICKSTEVES12
 Salesforce ID
 Zendesk ID
 NetSuite ID
 Mobile

*Indicates Required Fields

Phone #'s linked to : Rick Steves [nalini@8x8.com]

Ext#	Outside Phone#	Calling Name Display	Physical Extension	VCC Agent Primary Extn	Route #'s to VCC Channels
1001	14085967728	Rick Steves	Polycom VVX 400	<input type="radio"/>	<input type="checkbox"/>

[Add VCC Agent Extension](#) Any Physical Extension selected to Route #'s to VCC Channels transforms into a VCC Dedicated Extension that requires a VCC Agent Login to function.

Save Cancel

- Select the **VCC Agent** check box to assign the agent privileges to the user profile.
- Select the radio button under the **VCC Agent Primary Extn** column to designate this dedicated extension number as the primary extension number for the agent.

Update User Profile

First Name * Rick
 Last Name * Steves
 Nickname
 Email Address * nalini@8x8.com
 Job Title
 Department
 Location
 User Name * RICKSTEVES12
 Salesforce ID
 Zendesk ID
 NetSuite ID
 Mobile

*Indicates Required Fields

1

Phone #'s linked to : Rick Steves [nalini@8x8.com]

VCC Agent ☒

Ext#	Outside Phone#	Calling Name Display	Physical Extension	VCC Agent Primary Extn	Route #'s to VCC Channels
1001	14085967728	Rick Steves	Polycom VVX 400	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>

[Add VCC Agent Extension](#) Any Physical Extension selected to Route #'s to VCC Channels transforms into a VCC Dedicated Extension that requires a VCC Agent Login to function.

Save Cancel

- Click **Save**.

This extension user is now assigned agent privileges and a dedicated extension.


Step 2: Specify properties for users

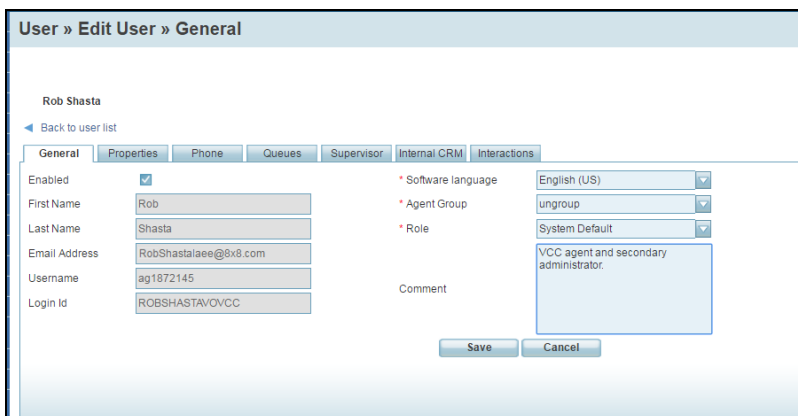
After you mark a user as a 8x8 Contact Center agent, you need to configure agent properties in the 8x8 Configuration Manager. Agents created in Account Manager are listed under **Users** in 8x8 Configuration Manager. A default group, called **ungroup**, is assigned to all agents. You can create a new group later and use it instead of the default group.

To configure user account properties:

1. Log in to 8x8 Configuration Manager.
2. Go to **Users**.

If you assigned the 8x8 Contact Center agent privileges to the user in Account Manager, the user shows up in the list.

3. Find the agent you added, and click  or **Edit**.



4. Open the **General** tab.



Note: The First Name, Last Name, Email Address, Username, Password, and Login ID fields are inherited from the user profile in Account Manager. You cannot edit them here.

5. Click the **Agent Group** drop-down list to change the agent's group. By default, the agent's group is **ungroup**. You can create agent groups by going to the **Groups** page in 8x8 Configuration Manager.
6. Click **Save**.
For configuration details, refer to [Add Users](#) in 8x8 Configuration Manager.

7. Go to the **Phone** tab.

User » Edit User » Phone

Rob Shasta

Back to user list

General Properties Phone Queues Supervisor Internal CRM Interactions

Workplace

Workplace phone: 3002

Workplace SIP URI: 3002

Allow agent to change workplace phone

Allow agent to change workplace SIP URI

Outbound Calling

Outbound Phone Codes: Default To Group [NONE]

Calling Line ID: 1408565026

Dial Plan: Tenant Default

* can be overridden by Outbound Phone Code

Agent Access #s and Voicemail

Primary Agent Directory #: 3002

Enable in IVR: ☒

Enable agent voicemail: ☐

Automatic Call Recording

% of inbound queue calls: 0

% of direct inbound calls: 0

% of outbound calls: 0

* can be overridden by IVR Voice recording settings

Agent's Recording Controls

Agent does not have recording controls: ☒

Agent is able to start recording: ☐

Agent is able to start and pause recording: ☐

* can be overridden by IVR Voice recording settings

Channels and Scripts linked to this Agent

Channel Name	Calling Name Display	Public Number	Script Name	Public No.	PBX#	Script Name	PBX Number
Agent DID script	Rob Shasta	16162029340	Agent DID script	3002		Agent Extension script	
Agent Extension script							

Save Cancel

8. Note that the agent's extension number appears in the **Workplace Phone** field when you first assign an extension to a user. Enter the agent's **Workplace phone** or **Workplace SIP URI** at which the agent wishes to be reached.
- OR

You may allow or prevent the agent to set this parameter later via 8x8 Agent Console. The workplace phone number can be set to any dedicated extension number or a DID number as needed. The workplace phone cannot be set to any channel numbers in the tenant except a 8x8 Contact Center dedicated extension number. The workplace SIP URI is used when the agent has a soft phone approved by 8x8 installed on their workstation.

9. Select the **Enable in IVR** check box if you wish this 8x8 Contact Center Agent extension number to be recognized in the IVR during a **Menu** or **Get Value** input operation.

Note that the **Primary Agent Directory Number** field is automatically populated with the agent's extension number.



Note: In the **Channels and Scripts linked to this Agent** table, for a dedicated extension such as 3002, both **Public Number** and **PBX Numbers** are populated. However, if the extension number is a virtual extension such as 6002, only the PBX number gets populated since there is no corresponding DID assigned to this extension number.

10. Click **Save**.

Add Administrators

When a 8x8 Contact Center order is placed, the Primary Administrator is created in both 8x8 Configuration Manager and Account Manager. The Primary Administrator is then marked with a yellow star in Account Manager Privileges. The

Primary Administrator has complete account access; other administrators cannot delete or revoke privileges from the Primary Administrator. However, you can create users in Account Manager and provide administrator privileges to them. These users become Secondary Administrator.

The process of adding a 8x8 Contact Center administrator involves three steps:

Step 1: Create a User Profile

You can create new user profiles and configure them as 8x8 Contact Center administrators. The administrators you create serve as Secondary Administrator.

To create a user profile:

1. Log in to Account Manager and go to the **Accounts** tab.
2. Select **User Profiles**.
3. Click **Create New User Profile** and enter the user information.

The username is populated as soon as you enter an email address, but can be edited. It must be unique to the PBX.

Create a New User Profile

First Name * John
 Last Name * Smith
 Nickname Johnny
 Email Address * johns@8x8.com
 Job Title agent
 Department Support
 Location
 User Name * johns@8x8.com
 Salesforce ID
 Mobile

*Indicates Required Fields

VCC Agent ☐

Ext'n# Outside Phone# Calling Name Display Physical Extension VCC Agent Primary Ext'n Route #'s to VCC Channels

Add VCC Agent Extension Any Physical Extension selected to Route #'s to VCC Channels transforms into a VCC Dedicated Extension that requires a VCC Agent Login to function.

Save Save / Add Another Cancel

4. Select the **VCC Agent** check box if you want the administrator to also serve as a 8x8 Contact Center agent. The new user then appears as both an agent and administrator under the **Users** tab in 8x8 Configuration Manager. If you only want to create a 8x8 Contact Center administrator, clear the **VCC Agent** check box.

5. Click **Save**.

The new user profile is created and listed under **User Profiles** in Account Manager. You now need to assign privileges to the new user.

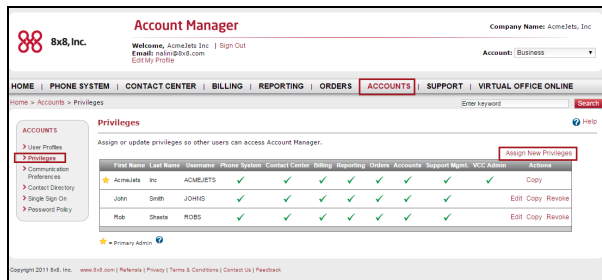
Step 2: Assign Privileges

You must assign or update privileges to grant the new users the 8x8 Contact Center administrator privileges. Assigning

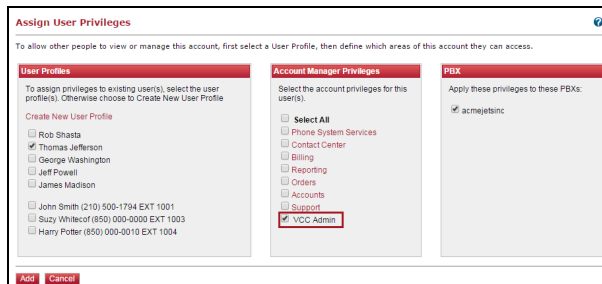
administrator privileges gives users the abilities of a Secondary Administrator.

To assign privileges to new administrators:

1. Log in to Account Manager.
2. Go to the **Accounts** tab.
3. Click **Privileges**.
4. Click **Assign New Privileges**.



5. Select the user profile you created in **Step 1**.



6. Select the **VCC Admin** privileges check box.
7. (Optional) select all **Account Manager Privileges**, or the ones that apply.
8. Select a **PBX** from the list if you have multiple PBXs.
9. Click **Add**.

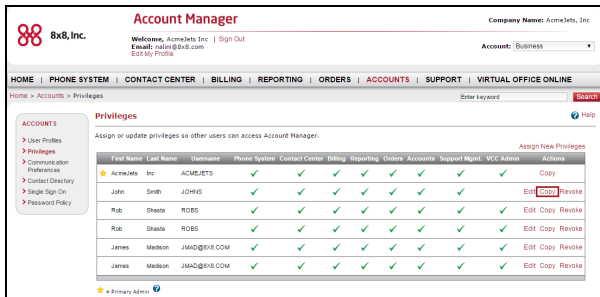
The new user is added to the 8x8 Configuration Manager administrators list.

You can use an existing user's profile as a template and copy the privileges for the new user.

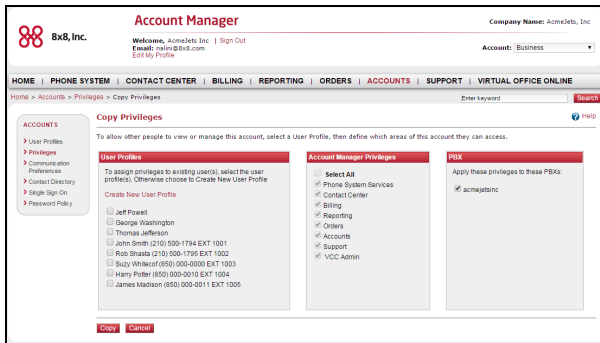
How do I copy privileges?

1. Log in to Account Manager.
2. Go to the **Privileges** tab.

3. Select a user profile you want to use as a template, and click **Copy**.



4. Select an existing user profile from the list that you want to copy the privileges to, or create a new one.




5. Click **Copy**.

Step 3: Specify Administrator Properties for Users

After assigning 8x8 Contact Center administrator privileges to a user profile in Account Manager, you can log in to 8x8 Configuration Manager to review and configure user properties. The new administrators are automatically assigned the System Default role in 8x8 Configuration Manager. The System Default role has viewing permissions by default. However, you can modify it by allowing other permissions such as **Write**, **Create**, and **Edit**.

To configure an administrator:

1. Log in to 8x8 Configuration Manager.
2. Go to the **Users**.

The new administrator appears under the admins list with a  next to it. The Secondary Administrator is indicated with (2).

3. Find the 8x8 Contact Center administrator you added, and click  or **Edit**.

The administrator's information such as name, email, login ID, workplace, and SIP phone appears.

The screenshot shows the 'User » Edit User » General' form in the 8x8 interface. The user being edited is Thomas Jefferson. The form includes a sidebar with navigation links (Home, Security, Groups, Users, Queues, Channels, Scripts, CRM, Support Center, Outbound Setup, Campaigns, Broadcast, Integration, Status Codes, Transaction Codes, Outbound Phone Codes, Wallboard, Chat design) and a top navigation bar with 'AcmeJets Inc (acmejetsinc01)', 'My Profile', 'Help', and 'Logout'. The form fields are as follows:

Thomas Jefferson		Back to user list	
General			
Enabled	<input checked="" type="checkbox"/>	* Software language	English (US)
First Name	Thomas	* Role	System Default
Last Name	Jefferson		Super User
Email Address	tomaj@8x8.com		VCC Agent
Username	ad221552		System Default
Login Id	TOMAJ@8X8.COM	Comment	
		Save	Cancel



Note: The First Name, Last Name, Email Address, Username, Password, and Login ID fields are inherited from the user profile in Account Manager. You cannot edit them here.

- The administrator is assigned to a default role called **System Default**. If you have created another role, select it from the drop-down list. You can create roles by going to **Security > Roles**. Refer to [Add a Role](#) for more details.
- Click **Save**.

For configuration details, refer to [Add Users](#) in 8x8 Configuration Manager.

Manage Phone Channels

A phone channel processes inbound phone interactions in a 8x8 Contact Center tenant. A tenant can have two types of phone channels:

- **Service channels:** A service channel is a regular phone channel associated with a telephone number. It is automatically created when a number is ordered for the tenant through provisioning. You can edit a service channel, and enable or disable it in 8x8 Configuration Manager. An IVR script is linked to the service channel by default.
- **Agent channels:** An agent channel is associated with 8x8 Contact Center agents and is automatically created when you create a 8x8 Contact Center agent in Account Manager. You can edit an agent channel, and enable or disable it in 8x8 Configuration Manager. A default IVR script is linked to the agent DID and agent PBX extension. The administrator can create a custom script and configure it for the agent. See [Phone Scripts](#) for more details about the two default agent scripts.

The screenshot shows the 'Channels > Channel list' page in the 8x8 Configuration Manager. The table lists various phone channels with columns for Status, Channel Name, Type, Linked to agent, Calling Name, Public Number, Script Name, and PBX #. Two channels are highlighted with red boxes and labels: 'Service Channel' and 'Agent Channel'.

Status	Channel Name	Type	Linked to agent	Calling Name	Public Number	Script Name	PBX #
enabled	14085965026	service	-	-	14085965026	Acme, Inc.	-
disabled	18557714472	service	-	-	18557714472	ivr script default	-
disabled	14087136753	service	-	-	14087136753	ivr script default	-
disabled	14087136754	service	-	-	14087136754	ivr script default	-
enabled	Shasta, Rob	agent	MARZ, FAD	Rob Shasta	18192029340	Agent DID script	3002

Both types of channels, Service and Agent, are listed under **Channels** in the 8x8 Configuration Manager. **Channels > Phone** provides the following information under the **Channel** list:

Phone Channel	Description
Status	Indicates if the channel is enabled.
Channel Name	Indicates the channel name.
Type	Indicates if this is a Service channel or an Agent channel.
Linked to Agent	Indicates if the channel is linked to a specific agent.
Calling Name Display	Refers to the Calling Name Display (CNAM) that is used when outbound calls use the associated public number as outgoing Calling Line ID (CLI).
Public Number	Indicates the external phone number or the Direct-Inward-Dial (DID) of the channel.
Script Name-Public Number	Indicates the IVR script associated with the agent's public number. It directs external callers to the agent's call-handling script.
PBX Number	This is the system-assigned number used for agent presence and internal calling to the agent. Channels linked to agents get a PBX number on migration. Adding and linking a new channel to an agent, adds the PBX number to the channel.
Script Name-PBX Number	Indicates the IVR script associated with an agent's PBX number. Internal calls to this agent's PBX number receives this script treatment.

Manage Phone Scripts

Phone scripts are now grouped under the Phone tab in 8x8 Configuration Manager. Other IVR scripts, such as chat and email scripts, also appear under their own tabs: Chat and Email. Moreover, two new default scripts are introduced that allow direct agent routing from a public telephone number and agent's extension number. These default scripts can be edited by administrators:

- **Agent DID script:** A default script for an agent's public number. This script directs external callers to agents who are assigned to the channels.
- **Agent Extension Script:** A default script for an agent PBX or extension number. This script supports **extension-to-extension dialing**.

You can choose the above scripts as your tenant's default for an agent's DID and extension numbers.

To select a default script for direct agent routing

1. Go to 8x8 Configuration Manager.
2. Go to **Scripts > Phone**.
3. Select the default radio buttons for the agent DID or extension script.
4. Click **Save**.

The selected scripts become the tenant's default. The next time you create a new 8x8 Contact Center agent in Account Manager, the default DID or extension script is automatically assigned to the agent. Alternatively, you can modify and save the agent's default script per your tenant's requirements.


Script name	Enabled	Category	Last modified	Comments	Default for DID	Default for Extension
Agent DID script	yes		12/04/2015 10:00:31			
Agent Extension script	yes		12/04/2015 10:00:31			
ivr script default	yes		12/04/2015 10:00:31	Migrated to script default		
Steve Demo	yes		12/16/2015 14:42:21			
Modified agent default DID script	yes		12/29/2015 10:46:04			
Modified agent default ext script	yes		12/29/2015 10:47:36			

You can always view or change the assigned scripts for the new agent under the **Users** tab.



Note: **ivr script default** is not an agent routing script, but a default script for **Service Channel**.

To view or change an agent's phone script

1. Go to 8x8 Configuration Manager.
2. Go to **Users**.
3. Locate the user and click .
4. Open the **Phone** tab.
5. The tenant's default scripts appear under the **Public Number** and **PBX Number** boxes.

Channel Name	Calling Name Display	Public Number	Script Name - Public Number	Script Name - PBX Number
Admin Pubs	Admin Pubs	14207080163	Agent DID script	Agent Extension script

If you have created another phone script, you can change the agent's assigned scripts here. Refer to 8x8 Configuration Manager to learn how to create new phone scripts.

6. Click the default script name for an agent. A drop-down menu appears.
7. Choose another script from the menu.
8. Click **Save**.
The new scripts are now in effect for the agent.

Enhanced Dial Plans

8x8 Contact Center dial plans now handle private PBX numbers in addition to full public numbers. New system dial plans are equivalent to prior system dial plans with added support for PBX number dialing. In the new system dial plans, the International Numbering Plan (ITU-T E.164) no longer allows unfiltered pass-through dialing. Dial plans take numbers dialed by users, or numbers originating from other 8x8 Contact Center components, IVR callback, web callback, click-to-dial, workplace phone, etc., and apply editing rules to yield one of the following:

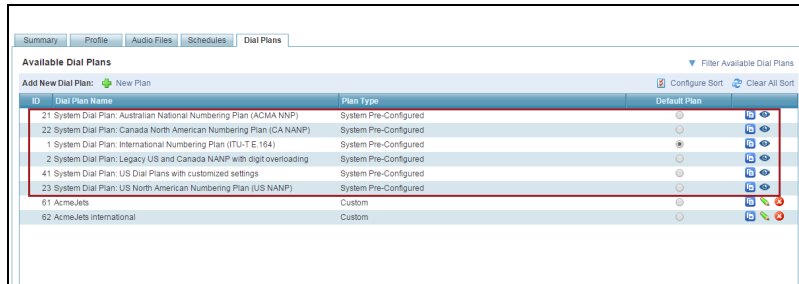
- A valid global public phone number (known as E.164)
- A valid PBX number
- A call disallowed message number
- A warning tone generating number

Features


- Ability to **change the order of the rules** by dragging and dropping
- Ability to use private PBX numbers
- Ability to use **system variables** and **user-defined variables**
- Dial plan editing results are no longer automatically prefixed with a plus (+) sign

Built-in system dial plan rules

A set of new system dial plan rules are designed for 8x8 Work and 8x8 Contact Center tenants. Users cannot edit the system default dial plans, but they can copy a rule and edit it based on their needs.



To copy a system pre-configured rule:

1. Log in to 8x8 Configuration Manager.
2. Go to the **Home** page.
3. Go to the **Dial Plans** tab.
4. Click  next to a default system rule that you wish to modify.
A message appears asking you to click **Save** to keep a copy.
5. Click **OK**.

The dial plan creates a copy of the default plan.

6. Enter a new name for the **Dial Plan**.
7. Click **Save**.

A copy of the default dial plan is created and added to the list of available dial plans. You can modify the new dial plan according to your tenant needs.

System variables

In 8x8 Work and 8x8 Contact Center, a set of new variables are introduced in dial plan:

System Variable	Used for
\$PBXID	VOPBX ID/Name
\$TENANT	Tenant name
\$AGENTLOGIN	Agent username if available for the call
\$ORIGINNUMBER	Original dialed number

For example, using \$PBXID variable in your dial plan rule allows you to call any extensions in the PBX that has seven digits or less:

Dialed String Match Pattern	Rewrite Translation	Rule Comment
^[0-9]{1,7}\$	\$1-\$PBXID	Send 7 digits or less to the host PBX of tenant



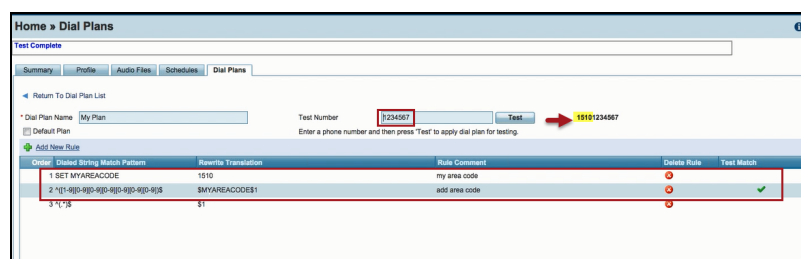
Note: The E.164 system dial plan is no longer a pass-through. A new rule is added to validate the dialing number.

User variables

Users can create variables based on their specific needs.

For example, a user defines *SET MYAREACODE* variable below for his area code. When he enters a telephone number, the system dials the area code (1510) first and then dials the number.

Dialed String Match Pattern	Rewrite Translation	Rule Comment
SET MYAREACODE	1510	my area code
^([1-9][0-9][0-9][0-9][0-9][0-9])\$	\$MYAREACODE\$1	add area code



To see what dial plan rule is currently applied to your tenant

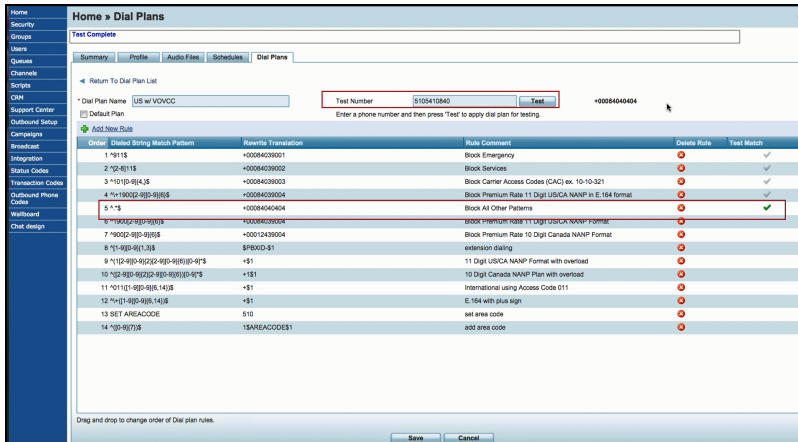
1. Log in to 8x8 Configuration Manager.
2. Go to **Home**.
3. Go to the **Dial Plans** tab.



4. Click  or **Edit** to open the rules.

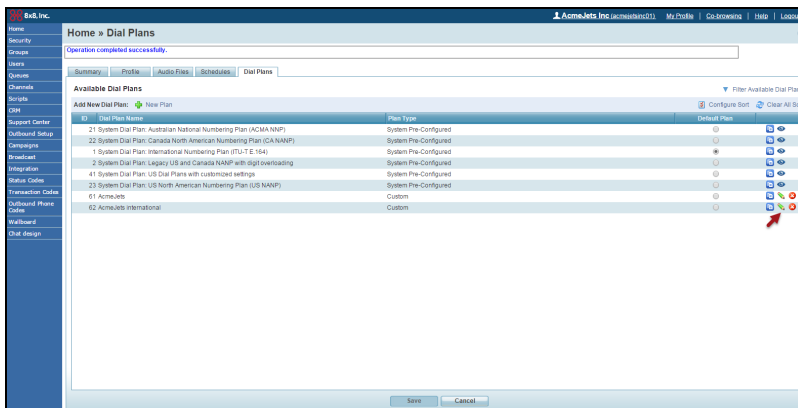
5. Enter a number in the **Test Number** text box and click **Test**.

A green check mark appears next to the dial plan rule that is applied in your tenant.



How do I change the order of my custom rules?

1. Log in to 8x8 Configuration Manager.
2. Go to the **Home** page.
3. Go to the **Dial Plans** tab.



4. Click  or **Edit** to open a rule.

5. Click to select the custom rule and drag it to the desired location.

The screenshot shows the 'Dial Plans' configuration page. At the top, there are tabs for 'Summary', 'Profile', 'Auto Files', 'Schedules', and 'Dial Plans'. Below the tabs, there's a 'Return To Dial Plan List' link and a 'Dial Plan Name' field set to 'AcmeJax International'. A 'Test Number' field and a 'Test' button are also present. A table lists several rules with columns for 'Order', 'Default String Match Pattern', 'Rewrite Transmission', 'Rule Comment', 'Delete Rule', and 'Test Match'. A red arrow points from the 'Delete Rule' column of the rule with Order 4 to the 'Delete Rule' column of the rule with Order 5, indicating a drag-and-drop action.

Order	Default String Match Pattern	Rewrite Transmission	Rule Comment	Delete Rule	Test Match
1	*911\$	+0084039001	Block Emergency		
2	*0401\$	+0084039002	Block Services		
3	*1010-99-99\$	+0084039003	Block Carrier Access Codes (CAC) ex. 10-10-321		
4	*110000-99-99\$	+0084039004	Block Premium Rate 11 Digit US NANP in E-164 format		
5	*110000-99-99\$	+0084039004	Block Premium Rate 11 Digit US NANP Format		
6	*110101-99-99\$	+81	11 Digit US NANP Format		
7	*110101-99-99\$	+81	International using Access Code 011		
8	*110101-99-99\$	+81	International using Access Code 011		
9	*11\$	+0084040404	Block All Other Patterns		

6. Click **Save**.



Note: You cannot edit system dial plans.

Backward Compatibility

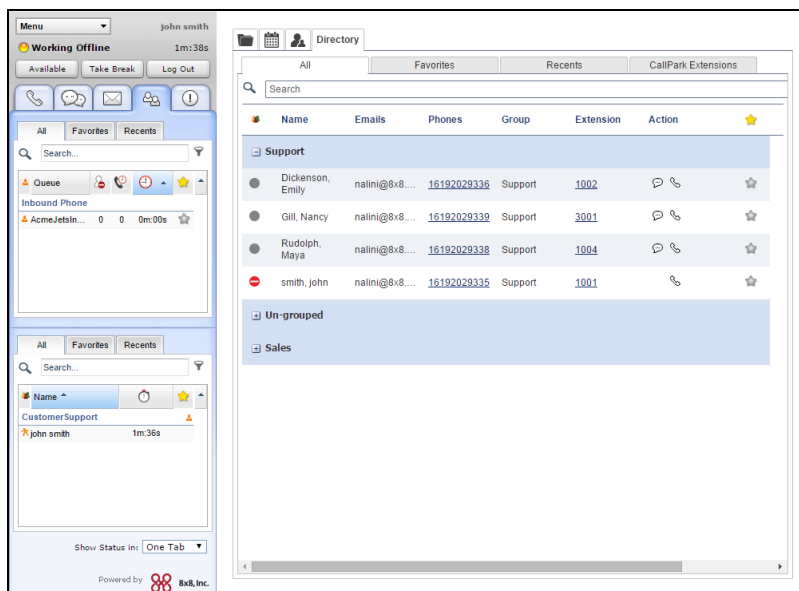
- All prior dial plans are automatically adjusted to compensate for the plus (+) sign change.
- The original International Numbering Plan (ITU-T E. 164) allowed any digit sequence starting with a plus (+) sign to pass through without any digit modifications. The updated equivalent dial plan now includes E. 164 number validity checks along with some special and premium number blocking. In some cases, users of this plan may experience a change of behavior if their customary dialing included non-E. 164 number patterns.

Functioning as a 8x8 Contact Center Agent

With 8x8 Work and 8x8 Contact Center Integration, 8x8 Contact Center agents have the following benefits:

Shared Directory

From 8x8 Agent Console, access the company directory that lists all extension users including 8x8 Contact Center agents. Communicating with these users is just a click away.



Shared Presence

Check the status of other extension users before contacting them. The **Directory** tab in 8x8 Agent Console lists all extension users with their status set in a 8x8 Work client application. Similarly, you can view the status of agents or other extension users from the 8x8 Work for Desktop or 8x8 Work for Mobile.



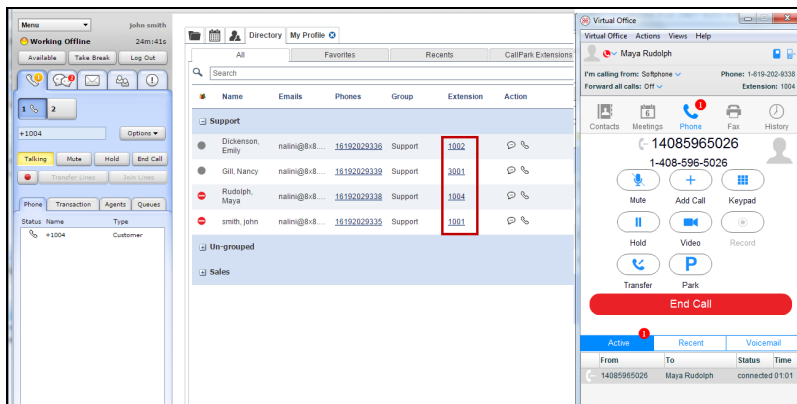
Note: The status shown in the Directory tab in 8x8 Agent Console is retrieved from 8x8 Work applications and not from 8x8 Agent Console.

Extension-to-Extension Dialing

Click to call another extension user using their extension numbers from the directory in 8x8 Agent Console. You need the active **dial plan** to be able to make the private PBX number calls. If your company is using a custom dial plan, you need to modify it by copying the rules from the 8x8 default dial plan to support extension-to-extension dialing.

The following call flows are available for extension-to-extension dialing:

- 8x8 Work user to another 8x8 Work user
- 8x8 Work user to a 8x8 Contact Center user
- 8x8 Contact Center user to a 8x8 Work user
- 8x8 Contact Center user to another 8x8 Contact Center user



You can also use instant messaging to chat.

Dedicated Extension

Handle call center traffic via a dedicated desk phone. 8x8 Contact Center agents can now be assigned a dedicated desk phone. These dedicated extensions are meant exclusively to handle inbound and outbound call traffic for agents. You cannot receive, place, transfer, or make conference calls using the extension by itself. This helps in tracking and monitoring contact center traffic.



Note: 8x8 Contact Center dedicated extensions do not support calling emergency services.

Call Parking

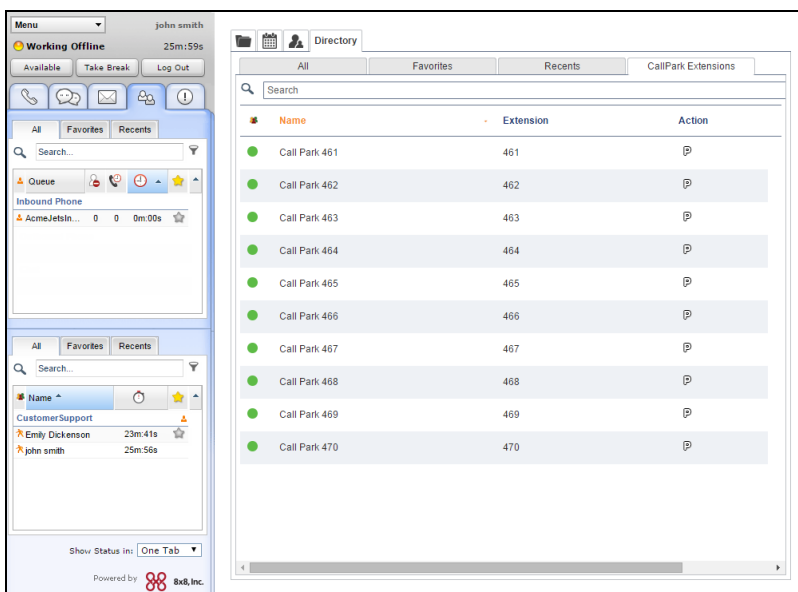
Connect the customer with the right skilled agent using Call Parking. Call Parking allows agents to park a call to be retrieved by another agent or an extension user who may be currently busy. When the agent parks a live call on an available parking extension, the caller hears hold music. The agent can then inform the other agent or extension user about the parked call and the parking extension number via chat. The other user can retrieve the call by clicking on the parked extension.



Note: A call that is parked longer than five minutes is offered back to the same agent who parked the call.

To park a call:

1. During a live call, go to the **Directory** tab in 8x8 Agent Console.
2. Go to the **CallPark Extensions** tab.



3. From the list of call parking extensions, select an available extension.
The status of call parking extension is indicated by green (available) or red (busy). You can only park one call per extension.
4. Inform the other agent or extension user about the parked call via chat.

To retrieve a parked call:

1. Go to the **Directory > CallPark Extensions** tab.
2. Accept the call by clicking on **P**, or dial the parked extension number to retrieve the call.

Directory

My Profile




All

Favorites

Recents

CallPark Extensions

Search

	Name	Extension	Action
	Call Park 461	461	
	Call Park 462	462	
	Call Park 463	463	

Added Features and Enhancements

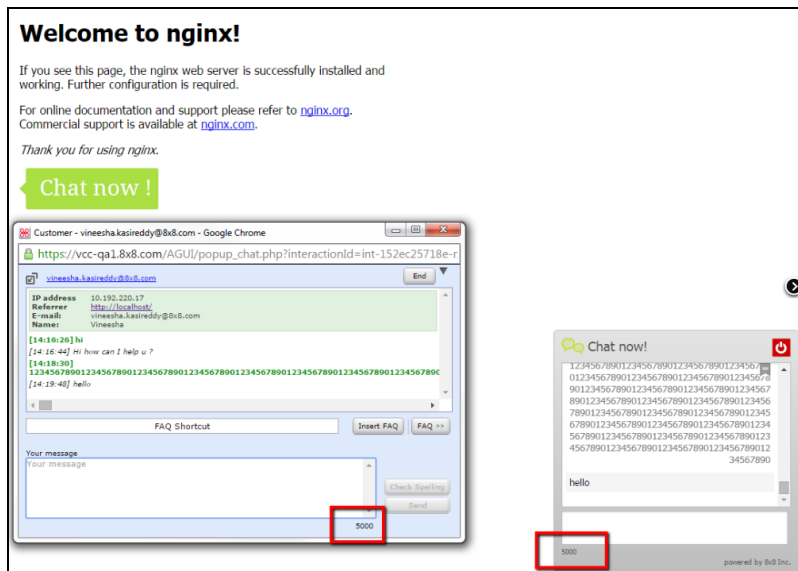
In this release, we have made the following improvements and enhancements for agents and supervisors:

Improved login time for agents

The time it takes to log in to 8x8 Agent Console has been greatly improved in this release.

Improved chat window capacity

We have increased the chat window capacity to 5000 characters. This enhancement allows users to communicate large bodies of text, such as FAQs, via the chat window. For details, refer to the 8x8 Agent Console Guide to learn about [Chat Interactions](#).





Note: Chat interactions via Support Center are limited to 500 characters on the customer side.

Ability to clone tasks in Local CRM

In 8x8 Agent Console with the ability to clone tasks, agents can replicate tasks quickly with a click on the task form. The new feature allows agents to clone a task creating a new task ID and associate each cloned task ID with the same original inbound transaction ID.

Features

- If an agent tries to delete a parent task, a warning is shown to inform the user that the parent task and its information are being permanently deleted.
- Only one parent level is allowed for each cloning task.
- Transaction ID is cloned, but a new task ID is generated every time you clone.
- A new task ID is created and all field values in the task form are cloned except history, date and time created, and last modified date.
- The parent task shows all tasks being cloned from the parent listed under the **History** tab.
- The child task shows a link to the original task, and next to the task number.
- If a parent task is deleted, the child task shows the parent task in the history, but the link to the parent task is removed from the top.
- The agent can only see the clone button if the administrator has enabled the agent to edit and create tasks under **Users > Internal CRM** in 8x8 Configuration Manager.

Use Case

The receptionist at a dental clinic uses tasks to create appointments. Once he creates an appointment for a family member through a task, he can copy the task to create appointments for the rest of the family. Using the clone feature, agents can increase their efficiency, eliminate manual work of entering data, and speed up the process.

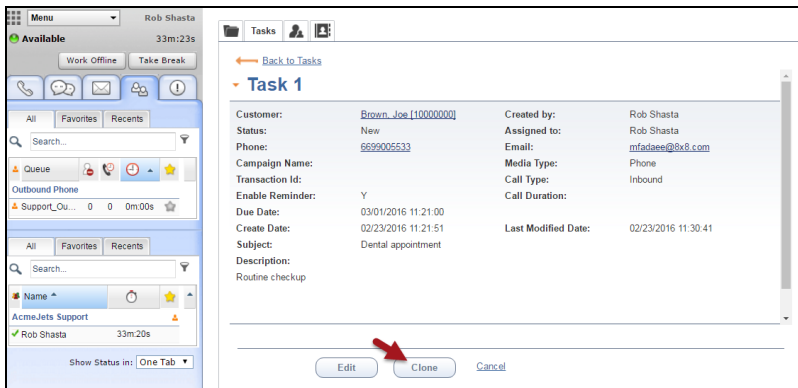
The history entry of the cloned task shows:

- The date and time the task was created.
- The agent who created the task.
- If the task is a cloned task.
- Description such as the parent task number.

Within an individual task, a **Clone** button is introduced. Click the button to clone the task.

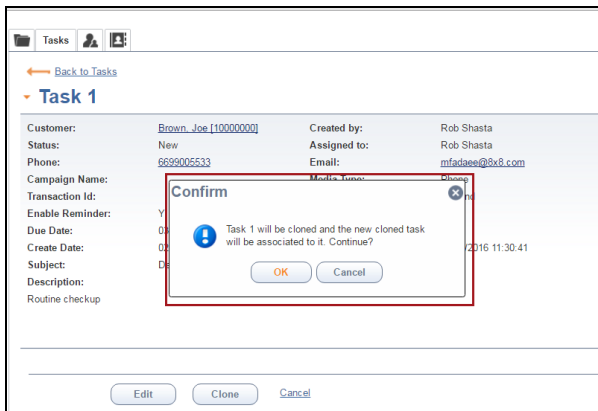
To clone a task:

1. In the 8x8 Agent Console, click the **Tasks** tab.
A list of your open tasks appears.
2. Open an existing task from the list.



Note: If you wish to create a new task, you need to save it first before being able to clone.

3. Click the **Clone** button.
A confirmation window pops up.



4. Click **OK** to confirm cloning.
The edit task page opens with the information already populated.
Note that the task number indicates it is cloned from another task.
5. Click **Save**.
The cloned task appears in the list.

The new task shows the link to the original task.

[Back to Tasks](#)

Task 2 Cloned from Task 1

Customer: New
 Status: New
 Phone: 6099005533
 Campaign Name:
 Transaction Id:
 Enable Reminder: Y
 Due Date: 03/01/2016 11:21:00
 Create Date: 02/23/2016 11:23:36
 Subject: Dental appointment
 Description: Routine checkup

Created by: Rob Shasta
 Assigned to: Rob Shasta
 Email: mshasta@8x8.com
 Media Type: Phone
 Call Type: Inbound
 Call Durations:
 Last Modified Date: 02/23/2016 11:28:32

History History 1 - 2 of 2

Create Date	Create Agent	Activity	Description
02/23/2016 11:31:11	Rob Shasta	Clone Task	Clone Task 3 created
02/23/2016 11:23:36	Rob Shasta	Clone Task	Task cloned from Task 1

[Switch to unitary view](#)

[Delete](#) [Edit](#) [Clone](#) [Cancel](#)

Note: Deleting a task or a cloned task is available to agents only if they are granted the right privileges. Your confirmation is required to delete a parent task with a cloned child.

Tasks

Search tasks: My Open Tasks [Go](#) [Search](#)

Tasks 1 - 5 of 6

#	Subject	Status	Due Date	Last Modified Date	Action
5	Dental appointment	Open	2016 12:17:02	2016 12:17:02	View Edit Delete
4	Dental appointment	Open	2016 11:57:03	2016 11:57:03	View Edit Delete
3	Dental appointment	Open	2016 11:31:11	2016 11:31:11	View Edit Delete
2	Dental appointment	Open	2016 11:28:32	2016 11:28:32	View Edit Delete
1	Dental appointment	Open	2016 11:30:41	2016 11:30:41	View Edit Delete

[Delete Selected](#) [Delete All](#)

Confirm

Task information will be permanently deleted and no longer be available. This task is parent of Task 3.


[OK](#) [Cancel](#)

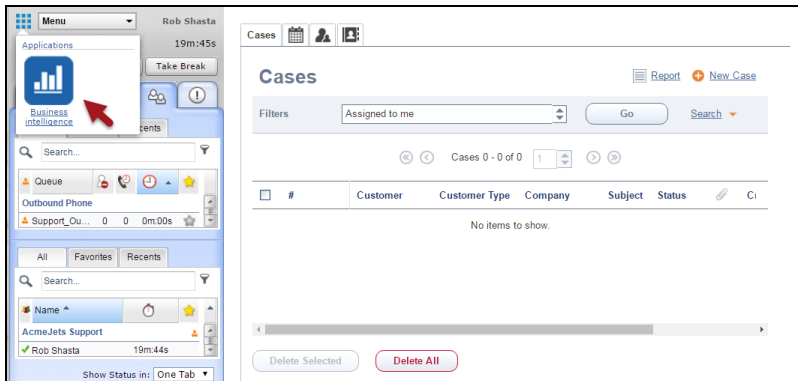
Streamlined access to 8x8 Analytics for Contact Center

Supervisors can now launch 8x8 Analytics for Contact Center from 8x8 Agent Console, eliminating the need for a separate login. 8x8 Analytics for Contact Center provides industry-leading insights about the performance of your contact center. It is more than just data. It brings powerful graphical tools that reveal actionable business information. 8x8 Analytics for Contact Center goes beyond traditional call center reporting. You can track the performance of your agents and contact center, and see how your customers are being served across all channels.

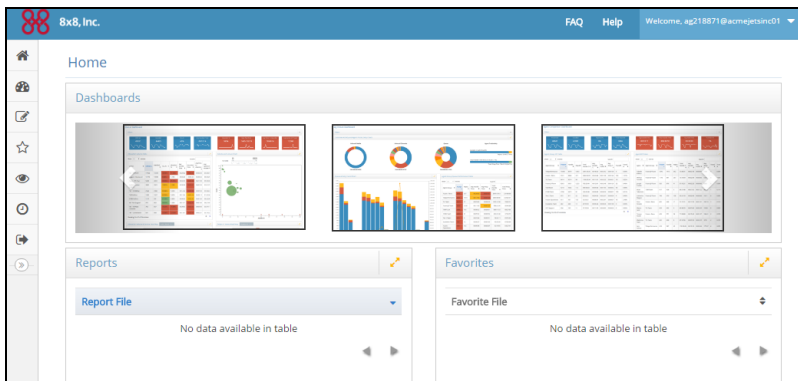
To access 8x8 Analytics for Contact Center:

1. Log in to 8x8 Agent Console.

2. Click  next to the drop-down menu.



3. Click **Business Intelligence** to launch the 8x8 Analytics for Contact Center tool.
The dashboard launches in a separate browser window.



4. Use the navigation menu on the left to access dashboards and create custom reports.
For more information on the capabilities of this tool, refer to the [8x8 Analytics for Contact Center Guide](#).

Bug fixes 8.4

The following bugs are fixed in this release.

Bug	Summary	Comment
VFIX-1575	Tomcat server stops responding.	Fixed Tomcat pool connection issues for memory leak.
VFIX-1371	Selected transactions codes shows as N/A in historical reporting when an agent transfers a transaction to another agent.	Transaction code is now recorded for all legs of a multi-leg call in historical reporting. The transaction codes selected by agent A is recorded. When a call is transferred, the codes selected by the agent are populated in the historical report.
VCC-9992	In Quality Rocket management application recording files not found.	Added a new event to SAPI. The Quality Rocket management application can easily locate recording files on 8x8 Contact Center servers.

Known issues 8.4

We have identified the following known issues in 8.4. Look for resolutions for these issues in the upcoming releases:

Issue	Comment
Agent-to-Agent Dialing	The new and improved methods of agent-to-agent dialing are not implemented in this release. Dialing the extension number from the shared directory and from the telephone field in the Control Panel will be supported in the upcoming release. We continue to support agent-to-agent dialing via the Agents tab in the Control Panel.
Agent DID Call Routing	Incoming calls for agent PBX number and DID number always get mapped to the IVR script assigned to the PBX number. If you have specified separate treatments for customer-to-agent dialing and agent-to-agent dialing, the PBX number script overrides the existing DID number script.
Warning for Emergency Calling	8x8 Contact Center dedicated extensions do not allow outbound calling and hence do not support calling the emergency services. On going off-hook, these devices currently do not hear a warning message.



Note: Please notify agents using dedicated extensions that emergency calling is not supported on these devices.