

# 8x8 Account Manager

Administrator Guide for Virtual Contact Center



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## 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
<ul style="list-style-type: none"><li>■ Firefox</li><li>■ Google Chrome</li><li>■ Internet Explorer 11</li><li>■ Opera</li><li>■ Safari</li></ul>	<ul style="list-style-type: none"><li>■ Firefox</li><li>■ Google Chrome</li><li>■ Safari</li></ul>	<ul style="list-style-type: none"><li>■ Firefox</li><li>■ Google Chrome</li><li>■ Opera</li></ul>

### Required Firewall Ports

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

### Minimum System Requirements

Windows XP	Windows 7 and Vista	Mac
<ul style="list-style-type: none"><li>■ Pentium 4 1.3 GHz/AMD Athlon XP 1500+ or newer</li><li>■ 512 MB of RAM</li></ul>	<ul style="list-style-type: none"><li>■ Pentium 4 1.3 GHz/AMD Athlon XP 1500+ or newer</li><li>■ 1 GB of RAM</li></ul>	<ul style="list-style-type: none"><li>■ Powercomputer G4/G5 or newer</li><li>■ 512 MB of RAM</li></ul>

### 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**.

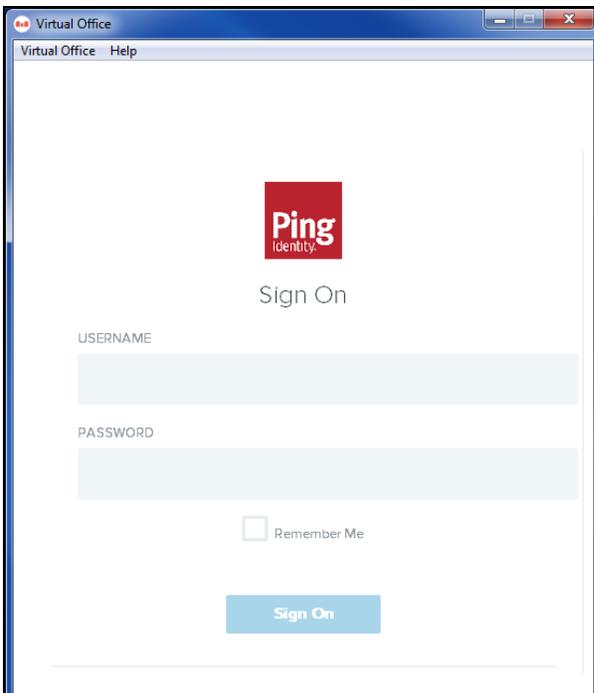
The SSO login prompt opens.

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.



The screenshot shows a browser window titled "Virtual Office" with a menu bar containing "Virtual Office" and "Help". The main content area displays the Ping Identity logo (a red square with "Ping" in white and "Identity" in smaller text below it) and the text "Sign On". Below this, there are two input fields: "USERNAME" and "PASSWORD". Under the "PASSWORD" field is a checkbox labeled "Remember Me". At the bottom of the form is a blue "Sign On" button.



**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.

**8x8** Global Cloud Communications  
 Account Manager  
 Company Name: Specialty Cookies | Main Number: (556) 054-7455  
 Welcome, Sarah Thomas | Sign Out  
 Email: sliu@8x8.com  
 Edit My Profile  
 Account: Business

HOME | PHONE SYSTEM | BILLING | REPORTING | ORDERS | ACCOUNTS | SUPPORT | VIRTUAL OFFICE ONLINE  
 Home > Edit Profile Information

### Edit Profile Information

**Name**

First Name: Sarah  
 Last Name: Thomas

**Password**

User ID: specialtycookies  
 New Password: [input]  
 Confirm New Password: [input]

**Single Sign On**

Federation ID: PHILLIPL@GMAIL.COM

**Password Hint**

The password hint is associated with your primary email address.  
 Current Password Hint Question: [input]  
 Current Password Hint Answer: [input]  
 New Password Hint Question: [input]  
 New Password Hint Answer: [input]

**Contact Information**

Primary	Email Address	Email Type
<input type="radio"/>	sbeckmann@SpecialtyCookies.com	Business
<input type="radio"/>	sjarud@8x8.com	Business

Primary	Country Code	Phone Number	Extension	Phone Type
<input type="radio"/>		18508483008		Business
<input type="radio"/>		4088457878		Main

**Pass Phrase**

Due to FCC CPNI requirements, customers must provide a Pass Phrase when calling 8x8 for access to calls logs, call detail records and billing information. It will also be needed to make any changes by phone to the email address associated with the profile.  
 User ID: specialtycookies  
 Pass Phrase: apipass123  
 Must be alphanumeric & at least 3 characters long.

**Language**

Language: Japanese

**Time Zone**

Time Zone: US/Eastern

**Communication Preferences**

8x8 e-newsletters  
 Helpful tips with information on the latest news and features.  
 Product and promotion emails  
 Emails about new products, special discounts and offers.  
 Monthly bill notification  
 Email me when my monthly bill is available for viewing.  
 8x8 satisfaction surveys and product trial  
 Invite me to give feedback and try new products.

Users can update their communication preferences in their Virtual Office Online Account.  
 Note: 8x8 reserves the right to contact you regarding service, feature or policy announcements and information about your account.

Save Cancel

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.

The screenshot shows the Account Manager home page with a navigation bar at the top containing: HOME | PHONE SYSTEM | BILLING | REPORTING | ACCOUNTS | SUPPORT | VIRTUAL OFFICE ONLINE. A search bar is located on the right side of the navigation bar.

The main content area is divided into several sections:

- Call Log Summary:** Includes a "Select Time Frame" dropdown menu and a "View Call Logs" button.
- Billing Summary:** Displays "Status: Current", "Payment Amount: \$0.00", and "Next Payment Due: 03-02-2017". It also includes links for "View Statements" and "Update Billing Profile".
- Phone System Setup:** Lists options such as "Setup Features", "Contact Directory", "View User Profiles", "View Privileges", "Installation Appointment(s)", and "Download Activation Codes".
- Account Updates:** Shows "Order Status" with a "View All" link and a list of order IDs: "AO0300042939 - Not Shipped | SA10004182 - Not Shipped | AO0300042346 - Not Shipped | More...". Below this, it displays "8x8 Network Alerts" with a "Support" link and the message: "All systems and networks are currently functioning at 100%".
- How Do I?:** A grid of links for various help topics, including "How do I set up holiday hours and greetings?", "How do I change the Call Forwarding rules for an extension?", "How do I change my Auto Attendant greetings?", "How do I set up my phone extensions for the first time?", "How do I set up Virtual Office Online accounts?", "How do I set up Virtual Office Mobile on my cell phone?", "How do I check the status of a phone number transfer request?", "How do I change...", "How do I make...", "How do I set up...", "How do I change...", "How do I view...", and "How do I pay m...".
- YOUR QUESTION:** A text input field with the placeholder "Type your question here" and a "Send to our experts" button.
- Get off to a quick start!** A promotional banner with the text "Watch this quick video to learn how you can get your services up and running quickly!" and a "WATCH >" button.
- Empower your users with 8x8 Virtual Office Mobile:** A banner for the mobile app, featuring "Get it on Google play" and "Available on the App Store" buttons.

### 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 screenshot shows two drop-down menus:

- Account:** A dropdown menu with "Business" selected.
- Phone System Name:** A dropdown menu with "Specialty Cookies" selected.

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

<p><b>Call Log Summary</b></p>  <p>Select Time Frame ▾</p> <p><a href="#">View Call Logs</a></p>	<p><b>Billing Summary</b></p>  <p>Status: Demo/Trial            Payment Amount: \$212.93            Next Payment Due: 05-02-2016</p> <p><a href="#">View Statements</a>  <a href="#">Update Billing Profile</a></p>	<p><b>Phone System Setup</b></p>  <p><a href="#">Setup Features</a>  <a href="#">Contact Directory</a>  <a href="#">View User Profiles</a>  <a href="#">View Privileges</a>  <a href="#">Installation Appointment(s)</a>  <a href="#">Download Activation Codes</a></p>
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## Billing Summary

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

<p><b>Call Log Summary</b></p>  <p>Select Time Frame ▾</p> <p><a href="#">View Call Logs</a></p>	<p><b>Billing Summary</b></p>  <p>Status: Demo/Trial            Payment Amount: \$212.93            Next Payment Due: 05-02-2016</p> <p><a href="#">View Statements</a>  <a href="#">Update Billing Profile</a></p>	<p><b>Phone System Setup</b></p>  <p><a href="#">Setup Features</a>  <a href="#">Contact Directory</a>  <a href="#">View User Profiles</a>  <a href="#">View Privileges</a>  <a href="#">Installation Appointment(s)</a>  <a href="#">Download Activation Codes</a></p>
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## 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)**.

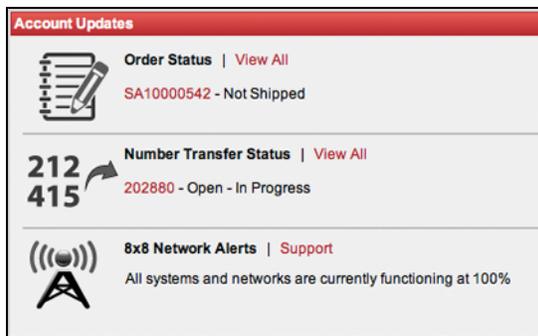
While ordering additional features, you may pause at any point during the order process. After pausing, just click **Continue Setup** to continue the order process from the point you last saved.



### 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](#).

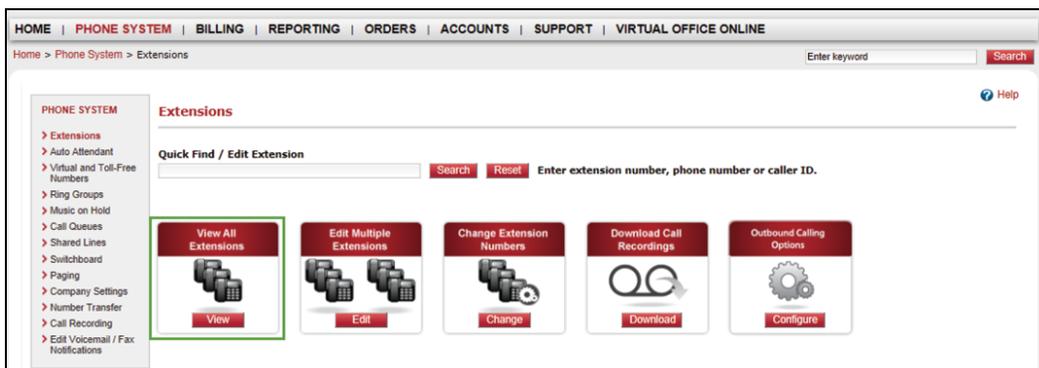
Use the Manage Extensions page to:

- [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.

- Find a user profile from the list and click **Select**.

The user profile is assigned to the extension.

**Extension Information**

User Profile: Supervisor Smith Create New User Profile | Clear User Profile | Reset Extension

**External Caller ID:**

- Phone Number: (408) 596-7728 (x1001) ?
- First Name: Supervisor ?
- Last Name: Smith ?
- Calling Name Display: SupervisorSmit ?

Caller ID Option Locked to User?  ?

Enable Virtual Office  ?

Enable Virtual Office Mobile  ?

Phone Number: (408) 596-7728

Extension: 1001

Plan: Unlimited Extension

Equipment: Polycom VVX 400

Group Paging: [Configure](#)

Line Keys: [Configure](#)

- 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.

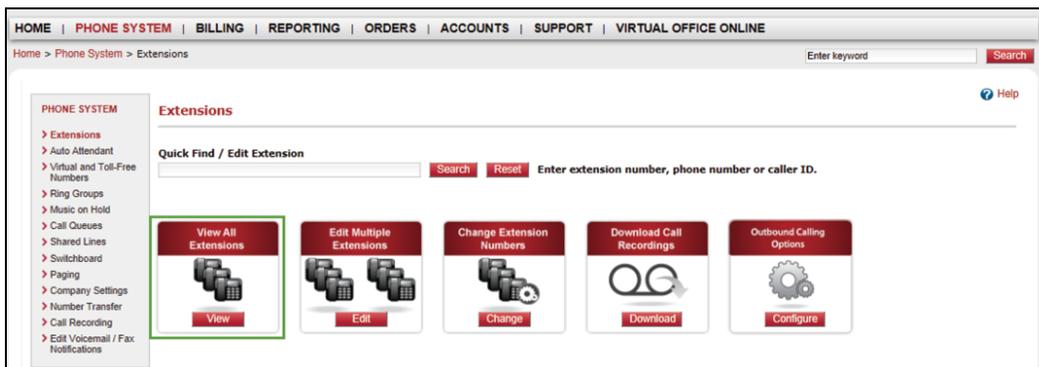


**Note:** Phone numbers appear in the E.164 numbering format.

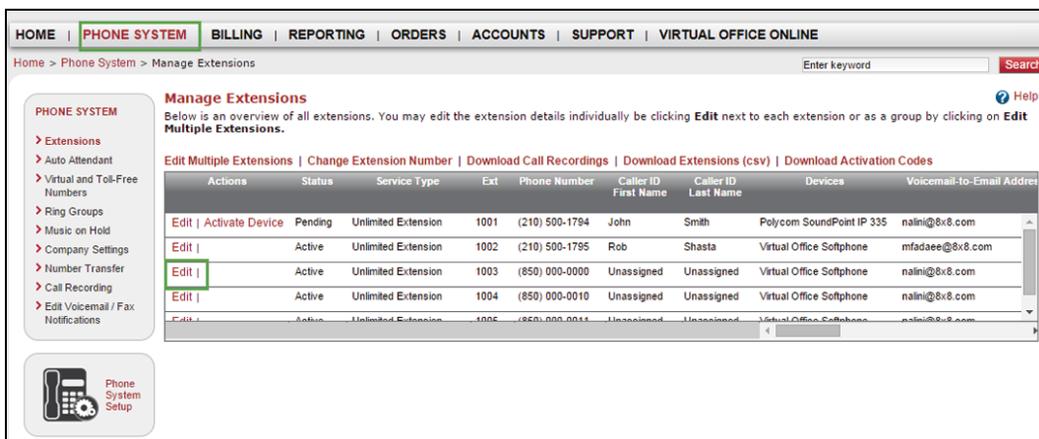
- Time zone, preferred Codec, emergency service address, calling options, Music on Hold selection, view billing statements, etc.
- Voicemail password, and email notification options.
- Call recording, fax notification, and Internet fax numbers.
- Call forwarding types and destinations.
- Membership information.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

### To access an Individual Extension:

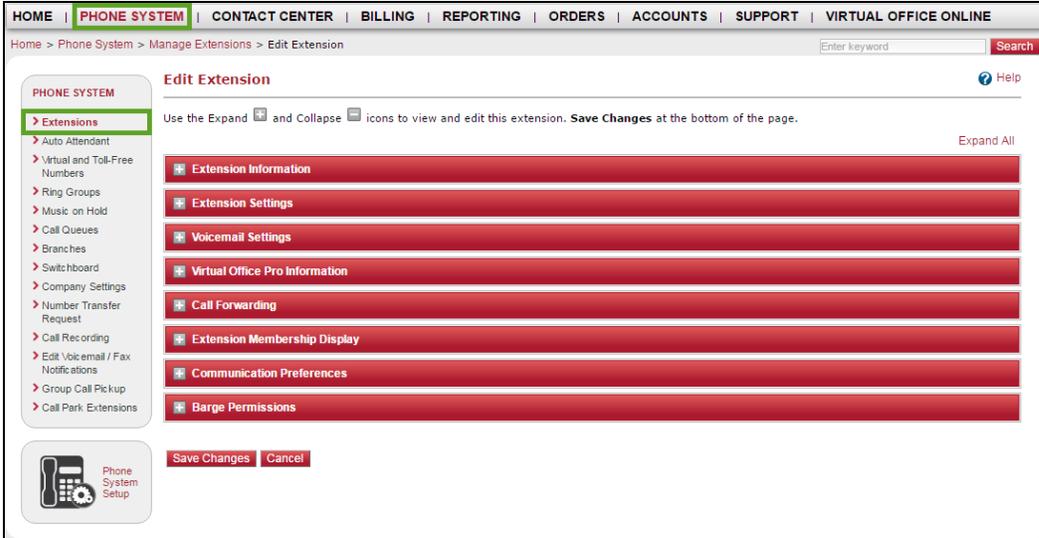
1. Go to **Phone System** in the top navigation bar.
2. Click **View All Extensions**.



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



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



The screenshot shows the 'Edit Extension' page in the 8x8 web interface. The navigation bar includes 'HOME', 'PHONE SYSTEM', 'CONTACT CENTER', 'BILLING', 'REPORTING', 'ORDERS', 'ACCOUNTS', 'SUPPORT', and 'VIRTUAL OFFICE ONLINE'. The 'PHONE SYSTEM' section is expanded, showing a list of settings including 'Extensions', 'Auto Attendant', 'Virtual and Toll-Free Numbers', 'Ring Groups', 'Music on Hold', 'Call Queues', 'Branches', 'Switchboard', 'Company Settings', 'Number Transfer Request', 'Call Recording', 'Edit Voicemail / Fax Notifications', 'Group Call Pickup', and 'Call Park Extensions'. The 'Extensions' setting is selected, leading to the 'Edit Extension' page. This page features a search bar, a 'Help' link, and an 'Expand All' button. Below the title, there is a note: 'Use the Expand  and Collapse  icons to view and edit this extension. Save Changes at the bottom of the page.' The main content area contains eight expandable panes: 'Extension Information', 'Extension Settings', 'Voicemail Settings', 'Virtual Office Pro Information', 'Call Forwarding', 'Extension Membership Display', 'Communication Preferences', and 'Barge Permissions'. At the bottom, there are 'Save Changes' and 'Cancel' buttons.



**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.

The screenshot shows the 'Extension Information' configuration page for user 'John Smith'. The 'Internal Caller ID' section is highlighted with a green box. It contains the following fields:

- External Caller ID:**
  - Phone Number: (210) 550-3922 (x1271046)
  - Caller ID Full Name: Acme Jets Inc
- Internal Caller ID:**
  - First Name: John
  - Last Name: Smith
  - Caller ID Full Name: JohnSmith
- Caller ID Option Locked to User?**

Other visible settings include:

- Phone Number: (650) 646-2992
- Extension: 1003
- Plan: Unlimited Extension
- Equipment: Polycom SoundPoint IP 550
- Group Paging: Configure
- Enable Virtual Office:
- Enable Virtual Office Mobile:

At the bottom, there are 'Save Changes' and 'Cancel' buttons.

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.

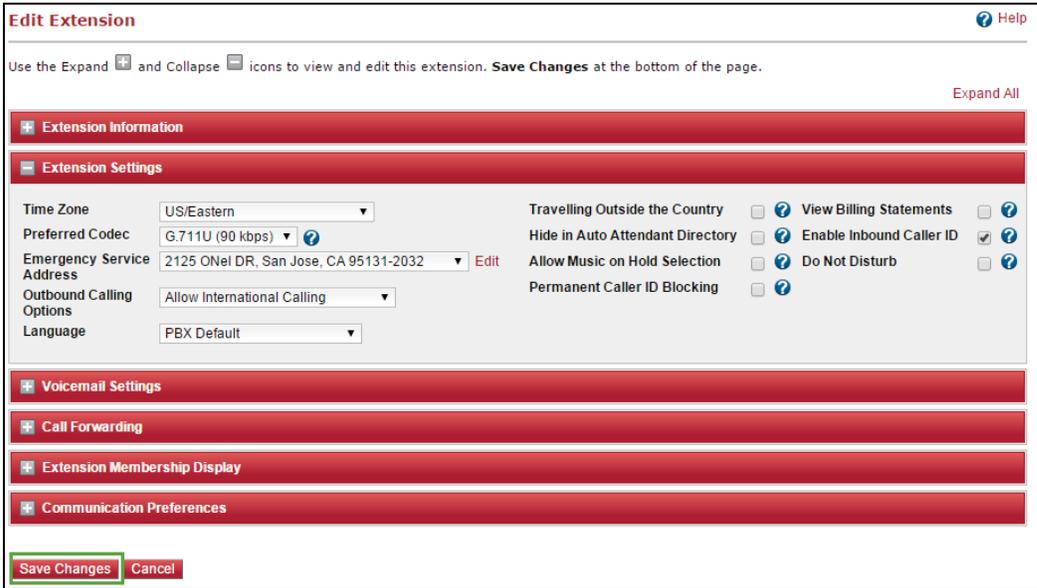
### Configure Extension Settings

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.



**Edit Extension** Help

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

**Extension Information**

**Extension Settings**

Time Zone: US/Eastern

Preferred Codec: G.711U (90 kbps)

Emergency Service Address: 2125 ONel DR, San Jose, CA 95131-2032 Edit

Outbound Calling Options: Allow International Calling

Language: PBX Default

Travelling Outside the Country:  View Billing Statements

Hide in Auto Attendant Directory:  Enable Inbound Caller ID

Allow Music on Hold Selection:  Do Not Disturb

Permanent Caller ID Blocking:

**Voicemail Settings**

**Call Forwarding**

**Extension Membership Display**

**Communication Preferences**

Save Changes Cancel

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
<b>Edit My Profile</b>	The primary or secondary administrators who have access to Account Manager can configure the <b>Language</b> setting in <b>Edit My Profile</b> 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
<b>Account &gt; User Profiles</b>	Configure the <b>Language</b> 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.	
<b>Phone System &gt; Company Settings</b>	<p>Configure the <b>Language</b> 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.</p> <p>In the absence of the individual extension user's language of choice, the language setting of branch overrides the PBX language setting.</p>	PBX level
<b>Phone System &gt; Branches</b> (Add-on subscription based)	<p>Configure the <b>Language</b> setting for users to receive Telephony IVR messages, such as voicemail greetings in the selected language.</p> <p>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.</p>	Branch level
<b>Phone System &gt; Edit Individual Extension</b>	<p>Configure the <b>Language</b> 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.</p> <p>This setting overrides the PBX and branch language setting.</p> <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;">  <p><b>Note:</b> If you need help with setting the user language in bulk, contact 8x8 Support for help.</p> </div> <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;">  <p><b>Note:</b> 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.</p> </div>	Extension level

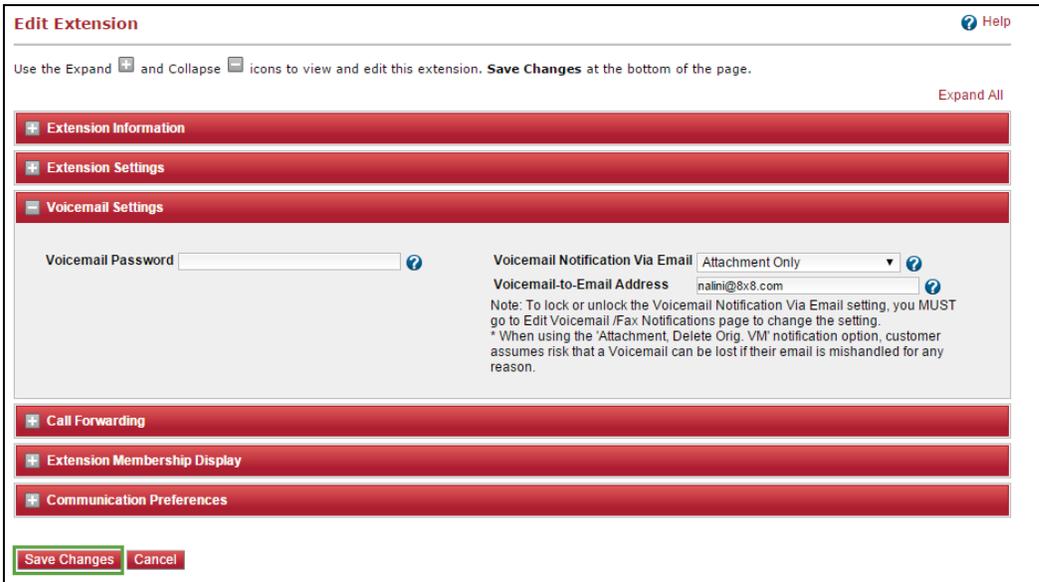
- Click **Save Changes** at the bottom of the screen.

### 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:



**Edit Extension** Help

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

**Extension Information**

**Extension Settings**

**Voicemail Settings**

Voicemail Password  ?

Voicemail Notification Via Email Attachment Only ?

Voicemail-to-Email Address natini@8x8.com ?

Note: To lock or unlock the Voicemail Notification Via Email setting, you MUST go to Edit Voicemail /Fax Notifications page to change the setting.  
\* When using the 'Attachment, Delete Orig. VM' notification option, customer assumes risk that a Voicemail can be lost if their email is mishandled for any reason.

**Call Forwarding**

**Extension Membership Display**

**Communication Preferences**

Save Changes Cancel

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.

**Edit Extension** Help

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

**Extension Information**

**Extension Settings**

**Voicemail Settings**

**Virtual Office Pro Information**

<p><b>Call Recording</b></p> <p>Call Recording Mode <span style="float: right;">On <input type="checkbox"/></span></p> <p>Play announcement when calls are recorded <span style="float: right;">Record On-Demand <input type="checkbox"/></span></p> <p>Allow user to purchase additional dial-in numbers for Virtual Meeting <span style="float: right;"><input type="checkbox"/> To Me <input type="checkbox"/> To Other Party</span></p> <p>Fax Notification Via Email <span style="float: right;"><input checked="" type="radio"/> Yes <input type="radio"/> No <span style="font-size: small;">?</span></span></p> <p>Fax-to-Email Address <span style="float: right;">Link &amp; Attachment <input type="checkbox"/> <span style="font-size: small;">?</span></span></p> <p style="font-size: small;">(add up to 5 email addresses)</p>	<p><b>Internet Fax Numbers</b></p> <p>Select Fax Number</p>	
---	---	--

Note: To lock or unlock the Fax-to-Email Address setting, you MUST go to EditVoicemail /Fax Notifications page to change the setting.

**Call Forwarding**

**Extension Membership Display**

**Communication Preferences**

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.

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

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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
2	Busy Forward	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

**To Manage Call Forwarding:**

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

Forward Type	Note
Always Forward	If you select the <b>Always Forward</b> check box, all other forwarding options will be disabled. To re-enable them, clear the <b>Always Forward</b> 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	

- If you select **Forward to One Number Access:**

Call Forwarding

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

**Ring Distribution**  Sequential  Simultaneous 

**Call Screening**  Disabled  Enabled 

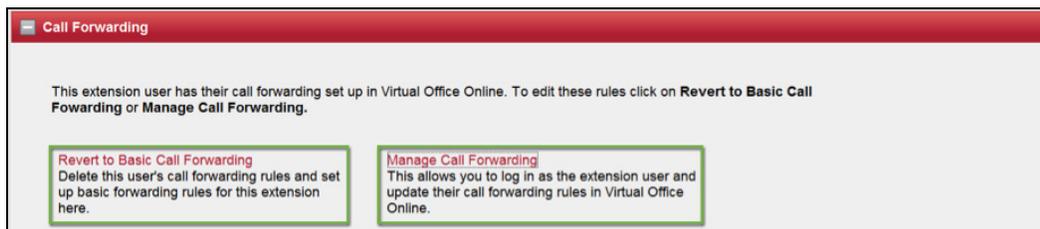
Order Index	Destination Number	Voice Mail Password Required	Ring for X Number of Seconds	
1	<input type="text"/>	<input type="checkbox"/>	20 <input type="text"/>	 

Option	Note
Select whether ring distribution is <b>Sequential</b> or <b>Simultaneous</b> .	
Select whether call screening is <b>Disabled</b> or <b>Enabled</b> .	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 <b>Voicemail Password Required</b> 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.

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

### Manage Call Forwarding: User Setup

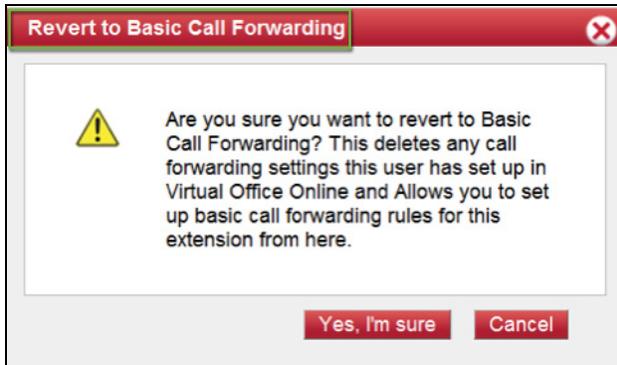
Users can set up their own call forwarding rules by logging in to the Virtual Office desktop app. When you edit an extension that already has call forwarding rules, you have the option to click **Revert to Basic Call Forwarding** or **Manage Call Forwarding**.



#### ■ 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.

**Edit Extension** Help

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

+ Extension Information

+ Voicemail Settings

+ Virtual Office Online User Profile

+ Call Forwarding

- Extension Membership Display

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

+ Communication Preferences

Save Changes
Cancel

### 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.

- Communication Preferences

Check to opt in to the following communications:

<input checked="" type="checkbox"/> <b>8x8 e-newsletters</b> Helpful tips with information on the latest news and features.	<input checked="" type="checkbox"/> <b>8x8 satisfaction surveys and product trials</b> Invite me to give feedback and try new products.
<input checked="" type="checkbox"/> <b>Product and promotion emails</b> Emails about new products, special discounts and offers.	<input type="checkbox"/> <b>Monthly bill notification (Admins only)</b> Email me when my monthly bill is available for viewing.

Users can update their communication preferences in their Virtual Office Online Accounts.

**Note:** 8x8 reserves the right to contact you regarding service, feature or policy announcements and information about your account.

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.

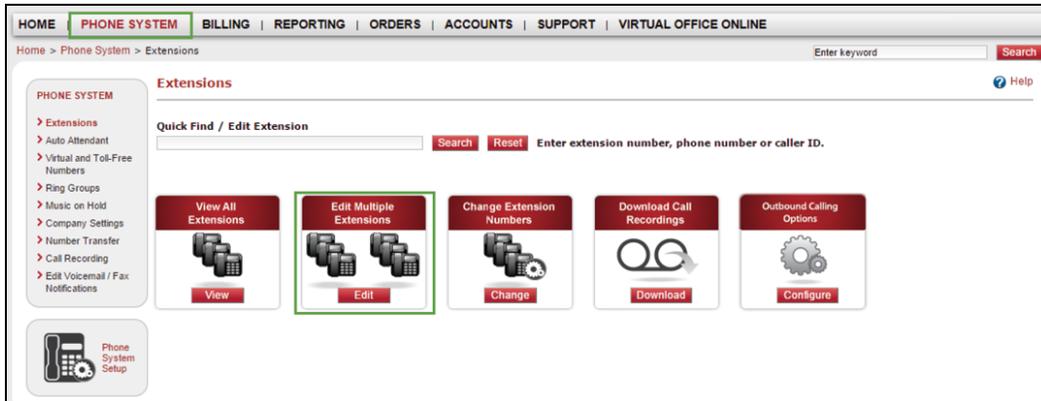


**Note:** Phone numbers appear in the E. 164 numbering format.

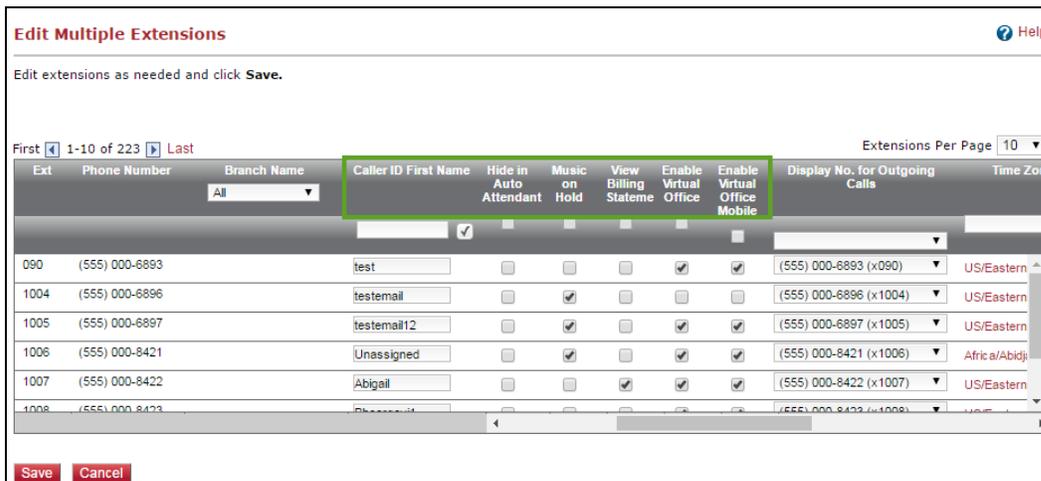
- Select time zones for phone display and voicemail time stamp.
- Enter an emergency service address for emergency services. The address for each user must be accurate and verified. This is needed whenever someone makes an emergency call from that extension.
- Select a preferred Codec for upload and 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.

- 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

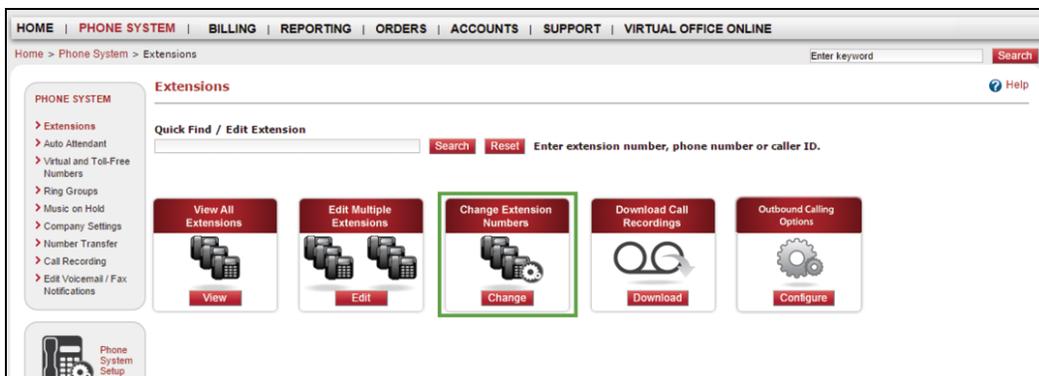
The default extensions in 8x8 Virtual Office start at 1001. The Change Extension Numbers feature allows you to change a selected individual extension number, or customize multiple extensions at once. You can change the extensions to eight-digit numbers, for example, or start at 2001. You can enter a 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:

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



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

**Change Extensions** ? Help

Use the extension map to the right to select a new extension or range of extensions. Check the extensions you would like to update. If you would like all extensions to be updated, make sure they are all checked. Enter a preferred extension range and click Go. The system will suggest a range of extension numbers available.

Suggest extensions for all regular voice lines to start at  **Go**

Select All | Deselect All

Update	Extension Type	Extension	New Extension	Suggest
<input checked="" type="checkbox"/>	Unlimited Extension	1001	<input type="text"/>	
<input checked="" type="checkbox"/>	Metered Extension	1002	<input type="text"/>	
<input checked="" type="checkbox"/>	Unlimited Extension	1003	<input type="text"/>	
<input checked="" type="checkbox"/>	Global Extension	1004	<input type="text"/>	
<input checked="" type="checkbox"/>	Shared Extension	1005	<input type="text"/>	
<input checked="" type="checkbox"/>	Basic Extension	1006	<input type="text"/>	
<input checked="" type="checkbox"/>	Unlimited Extension	1007	<input type="text"/>	
<input checked="" type="checkbox"/>	Overhead Paging	1008	<input type="text"/>	
<input checked="" type="checkbox"/>	Unlimited Extension	1009	<input type="text"/>	
<input checked="" type="checkbox"/>	Shared Extension	1010	<input type="text"/>	
<input checked="" type="checkbox"/>	Ring Group Extn	2002	<input type="text"/>	
<input checked="" type="checkbox"/>	Ring Group Extn	2003	<input type="text"/>	
<input checked="" type="checkbox"/>	Virtual Extension	3001	<input type="text"/>	

**Extension Usage Map**

- 1 - 8: Available
- 9 - 9: Reserved
- 10 - 89: Available
- 90 - 99: Reserved
- 100 - 199: Available
- 200 - 200: Reserved
- 201 - 399: Available
- 400 - 443: Reserved
- 444 - 444: Reserved for Auto Attendant
- 445 - 499: Reserved
- 500 - 500: Reserved for Voice Mail
- 501 - 555: Reserved
- 556 - 556: Reserved for Conference Bridge
- 557 - 699: Reserved
- 700 - 710: Available
- 711 - 711: Reserved
- 712 - 899: Available
- 900 - 999: Reserved
- 1000 - 1999: Available
- 2000 - 2000: Reserved for Ring Group
- 2001 - 4439: Available
- 4440 - 4499: Reserved for Additional Auto Attendant
- 4500 - 7999: Available
- 8000 - 9999: Reserved

**Save Changes** **Cancel**

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.

**Change Extensions**

Use the extension map to the right to select a new extension or range of extensions. Check the extensions you would like to update. If you would like all extensions to be updated, make sure they are all checked. Enter a preferred extension range and click Go. The system will suggest a range of extension numbers available.

Suggest extensions for all regular voice lines to start at  **Go**

Update	Extension Type	Extension	New Extension	Suggest
<input checked="" type="checkbox"/>	Unlimited Extension	1001	<input type="text" value="5001"/>	
<input checked="" type="checkbox"/>	Unlimited Extension	1002	<input type="text" value="5002"/>	
<input checked="" type="checkbox"/>	Unlimited Extension	1003	<input type="text" value="5003"/>	
<input checked="" type="checkbox"/>	Unlimited Extension	1004	<input type="text" value="5004"/>	
<input checked="" type="checkbox"/>	Unlimited Extension	1005	<input type="text" value="5005"/>	

**Save Changes** **Cancel**



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

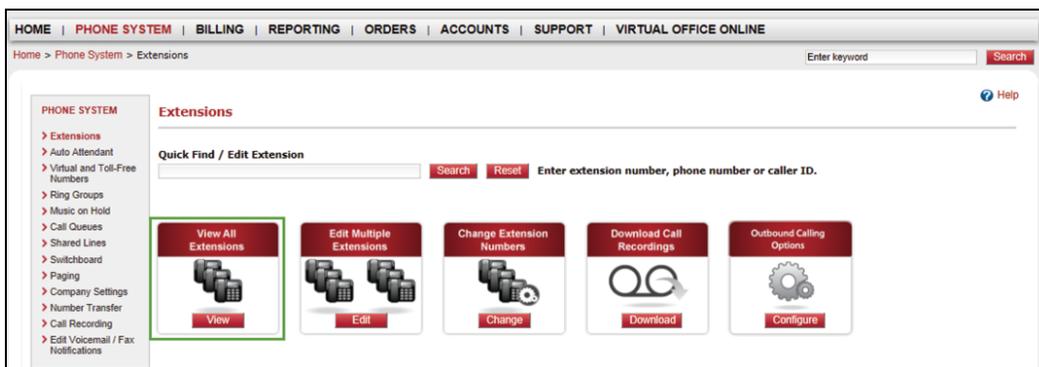
5. To change individual extensions:
  - Select the check box next to the extension(s) you want to change.
  - Enter an available number in the **New Extension** column, or click the **Suggest** icon to see the next available extension number in the same range.
6. Click **Save Changes** at the bottom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



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

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

Home > Phone System > Manage Extensions Enter keyword

**PHONE SYSTEM**

- Extensions
- Auto Attendant
- Virtual and Toll-Free Numbers
- Ring Groups
- Music on Hold
- Company Settings
- Number Transfer
- Call Recording
- Edit Voicemail / Fax Notifications

**Manage Extensions** Help

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 Extensions**.

[Edit Multiple Extensions](#) | [Change Extension Number](#) | [Download Call Recordings](#) | [Download Extensions \(csv\)](#) | [Download Activation Codes](#)

Actions	Status	Service Type	Ext	Phone Number	Caller ID First Name	Caller ID Last Name	Devices	Voicemail-to-Email Address
<a href="#">Edit</a>   <a href="#">Activate Device</a>	Pending	Unlimited Extension	1001	(210) 500-1794	John	Smith	Polycom SoundPoint IP 335	nalini@8x8.com
<a href="#">Edit</a>	Active	Unlimited Extension	1002	(210) 500-1795	Rob	Shasta	Virtual Office Softphone	mfadaee@8x8.com
<a href="#">Edit</a>	Active	Unlimited Extension	1003	(850) 000-0000	Unassigned	Unassigned	Virtual Office Softphone	nalini@8x8.com
<a href="#">Edit</a>	Active	Unlimited Extension	1004	(850) 000-0010	Unassigned	Unassigned	Virtual Office Softphone	nalini@8x8.com

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

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

Home > Phone System > Manage Extensions > Edit Extension Enter keyword

**PHONE SYSTEM**

- Extensions
- Auto Attendant
- Virtual and Toll-Free Numbers
- Ring Groups
- Music on Hold
- Call Queues
- Branches
- Switchboard
- Company Settings
- Number Transfer Request
- Call Recording
- Edit Voicemail / Fax Notifications
- Group Call Pickup
- Call Park Extensions

**Edit Extension** Help

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

- [Extension Information](#)
- [Extension Settings](#)
- [Voicemail Settings](#)
- [Virtual Office Pro Information](#)
- [Call Forwarding](#)
- [Extension Membership Display](#)
- [Communication Preferences](#)
- [Barge Permissions](#)

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

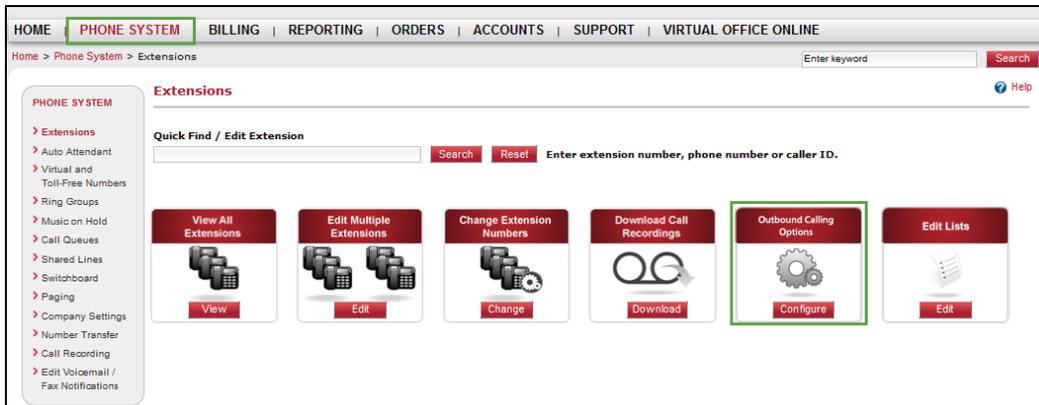
## Define Outbound Calling Options

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.

**Outbound Calling Options** Help

**PBX Defaults**

Outbound Calling Options: Domestic (in country) Calling  
 Service Country: United States

**Extension Outbound Calling Options**

**Edit Outbound Calling Options**

Select the Outbound Calling Options for this extension.

- Domestic (in country) Calling
- PBX Default
- Domestic (in country) Calling
- Allow International Calling
- Only Emergency Calling
- INTERNATIONAL\_USO

OK Cancel

Ext	Phone Number	City Code	Calling Options
1001	(650) 646-3018	1650	Domestic (in country) Calling
1002	(650) 646-2988	1650	Domestic (in country) Calling
1003	(650) 646-2992	1650	Domestic (in country) Calling
1004	(650) 646-3006 Sarah Thor	SUNNYVALE 1650	Domestic (in country) Calling
1005	(650) 646-3020 Suzy White	United States SUNNYVALE 1650	Domestic (in country) Calling
1006	(555) 648-0703 Specialty Cookies	United States SUNNYVALE 1555	Domestic (in country) Calling
1007	(408) 627-8740 Jean Andje	United States SUNNYVALE 1408	Domestic (in country) Calling
1009	(408) 329-7176 Ramana Gottipati	United States SUNNYVALE 1408	Allow International Calling
1010	(555) 798-3628 Sharing FromAccounting	United States SUNNYVALE 1555	Domestic (in country) Calling
1011	(408) 329-7136 Beth Carney	United States SUNNYVALE 1408	Allow International Calling

Save Cancel

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**.

**Virtual Office Call Recording Settings**

Set the call recording settings for individual or all extensions and click **Save**. [Download Call Recordings](#)

Ext	Phone Number	Caller ID First Name	Caller ID Last Name	Recording Mode	Play Announcement When Calls Are Recorded		Restrict Extension User Access To			
					To Other Party	To Extension User	Enable/Disable Recording	Change Announcement Settings	Delete Recordings	Listen To Recordings
1001	(850) 648-3018	Phillip	Liu	Off	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1003	(850) 648-2992	Sarah	Thomas	Record On-Demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1004	(850) 648-3006	Phillip	Liu	Record On-Demand	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



**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.



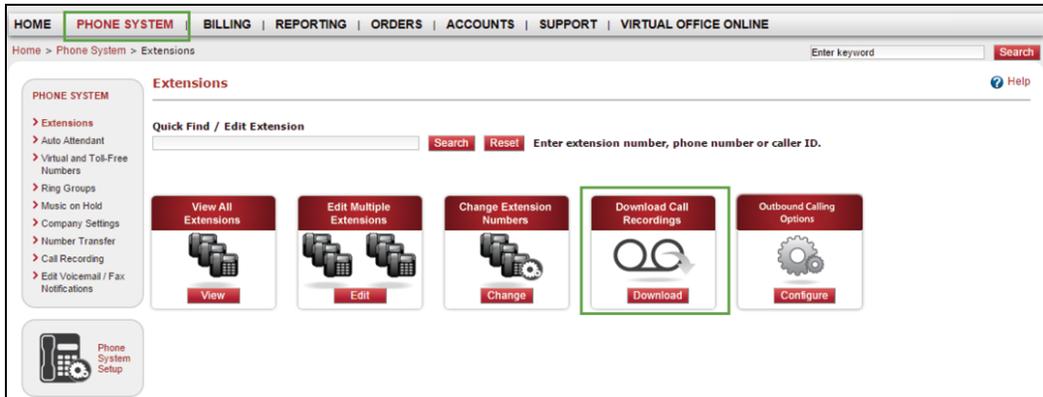
**Note:** Select a check box in the header row to select and apply a change to all extensions.

## Download Call Recording

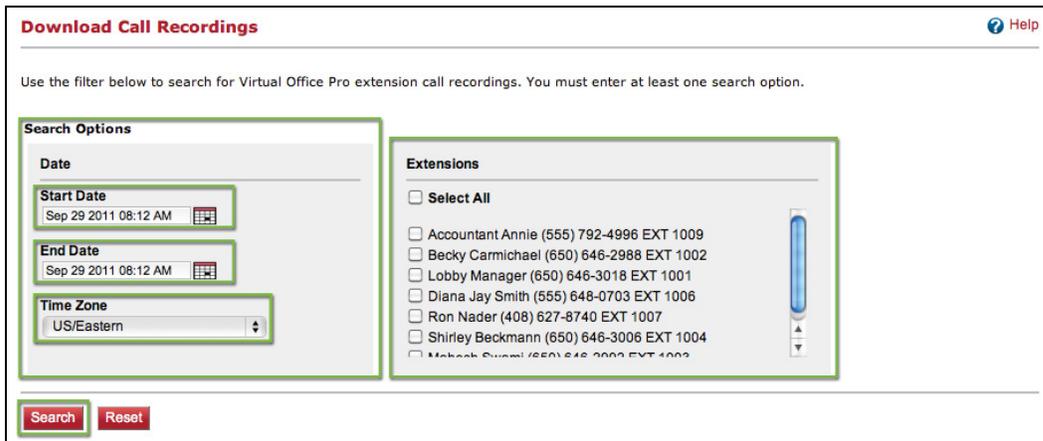
If your 8x8 corporate account includes Virtual Office Pro, users can record calls from their extensions. Users and their branch administrators can access and download call recordings. Extensions users can access their call recordings via Virtual Office desktop app, while administrators can access recordings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



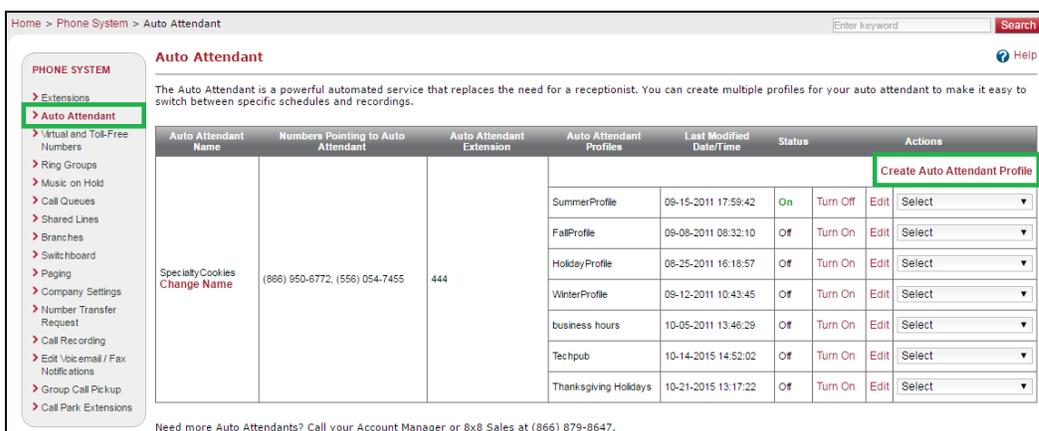
From	To	Call Recording Date and Time	Call Direction	Call Duration	Recording Size (MB)	
Rob Shasta	1020	01-27-2017 19:12:03	Outbound	00:03:38	1.6624	Play / Download
Sarah Thomas	1023	01-27-2017 19:07:29	Outbound	00:04:01	1.8417	Play / Download
Lisa Black	1029	01-27-2017 19:05:32	Outbound	00:01:21	0.6177	Play / Download

## 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**.



Home > Phone System > Auto Attendant

Auto Attendant

The Auto Attendant is a powerful automated service that replaces the need for a receptionist. You can create multiple profiles for your auto attendant to make it easy to switch between specific schedules and recordings.

Auto Attendant Name	Numbers Pointing to Auto Attendant	Auto Attendant Extension	Auto Attendant Profiles	Last Modified Date/Time	Status	Actions
SpecialtyCookies Change Name	(866) 950-6772, (556) 054-7455	444	SummerProfile	09-15-2011 17:59:42	On	Turn Off Edit Select
			FallProfile	09-08-2011 08:32:10	Off	Turn On Edit Select
			HolidayProfile	08-25-2011 16:18:57	Off	Turn On Edit Select
			WinterProfile	09-12-2011 10:43:45	Off	Turn On Edit Select
			business hours	10-05-2011 13:46:29	Off	Turn On Edit Select
			Techpub	10-14-2015 14:52:02	Off	Turn On Edit Select
			Thanksgiving Holidays	10-21-2015 13:17:22	Off	Turn On Edit Select

Need more Auto Attendants? Call your Account Manager or 8x8 Sales at (866) 879-8647.

- 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.

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

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

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

**Auto Attendant Name** SpecialtyCookies  
**Auto Attendant Extension** 444  
**Profile Name** Summer Profile  
**Branch Office** All Extensions  
**Time Zone \*** US/Pacific

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.

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

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



### Define Your Business Hours of Operation

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

**Business Hours**

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

**24/7 Business Hours**  
 Define Business Hours

**Holiday Hours (Optional)**

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

Date	Description
<input type="text"/> 	<input type="text"/> <span style="color: red;">-</span> <span style="color: green;">+</span>

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.

**Create Auto Attendant Profile** Help

**STEPS:** Profile Information » Hours of Operation » **Business Hours** » After Hours » Lunch Hours » Holiday Hours » Recordings

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

 **Define Your Business Hours of Operation**

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

**Business Hours**

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

24/7 Business Hours  
 Define Business Hours

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

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

**Lunch Hour (Optional)**

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

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

**Business Hour Exceptions (Optional)**

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

Date	Start Time	End Time

**Holiday Hours (Optional)**

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

Date	Description

[< Back](#)

[Next >](#) [Cancel](#)



**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.

The screenshot shows a configuration interface with three main sections: 'Press', 'Description', and 'Call Routing'. Under 'Press', there is a dropdown menu currently set to 'Key 9'. Under 'Description', there is a text input field containing 'Dial by Extension'. Under 'Call Routing', there is a dropdown menu also set to 'Dial By Extension'. To the right of these fields are two circular icons: a red one with a white minus sign and a green one with a white plus sign, used for adding or deleting settings.

- 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](#).

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

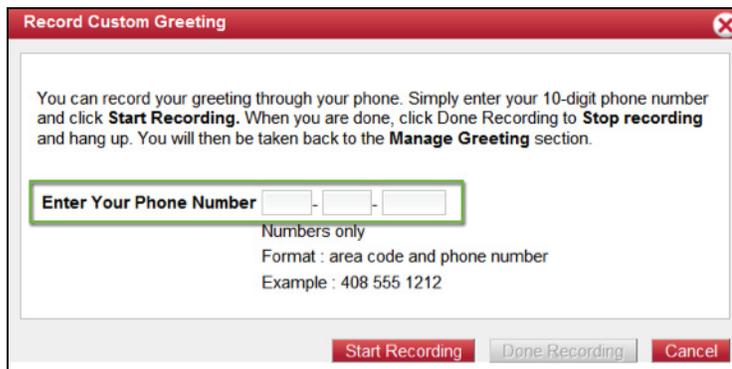
- Click **Upload** under the appropriate menu.
- Click the **Add** button.
- Select the audio file you want to upload.
- Click **Upload**.

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

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

### 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.

- 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:

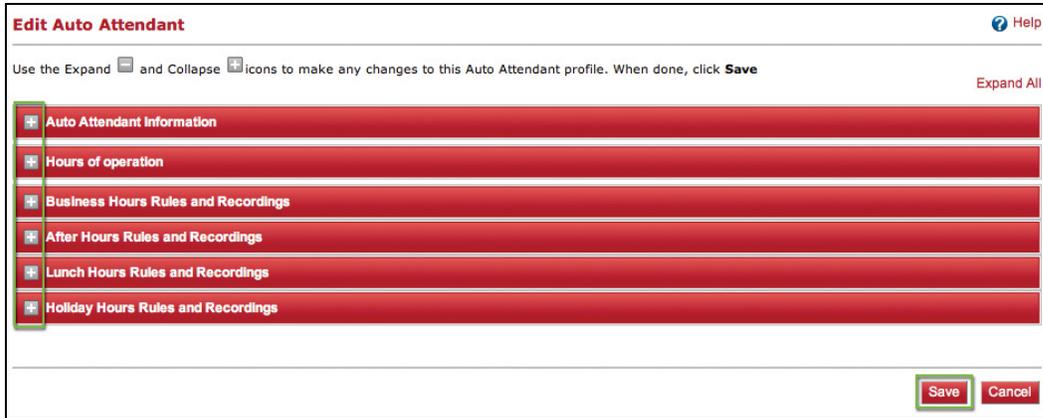
- Click **Phone System** in the top navigation bar.
- Under the **Phone System** menu, click **Auto Attendant**.
- Locate the profile you want to modify in the list, and click **Edit**.

Auto Attendant <span style="float: right;">? Help</span>						
The Auto Attendant is a powerful automated service that replaces the need for a receptionist. You can create multiple profiles for your auto attendant to make it easy to switch between specific schedules and greetings.						
Auto Attendant Name	Numbers Pointing to Auto Attendant	Auto Attendant Extension	Auto Attendant Profiles	Last Modified Date/Time	Status	Actions
						<b>Create Auto Attendant Profile</b>
			SummerProfile	09-15-2011	On	Turn Off Edit Select
			FallProfile	09-08-2011	Off	Turn On Edit Select



**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.

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

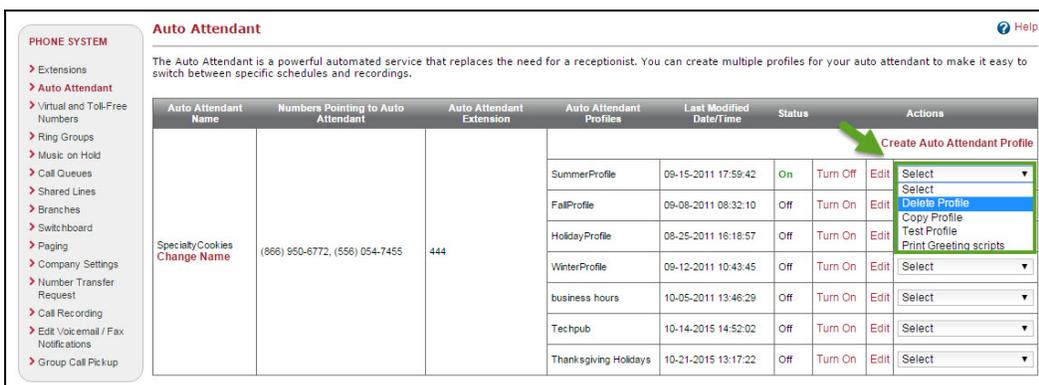



**Note:** If you selected **24/7 Business Hours** when configuring Auto Attendant, you cannot edit or configure rules for **After Hours**, **Lunch Hour**, or **Holiday Hours**. 24/7 applies to all hours, every day.

- 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.



Auto Attendant Name	Numbers Pointing to Auto Attendant	Auto Attendant Extension	Auto Attendant Profiles	Last Modified Date/Time	Status	Actions
SpecialtyCookies Change Name	(866) 950-6772, (556) 054-7455	444				<a href="#">Create Auto Attendant Profile</a> Edit <span>▼</span> Select Select Delete Profile Copy Profile Test Profile Print Greeting scripts
SummerProfile				09-15-2011 17:59:42	On	Turn Off Edit
FallProfile				09-08-2011 08:32:10	Off	Turn On Edit
HolidayProfile				08-25-2011 16:18:57	Off	Turn On Edit
WinterProfile				09-12-2011 10:43:45	Off	Turn On Edit
business hours				10-05-2011 13:46:29	Off	Turn On Edit
Techpub				10-14-2015 14:52:02	Off	Turn On Edit
Thanksgiving Holidays				10-21-2015 13:17:22	Off	Turn On Edit

## 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**.

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

Search

Home > Phone System > Company Settings
Enter keyword Search

**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > Call Queues
- > Branches
- > Switchboard
- > **Company Settings**
- > Number Transfer Request
- > Call Recording
- > Edit Voicemail / Fax Notifications
- > Group Call Pickup
- > Call Park Extensions



Phone System Setup

### Edit Company Settings ? Help

**Phone System Name**

Current Phone System Name AcmeJets

New Phone System Name  ?

**Language**

Language English (U.S.) ?

**Caller ID**

Company Name AcmeJets, Inc. ?

Main Number  ?

**Messaging**

Enable IM <input checked="" type="checkbox"/> <span style="float: right; font-size: x-small;">?</span>	Allow Saving Message History <input checked="" type="checkbox"/> <span style="float: right; font-size: x-small;">?</span>
Enable SMS <input checked="" type="checkbox"/> <span style="float: right; font-size: x-small;">?</span>	Allow Deletion of Message History <input checked="" type="checkbox"/> <span style="float: right; font-size: x-small;">?</span>

**Time Zone**

Selecting Time Zone controls the PBX default time zone. PBX default time zone affects the Virtual Office Analytics reports below. By changing the time zone here, time zone on the reports changes.

\* Company summary

\* Extensions summary

\* DID Calls

All other Analytics reports have time zone selection from the report's user interface.

US/Eastern ?

**Extension Dial Plan Settings**

Extension Length  ?

Phone System Access Code  ?

Setting for Branch Code is under Branches Go to Branches ?

**Voicemail Password Length Setting**

Minimum voicemail password length 4 ?

**Communication Preferences**

**Corporate Directory**

**System Call Recording**

**Voicemail Display in Virtual Office Online**

Note: 8x8 reserves the right to contact you regarding service, feature or policy announcements and information about your account.

Save
Cancel

- 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.
- 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.

- 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.

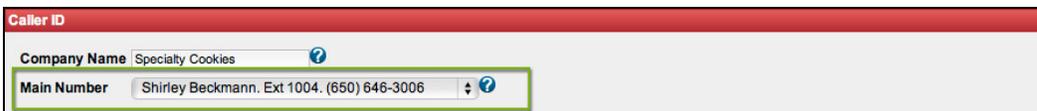
### Summary of Localization Settings

The following table summarizes the localization settings in Account Manager:

Setting	Description	Configured At
<b>Edit My Profile</b>	The primary or secondary administrators who have access to Account Manager can configure the <b>Language</b> setting in <b>Edit My Profile</b> 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
<b>Account &gt; User Profiles</b>	Configure the <b>Language</b> 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
<b>Phone System &gt; Company</b>	Configure the <b>Language</b> 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
<b>Settings</b>	<p>extension level.</p> <p>In the absence of the individual extension user's language of choice, the language setting of branch overrides the PBX language setting.</p>	
<b>Phone System &gt; Branches</b> (Add-on subscription-based)	<p>Configure the <b>Language</b> setting for users to receive Telephony IVR messages, such as voicemail greetings in the selected language.</p> <p>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.</p>	Branch level
<b>Phone System &gt; Edit Individual Extension</b>	<p>Configure the <b>Language</b> 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.</p> <p>This setting overrides the PBX and branch language setting.</p> <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;">  <p><b>Note:</b> If you need help with setting the user language in bulk, contact 8x8 Support for help.</p> </div> <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;">  <p><b>Note:</b> 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.</p> </div>	Extension level

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



- 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.

### Extension Dial Plan Settings

Extension Length	<input type="text" value="7"/>	<a href="#">?</a>
Phone System Access Code	<input type="text" value="17"/>	<a href="#">?</a>
Setting for Branch Code is under Branches	<a href="#">Go to Branches</a>	<a href="#">?</a>

### Voicemail Password Length Setting

Minimum voicemail password length  [?](#)

- [Communication Preferences](#)
- [Corporate Directory](#)
- [System Call Recording](#)
- [Voicemail Display in Virtual Office Online](#)

Note: 8x8 reserves the right to contact you regarding service, feature or policy announcements and information about your account.

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



**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.

**Account Manager** Company Name: Specialty Cookies | Main Number: (510) 962-5321

Welcome, Phillip Liu | Sign Out  
Email: pliu@8x8.com  
Edit My Profile

Account: Business

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

Home > Accounts > Communication Preferences

**Communication Preferences**

The company preferences below will override the selected individual extension user's settings. Extension users can update their communication preferences in their Virtual Office Online Account.

Ext	Phone Number	Caller ID First Name	Caller ID Last Name	Username	Newsletters	Product and Promo Emails	Surveys and Product Trials
1001	(650) 646-3018	Phillip	Liu	Not Assigned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1002	(650) 646-2988	Sukhanya	Rajan	Not Assigned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1003	(650) 646-2992	Neena	Thomas	SPECIALTYCOOKIES.I	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1004	(650) 646-3006	phillip	Liu	Not Assigned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1006	(555) 648-0703	Specialty	Cookies	Not Assigned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1007	(408) 627-8740	Jean	Andje	JEAN.ANDJE@8X8.CC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1009	(408) 329-7176	Ramana	Gottipati	SPECIALTYCOOKIES.I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1011	(408) 329-7136	Beth	Camey	SPECIALTYCOOKIES.I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Note: 8x8 reserves the right to contact you regarding service, feature or policy announcements and information about your account.

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

## 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**.

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

Home > Phone System > Number Transfer Request

Number Transfer Request

**Incomplete Transfer Request(s)**

Date Started	Status	Action
09-12-2011 07:23 PM PDT	Pending	Cancel   Continue
10-12-2011 09:14 AM PDT	Pending	Cancel   Continue

**Number Transfer Status**

**NUMBER TRANSFER STATUS >**

Once you've begun the Number Transfer process, check here for progress reports or to update your transfer requests (Case 1Ds).

**Before you begin:**

- Gather Phone Bills.** Have copies of your current bill(s) handy (from within the last 35 days). If you are transferring toll-free numbers we will also ask you to fax or upload your bill during this process.
- Know Your Service Address.** It's important to know the exact Service Address for the numbers you want to transfer. For regular phone and fax numbers this is the actual service location of the numbers. For toll-free and mobile/cell numbers it's the same as your Billing Address on your current provider's bill. For international number LNP, click here for more information.
- Have a Plan.** Have a list of the numbers you want to transfer, and which 8x8 extensions or temporary numbers you want to transfer them to.
- Transferring mobile/cell numbers?** You will need either the last 4 digits of the Social Security Number associated with this account, OR the Account Number and PIN. Please do not cancel your current phone service until after we confirm your numbers have been transferred. Disconnected numbers cannot be transferred. In most cases, we can transfer your number within 10 business days. In some cases, number transfers can take up to 4 weeks depending on when your current provider releases your number(s).

**BEGIN NUMBER TRANSFER >**

**PRINT NUMBER TRANSFER CHECKLIST >**

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

**Check Number Transfer Status**

**Submitted case list**

Case Index	Case ID	Summary	Status	Detail	Service Provider	Submitted Date	View
1	202880	2143209494	Open - In Progress	Transfer Request Submitted to Former Provider	AT&T	09-03-2011 12:22 AM GMT	View

**< Back** **BEGIN NUMBER TRANSFER >**

## 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.

**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > Call Queues
- > Shared Lines
- > Branches
- > Switchboard
- > Paging
- > Company Settings
- > Number Transfer Request**
- > Call Recording
- > Edit Voicemail / Fax Notifications
- > Group Call Pickup
- > Call Park Extensions



Phone System Setup

### Number Transfer Request

---

**Incomplete Transfer Request(s)**

Date Started	Status	Action
09-12-2011 07:23 PM PDT	Pending	<a href="#">Cancel</a>   <a href="#">Continue</a>
10-12-2011 09:14 AM PDT	Pending	<a href="#">Cancel</a>   <a href="#">Continue</a>



**Before you begin:**

- 1 Gather Phone Bills.** Have copies of your current bill(s) handy (from within the last 35 days). If you are transferring toll-free numbers we will also ask you to fax or upload your bill during this process.
- 2 Know Your Service Address.** It's important to know the exact Service Address for the numbers you want to transfer. For regular phone and fax numbers this is the actual service location of the numbers. For toll-free and mobile/cell numbers it's the same as your Billing Address on your current provider's bill. For international number LNP, [click here](#) for more information.
- 3 Have a Plan.** Have a list of the numbers you want to transfer, and which 8x8 extensions or temporary numbers you want to transfer them to.
- 4 Transferring mobile/cell numbers?** You will need either the last 4 digits of the Social Security Number associated with this account, OR the Account Number and PIN.  
Please do not cancel your current phone service until after we confirm your numbers have been transferred. Disconnected numbers cannot be transferred. In most cases, we can transfer your number within 10 business days. In some cases, number transfers can take up to 4 weeks depending on when your current provider releases your number(s).



PRINT NUMBER TRANSFER CHECKLIST >

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.



**Begin Number Transfer** Need help? Click to chat with our Local Number Porting group  [Help](#)

Before you begin the number transfer process, please answer the following questions to determine whether your number(s) can be transferred to 8x8.

- Yes  No Are the phone numbers you are transferring currently active with your current provider? [More Info](#)
- Yes  No Are you transferring a number to the 8x8 Virtual Contact Center service? [More Info](#)
- Yes  No Are you porting a United States local or toll-free number? [More Info](#)
- Yes  No Do you currently have DSL service on any of the phone numbers you are transferring to 8x8? [More Info](#)
- Yes  No Do you have any of these features on the numbers you want to transfer: Centrex, Distinctive Ring, Ring Mate, Hunting, CustopAK or ISDN? [More Info](#)
- Yes  No Have you recently requested any new services or features with your current provider? [More Info](#)

[Cancel Request](#)

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

**Number Transfer** [Help](#)

Step 1: Service Locations & Numbers Step 2: Review Information Step 3: Authorize Transfer Step 4: Confirmation Need help? Click to chat with our Local Number Porting group  [?](#)

**Determine How Many Service Address Locations**

Service addresses are the actual location of physical phone lines or the billing address(es) for mobile/cell and toll-free accounts. You will have an opportunity to add or remove locations later.

Number of service address locations \*

[Next >](#) [Save for later](#) [Cancel Request](#)

[< Back](#)

9. Click **Next**.

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

Service Location: Enter Service Address and Service Provider Information

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

Location 1 of 1

\* Is this location a business or residence?  
 Business  Residential

\*How many providers are there for this location

---

\* Company Name

\* Authorized -First Name

\* Authorized -Last Name

\* Service Provider

\* Billing Telephone

---

\*Street Number

Location Type

\*City

Pre Directional

Unit Suit #

\*State

\*Street Name

\*Postal Code

Post Directional

Street Name Suffix

Next >
Save for later
Cancel Request

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.



AT&T: Number(s) to Transfer

Enter number(s) you wish to transfer for AT&T.

4084925678, 4084927432

**"AT&T" Numbers:**  
Type or Paste the numbers you wish to Transfer.  
Note: Numbers must be separated by 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.

**AT&T: Number(s) to Transfer**

Enter the number and type of number you want to transfer, then select the temporary number it will replace. Click the  or  to add/remove additional lines.

**Service Provider :** AT&T      **Billing Telephone Number :** (123) 456-7890

Type of Number to Transfer	Number(s) To Transfer	Temporary Number to Replace
Standard/Fax Number  	4084925678	(650) 646-3018 x1001 (Unlimited Extension) 
Standard/Fax Number  	4084927432	(555) 648-0703 x1006 (Basic Extension) 

15. Click **Next**.

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

**Review Information:**

Below is the list of all the numbers you wish to transfer and their service providers. Please review and make sure all the information is correct.

Location 1 of 1	Business A Plus Auto Repair Shirley Biederman	View Location
123 Sunnyside USA 94306		

**Service Provider Name: AT&T ||| Billing Phone Number: 1234567890**

Number(s) To Transfer	Temporary Number(s)	Number Type
4084925678	(650) 646-3018 x1001 (Unlimited Extension)	LI
4084927432	(555) 648-0703 x1006 (Basic Extension)	LI

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.

**Number Transfer**

**Number Transfer Request**

Date Started	Status	Action
09-12-2011 07:23 PM PDT	Pending	<span style="border: 1px solid green; padding: 2px;">Cancel   Continue</span>
10-12-2011 09:14 AM PDT	Pending	Cancel   Continue

## 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.

The screenshot shows the 8x8 Account Manager interface. The top navigation bar includes 'HOME', 'PHONE SYSTEM', 'BILLING', 'REPORTING', 'ORDERS', 'ACCOUNTS', 'SUPPORT', and 'VIRTUAL OFFICE ONLINE'. The 'PHONE SYSTEM' menu is expanded, and 'Virtual and Toll-Free Numbers' is selected. The page title is 'Virtual and Toll-Free Numbers'. Below the title, there is a table with columns: Action, Number Type, Phone Number, Destination, Service Address, Caller ID, and Ext. User Access. The table contains four rows of data. Below the table, there is a section titled 'Common Uses for Virtual and Toll-Free Numbers' with a list of bullet points.

Action	Number Type	Phone Number	Destination	Service Address	Caller ID	Ext. User Access
<a href="#">Edit</a>	Virtual Number	(510) 962-5321	Philip Liu, Ext 1001 - (650) 646-3018	810 W MAUDE AVE SUNNYVALE CA 94085 -2910		
<a href="#">Edit</a>	Toll Free 100 Minutes	(866) 950-6772	Ext 444 - Auto Attendant	810 W MAUDE AVE SUNNYVALE CA 94085 -2910		
<a href="#">Edit</a>	Virtual Number	(556) 054-7455	Ext 444 - Auto Attendant	220 primrose DR san jose CA 95123 -4447 US		
<a href="#">Edit</a>	Virtual Number	unassigned	unassigned	W MAUDE AVE SUNNYVALE CA 94085 -2910 USA		

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

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

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.

**Edit Toll-Free/Virtual Number**

Please select the destination for this number

Number Type: Virtual Number  
Phone: (510) 962-5321  
Parent Destination Type: Business  
Sub Parent Destination Type: Business  
Destination: Virtual Meeting  
Optional Caller ID Name: First [ ] Last [ ]  
Allow User Access to Optional Caller ID  ?

---

**Change Service Address**

Country\*: United States  
Street Number\*: 810  
Pre-Directional: W - West Street Name\*: MAUDE Street Name Suffix: Avenue Post-Directional: [ ]  
Secondary Location: [ ] Unit/Other: [ ]  
City\*: SUNNYVALE State\*: California Zip Code\*: 94085 Zip+4: 2910

Confirm Cancel

- From the **Sub Parent Destination Type** drop-down, select a service type (such as call queue or ring group) associated with this number.
- Select an **Optional Caller ID Name**.
- 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.
- Enter a new location, or **Change Service Address**.  
The service address describes a detailed location required by the emergency service providers.
- 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**.

Ring Groups	Group Extension	Incoming	Group Members	Action
<b>CUSTOMER SUPPORT</b> Ring Pattern: Cyclo No of Cycles: 3 Busy Forward: 555 Voicemail No Answer Forward: 555 Voicemail Always Forward: Internet Outage Forward:	2002		Phillip Liu 1004 Jean Andje 1007 Sukhanya Rajan 1002	Edit Delete
<b>Quality Control</b> Ring Pattern: Cyclo No of Cycles: 1 Busy Forward: 444 Auto Attendant No Answer Forward: 444 Auto Attendant Always Forward: Internet Outage Forward:	2003		Phillip Liu 1001 Specialty Cookies 1006	Edit Delete

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:

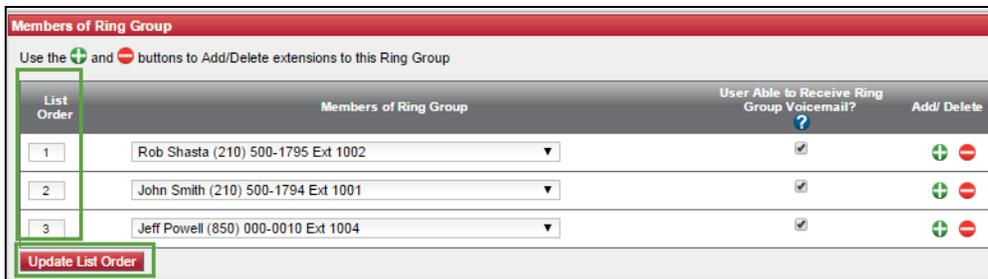
- Should be 4-15 digits long.
- Should not use same digits such as 1111, 2222.
- Should not use years from 1900 till present.
- Should not be of ABAB format such as 1010, 2121,3131.
- Should not use sequential numbers such as 1234, 4567.
- Should not use easy to key in numbers from the center of keypad. 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**.



List Order	Members of Ring Group	User Able to Receive Ring Group Voicemail?	Add/ Delete
1	Rob Shasta (210) 500-1795 Ext 1002	<input checked="" type="checkbox"/>	 
2	John Smith (210) 500-1794 Ext 1001	<input checked="" type="checkbox"/>	 
3	Jeff Powell (850) 000-0010 Ext 1004	<input checked="" type="checkbox"/>	 

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**.

Ring Groups						<a href="#">Help</a>
Ring Groups allow you to group a number of extensions together to share distribution of incoming calls						
				<a href="#">Create Ring Group</a>	<a href="#">Delete All Ring Groups</a>	
Ring Groups	Group Extension	Incoming	Group Members		<a href="#">Edit</a>	<a href="#">Delete</a>
<b>CUSTOMER SUPPORT</b> Ring Pattern: Cyclic No of Cycles: 3 Busy Forward: 555 Voicemail No Answer Forward: 555 Voicemail Always Forward: Internet Outage Forward:	2002		Phillip Liu 1004 Jean Andje 1007 Sukhanya Rajan 1002		<a href="#">Edit</a>	<a href="#">Delete</a>
<b>Quality Control</b> Ring Pattern: Cyclic No of Cycles: 1 Busy Forward: 444 Auto Attendant No Answer Forward: 444 Auto Attendant Always Forward: Internet Outage Forward:	2003		Phillip Liu 1001 Specialty Cookies 1006		<a href="#">Edit</a>	<a href="#">Delete</a>
<b>Technical Support</b> Ring Pattern: Cyclic No of Cycles: 1 Busy Forward: 444 Auto Attendant No Answer Forward: 444 Auto Attendant Always Forward: 444 Auto Attendant Internet Outage Forward:	2004		Sarah Thomas 1003		<a href="#">Edit</a>	<a href="#">Delete</a>

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

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

Home > Phone System > Ring Groups > Edit Ring Group

Enter keyword  [Search](#)

[Help](#)

**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > **Ring Groups**
- > Music on Hold
- > Call Queues
- > Branches
- > Switchboard
- > Company Settings
- > Number Transfer Request
- > Call Recording
- > Edit Voicemail / Fax Notifications
- > Group Call Pickup
- > Call Park Extensions

**Edit Ring Group**  
Edit your Ring Group and then click **Save**

**Ring Group Details**

Ring Group Name:

Ring Group Extension:

Ring Group Caller ID:

Ring Pattern:

Branch:

Cost Center Name:

Receptionist Type:

Number of Cycles:

Voicemail Password:

Warning: Any updates to voicemail password must adhere to the minimum enforced length of 4 digits.

If all lines are busy, forward immediately to:

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

Immediately Forward Calls to:

Internet Outage Forward:

**Ring Pattern**

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

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

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

5. 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**.

Ring Groups <span style="float: right;">Help</span>				
Ring Groups allow you to group a number of extensions together to share distribution of incoming calls				
<a href="#">Create Ring Group</a>   <a href="#">Delete All Ring Groups</a>				
Ring Groups	Group Extension	Incoming	Extensions	Action
<b>CUSTOMER SUPPORT</b> Ring Pattern: Cyclic No of Cycles: 3 Busy Forward: 555 Voice Mail No Answer Forward: 555 Voice Mail Always Forward:	2002		Becky Carmichael 1002 Ron Nader 1007 Shirley Beckmann 1004	Edit <b>Delete</b>

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.

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

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

Home > Phone System > Music on Hold Library

Enter keyword

**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- Music on Hold**
- > Company Settings
- > Number Transfer
- > Call Recording
- > Edit Voicemail / Fax Notifications

**Music on Hold Library** Help

Select hold music from 8x8's standard library or upload your own licensed file. For professionally-recorded greetings and hold music, visit our [Audio Production Store](#).

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	All		09-26-2011	<input checked="" type="checkbox"/>	Play
Bright Vision -Contemporary	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Groovin -Jazz	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Into the Blue -Contemporary	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Lift -Contemporary	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Port of Peace -Jazz	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play

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

### Select Default Music on Hold for Extensions

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

**Music on Hold Library** Help

Select hold music from 8x8's standard library or upload your own licensed file. For professionally-recorded greetings and hold music, visit our [Audio Production Store](#).

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	All		09-26-2011	<input checked="" type="checkbox"/>	Play
Bright Vision -Contemporary	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Groovin -Jazz	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Into the Blue -Contemporary	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Lift -Contemporary	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play
Port of Peace -Jazz	Standard	5.50MB 05:00	None	Select	09-26-2011	<input checked="" type="checkbox"/>	Play

- Review the music listed. To hear a sample, click **Play**.
- 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.

**Upload New Music on Hold** Help

---

**Accepted Formats**     .au, .wav, .vox and .mp3

**File Restrictions**     Upload one file at a time; No larger than 10MB  
(All uploaded files will be converted to .au formats)

**File Name**

+ Add...

**Set As Default**

If checked, this will become the default hold music for your phone system.

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	<input checked="" type="checkbox"/>	Play
Jazz Music (Jazz).mp3	Custom	5.50MB 05:45	All		08-29-2011	<input type="checkbox"/>	Play   Delete
		5.50MB		Select	08-29-2011	<input checked="" type="checkbox"/>	Play

## 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:

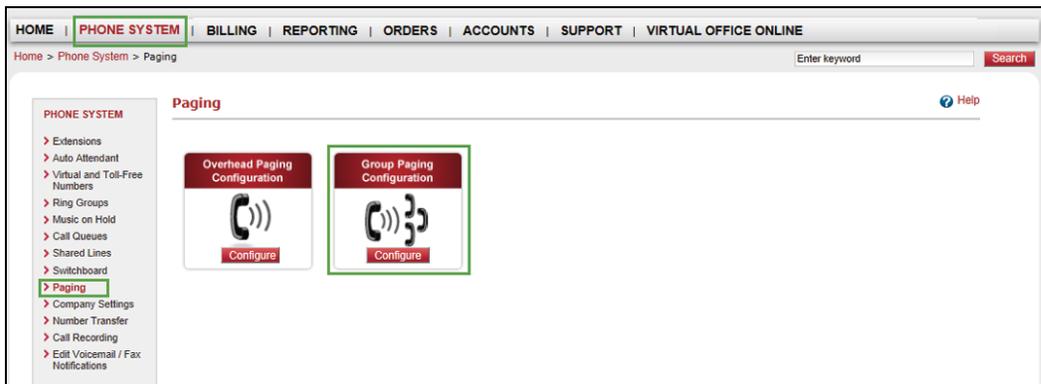


- Polycom firmware version 4.0 or higher is required.
- Group paging uses IP multicast to send group pages to registered phones. This technology requires that all phones in a group page must have access to the same multicast IP address. In most cases, this requires that all phones receive their IP address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

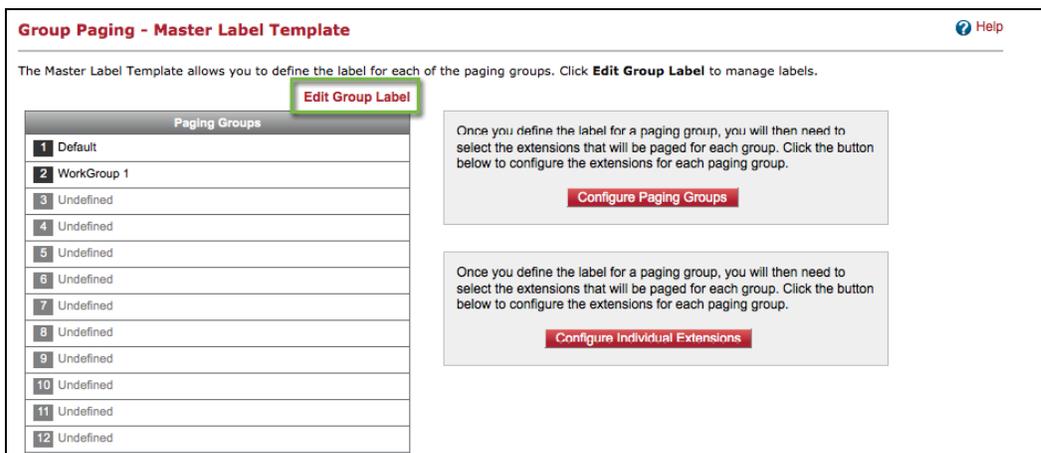
Before using group paging, each telephone participant must be configured.

### 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**.

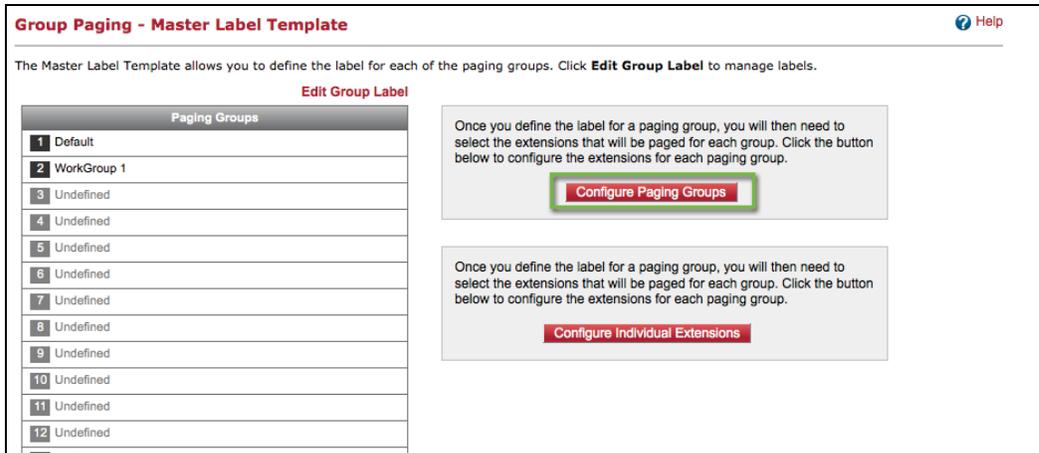


4. To create a name or label for the group, click the **Edit Group Label** link. Then enter a new group name. In our case, we have created a group called **WorkGroup 1**.

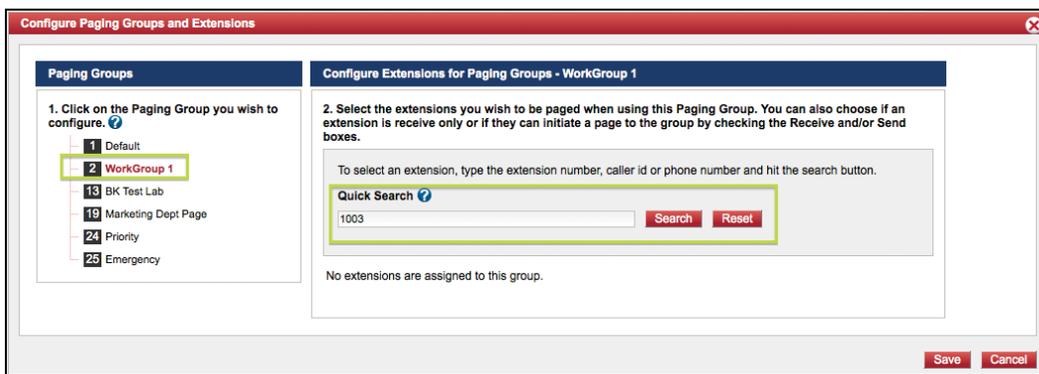


5. Click **Save** at the bottom of the window.

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.



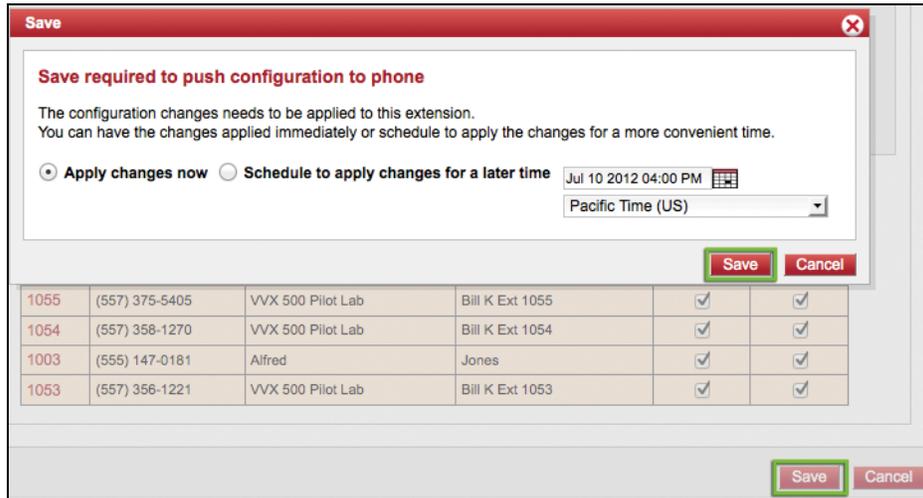
■ **Example 1**

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.

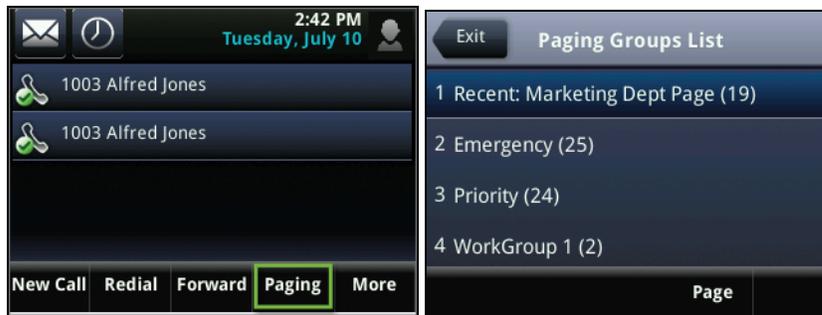
 **Note:** You cannot unsubscribe from a **Priority** or **Emergency** group. A Priority page interrupts **Normal** pages or active calls. An Emergency page will interrupt Normal pages, Priority pages, and active calls and plays out at near maximum volume even if **Do Not Disturb (DND)** is enabled.

■ **Example 2**

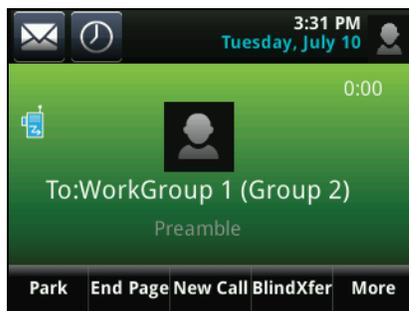
In this example, the user has configured extensions 1003, 1055, 1054, and 1053, and can now save the configuration. Users are given the option to save now or save at a time when it is more convenient to restart the phone.



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.

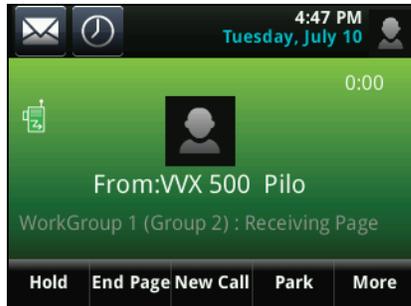


Making a page from a Polycom VVX500 shows a preamble screen. During the preamble, the phone has located all the phones in the page and is sending a short tone to all the phones in the group page.



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**.

Ext	Phone Number	First Name	Last Name	Voicemail Notification	Voicemail-to-Email Address	Fax Notification	Fax-to-Email Address Add up to 5 email addresses
1001	(210) 500-1794	John	Smith	Attachment, Delete Orig. VM	nalini@8x8.com		
1002	(210) 500-1795	Rob	Shasta	Attachment Only	mfadaee@8x8.com		
1003	(850) 000-0000	Unassigned	Unassigned	Attachment Only	nalini@8x8.com		
1004	(850) 000-0010	Unassigned	Unassigned	Attachment Only	nalini@8x8.com		

\* When using the 'Attachment, Delete Orig. VM' notification option, customer assumes risk that a Voicemail can be lost if their email is mishandled for any reason.

Save Cancel

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**.

The screenshot shows the 8x8 Account Manager interface. The top navigation bar includes 'HOME', 'PHONE SYSTEM', 'BILLING', 'REPORTING', 'ORDERS', 'ACCOUNTS', 'SUPPORT', and 'VIRTUAL OFFICE ONLINE'. The 'PHONE SYSTEM' menu is expanded, and 'Paging' is selected. The 'Paging' page displays two configuration options: 'Overhead Paging Configuration' and 'Group Paging Configuration', each with a 'Configure' button. The 'Overhead Paging Configuration' button is highlighted with a green box.

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

The screenshot shows the 'Overhead Paging' configuration page. It includes a table with the following data:

Service Type	Extension	MAC ID	Status	Password	Service Address	Actions
Overhead Paging	1008	003004112244	Active	****	810 MAUDE AVE W, SUNNYVALE CA 94085-2910 USA	Edit

The 'Edit' button in the Actions column is highlighted with a green box. Below the table, there is a note: 'Note: If your overhead paging system device has a dip switch that can toggle between **Standard Mode** and **Trunk Mode**, please be sure it is set to **Trunk Mode**. For more help setting up your overhead paging service, contact 8x8 Support at 888-898-8733.'

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

- Change the service address information, if applicable.

**Change Password**

Change Overhead Paging

New Password

Confirm Password

Change Service Address

Country\*  
United States

Street Number\*  
810

Pre-Directional Street Name\* Street Name Suffix Post-Directional  
W - West MAUDE Avenue

Secondary Location Unit/Other  
Unit/Other

City\* State\* Zip Code\* Zip+4  
SUNNYVALE California 94085 - 2910

Save Cancel

- 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

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

3. Click **Create Call Queue**.

**Account Manager** Company Name: Specialty Cookies | Main Number: (510) 962-5321

Welcome, Phillip Liu | Sign Out  
Email: pliu@8x8.com  
Edit My Profile

Account: Business

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

Home > Phone System > Call Queues

Enter keyword

**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > **Call Queues**
- > Shared Lines
- > Switchboard
- > Paging

**Call Queues** [Help](#)

Your Call Queue service places your callers in line or queue while employees are on other calls. The calls are then distributed in the order received, when the next employee becomes available.

[Create Call Queue](#) [Delete All Call Queues](#)

Group Name	Group Ext.	Primary Extensions	Secondary Extensions	Action
Customer Support Maximum callers in Queue: 10 Interval between calls: 45 seconds	700	Suzy White 1017	Ramana Gottipati 1009	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Human Resources Maximum callers in Queue: 10 Interval between calls: 45 seconds	701	Phillip Liu 1001 Phillip Liu 1004 Ramana Gottipati 1009	Sukhanya Rajan 1002	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

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**.

**Call Queue Details**

Call Queue Name \*

Extension \*  

Time Before Next Call \*   (in seconds)

Max Callers in Queue \*   (max 20)

If queue is full, forward immediately to  

If all agents logged out of call queue or if all agents have server side DND status, immediately forward call to  

Internet Outage Forward  

Immediately Forward Calls to  

Voicemail Password \*  

\*=Indicates Required Fields

**Call Queue**

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.

In 'Agent Assignment' section, select whether to allow agents to log in and log out of their assigned queues. If you select YES, agents can log themselves in and out using their Virtual Office Online accounts or an IP phone. If you select NO, agents will automatically be logged in to the call queue.

NOTE: Agents tell Call Queue they are in DND (Do Not Disturb) mode ONLY from their Virtual Office Online accounts. If agents set DND from their IP Phone, the call queue will still consider them an active agent and send calls to their IP Phone.

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.

**Agents Assignment**

Allow agents to log in and log out from assigned queues.  Yes  No

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, then the next call will be forwarded to the queue voicemail box.

Primary Extension	Receive Voicemail	Secondary Extension
<input type="text" value="Phillip Liu (650) 646-3018 Ext 1001"/>	<input checked="" type="checkbox"/>  	<input type="text" value="John Smith (650) 646-2992 Ext 1003"/>
<input type="text" value="Sarah Thomas (650) 646-3006 Ext 1004"/>	<input checked="" type="checkbox"/>  	

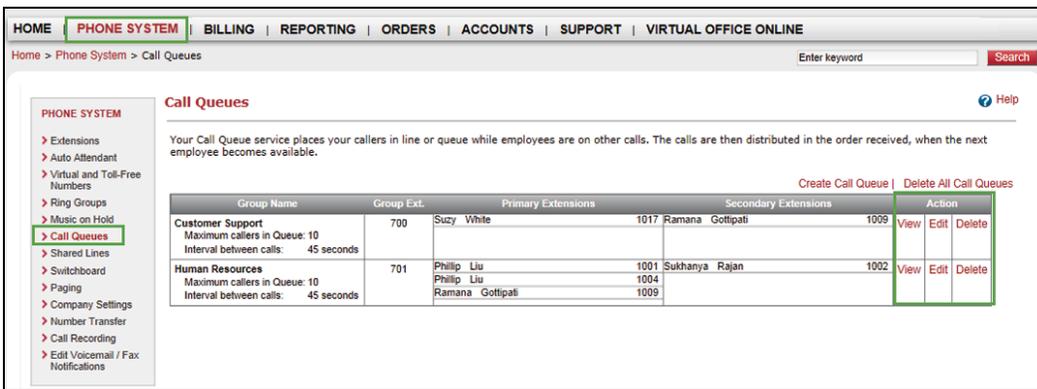
8. Click **Save**.



**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.



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

Home > Phone System > Call Queues

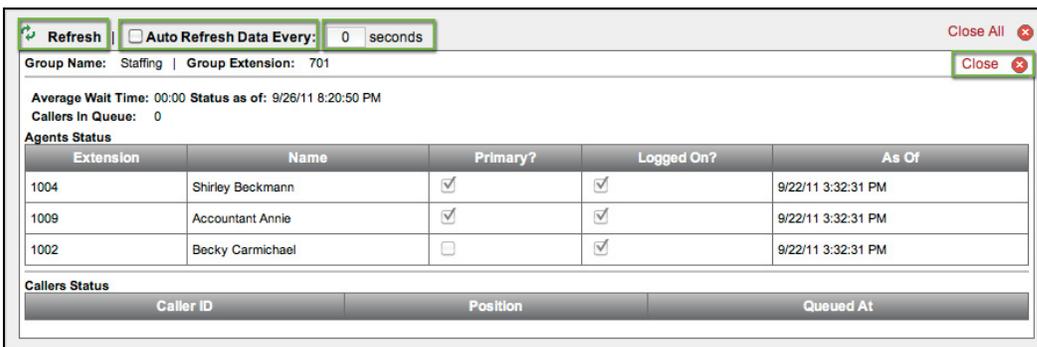
**Call Queues**

Your Call Queue service places your callers in line or queue while employees are on other calls. The calls are then distributed in the order received, when the next employee becomes available.

Create Call Queue | Delete All Call Queues

Group Name	Group Ext.	Primary Extensions	Secondary Extensions	Action
Customer Support Maximum callers in Queue: 10 Interval between calls: 45 seconds	700	Suzy White	1017 Ramana Gottipati	1009 View Edit Delete
Human Resources Maximum callers in Queue: 10 Interval between calls: 45 seconds	701	Philip Liu Philip Liu Ramana Gottipati	1001 Sukhanya Rajan 1004	1002 View Edit Delete

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.



Refresh |  Auto Refresh Data Every: 0 seconds | Close All

Group Name: Staffing | Group Extension: 701 | Close

Average Wait Time: 00:00 Status as of: 9/26/11 8:20:50 PM  
Callers in Queue: 0

**Agents Status**

Extension	Name	Primary?	Logged On?	As Of
1004	Shirley Beckmann	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9/22/11 3:32:31 PM
1009	Accountant Annie	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9/22/11 3:32:31 PM
1002	Becky Carmichael	<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/22/11 3:32:31 PM

**Callers Status**

Caller ID	Position	Queued At
-----------	----------	-----------

## 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.

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

Home > Phone System > Call Queues

Enter keyword

**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > **Call Queues**
- > Shared Lines
- > Switchboard
- > Paging
- > Company Settings
- > Number Transfer
- > Call Recording
- > Edit Voicemail / Fax Notifications

**Call Queues** Help

Your Call Queue service places your callers in line or queue while employees are on other calls. The calls are then distributed in the order received, when the next employee becomes available.

[Create Call Queue](#) | [Delete All Call Queues](#)

Group Name	Group Ext.	Primary Extensions	Secondary Extensions	Action
Customer Support Maximum callers in Queue: 10 Interval between calls: 45 seconds	700	Suzy White	1017 Ramana Gottipati	1009 <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Human Resources Maximum callers in Queue: 10 Interval between calls: 45 seconds	701	Philip Liu Philip Liu Ramana Gottipati	1001 Sukhanya Rajan 1004 1009	1002 <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

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.

- Select whether the primary extension receives voicemail.

**Agents Assignment**

Allow agents to log in and log out from assigned queues.  Yes  No ?

You can assign a group of agents to both a primary and secondary queue extension. The secondary extension group can be setup 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, then the next call will be forwarded to the queue voicemail box.

Primary Extension	Receive Voicemail		Secondary Extension
Phillip Liu (650) 646-3018 Ext 1001	<input checked="" type="checkbox"/>	<span style="color: green;">+</span> <span style="color: red;">-</span>	John Smith (650) 646-2992 Ext 1003 <input checked="" type="checkbox"/> <span style="color: green;">+</span>
Sarah Thomas (650) 646-3006 Ext 1004	<input checked="" type="checkbox"/>	<span style="color: green;">+</span> <span style="color: red;">-</span>	

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

### Delete Call Queues

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

**Account Manager** | Company Name: Specialty Cookies | Main Number: (510) 962-5321

Welcome, Phillip Liu | Sign Out  
Email: pliu@8x8.com | Edit My Profile | Account: Business

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

Home > Phone System > Call Queues

**Call Queues**

Your Call Queue service places your callers in line or queue while employees are on other calls. The calls are then distributed in the order received, when the next employee becomes available.

Create Call Queue | Delete All Call Queues

Group Name	Group Ext.	Primary Extensions	Secondary Extensions	Action
<b>Customer Support</b> Maximum callers in Queue: 10 Interval between calls: 45 seconds	700	Suzy White 1017	Ramana Gottipati 1009	View Edit Delete
<b>Human Resources</b> Maximum callers in Queue: 10 Interval between calls: 45 seconds	701	Philip Liu 1001 Philip Liu 1004 Ramana Gottipati 1009	Sukhanya Rajan 1002	View Edit Delete

- When the dialog box appears to confirm your deletion, click **Delete All**.
- To delete an individual call queue, Click **Delete** in the **Action** column of the call queue you want to remove.

Group Name	Group Ext.	Primary Extensions	Secondary Extensions	Action
<b>Staffing</b> Maximum callers in Queue: 10 Interval between calls: 45 seconds	701	Lobby Manager 1001 Shirley Beckmann 1004 Accountant Annie 1009	Becky Cullen 1002	View Edit <b>Delete</b>
<b>Sales</b> Maximum callers in Queue: 10 Interval between calls: 45 seconds	700	Mahesh Swami 1003 Ron Nader 1007	Accountant Annie 1009	View Edit Delete

## 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.

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

Home > Phone System > Call Queues

Enter keyword

**Call Queues** [Help](#)

Your Call Queue service places your callers in line or queue while employees are on other calls. The calls are then distributed in the order received, when the next employee becomes available.

[Create Call Queue](#) | [Delete All Call Queues](#)

Group Name	Group Ext.	Primary Extensions	Secondary Extensions	Action
Customer Support Maximum callers in Queue: 10 Interval between calls: 45 seconds	700	Suzy White 1017 Ramana Gottipati	1009	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Human Resources Maximum callers in Queue: 10 Interval between calls: 45 seconds	701	Philip Liu Philip Liu Ramana Gottipati	1001 Sukhanya Rajan 1004 1009	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

4. Click **Manage Greetings**.

**IVR Message**

**Initial Queue Greeting** [?](#)

Play this greeting when all agents are busy [Manage Greetings](#)

- Current IVR Setting: Custom Message

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

Play this music while caller waits for next available agent [Manage Greetings](#)

- Current IVR Setting: Custom Message

**Repeating Queue Message** [?](#)

Play this repeating message  second(s) as a caller waits for the next available agent [Manage Greetings](#)

- Current IVR Setting: Custom Message

**Leave voicemail option**  Yes  No  
(Caller may press "2" to leave message).

5. Click **Upload Custom Greeting**.

		<a href="#">Upload Custom Greeting</a>	<a href="#">Record Custom Greeting</a>
Greeting Name	Date Uploaded / Recorded	Current Greeting	Action
System_Default.au	07-13-2011 07:00 AM GMT		<a href="#">Play / Download</a>

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

**Accepted Formats** .au, .wav, .vox and .mp3

**File Restrictions** Upload one file at a time; No larger than 10MB

+ Add...

**File Name**

**Set As Default**  If checked this will become the default greeting for the Queue

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.

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

Home > Phone System > Call Queues Enter keyword  [Search](#)

**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > **Call Queues**
- > Shared Lines
- > Switchboard
- > Paging
- > Company Settings
- > Number Transfer
- > Call Recording
- > Edit Voicemail / Fax Notifications

**Call Queues** [Help](#)

Your Call Queue service places your callers in line or queue while employees are on other calls. The calls are then distributed in the order received, when the next employee becomes available.

[Create Call Queue](#) | [Delete All Call Queues](#)

Group Name	Group Ext.	Primary Extensions	Secondary Extensions	Action
<b>Customer Support</b> Maximum callers in Queue: 10 Interval between calls: 45 seconds	700	Suzy White 1017	Ramana Gottipati 1009	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
<b>Human Resources</b> Maximum callers in Queue: 10 Interval between calls: 45 seconds	701	Phillip Liu Phillip Liu Ramana Gottipati	1001 Sukhanya Rajan 1004 1009	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

Version 1.0

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4. Click **Manage Greetings**.

**IVR Message**

**Initial Queue Greeting** ?

Play this greeting when all agents are busy

- Current IVR Setting: Custom Message

**On Hold Music** ?

Play this music while caller waits for next available agent

- Current IVR Setting: Custom Message

**Repeating Queue Message** ?

Play this repeating message every 30 second(s) as a caller waits for the next available agent

- Current IVR Setting: Custom Message

**Leave voicemail option**  Yes  No  
(Caller may press "2" to leave message).

5. Click **Record Custom Greeting**.

Upload Custom Greeting <b>Record Custom Greeting</b>			
Greeting Name	Date Uploaded / Recorded	Current Greeting	Action
System_Default.au	07-13-2011 07:00 AM GMT		Play / Download

## 6. Enter your phone number if you want your recorded greeting to be the default initial greeting for the queue.

7. Click **Start Recording**.

Please enter a valid phone number and click **Start Recording** to call your phone. Once you pick up your extension, you can record your custom greeting. When you are done click **Stop Recording** below and hang up. You will then be taken back to the **Manage Greetings** section.

**Phone Number**

Enter a valid 10 digit phone number. Example: 4085551212

**Start Recording** **Cancel**

## 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**.

**IVR Message**

**Initial Queue Greeting** ⓘ

Play this greeting when all agents are busy

- Current IVR Setting: Custom Message

[Manage Greetings](#)

**On Hold Music** ⓘ

Play this music while caller waits for next available agent

- Current IVR Setting: Custom Message

[Manage Greetings](#)

**Repeating Queue Message** ⓘ

Play this repeating message every  second(s) as a caller waits for the next available agent

- Current IVR Setting: Custom Message

[Manage Greetings](#)

**Leave voicemail option**  Yes  No  
(Caller may press " 2 " to leave message).

2. Click **Upload Custom Greeting**.

Greeting Name	Date Uploaded / Recorded	Current Greeting	Action
System_Default.au	07-13-2011 07:00 AM GMT		<a href="#">Play / Download</a>

[Upload Custom Greeting](#) [Record 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.

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

+ Add...

File Name

Set As Default  If checked this will become the default greeting 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 On Hold Music or a Message

1. Click **Manage Greetings**.

**IVR Message**

Incoming Call → Internal Queue Greeting → On Hold Music → Repeating Queue Message → Leave Message in Voicemail (optional)

Initial Queue Greeting ?  
 Play this greeting when all agents are busy  
 • Current IVR Setting: Custom Message  
 Manage Greetings

On Hold Music ?  
 Play this music while caller waits for next available agent  
 • Current IVR Setting: Custom Message  
 Manage Greetings

Repeating Queue Message ?  
 Play this repeating message every 30 second(s) as a caller waits for the next available agent  
 • Current IVR Setting: Custom Message  
 Manage Greetings

Leave voicemail option  Yes  No  
 (Caller may press " 2 " to leave message).

2. Click **Record Custom Greeting**.

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

Upload Custom Greeting **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.

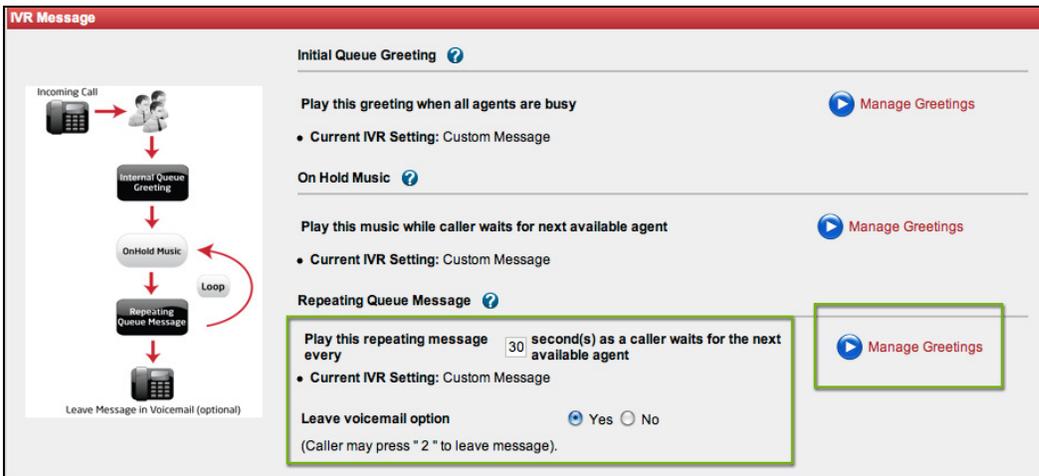
7. Your custom greeting now appears in the list of queue greetings with a , indicating that it is the default greeting for the call queue.

## 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**.

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

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**.

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

### Record a Repeating Queue Message

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

**IVR Message**

**Initial Queue Greeting** ?

Play this greeting when all agents are busy [Manage Greetings](#)

- Current IVR Setting: Custom Message

**On Hold Music** ?

Play this music while caller waits for next available agent [Manage Greetings](#)

- Current IVR Setting: Custom Message

**Repeating Queue Message** ?

Play this repeating message every  second(s) as a caller waits for the next available agent [Manage Greetings](#)

- Current IVR Setting: Custom Message

**Leave voicemail option**  Yes  No  
(Caller may press " 2 " to leave message).

- Click **Record Custom Greeting**.

Upload Custom Greeting <a href="#">Record Custom Greeting</a>			
Greeting Name	Date Uploaded / Recorded	Current Greeting	Action
System_Default.au	07-13-2011 07:00 AM GMT		<a href="#">Play / Download</a>

- Enter your phone number if you want your recorded greeting to be the default greeting for the queue.
- Click **Start Recording**.
- The system calls you at the number you entered. When the phone rings, answer it and follow the voice prompts to record your message.
- Click **Done Recording** when you are finished.
- 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

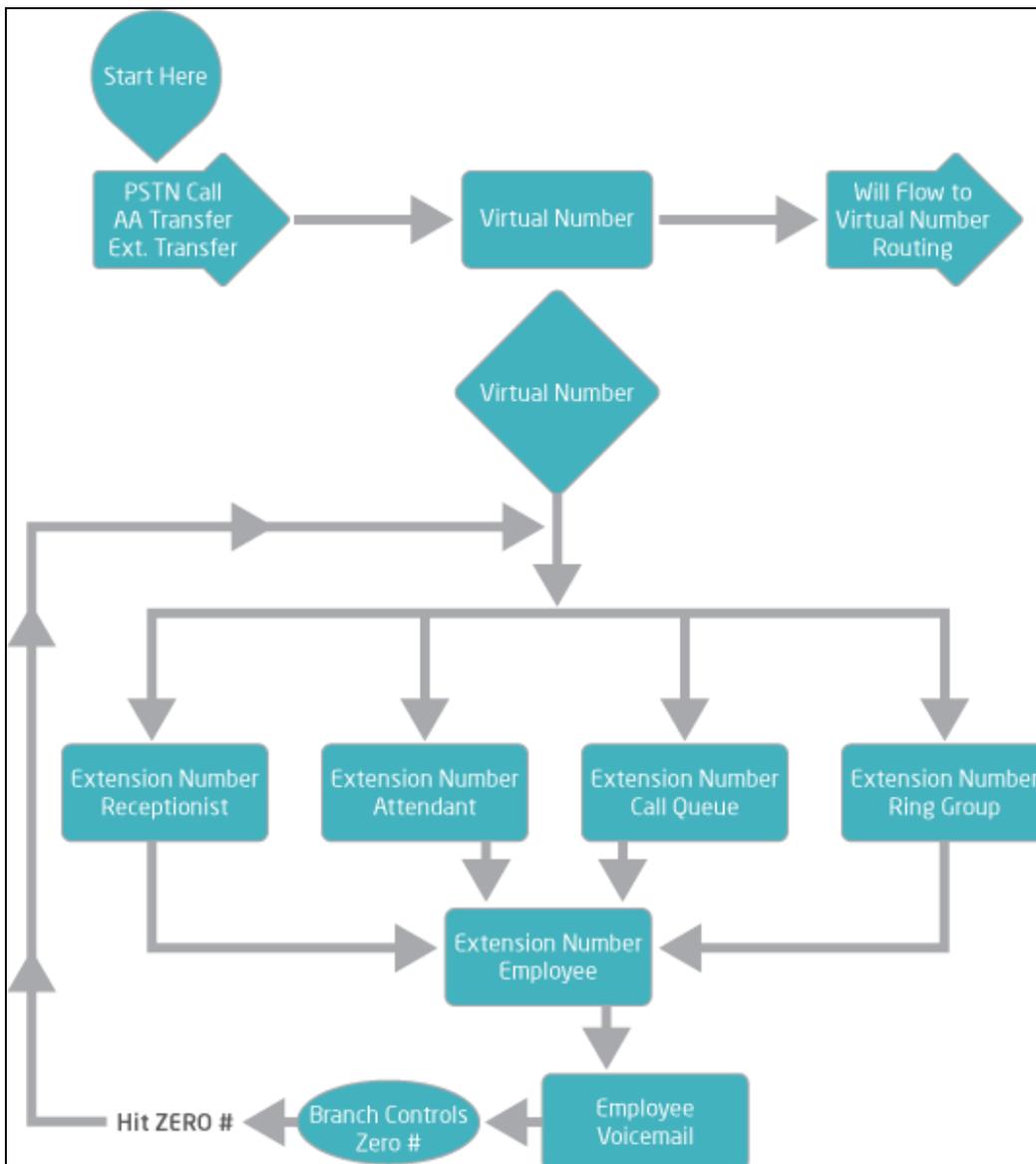
Branch call flow begins with a Virtual Number on your PBX and flows to the receptionist at the branch office. In this case, the receptionist can be a live operator, an Auto Attendant, or several live operators assembled in a ring group or call queue. In summary, a receptionist for Branch Office receives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

Branch Name	# of Ext.	Branch Code	Main Number	Receptionist	Location	Action
-- none selected --	0	-- none selected --	Set Up			
-- none selected --	0	-- none selected --	Set Up			
-- none selected --	0	-- none selected --	Set Up			
-- none selected --	0	-- none selected --	Set Up			

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
<b>Edit My Profile</b>	The primary or secondary administrators who have access to Account Manager can configure the <b>Language</b> setting in <b>Edit My Profile</b> to	User level

Setting	Description	Configured At
	<p>communicate emails in their language of choice.</p> <p>This setting overrides the default PBX or branch language setting. It only applies to the administrator's email communications.</p>	
<b>Account &gt; User Profiles</b>	<p>Configure the <b>Language</b> setting for extension users to communicate emails in their language of choice.</p> <p>This setting in user profile overrides the default PBX or branch language. It only applies to the user's email communications.</p>	User level
<b>Phone System &gt; Company Settings</b>	<p>Configure the <b>Language</b> 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.</p> <p>In the absence of the individual extension user's language of choice, the language setting of branch overrides the PBX language setting.</p>	PBX level
<b>Phone System &gt; Branches</b> (Add-on subscription-based)	<p>Configure the <b>Language</b> setting for users to receive Telephony IVR messages, such as voicemail greetings in the selected language.</p> <p>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.</p>	Branch level
<b>Phone System &gt; Edit Individual Extension</b>	<p>Configure the <b>Language</b> 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.</p> <p>This setting overrides the PBX and branch language setting.</p>	Extension level
	 <p><b>Note:</b> If you need help with setting the user language in bulk, contact 8x8 Support for help.</p>	

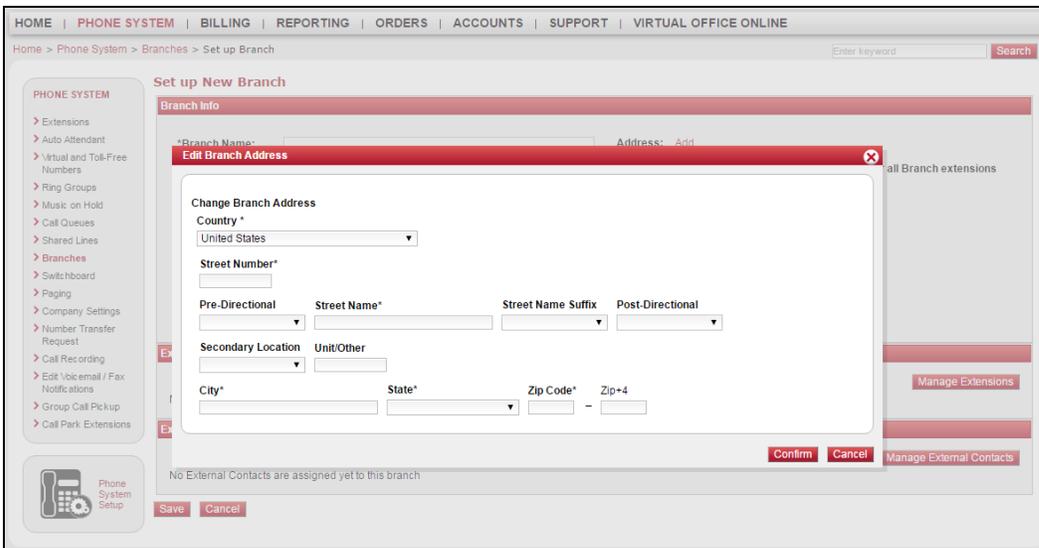
Setting	Description	Configured At
	 <p><b>Note:</b> To access localized versions of 8x8 Virtual Office applications, refer to your computer or device manual to learn how you can change the display language of your operating system.</p>	

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



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

- Enter the branch address.



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

Home > Phone System > Branches > Set up Branch

Set up New Branch

Branch Info

\*Branch Name: Address: Add

Edit Branch Address

Change Branch Address

Country \*  
United States

Street Number\*

Pre-Directional Street Name\* Street Name Suffix Post-Directional

Secondary Location Unit/Other

City\* State\* Zip Code\* Zip+4

No External Contacts are assigned yet to this branch

Confirm Cancel Manage External Contacts

Save Cancel

The address is validated.



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

- 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.

The screenshot shows the 'Edit Branch' configuration page. The 'Branch Code' field is highlighted with a green box and a callout bubble that says 'Fully Qualified Extension'. Below the form is a table of extensions.

Ext	Phone	Name	Department	Receptionist	Location
41003	(408) 555-3663	Alias Curry		Branch Default	
41002	(408) 555-3662	Jim Toreye		Branch Default	

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**.

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

Home > Phone System > Branches > Edit Branch > Manage Extensions

Enter keyword

**Manage Extensions - Mountain View Branch**

**Existing Extensions**

No Extensions are assigned yet to this branch.

**Available Extensions**

To select an extension, type the extension number, caller ID first name, caller ID last name, branch name or phone number and hit the search button.

**Quick Search**

Search by name, ext, branch name or phone number

Select the extensions and click add button

<input type="checkbox"/>	Ext	Phone	Name	Branch	Department	Location
<input checked="" type="checkbox"/>	1019	(557) 629-9660	qatestblee2 qatestblee2	Branch1_RENAME		
<input checked="" type="checkbox"/>	1012	(557) 293-7578	QA Test234	Branch1_RENAME		
<input checked="" type="checkbox"/>	1009	(555) 901-6721	qatestblee2 1009	Branch3		
<input checked="" type="checkbox"/>	110	(408) 532-5334	qatestblee2 110	Hugo Test		
<input checked="" type="checkbox"/>	109	(408) 532-5338	qatestblee2 109	Hugo Test		
<input checked="" type="checkbox"/>	1010	(557) 292-4405	Lanore Test123	Lanore Test Branch		Los Gatos
<input type="checkbox"/>	102	(408) 627-8674	San Francisco 102	San Francisco Branch		
<input type="checkbox"/>	1014	(557) 376-2116	Austin 1014	Austin Branch		
<input type="checkbox"/>	103	(408) 532-5374	New York 103	New York Branch		

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.

**Edit Toll-Free/Virtual Number**

Please select the destination for this number

**Number Type** Virtual Number

**Phone** (510) 248-1000

**Destination** Ext 1040 - Unassigned Unassigned, (209) 315-1007

**Optional Caller ID Name:** First Last

**Allow User Access to Optional Caller ID**  ?

---

**Change Service Address**

**Country \***  
United States

**Street Number\***  
810

**Pre-Directional** **Street Name\*** **Street Name Suffix** **Post-Directional**  
W - West MAUDE Avenue

**Secondary Location** **Unit/Other**

**City\*** **State\*** **Zip Code\*** **Zip+4**  
SUNNYVALE California 94085 - 2910

**Confirm** **Cancel**



**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.

**Manage Extensions - Mountain View Branch**

Existing Extensions

Change Branch ✘

Name	Department	Location	Change Branch	Remove from Branch
Austin 1014				✘
qatestblee2 qatestblee2				✘
qatestblee2 qatestblee2				✘
Lanore Test123		Los Gatos		✘

Change Branch dropdown menu items:

- Change Branch
- Specialty HQ
- Hugo Test
- Branch1\_RENAME
- Branch2
- San Francisco Branch
- Austin Branch
- New York Branch
- test to delete
- McLarens Young International
- Duplicate Ext Bug Test
- Branch3
- Lanore Test Branch

- **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.

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

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

Home > Phone System > Ring Groups > Edit Ring Group

Enter keyword

**PHONE SYSTEM**

- Extensons
- Auto Attendant
- Virtual and Toll-Free Numbers
- Ring Groups**
- Music on Hold
- Call Queues
- Branches
- Switchboard
- Company Settings
- Number Transfer Request
- Call Recording
- Edit Voicemail / Fax Notifications
- Group Call Pickup
- Call Park Extensions

**Edit Ring Group**

Edit your Ring Group and then click **Save**

**Ring Group Details**

Ring Group Name:

Ring Group Extension:

Ring Group Caller ID:

Ring Pattern:

Branch:

Cost Center Name:

Receptionist Type:

Number of Cycles:

Voicemail Password:

Warning: Any updates to voicemail password must adhere to the minimum enforced length of 4 digits.

If all lines are busy, forward immediately to:

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

Immediately Forward Calls to:

Internet Outage Forward:

**Ring Pattern**

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

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

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

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

#### To assign a call queue extension to a branch:

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

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

The screenshot displays the 'Edit Call Queue' configuration interface. The top navigation bar includes 'HOME', 'PHONE SYSTEM', 'CONTACT CENTER', 'ORDERS', 'ACCOUNTS', 'SUPPORT', and 'VIRTUAL OFFICE ONLINE'. The breadcrumb trail is 'Home > Phone System > Call Queues > Edit Call Queue'. The left sidebar, titled 'PHONE SYSTEM', lists various settings, with 'Call Queues' highlighted in green. The main content area, titled 'Edit Call Queue', contains the following fields:

- Call Queue Name \***: Delivery
- Extension \***: 1000
- Time Before Next Call \***: 45 (in seconds)
- Max callers in Queue \***: 10 (max 20)
- Branch**: Branch 1
- Cost Center Name**: [Empty]
- Receptionist Type**: [Dropdown menu]
- If queue is full, forward immediately to**: Voicemail Ext 555
- If all agents logged out of call queue or if all agents have server side DND status, immediately forward call to**: Voicemail Ext 555
- Internet Outage Forward**: Voicemail Ext 555
- Immediately Forward Calls to**: None
- Voicemail Password \***: [Empty]

A warning message states: 'Warning: Any updates to voicemail password must adhere to the minimum enforced length of 4 digits.' A 'Call Queue' help section on the right explains that a call queue places callers in a queue while agents handle other calls. A note at the bottom indicates that agents must be in DND (Do Not Disturb) mode (ON) from their Virtual Office Online accounts for the call queue to function correctly.

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.

**Edit Branch**

**Branch Info**

\*Branch Name:  Address: [Add](#)

Main Number:

Receptionist Type:

Receptionist:

Admin(s): -- none selected --

**Extensions**

Ext	Phone	Name	Department
1014	(557) 376-2116	Austin 1014	
1019	(557) 629-9660	qatestblee2 qatestblee2	
1018	(557) 629-2581	qatestblee2 qatestblee2	
1020	(101) 131-6679	qatestblee2 qatestblee2	

Branch Default

IP PHONES Ext 2001

MGCP Ext 2002

VE RG Ext 2003

ALL RG Ext 2004

**Support Tier 1 Ext 2005**

Specialty Cookies Ext 444

AA #2 Ext 4440

AA #3 Ext 4441

AA #4 Ext 4442

ReynaTest Ext 4443

Branch2Sam2\_AA4444 Ext 4444

Lanore Branch Test Ext 4445

TestAAupload Ext 4446

Branch1Sam1\_AA4447 Ext 4447

San Francisco Branch Ext 4448

New York Branch Ext 4449

Austin Branch Ext 4450

San Francisco 102 (408) 627-8674 Ext 102

New York 103 (408) 532-5374 Ext 103

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.

**Auto Attendant Information**

Auto Attendant AA #2: \_\_\_\_\_ Profile Name: with Greetings

Extension: 4440 Time Zone: US/Pacific

Branch: Austin Branch

---

**Hours of operation**

---

**Business Hours Rules and Recordings**

Below are your business hours rules and recordings menu settings for this profile. Test Menu

**Auto Attendant at a Glance**

**Business Hours**

- 0 Company Directory
- 1 Conference Bridge
- 2 Dial By Extension
- 3 Dial By Name
- 4 > AA #3
- 5 > 621 : Sales
- 6 > 1001:qatestblee2 1001
- 7 > 2001 : IP PHONES
- 8 Voice Mail System
- 9 No Action

**Auto Attendant: Main Menu**

Use the menu options below to define the action the Auto Attendant should take when the option is selected by the user. Use the + and - buttons to add and delete menu options. Save

**Dialpad Key Settings** Re-order Dialpad Keys

Press	Description	Call Routing
Key 0		Company Directory
Key 1		Conference Bridge
Key 2		Dial By Extension
Key 3		Dial By Name
Key 4		Transfer to Auto Attendant
Key 5		Transfer to Call Queue
Key 6		Transfer to Extension

Call Routing dropdown options:

- All Extensions
- All Extensions
- Branch1\_RENAME
- Branch2
- Branch3
- Hugo Test
- Lanore Test Branch
- test to delete
- San Francisco Branch
- Austin Branch
- New York Branch
- Mountain View Branch
- McLarens Young International
- Duplicate Ext Bug Test
- Specialty HQ

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

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



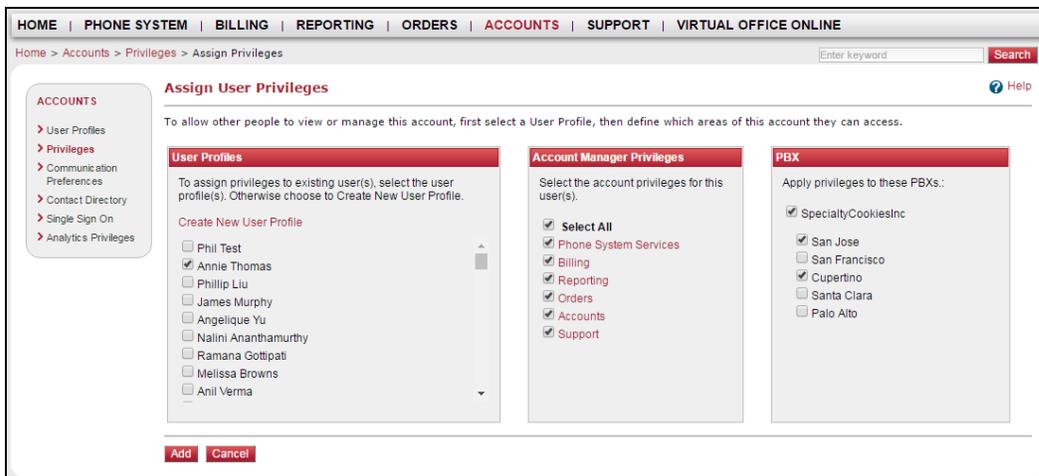
**Note:** All the options mentioned above within an auto attendant must point to the same branch.

## 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:

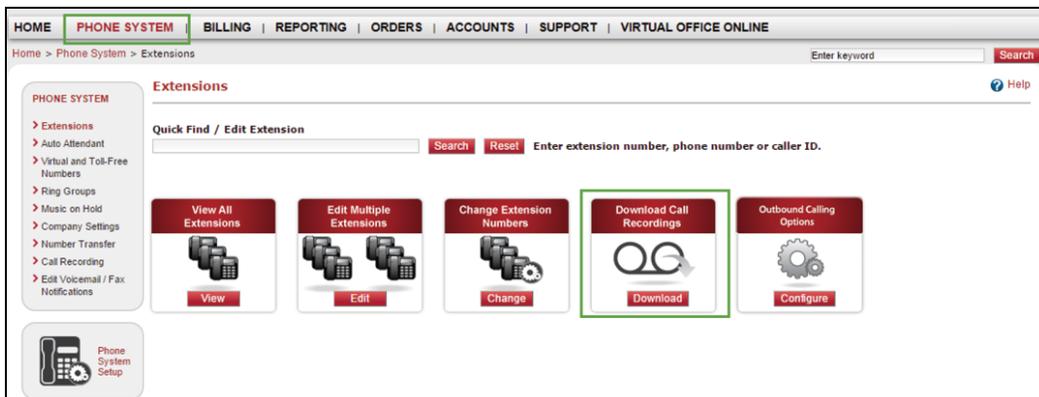
- Service extensions assigned to the branch
- Service extensions available for assignment to the branch (applicable if you have the privileges for service extension features)

## 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.

**Download Call Recordings** ? Help

Use the filter below to search for Virtual Office Pro extension call recordings. You must enter at least one search option.

**Search Options**

**Date**

**Start Date**  
Sep 29 2011 08:12 AM

**End Date**  
Sep 29 2011 08:12 AM

**Time Zone**  
US/Eastern

**Extensions**

Select All

Accountant Annie (555) 792-4996 EXT 1009

Becky Carmichael (650) 646-2988 EXT 1002

Lobby Manager (650) 646-3018 EXT 1001

Diana Jay Smith (555) 648-0703 EXT 1006

Ron Nader (408) 627-8740 EXT 1007

Shirley Beckmann (650) 646-3006 EXT 1004

Mahesh Suresh (561) 646-2988 EXT 1003

**Search** **Reset**



**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**.

Download Recordings   Delete Recordings							Recordings Per Page: 100	
Phone System Setup		From	To	Call Recording Date and Time	Call Direction	Call Duration	Recording Size (MB)	
<input type="checkbox"/>	Rob Shasta	1020		01-27-2017 19:12:03	Outbound	00:03:38	1.6624	Play / Download
<input type="checkbox"/>	Sarah Thomas	1023		01-27-2017 19:07:29	Outbound	00:04:01	1.8417	Play / Download
<input type="checkbox"/>	Lisa Black	1029		01-27-2017 19:05:32	Outbound	00:01:21	0.6177	Play / Download

## 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.

**Account Manager**  
 Company Name: Specialty Cookies | Main Number: (510) 962-5321  
 Welcome, Phillip Liu | Sign Out  
 Email: pliu@8x8.com  
 Account: Business

HOME | PHONE SYSTEM | 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 Extensions**.

[Edit Multiple Extensions](#) | 
 [Change Extension Number](#) | 
 [Download Call Recordings](#) | 
 [Download Extensions \(csv\)](#) | 
 [Download Activation Codes](#)

Actions	Status	Service Type	Ext	Phone Number	Caller ID First Name	Caller ID Last Name	Devices	Voicemail-to-Email Address
<a href="#">Edit</a>	Active	Unlimited Extension Pro	1016	(408) 329-7148	Shantanu	Garud	Virtual Office Softphone	shantanu.garud@8x8.com
<a href="#">Edit</a>	Active	Unlimited Extension Pro	1017	(557) 301-0101	Sarah	Thomas	Virtual Office Softphone	nalini.ananthamurthy@8x8.com
<a href="#">Edit</a>	Active	Unlimited Extension Pro	1018	(408) 329-7149	David	Leach	Virtual Office Softphone	david.leach@8x8.com
<a href="#">Edit</a>	Active	Unlimited Extension Pro	1019	(408) 329-7150	Marlon	Dulay	Virtual Office Softphone	marlon.dulay@8x8.com
<a href="#">Edit</a>	Active	Unlimited Extension Pro	1020	(408) 329-7151	Dave	Provenza	Virtual Office Softphone	dave.provenza@8x8.com
<a href="#">Edit</a>	Active	Unlimited Extension Pro	1021	(408) 329-7156	Erik	Smith	Virtual Office Softphone	erik.archer@8x8.com
<a href="#">Edit</a>	Active	Unlimited Extension Pro	1022	(408) 329-7159	Mike	Reinhart	Virtual Office Softphone	mike.reinhart@8x8.com
<a href="#">Edit</a>	Active	Unlimited Extension Pro	1023	(408) 329-7160	Christine	Richardson	Virtual Office Softphone	christine.richardson@8x8.com

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

**Extension Settings**

Time Zone: US/Eastern  
 Preferred Codec: G.729A (30 kbps)  
 Emergency Service Address: 2125 ONEL DR, SAN JOSE, CA 95131-2032  
 Outbound Calling Options: Allow International Calling  
 Language: PBX Default

Travelling Outside the Country  
 Hide in Auto Attendant Directory  
 Allow Music on Hold Selection  
 Permanent Caller ID Blocking

View Billing Statements  
 Allow Social Networking  
 Enable Inbound Caller ID  
 ?

**Barge Permissions**

Configure Barge permissions for this extension View, Edit, Delete, Barge List(s): [Manage Barge List\(s\)](#)

Monitor Tone Enabled  
 Barge Password Enabled

Select which extensions can be monitored. All List None

Save Changes Cancel

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	<ul style="list-style-type: none"> <li>■ <b>All</b> allows barging in on all extensions.</li> <li>■ <b>List</b> allows barging in on extensions in a specific barge list.</li> <li>■ <b>None</b> disables barging.</li> </ul>

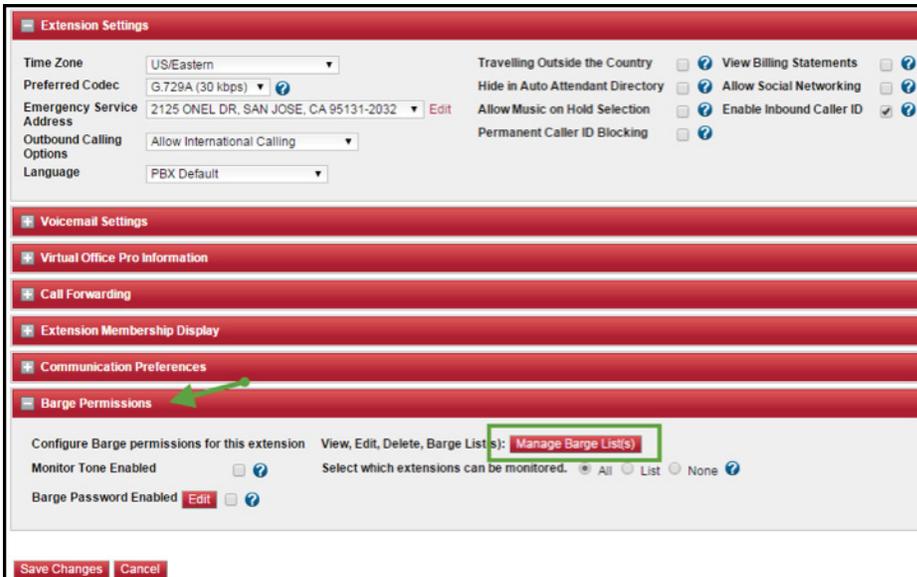
7. Click **Save Changes**.

### Create a Barge List

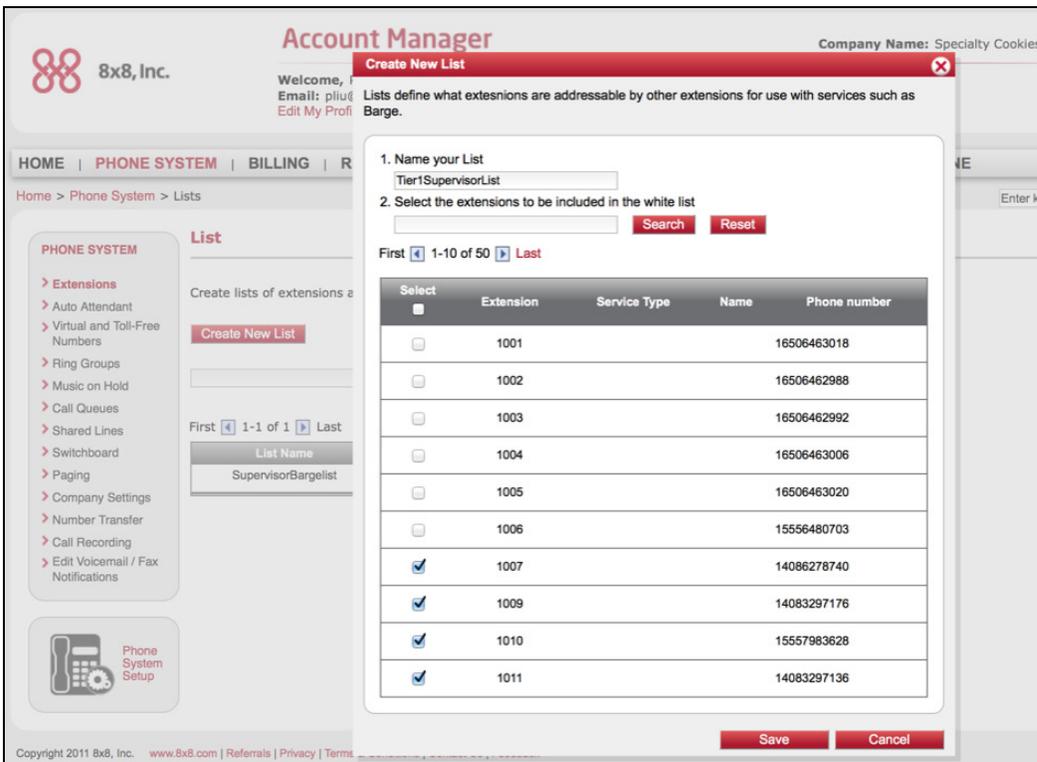
A barge list includes extensions which you can barge in on. You can create a barge list and assign it to an extension with barge permissions. It allows the extension user to barge in on extensions in the barge list.

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**.

The screenshot shows the 8x8 Account Manager interface. The user is logged in as Bill Korbe. The navigation menu includes HOME, PHONE SYSTEM, BILLING, REPORTING, ORDERS, ACCOUNTS, SUPPORT, and VIRTUAL OFFICE ONLINE. The current page is 'Extensions' under the 'PHONE SYSTEM' section. A search bar is present with the text 'Enter keyword'. Below the search bar, there are several action buttons: 'View All Extensions', 'Edit Multiple Extensions', 'Change Extension Numbers', 'Download Call Recordings', 'Line Key Configuration', and 'Outbound Calling Options'. The 'Line Key Configuration' button is highlighted with a green box. The footer contains copyright information for 8x8, Inc. and a support phone number: (888) 898-8733.

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	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:01 PM (PST)	Configure Line Keys
1010	(415) 508-5069	BillKorbe	1010	Pilot-Test-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.

The screenshot shows the 'Configuration' page in the Account Manager. At the top, there are navigation tabs: BILLING | REPORTING | ORDERS | MY ACCOUNT | SUPPORT | VIRTUAL OFFICE ONLINE. Below the navigation is a search bar with the text 'Enter keyword' and a 'Search' button. The main heading is 'Configuration' with a 'Help' icon. A message states: 'The extensions that are eligible for Line Key Configuration through the Account Manager.' Below this is a table with columns: Extension Number, Caller ID First Name, Caller ID Last Name, Device, Reboot Status, Date and Time, and Action. A modal dialog box titled 'Configure Line Keys' is overlaid on the table. The dialog contains the following text: '8x8 has a new Line Key feature to backup each phone's local Contact Directory. Account Manager can now allow centralized line key editing. In order to access the Line Configuration page with the new features, users have to make one update to their local phone Contact Directory on their set to initiate that backup. Please click on the Confirm button if you have already done so. Otherwise, please click on No button and try the centralized line key editing feature again later.' At the bottom of the dialog are 'Confirm' and 'No' buttons.

Extension Number	Caller ID First Name	Caller ID Last Name	Device	Reboot Status	Date and Time	Action
148-2556	BillKorbe 1005	PolycomTest	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:01 PM (PST)	Configure Line Keys
808-5059	BillKorbe 1010	Pilot-Test-550	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:02 PM (PST)	Configure Line Keys
356-1221	VVX 500 Pilot Lab	Bill K Ext 1053	Polycom VVX 500	Rebooted	2012-06-27 03:23 PM (PST)	Configure Line Keys
358-1270	VVX 500 Pilot Lab	Bill K Ext 1054	Polycom VVX 500	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
375-5405	VVX 500 Pilot Lab	Bill K Ext 1055	Polycom VVX 500	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
131-8379	VVX 400	Lab Ext 1057	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
131-8383	Bill Korbe	VVX Test 2010	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
313-3281	VVX 400 Lab	1059	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
123-9076	BK Lab	1060	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
632-5383	BK Lab	1061	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
944-1471	BK Lab	VVX 600 x1066	Polycom VVX 600	Rebooted	2014-04-29 09:44 AM (PST)	Configure Line Keys
945-1290	BK Lab	VVX 600 x1067	Polycom VVX 600	Rebooted	2014-04-28 10:19 AM (PST)	Configure Line Keys

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.

The screenshot shows the 'Line Key Configuration' page for Extension 1066. The breadcrumb trail is: Home > Phone System > Line Key Configuration > Extension 1066. The page title is 'Line Key Configuration for Extension 1066 - BK Lab VVX 600 x1066 - Polycom VVX 600'. The plan is 'Virtual Receptionist 14'. On the left is a 'PHONE SYSTEM' sidebar with a tree view containing: Extensions, Auto Attendant, Virtual and Toll-Free Numbers, Ring Groups, Music on Hold, Call Queues, Paging, Company Settings, Number Transfer, Call Recording, Edit Voicemail / Fax Notifications, and Cordless Devices. The main area shows a grid of keys for 'Ext. 1066'. Each key has a 'Line Appearance' icon and a status indicator. On the right, there is a list of key types: 'Line Appearance' (3 available), 'BLF' (14 available), and 'Speed Dial' (13 available). A 'Configure SideCar' link is at the bottom right. A note at the top right says: 'Double-click (or) Drag and drop the Line Key types onto the unassigned keys to configure.'

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.

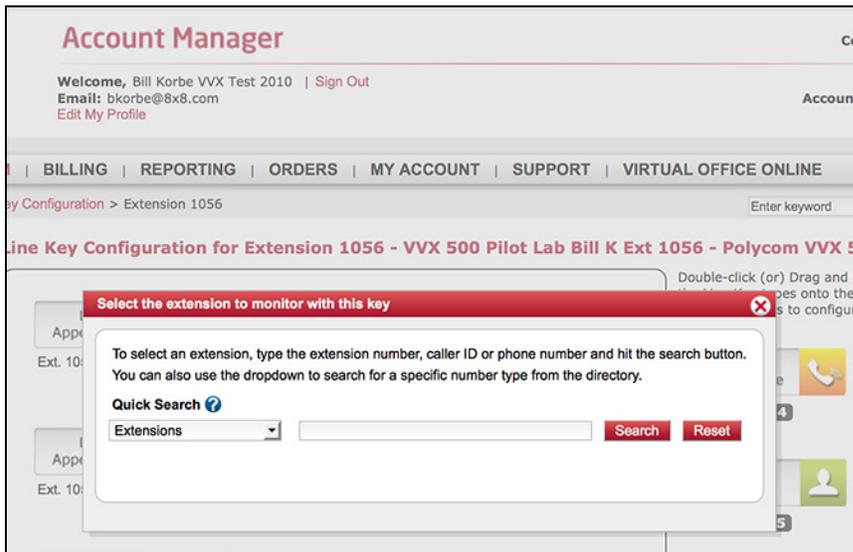
**Line Key Configuration for Extension 1056 - VVX 500 Pilot Lab Bill K Ext 1056 - Polycom VVX 500**  
 Plan : Virtual Receptionist 6

Double-click (or) Drag and drop the Line Key types onto the unassigned keys to configure.



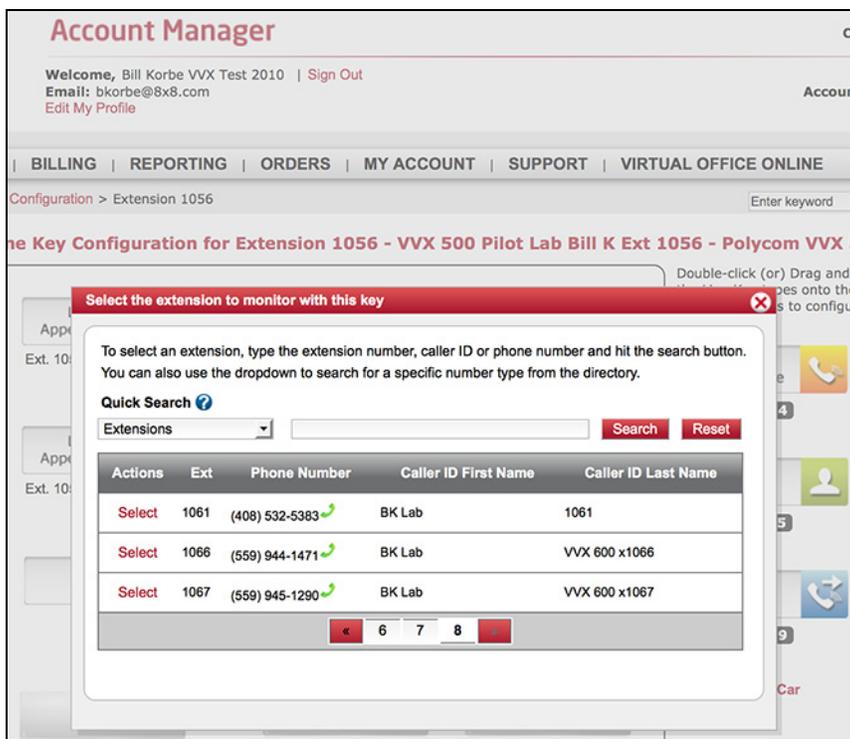
**Note:** Chrome does not support the drag-and-drop functionality. Click the key for the key type options.

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

- At the prompt, select an extension to monitor.
- 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.

**Select the number for this speed dial key** ✕

Enter extension, or type the phone number or caller ID and click Search.  
Use the dropdown to search the directory for a specific number type.  
**(Search is optional, for Internal extensions only)**

**Quick Search** ?

Extensions

**Contact Phone Number**

**First Name**

**Last Name**

**Label**  (12 characters maximum)

**Ring Type**

**Auto Divert**

**Divert Contact To**

**Auto Reject**

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.

The screenshot displays the 'Account Manager' interface for 8x8, Inc. The user is logged in as Bill Korbe, VVX Test 2010. The main navigation bar includes links for HOME, PHONE SYSTEM, BILLING, REPORTING, ORDERS, MY ACCOUNT, SUPPORT, and VIRTUAL OFFICE ONLINE. The current page is 'Line Key Configuration for Extension 1056 - VVX 500 Pilot Lab Bill K Ext 1056 - Polycom VVX 500'. The interface shows a grid of line key configuration options for Extension 1056, including Line Appearance, BLF Pickup Enabled, and Speed Dial. A 'Configure SideCar' button is highlighted in a green box at the bottom right of the grid. The right sidebar contains a list of available line key types: Line Appearance (3 available), BLF (4 available), and Speed Dial (6 available).

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

The screenshot shows the 8x8 Account Manager interface. At the top, it says "Account Manager" and "Company Name: polycombk". Below that, it says "Welcome, Bill Korbe VVX Test 2010 | Sign Out" and "Email: bkorbe@8x8.com | Edit My Profile". There is a navigation bar with links: HOME | PHONE SYSTEM | BILLING | REPORTING | ORDERS | MY ACCOUNT | SUPPORT | VIRTUAL OFFICE ONLINE. Below the navigation bar, there is a search bar and a breadcrumb trail: Home > Phone System > Line Key Configuration > Extension 1056. The main content area is titled "Line Key Configuration for Extension 1056 - VVX 500 Pilot Lab Bill K Ext 1056 - Polycom VVX 500". On the left, there is a "PHONE SYSTEM" sidebar with a list of options: Extensions, Auto Attendant, Virtual and Toll-Free Numbers, Ring Groups, Music on Hold, Call Queues, Paging, Company Settings, Number Transfer, Call Recording, Edit Voicemail / Fax Notifications, and Cordless Devices. The main configuration area has "Previous" and "Next" buttons. In the center, it says "SideCar 1 of 1" and "Page 1 of 3 pages of keys". Below this, there are four key map slots. On the right, there is a list of key types: "Line Appearance" with a telephone icon and "# Available 10", "BLF" with a person icon and "# Available 23", and "Speed Dial" with a telephone icon. A note says: "Double-click (or) Drag and drop the Line Key types onto the unassigned keys to configure."

- For each SideCar 28, three map pages of 28 keys.
  - For each SideCar 40, single map page of 40 keys.
- 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.
  - Follow the process to:
    - Add Line Appearance Key
    - Add Busy Lamp Field Key
    - Add Speed Dial Key
  - Repeat the configuration for all pages of one or more SideCars.



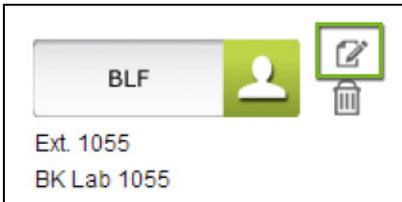
**Note:** Within each page, drag and drop to reposition line keys. This flexibility is limited to SideCars only and not available on the phone.

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

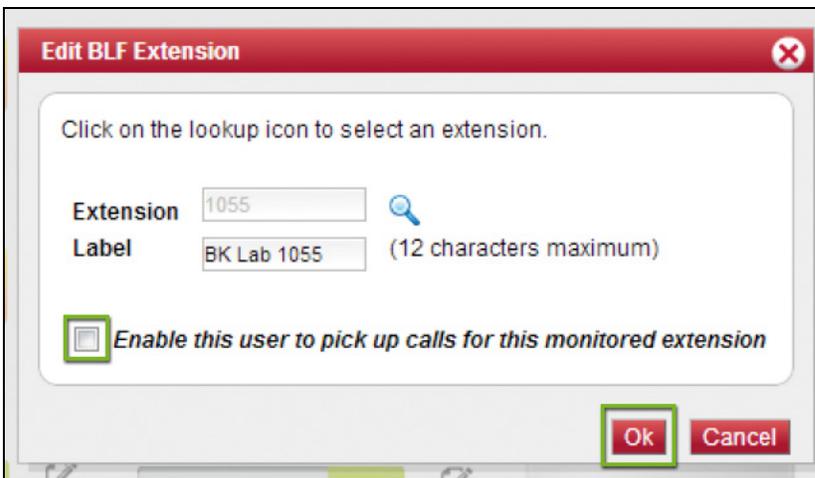
It takes a few minutes for the phone and SideCars to restart.

### Add Call Pickup Option to a BLF Key

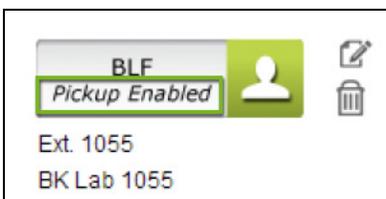
1. To configure **Call Pickup**, select the BLF key you want to enable call pickup for and click to **Edit**.



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.

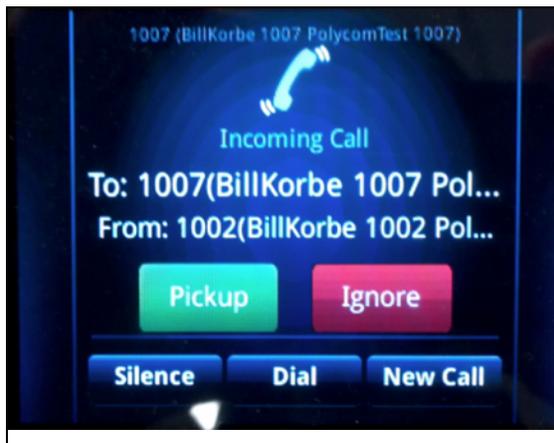
Additional BLF Call Ringing Notifications	Additional BLF Call Ringing Notifications
<p>In addition to the flashing red BLF phone ringing notification, you can optionally enable additional BLF phone ringing alerts. (These alerts will apply to all BLF keys for this extension):</p> <p><input type="checkbox"/> Enable call screen notification    <input type="checkbox"/> Enable call audio tone</p>	<p>In addition to the flashing red BLF phone ringing notification, you can optionally enable additional BLF phone ringing alerts. (These alerts will apply to all BLF keys for this extension):</p> <p><input checked="" type="checkbox"/> Enable call screen notification    <input checked="" type="checkbox"/> Enable call audio tone</p>

- 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)**.

The screenshot shows the 'Manage Extensions' page in the 8x8 Phone System. The navigation bar includes 'HOME', 'PHONE SYSTEM', 'BILLING', 'REPORTING', 'ORDERS', 'ACCOUNTS', 'SUPPORT', and 'VIRTUAL OFFICE ONLINE'. The 'PHONE SYSTEM' menu is expanded, showing 'Extensions' highlighted. Below the menu, there are links for 'Edit Multiple Extensions', 'Change Extension Number', 'Download Call Recordings', 'Download Extensions (csv)', and 'Download Activation Codes'. A table of extensions is displayed with columns for Actions, Status, Service Type, Ext, Phone Number, Caller ID First Name, Caller ID Last Name, Devices, and Voicemail-to-Email Address. The 'Download Extensions (csv)' link is highlighted with a green box.

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

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50
Status	Service Type	Ext	Phone Number	Caller ID First Name	Caller ID Last Name	Voicemail	Voicemail-to-Email	Address	Hide In Auto	Make Int'l Calls	Allow Social	Mark on Hold	Display No. for Outgoing Calls	Time Zone	ESL Service Address																																		
Active	Unlimited Extension	1007	14086278740	Ron	Nader	12123	mader@SpecialtyCookies.com	Y	N	Y	Y	null	US/Mountain	810 W MAUDE AVE SUNNYVALE CA 94085-2910																																			
Active	Basic Extension	1006	16506480703	Specialty	Cookies	9876	drowell@8x8.com	Y	N	Y	Y	null	US/Pacific	810 W MAUDE AVE SUNNYVALE CA 94085-2910																																			
Active	Unlimited Extension	1001	16506463018	Sobby	Manager	9876	sobby@SpecialtyCookies.com	Y	N	Y	Y	null	US/Eastern	810 W MAUDE AVE SUNNYVALE CA 94085-2910																																			
Active	Shared Extension	1005	16506483020	Sharing	FromKichen	9876	sbeckmann@SpecialtyCookies.com	N	N	Y	Y	null	US/Pacific	810 W MAUDE AVE SUNNYVALE CA 94085-2910																																			
Active	Global Extension	1004	16506483006	Shirley	sbeckmann	9876	sbederman@8x8.com	Y	N	Y	Y	null	US/Pacific	810 W MAUDE AVE SUNNYVALE CA 94085-2910																																			
Active	Unlimited Extension	1003	16506462992	Maheeh	Swami	9876	sbederman@8x8.com	Y	N	Y	Y	null	US/Pacific	810 W MAUDE AVE SUNNYVALE CA 94085-2910																																			
Active	Metered Extension	1002	16506462988	Becky	Carmichael	9876	becky.cullen@SpecialtyCookies.com	Y	N	Y	Y	null	US/Pacific	810 W MAUDE AVE SUNNYVALE CA 94085-2910																																			
Active	Virtual Extension	3001	15556487140	Remote	Nader	987	mader@SpecialtyCookies.com	Y	N	N	Y	null	US/Pacific	810 W MAUDE AVE SUNNYVALE CA 94085-2910																																			
Active	Unlimited Extension	1009	15557924996	Accountant	Annie	987	annie@SpecialtyCookies.com	Y	N	N	Y	null	US/Eastern	810 W MAUDE AVE SUNNYVALE CA 94085-2910																																			
Active	Shared Extension	1010	15557983628	Sharing	FromAccounting	987	sbeckmann@SpecialtyCookies.com	N	N	N	Y	null	US/Pacific	810 W MAUDE AVE SUNNYVALE CA 94085-2910																																			

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 Astra phones.

### To set up shared lines:

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

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

**Account Manager** Company Name: Specialty Cookies | Main Number: (510) 962-5321

Welcome, Phillip Liu | Sign Out  
Email: pliu@8x8.com  
Edit My Profile Account: Business

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

Home > Phone System > Shared Lines

**Shared Lines Assignment** Help

Shared Lines allow a maximum of eight extension users to share one extension number to receive incoming calls.

Shared Line Phone Number	Shared Line Extension	Assigned Extensions	Line Key Assignment	Actions
(650) 646-3020	1005	Specialty Cookies (555) 648-0703 Ext 1006	Line 4	Delete Edit
		Phillip Liu (650) 646-3018 Ext 1001	Line 4	Delete
(555) 798-3628	1010	Phillip Liu (650) 646-3018 Ext 1001	Line 3	Delete Edit
		Specialty Cookies (555) 648-0703 Ext 1006	Line 2	Delete

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

**Shared Line Assignments**

Please assign a line key on the extension users phone to access the shared line.

Shared Line Phone Number	Shared Line Extension	Extensions	Line Key Assignment
(650) 646-3020	1005	Diana Jay Smith (555) 648-0703 Ext 1006	Line Number 4
		Lobby Manager (650) 646-3018 Ext 1001	Line Number 4

- 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.

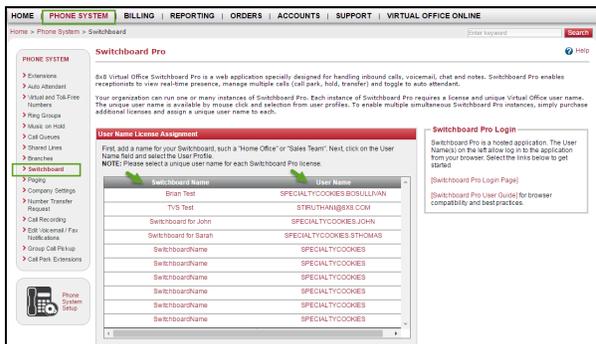
Switchboard Pro is an optional feature that can be purchased separately.

## Configure Switchboard Pro

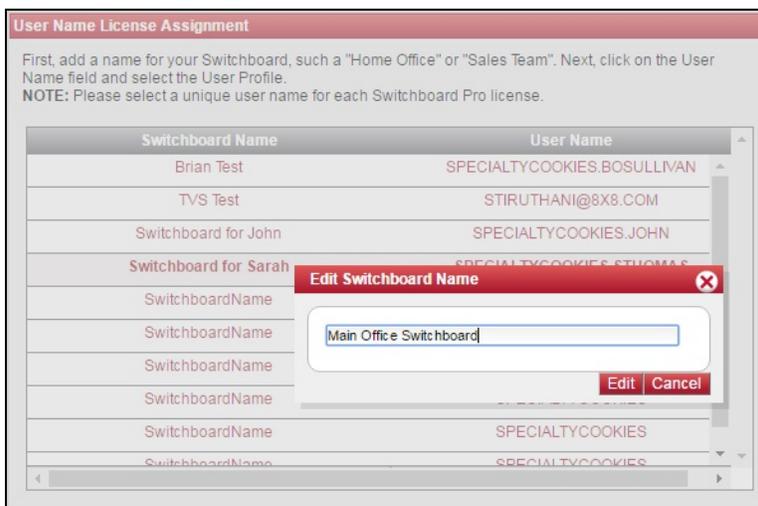
To configure Switchboard Pro, you need to name your switchboard first, and then assign a user profile to it.

### 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.

The screenshot shows a 'Select User Profile' dialog box with a search bar and a table of user profiles. The table has the following columns: Actions, First Name, Last Name, Email Address, and User Name. The data in the table is as follows:

Actions	First Name	Last Name	Email Address	User Name
Select	Sally	Baker	sbeckmann@SpecialtyCookies.com	1010.SPECIALTYCOOKIES
Select	Abbie	Jackson	sgarud@8x8.com	AANNIE
Select	Annie	Thomas	AAnnie@SpecialtyCookies.com	ACCOUNTANNIE
Select	Alan	Marachino	sgarud@8x8.com	AMARACHINO
Select	Angela	York	angela.york@8x8.com	ANGELA.YORK
Select	Angelique	Yu	sgarud@8x8.com	ANGELIQUEY
Select	Al	Soto	asoto@championhomes.com	ASOTO@CHAMPIONHOMES.C
Select	Valerie	Fletcher	valerie.fletcher@8x8.com	BARSINI
Select	Becky	Cullen	sgarud@8x8.com	BCULLEN
Select	Brent	Snyder	sgarud@8x8.com	BECKYC
Select	Brylee	Cullen	sgarud@8x8.com	BRYLEEC
Select	Shirley	Beckmann	sgarud@8x8.com	BSHIRLEY
Select	Chin	Baker	ChinBaker@yahoo.com	CHINESEBAKER
Select	Darren	Hakeman	darren.hakeman@8x8.com	DARREN.HAKEMAN@8X8.COM
Select	Denise	Martin	denise.martin@8x8.com	DENISE.MARTIN@8X8.COM

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**.

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

Home > Phone System > Call Park Extensions

PHONE SYSTEM

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > Call Queues
- > Switchboard
- > Paging
- > Company Settings
- > Number Transfer Request
- > Call Recording
- > Edit Voicemail / Fax Notifications
- > Group Call Pickup
- > Call Park Extensions**

**Call Park Extensions**

Call Park Extensions allow users to park and retrieve calls by pressing a key Busy Lamp Field (BLF) BLF key.

**To start using Park Extensions:**

- Add a Park Extension
- Assign the Park Extension to a BLF Key on the phone

Enter the number of call park extensions you would like to add (4990) extensions left  **Get** **Clear**

First  1-10 of 10  Last Extensions Per Page  All

Extension	Label	Action
<input type="checkbox"/> 195000	<input type="text" value="Paints"/>	Delete
<input type="checkbox"/> 195001	<input type="text" value="Construction"/>	Delete
<input type="checkbox"/> 195002	<input type="text" value="Delivery"/>	Delete

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.

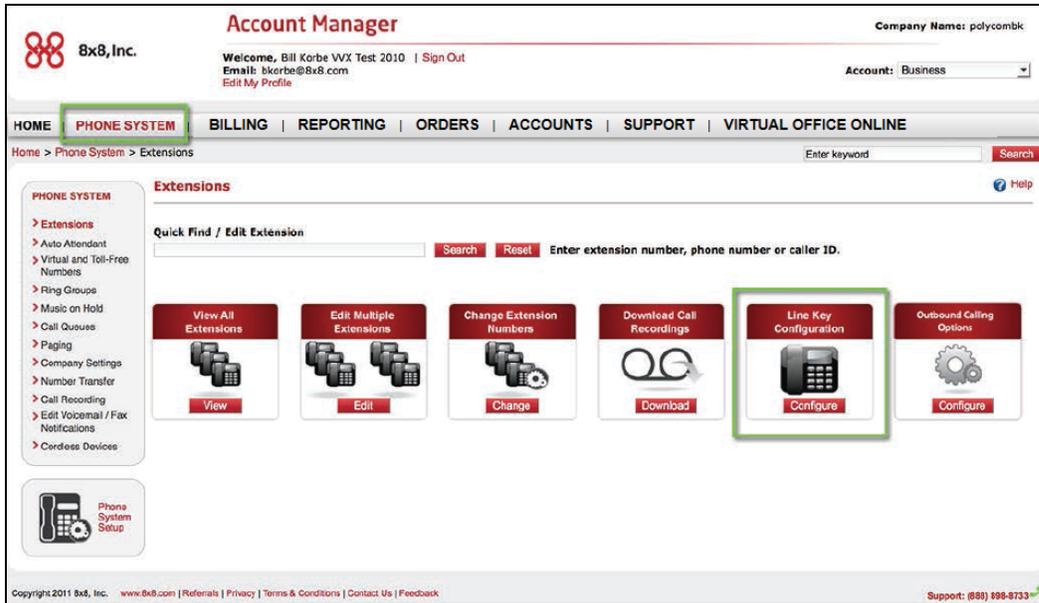
4. Edit the extension names under the **Label** column as needed.

### 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	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.

The screenshot shows the 'Configuration' page in the 8x8 Account Manager. At the top, there are navigation tabs: BILLING | REPORTING | ORDERS | MY ACCOUNT | SUPPORT | VIRTUAL OFFICE ONLINE. Below the navigation is a search bar with the text 'Enter keyword' and a 'Search' button. The main heading is 'Configuration' with a 'Help' icon. A message states: 'The extensions that are eligible for Line Key Configuration through the Account Manager.' Below this is a table with columns: Extension Number, Caller ID First Name, Caller ID Last Name, Device, Reboot Status, Date and Time, and Action. A modal dialog box titled 'Configure Line Keys' is overlaid on the table. The dialog contains the following text: '8x8 has a new Line Key feature to backup each phone's local Contact Directory. Account Manager can now allow centralized line key editing. In order to access the Line Configuration page with the new features, users have to make one update to their local phone Contact Directory on their set to initiate that backup. Please click on the Confirm button if you have already done so. Otherwise, please click on No button and try the centralized line key editing feature again later.' At the bottom of the dialog are 'Confirm' and 'No' buttons.

Extension Number	Caller ID First Name	Caller ID Last Name	Device	Reboot Status	Date and Time	Action
148-2556	BillKorbe 1005	PolycomTest	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:01 PM (PST)	Configure Line Keys
808-5059	BillKorbe 1010	Pilot-Test-550	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:02 PM (PST)	Configure Line Keys
356-1221	VVX 500 Pilot Lab	Bill K Ext 1053	Polycom VVX 500	Rebooted	2012-06-27 03:23 PM (PST)	Configure Line Keys
358-1270	VVX 500 Pilot Lab	Bill K Ext 1054	Polycom VVX 500	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
375-5405	VVX 500 Pilot Lab	Bill K Ext 1055	Polycom VVX 500	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
131-8379	VVX 400	Lab Ext 1057	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
131-8383	Bill Korbe	VVX Test 2010	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
313-3281	VVX 400 Lab	1059	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
123-9076	BK Lab	1060	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
632-5383	BK Lab	1061	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	Configure Line Keys
944-1471	BK Lab	VVX 600 x1066	Polycom VVX 600	Rebooted	2014-04-29 09:44 AM (PST)	Configure Line Keys
945-1290	BK Lab	VVX 600 x1067	Polycom VVX 600	Rebooted	2014-04-28 10:19 AM (PST)	Configure Line Keys

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

#### Back up Contact Directory from Your Phone Device

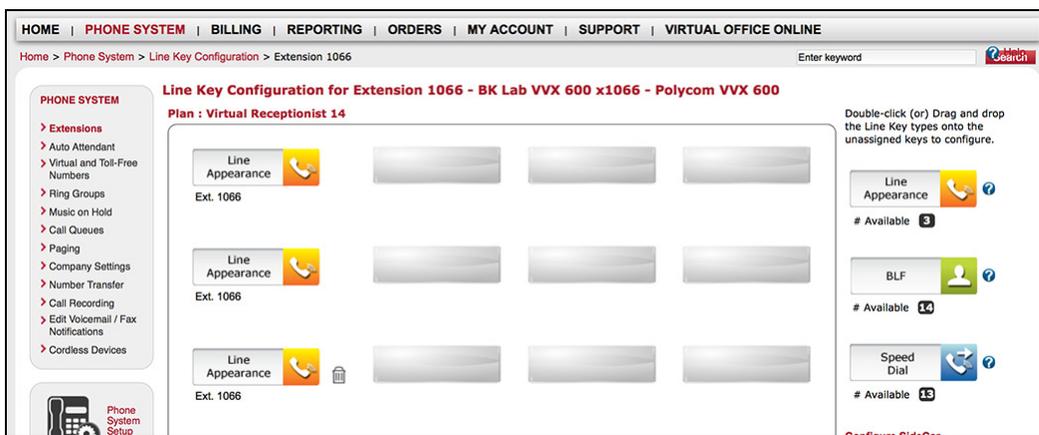
Backing up the Contact Directory on the phone device is essential before editing any keys on Account Manager for the first time. It is done automatically once the backup server launches.

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:

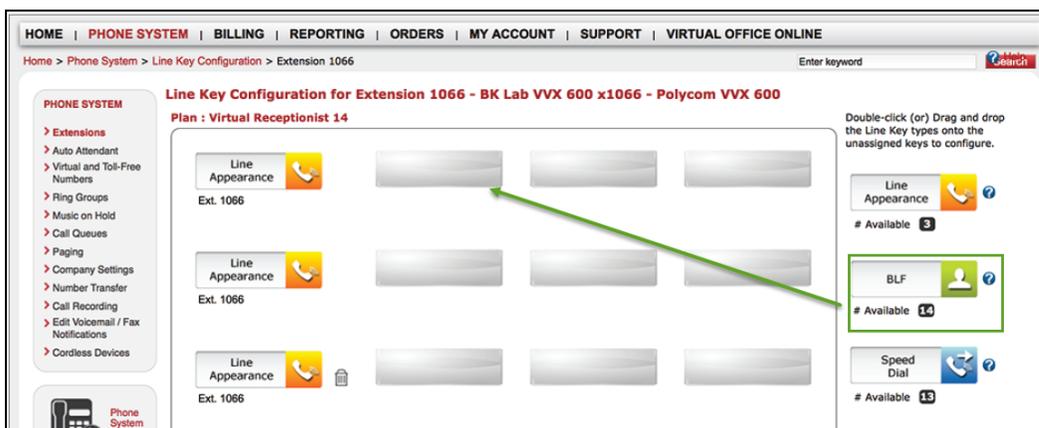
- A. Press  to display the **Home** view on the phone.
- B. From the menu, go to **Directories > Contact Directory**.
- C. Select a contact to edit, or use  to create a new contact.

- D. To edit a contact:
- 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.
  - 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.
- After completing the backup on the phone, click **Confirm** to continue in Account Manager.
  - 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.

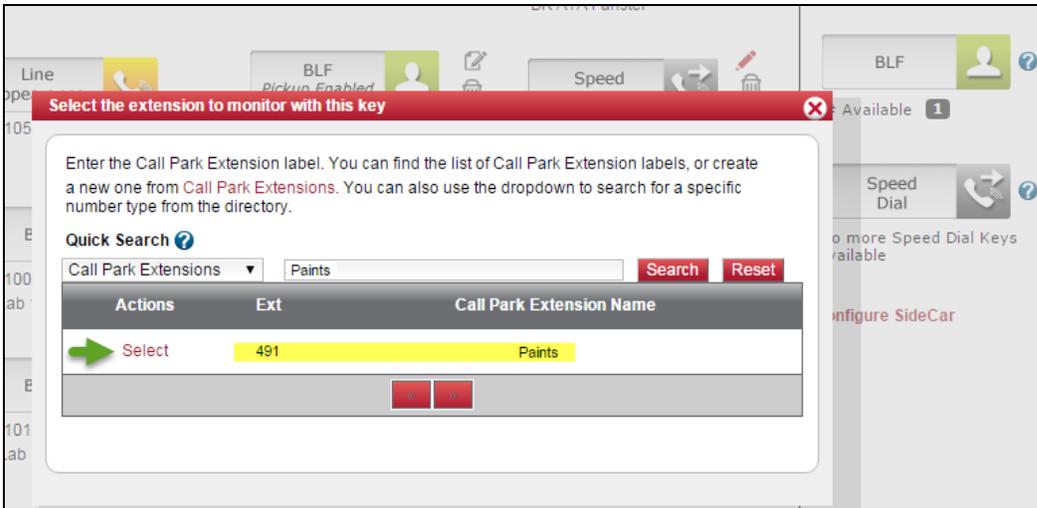
- Drag and drop (or double-click) the BLF key to an unused key in the map. You can also edit an existing line key.



The extension selection prompt appears.



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

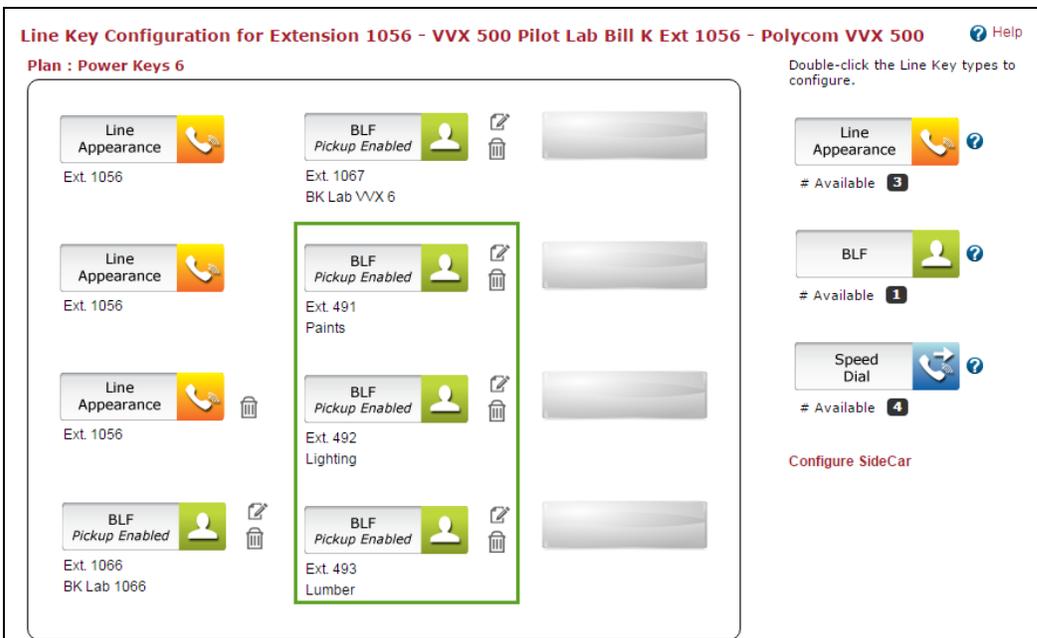


You can also create a label by clicking **Call Park Extensions**.

- 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.

**Line Key Configuration for Extension 1055 - VVX 500 Pilot Lab Bill K Ext 1055 - Polycom VVX 500** [Help](#)

**Plan : Power Keys 6**

Double-click the Line Key types to configure.

Line Appearance Ext. 1055	BLF Pickup Enabled Ext. 1066 BK Lab 1066		
Line Appearance Ext. 1055	BLF Pickup Enabled Ext. 1067 BK Lab 1067		
BLF Ext. 1002 BL Lab 1002	<b>BLF Pickup Enabled Ext. 491 Paints</b>		
BLF Ext. 1010 BK Lab 1010			

**Line Appearance** [?](#)  
# Available **4**

**BLF** [?](#)  
# Available **1**

**Speed Dial** [?](#)  
No more Speed Dial Keys available

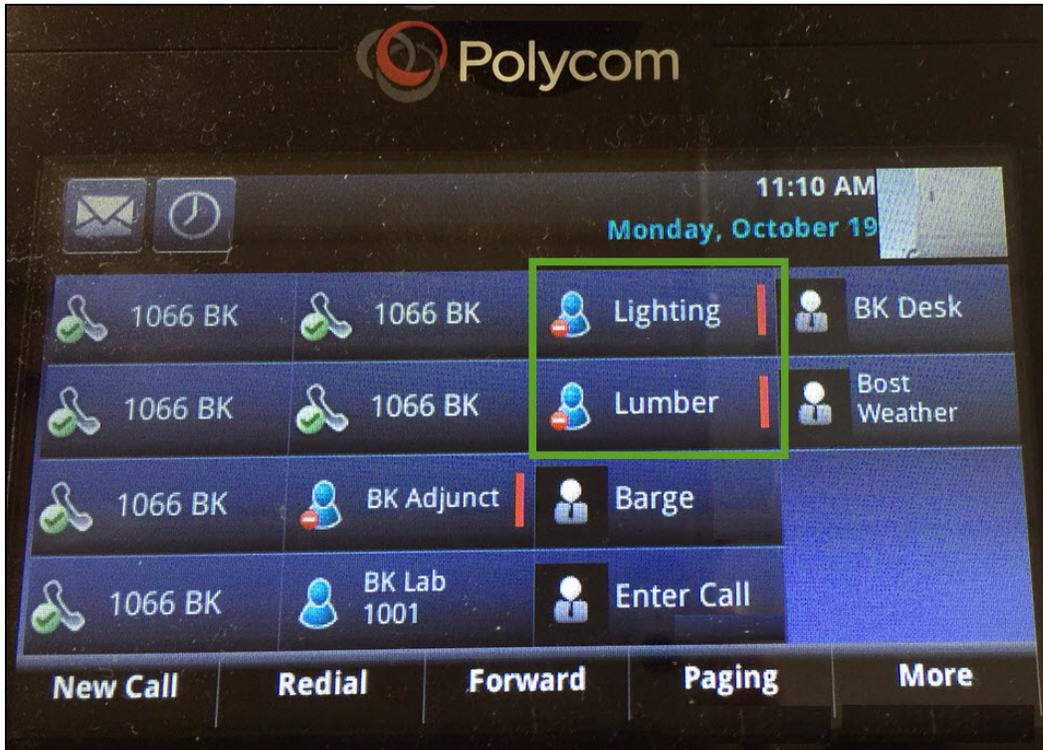
[Configure SideCar](#)

### 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:**

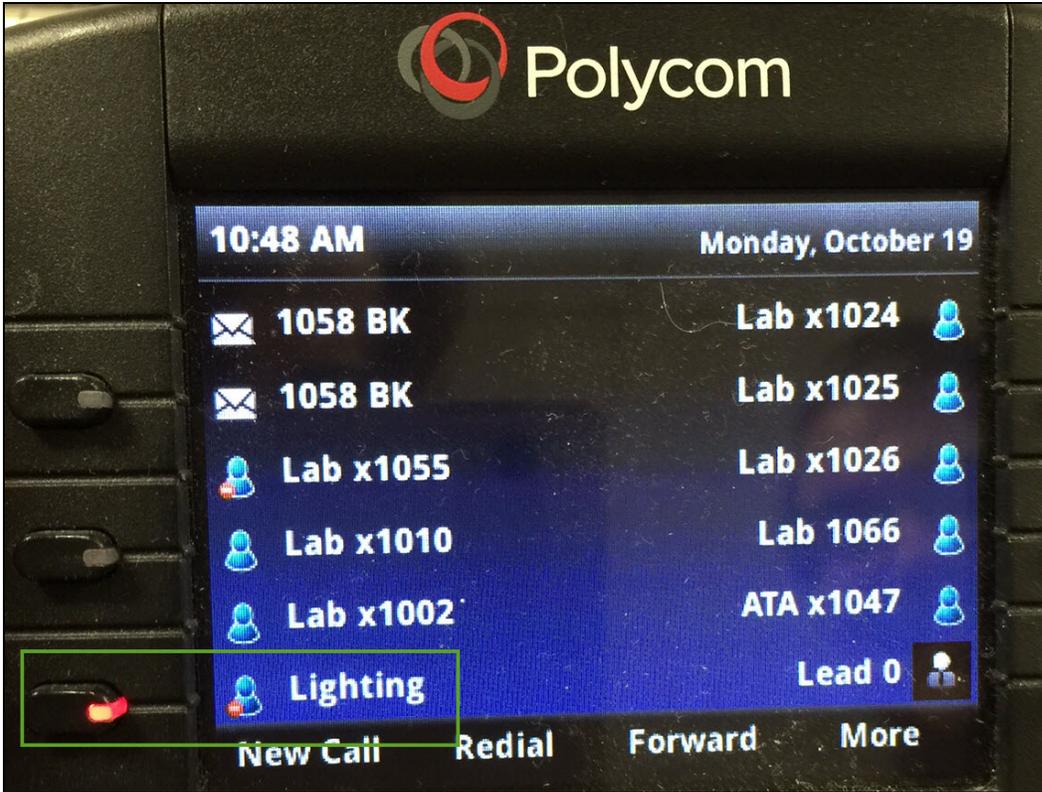
1. Receive an inbound call using the phone for front desk associate.
2. If the call is for Lighting, press the BLF key for the Lighting department.



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

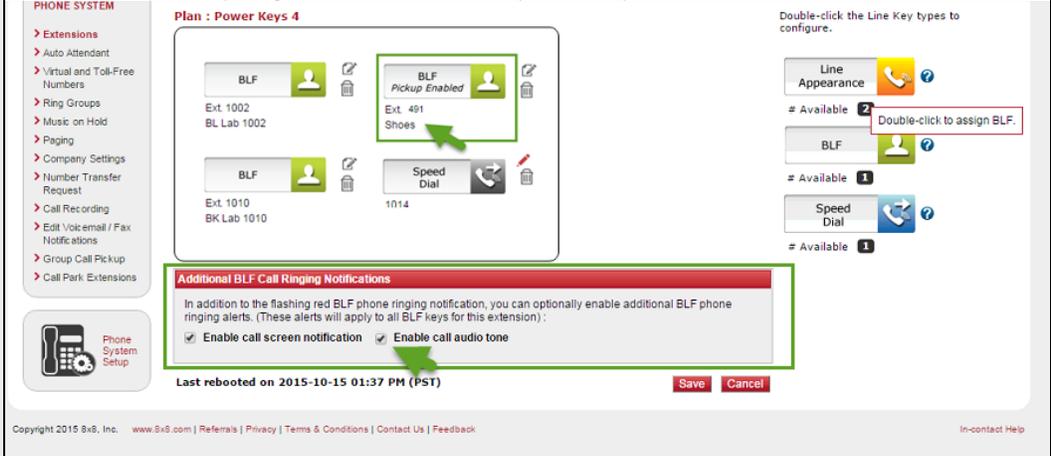
3. Use an intercom call or paging to announce the waiting call.

- 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.



**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > Paging
- > Company Settings
- > Number Transfer Request
- > Call Recording
- > Edit Voicemail / Fax Notifications
- > Group Call Pickup
- > Call Park Extensions

**Plan : Power Keys 4**

Ext. 1002  
BL Lab 1002

Ext. 1010  
BK Lab 1010

Ext. 491  
Shoes

Speed Dial  
1014

**Additional BLF Call Ringing Notifications**

In addition to the flashing red BLF phone ringing notification, you can optionally enable additional BLF phone ringing alerts. (These alerts will apply to all BLF keys for this extension):

Enable call screen notification  Enable call audio tone

Last rebooted on 2015-10-15 01:37 PM (PST)

Save Cancel

Double-click the Line Key types to configure.

Line Appearance  
# Available 2 Double-click to assign BLF.

BLF  
# Available 1

Speed Dial  
# Available 1

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-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**.

**Account Manager** Company Name: Specialty Cookies | Main Number: (510) 962-5321

Welcome, Sarah Thomas | Sign Out  
Email: pliu@8x8.com  
Edit My Profile

Account: Business

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

Home > Phone System > Group Call Pickups

Enter keyword Search

**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > Call Queues
- > Shared Lines
- > Branches
- > Switchoverboard
- > Paging
- > Company Settings
- > Number Transfer Request
- > Call Recording
- > Edit Voice mail / Fax Notifications
- > Group Call Pickup**
- > Call Park Extensions

**Group Call Pickups**

Group Call Pickup allows users to answer calls that come in on a number other than their own. The call can be answered by dialing \*66+Group Call Pickup Extension number.

[Create Group Call Pickup](#)

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

**Create Group Call Pickup** Help

Please enter your new Group Call Pickup information below.

**Manage List(s)**

Create, View, Edit, Delete, List(s): [Manage List\(s\)](#)

**Group Call Pickup Details**

Group Call Pickup Name

Group Call Pickup Extension  [Suggest](#)

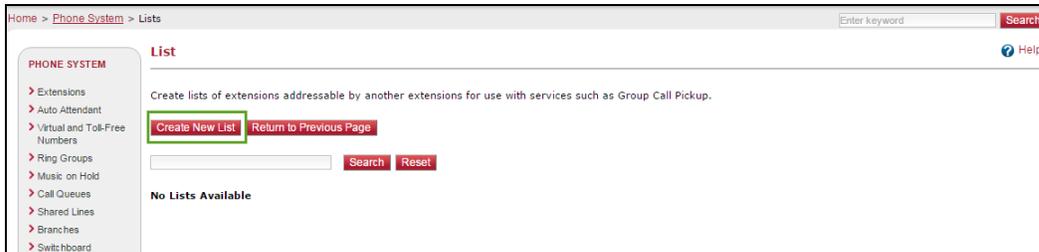
**Members of Group Call Pickup**

Create a new group by picking a list

Use the [+](#) and [-](#) buttons to Add/Delete an existing list to this Group Call Pickup

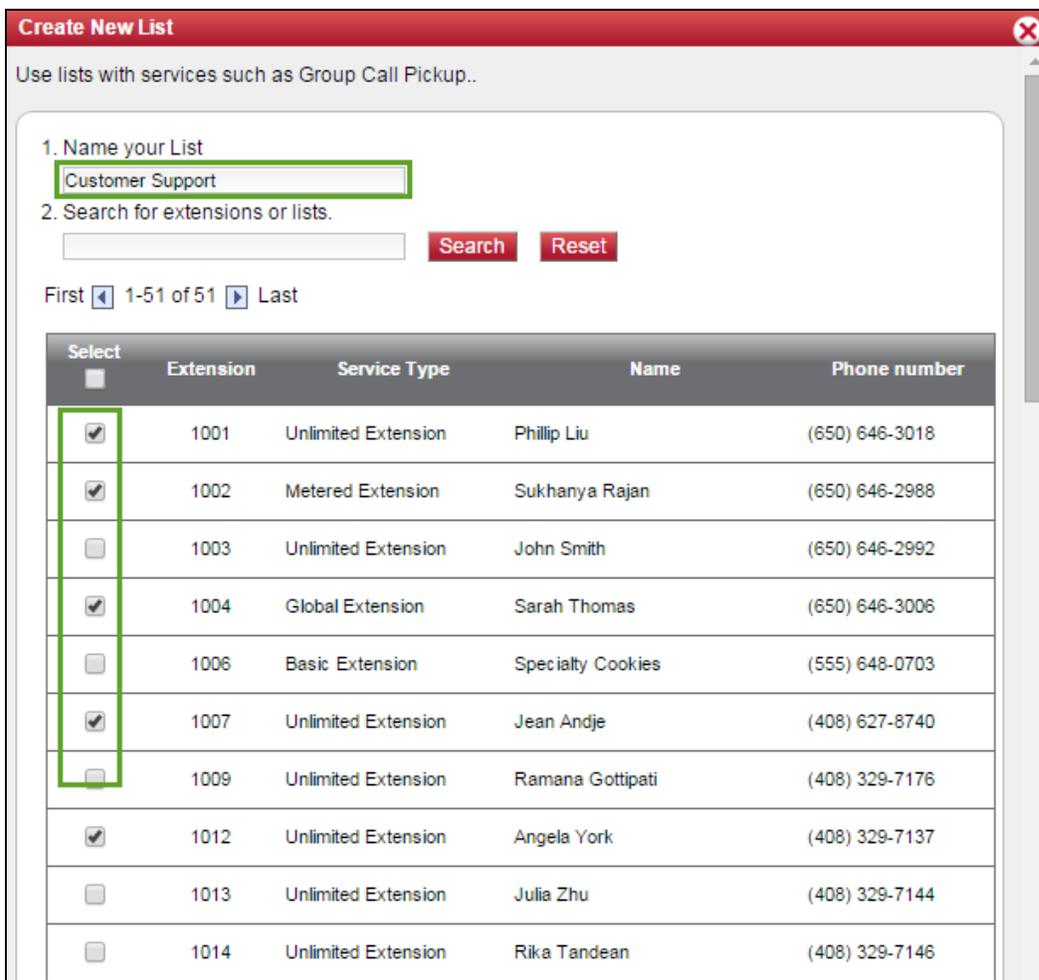
Group Call Pickup List [Add/ Delete](#)

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

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.

**List**

---

Create lists of extensions addressable by another extensions for use with services such as Group Call Pickup.

[Create New List](#) [Return to Previous Page](#)

[Search](#) [Reset](#)

First [◀](#) 1-1 of 1 [▶](#) Last

List Name	Used By	Actions
Customer Support List		<a href="#">View/Edit</a>   <a href="#">Copy</a>   <a href="#">Delete</a>



## 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.

**Create Group Call Pickup** Help

Please enter your new Group Call Pickup information below.

**Manage List(s)**  
Create, View, Edit, Delete, List(s): [Manage List\(s\)](#)

**Group Call Pickup Details**

Group Call Pickup Name:

Group Call Pickup Extension:  [Suggest](#)

**Members of Group Call Pickup**

Create a new group by picking a list

Use the and buttons to Add/Delete an existing list to this Group Call Pickup

Group Call Pickup List	Add/ Delete
<input type="text" value="Customer Support List"/>	

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

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.

**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > Call Queues
- > Shared Lines
- > Branches
- > Switchboard
- > Paging
- > Company Settings
- > Number Transfer Request
- > Call Recording
- > Edit Voicemail / Fax Notifications
- > Group Call Pickup**

**Group Call Pickups** Help

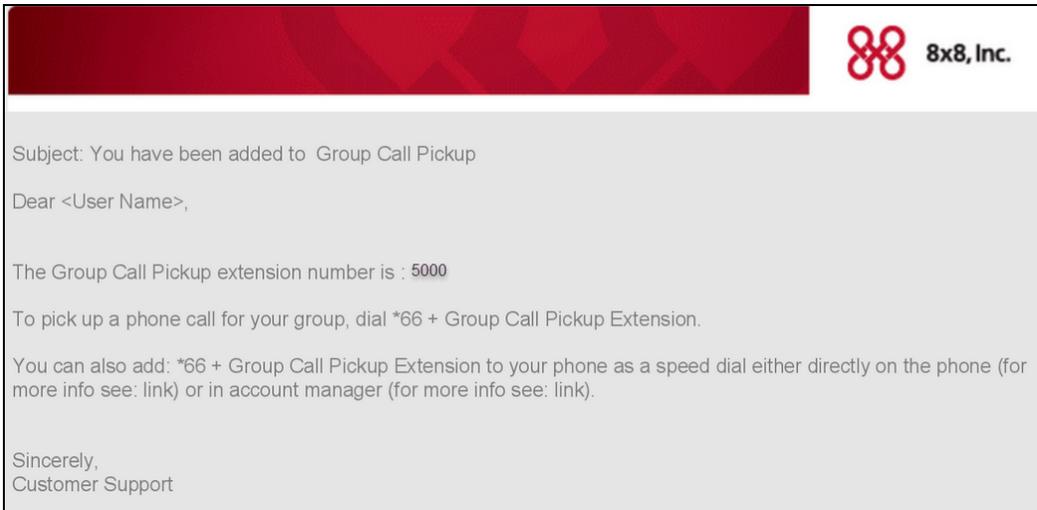
Group Call Pickup allows users to answer calls that come in on a number other than their own. The call can be answered by dialing \*66+Group Call Pickup Extension number.

[Create Group Call Pickup](#) | [Delete All Group Call Pickups](#)

Group Call Pickups	Group Extension	Group Members	Action
Customer Support Group	5000	Customer Support List	<a href="#">Edit</a> <a href="#">Delete</a>

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.



### 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**.

The screenshot shows the 8x8 Account Manager interface. The top navigation bar includes 'HOME', 'PHONE SYSTEM', 'BILLING', 'REPORTING', 'ORDERS', 'ACCOUNTS', 'SUPPORT', and 'VIRTUAL OFFICE ONLINE'. The 'PHONE SYSTEM' tab is selected. Below the navigation bar, there is a search bar and a 'Help' icon. The main content area is titled 'Extensions' and contains a 'Quick Find / Edit Extension' search bar. Below the search bar, there are six action buttons: 'View All Extensions', 'Edit Multiple Extensions', 'Change Extension Numbers', 'Download Call Recordings', 'Line Key Configuration', and 'Outbound Calling Options'. The 'Line Key Configuration' button is highlighted with a green box. Below the buttons, there is a 'Phone System Status' icon.

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	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.

The screenshot shows the 'Configuration' page in the 8x8 Account Manager. At the top, there are navigation tabs: BILLING | REPORTING | ORDERS | MY ACCOUNT | SUPPORT | VIRTUAL OFFICE ONLINE. Below the navigation is a search bar with the text 'Enter keyword' and a 'Search' button. The main heading is 'Configuration' with a 'Help' icon. A message states: 'The extensions that are eligible for Line Key Configuration through the Account Manager.' Below this is a table with columns: Line Number, Caller ID First Name, Caller ID Last Name, Device, Reboot Status, Date and Time, and Action. A modal dialog box titled 'Configure Line Keys' is overlaid on the table. The dialog contains the following text: '8x8 has a new Line Key feature to backup each phone's local Contact Directory. Account Manager can now allow centralized line key editing. In order to access the Line Configuration page with the new features, users have to make one update to their local phone Contact Directory on their set to initiate that backup. Please click on the Confirm button if you have already done so. Otherwise, please click on No button and try the centralized line key editing feature again later.' At the bottom of the dialog are 'Confirm' and 'No' buttons.

Line Number	Caller ID First Name	Caller ID Last Name	Device	Reboot Status	Date and Time	Action
148-2556	BillKorbe 1005	PolycomTest	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:01 PM (PST)	<a href="#">Configure Line Keys</a>
808-5059	BillKorbe 1010	Pilot-Test-550	Polycom SoundPoint IP 550	Rebooted	2013-03-22 03:02 PM (PST)	<a href="#">Configure Line Keys</a>
356-1221	VVX 500 Pilot Lab	Bill K Ext 1053	Polycom VVX 500	Rebooted	2012-06-27 03:23 PM (PST)	<a href="#">Configure Line Keys</a>
358-1270	VVX 500 Pilot Lab	Bill K Ext 1054	Polycom VVX 500	Rebooted	2012-06-27 03:25 PM (PST)	<a href="#">Configure Line Keys</a>
375-5405	VVX 500 Pilot Lab	Bill K Ext 1055	Polycom VVX 500	Rebooted	2012-06-27 03:25 PM (PST)	<a href="#">Configure Line Keys</a>
131-8379	VVX 400	Lab Ext 1057	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	<a href="#">Configure Line Keys</a>
131-8383	Bill Korbe	VVX Test 2010	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	<a href="#">Configure Line Keys</a>
313-3281	VVX 400 Lab	1059	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	<a href="#">Configure Line Keys</a>
123-9076	BK Lab	1060	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	<a href="#">Configure Line Keys</a>
632-5383	BK Lab	1061	Polycom VVX 400	Rebooted	2012-06-27 03:25 PM (PST)	<a href="#">Configure Line Keys</a>
944-1471	BK Lab	VVX 600 x1066	Polycom VVX 600	Rebooted	2014-04-29 09:44 AM (PST)	<a href="#">Configure Line Keys</a>
945-1290	BK Lab	VVX 600 x1067	Polycom VVX 600	Rebooted	2014-04-28 10:19 AM (PST)	<a href="#">Configure Line Keys</a>

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

#### Back up Contact Directory from Your Phone Device

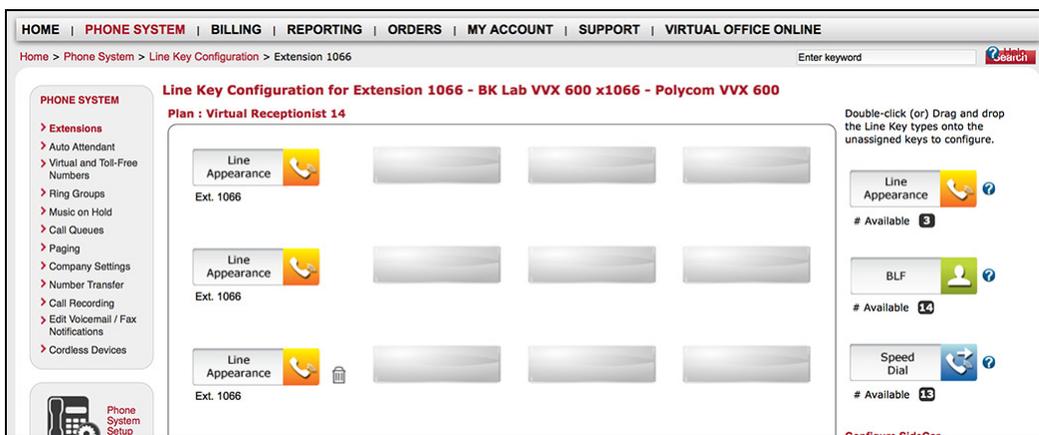
Backing up the Contact Directory on the phone device is essential before editing any keys on Account Manager for the first time. It is done automatically once the backup server launches.

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:
- 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.
  - 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.
- After completing the backup on the phone, click **Confirm** to continue in Account Manager.
  - 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.

- 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.

- 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**.

Line Key Configuration for Extension 10005 - Divina V - Polycom SoundPoint IP 550

Plan : Power Keys 4

Select the extension to monitor with this key

To select an extension, type the extension number, caller ID or phone number and hit the search button. You can also use the dropdown to search for a specific number type from the directory.

Quick Search

Extensions

Extensions

Group Call Pickup

Additional BLF Call Ringing Notifications

In addition to the flashing red BLF phone ringing notification, you can optionally enable additional BLF phone ringing alerts. (These alerts will apply to all BLF keys for this extension):

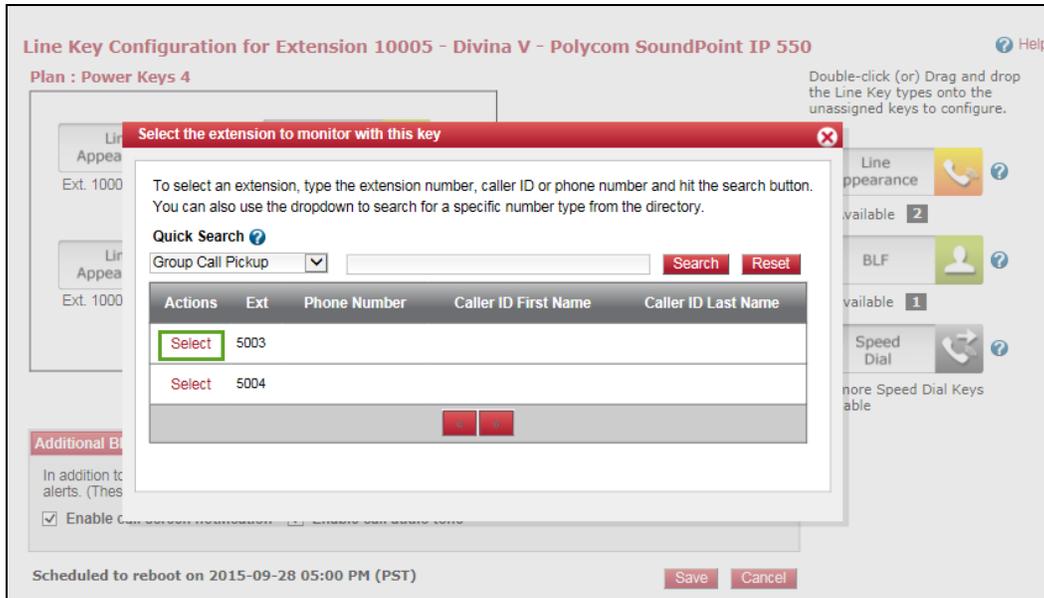
Enable call screen notification  Enable call audio tone

Scheduled to reboot on 2015-09-28 05:00 PM (PST)

Save Cancel

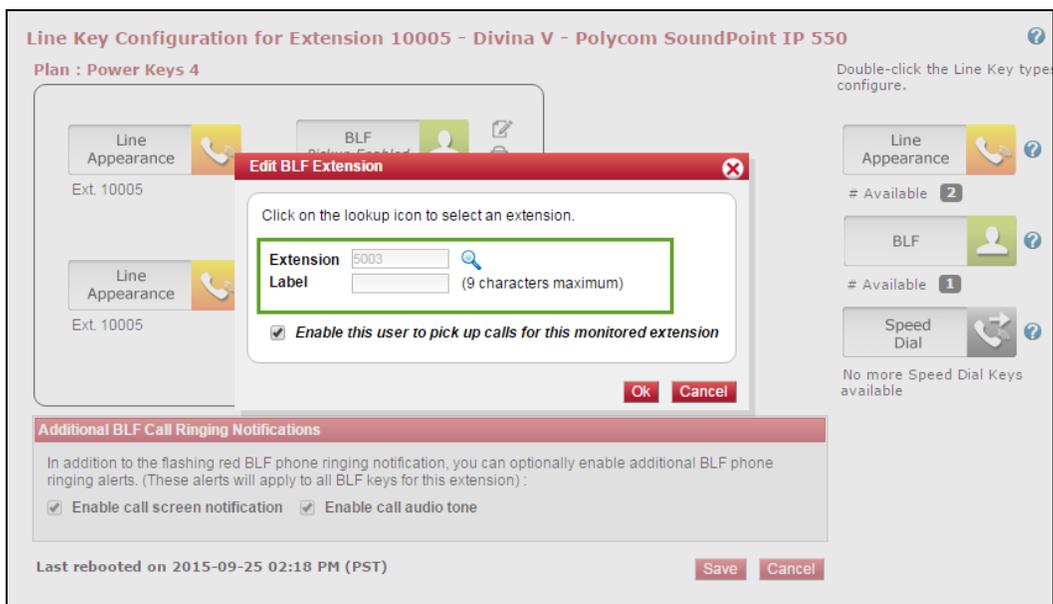
- c. Click **Search**.

- 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

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

Select the number for this speed dial key

Enter extension, or type the phone number or caller ID and click Search.  
Use the dropdown to search the directory for a specific number type.  
(Search is optional, for Internal extensions only)

Quick Search ?

Group Call Pickup  Search Reset

Actions	Ext	Phone Number	Caller ID First Name	Caller ID Last Name
Select	5003			
Select	5004			

Contact Phone Number

First Name

Last Name

Label  (9 characters maximum)

Ring Type

Auto Divert

Divert Contact To

Auto Reject

Save Cancel

- 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**.

**PHONE SYSTEM**

- > Extensions
- > Auto Attendant
- > Virtual and Toll-Free Numbers
- > Ring Groups
- > Music on Hold
- > Call Queues
- > Switchboard
- > Paging
- > Company Settings
- > Number Transfer Request
- > Call Recording
- > Edit Voice-mail / Fax Notifications
- > Cordless Devices



Phone System Setup

#### Manage Extensions Help

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 Extensions**.

[Edit Multiple Extensions](#) | 
 [Change Extension Number](#) | 
 [Download Call Recordings](#) | 
 [Download Extensions \(csv\)](#) | 
 [Download Activation Codes](#)

Actions	Status	Service Type	Ext	Phone Number	Caller ID First Name	Caller ID Last Name	Devices	Voice-mail-to-Email Address
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Unlimited Extension	1059	(559) 313-3281	VVX 400 Lab	1059	Polycom VVX 400	bkorbe@8x8.com
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Unlimited Extension Pro	1060	(408) 123-9076	BK Lab	1060	Polycom VVX 310	bkorbe@8x8.com
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Unlimited Extension Pro	1061	(408) 532-5383	BK Lab	1061	Polycom VVX 300	bkorbe@8x8.com
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Unlimited Extension Pro	1066	(559) 944-1471	BK Lab	VVX 600 x1066	Polycom VVX 600	bkorbe@8x8.com
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Unlimited Extension Pro	1067	(559) 945-1290	BillKorbe 1002	PolycomTest 1	Polycom VVX 600	bkorbe@8x8.com
<a href="#">Edit</a> <a href="#">(Activate Device)</a>	Pending	Unlimited Extension	1068	(558) 445-5325	Unassigned	Unassigned	Polycom VVX 400	bkorbe@8x8.com
<a href="#">Edit</a> <a href="#">(Activate Device)</a>	Pending	Unlimited Extension	1069	(558) 446-3476	Mardi Jackson		Polycom VVX 600	mardij@yahoo.com
<a href="#">Edit</a> <a href="#">(Activate Device)</a>	Pending	Unlimited Extension	1070	(210) 500-0633	Mardi Jackson		Polycom VVX 300	mardij@yahoo.com
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Unlimited Extension	1071	(210) 500-0634	Mardi Jackson		Polycom VVX 400	mardij@yahoo.com
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Unlimited Extension	1072	(210) 500-0635	Agent	Barge	Polycom VVX 300	bkorbe@8x8.com
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Unlimited Extension Pro	1073	(408) 550-4550	Darryl Addington		Polycom SoundPoint IP 335	darryl.addington@8x8.com
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Unlimited Extension Pro	1074	(408) 550-4551	Darryl Addington		Polycom SoundPoint IP 335	darryl.addington@8x8.com
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Unlimited Extension Pro	1075	(408) 550-4552	Darryl Addington		Polycom SoundPoint IP 335	darryl.addington@8x8.com
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Hot Desk Extension	1076	(210) 550-3866	Host	Hot Desk	Polycom SoundPoint IP 550	mardijackson@8x8.com
<a href="#">Edit</a> <a href="#">(Replace Device)</a>	Active	Hot Desk Extension	1077	(210) 550-3870	Hot Desk	Demo	Polycom SoundPoint IP 550	bkorbe@8x8.com
<a href="#">Edit</a> <a href="#">(Activate Device)</a>	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.

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

**8x8, Inc.** Account Manager Company Name: polycombk

Welcome, Nalini Ananthamurthy | Sign Out  
Email: nalini.ananthamurthy@8x8.com  
[Edit My Profile](#) Account: Business

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

Home > Phone System > Manage Extensions > Edit Extension Enter keyword

### Edit Extension Help

#### Extension Information

<b>External Caller ID:</b>	
First Name	Hot Desk
Last Name	Demo
Phone Number	(210) 550-3870
Extension	1077
Plan	Hot Desk Extension
Equipment	Polycom SoundPoint IP 550

#### Extension Settings

Time Zone	US/Pacific
Preferred Codec	G.729A (30 kbps)
Emergency Service Address	2125 ONEL DR, SAN JOSE, CA 95131-2032 <input type="button" value="Edit"/>

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:

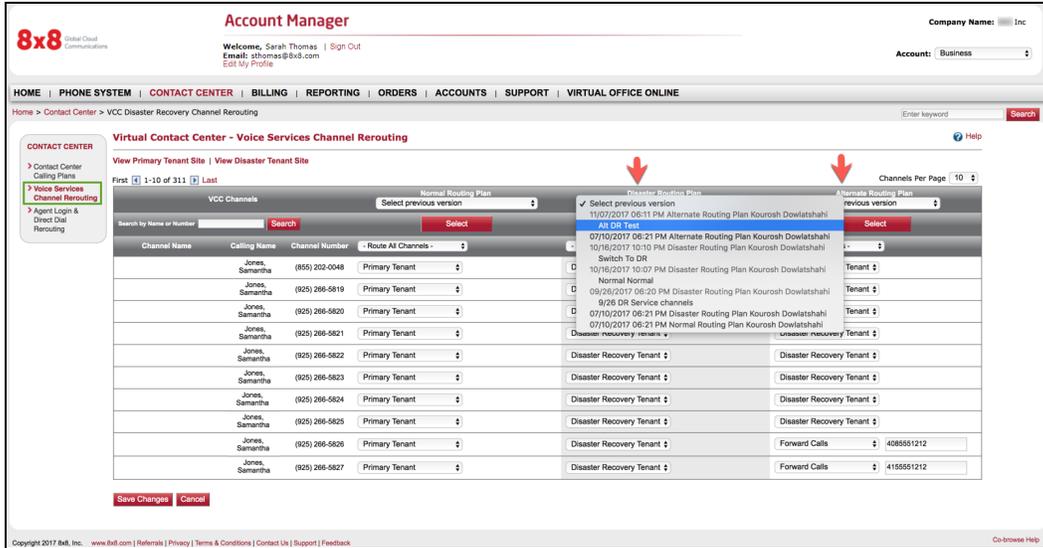
## Step 1: Create an Alternate Routing Plan

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.

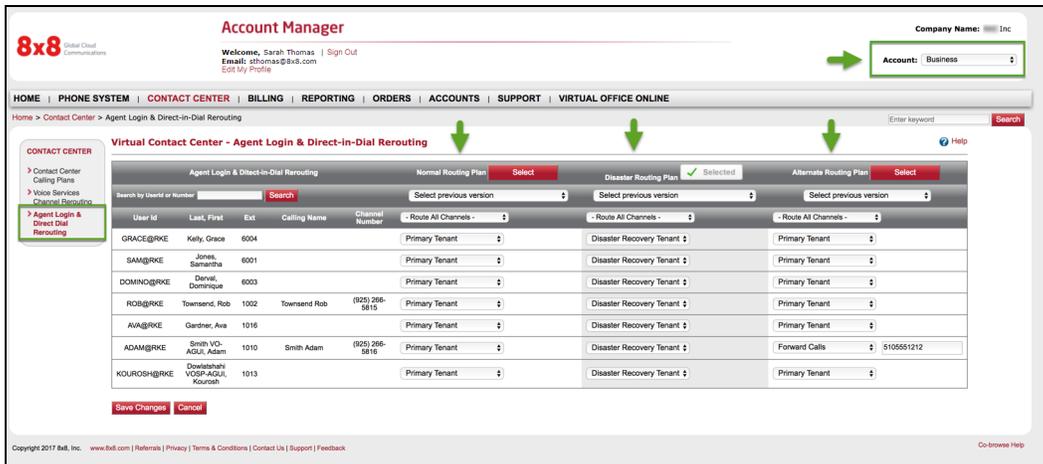
The screenshot displays the 8x8 Account Manager dashboard. At the top left is the 8x8 logo and the text "8x8, Inc.". To the right, it says "Welcome, Sarah Thomas | Sign Out" and "Email: sthomas@8x8.com | Edit My Profile". Further right, there are dropdown menus for "Account: Business" and "Phone System Name: gatestrane1". Below this is a navigation bar with links: HOME | PHONE SYSTEM | CONTACT CENTER | BILLING | REPORTING | ORDERS | MY ACCOUNT | SUPPORT | VIRTUAL OFFICE ONLINE. The "CONTACT CENTER" link is circled in green. To the right of the navigation bar is a search box labeled "Enter keyword" with a "Search" button. The main content area is divided into several sections: "Call Log Summary" with a "Select Time Frame" dropdown and a "View Call Logs" button; "Billing Summary" showing "Status: Current", "Payment Amount: \$0.00", and "Next Payment Due: 07-02-2013", with buttons for "View Statements" and "Update Billing Profile"; "Phone System Setup" with buttons for "Setup Features", "View User Profiles", "View Privileges", "Installation Appointment(s)", and "Download Activation Codes"; and "Corporate Directory" with a search box and a list of contacts, including "Rupali Rane" with phone number "1.5561.061-6615 (Ext: 1001)" and a "Chat" button. At the bottom, there is an "Account Updates" section with "Order Status | View All" and "CO100004902 - Pending ACD Request", and an "8x8 Network Alerts | Support" section stating "All systems and networks are currently functioning at 100%".

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.

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

**Virtual Contact Center Channel Rerouting**

VCC Channels		Normal Routing Plan	
Search by Name or Number <input type="text"/>		Select previous version <input type="text"/>	
<input type="button" value="Search"/>		<input type="button" value="Select"/>	
Channel Name	Channel Number		
	(101) 131-6248	- Route All Channels -	
	(101) 131-6249	Primary Tenant	
	(866) 950-6806	Disaster Recovery Tenant	
		Forward Calls	
		Primary Tenant	

- Click **Save Changes**. You are prompted to save with comments.
- 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.



The screenshot shows a configuration window for an 'Alternate Routing Plan'. The title bar reads 'Alternate Routing Plan'. Below the title bar, there is a dropdown menu with the text 'Forward to Disaster Recovery Ter'. A red button labeled 'Select' is highlighted with a green oval. Below the 'Select' button is another dropdown menu with the text '- Route All Channels -'. At the bottom of the window, there are four rows, each containing a dropdown menu with the text 'Disaster Recovery Tenant'.

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.

The screenshot shows the 'Account Manager' interface for '8x8 Global Cloud Communications'. The user is logged in as 'Sarah Thomas'. The navigation menu includes 'HOME', 'PHONE SYSTEM', 'CONTACT CENTER', 'BILLING', 'REPORTING', 'ORDERS', 'ACCOUNTS', 'SUPPORT', and 'VIRTUAL OFFICE ONLINE'. The current page is 'Virtual Contact Center - Voice Services Channel Rerouting'. A table lists 'VCC Channels' with columns for 'Channel Name', 'Calling Name', 'Channel Number', and 'Route All Channels'. A dropdown menu is open, showing a list of 'Normal Routing Plan' versions. Red arrows point to the 'Select previous version' dropdown and the 'Save Changes' button.

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.

**Channels » Email » Properties**

POC@ corp.com

◀ Back to channel list

**Properties**

**Configuration**

Channel type: Email

\* Channel Name: POC Test

\* Incoming Email Address: POC@ corp.com

\* User ID: POC@ corp.com

\* Password: \*\*\*\*\*

\* Retype Password: \*\*\*\*\*

\* Incoming Mail Server: Outlook.office365.com

Protocol: POP3 over SSL \* Port: 995

\* Email Script: POC Test

This channel is enabled

\* Uses Existing User Profile credentials from Primary Email tenant Channel

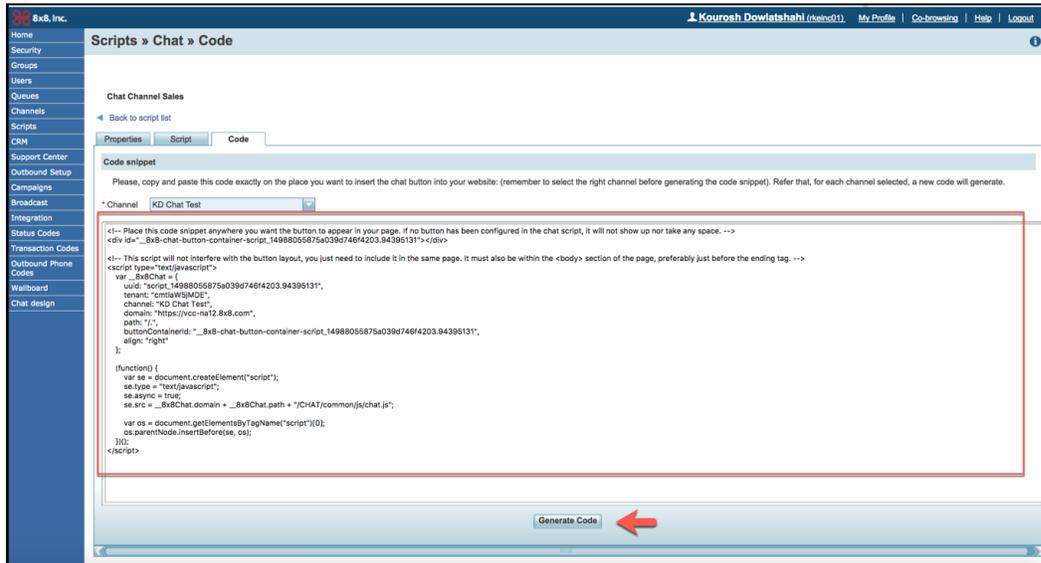
Check this field to Enable Email Channel on DR Tenant

**Test**

Once done entering the connection parameters to the mail server in the form below, you should test the connection with the mail server by clicking on the 'Test' button below.

Test Save Cancel

- **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.



The screenshot shows the 8x8 Account Manager interface. The left sidebar contains navigation options like Home, Security, Groups, Users, Queues, Channels, Scripts, CRM, Support Center, Outbound Setup, Campaigns, Broadcast, Integration, Status Codes, Transaction Codes, Outbound Phone Codes, Wallboard, and Chat design. The main content area is titled 'Scripts » Chat » Code' and shows the 'Code snippet' section. A dropdown menu is set to 'KD Chat Test'. Below it, there is a code snippet for embedding a chat button. A red arrow points to the 'Generate Code' button at the bottom of the code snippet area.

**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.

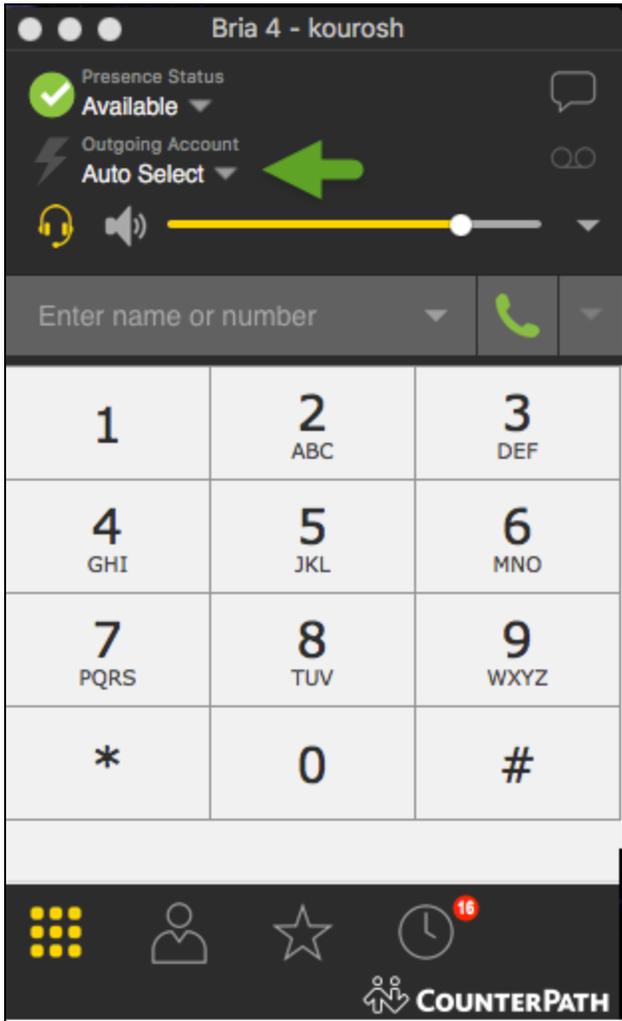


If you use 8x8 carrier services, quickly redirect your inbound voice traffic by using the Channel Rerouting tool in the 8x8 online Account Manager.

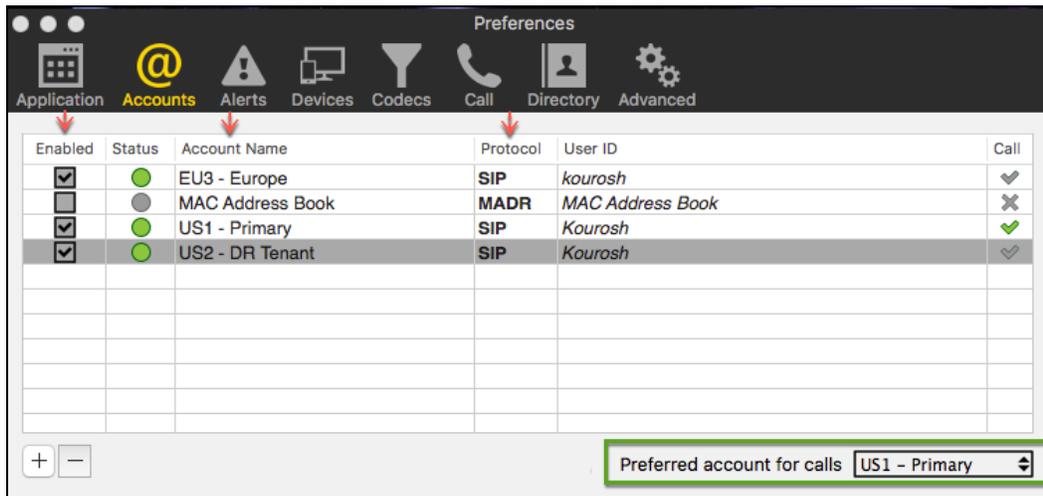
If you do not use 8x8 as your carrier, we work with you during your DR planning to identify the steps your carrier requires for manually redirecting your calls.

## 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.

Sip Account - Ready

Account name:

Use for:  Call  
 IM/Presence

**General** Voicemail Topology Transport Advanced

User Details

\* User ID

\* Domain

Password

Display name

Authorization name

Domain Proxy

Register with domain and receive calls

Send outbound via:

Domain  Proxy Address

Dial plan

Cancel OK

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.

The screenshot shows the 8x8 Account Manager interface for SMB users. At the top, the 8x8 logo and '8x8, Inc.' are on the left, and 'Company Name: Specialty Cookies | Main Number: (510) 962-5321' is on the right. Below this is a user welcome message for Phillip Liu. The navigation bar includes 'HOME | PHONE SYSTEM | BILLING | REPORTING | ORDERS | ACCOUNTS | SUPPORT | VIRTUAL OFFICE ONLINE', with 'BILLING' highlighted. A search bar is present on the right. The main content area is titled 'Billing - Consolidated' and features a sidebar with 'BILLING' options: 'Statements', 'Billing Profile', and 'Billing Profile'. The central area contains three main action buttons: 'Update Payment / Billing Info' (with an 'Update' button), 'View Statements' (with a 'View' button), and 'Download All Accounts' (with a 'Download' button). To the right is an 'Activity Since Last Payment' section with a currency dropdown set to '\$ US Dollar' and a note: 'View activity since your last payment. Next payment will be processed 03-02-2017'.

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

The screenshot shows the 8x8 Account Manager interface for Enterprise users. The layout is similar to the SMB version but includes additional options. The navigation bar and search bar are the same. The sidebar now includes 'Billing Preferences' and 'Cost Centers'. The central area features five main action buttons: 'Update Payment / Billing Info' (with an 'Update' button), 'View Statements' (with a 'View' button), 'Download All Accounts' (with a 'Download' button), 'Billing Preferences' (with a 'View' button), and 'Cost Centers' (with a 'View' button). The 'Activity Since Last Payment' section remains the same, with the currency dropdown set to '\$ US Dollar'.

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.

Home > Billing > Statements

**BILLING**

- Statements
- Billing Profile

**Important Message**

We have been unable to successfully process your payment. The past due amount is \$301.39. Please pay your bill by using the "Pay Now" button below to avoid any potential service disruption. [Pay Now](#)

**Statements**

Below are your statements for the past 18 months.  
[View Payment History](#)

Statement Date	Amount	Status	Consolidated	Actions
03-01-2015	\$301.39	Past Due	Yes	<a href="#">View</a>

**Activity Since Last Payment**

Currency: \$ US Dollar

View activity since your last payment.  
 Next payment will be processed 03-02-2017

- The following is a statement for multiple bills.

8x8, Inc. Account Manager

Welcome, Nishant Jha | Sign Out  
 Email: nishant.jha@8x8.com  
 Edit My Profile

Company Name: qatstnshant  
 Account: Business

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

Home > Billing > Statements

**BILLING**

- Statements
- Billing Profile
- Billing Preferences
- Cost Centers

**Statements**

Below are your statements for the past 18 months.  
[View Payment History](#)

Statement Date	Cost Center	Amount	Status	Consolidated	Actions
08-01-2015		\$316.60	Past Due	Yes	
	miami	\$126.64	Past Due	Yes	<a href="#">View</a>
	new york	\$189.96	Past Due	Yes	<a href="#">View</a>

[Expand to show other cost centers for this date](#)

**Activity Since Last Payment**

Cost Center	Next Payment Date	Actions
Corporate Cost Center	10-02-2015	<a href="#">View</a>
miami	10-02-2015	<a href="#">View</a>
new york	10-02-2015	<a href="#">View</a>

**Introducing A New Statement Format!**

View Monthly Statement

- 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

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

qanash  
c/o Jha Nishant

Billing Address  
2125 One! Dr  
San Jose  
CA USA 95131

**Bill at a Glance**

Summary		Payment Information	
Due Date	08-02-2015	Date Billed:	N/A
Previous Balance <sup>1</sup>	\$ 0.00	Payment Type:	ACH Billing
Monthly Charges	\$ 474.89	Bank Information:	
Adjustments	\$ 0.00	Bank Routing Number:	null
Payments since last bill	\$ 0.00	Bank Account Number:	null
<b>Total Due</b>	<b>\$ 474.89</b>	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
<b>Total Amount</b>		<b>\$ 474.88</b>

**Statement Summary**

Existing Services (Monthly Billing)					
Description	Quantity	Unit Price	Service Charges	Usage Charges	Total
<b>Corporate</b>					
Branch Office	3	\$ 49.99	\$ 94.98	\$ 0.00	\$ 94.98
<b>Taxes</b>					<b>\$ 0.00</b>
<b>Sub-Total</b>			<b>\$ 94.98</b>	<b>\$ 0.00</b>	<b>\$ 94.98</b>
<b>Los Angeles</b>					
Virtual Office Unlimited	3	\$ 39.99	\$ 75.98	\$ 0.00	\$ 75.98
<b>Taxes</b>					<b>\$ 0.00</b>
<b>Sub-Total</b>			<b>\$ 75.98</b>	<b>\$ 0.00</b>	<b>\$ 75.98</b>
<b>Chicago</b>					
Virtual Office Unlimited	3	\$ 39.99	\$ 75.98	\$ 0.00	\$ 75.98
<b>Taxes</b>					<b>\$ 0.00</b>
<b>Sub-Total</b>			<b>\$ 75.98</b>	<b>\$ 0.00</b>	<b>\$ 75.98</b>
<b>Austin</b>					
Virtual Office Unlimited	9	\$ 39.99	\$ 227.94	\$ 0.00	\$ 227.94
<b>Taxes</b>					<b>\$ 0.00</b>
<b>Sub-Total</b>			<b>\$ 227.94</b>	<b>\$ 0.00</b>	<b>\$ 227.94</b>
<b>Total</b>					<b>\$ 474.88</b>

**Taxes & Fees**

Existing Services		Amount
<b>From 07-01-2015 To 07-31-2015</b>		
Description		
EP11 Service Fee (US only)		\$ 0.00
Regulatory Recovery Fee <sup>5</sup>		\$ 0.00
State 911 Fee		\$ 0.00
Universal Service Surcharge		\$ 0.00
<b>Total</b>		<b>\$ 0.00</b>

**Usage Summary**

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

**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.	Monthly Service List Price	Promo Discount	Adjusted Price	Usage Charge	Taxes & Fees	Total
<b>New Services (18) From 07-01-2015 To 07-31-2015</b>								
07-01-2015	Branch Office		\$ 49.99	\$ 0.00	\$ 31.00	\$ 0.00	\$ 0.00	\$ 31.00
07-01-2015	Branch Office		\$ 49.99	\$ 0.00	\$ 31.00	\$ 0.00	\$ 0.00	\$ 31.00
07-01-2015	Branch Office		\$ 49.99	\$ 0.00	\$ 31.00	\$ 0.00	\$ 0.00	\$ 31.00
<b>Cost Center: austin Services (0)</b>								
07-01-2015	Virtual Office Unlimited	1-408-550-5829	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5830	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5831	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5832	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5833	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5834	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5835	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5836	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5837	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	austin Sub Total		\$ 359.91	\$ 0.00	\$ 227.94	\$ 0.00	\$ 0.00	\$ 227.94
<b>Cost Center: chicago Services (3)</b>								
07-01-2015	Virtual Office Unlimited	1-408-550-5828	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5827	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5828	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	chicago Sub Total		\$ 119.97	\$ 0.00	\$ 75.98	\$ 0.00	\$ 0.00	\$ 75.98
<b>Cost Center: los angeles Services (3)</b>								
07-01-2015	Virtual Office Unlimited	1-408-550-5823	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5824	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	Virtual Office Unlimited	1-408-550-5825	\$ 39.99	\$ 0.00	\$ 25.33	\$ 0.00	\$ 0.00	\$ 25.33
07-01-2015	los angeles Sub Total		\$ 119.97	\$ 0.00	\$ 75.98	\$ 0.00	\$ 0.00	\$ 75.98
<b>Total</b>			<b>\$ 749.82</b>	<b>\$ 0.00</b>	<b>\$ 474.89</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 474.89</b>

**International Usage**

Country	Usage(minutes)	Usage Charge
No international usage.		

**Adjustments**

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

**Additional Information:**

<sup>1</sup> 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.

<sup>2</sup> Monthly Service Charges apply to the period 08-01-2015 To 08-31-2015

<sup>3</sup> Usage Charges apply to the period 07-01-2015 To 07-31-2015

<sup>4</sup> 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 EP11. 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.

<sup>5</sup> 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, EP11, 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.

<sup>6</sup> This Month's Total - Includes activity and charges for the time indicated. Does not include payments for prior balances.

<sup>7</sup> Promo Discount - Limited time promotional offer.

Bill view is displayed @ 08-04-2015 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.

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

Home > Billing > Statements

**BILLING**

- > Statements
- > Billing Profile
- > Billing Preferences
- > Cost Centers

**Statements**

Below are your statements for the past 18 months.  
View Payment History

Statement Date	Amount	Status	Consolidated	Actions
04-01-2016	\$8,863.39	Past Due	Yes	<a href="#">View</a>
03-01-2016	\$8,863.39	Past Due	Yes	<a href="#">View</a>
02-01-2016	\$8,863.39	Past Due	Yes	<a href="#">View</a>

**Activity Since Last Payment**

Currency: \$ US Dollar

View activity since your last payment.  
Next payment will be processed 03-02-2017

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

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

Home > Billing > Statements

**BILLING**

- > Statements
- > Billing Profile
- > Billing Preferences
- > Cost Centers

**Statements**

Below are your statements for the past 18 months.  
View Payment History

Statement Date	Amount	Status	Consolidated	Actions
04-01-2016	\$8,863.39	Past Due	Yes	<a href="#">View</a>
03-01-2016	\$8,863.39	Past Due	Yes	<a href="#">View</a>
02-01-2016	\$8,863.39	Past Due	Yes	<a href="#">View</a>

**Activity Since Last Payment**

Currency: \$ US Dollar

[View activity](#) since your last payment.  
Next payment will be processed 03-02-2017

## 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**.

Account Number	Ext	Phone Number	Extension User Name	Phone System Name	Service Type	Payment Information	Status	Actions
P8B00000174173	3001	(210) 500-1448	R.A.	reynavodaplex	Virtual Extension	Visa *****1111, Exp 1/2025	Active	Update
P8B00000130328	1001	(555) 131-9467	Reyna Arzola	reynavodaplex	Unlimited Extension	Visa *****1111, Exp 1/2025	Pending	Update
P8B00000130329	1001		Reyna Arzola	reynavodaplex	iPhone Application	Visa *****1111, Exp 1/2025	Pending	Update

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**.

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



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

- 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	xxxxxxxxxxxx8431	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 Onel Drive San Jose CA, USA 95131	Edit   Delete
Select	ACH	Nishant Bank	xxxxx8787		Nishant Jha		Edit

**Account Status** 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	(568) 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

- 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:  What is this?

CVV:

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**.

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

Home > Billing > Billing Profile

**Billing Profile - Unconsolidated**

Billing Preference - Unconsolidated (Individual or grouped costs are billed to multiple payment sources) [Change To Consolidated Billing](#)

**Account Status**

Account Number	Ext	Phone Number	Extension User Name	Phone System Name	Service Type	Payment Information	Status	Actions
P8B00000174173	3001	(210) 500-1448	R A	reynavodaplex	Virtual Extension	Visa *****1881, Exp 1/2025	Active	<a href="#">Update</a>
P8B00000130328	1001	(558) 131-9487	Reyna Arzola	reynavodaplex	Unlimited Extension	Visa *****1881, Exp 1/2025	Pending	<a href="#">Update</a>
P8B00000130329	1001		Reyna Arzola	reynavodaplex	iPhone Application	Visa *****1881, Exp 1/2025	Pending	<a href="#">Update</a>

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



**Update Billing Profile**

**Billing Information**

Payment Type:  Debit Bank Account (ACH)  Credit Card  Invoice

Country: USA

Address Line 1: 2125

Address Line 2: onel drive\_1

City: SFO

State: CA

Postal Code: 94103

[Add New Credit Card](#) [Delete Credit Card\(s\)](#)

[Edit Card Info](#)

**Services Billed to this Credit Cards**

Account Number	Ext	Phone Number	Extension User Name	Phone System Name	Service Type	Status
P8B00000174173	3001	(210) 500-1448	R A	reynavodaplex	Virtual Extension	Active
P8B00000130328	1001	(558) 131-9487	Reyna Arzola	reynavodaplex	Unlimited Extension	Pending Activation
P8B00000130329	1001		Reyna Arzola	reynavodaplex	iPhone Application	Pending Configuration

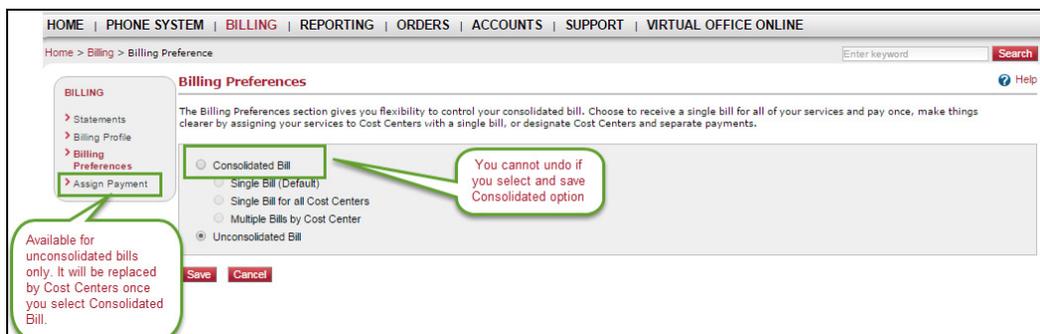
## Enterprise Users

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.

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

- Click **Save**.
- 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.

- Click **Save**.
- Click **OK**.  
Click **Cost Centers** in the top navigation bar.  
You now see a list of cost centers for your existing branches.

Home > Billing > Cost Center Enter keyword

**BILLING**

- > Statements
- > Billing Profile
- > Billing Preferences
- > **Cost Centers**

**Cost Centers** [Help](#)

All add-on new orders are assigned to the corporate cost center by default. If desired, please move them under individual cost center.

First  Last Cost Centers Per Page: 10

Cost Center Name	Cost Center Contact	Branch Name	# Of Accounts	
San Jose	Sarah Thomas	San Jose	21	<input type="button" value="Edit"/>
San Francisco	Sarah Thomas	San Francisco	4	<input type="button" value="Edit"/>

To decouple Branches from its Cost Centers, go to Billing Preferences and make the appropriate selection



**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**.

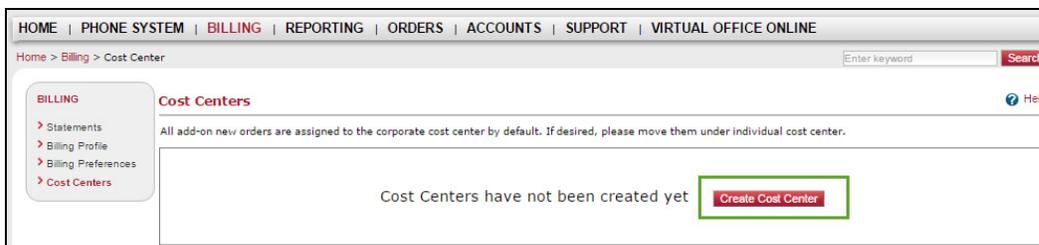


### Create a Cost Center Manually

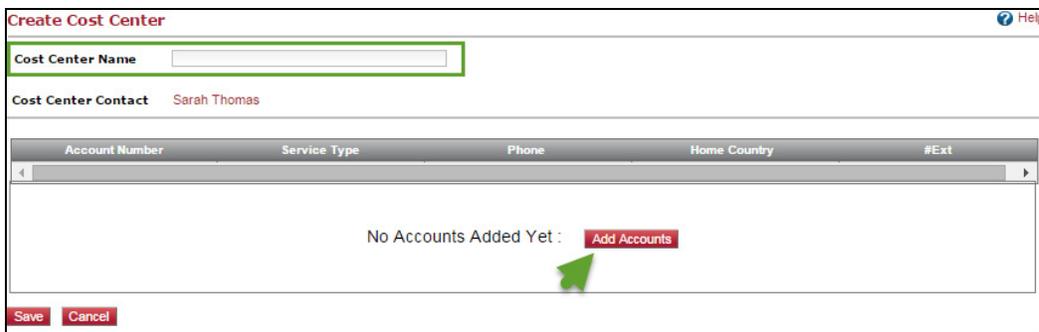
In the manual setup, define a cost center based on accounts but not mapped to branches. In this case, changes done to branches are not reflected in cost centers.

#### 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**.



- 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](#).

- Click **Add**.

**Manage Account - Cupertino**

**Existing Accounts**

Please select account(s) from the Available Accounts list and click on the Add button.

**Available Accounts**

To search for an account, type the account number, User name, Ext or Phone number and hit the search button.

**Quick Search**

Search by Account Number, Ext or Phone Number

Select account(s) and click on the Add button.

Account Number	Ext	Phone	Extension User Name	Phone System Name	Service Type	Home Country	Account Status
<input checked="" type="checkbox"/>	P8B000000085824	1003	16505462992	John Smith	specialtycookies Unlimited Extension	USA	Active
<input checked="" type="checkbox"/>	P8B000000085826	1002	16506462988	Sarah Thomas	specialtycookies Metered Extension	USA	Active
<input checked="" type="checkbox"/>	P8B000000085830	1008		Sarah Thomas	specialtycookies Overhead Pricing	USA	Active
<input checked="" type="checkbox"/>	P8B000000085831	1007	14086278740	Jean Andje	specialtycookies Unlimited Extension	USA	Active
<input checked="" type="checkbox"/>	P8B000000085833	1006	15556480703	Sarah Thomas	specialtycookies Basic Extension	USA	Active
<input checked="" type="checkbox"/>	P8B000000085834	1001	16506463018	Sarah Thomas	specialtycookies Unlimited Extension	USA	Active
<input checked="" type="checkbox"/>	P8B000000085836	1005	16506463020	Suzy White	specialtycookies Shared Extension	USA	Active
<input checked="" type="checkbox"/>	P8B000000085837	1001	15109625321	Sarah Thomas	specialtycookies Virtual Number	USA	Active
<input type="checkbox"/>	P8B000000085838	444	18609506772	Sarah Thomas	specialtycookies Toll-Free Number	USA	Active
<input type="checkbox"/>	P8B000000085870			Sarah Thomas	specialtycookies Switchboard Software	USA	Active

- Click **Save**.

The cost center is created and added to the list.

- Click **Edit** to rename or manage the cost center accounts, or click **Delete** if you wish to remove the cost center.

**Cost Centers**

All add-on new orders are assigned to the corporate cost center by default. If desired, please move them under individual cost center.

First  Last Cost Centers Per Page | 10

Cost Center Name	Cost Center Contact	# Of Accounts	
San Jose	Sarah Thomas	21	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
San Francisco	Sarah Thomas	4	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Cupertino	Sarah Thomas	8	<input type="button" value="Edit"/> <input type="button" value="Delete"/>



**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.

The screenshot shows the 'Billing Preferences' page in a web application. The navigation bar at the top includes links for HOME, PHONE SYSTEM, BILLING, REPORTING, ORDERS, ACCOUNTS, SUPPORT, and VIRTUAL OFFICE ONLINE. The breadcrumb trail is 'Home > Billing > Billing Preference'. A search bar is present with the text 'Enter keyword' and a 'Search' button. A 'Help' icon is also visible. On the left, a sidebar menu lists 'BILLING' with sub-items: 'Statements', 'Billing Profile', 'Billing Preferences' (highlighted with a green box), and 'Cost Centers'. The main content area is titled 'Billing Preferences' and contains a descriptive paragraph: 'The Billing Preferences section gives you flexibility to control your consolidated bill. Choose to receive a single bill for all of your services and pay once, make things clearer by assigning your services to Cost Centers with a single bill, or designate Cost Centers and separate payments.' Below this, there are four radio button options: 'Consolidated Bill', 'Single Bill (Default)', 'Decouple Cost Centers from Branches' (checked and highlighted with a green box), 'Single Bill for all Cost Centers', and 'Multiple Bills by Cost Center'. At the bottom of the form are 'Save' and 'Cancel' buttons.

## 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:

Cost Center Contact: Sarah Thomas

Branch Name: San Jose

---

**Manage Accounts**

First  Last Accounts Per Page: 10

Account Number	#Ext	Phone	Extension User Name	Phone System Name	Service Type	Home Country	Account Status
P8B00000085622	1004	16508463006	Sarah Thomas	specialtycookies	Global Extension	USA	Active
P8B00000087229	1004		Sarah Thomas	specialtycookies	VO Online	USA	Active
P8B00000088788	1017	12105503922	Sarah Thomas	specialtycookies	Virtual Number	USA	Active
P8B000000105973	1017	15573010101	John Smith	specialtycookies	Unlimited Extensio	USA	Active
P8B000000108003	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

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 Accounts Per Page: 10

Choose to Unassign / Reassign

Unassign From: San Francisco

Reassign To: San Jose

	Phone	Extension User Name	Phone System Name	Service Type	Home Country	Account Status
<input checked="" type="checkbox"/>	P8B000000131633 1031 15581319400	Sarah Thomas	specialtycookies	Unlimited Extension	USA	Active
<input type="checkbox"/>	P8B000000131634 1030 14083297174	Darren Hakeman	specialtycookies	Unlimited Extension	USA	Active
<input type="checkbox"/>	P8B000000131713 1031	Sarah Thomas	specialtycookies	VO Online	USA	Active
<input type="checkbox"/>	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 screenshot shows the 'Available Accounts' window. At the top, there is a search bar with the text 'To search for an account, type the account number, User name, Ext or Phone number and hit the search button.' Below the search bar are 'Search' and 'Reset' buttons. A red box highlights the 'Add' button in the top right corner. Below the search bar, there is a table of accounts with columns: Account Number, Ext, Phone, Extension User Name, Phone System Name, Service Type, Home Country, and Account Status. The first row is selected, and a red box highlights the 'Add' button. At the bottom of the window, there are 'Save' and 'Cancel' buttons.

Account Number	Ext	Phone	Extension User Name	Phone System Name	Service Type	Home Country	Account Status
<input checked="" type="checkbox"/>			Sarah Thomas	specialtycookies	Switchboard Software	USA	Active
<input type="checkbox"/>			Sarah Thomas	specialtycookies	Call Queue	USA	Active
<input type="checkbox"/>			Sarah Thomas	specialtycookies	VO Reports	USA	Active
<input type="checkbox"/>			Conrad Lee	specialtycookies	VO Reports	USA	Active
<input type="checkbox"/>			Sarah Thomas	specialtycookies	VO Reports	USA	Active
<input type="checkbox"/>			Sarah Thomas	specialtycookies	VO Reports	USA	Active
<input type="checkbox"/>			Sarah Thomas	specialtycookies	VO Reports	USA	Active
<input type="checkbox"/>			Sarah Thomas	specialtycookies	VO Reports	USA	Active
<input type="checkbox"/>			Sarah Thomas	specialtycookies	VO Reports	USA	Active
<input type="checkbox"/>			Sarah Thomas	specialtycookies	VO Reports	USA	Active

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.

**Account Manager** Company Name: Specialty Cookies | Main Number: (510) 962-5321

8x8, Inc. Welcome, Phillip Liu | Sign Out  
Email: pliu@8x8.com  
Edit My Profile Account: Business

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

Home > Reporting > Run/Schedule Enter keyword

**REPORTING**

- > Run/Schedule
- > Manage Schedules
- > View Reports

**Run/Schedule**

Notice: The report display formats have changed. [Click here to see examples of the new formats.](#)

**Report Type**

Call Logs   Run report now  Schedule report

**Display Format**

Detailed Report

**Call Report Time Filter**

Select the time period for this report.

**Report Timeframe**  Start Date: Mar 05 2015 Time (HH:MM): 12:00 AM

**Time Zone**  End Date: Mar 05 2015 Time (HH:MM): 11:59 PM

Note: Date range cannot exceed 3 months

**Data Filters**

Select the number type then choose or search for the number(s) for this report.

**Number Types**

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

Enter extension number, phone number or caller ID.

Ext	Phone Number	Caller ID	DID Type
<input type="checkbox"/>	444 (650) 054-7455		Virtual Number
<input type="checkbox"/>	1001 (610) 962-6321		Virtual Number
<input type="checkbox"/>	444 (866) 950-6772		Toll-Free Number
<input type="checkbox"/>	1001 (850) 646-3018	Phillip Liu	Unlimited Extension
<input type="checkbox"/>	1002 (850) 646-2988	Sukhanya Rajan	Metered Extension
<input type="checkbox"/>	1003 (850) 646-2992	Sarah Thomas	Unlimited Extension
<input type="checkbox"/>	1004 (850) 646-2998	Phillip Liu	Global Extension

**Calls Direction**  All

External Phone Number



**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.

Enter extension number, phone number or caller ID.

First   Extensions Per Page

<input type="checkbox"/>	Ext	Phone Number	Caller ID	DID Type
<input checked="" type="checkbox"/>	1001	(408) 827-8959	AJ York	Unlimited Extension
<input checked="" type="checkbox"/>	1002	(408) 786-9021	Hugo Olortegui	Unlimited Extension
<input type="checkbox"/>	1003	(408) 786-9106	Beth Carney	Unlimited Extension
<input type="checkbox"/>	1004	(408) 786-9050	qatestblee1 1004	Unlimited Extension
<input type="checkbox"/>	1005	(408) 786-9051	qatestblee1 1005	Unlimited Extension
<input type="checkbox"/>	1006	(408) 786-9121	qatestblee1 1006	Shared Extension
<input type="checkbox"/>	1007	(408) 786-9161	qatestblee1 1007	Shared Extension
<input type="checkbox"/>	1008	(408) 786-9026	qatestblee1 1008	Softalk Premium (VO)

- 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**.

**Report Scheduling Settings**

Name report and set schedule.

Report Name

Email Download Notifications To   Viewable by all admins

Report Summary : Time Frame : Yesterday, Daily every 1 day(s) starting on Mar 18 2013 at 12:0 AM US/Pacific. Ends Never.

- 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.

**Report Schedule**

Repeats : Daily

Repeat every : 1 days

Starts on : Mar 18 2013

Time(HH:MM): 12:00 AM

Time Zone : US/Pacific

Ends :  Never  
 After  
 On

Summary : Daily

Done Cancel

- 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.

The screenshot displays the 'Check Order Status' page in the 8x8 Account Manager. The page header includes the 8x8 logo, '8x8, Inc.', and user information for 'AcmeJets, Inc.' with email 'nalini@8x8.com'. The navigation bar contains links for HOME, PHONE SYSTEM, BILLING, REPORTING, **ORDERS**, ACCOUNTS, SUPPORT, and VIRTUAL OFFICE ONLINE. The main content area features a search bar and a table of orders placed in the last 90 days.

Order ID	Order Date	Status	Total Price	Tracking Number	Ship Date	Actions
AO1000203436	02-25-2015	Hold	\$75.00			<a href="#">View</a>
AO1000203394	02-20-2015	Complete	\$279.90			<a href="#">View</a>
CO1000203385	02-19-2015	Not Shipped	\$4,400.14			<a href="#">View</a>

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**.

Search for Orders

Order Date Between  and

Order ID

Status

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			<a href="#">View</a>
▶ AO1000004074	09-06-2011	Complete	\$75.00			<a href="#">View</a>
▶ AO1000004068	08-25-2011	Complete	\$72.04			<a href="#">View</a>
▶ CO1000004064	08-25-2011	Complete	\$79.98			<a href="#">View</a>

## 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**.

**Select Service Type**

**Business**  
Virtual Office phone service

**Virtual Office Solo**  
Business phone service for one

**Virtual Meeting**  
Web conferencing service

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.



**Select an existing Service Location Address**

810 W MAUDE AVE SUNNYVALE CA 94085 -2910 USA ▼

---

**Enter a New Service Location Address**

**Country \***  
United States ▼

**Street Number \***  
810

**Pre-Directional**      **Street Name \***      **Street Name Suffix Post Directional**

W - West ▼      MAUDE      Avenue ▼      ▼

**Secondary Location**      **Unit/Other**

▼      ▼

**City \***      **State \***      **Zip Code \***

SUNNYVALE      California ▼      94085      2910

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

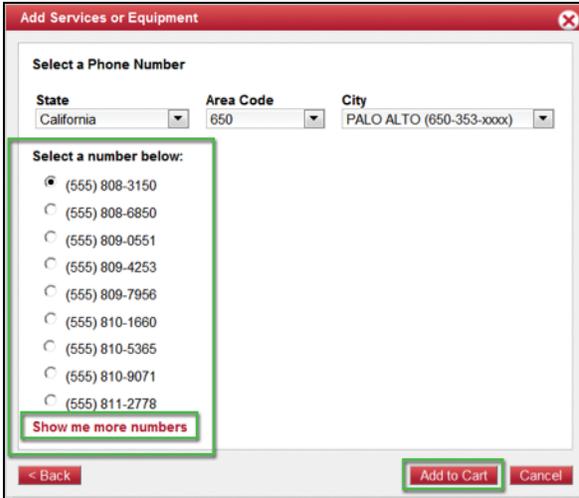
7. Click **Add Services or Equipment** to select the services you would like to purchase.

What would you like to purchase?

- Phone Extension**  
Add a new extension to your business.
- Fax Extension**  
Add a fax extension, works with standard fax machines.
- Virtual Extension**  
Great for information-only announcements such as addresses, driving directions, promotions, product tips. Includes voicemail box. No phone required.
- Shared Line Extension**  
Used when multiple people share the responsibility for answering the same line.
- Toll Free Number**  
Provide US callers with the ability to call you for free.
- Virtual Number**  
Often used as a main number, rings to primary number(s) or auto attendant at your company. Can have same or different area code.
- Ring Group**  
Add a ring group so multiple extensions can share the distribution of incoming calls.
- Auto Attendant**  
Add another Auto Attendant to your PBX.
- Accessories**  
Add on headsets, routers or other accessories.

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.



The screenshot shows a dialog box titled "Add Services or Equipment" with a close button in the top right corner. Inside the dialog, there is a section titled "Select a Phone Number". This section contains three dropdown menus: "State" (set to "California"), "Area Code" (set to "650"), and "City" (set to "PALO ALTO (650-353-xxxx)"). Below these dropdowns is a list of phone numbers under the heading "Select a number below:". The first number, "(555) 808-3150", is selected with a radio button. Other numbers include "(555) 808-8850", "(555) 809-0551", "(555) 809-4253", "(555) 809-7956", "(555) 810-1660", "(555) 810-5365", "(555) 810-9071", and "(555) 811-2778". A button labeled "Show me more numbers" is located below the list. At the bottom of the dialog, there are three buttons: "< Back", "Add to Cart", and "Cancel".

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**.



- Select the service type you want to upgrade.

**Upgrade/ Replace Services and Equipment**

**STEPS:** Account Type » Select Upgrade Services » Billing & Shipping Information » Review & Confirm

To upgrade your current equipment or existing service plans, select your account and click **Continue**.

**Which service type would you like to upgrade?**

**Business**  
Virtual Office phone service

**Continue**

- Click **Continue**.
- 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.

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

Home > Orders > Upgrade Services Enter keyword  **Search**

**ORDERS**

- > Check Order Status
- > Buy New Services
- > **Upgrade Services**

**Upgrade/ Replace Services and Equipment** Help

**STEPS:** Account Type » Select Upgrade Services » Billing & Shipping Information » Review & Confirm

Choose the plan and/or equipment you would like to upgrade.

Service Plan	Equipment	Account Status	Name	Phone Number	Extension
<input type="radio"/> Unlimited Extension	Aastra IP 6755i Deskphone	Active	Phillip Liu	(650) 646-3018	1001
<input type="radio"/> Unlimited Extension	Polycorn SoundPoint IP 550	Active	John Smith	(650) 646-2992	1003
<input checked="" type="radio"/> Global Extension	Polycorn SoundPoint IP 550	Active	Sarah Thomas	(650) 646-3006	1004
<input type="radio"/> Shared Line Unlimited Extn.		Active	Suzy White	(650) 646-3020	1005
<input type="radio"/> IP Phone Basic: Extension - No Fees	Aastra IP 6755i Deskphone	Active	Specialty Cookies	(555) 648-0703	1006
<input type="radio"/> Unlimited Extension	Virtual Office Softphone	Active	Jean Andje	(408) 627-6740	1007

- Click **Continue**.
- 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.

- 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 \*.



**Billing Payment Information**

**Select an Existing Credit Card**

---

**Enter a New Credit Card**

**Credit Card Type \*** 
**Credit Card Number \*** 
**Card ID (CVV2) \*** 
What is this?

**Name on Card \*** 
**Expiration Date \***

**Billing Address**  Same as Service Address

**Address 1 \***

**Address 2**

**City \*** 
**State \*** 
**Zip Code \***

**Country \***

- 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.

**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.

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	Nickname	Email Address
Edit   Reset Password   Disable   Delete	Emily	Diokenson	Emily	nainin@8x8.com
Edit   Reset Password   Disable   Delete	Maya	Rudolph	Maya	nainin@8x8.com
Edit   Reset Password   Disable   Delete	Nancy	Gill		nainin@8x8.com
Edit   Reset Password   Disable   Delete	Rob	Shasta		marzieh.fadaee@8x8.com
Edit   Reset Password   Disable   Delete	Sarah	Thomas	stomas	marzieh.fadaee@8x8.com
Edit   Reset Password   Disable   Delete	john	smith	johny	nainin@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\_acmejetsinc\_...csv Show all downloads...



**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**.

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

**Customize View**

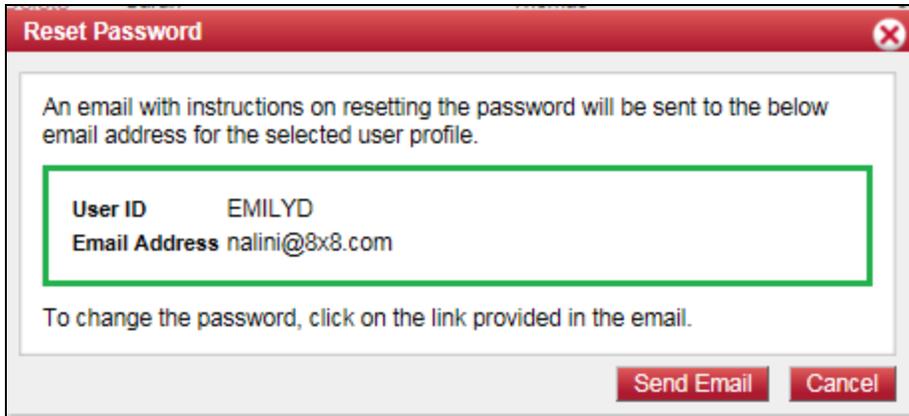
You can hide or show columns, and create additional customized fields by clicking Edit Viewable / Hidden Fields.

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

Action	First Name	Last Name	Nickname	Email Address
Edit   <b>Reset Password</b>   Disable   Delete	Emily	Dickenson	Emily	naini@8x8.com
Edit   Reset Password   Disable   Delete	Maya	Rudolph	Maya	naini@8x8.com
Edit   Reset Password   Disable   Delete	Nancy	Gill		naini@8x8.com
Edit   Reset Password   Disable   Delete	Rob	Shasta		marzieh.fadaee@8x8.com
Edit   Reset Password   Disable   Delete	Sarah	Thomas	stomas	marzieh.fadaee@8x8.com
Edit   Reset Password   Disable   Delete	john	smith	johny	naini@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]

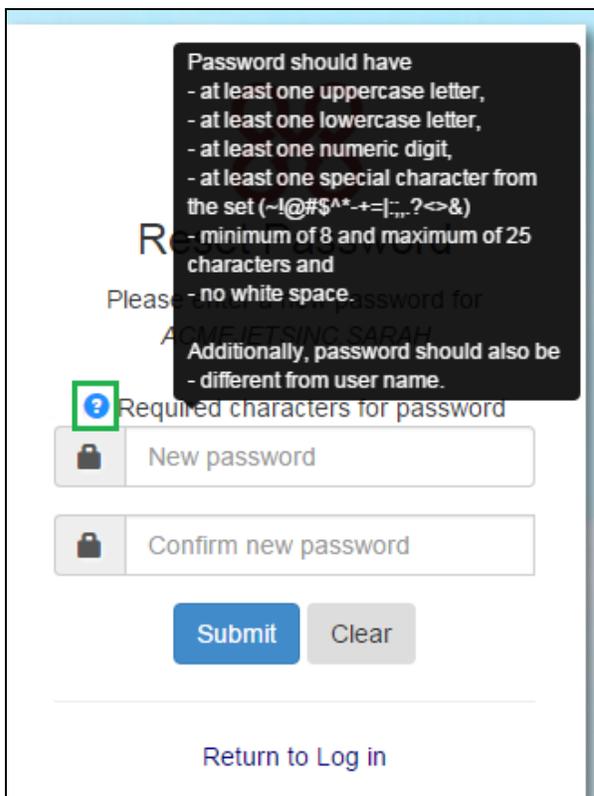
- The **Reset Password** confirmation window opens.



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

- 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).

The screenshot shows the 'Update User Profile' form with the following fields and values:

- First Name \*: John
- Last Name \*: Smith
- Nickname
- Email Address \*: jsmith@8x8.com
- Job Title: Product Manager
- Department: Product Management
- Location: San Jose
- User Name \*: JOHNS
- Bookmark (Custom Field)
- Trunk # (Custom Field)
- Region (Custom Field)
- Federation ID
- SalesForce ID: js@8X8.COM
- Zendesk ID
- NetSuite ID
- Mobile
- Language: English (U.S.)
- Time Zone: US/Eastern
- Directory Scope:  Branch  Customer  PBX

At the bottom right, there are 'Save' and 'Cancel' buttons. A note at the bottom left of the form states: '\*Indicates Required Fields'.

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**.

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

**Account Manager** Company Name: AcmeJets, Inc

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

Account: Business

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

Home > Accounts > User Profiles

**ACCOUNTS**

- User Profiles
- Privileges
- Communication Preferences
- Contact Directory

**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	Nickname	Email
Edit   Reset Password   Disable	John	Smith	smithy	Smith@8x8.com
Edit   Reset Password   Disable	Rob	Shasta		Shasta@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

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

**Edit User Profile Fields**

Check the boxes you want to have visible, leave unchecked to hide. To use custom fields, check the box and provide a header label for each field.

First Name

Last Name

Nickname

Email Address

Job Title

Department

Location

User Name

Assigned to Extension

Assigned to Ring Group

Custom Field 1 (max 25 chars)  Header label: Bookmark Field Type: Text

Custom Field 2 (max 25 chars)  Header label: Trunk # Field Type: Text

Custom Field 3 (max 25 chars)  Header label: Region Field Type: Text

Created Date

Status

Disabled Date

Federation ID

SFDC ID

Mobile

Zendesk ID

NetSuite ID

Directory Scope

Language

Time Zone

Save Cancel

- 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**.

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

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

Home > Accounts > User Profiles

**ACCOUNTS**  
 > **User Profiles**  
 > Privileges  
 > Communication Preferences  
 > Contact Directory

**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	Nickname	Email
Edit   Reset Password   Disable	John	Smith	smithy	Smith@8x8.com
Edit   Reset Password   Disable	Rob	Shasta		Shasta@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

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

**Edit User Profile Fields**

Check the boxes you want to have visible, leave unchecked to hide. To use custom fields, check the box and provide a header label for each field.

First Name

Last Name

Nickname

Email Address

Job Title

Department

Location

User Name

Assigned to Extension

Assigned to Ring Group

Custom Field 1  Header label:  Field Type:

Custom Field 2  Header label:  Field Type:

Custom Field 3  Header label:  Field Type:

Created Date

Status

Disabled Date

Federation ID

SFDC ID

Mobile

Zendesk ID

NetSuite ID

Directory Scope

Language

Time Zone

Save Cancel

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.

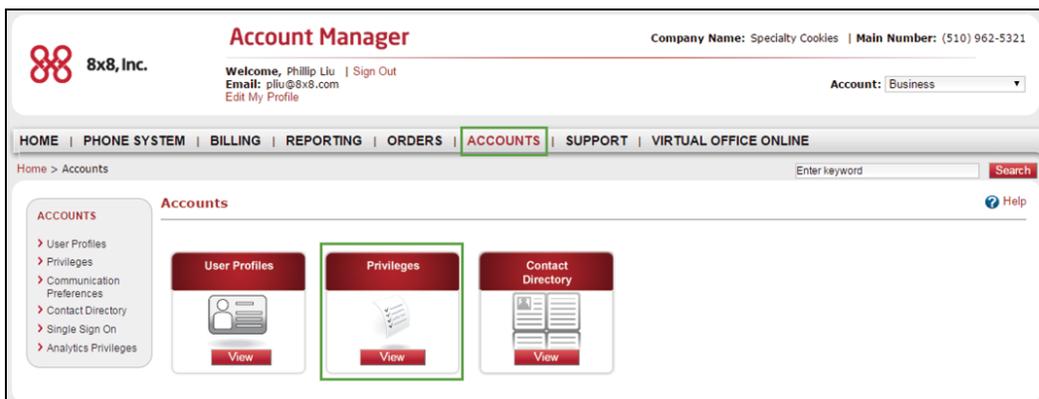


### Grant Privileges or Add a Second Admin

To grant privileges to an individual, you must first create a user profile for them.

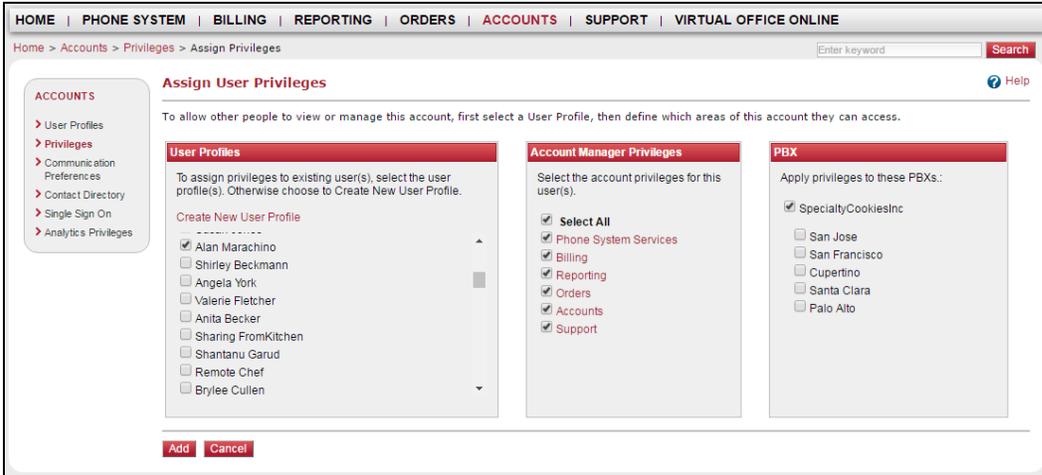
For details, refer to [Create User Profiles](#).

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: <ul style="list-style-type: none"> <li>■ Extensions</li> <li>■ Auto Attendant</li> <li>■ Virtual and Toll-Free Numbers</li> <li>■ Ring Groups</li> </ul>

Privilege Category	Sub-Privileges
	<ul style="list-style-type: none"> <li>■ Music on Hold</li> <li>■ Call Queues</li> <li>■ Shared Lines</li> <li>■ Branches</li> <li>■ Switchboard</li> <li>■ Paging</li> <li>■ Company Settings</li> <li>■ Number Transfer Request</li> <li>■ Call Recording</li> <li>■ Edit Voicemail / Fax Notifications</li> <li>■ Group Call Pickup</li> </ul>
Contact Center	<p>The ability to create and manage:</p> <ul style="list-style-type: none"> <li>■ Contact Center Calling Plans</li> <li>■ Channel Rerouting</li> </ul>
Billing	<p>The ability to create and manage:</p> <ul style="list-style-type: none"> <li>■ Statements</li> <li>■ Billing Profile</li> <li>■ Cost Centers</li> </ul>
Reporting	<p>The ability to create and manage Call Log Reports</p>
Orders	<p>The ability to:</p> <ul style="list-style-type: none"> <li>■ Check Order Status</li> <li>■ Buy New Services</li> <li>■ Upgrade Services</li> </ul>
Accounts	<p>The ability to create and manage:</p> <ul style="list-style-type: none"> <li>■ User Profiles</li> <li>■ Privileges</li> </ul>

Privilege Category	Sub-Privileges
	<ul style="list-style-type: none"> <li>■ Communication Preferences</li> <li>■ Contact Directory</li> <li>■ Single Sign On</li> <li>■ Analytics Privileges</li> </ul>
Support	<div style="display: flex; align-items: center;"> <p><b>Note:</b> The Support options previously available through Account Manager are now available through <a href="#">the 8x8 Support site</a>. Please refer to our details on <a href="#">how to access and use 8x8 Support</a>.</p> </div>

- 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.

**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

### Edit Privileges

1. Click **Accounts** in the top navigation bar.
2. On **Privileges**, click **View**.

- 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.

- Update the user information and privileges for the selected administrator.
- If you have multiple PBXs, select which PBX these privileges apply to.
- Click **Save Changes**.
- When the dialog box appears confirming your changes, click **OK**.

### Revoke Privileges

- Click **Accounts** in the top navigation bar.
- On **Privileges**, click **View**.
- 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 <b>Revoke</b>
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.

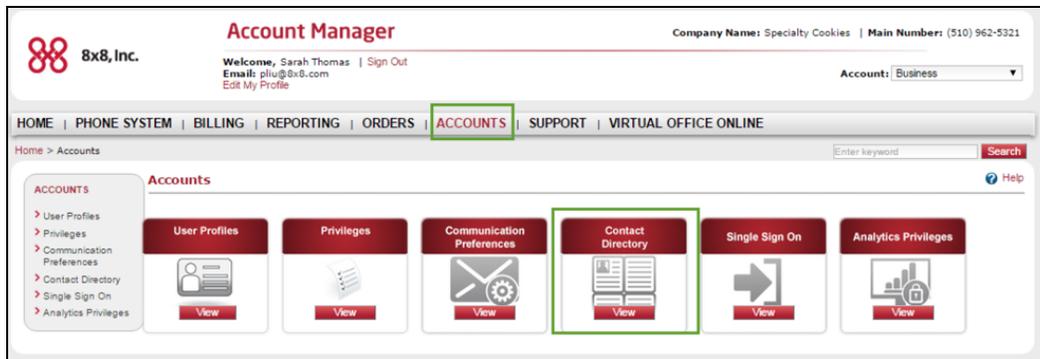
- When the dialog box appears asking you to confirm that you want to revoke all administrative privileges for that user, click **Continue**.

## 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.

**Contact Directory User Specific Display Preferences** Help

Search Reset Advanced Search Display Preferences Select Columns to Display

First 1-20 of 45 Last Profiles Per Page 20

Extension	First Name	Last Name	Department	Job Title	Contact Directory Exclude Extension	Contact Directory Exclude User Profile	Auto Attendant Exclude Extension
1001	Kelly	Morrison	Engineering	Technical Architect	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1002	Jerry	McEnroe	Facilities	Facilities Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1003	Brent	Snyder	Marketing	Analyst	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1004	Phillip	Liu			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1005	Angelique	Yu			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1006	Anita	Becker	Sales	Account Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## 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

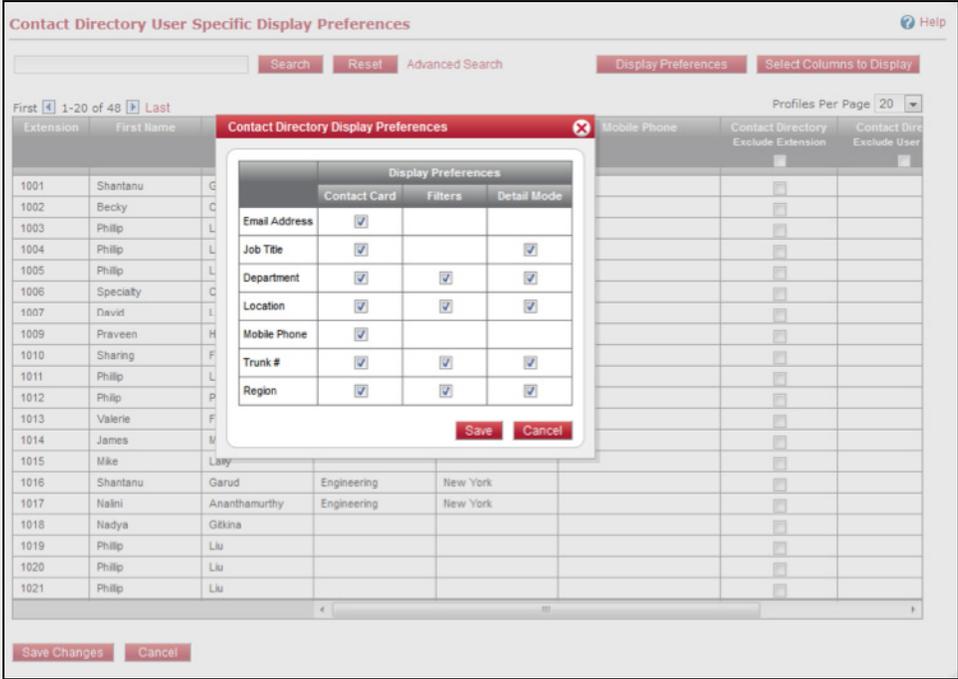
Phone system administrators can control what user profile information to display in the Contact Directory of user profiles. You can display Contact Card information such as email address, job title, and location, and also choose to filter contacts by department, or show more details for job titles.

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.



The screenshot shows the 'Contact Directory User Specific Display Preferences' dialog box. It features a search bar at the top with 'Search', 'Reset', and 'Advanced Search' buttons. Below the search bar, there are 'Display Preferences' and 'Select Columns to Display' buttons. The main area contains a table with columns for 'Extension', 'First Name', and 'Last'. A modal window titled 'Contact Directory Display Preferences' is open, showing a table with columns for 'Contact Card', 'Filters', and 'Detail Mode'. The table lists various fields with checkboxes indicating their visibility in each mode. The 'Save' button is at the bottom of the modal.

Field	Contact Card	Filters	Detail Mode
Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job Title	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trunk #	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Region	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## 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.

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

Home > Accounts > Contact Directory

**ACCOUNTS**

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

**Contact Directory User Specific Display Preferences**

Advanced Search

Profiles Per Page: 20

Extension	First Name	Last Name	Department	Job Title	Contact Directory Exclude Extension	Contact Dir Exclude User F
1001	Sarah	Thomas			<input type="checkbox"/>	
1002	Sarah	Thomas			<input type="checkbox"/>	
1003	John	Smith	Product Management	Technical Writer	<input type="checkbox"/>	
1004	Sarah	Thomas			<input type="checkbox"/>	
1005	Suzy	White			<input type="checkbox"/>	
1006	Sarah	Thomas			<input type="checkbox"/>	
1007	Jean	Andje	Engineering	Software Engineer	<input type="checkbox"/>	
1009	Sarah	Thomas			<input type="checkbox"/>	
1010	Dally	Baker	Marketing	Manager	<input type="checkbox"/>	
1011	Beth	Carney	Marketing	Marketing Director	<input type="checkbox"/>	
1012	Angela	York	Marketing	Marketing Director	<input type="checkbox"/>	
1013	Julla	Zhu	Customer Success	Sr. Director	<input type="checkbox"/>	
1014	Rika	Tandean	Customer Success	Lead	<input type="checkbox"/>	
1015	Sonlela	Magidi	Customer Success	Customer Success M	<input type="checkbox"/>	
1016	Shantanu	Garud	Engineering	Engineer	<input type="checkbox"/>	

**External Directory Upload**

Bring external contacts from Microsoft Exchange, Lync or other directories into the 8x8 Contact Directory. The external contacts are seamlessly displayed in your Contact Directory, giving you the ability to interact with external and 8x8 contacts. 8x8 Virtual Online, Virtual Office Desktop and Switchboard Pro display the contacts uploaded here.

- To download and open the Comma-Separated Values (CSV) file in Excel, click **Download CSV Template**.
- 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>.

- Once you have added all the data, **Save** the file to your computer.
- In **Accounts > Contact Directory**, click **Upload CSV Template**.

- If your browser prompts you to accept the download, click **Proceed**.

**Contact Directory User Specific Display Preferences**

Advanced Search Search Reset Display Preferences Select Columns to Display

First 1-20 of 101 Last Profiles Per Page 20

Extension	First Name	Last Name	Department	Job Title	Contact Directory Exclude Extension	Contact Dir Exclude User F
1001	Sarah	Thomas			<input type="checkbox"/>	
1002	Sarah	Thomas			<input type="checkbox"/>	
1003	John	Smith	Product Management	Technical Writer	<input type="checkbox"/>	
1004	Sarah	Thomas			<input type="checkbox"/>	
1005	Suzy				<input type="checkbox"/>	
1006	Sarah				<input type="checkbox"/>	
1007	Jean			Software Engineer	<input type="checkbox"/>	
1009	Sarah				<input type="checkbox"/>	
1010	Sally			Manager	<input type="checkbox"/>	
1011	Beth	Carney	Marketing	Marketing Director	<input type="checkbox"/>	
1012	Angela	York	Marketing	Marketing Director	<input type="checkbox"/>	
1013	Julia	Zhu	Customer Success	Sr. Director	<input type="checkbox"/>	
1014	Rika	Tandean	Customer Success	Lead	<input type="checkbox"/>	
1015	Sohlela	Magidi	Customer Success	Customer Success IV	<input type="checkbox"/>	
1016	Shantanu	Garud	Engineering	Engineer	<input type="checkbox"/>	

Save Changes Cancel

**External Directory Upload**

Bring external contacts from Microsoft Exchange, Lync or other directories into the 8x8 Contact Directory. The external contacts are seamlessly displayed in your Contact Directory, giving you the ability to interact with external and 8x8 contacts. 8x8 Virtual Online, Virtual Office Desktop and Switchboard Pro display the contacts uploaded here.

Download CSV Template Upload CSV Template

- Click **Add**.
- Locate the file you just saved, and click **Open**.
- Click **Upload**.  
If you encounter any errors, please check the error message, fix the issues in the CSV file, and upload again.
- Verify that the new information is correct, and then click **Submit**.

**Uploaded External Contacts Summary**

Review the User Profile(s) below and click Submit to accept changes.

firstName	lastName	nickName	email	phones	addresses	jobTitle	department	location	customField1	customField2	customField3	contacts	Status
Neel	Kumar	Neel	neelkumar@hotmail.com_OTHER	4086750258_OTHER	2125_OneI_drive_san Jose_CA_OTHER	Technical Writer	Techpub						NEW
Sue	Johnson	Sue	Sue.Johnson@yahoo.com_OTHER	6699005533_OTHER	2125_OneI_drive_san Jose_CA_OTHER	Support	Support						NEW
Vida	Noori	Vida	vida.noori@gmail.com_OTHER	1231234123_OTHER	2125_Orchard_ave_san Jose_ca_OTHER	Sales Rep.	Sales						NEW

Submit Cancel

The new contacts appear in the **External Directory Upload** table.

**ACCOUNTS**

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

**Contact Directory User Specific Display Preferences**

Advanced Search

First  List  Profiles Per Page: All

Extension	First Name	Last Name	Department	Job Title	Contact Directory Exclude Extension	Contact Dir Exclude User P
	Melissa	Browns	Sales	Account Manager	<input type="checkbox"/>	<input type="checkbox"/>
1022	MIKE	Reinhart	Marketing	Product Marketing IV	<input type="checkbox"/>	<input type="checkbox"/>
	MIKE	Lally			<input type="checkbox"/>	<input type="checkbox"/>
	Nalini	Ananthamurthy			<input type="checkbox"/>	<input type="checkbox"/>
	Online	Chef	Sales	Account Manager	<input type="checkbox"/>	<input type="checkbox"/>
1037	Paolo	Messina	Product Management	Product Manager	<input type="checkbox"/>	<input type="checkbox"/>
1024	Patrioe	Delorey	Customer Success		<input type="checkbox"/>	<input type="checkbox"/>
	Phil	Test			<input type="checkbox"/>	<input type="checkbox"/>
	Phillip	Liu1043			<input type="checkbox"/>	<input type="checkbox"/>
	Phillip	Liu1044			<input type="checkbox"/>	<input type="checkbox"/>
	Praveen	Hegde	Marketing	Analyst	<input type="checkbox"/>	<input type="checkbox"/>
1045	Raj	Singh			<input type="checkbox"/>	<input type="checkbox"/>
	Ramana	Gottipati	Product Management	Vice President	<input type="checkbox"/>	<input type="checkbox"/>
	Remote	Chef	Marketing	Analyst	<input type="checkbox"/>	<input type="checkbox"/>
1014	Rika	Tandean	Customer Success	Lead	<input type="checkbox"/>	<input type="checkbox"/>

**External Directory Upload**

Bring external contacts from Microsoft Exchange, Lync or other directories into the 8x8 Contact Directory. The external contacts are seamlessly displayed in your Contact Directory, giving you the ability to interact with external and 8x8 contacts. 8x8 Virtual Online, Virtual Office Desktop and Switchboard Pro display the contacts uploaded here.

First Name	Last Name	Nick Name	Email Address	Phone
Neel	Kumar	Neel	neel.kumar@hotmail.com_OTHER	4086750258_OTHER
Sue	Johnson	Sue	Sue.Johnson@yahoo.com_OTHER	6699005533_OTHER
Vida	Noori	Vida	vida.noori@gmail.com_OTHER	1231234123_OTHER

## 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.

- Under the **Accounts** menu, click **Single Sign-On**.

The screenshot shows the 8x8 Accounts configuration interface. At the top, there is a navigation bar with links for HOME, PHONE SYSTEM, CONTACT CENTER, BILLING, REPORTING, ORDERS, ACCOUNTS (highlighted), and SUPPORT. Below this is a breadcrumb trail: Home > Accounts > Single Sign On. On the left, a sidebar menu under 'ACCOUNTS' lists various options, with 'Single Sign On' highlighted. The main content area is titled 'Single Sign On' and features an 'Authentication methods' section. This section includes a checked checkbox for '8x8 Username and Password' and another checked checkbox for 'Single Sign On'. Under the 'Single Sign On' checkbox, there are two radio button options: 'SAML' (selected) and 'Google'. Below these options is a 'User Mapping Field' dropdown menu currently set to 'Automatically selected'. At the bottom of the configuration area, there are 'Save' and 'Reset' buttons.

- 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 log in to 8x8 applications.
- 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.
- Save** these settings.
- 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.



The screenshot displays the 'Update User Profile' dialog box in the Account Manager interface. The dialog box contains the following fields:

- First Name \* (Biren)
- Last Name \* (Patel)
- Nickname (Biren)
- Email Address \* (lmartinez@8x8.com)
- Job Title (Director Technical Programs)
- Department (Engineering)
- Location (San Jose)
- User Name \* (8x8.1067)
- Employee ID (Custom Field) (537901)
- Employee Hire Date (Custom Field) (5/12/2010)
- Favorite Color (Custom Field)
- Federation ID (bpatel@8x8.com) - This field is highlighted with a green box.
- MOBILE (1408824000)

The background shows a table of user profiles with columns for Assigned to Extension and Federation ID. The table contains the following data:

Assigned to Extension	Federation ID
*Ext: 1093	
*Ext: 1099	
*Ext: 1098	
*Ext: 1028	
*Ext: 1041	
*Ext: 1067	bpatel@8x8.c

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.

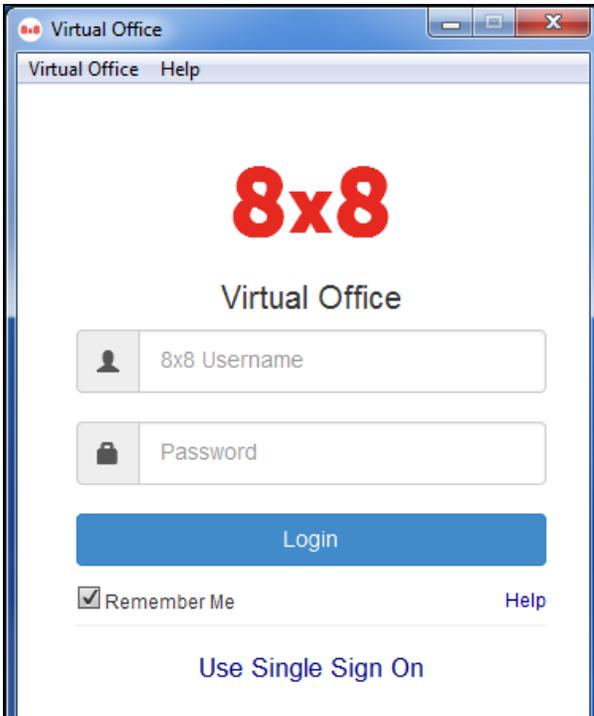


**Note:** If you have any users with 8x8 usernames that do not match their Okta usernames, you must **define the Federated ID in the user profile** for all users manually in Account Manager.

## Sign in Using Federated SSO

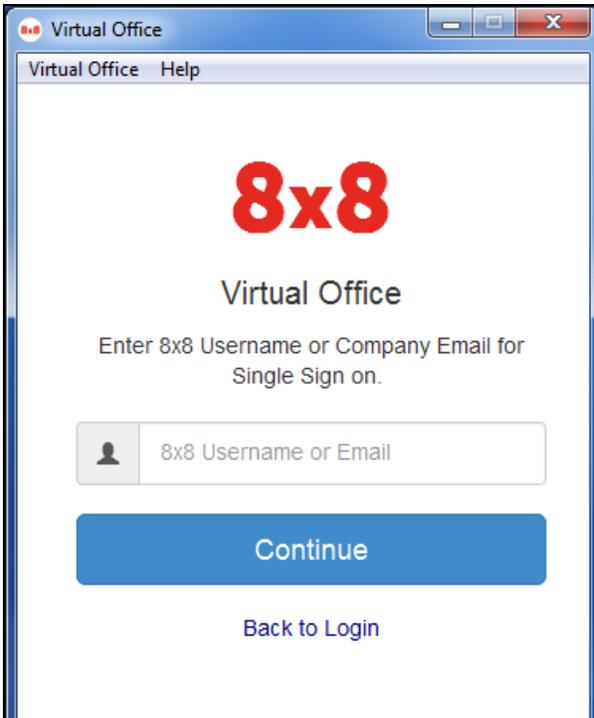
The sign-in process for 8x8 applications is similar whether it is authenticated via SAML or Google. The initial sign-in process takes users through the Virtual Office login page. Go to the 8x8 SSO login page, or launch the Virtual Office desktop app.

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.

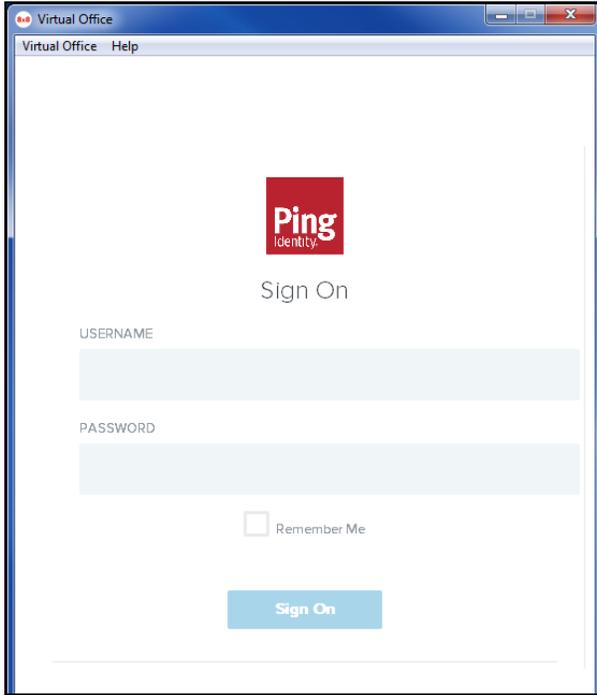


3. Click **Continue** to view your SSO options.
4. Click **Log in using SAML** to open your identity provider's login page.  
OR  
Click **Log in using Google** to open the Google login page.

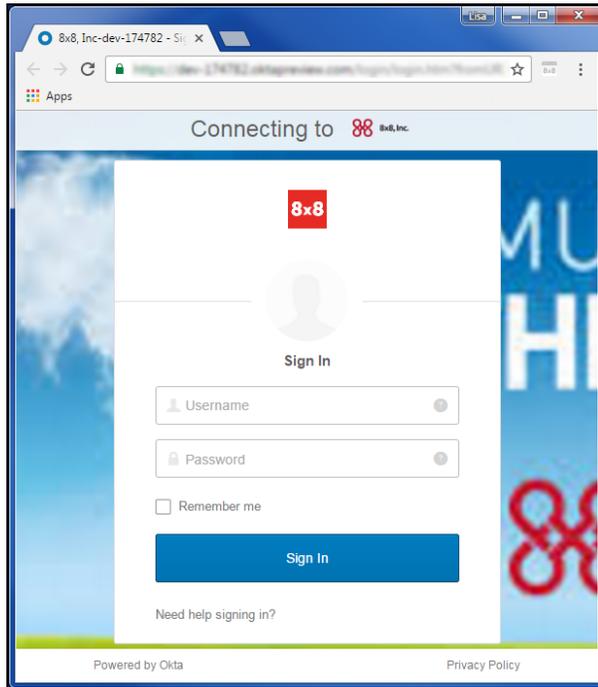


**Note:** Clicking **Clear SSO Setting** takes you back to the first login page.

- **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....**



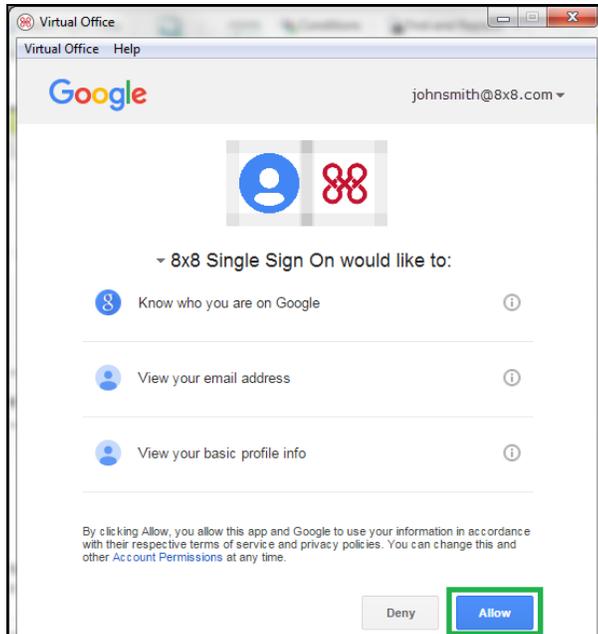
- b. Enter the credentials to log in to the identity provider.  
The application launches.



**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.

**Virtual Office - Analytics Privileges**

Please assign user privileges on this page. Analytics include:

1. Virtual Office Analytics,
2. Virtual Office Work Group Analytics and Reports, and
3. Virtual Office Monitoring and Management.

Check the box next to User Name for whom you are granting access. Click edit for additional details on report visibility. Analytics need to be purchased before they are assignable to users below.

**Brief description of user privilege assignment:**

1. Virtual Office Analytics provides extension level analytics and is assignable to all extensions on your PBX. The number of licenses available is (N/A), since all extensions can be assigned access.
2. Virtual Office Work Group Analytics and Reports is purchased as an add-on to VO Analytics. This adds Ring Group and Call Queue reporting. The number of licenses available is shown within parenthesis ( ).
3. Virtual Office Monitoring licenses is purchased as an add-on to VO Analytics. This adds Call Quality and Device Status reporting. The number of licenses available is shown within parenthesis ( ).

Search Reset

**Virtual Office - Analytics Privileges**

First 1-10 of 85 Last User Profiles Per Page 10

User Name	VO Analytics ( N/A )	VO Work Group Reports ( 5 )	VO Monitoring and Management ( 5 )	Action
ACCOUNTANNIE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit
ANGELIQUEY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit
DOOMTROLL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit
MSVAMY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit
NANANTHAMURTHY@8x8.c	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit
PHILTEST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit
PHILLIPLIU@8x8.COM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit
PLIU1043	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit
SPECIALTYCOOKIE.S RAMA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit
STHOMAS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit

Save Changes Cancel

3. Click **Edit** next to an administrator to manage their dashboard privileges.

- In the pop-up, click the drop-downs to display the available privileges.

**Virtual Office - Analytics Privileges**

**Administrator**

User ID: ACCOUNTANNIE  
Name: Annie Thomas  
Email Address: AAnnie@SpecialtyCookies.com

**VO Analytics ( N/A )**

- Company Summary
- Extensions Summary
- Call Details Records
- Active Calls
- Unreturned Calls
- Calls By DID
- Employee Summary

**VO Work Group Reports ( 4 )**

- Call Queue Call Data
- Ring Group Call Data

**VO Monitoring and Management ( 4 )**

- Device Staus Details
- Call Quality Trend and Details
- Extension Summary Details

Virtual Office - Analytics Privileges

First 1-10 of 85 Last

User Name
ACCOUNTANNIE
ANGELIQUEY
DOOMTROLL
MSWAMY
PLIU1043

User Profiles Per Page 10

Action
Edit

OK

- Select or clear the check boxes for the desired privileges at the extension level.
- 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
<b>Edit My Profile</b>	<p>The primary or secondary administrators who have access to Account Manager can configure the <b>Language</b> setting in <b>Edit My Profile</b> to communicate emails in their language of choice.</p> <p>This setting overrides the default PBX or branch language setting. It only applies to the administrator's email communications.</p>	User level
<b>Account &gt; User Profiles</b>	<p>Configure the <b>Language</b> setting for extension users to communicate emails in their language of choice.</p> <p>This setting in user profile overrides the default PBX or branch language. It only applies to the user's email communications.</p>	User level
<b>Phone System &gt; Company Settings</b>	<p>Configure the <b>Language</b> 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.</p> <p>In the absence of the individual extension user's language of choice, the language setting of branch overrides the PBX language setting.</p>	PBX level

Setting	Description	Configured At
<b>Phone System &gt; Branches</b> (Add-on subscription-based)	<p>Configure the <b>Language</b> setting for users to receive Telephony IVR messages, such as voicemail greetings in the selected language.</p> <p>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.</p>	Branch level
<b>Phone System &gt; Edit Individual Extension</b>	<p>Configure the <b>Language</b> 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.</p> <p>This setting overrides the PBX and branch language setting.</p> <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;">  <p><b>Note:</b> If you need help with setting the user language in bulk, contact 8x8 Support for help.</p> </div> <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;">  <p><b>Note:</b> 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.</p> </div>	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 6 BLF 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	Index	Index	Index	Index	Index
101	115	201	215	301	315
Index	Index	Index	Index	Index	Index
102	116	202	216	302	316
Index	Index	Index	Index	Index	Index
103	117	203	217	303	317
Index	Index	Index	Index	Index	Index
104	118	204	218	304	318
Index	Index	Index	Index	Index	Index
105	119	205	219	305	319
Index	Index	Index	Index	Index	Index
106	120	206	220	306	320
Index	Index	Index	Index	Index	Index
107	121	207	221	307	321
Index	Index	Index	Index	Index	Index
108	122	208	222	308	322
Index	Index	Index	Index	Index	Index
109	123	209	223	309	323
Index	Index	Index	Index	Index	Index
110	124	210	224	310	324
Index	Index	Index	Index	Index	Index
111	125	211	225	311	325
Index	Index	Index	Index	Index	Index
112	125	212	225	312	325
Index	Index	Index	Index	Index	Index
113	127	213	227	313	327
Index	Index	Index	Index	Index	Index
114	128	214	228	314	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	Index	Index	Index	Index	Index
117	137	217	237	317	337
Index	Index	Index	Index	Index	Index
118	138	218	238	318	338
Index	Index	Index	Index	Index	Index
119	139	219	239	319	339
Index	Index	Index	Index	Index	Index
120	140	220	240	320	340