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Overview

Understanding the Auto Attendant

The 8x8 Auto Attendant processes your incoming phone calls by allowing callers to self-direct their call to the options presented using a pre-recorded greeting. Auto Attendant gives you complete flexibility to manage a simple call flow or create a “large company” call flow to multiple departments and complex call trees.

Your Auto Attendant can be used as a virtual receptionist, allowing callers to navigate your phone system or as an overflow and after-hours tool so that incoming calls are handed promptly and properly. Having multiple submenus or linking several Auto Attendants together gives you complete control over your message and call handling.

There are a number of ways to use your Auto Attendant. It can be helpful to have an idea of how you would like to greet callers before trying to configure it. The steps outlined in this document cover the initial set up and basic guidelines. For more advanced configurations, please contact the 8x8 Customer Service team.

Flexible:

Remember, you can change the Auto Attendant configuration as your needs change. Simply select Configure AA under the My Accounts tab. You can add more Auto Attendants as your business grows.

https://myaccount.8x8.com
Before You Start

Plan out what you want your callers to experience when they call your company and how you want the Auto Attendant to handle your calls. This will help you to better define Auto Attendant schedules and rules during the set up process.

By using the Auto Attendant, you will have the ability to present your inbound callers with a number of call routing options: individual extensions, ring groups or call queues. If you want to use these services with your Auto Attendant, you must configure them first before setting up your Auto Attendant.

Initial Set-Up

The first time you set-up your Auto Attendant, you will be walked through a series of steps that will help you establish your Auto Attendant and Auto Attendant profile. An Auto Attendant profile enables you to set up your Auto Attendant schedule, phone menu and greetings. You can have multiple profiles on each of your Auto Attendants, to make managing your Auto Attendant even more convenient. However, only one profile can be active at a time for a given Auto Attendant.

What To Expect

Each 8x8 phone system comes with one Auto Attendant accessible by dialing extension 444. You also have the option of purchasing additional Auto Attendants. Each Auto Attendant comes with a system default profile. You can override this system default profile by creating your own profile and activating it.

There are two modes to configure your Auto Attendant and its profile.

1. **Scheduling** – You are required to define your business hours and after business hours. Calls are routed based on day of week and time of day. You can also schedule holidays and business hours exceptions.

2. **Phone Menu Configuration** – You can manage your phone menu options, settings, and greetings.

   **Note:** You will need to set up greetings and/or phone menu settings for everything that you scheduled before you can activate an Auto Attendant profile.

How to Call into Your Auto Attendant

You have the option of purchasing a phone number that points to your Auto Attendant. By purchasing phone numbers (toll free, local US phone numbers or even international phone numbers) for your Auto Attendant, you allow users to call directly into your Auto Attendant. You can even point multiple phone numbers to one Auto Attendant.
Primary Auto Attendant

Each 8x8 phone system comes with one Auto Attendant that has been pre-configured with a system default profile. The Auto Attendant is accessible by dialing the Primary Auto Attendant extension (444) or dialing the phone number assigned to the Primary Auto Attendant.

To customize your primary Auto Attendant, you need to create a new profile for your primary Auto Attendant. You do this by creating a profile with a customized phone menu as well as greetings, and then activating the profile.

System Default Profile

Each Auto Attendant comes with a system default profile. The system default profile has the following phone menu options and greetings:

Welcome to the Auto Attendant.

The following menu is repeated twice:

- If you know the extension you wish to reach, press 1 now.
- To dial by name, press 2.
- To leave a message, press 3.
- To access the company directory, press 4.
- To be transferred to the operator, press 0.

Once the menu cycle is over, you will hear:

- Thank you for using the Auto Attendant. Goodbye.

This system default profile is overridden when you activate a new profile on your Auto Attendant. You can revert back to the system default by deactivating your current customized profile.

Setup Ring Groups, Call Queues and Conference Bridge

If you want your Auto Attendant to transfer calls to 8x8 services such as extensions, extension voicemails, ring groups, call queues, or the conference bridge, it is best to set them up before configuring the Auto Attendant. This way you can select your phone menu options and immediately test your new Auto Attendant.

Ring Groups

Ring Groups, also known as Hunt Groups route calls to a group of 8x8 phones. A ring group has an extension number such as 201. All the extensions assigned to the ring group will ring when the calls are routed to 201 or alternatively ring in a cyclic fashion.
Schedule

Your Auto Attendant has four different scheduling options: Business Hours, Business Hours Exceptions, Holidays and After Hours.

1. **Business Hours** – Define business hours schedule
2. **Business Hours Exceptions** – Optional settings to temporarily modify your normal business schedules
3. **Holidays** – Optional, pre-defined dates for special rules to be used
4. **After-Hours Rules** – Define after-hours call routing and IVR behavior

You can set your phone menu options and settings as well as record customized greetings for each scheduling option.

Your schedule will determine which phone menu options your callers get when they call in, and which greetings will be played for those options. This allows your Auto Attendant to manage incoming callers in a logical fashion such as transferring to an operator during business hours but only transferring to a voicemail box after hours.

Holidays and exceptions will override your Business Hours settings. At the end of the Business Hours exception period, your Auto Attendant will go back to the normal schedule.

Phone Menu Options

Your Auto Attendant allows you to define how you want to process the call when a caller selects an option on their phone.

The options are shown in Table 1. The **Option Name** column is from the drop down list. The middle and right column tell you the behavior that results from your selection. You may want to print Table 1 for reference as you build the Auto Attendant profile.
<table>
<thead>
<tr>
<th>Option Name</th>
<th>What it does</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Company Directory</strong></td>
<td>Caller is routed to the company directory</td>
<td>Presents the caller with a list of extensions</td>
</tr>
<tr>
<td><strong>Conference Bridge</strong></td>
<td>Call routes to the Conference Bridge</td>
<td>Caller can access the Conference Bridge</td>
</tr>
<tr>
<td><strong>Dial By Extension</strong></td>
<td>Caller is asked for an extension number</td>
<td>Caller enters extension number and is immediately forwarded to the desired extension</td>
</tr>
<tr>
<td><strong>Dial By Name</strong></td>
<td>Caller is asked for the first three letters in the name</td>
<td>After name is selected, caller is routed to the extension of the person dialed</td>
</tr>
<tr>
<td><strong>Repeat Menu</strong></td>
<td>Repeats the current menu</td>
<td>Caller hears the same greeting repeated again</td>
</tr>
<tr>
<td><strong>Transfer to Auto Attendant</strong></td>
<td>Caller is transferred to a secondary Auto Attendant</td>
<td>Secondary Auto Attendant plays the recorded greeting and offers call routing options</td>
</tr>
<tr>
<td><strong>Transfer to Call Queue</strong></td>
<td>Caller is transferred to an available Call Queue</td>
<td>Caller is placed in the queue for the next available agent</td>
</tr>
<tr>
<td><strong>Transfer to Extension</strong></td>
<td>Caller is transferred to a telephone extension on the PBX</td>
<td>This is typically picked up by a live person or allowed to go to Voicemail</td>
</tr>
<tr>
<td><strong>Transfer to Ring Group</strong></td>
<td>Call is transferred to the Ring Group</td>
<td>Call is picked up by an agent, goes to Voicemail, or follows Ring Group forwarding options</td>
</tr>
<tr>
<td><strong>Transfer to Sub-Menu</strong></td>
<td>Call is transferred to a sub-menu on this Auto Attendant</td>
<td>Sub-menus on one Auto Attendant can go two levels deeper than the original greeting and each offer an independent greeting and options</td>
</tr>
<tr>
<td><strong>Transfer to Voicemail</strong></td>
<td>Caller is transferred to the system Voicemail</td>
<td>This is a convenient way for employees to access any voicemail service on the iPBX such as Ring Groups or any other extension voice mail by entering the extension number and password.</td>
</tr>
</tbody>
</table>

**Table 1**
Greetings

Your Auto Attendant greetings are what your callers hear when they call into your Auto Attendant. It is important to ensure that your recorded greeting is accurate and matches the settings you have selected to ensure the best caller experience.

By recording a greeting your Auto Attendant can manage incoming callers in a logical fashion such as:

- Transfer calls to Sales Ring Group during business hours.
- Transfer calls to Sales Manager's cell phone after business hours.
- Transfer CEO calls to his/her voicemail box after hours.

Your Auto Attendant has several places where a greeting is required:

- Business Hours Greeting
- After Hours Greeting

If you configured options for Business Hours Exceptions, Holidays, Submenu 1 or Submenu 2, greetings for those options are required.

**Note:** You will not be able to activate a profile unless all your greetings have been recorded or uploaded.
Key features of Additional Auto Attendants:

1. Auto Attendants can be linked together to transfer calls from one Auto Attendant to another.
2. When a caller searches by name or extension, the search occurs on all names and extensions on the PBX.
3. You can create and test Auto Attendant Profiles before making them active.
4. When you deactivate your active profile, your greetings and phone menu options revert back to the system default.
5. You can move a profile from one Auto Attendant to another and the profile keeps all the settings, including your recorded greetings.
Auto Attendant Setup

During the initial set-up, you will be asked to enter a name for your Auto Attendant. Click on **Continue** to setup your Auto Attendant schedule.

A wizard will guide you through the process of establishing your schedule.
Step 1. Time Zone

This is the time zone your Auto Attendant will use to determine scheduling rules. Your individual extensions may have the same or different time zone settings.

**To select a time zone:**
1. Click on the pull-down menu and select the time zone nearest your desired location.
2. Click **Next** to continue.

![Select Time Zone](image)

*Figure 3*
Step 2. Define Normal Business Hours

Business Hours represents the times and days for which your Auto Attendant will use the business hours greetings and rules. The default settings are for Monday through Friday, from 8:00 am until 5:00 pm.

To define business hours:

1. Select the days of the week by clicking the check box next to each day. A green check mark indicates that the day is included in the business hours schedule for the defined range of hours.

2. Define a range of hours. You must enter a value for both a start and an end time for each day that has been selected. The proper format for entering a time is either HOUR A/P (8a or 3p) or HH:MM:AM/PM (8:00am)

3. Click Next to continue or click Prev to return to time zone.

Note: Once you set your business hours, you will need to set up your phone menu options as well as record or upload a greeting before you can activate your Auto Attendant profile.
Step 3. Manage Business Hours Exceptions

Business Hours exceptions allow you to temporarily adjust your normal business hours schedule for a given date. This is useful if you sometimes have shorter working hours due to company events. For example, your normal business hours schedule is set from 8am to 5pm, but next Monday, your office will be out at a business conference until 2pm. You can set an exception for 2pm until 5pm—this will override your normal hours and allow the after-hours rules and greeting to be played until 2pm. After that, your normal schedules and rules will automatically be applied.

**Note:** To skip configuration, simply leave the fields blank and click on **Next**

**To define an exception:**
1. Select the date you want the exception to take place by clicking on the calendar icon or entering text. The format is MM/DD/YYYY.
2. Define a range of hours. You must enter a value for both a start and an end time for each date that has been selected. The proper format for entering a time is either HOUR A/P (8a or 3p) or HH:MM:AM/PM (8:00am)
3. Add additional exceptions, if needed, by clicking the [+ ] icon and following steps 1 and 2.
4. Remove unwanted exceptions by clicking the [- ] icon.
5. Click **Next** to continue or **Prev** to return to Business Hours.

![Manage Business Hours Exceptions](image)

**Figure 5**

**Note:** Once you set a Business Hours Exception, you will need to record or upload a greeting before you can activate your Auto Attendant profile.
Step 4. Manage Holidays

Holidays are special exceptions. For each date you define, the Auto Attendant will play your pre-recorded Holiday greeting and will apply Holiday rules. You will be able to define Holiday rules once you have at least one date set for a Holiday. You may add additional Holiday entries, but they will all share the same recording and rules. If you want a greeting that names the holiday, you would need to re-record the greeting prior to each holiday.

**Note:** To skip configuration, simply leave the fields blank and click on Next.

**To define a Holiday:**
1. Select the date for the Holiday by clicking on the calendar icon or entering text. The format is MM/DD/YYYY.
2. Add a description by typing in the description field.
3. Add additional Holidays, if needed, by clicking the [+ ] icon.
4. Remove unwanted Holidays by clicking the [- ] icon.
5. Click Next to continue or Prev to return to Business Hours Exceptions.

![Manage Holidays](image)

**Figure 6**

**Note:** Once you set a Holiday schedule, you will need to record or upload a greeting before you can activate your Auto Attendant profile.
Step 5. Verify and Save Settings

You are presented with a summary screen that displays your settings. If they are correct, you may click **Save Settings** to continue. Otherwise, click **Prev** to navigate back to the previous screens.
Once you have successfully saved your schedule settings, you will be presented with a confirmation screen with a choice to continue setting up the Auto Attendant profile (Continue Configuration) or to save the profile and continue the configuration at a later time (Done).

![Figure 8](image)

Phone Menu Configuration

After you have completed establishing your Auto Attendant Profile schedule, you can setup your phone menu settings (Manage Settings) and greeting settings (Manage Greetings). This is where you can configure and manage your phone menu and greetings.

![Figure 9](image)
Manage Settings

Manage Settings allows you to program the phone options and phone menu rules for a given schedule.

Phone Menu Options

Each phone menu option has a drop down selection of actions. In addition, you can program the Auto Attendant to respond if the caller does not press any key.

**Note:** Some of the pull-down options will require you to pre-configure the features first before making them available to your Auto Attendant. These features include Call Queue, Ring Groups, Extensions, Additional Auto Attendants and Voicemail boxes.

1. Plan out what you want your callers to be able to do with the phone menu options.
2. Select the phone menu number (0 – 9) you wish to activate.
3. Pick the action you want each of the number to correspond to.

![Figure 10](image)

Next, you can configure how your customers hear the phone menu greetings and if they can direct dial extensions.

![Figure 11](image)
Your options are:

**Number of times to replay greetings, if caller takes no action** – defines how many times the greeting will be played if the caller does not make any phone menu selection. You can select to have the menu cycle once, twice or three times.

**How many seconds should the system wait before each replay?** – define how long the system should wait before cycling through the menu again. You can select between 1 to 9 seconds delay.

**Do you want the caller to directly dial by an extension?** – allow users to interrupt the greeting by dialing an extension directly at any time. You have a Yes or No option.

**Manage Greetings**

This option allows you to record or upload pre-recorded greetings.

**Note:** You need to record greetings that match your phone menu selection so that what your customers will get when they call in corresponds with what you selected.

From the Manage Greetings section, you can view, listen and delete existing greetings, edit greeting names, select which greeting to play, upload a new greeting, and record new greetings.

![Figure 12](image)

**Figure 12**

**Note:** You can upload up to five greetings per phone menu options.
To select a greeting for your menu options:

- Click on the check box under Current Greetings.

**Note:** You can only select one greeting at a time.

To upload a new greeting:

1. Click on Upload Custom Greeting.
2. Click on Upload File.
3. Locate the file from your computer.
4. Click on Upload.
5. Check the Current Greeting box of the greeting you want to use.

**Note:** Supported audio files include .au, .wav, .mp3, and .vox. The file size should not be any larger than 5MB and should be saved on your computer. The ideal sampling rate is 8KHz at 8bit encoding.

To record a custom greeting:

1. Click on Record Custom Greeting.
2. Enter your ten-digit phone number.
3. Click Start Recording.
4. The system will ring the phone number you entered.
5. Pick up the phone and follow the Recording IVR instructions.
6. Once you are satisfied with your recording, you can hang up and click on Done.

**Note:** You need to set up your company main number before you can use this feature. We also recommend you use your Virtual Office phone service for the best recording quality. We currently do not support recordings from an international phone number.

To edit a greeting name:

1. Click on the edit icon next to each file name.
2. Enter the new file name.
3. Click the save icon.
Testing Your Profile

Once you have completed managing your greetings and your phone menu configurations, you can test your profile before pushing the profile live to your phone system.

1. On your top navigation bar, click on **Test Profile**.
2. Enter your phone number.
3. Click on the **Test Profile** button.
4. Pick up the call when your phone rings.
5. Press 1 to connect the call after the prompt.
6. You can steer through your Auto Attendant just like your callers would. When there are greetings missing, you will hear the following IVR:
   
   **Hello. This Auto Attendant menu has not been set up. We apologize for the inconvenience.**

7. Hang up after you are done testing your Auto Attendant.
8. Once your are ready to launch your profile live, you can set the profile as active. See instructions below.
Launching Live
After you have configured and tested your Auto Attendant profile to your satisfaction, you are now ready to activate your profile.

**Note:** Be sure that you click on **Save Settings** in the **Manage Settings** page to save your profile.

1. Navigate to the Profiles page by clicking on **Manage Profiles** on the top navigation bar.

![Figure 15](image1)

2. Go to the profile you wish to activate and click on **Set as Active Profile**. This will launch your Auto Attendant schedule, phone menu configurations and greetings to your phone system.

![Figure 16](image2)

3. Your Auto Attendant is now live.

4. You can call into your Auto Attendant Extension or phone number to access your handywork!

**Note:** You will not be able to activate your profile until you have uploaded or recorded all your greetings.
Auto Attendant Management

You may find it necessary to change your Auto Attendant from time to time. This is done by logging in to your 8x8 Self Service Portal at https://myaccount.8x8.com/

From here you will first be presented with an account summary table, where you will click on Configure AA.

![Figure 17](image)
Profile Management

Once you click on **Configure AA**, you will be navigated to the Auto Attendant home page. This screen displays helpful information like the creation date, last modified date and the current status of the Auto Attendants and their profiles.

> Tip
You can have up to five inactive profiles per Auto Attendant.
The Auto Attendant home page allows you to:

1. Create/edit profile
2. Activate
3. Deactivate profile
4. Copy profile
5. Delete profile
6. Move profile

Create/Edit a Profile
To create a new profile, click on the Create New Profile link.

To edit a profile, click on the Edit link.

To rename a profile, click on the pencil icon next to the profile name.

Activate Profile
By selecting Set as Active Profile, you publish the profile and its configurations live to that particular Auto Attendant.

This will override any existing active profile on the Auto Attendant. Only inactive profiles will have the Set as Active Profile link.
Deactivate Profile
To deactivate an active profile and revert back to the system default profile, you need to click on **Deactivate Profile**. By clicking on this link, you will deactivate the current active profile and the system default phone menu and greetings will be played on your Auto Attendant. See **System Default Profile** on page 5 for more details.

For example, if you discover that your current active profile has wrong greetings or options, you can deactivate it and restore the system default profile while you make changes to your customized Auto Attendant profile.

**Figure 21**

**Note:** You can activate a profile without deactivating the existing active profile.

Copy Profile
This feature allows you to copy an existing profile for editing, or to move it to another Auto Attendant. For example, you might want to create a similar Auto Attendant profile for your Los Angeles office as your New York office.

1. Make a copy of the profile by clicking on the **Copy** link

**Figure 22**
2. Confirm your copy selection
3. You will see a copy of the active profile made
4. You can click on the **Move** link to move the copy to your Los Angeles Auto Attendant

**Note:** Currently, the copy function does not copy over your greetings. You will need to re-record or re-upload your greetings for the copy.

**Delete Profile**
You can delete any profile by clicking on the **Delete** link. When you delete an active profile, you permanently remove the configuration and greetings of that profile and restore the system default configuration on your Auto Attendant.

Since you need at least one profile on your Auto Attendant, you will not be able to delete the last profile.
Move Profile

Moving a profile allows you to move a profile from one Auto Attendant to another. When you move a profile, you move the phone menu configurations and greetings as well. To move a profile:

1. Click on the **Move** link
2. Select the Auto Attendant you want to move your profile to. The pulldown menu lists your Auto Attendants by name and extension numbers
3. Click on the **Move Profile** button
Auto Attendant—Navigation Tree

The navigation tree below allows you to directly access different sections of the configuration process. You can expand and collapse the folders by clicking on them. Clicking "+" will expand a tree and clicking "-" will collapse a tree. You may click on the specific item you wish to configure and the right side of your computer screen will show the settings for the section clicked. You can now edit the section.

![Navigation Tree Image]

**Figure 25**

Sections of the navigation include:

1. **Manage Schedule**
   a. **Time Zone** – Used to define the time zone for your Auto Attendant, independent of other extensions within your system
   b. **Business Hours** – Define business hours schedule and rules
   c. **Business Hours exceptions** – Optional settings to temporarily modify your normal schedules
   d. **Holidays** – Optional, pre-define dates for special rules to be used
2. **Business Hours Rules** - Define call routing and IVR behavior

3. **After-Hours Rules** - Define after-hours call routing and IVR behavior

4. **Holiday Rules** - Only available if a holiday has been defined

Managing Additional Auto Attendants

Many customers prefer the convenience of having several independent auto attendants. For example, you may want to have a separate auto attendant for each office location.

In the example below: four auto attendants have been purchased, one for each of four locations. Two have been configured, “Primary Company Auto Attendant” and “New York City Office” auto attendants. The other two auto attendants are not configured, and can be configured later.
Resources

To find the latest user guides and tools for your 8x8 Virtual Office service, please log in to your account at: http://www.8x8.com/login.

To access online user documents, go to www.8x8.com/Support.aspx

For Customer Service please contact:

By Phone:

**Toll free:** 1.888.898.8733

**Outside of the US:** 1.408.687.4120