8x8 Virtual Office
Phone System Setup Guide

Version 1.1, October 2011
Introduction

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

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

- Configuring and managing extensions
- Managing Virtual Office Online user profiles
- Managing phone system features such as the Auto Attendant, Ring Groups, Music-on-Hold, and more
- Transferring phone numbers to 8x8 service
- Updating your payment methods
- Checking order status
- Opening and tracking support cases
System Requirements

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

Required Plug-ins
- Flash Player 10.0 or higher

Supported Browsers

<table>
<thead>
<tr>
<th>Microsoft Windows Environment</th>
<th>Mac OS Environment</th>
<th>Linux Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Firefox 3.0 and higher</td>
<td>• Firefox 3.5 and higher</td>
<td>• Firefox 3.0 and higher</td>
</tr>
<tr>
<td>• Google Chrome 1.0 and higher</td>
<td>• Google Chrome 1.0 and higher</td>
<td>• Google Chrome 1.0 and higher</td>
</tr>
<tr>
<td>• Internet Explorer 7.0 and higher</td>
<td>• Safari 3.0 and higher</td>
<td>• Opera 9.5 and higher</td>
</tr>
<tr>
<td>• Opera 9.5 and higher</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Safari 4.0 and higher</td>
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</tr>
</tbody>
</table>

Required Firewall Ports

Firewall Ports to be Open
- 80 TCP (http)
- 443 TCP (https)

Minimum System Requirements

<table>
<thead>
<tr>
<th>Windows XP</th>
<th>Windows 7 and Vista</th>
<th>Mac</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Pentium 4 1.3 GHz / AMD Athlon XP 1500+ or newer</td>
<td>• Pentium 4 1.3 GHz / AMD Athlon XP 1500+ or newer</td>
<td>• Powercomputer G4/G5 or newer</td>
</tr>
<tr>
<td>• 512 MB of RAM</td>
<td>• 1 GB of RAM</td>
<td>• 512 MB of RAM</td>
</tr>
</tbody>
</table>

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

2. Click Sign-In.
3. Select Account Manager.
4. Enter your 8x8 login and password.
Account Manager Home Page

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

The home page provides a snapshot of your Virtual Office system. At a glance you can see the status of different tasks and select various options.
Call Logs
Displays the number of incoming and outgoing calls based on the selected interval.

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

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

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

Account Updates

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

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

8x8 Network Alerts displays information about any 8x8 system or network updates.
How Do I?

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

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

Configuring Your 8x8 Phone Service

Most systems can be set up in 3 steps:

1. Phone System Setup
   - Initiating number transfer
   - Activating phones
   - Configuring extensions and creating User Profiles

2. Routing Calls
   - Creating Ring Groups
   - Editing Virtual and Toll-Free Numbers (add-on option)
   - Setting up the Auto Attendant

3. Additional Features
   - Selecting your music and message on hold options

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

Number Transfer

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

To request a number transfer:

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

2. Under the **Phone System** menu on the left, click **Number Transfer**. You are now on the Number Transfer main page.

3. Click **Print Number Transfer Checklist** and review instructions to ensure you have all required information ready before you start the number transfer process.

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

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

6. Click **Continue**.
7. Enter the number of service locations for the phone numbers.
   To continue, click **Next**.

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

8. Enter the service address and service provider information for the number you want to transfer.
   To continue, click **Next**.
9. Enter or cut and paste the numbers you want to transfer.
   **Note:** you must separate the numbers with commas, tabs or line breaks.
   
   To continue, click **Next**.

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

11. Review the information you provided to ensure it is correct. To edit any of the information, click **Back**.
   
   To continue, click **Next**.
12. Review the Letter of Authorization carefully. We recommend you print it for your records using the provided button. If you agree to all terms in the letter, click I Agree.

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

Configuring Extensions

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

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

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

1. Click **Phone System** on the top navigation bar.
2. Under **Manage Extensions**, click **Edit Multiple Extensions**.
3. Using the gray navigation bar, configure the following options for all extensions, as desired:
   - Caller ID First Name
   - Caller ID Last Name
   - Voicemail Password
   - Enter Voicemail-to-Email address individually. (Note: voicemail email notifications will be sent to this address.)
• Hide in Auto Attendant
• Make International Calls
• Allow Social Networking
• Music on Hold
• Display Number for Outgoing Calls
• Time Zone
• E911 Service Address

4. After entering a name or password, click the checkbox to apply the change to the entire column.

5. Click Save to apply your changes.

Note: There are additional extension features that can be configured by the phone administrator or by the individual extension user. Review the Virtual Office Online User Profile Section for more information.

Edit Individual Extensions

Selecting and editing individual extensions is available through Manage Extensions.

1. Click Phone System on the top navigation bar.

2. From the Phone System home page, under Manage Extensions, click the Edit link next to the extension you want to edit.
3. You are now on the **Edit Extensions** landing page. Use the Expand and Collapse icons to view and edit the following panes:

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

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

4. Once you are finished with your edits, click **Save Changes**.
Extension Information

The Extension Information pane lets you quickly enable or disable a number of features for a specific extension, including Caller ID display, International Calling, and E911 Service.

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

![Extension Information Pane]

2. Enter, select or deselect these options for individual extensions:
   - Caller ID First Name
   - Caller ID Last Name
   - Time Zone
   - E911
   - Allow International Calls
   - Hide in Auto Attendant Directory
   - Allow Music On Hold Selection
   - Allow Social Networking
   - Enable Inbound Caller ID
   - Permanent Caller ID Blocking
   - Display Number for Outgoing Calls

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

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

You can update the following items:

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

User Profiles is the method of assigning an end user, a person or department, to a specific extension. This allows phone system administrators to identify extensions by name. A **User Profile**, a **Username** and **Password** must be created in order for an extension user to access their extension management system in **Virtual Office Online**, including Advanced Call Forwarding, Extension Preferences, and Softphone. Phone system administrators still have the ability to control which functions extension users can access.

If you as the phone administrator want to create the user’s username and password for them, proceed to the Virtual Office Online User Profile pane.

1. Click the Expand button to display the Virtual Office Online User Profile pane.

   - You have two options for assigning a **User Profile** to an extension:

   **Option One**

   To associate an **existing profile** to an extension:

   1. Click the **User Profile** drop-down arrow.
   2. Select a profile from the list.
   3. Enter a password (if you want to change the password associated with that profile).
   4. Confirm the password and click **Save Changes** at the bottom of the page.
Option Two

To create and associate a new profile to an extension:

1. Click the User Profile drop-down arrow.
2. Scroll to the bottom of the list.
3. Select {Add New User ID}.
4. Enter the following information in the appropriate fields:
   - Username
   - First Name
   - Last Name
   - Email
   - Password
   - Confirm Password
   - Pass Phrase
   
   Note: Pass Phrase is a security requirement for accessing call history or billing information over the phone.
5. Click Save Changes at the bottom of the screen.

Creating and Editing Profiles in User Profiles

You can view your User Profiles, see status of User Profile Setup or create and edit your User Profiles two ways:

Option One

1. Click Phone System on the top navigation bar.
2. Under Phone System menu on the left, click on User Profiles.
Option Two

1. Click the **Phone System Setup** box on the left side of the window.

2. Click **Manage** in the **Virtual Office Online Profiles** box.
3. To notify a user to set up their user profile in Virtual Office Online:
   - Locate the user’s name/phone number and click Quick Setup.

   - When the Quick Setup form appears, fill in the required details.
   - Click Send Email to send an email telling the user how to set up their Virtual Office Online user profile.

4. To edit a user profile:
   - Locate the user’s name/phone number and click Edit.
• Enter your changes.

• Click Save

5. To clear a user profile:

• Locate the user’s name/phone number and click Clear.

Note: The user will no longer be able to manage their phone features using Virtual Office Online.
Virtual Office Pro Information

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

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

2. Click **Save Changes** at the bottom of the screen.
Call Forwarding

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

<table>
<thead>
<tr>
<th>Order Index</th>
<th>Forward Type</th>
<th>Forward to Auto Attendant</th>
<th>Forward to Voicemail</th>
<th>Forward to One Number Access</th>
<th>Forward to External or Extension</th>
<th>Phone Number</th>
<th>Delay (Seconds)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Always Forward</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Busy Forward</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>No Answer Forward</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Internet Outage Forward</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15</td>
</tr>
</tbody>
</table>

**Phone System Administrator Call Forwarding Basic Setup**

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

- **Forward to Auto Attendant**: calls are answered by the Auto Attendant. Callers can select from available options, such as "press 1 to leave a message; press 0 to reach an operator."
- **Forward to Voicemail**: callers are forwarded to voicemail, where they will hear a greeting and/or be able to leave a message.
- **Forward to One Number Access (ONA)**: calls can be forwarded to one or up to four destinations either sequentially or simultaneously. If a call is not answered at any of the target destinations, it will then be forwarded to voicemail.
- **Forward to External Number or Internal Extension**: when you select this option, a field appears in the Phone Number column where you can enter the number you would like the calls forwarded to.
• **Sequential and Simultaneous Ring Distribution:** This sets how your forwarded calls will be distributed through your phone system. The “sequential” option rings selected phones one at a time based on the order you have listed. You can set the number of seconds the system will ring each phone. The “simultaneous” option rings all your selected phones at the same time.

• **Call Screening:** When call screening is enabled, the caller must record his/her name before the 8x8 system tries to locate you. You will then be able to listen to the name and have the option to answer the call or not. If you decline, the call will go to voicemail.

1. Select the desired options for these call forwarding conditions:
   - **Always Forward**
     
     **Note:** if you select **Always Forward**, all other forwarding options will be disabled. To re-enable them, deselect this option.

   - **Busy Forward**
   - **No Answer Forward**
     
     **Note:** you can also select a delay time, in seconds, for this feature. The default is 15 seconds.

   - **Internet Outage Forward**

2. If you select **One Number Access**:
   - Select whether the Ring Distribution will be **Sequential** or **Simultaneous**.
   - Select whether Call Screening will be **Disabled** or **Enabled**.
   - Enter the first number where your calls will be forwarded
     
     **Note:** The number could be a phone number, extension number, ring group number, call queue number etc.

   - Click the **Add** button to enter more phone numbers.

   - Select the **Voicemail Password Required** checkbox if you want to ensure that only you can answer forwarded calls at the target destinations
     
     **Note:** selecting this option means you must enter your voicemail password before you can answer the call.

   - Enter the number of seconds the phone will ring before forwarding to the next destination or to voicemail. The default is 20 seconds.
Extension User Call Forwarding Basic Setup

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

Revert to Basic Call Forwarding: Deletes the user’s rules and allows you to set up basic call forwarding by following the steps in the Call Forwarding section.
Manage Call Forwarding: Allows you to log in as the user and manage rules using the advanced options in Virtual Office Online. See the Virtual Office Online User Guide for more information.

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

Click the Phone System icon to return to the Phone System Setup page.
Call Routing

Ring Groups

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

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

This takes you to the Ring Group main page.

Create Ring Groups

1. Click Create Ring Group.
2. Enter a **Ring Group Name** and select a **Ring Group Extension**.

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

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

2. On the Edit Ring Group page, under Ring Group Extensions:
   - Click the drop-down arrow to select an extension number.
   - Click the + and - buttons to add and delete extensions.
3. To change the order in which incoming calls are routed, use the list order field:
   - Enter a number in the List Order field next to each extension. The number entered is the chronological order that the call will be routed to each extension.
   - Click Update List Order.

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

5. Click Save at the bottom of the page.

Click the Phone System icon to return to the Phone System Setup page.
Virtual and Toll-Free Numbers

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

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

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

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

2. Click the Destination drop-down arrow to select a new destination.
3. Enter or select any changes to the service address in the appropriate fields.
   
   **Note:** Fields marked with * must be filled in.

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

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

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

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

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

By creating multiple profiles for Auto Attendant, your company can quickly switch between greetings based on time, day of week or date.

1. Click Create Auto Attendant Profile

2. Review the Auto Attendant Profile Overview, and complete the Auto Attendant worksheet.

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

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

Normal Business Hours

What hours is your business open?

<table>
<thead>
<tr>
<th>Day</th>
<th>Open Time</th>
<th>Close Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tuesday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wednesday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thursday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Saturday</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Business Hours Rules and Greeting

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

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

Business Hours Greeting Example:

Enter your script here:


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

Rules Example:

<table>
<thead>
<tr>
<th>Press</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Technical Support</td>
<td>Transfer to Ring Group</td>
</tr>
<tr>
<td>2</td>
<td>Sales</td>
<td>Transfer to Ring Group</td>
</tr>
<tr>
<td>3</td>
<td>Finance</td>
<td>Transfer to Sub Menu</td>
</tr>
<tr>
<td>4</td>
<td>Dial by Name</td>
<td>Dial by Name</td>
</tr>
<tr>
<td>5</td>
<td>Corporate Directory</td>
<td>Corporate Directory</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>Operator</td>
<td>Transfer to Extension</td>
</tr>
</tbody>
</table>

1
3. Click **Continue**

**FYI:**

**About Auto Attendant Profiles**

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

**Why Create More Than One Profile?**

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

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

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

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

![Create Auto Attendant Profile](image)
5. Choose whether you want to define your business hours or have the same greetings and rules all day, every day (24/7).

6. Click Next.
   
   If you chose Define Business Hours skip to Define Business Hours section
   
   If you chose 24/7 Business Hours proceed to Step 7

7. 24/7 Business Hours:
   
   • Enter your phone menu rules.
   
   • Under Press, click the drop-down arrow and select a key.
   
   • Enter a description of the function that key will enable.
   
   • Under Call Routing, click the drop-down arrow and select a function for the key you selected.

   • Click the + and - buttons to add and delete key settings.
8. When you have finished configuring all your phone menu rules, click Create Profile.
9. When the dialog box appears confirming that you successfully created your profile, click OK.

10. To upload and record greetings for your profile skip to the Upload a Greeting and Record Your Own Greeting sections.

Define Business Hours

Business hours allows you to have separate greetings for normal business hours, non-business hours, lunch hour and holidays etc.

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

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

Click Next.

- Enter your phone menu rules for business hours.
- Under Press, click the drop-down arrow and select a key.
- Enter a description of the function that key will enable.
- Under Call Routing, click the drop-down arrow and select a function for the key you selected.

- Click the + and - buttons to add and delete key settings.
- Click Next.
2. Enter your phone menu rules for after hours, using the sub-steps outlined in step 1 above. Then click **Create Profile**.

3. When the dialog box appears confirming that you successfully created your profile, click **OK**.

**Upload a Greeting**

1. To upload and record greetings for your profile, return to the main **Auto Attendant** page and locate the profile you created in the list. Click **Edit**.
2. Click the icon to expand the Business Hours Rules and Greetings pane.

3. Go to the Greetings area. Choose if you want to upload a previously recorded greeting or record a new greeting directly into your phone system. To have your greetings professionally recorded go to the 8x8 Audio Production Store at www.8x8.com. Click the Resources tab and then Audio Production.
To upload a greeting, proceed to Step 4. To record a new greeting skip to Record Your Own Greeting.

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

- Click Upload Greeting

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

- Check the Set This Greeting as Active box
- 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 Your Own Greeting

• Draft a script to follow while you are recording in the Greeting Script box provided, (optional).
• Click Print Greeting Script to have a hard copy of the script available while you are recording, (optional).
• Click Record Greeting

• Enter your 10-digit phone number and click Start Recording

• 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 message.

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

Create **After Hours Rules and Greetings**.

1. Click the icon to expand the **After Hours Rules and Greetings** pane.
2. Upload or record a greeting following the steps outlined in Record Your Own Greeting or Upload a Greeting sections.
3. Return to the main Auto Attendant page.
4. Locate the profile you created and edited in the list.
5. Click Turn On to activate your profile.

You have successfully configured your Auto Attendant.

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

**Additional Features**

**Music and Message on Hold**

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

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

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

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

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

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

4. Click **Save**.
Allowing Extension User Access

1. In order for extension users to access Music/Message On Hold in Virtual Office Online, you must check the Music on Hold box in their extension configuration settings. See the Extension Configuration section.

2. Check the Extension User Access box(es) to give users the choice of selecting that file.

3. Click Save.

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

Account Manager Privileges and Roles

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

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

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

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

1. Click **Privileges** on the top navigation bar.

2. To copy another administrator’s privileges for the new administrator, click **Copy**. To select the new administrator’s privileges manually, click **Add New Admin**.

3. Select whether you want to give permission to an **Existing User** of your phone system, or a **New User**.
4. Select the administrative privileges for the user. By clicking on a link, like **Phone System Service**, more options specific to that function becomes available.
5. If you have multiple PBXs, select which PBX these administrative privileges will apply to.

6. Click **Add**

7. When the dialog box appears confirming that the new administrator has been added, click **OK**.

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