8x8, Inc.

8x8 Virtual Contact Center

Account Manager Guide – Channel Rerouting

Revision 1.0

The Champion
For Business
Communications

Contents

Introduction

The online 8x8 Account Manager is the simple way for system administrators to manage their 8x8 accounts online.

This supplemental guide is an overview of the Virtual Contact Center administrative tools in the 8x8 Account Manager. **For instructions on other features of the 8x8 Account Manager, see the 8x8 Virtual Office Account Manager Guide available at www.8x8.com/welcome.**
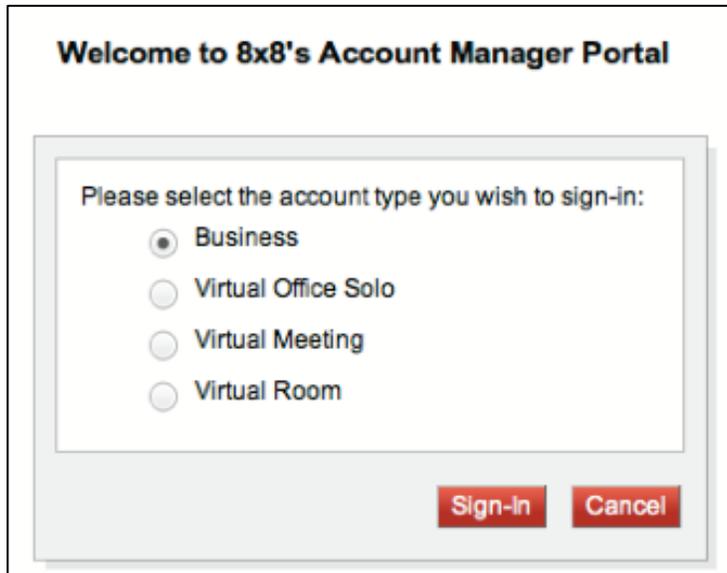
Login Procedure

To log into Account Manager:

1. Go to http://www.8x8.com.
2. Click **Sign-In** at the top of your screen.
3. Select Account Manager.

4. Enter your 8x8 username and password.

5. Click **Login**.
6. Select your account-type. Choose **Business** for Virtual Contact Center and Virtual Office Phone Service.

Note: If you have only one account type you will not see this screen. You will go directly to the Account Manager home page.

The Account Manager launches. Your Account Manager interface is customized to your service type with 8x8. For VCC customers, Account Manager offers the ability to:

- View calling plan options and set up Channel Rerouting using the **Contact Center** tab
- View billing statements and set up a billing profile using the **Billing** tab
- Add user profiles and additional administrators with privileges to manage Account Manager configuration using **My Account** tab
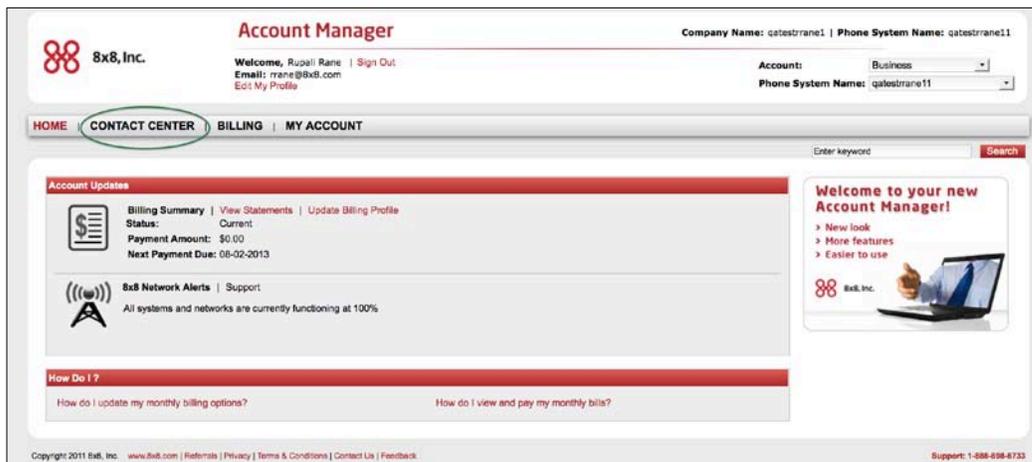
Contact Center Calling Plans

View the contact center calling plans you have subscribed to under the **Contact Center** tab.

To view your calling plans:

1. Select the **Contact Center** tab from the main menu.

2. Select **Contact Center Calling Plans** from the navigation menu.

Channel Rerouting - Overview

Channel Rerouting gives you the ability to divert your contact center inbound traffic to an alternate phone number or a secondary tenant should the need arise. Whether you just want more flexibility in everyday call routing, or you'd like to plan for business continuity, you can make these changes yourself from Account Manager, whenever it's convenient for you and your business. You can set up a contingency plan for your contact center, test the plan ahead of time, and activate it instantly when you need it. With a few clicks, your contact center traffic automatically gets re-routed without the need to contact 8x8 Support, making sure it's business as usual.

Features

- Ability to maintain business continuity
- Geographically distributed data centers
- Ability to define and validate channel rerouting plans in advance
- Ability to quickly switch and self manage routing plans
- Ability to archive routing plans
- Access and restore a historical version of a routing plan

Channel Rerouting Options

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

- **Companion Disaster Recovery Tenant**: Subscribe to Disaster Recovery Companion Service, which provides access to a secondary tenant. This is an add-on service that can be purchased separately.

  > **Important**: The Companion Disaster Recovery Tenant requires prior configuration.

- **Forward Calls**: Route your contact center inbound calls to an alternate phone number.

Setting up Channel Rerouting

Virtual Contact Center facilitates channel 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 disaster recovery tenant or forward them to another phone number. Virtual Contact Center allows you to define:

- **Normal Routing Plan**: Determines call routing during normal business operation.
- **Disaster Recovery Plan**: Determines call routing during a disaster.
- **Alternate Routing Plan**: Allows you to test the set up channel rerouting, validate routing options, and copy the validated plan to normal or disaster plan.

By default, all the routing plans are set to direct inbound traffic to the primary tenant.

Setting up Routing Plans

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. We recommend the following workflow for setting up Channel Rerouting:

STEP 1: Create a new version of an Alternate Routing Plan with desired routing options for channels.

STEP 2: Activate the Alternate Routing Plan and test it.

STEP 3: Copy the validated version of the Alternate Routing Plan to either Normal Routing Plan or Disaster Recovery Plan.
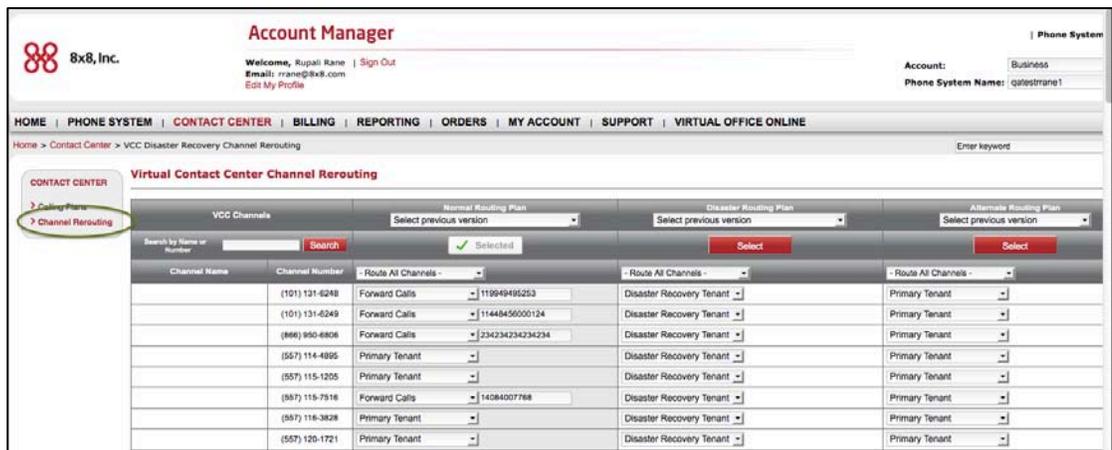
By following this workflow, you can be assured your Disaster Recovery plan is ready for activation when you need it.

STEP 1: Create an Alternate Routing Plan

1. Log into Account Manager. Click the **Contact Center** option from the navigation bar.
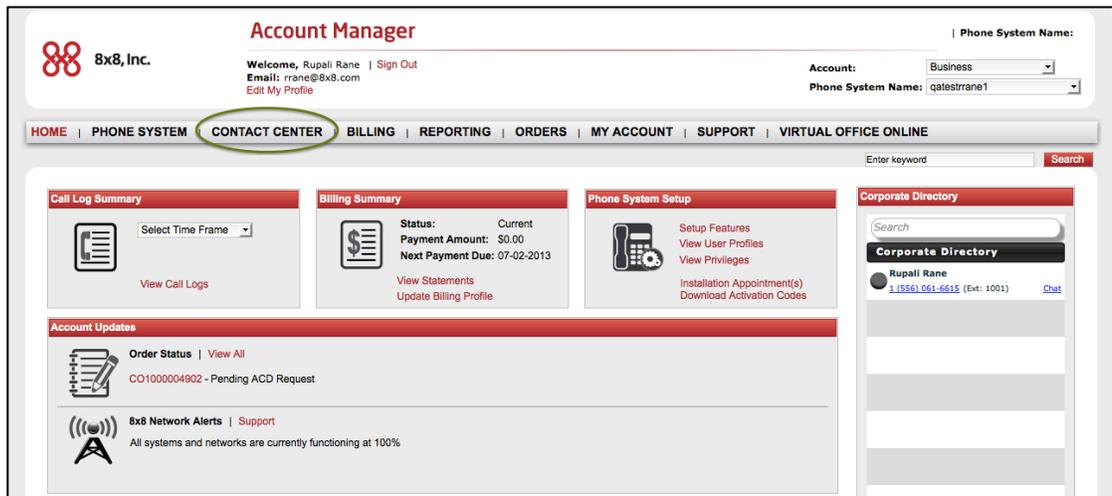

2. From the navigation menu, select **Channel Rerouting** to view the Virtual Contact Center Channels and routing plans.

3. Select a channel and specify a routing option under the Alternate Routing Plan from the available choices:

   o **Primary Tenant**: forwards all traffic to the channels in the primary tenant.
   o **Disaster Recovery Tenant**: forwards all traffic to a dedicated disaster recovery tenant.

   > **Important**: Disaster Recovery Tenant is limited to tenants with 8x8 Disaster Recovery Service.

   o **Forward Calls**: Forwards inbound traffic to a specified phone number. Enter a valid phone number.

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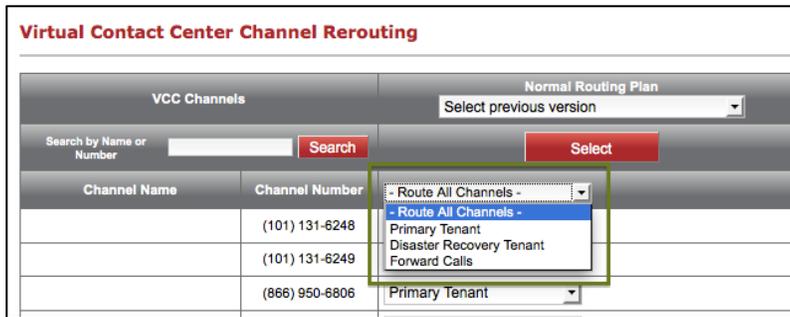

5. Click **Save Changes**. You are prompted to save with comments.
6. Enter a brief note to indicate the changes you made.

   Saving takes a snapshot of the settings in the Alternate Routing Plan column. For details refer to Saving Routing Plans.

STEP 2: Activate the Alternate Routing Plan

Changes to your routing plan take effect upon activating the plan. To activate a routing plan, click the **Select** button 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 back to a plan any time.

7. Click the **SELECT** button to activate the Alternate Routing Plan.
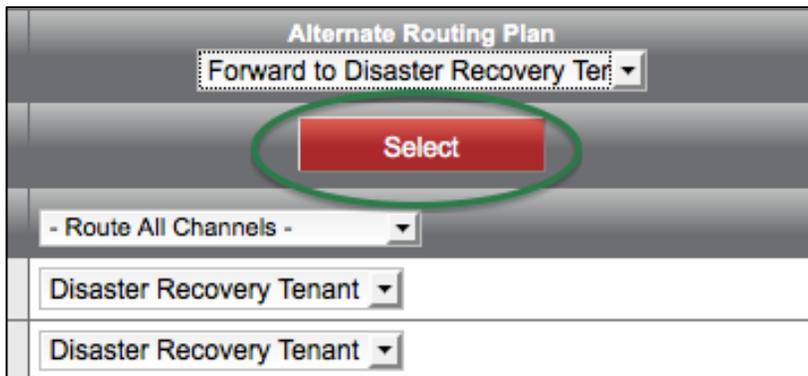
8. Test if the calls are routed as intended.
9. If the plan operates successfully, you are now ready to copy the plan to the **Normal Routing Plan** or the **Disaster Routing Plan**.

STEP 3: Copy the Tested Plan

10. From the drop down menu under Disaster Routing Plan or Normal Routing Plan, select the Alternate Routing Plan you just validated.
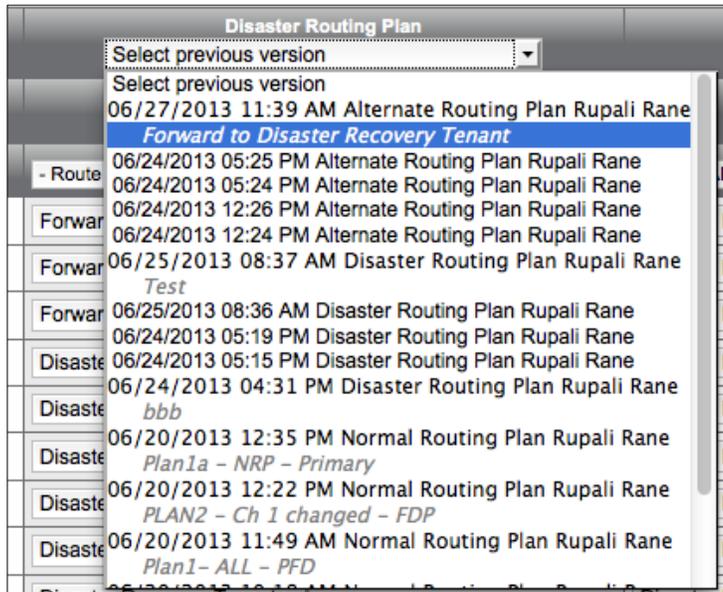
11. Refer to the comments to make sure you are copying the right version.
12. The copy action highlights the channels with changed settings.
13. Click **Save Changes**.

> **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.

Saving Routing Plans

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. So, you can copy the settings from a column by selecting the desired version specific to the plan.

Additional Features

In addition to Channel Rerouting, you can also manage privileges and view your bills in Account Manager.

Granting Privileges

This feature allows you to share the configuration privileges of Account Manager with multiple administrators. VCC customers should note the privileges allow you to control Account Manager functionality, not the Configuration Manager. You can create a new administrator and grant the ability to manage channel rerouting, billing, and to create and edit user profiles.

For information on Privileges, refer to the Account Manager Guide at **www.8x8.com/welcome**.

Viewing Billing

Access to 8x8 service bills online through Account Manager saves your time to get on 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.

For information on Billing, refer to the Account Manager Guide at **www.8x8.com/welcome**.