Effective May 10, 2013, the Privileges tab in the top navigation bar of the Account Manager was renamed My Account. Privileges and User Profiles can now be found in the My Account tab.
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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:

- Creating and editing User Profiles
- Assigning users, configuring and managing extensions
- 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
Virtual Office Account Manager
Phone System Setup Guide

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

Microsoft Windows Environment
- Firefox 3.0 and higher
- Google Chrome 1.0 and higher
- Internet Explorer 7.0 and higher
- Opera 9.5 and higher
- Safari 4.0 and higher

Mac OS Environment
- Firefox 3.5 and higher
- Google Chrome 1.0 and higher
- Safari 3.0 and higher

Linux Environment
- Firefox 3.0 and higher
- Google Chrome 1.0 and higher
- Opera 9.5 and higher

Required Firewall Ports

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

Minimum System Requirements

Windows XP
- Pentium 4 1.3 GHz / AMD Athlon XP 1500+ or newer
- 512 MB of RAM

Windows 7 and Vista
- Pentium 4 1.3 GHz / AMD Athlon XP 1500+ or newer
- 1 GB of RAM

Mac
- Powercomputer G4/G5 or newer
- 512 MB of RAM

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 bill?</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 and creating User Profiles
   - Assigning users, and configuring extensions

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.

User Profiles

A User Profile is required to give a user access to your 8x8 system. A User Profile must be created before assigning a user to an extension or granting administrative privileges to your Account Manager.

You only need to create one User Profile per individual. A User Profile can be assigned to multiple extensions or features. It is important that a user’s profile remains current, especially the user’s email address. The following User Profile fields are mandatory:

- First Name
- Last Name
- Email Address
- Username

**Note:** When creating a new User Profile, by default the Username is the email address. The system administrator has the flexibility to change the Username to something other than the email address.

In addition to the above mandatory fields, the following fields are available and can be used or not used at the phone system administrator’s discretion:

- Nickname- When this field is used, the nickname replaces the first name
- Job Title
- Department
- Location
- 3 customizable fields
Virtual Office Account Manager

Phone System Setup Guide

Using the User Profile Configuration Tool

1. Click My Account on the top navigation bar.
2. Click User Profiles
3. To hide or unhide available User Profile fields in the User Profile chart, click Edit Viewable/Hidden Fields
4. Check or uncheck the fields to display
5. Click Save

Customizable Fields

Phone system administrators can create up to three customizable fields.

To use the customizable field(s):

- Click Edit Viewable/Hidden Fields
- Check the box next to a Custom Field
- Name the field by typing in the adjacent Header Label box
- Click Save

Create and Edit User Profiles

You can create User Profiles one at a time or in bulk.

To create an individual User Profile:

1. Click Create New User Profile
2. Enter user information. Mandatory fields are: First Name, Last Name, Email Address and User Name (by default User Name is email address).
3. Click Save
   
   Note: For phone extensions that will not be assigned to a specific individual but instead will be located in a specific area like the front lobby, conference room, etc., create a User Profile for each area. Example: Enter “Front” as a First Name and “Lobby” as the Last Name, and enter the email address for the person responsible for maintaining the extension settings (usually the Primary System Administrator)

To edit a User Profile, click Edit in the Action Column for the User Profile you want to edit.

To create or edit multiple User Profiles:

1. Click Download CSV Template
   
   Note: If using customizable fields, before downloading the template make sure that you have labeled the field by following the Customizable Fields instructions above.

2. Download and open the file
3. Enter information for new User Profiles or edit information for current profiles.
   
   Important: Do not make any changes to the 8x8 Internal ID column
4. Once you have made all your changes save the file to your computer hard drive
5. On the **User Profile** page click **Upload CSV Template**, then **Proceed**

6. Click **Add**, then locate the file you just saved and click **Open**, then **Upload**

7. Verify that the new information is correct and then click **Submit**

**Disabling a User Profile**

To disable a User Profile click **Disable** in the **Action Column**. Disabling a User Profile will remove the profile from all extensions or features the User Profile has been assigned to. (Caution: Once a User Profile has been disabled you can enable it once again. However, you will manually have to 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.

**Assigning a User to an Extension**

If you have not already installed and activated your phones, please see the Preparing Your Network and Installing Your Phones guide. To assign a user to an extension, you must first create a User Profile. Once the User Profile is created:

1. Click **Phone System** on the top navigation bar
2. From the Phone System home page click **View All Extensions**
3. Click the **Edit** link next to the extension you want to edit
4. You are now on the **Edit Extensions** landing page. Use the **Expand** and **Collapse** icons to view and edit the Extension Information pane
5. Click **Select User Profile** link
6. Click the **Select** link next to the User Profile you want to assign to the extension
7. You can continue to configure the extension using the **Configure Individual Extension** directions below or click **Save** at the bottom of the page to update user profile assignment.

To remove a User Profile from an extension, click **Clear User Profile**. Clearing a User Profile will reset the extension back to the default unassigned state. **Note:** clearing a User Profile only removes the user from the extension and the User Profile will still be active and available to other features that it is assigned to. To disable a User Profile and to remove it from all your system features, see “Disabling a User Profile” on page **16** in the User Profile section of this guide.
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>External Caller ID First Name</td>
<td>Name displayed for outgoing calls</td>
</tr>
<tr>
<td>External 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 Individual Extensions

Selecting and editing individual extensions is available through Manage Extensions.

Once you have selected a User Profile for an extension, you can continue configuring the extension using the steps below.

Use the Expand and Collapse icons to view and edit the following panes:

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

**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.

Enabling/Disabling Virtual Office Online

By default Virtual Office Online is enabled for all unlimited, global and metered Virtual Office extensions. Virtual Office Online and Virtual Office Desktop are web-based tools that allow extension users to manage and use their phone features online, including accessing the corporate directory and call forwarding settings, from any computer. A username and password is required to log into these features.
Extension Information

The Extension Information pane lets you assign a User Profile to an extension, enable or disable Virtual Office Online and edit extension caller ID settings.

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

2. Enter, select or deselect these options for individual extensions:
   - Assign User Profiles
   - Extension Caller ID Phone Number
   - External Caller ID First Name
   - External Caller ID Last Name
   - Time Zone

3. Click Save Changes at the bottom of the screen.
Extension Settings

In this pane, you can configure extension settings including time zone, e911 service address and calling options.

1. Use the Expand icon to display the Extension Settings pane
2. Enter, select, or deselect the following:
   - Time Zone
   - Preferred Codec
   - E911 Service Address
   - 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 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.

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.

Once you are finished with your edits, click Save Changes.

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

**Email Notification to Extension Users**

Once you assign a user to an extension, an email is automatically sent to the user with information regarding their new extension.

• **First-time extension users** with Virtual Office Online enabled also receive instructions for creating their login password.

• **First-time extension users** who do not have Virtual Office Online enabled receive an email alert but are not instructed to create a password. (Admins have the option to disable access to Virtual Office Online.)

• **Existing extension users** who already have a username and password to your PBX should use their existing credentials to log into the new extension.
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.

![Ring Group Example Image]
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. Callers are able to self-direct their call by choosing menu options. 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 menu recordings. 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 recordings and menu options based on different scenarios.

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

<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>
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<tr>
<td>Wednesday</td>
<td></td>
<td></td>
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<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:

Thank you for calling Acme Corporation. For Technical Support, press 1. For Sales, press 2. For Finance, press 3. To Dial by Name press 4 or for the Corporate Directory, press 5 or to speak with the Operator, press 0.

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>
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<td>Operator</td>
<td>Transfer to Extension</td>
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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 phone menu options, business schedules, and recordings to create a complete set of instructions for your auto attendant. Within one profile, you can specify options 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:

- Stage and test new recordings, 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 recordings, 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
5. Choose whether you want to define your business hours or have the same phone menus and recordings all day, every day (24/7).
   - If you chose Define Business Hours skip to Define Business Hours section
   - If you chose 24/7 Business Hours click Next and proceed to Step 6

24/7 Business Hours:

6. 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 + button to add additional options for this menu or - button to delete key settings.
   - Use the Menu Recording Script box to draft the script for this menu recording. You will have the opportunity to record or upload your recording after the profile is created.
7. When you have finished configuring all your phone menu rules, click **Create Profile**.

8. To upload and create menu recordings for your profile skip to the **Upload a Recording** and **Create Your Own Menu Recording** sections.

**Define Business Hours**

Define Business Hours allows you to have separate menu options and recordings 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

2. Optional: Enter hours and dates for **Lunch Hour**, **Business Hour Exceptions**, and **Holiday Hours**.
3. Click **Next**.
4. 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.

![Key Examples](image)

- Click the + and - buttons to add and delete key settings.
- Use the **Menu Recording Script** box to draft the script for this menu recording. You will have the opportunity to create or upload a menu recording after the profile is created.

5. When you have finished configuring your Business Hours menu, click **Next**.
6. As appropriate, repeat steps 1-4 above to configure menus for After Hours, Lunch Hours and Holiday Hours. When complete click **Create Profile**.

### Upload a Recording

Once you have created an Auto Attendant Profile you now can create or upload recordings for each menu.

To upload a recording, proceed to Step 1. To create a new menu recording skip to **Create Your Own Menu Recording**.

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

![Upload Recording](image)

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

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

Create Your Own Menu Recording

1. To record a menu:
• 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.
• Click Record
• 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 menu recording.

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

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

**Activating Your New Auto Attendant Profile**

1. Return to the main Auto Attendant page.
2. Locate the profile you created and edited in the list.
3. 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.

![Music on Hold Library](image)

This is the default music on hold for extension users who have not selected their own music on hold.
3. When the dialog box appears confirming your selection, click OK.

![Success](image)

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

To grant administrator privileges to an individual, you must first create a User Profile for them. See the User Profile section for directions.

1. Click **My Account** on the top navigation bar.
2. Click **Privileges**.
3. To copy another administrator’s privileges for the new administrator, click **Copy**.
   To select the new administrator’s privileges manually, click **Add New Admin**.

4. Select a User Profile.
5. Select the administrative privileges for the user. By clicking on a link, like Phone System Service, more options specific to that function becomes available.

6. If you have multiple PBXs, select which PBX these administrative privileges will apply to.

7. Click Add

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

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