8x8 Global Cloud Communications

8x8 Admin Console

Administrator Guide for Virtual Contact Center

Contents

About 8x8 Admin Console

Welcome to 8x8 Admin Console. 8x8 Admin Console is an online portal for 8x8 account administrators to manage their company's phone system from any desktop.

Using 8x8 Admin Console, phone system administrators can:

- Claim and manage numbers.
- Manage 8x8 Work users and admins.
- Manage your phone system features, such as automatic call handling, call queue, ring groups, and music on hold.
- Assign active phone numbers to 8x8 services.
- Check device inventory.
- Manage sites and phone systems.
- Open and track support cases.

System requirements

You require the following systems to operate:

- Microsoft XP or newer
- Mac OS 10.5.4 (Leopard®) or newer

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The latest versions of the Google Chrome browser are supported for all operating systems.

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

Windows XP	Windows 7 and Vista	Mac
• Pentium 4 1.3 GHz/AMD Athlon XP 1500+ or newer • 512 MB of RAM	• Pentium 4 1.3 GHz/AMD Athlon XP 1500+ or newer • 1 GB of RAM	• Powercomputer G4/G5 or newer • 512 MB of RAM

- Cable modem: DSL or better
- Minimum: 1.5 Mbps down and 384 kbps up

What's new in Beta for 8x8 Admin Console?

Ability to manage user groups for Beta users

This release introduces the new **User Groups** feature for Beta customers.

> **Note**: If you want to learn more about it, please contact your 8x8 Admin Console to provide access to the **8x8 Admin Console - User Groups** standalone guide.

The new **User Groups** feature allows admins to limit the scope of access in specific role assignments by giving customers more segmented access to data, such as call recordings access.

For example, supervisors can only see recordings related to those groups they are responsible for and the members who belong to them.

> **Note**: Each user can belong to only one user group at a time.

Based on the user groups, admins can scope role assignments for recordings to a limited group of users:

- Set up user groups
- Assign members to a specific user group
- Create new permissions and role assignments based on user groups
- Limit users' access to recordings

Features

- Create role assignments for accessing call recordings that are scoped to recordings from specific groups of users:
  - **View groups and their members** - allows members only to view groups and their members.
  - **Manage membership only** - allows users to view and edit groups and only to add members to groups.
  - **Manage groups and their members** - allows users to view, edit or delete groups and to add or remove members from groups.
- Provide data access control to call recordings for a specific group of users.

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User groups overview

Admins can now create role assignments for accessing call recordings that are scoped to recordings from particular groups of users:

- **Manage user groups** - Through the new **Work Groups** > **User Groups** section, admins can:
  - Create, edit, and delete user groups in Admin Console
  - Search user groups by group name
  - Download the user groups report in a CSV format
  - Add, delete or move members to another group
  - Edit members in bulk - move users to another group or remove users from this group

- **Assign a user to a user group from the Users page** - As an admin, you can assign a user to a specific group while creating or editing a user.

- **Manage new permissions and role assignments based on user groups** - Through the Roles & permissions page, you can create roles based on the following new permissions:
  - View groups and their members - allows users to view groups and their member permissions.
  - Manage membership only - allows users to view groups and add or remove members to/from a group.
  - Manage groups and their members - allows users to view, add, edit or delete groups and to add or remove members to/from groups.

- **Provide limited data access control for the Storage application** - As an admin with permissions granted for the Storage app, which gives access to call recordings, you can now provide a limited data access control for the Storage Admin and Storage API roles. The Storage filter is visible on the Role Assignments page only if the user has the appropriate permissions for the Storage app.

- **Handle user access to recordings** - You can now assign limited access to recordings based on specific user groups.

  Depending on the permissions and scope(s) granted, users can see:
  - Only the recordings for users belonging to a specific group
  - The recordings for users belonging to all groups.
  - The recordings for users belonging to that particular site (cluj) and all groups.

If you want to learn more about user groups, click here.

What's new in the 8x8 Admin Console 1.43 release?

In this release, we are introducing the following features and enhancements:

- Ability to export audit events in a CSV format
- Ability to enable group voicemail notifications from Ring Groups and Call Queues
- Ability to stop recording a conversation
- Enforce a valid site address while creating a user
- Enhanced Port order request
- New notification about configuring storage policies for 8x8 Work
- Other improvements

Ability to export audit events in a CSV format

Customer admins with appropriate permissions can generate a CSV report of Audit Events. The capability of the audit log export enables customer admins to self-manage their audit data according to their data governance and retention requirements and to process 8x8 audit events in external audit tools.

The report includes all the columns viewable to the user, as you selected, without making any additional column selections.

This capability is helpful for long-term storage and offline analysis.

> **Notes**:
> - The report contains a maximum of 50.000 rows.
> - The output contains identifiers and details in JSON format.

For details about the data the Audit events report displays, click here.

To generate an audit events report:

1. Go to **Home** > **Audit events**.
2. On the **Audit events** page, in the upper-right corner, click **Generate report**. A CSV format report is generated.
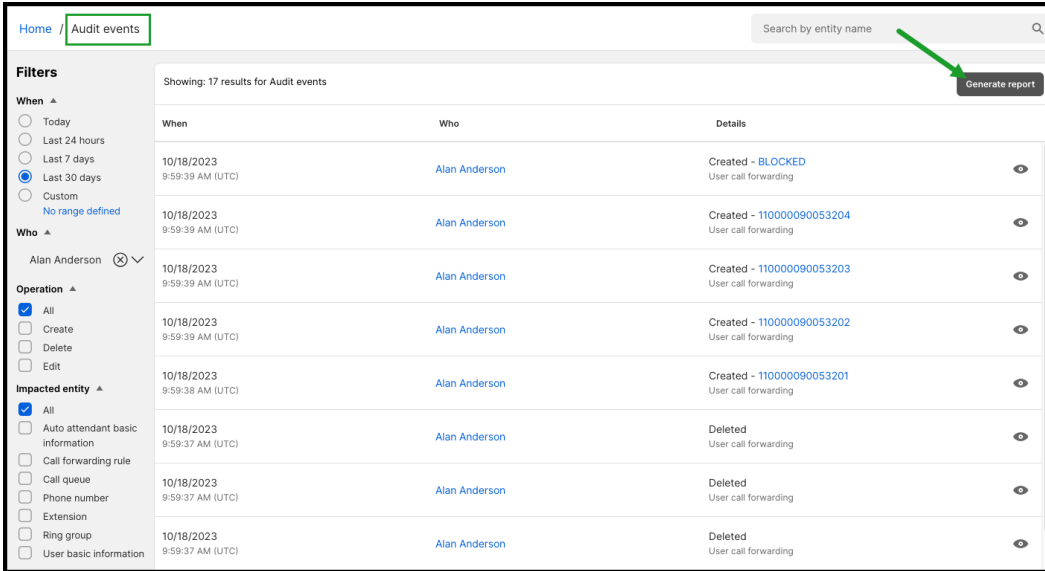
3. Click **Download** and and save the .CSV report locally.
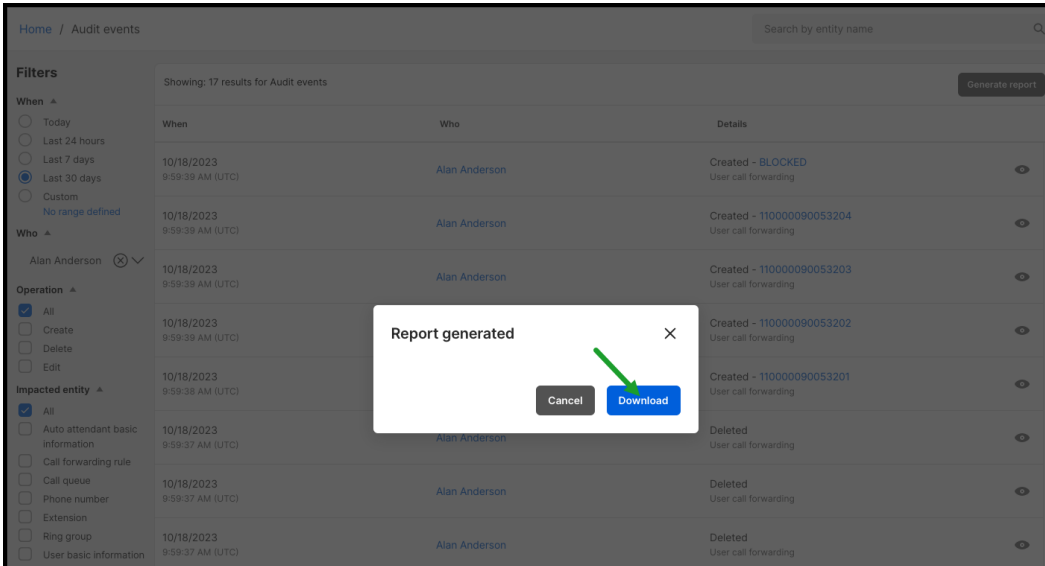
Ability to enable group voicemail notifications from Ring Groups and Call Queues

Starting with this release, you can configure group notifications to a separate email address to receive voicemail notifications instead of emailing the members who signed up for voicemail on the group. Until now, you could enable voicemail notifications from non-user entities such as ring groups (RG) and call queues (CQ), but you had to get certain professional services involved.

> **Note**: Only one email address is supported. It may be a distribution list too.

You can choose one of the following notifications options:

- **Attachment only and delete original voicemail** - Set up a group email address to receive voicemails, and then delete it from the service. You don't have to enable the access of any group member to voicemail (group members no longer receive voicemails in their email boxes, these always will be empty).
- **Disable Notification** - Set up a group member to receive voicemail notifications. At least one group member should have voicemail access enabled (voicemails are built up in the box).
- **Attachment only** - Set up a group member to receive voicemail notifications. At least one group member should have voicemail access enabled (voicemails are built up in the box).
- **Notification only** - Set up a group member to receive voicemail notifications. At least one group member should have voicemail access enabled (voicemails are built up in the box).

> **Note**: When trying to disable all the group members and you choose the **Attachment only and delete original voicemail** option, you don't have to enable the access of any group member to voicemail. For other options, a warning notification displays, and you have to enable at least one member to have voicemail access.

To enable group voicemail notifications to be sent to a separate email address:

1. In the 8x8 Admin Console **Home** page, under **Phone System**, click **Ring Groups** or **Call Queues**.
2. In the **Ring Groups** or **Call Queues** page, while creating or editing a new ring group or call queue, under **Voicemail settings**, select the **Attachment only and delete original voicemail** option from the **Notification** list.
3. Attach a group email address where the notification to be sent.
4. Click **Save**.
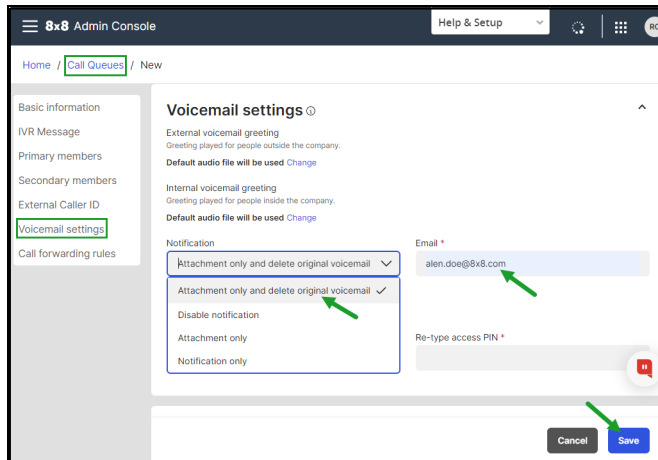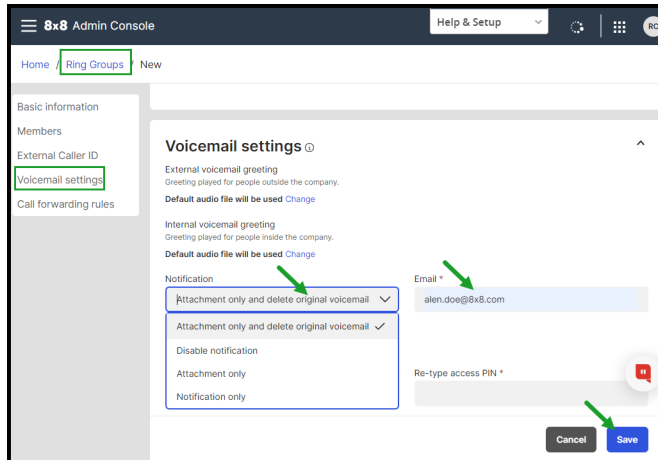
Notes:
- This new functionality requires a new Cloud Voicemail Notification Service.
- When you receive a voicemail, a new email template is available .

To learn how to set up a ring group, click here. To learn how to set up a call queue, click here.

Ability to stop recording a conversation

This release introduces a new call recording mode: **Record all calls with user control**. This new option allows users to record a call and stop the recording covering topics that should not be recorded, or if there is no need to record the

conversation.

For example, if the agents have permission from their employer to make personal calls, they can turn off recording for those personal calls.

> **Important!** This new **Record all calls with user control** option is not intended for credit card handling. If customers want to handle credit card data, they should use the SecurePay Agent for Contact Center.

To find out how to set up call recordings, click here.

Enforce a valid site address while creating a user

While creating a user, if you set the emergency address as a user's Site address, which cannot be validated, a warning message displays, and you cannot save the user. First, you must go to the Sites page and re-enter a valid address for the site whose address you want to use as the user's emergency address. After that, you can use that site address as the user's emergency address.

While editing a user and the user is saved with an invalid address, a warning displays, and you can continue saving the user.

To learn how to set up an emergency address for users, click here, and for sites, click here.

Enhanced Port order request

While submitting a port order request in Admin Console, users can now provide the account number and the PIN for both landline and wireless-type phone numbers. Previously, this was only available and required by carriers for mobile-type phone number.

The new **Account & PIN** feature allows users to provide the account number and PIN for both landline and wireless numbers. However, it is only mandatory for wireless and optional for landline-type phone numbers.

To learn about how to port numbers, click here.

New notification about configuring storage policies for 8x8 Work

The Admin Console Dashboard now notifies the customers who have purchased 8x8 Work Storage add-ons and still need to configure them. The notification guides the admins on how they can configure the Storage licenses and where they can set up the storage policies.

Customers need to set up their purchased storage licenses for 8x8 Work to have access to their recordings. Otherwise, the recordings are kept in Hot Storage only for the set hot period (by default, 30 days) and then permanently deleted from the system.
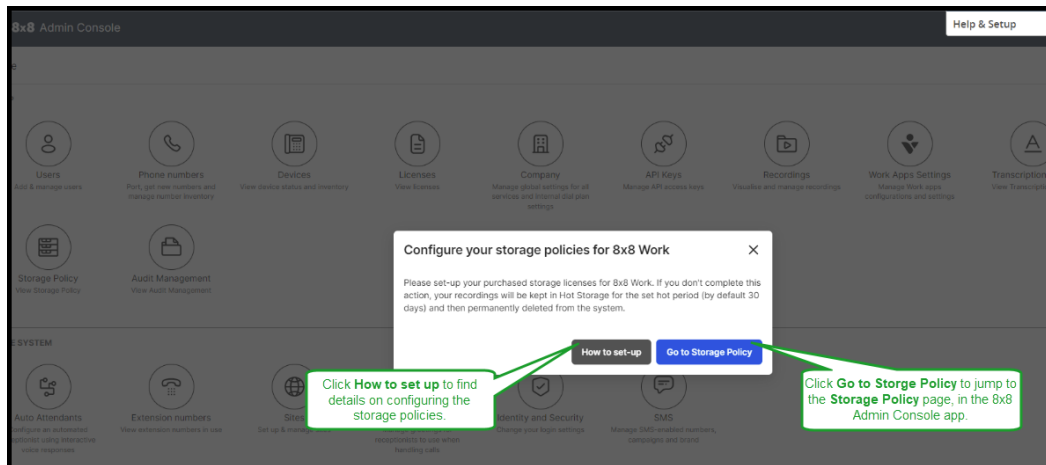
Other improvements

- The **Port** list now displays the port numbers numerically ordered while creating or editing a user under **Voice basic settings**.
- The instruction lines are removed from the bulk upload CSV template for users and contacts. You can gather the guidelines from Create user and contacts in Bulk User Upload Template Field while creating users in bulk or Bulk contact Upload Template Filed while importing external contacts in bulk.
- The **Users** edit page now displays the **Voice basic settings** section expanded by default, and admins can now see all the voice basic settings at a glance.

To learn about how to port numbers, click here.

What's new in the 8x8 Admin Console 1.42 release?

In this release, we are introducing a new updated 8x8 Admin Console UI, which now aligns to all our 8x8 applications. The new interface comes with new elements, such as icons, buttons, modal windows, fonts, etc.

As an 8x8 Admin Console user, you can enjoy a more pleasant and intuitive experience through 8x8 Admin Console. The app interface better matches your experience of configuring and managing your users and enables a more intuitive use.

What's new?

Important! To ensure security standards, 8x8 apps now enforce multi-factor authentication (MFA) for all 8x8 administrator accounts. For details about MFA for admins, read Multi-Factor Authentication (MFA).

Recently, we introduced 8x8 Mobile Admin, a new solution designed for 8x8 Work admins to manage basic admin activities using the 8x8 Work for Mobile app. This new capability offers quick resolutions via the mobile app as well as easy and quick access to a restricted set of top level daily admin tasks (quick updates or changes on demand).

For details about 8x8 Mobile Admin, click here.

Availability

8x8 Mobile Admin is available on:

- iOS mobile devices
- Android mobile devices

To learn more about 8x8 Mobile Admin, check out our detailed help.

See our content for all Previous releases.

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Previous releases

Please find information about the 8x8 Admin Console previous releases here:

Enhanced experience when creating and editing emergency addresses of Sites and Users

A new enhanced form now is available when entering the address emergency for sites and users. It brings additional features that make it easy to create or edit the address.

In addition, the new form allows you to:

- Use Add auto-complete (search as you type)
- Enter addresses manually where auto-complete is not found
- Override an address (with acknowledgement or warning notifications)
- US&CA addresses validated with 911 provider at entry point.

> **Note**: Applies also to user profiles accessed from 8x8 Work apps.

Add a site emergency address

> **Important!** Emergency address and the user's primary phone number must be located in the same country. Otherwise, you cannot use that address as an emergency address.

To add a site emergency address:

1. In the 8x8 Admin Console **Home** page, under **Phone System**, click **Sites**.

2. In the **Sites** page, while creating or editing an existing site, when configuring the site address, under **Details**, you can choose to use an existing address or to enter a new addresss:

A. If you select an existing address from the list

○ Select the site address you want to add from the list under **Address**.

> **Note**: You can enter the address in the **Select...** box to narrow the searching.

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B. If you add a new address:

- Click **Add new address**.
- In the **Add new address** window, select the country where the site is located.
- Select the address you want to add from the list below, and click **Validate**.

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Add new address

Country *

United Kingdom

⬤○ Enter address manually

Select an address *

8 X 8 UK Ltd Carbonnel Court 114 Whitechapel High Street London E1 7PT

Cancel   **Validate**

- ○ If you don't find the address in the list, select **Enter address manually** toggle On and enter the site address manually.

- ○ Click **Validate**.

- If the new address is not recognized as being valid, you can choose an address that is closest to your current location or , you can use the address as entered.

- Once the address is confirmed as validate and eligible for the Emergency Services, click **Save**.

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Add new address ✕

Country *

United Kingdom ⌄

🔵 Enter address manually

Street number *

114

Street name *

Whitechapel High Street

Address line 2

Add locality

City / Town *

London

State / Territory

London

Postcode *

E1 7PT

⊘ This does not appear to be a valid address.

Your address could not be found. Please choose an alternative option

We have identified the following validated address. Please choose the address that is closest to your current location

🔵 Use existing: 114 Whitechapel High Street, London, E1 7PT

◯ Use the address as entered

☑ I acknowledge that this address may not be eligible for Emergency Services. In the event of an emergency, I acknowledge that an Emergency Services operator may not have access to a user's location information.

Cancel   **Select**

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> **Notes**:
> - In the US only, a third-party entity (Emergency Validation provider) checks the address from the emergency registration perspective.
> - You can override an existing address, but it might not be registered for Emergency Services if it's not validated.

3. Under **E911 Notification Emails**, add the email address(es) to be notified when 911 is dialed from a number associated with this Site. It is a best practice to notify at least one user at the same location where the call is made.

4. Click to save the site.

Add a user emergency address

> **Important!** Emergency address and the user's primary phone number must be located in the same country. Otherwise, you cannot use that address as an emergency address.

You can choose to add as an existing address either the site address or an existing address from the available ones.

To add a new user emergency address:

1. In the 8x8 Admin Console **Home** page, under **Setup**, click **Users**.

2. While creating or editing an existing user profile, scroll down to see **Emergency address**

3. Under **Emergency address**, you can choose to use as emergency address the is

the same as the site address or enter a new emergency address.

- **A. If you use the site address as emergency address:**
  - ○ Select the **Use the Site address** checkbox and use the site address as an emergency address.

  B. If the user is not physically located in the country of their primary phone number:

  - ○ Clear the **Use the Site address** checkbox.

    > 📝 **Note**: You can enter the address in the **Select...** box to narrow the searching.

  - ○ Optionally: If the emergency address and the user's primary phone number are not located in the same country, that number cannot be validated. Choose another address or override it.

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- **C. If you enter manually a new address as emergency address**:

  - Click **Add address manually**.

  - In the **Add new address** window, select the country where the site is located.

  - Search for the address you want to add in the list below, and click **Validate**.

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- ○ If you don't find the address in the list, select **Enter address manually** toggle On and enter the site address manually.

- ○ Click **Validate**.

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○ If the new address is not recognized as being valid, you can choose the option that fits you better:

- Click **Use existing**.

- Click **Use the address as entered**.

Once the address is confirmed as validate and eligible for the Emergency Services, click **Save**.

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Add new address   ✕

Country *

United Kingdom   ⌄

🔵   Enter address manually

Street number *

114

Street name *

Whitechapel High Street

Address line 2

Add locality

City / Town *

London

State / Territory

London

Postcode *

E1 7PT

🚫 This does not appear to be a valid address.

Your address could not be found. Please choose an alternative option

We have identified the following validated address. Please choose the address that is closest to your current location

🔵 Use existing: 114 Whitechapel High Street, London, E1 7PT

⚪ Use the address as entered

☑ I acknowledge that this address may not be eligible for Emergency Services. In the event of an emergency, I acknowledge that an Emergency Services operator may not have access to a user's location information.

Cancel   **Select**

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> **Notes**:
> - In the US only, a third-party entity (Emergency Validation provider) checks the address from the emergency registration perspective.
> - You can override an existing address, but it might not be registered for Emergency Services if it's not validated.

Help & Setup assistance returns to AC

If you're more comfortable with the **Help & Setup** feature than the **Otto** chatbot, you now can use it from any page of the 8x8 Admin Console. The **Help & Setup** help assistance was enabled again and it's ready to assist you.

For details about how to use the **Help & Setup** support, click here.
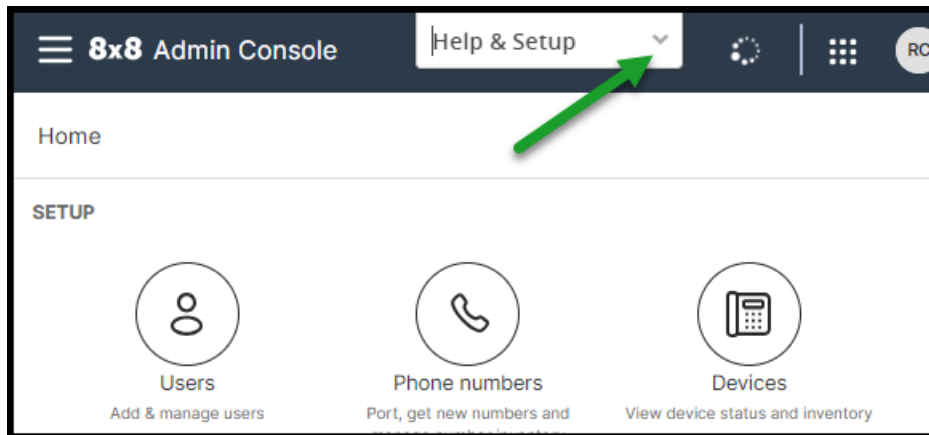
In this release of 8x8 Admin Console, we are introducing the following features and enhancements:

Enhanced Otto chatbot feature

You now are able to use the **Otto** chatbot again in 8x8 Admin Console. In addition, you can you can swipe the slider on the side of the page if it covers anything on your page.

> **Note**: The temporary **Help and Support** menu is removed from **Otto**. Please, use the **@Report Chatbot Issues** room for any issues/feedback.

The new **Otto** version allows you to perform new actions, by clicking **Settings** on the upper left or the chatbot:

- **Turn on sound** 🔊 - Turn on/off sound.

- **Change language** 🔤 - Click the preferred language you want to use in the conversation with Otto in the list that opens, and click to return to the Settings panel.

- **Email transcript** ✉ - Enter the email address where you want to send the transcript.

- **Download Transcript** ⬇ -Download the transcript on your computer.
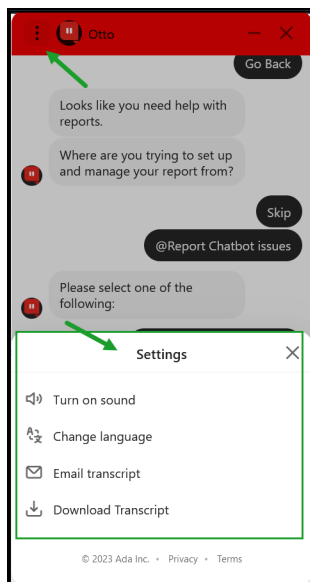
To find more about getting support, click here.

8x8 Admin Console UI French translation capability

The 8x8 Admin Console interface now is available in French. To get the 8x8 Admin Console UI translated to French, you have to set up the browser language to French.

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> **Note**: The content of the **Licenses** page displays in English, because the content is provided by a third-entity via the licenses service.
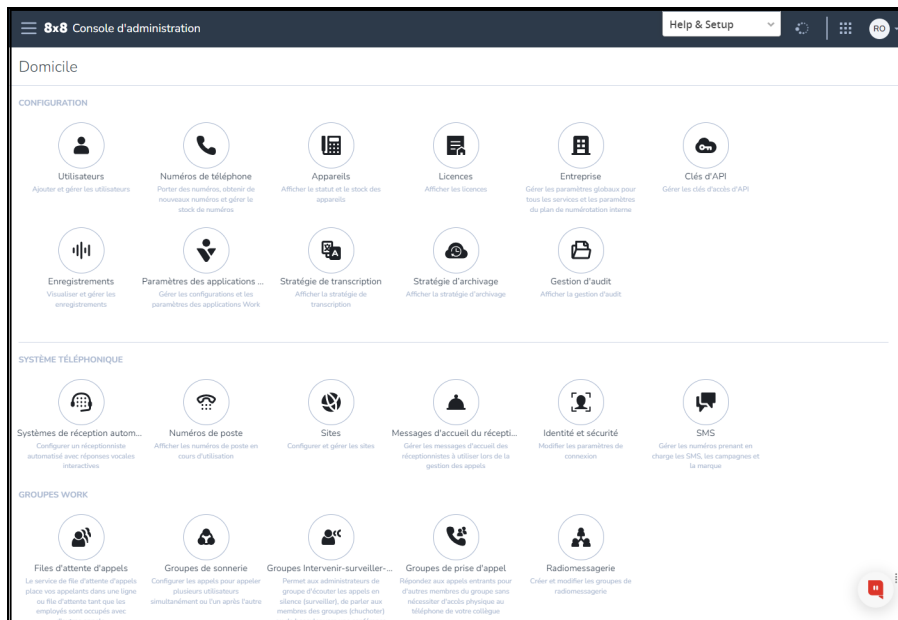
Capability to configure MFA challenge frequency

As an admin, you now have the ability to configure the Multi-Factor Authentication (MFA) challenge frequency for all users, by checking MFA on a user device every selectable x days, up to 90 days.

You can recheck the multi-factor on a user device every selectable x days between:

- Minimum value - **Always** (check MFA at every login).
- Maximum value - **90 days** (default value).

To check the multi-factor on a certain user device:

1. In the 8x8 Admin Console **Home** page, under **Phone System**, click **Identity & Security**.

2. In the **Identity & Security** page, under **8x8 Authentication**, click **Advanced password** settings and select **Multi-factor authenticator for all users** toggle On to enable mandatory MFA for all users.

3. Slide the cursor to set up the wanted frequency.

4. Click **Save**.

For details about MFA for admins, read Multi-Factor Authentication (MFA).
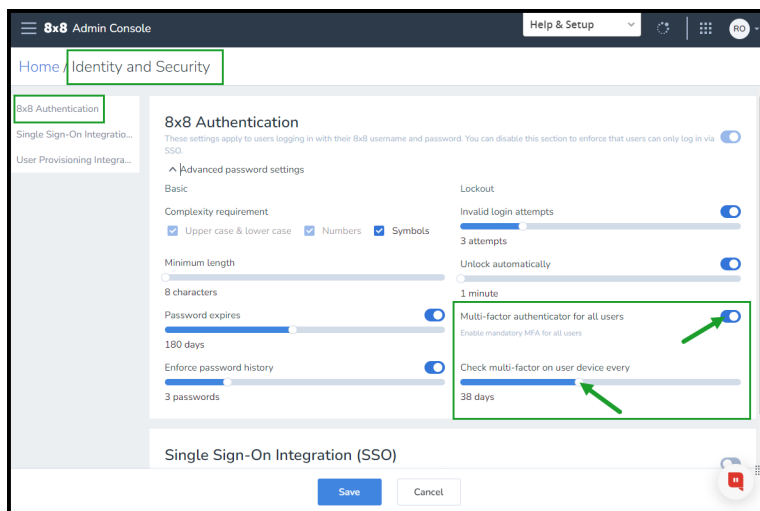
Enforcing Multi-Factor Authentication (MFA) for all 8x8 administrator accounts

To ensure security standards, 8x8 apps now enforce multi-factor authentication (MFA) for all 8x8 administrator accounts.

Starting with this release, to be able to log in to an 8x8 admin account, an 8x8 Admin Console admin must enable Multi-Factor Authentication (MFA) first, and only then an 8x8 admin will be able to:

- Log into 8x8 admin accounts by using Multi-Factor Authentication (MFA)
- Change the multi-factor authentication method and get backup codes

Enable Multi-Factor Authentication (MFA)

Multi-factor authentication adds an extra layer of security to protect your 8x8 user accounts.

8x8 supports different second authentication factors:

- Authenticator apps, such as Google Authenticator, Authy, Okta Verify
- E-mail
- SMS
- Backup codes

Note: Once the customer administrators opt to make MFA mandatory for their users, they will enable MFA for all users, company wide. It is not possible to enable it for individual users.

To enable MFA:

1. In the 8x8 Admin Console go **Home** > **Identity & Security**.
2. In the **Identity & Security** page, under **8x8 Authentication**, expand Advanced password settings and select **Multi-factor authentication for all users** toggle On to enable mandatory MFA for all users.
3. Slide the cursor to set up the wanted frequency.
4. Click **Save**.

All users will now be required to configure a second factor during the next login.

Note: This configuration only applies to logins using the 8x8 Authentication. Users logging in with organizational credentials via Single Sign-on Integration (e.g, Okta, AzureAD) are not prompted for 8x8 multi-factor.

To find more details and how this configuration works, read here.

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Log into 8x8 admin accounts by using Multi-Factor Authentication (MFA)

After the MFA was enabled, during the first login, admins have to configure their second factor before logging into their 8x8 admin accounts.

To log in to your 8x8 admin account:

1. Navigate to the login page and enter your 8x8 admin credentials and click **Login**.

2. After the MFA is enabled, during the first login, configure the two-factor authentication for your admin account. Choose one of the available option: **Authenticator apps**, **SMS**, **E-mail**, **Backup codes**, and click **Continue**.

3. Enter the verification code and click **Verify**. Once configured, users are logged in as normal.

4. Optionally: During the subsequent login, users can choose to not be prompted for the second factor on the same device for 90 days.

![8x8 logo]

Notes:
- If you are using a different browser, clearing browser cookies, or using incognito mode you have to authenticate by MFA even if the box was checked.
- If you choose to use the Authenticator app, during the subsequent login, a QR code displays and you can install Google Authenticator on your mobile device to generate the time-based one-time password protocol.

In this release of 8x8 Admin Console, we are introducing the following enhancements:

Ability to search external contacts

External contacts are contacts created or imported to make them available via the directory. When an external contact record is deemed necessary to be available via the directory for all users, a contact record is created or imported via a CSV file. Note that this contact is not assigned with any 8x8 services. Learn more about contacts.

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In this release, we are introducing the ability to search external contacts by name, email, job title, department, phone number etc. This comes in handy especially if you are searching through a long list of contacts.

1. Go to **Home > Contacts** to view the list of existing contacts.

2. In the search box, enter a keyword and press Enter to search and filter the contact list based on the keyword.
   A resulting contact list displays.
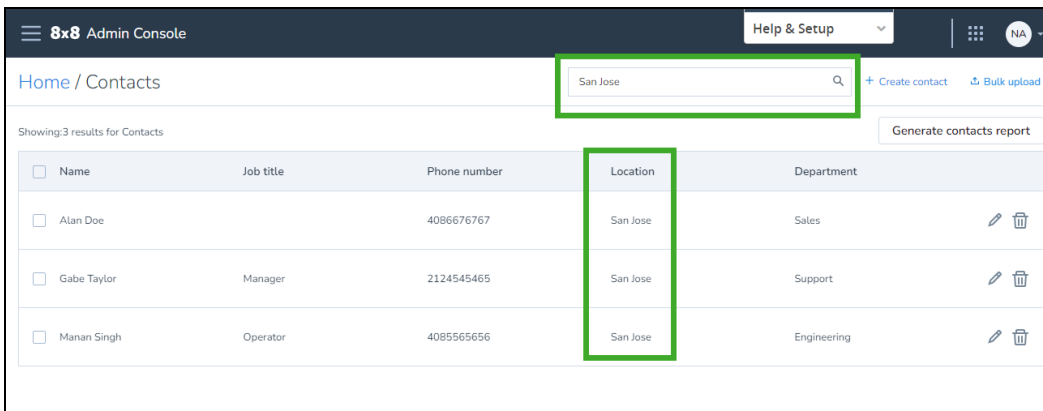
Introducing the Audit Events Viewer

In this release, we have introduced the **Audit events** viewer feature to all 8x8 customers. The **Audit events** feature in 8x8 Admin Console allows administrators to review configuration changes made to their 8x8 services over a period of up to 90 days, in 30-day increments. Use this feature to see who made a change, when the change was made, what type of change was made, and the details of the change. Currently, you can select to view the changes made to:

- Users
- Auto attendants
- Call forwarding
- Call queues
- Phone numbers

- Extensions

- Ring groups

To learn more about how to access audit events and available filters, click here.

Introducing access to Voice for Teams portal

Administrators with an 8x8 Voice for Teams license are now able to log into Voice for Teams portal easily and quickly using the UI button in the 8x8 Admin Console home page. This button is accessible to customers who have purchased an 8x8 Voice for Teams license.

1. In the home page of 8x8 Admin Console, click **Voice for Microsoft Teams** to be navigated to the 8x8 Voice for Teams portal, from where you can manage the sync between MS Teams users and the 8x8 Voice for Teams profiles.
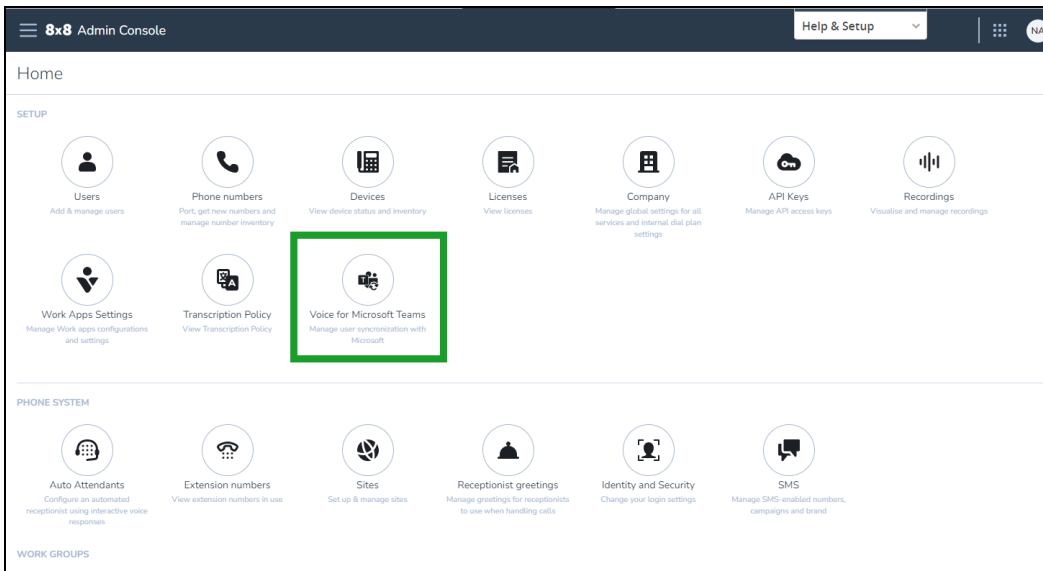
2. The authentication to the Voice for Teams portal is done via the Microsoft 365 SSO.
   At the prompt, enter your Microsoft login credentials.
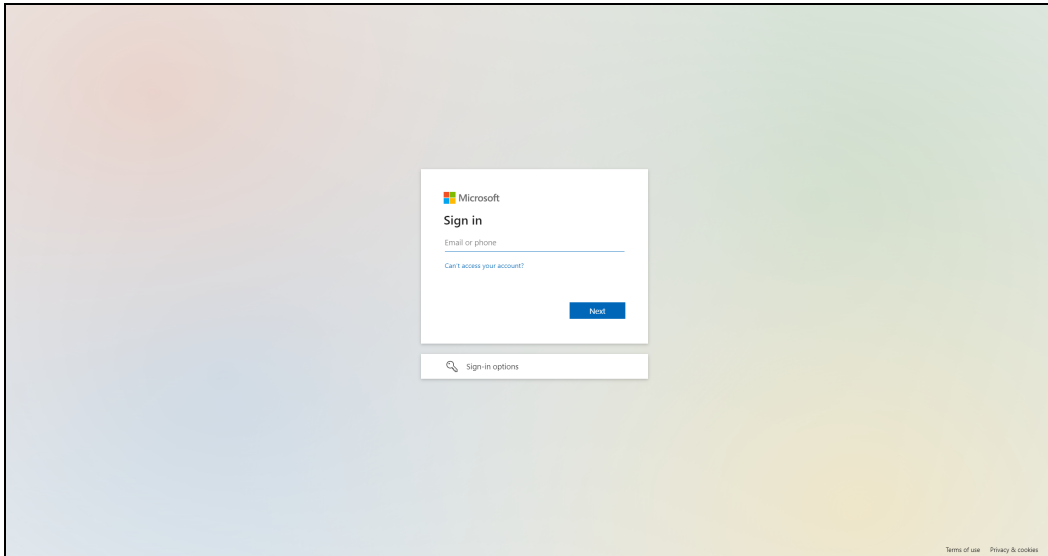
3. The Voice for Teams portal launches.
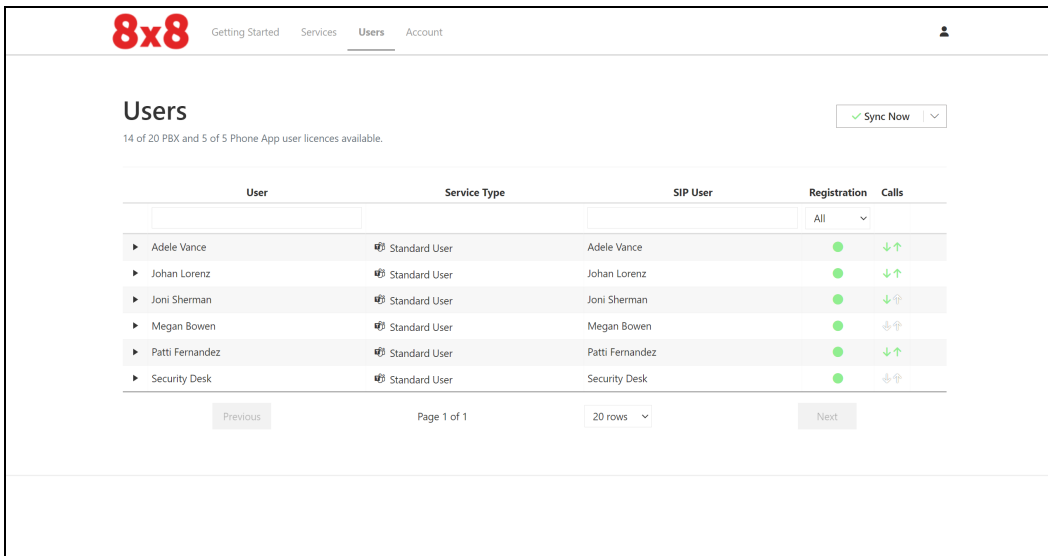
In this release, we have introduced the following new enhancements:

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- New SMS registration feature (brand and campaign registration)
  - Enable or disable users SMS capability
  - SMS registration UI improvements
- Enhanced inbound SMS blocking spam at the company level
- Enhanced inbound SMS spam blocking at the user level
- Improved audio selector searching experience
- Yealink device line key configuration improvements
  - Ability to enable additional BLF Call Ring Notifications
  - Enhanced settings for Line Key configuration (Shared Line Appearance)
  - Speed dial ringtone enhancement for Yealink devices
- Site E911 Notification Email address validation

New SMS registration feature (brand and campaign registration)

Starting with this release, a new SMS registration feature is available to you. The SMS registration feature allows customers to manage both their registration brand and campaign processes and SMS assignment, which is necessary to ensure that customers' SMS are not blocked by the SMS traffic operators.

The SMS registration process contains three sections:

- **Brand** - Manage campaigns registration, by providing basic information about your brand.
- **Campaign** - Define your campaign.
- **SMS enabled phone numbers** - View and disable enabled SMS numbers. (Assign or enable a user to SMS through the User page).

The SMS registration configuration tab is an online web form through which you self-register the SMS traffic to comply with what carriers expect in terms of SMS traffic. Moreover, you can manage the SMS numbers assignment process.

To SMS register your brand and campaign and assign SMS numbers:

1. In the Admin Console **Home** page, under **Phone System**, click **SMS**.

2. In the **SMS** page, register your company and assign phone numbers for SMS traffic.

3. Under **Your Brand**, provide all the basic information about your brand and click

Save.

A call is sent by the app to the Campaign Registry (a third-party entity), and the registration happens asynchronously. The validation might take about one minute.

4. Under **Campaign**, define your campaigns as you need.

5. Under **Your SMS enabled phone numbers**, from the list the user you want to disable from sending SMS, and click **Remove** 🗑 number in the related row. Confirm.

> **Notes**:
> - We only enable SMS numbers only for the US or Canada.
> - A user might have assigned more than one number, and if more than one is SMS capable, you can enable only one at a time.
> - First number is the enabled SMS number.

To assign or enable a user to SMS, navigate to **Home** > **Users** page.

Enable or disable users SMS capability

The new SMS enabled numbers option now is available in each user profile, where you can enable or disable SMS functionality. In addition, you can see if the user's number is assigned to the campaign.

To manage SMS capability:

> **Note**: Make sure you have completed your SMS registration before enabling an SMS .

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1. In the Admin Console **Home** page, under **Setup**, click **Users**.

2. In the **Users** page, search for the user you want to manage the SMS enabled capability, and click **Edit** ✎ in the respective row.

3. In the **Edit** page, click **SMS enabled numbers** in the left menu, and under **SMS enabled numbers**, enable or disable the SMS capability by selecting the toggle on/off.

4. Click **Save.**

> **Note**: If users have more than one phone number assigned, you can only enable SMS for one number at a time.
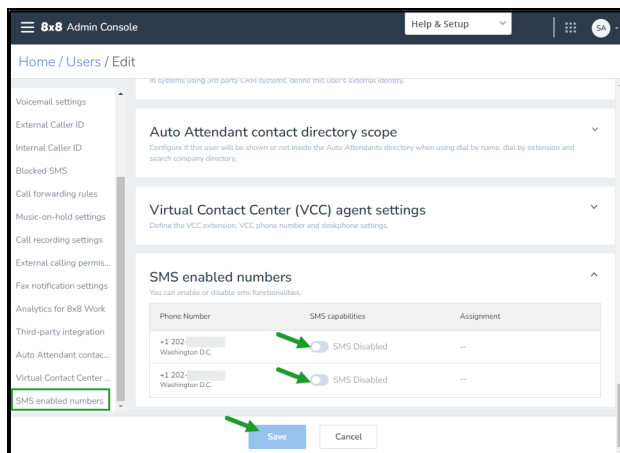
SMS registration UI improvements

New UI improvements are made to the **SMS Registration** section. The following fields under **Your Brand**, now are mandatory to complete and validate the registration process:

- **Website** - Enter the SMS Registration Web URL, which is required for the campaign registration.
- **Vertical** - Displays a list of domains from which you can choose the appropriate one.

Enhanced inbound SMS blocking spam at the company level

If you have admin rights, you now have the ability to block inbound SMS from shortcodes, beside the phone numbers.

As an admin user, you can block inbound SMS for numbers specified in the **Home** > **Company** > **Blocked SMS** tab.
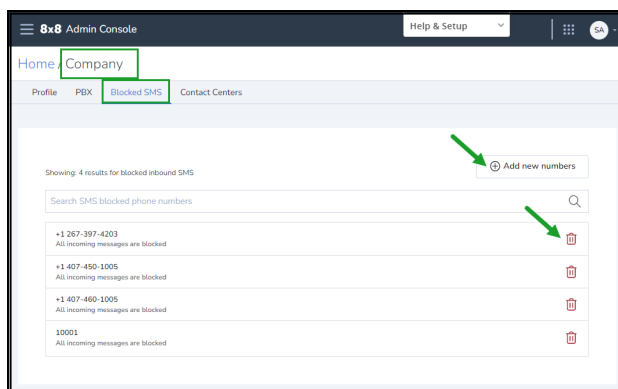
To learn more about how to block SMS , click here.

Both shortcodes and phone numbers you enter must has a valid format:

- Provide phone numbers in the E.164 format, including the **+** or **00** prefix:

    ○ **+14088001500** or **0014088001500**

- Remove any spaces from the phone number of shortcode:

    ○ **0014088001500** instead of **001408 800 1500**

- Provide shortcodes, regardless of their length.

> **Note**: The validation passes as there is no validation around the shortcode length. This long digit sequence passes validation and it is listed in the **Blocked SMS** list, but blocking the shortcode will fail.

Validation fails for input such as:

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- It does not meet the phone number formatting (E.164 numeric format) and it is not a shortcode:

  - If it contains minus sign (**-**) and does not follow the E.164 numeric format:

    - **123-123**

    - **+1407-460-1005** is not the correct phone number format (E.164 [+][country code][subscriber number including area code]).

  - If it contains plus sign(**+**) and it is not E.164 number format:

    - **+568**

  - A series of digits starting with the **00** digits:

    - **0032** - numbers that start with the **00** digits are considered a country prefix and are transformed into plus sign **(+)**, so the input will be **+32**, which is not a phone number or a shortcode.

  - A mix of letters and digits:

    - **568abc**

  - Any series of numbers combined with special characters:

    - **!@#$%**

> **Important!** Validation passes for any sequence of digits regardless of the length, such as 10001, 1, 123456, 123456789000. For the US and Canada, by default shortcodes are 6 digits long. Only these shortcodes will be actually blocked, even all the validated shortcodes are displayed in the **Blocked SMS** list.

To see more details about block SMS supported formats, click here.

Enhanced inbound SMS spam blocking at the user level

As an 8x8 Work user, you now can manage your blocked inbound SMS numbers from **Account Settings** > **Blocked SMS**.

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In the user **Account Settings** > **Blocked SMS** numbers list, the numbers blocked by users display first. At the end of the list, numbers blocked by admins display after numbers blocked by the user. However, the numbers blocked by admins cannot be removed or edited by the user.

> **Important!**
> - Numbers blocked by a user block the inbound SMSs only for that user extension, on UC only or 8x8 Work apps.
> - Numbers blocked by admins block the inbound SMSs for all their users/extensions, in CC and UC.
> - If both the user and the admin block the same phone number, only the admin record will be displayed on the users' list, without any editing permissions.

Improved searching for user capability

In the **Blocked SMS** page, you now have the ability to search for a user number whose format includes the + [country code] prefix, the **Search** capability now considering the (**+**) character.
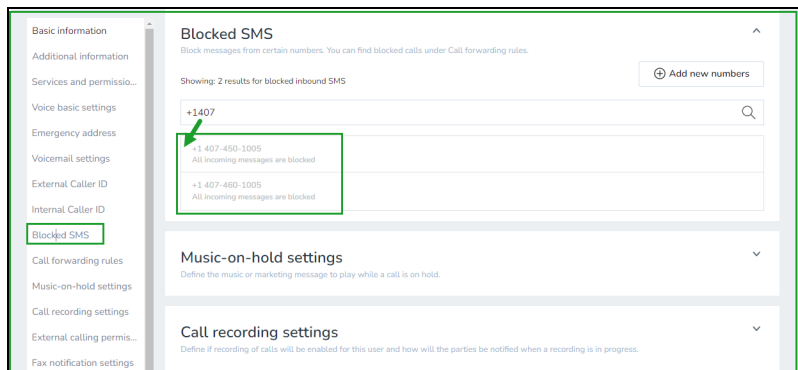
To learn more about how to block SMS as an end-user, click here.

Improved audio file searching experience

You now have the ability to narrow a list of selectable audio files by searching them by name (Voicemail, Auto Attendants, Music on Hold, Call Queues etc.), wherever audio

files are selectable.

Let's say you want to look for a specific audio file from a long list of audio files. You now can simply search it by name:

- In the Admin Console **Home** > **Audio Files** page, enter the entire name or part of the file name in the **Search** box. The audio file displays.
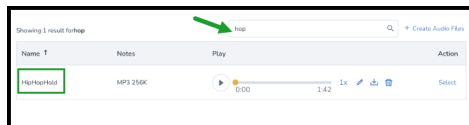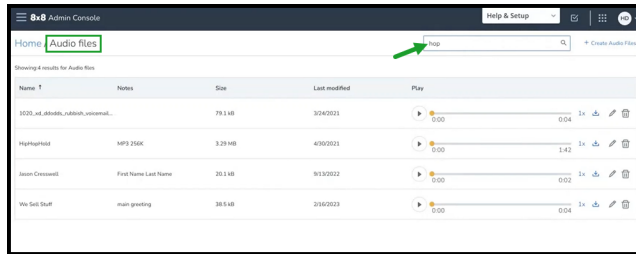
Yealink device line key configuration improvements

> **Note**: These capabilities are applicable only for Yealink devices.

With 8x8 Line Appearance Keys (LAK), you can handle multiple concurrent calls. You can add or remove the Line Appearance Keys from the 8x8 Admin Console and push them to the phone device. We are introducing new line key setting capabilities for the Yealink devices:

- Ability to enable additional BLF Call Ring Notifications
- Enhanced settings for Line Key configuration (Shared Line Appearance)
- Speed dial ringtone enhancement for Yealink devices

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Ability to enable additional BLF Call Ring Notifications

For the users who have Yealink devices, while you are configure phone keys plan, you now have the ability to enable one of the additional **BLF Call Ring Notifications** options:

- Call screen notifications
- Call audio tone for incoming calls

To enable one of the additional BLF Call Ring Notifications options:

1. From the main 8x8 Admin Console, go to **Users**.

2. Click to edit an existing user and expand **Voice basic settings**, and make sure the user has a Yealink device.

3. Click **Line key configurations** next to **Device model**.

4. In the **Edit device settings** window, under **Additional BLF Call Ringing Notifications**:

    - Select to toggle on/off Enable call screen notifications.
    - Select to toggle on/off Enable call audio tone for incoming calls.

5. Click **Save**.

Note: This capability is only applicable to busy lamp field (BLF) keys.
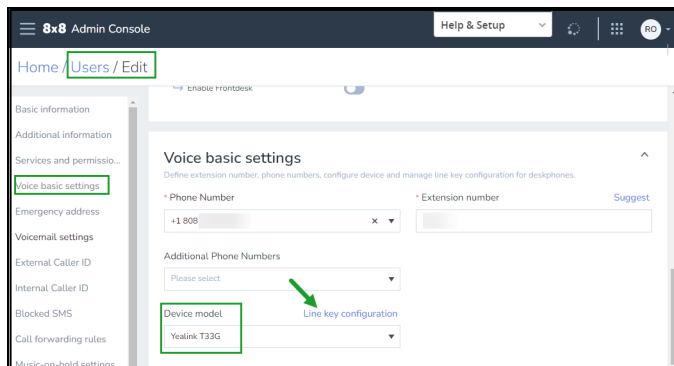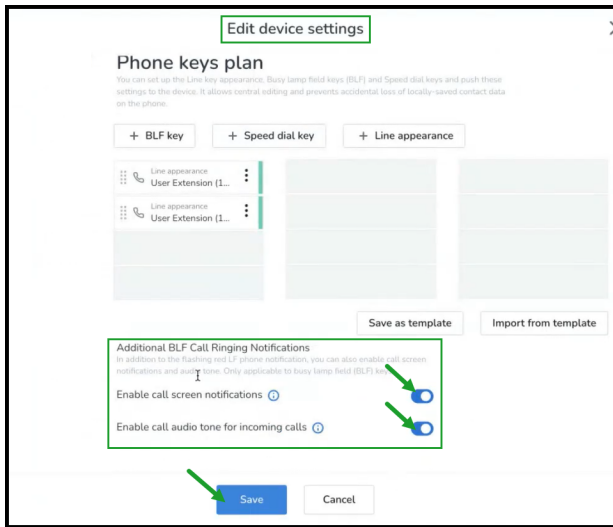
Enhanced settings for Line Key configuration (Shared Line Appearance)

For users who have Yealink devices,, while you are configuring the line appearance keys via the **Users** > **Voice basic settings** section, in addition to the **Line Appearance - User** line key type already available for the Yealink devices, the **Line Appearance - Shared** line option now is available, as well.
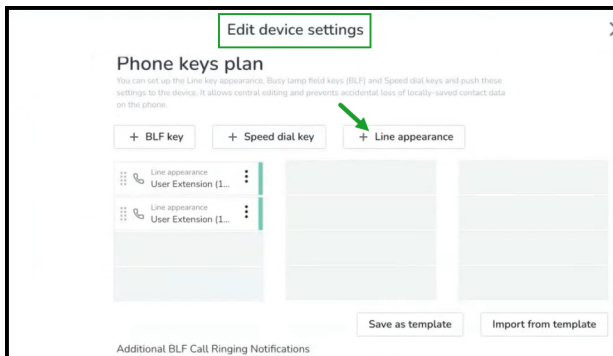
To learn more about how to configure line appearance keys, click here.

Speed dial ring tone enhancement for Yealink devices

For the users that have Yealink devices, while you are configuring the Speed dial key via the **Users** > **Voice basic settings** section, when you select one of the available ringtone types, it is enabled, and the guest will hear this ringtone when the call comes from this extension speed dial.

> **Notes**:
> -This improvement only affects the device whose ringtone configuration you change.
> - For users who have Yealink devices, you cannot go back to any previous configuration.
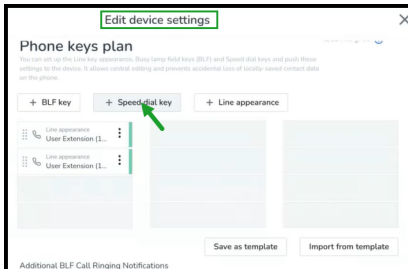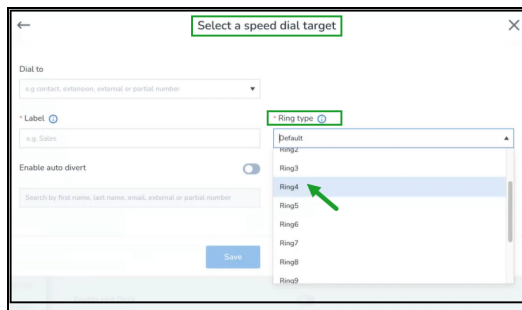
To learn more about how to set up speed dial keys, click here.

Site E911 Notification Email address validation

This enhancement makes a minor change to emergency email address validation for sites.

You have the ability to associate an emergency email address to sites from the US and Canada. If any user from that site makes an emergency call, a notification is sent to the associated emergency email address.

Starting with this release, any email addresses having no dot (.) in the domain part and email addresses with an suffix apostrophe (') do not pass the validation.

- **Before invalid email flagged** - Previously, you could register an invalid email address for emergencies. The email addresses having no dot (.) in the domain part and email addresses with a suffix apostrophe (') passed the validation.
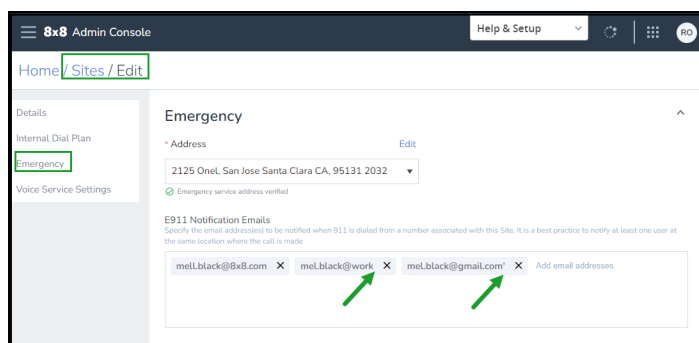
- **After invalid email flagged** - You now cannot register an invalid email address for emergencies. The email addresses having no dot (**.**) in the domain part and email addresses with a suffix apostrophe (') do not passed the validation anymore.
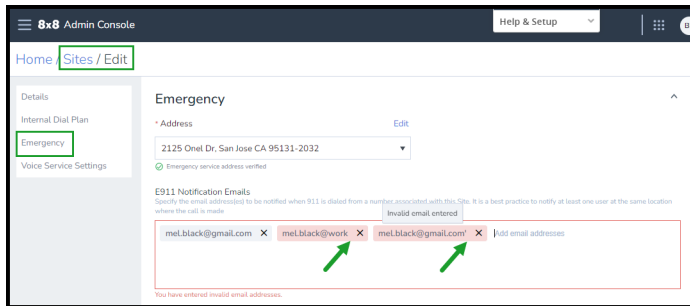
In this release, we have introduced the following new enhancement:

Ability to block spam SMS

A majority of incoming calls aren't from your customers, instead, they're from scammers and telemarketers. More recently, these attacks have moved over to SMS, disrupting teams' activity.

In this release, 8x8 offers phone system administrators the ability to block inbound spam SMS by blacklisting phone numbers. This blocks inbound spam SMS from the specified numbers for all user extensions on the PBX including 8x8 Work and 8x8 Contact Center users. End-users can view the list of blocked numbers on 8x8 Work for Desktop without any editing permissions. This feature addresses any security concerns related to SMS scams, such as a user tapping a link, opening an attachment, calling a number, likely to cause some issue.

> **Note**: All admins with the 'Company' permission can access this capability.

Features

- The numbers blocked by admin apply to all user extensions on 8x8 Work and 8x8 Contact Center.

- Users can add multiple numbers by entering them manually or copying and pasting from a CSV file or another document.

- Numbers must be formatted in E. 164 format. e.g. +1 (408) 876 6543.

- An error message is displayed when:

- A number already blocked is added.

- A number is entered in an invalid number format.

- A number is duplicated in the modal window.

> **Note**: The error message is not displayed if the number is already blocked and there is no validation around duplication overall per the entire list.

Supported formats

- Shortcodes will be supported in a future iteration.

- Phone numbers ranges are not currently supported.

- There are no restrictions around which phone numbers can be blocked. They are not checked against the Company Directory or Personal Contacts.

To block spam SMS:

1. Log into 8x8 Admin Console.

2. Go to **Home > Company**.

3. Select **Blocked SMS**.

4. On the top right corner, click **Add new numbers**.

5. Enter the phone numbers to block SMS from. Make sure to enter it in the E.164 format (e.g. +1 (408) 876 6543)

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> **Note**: As you finish entering a phone number, press Enter/Space to begin entering the next number.

6. If you entered an incorrect number, you must delete the number and reenter the correct number. You are not allowed to edit.

7. If you entered a duplicate number within this entry, you are alerted to remove the duplicates before saving.

> **Note**: This does not check for duplicates against the existing list.

8. Once you complete entering the list of phone numbers, click **Block**.

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9. Verify the list of blocked numbers that appear.
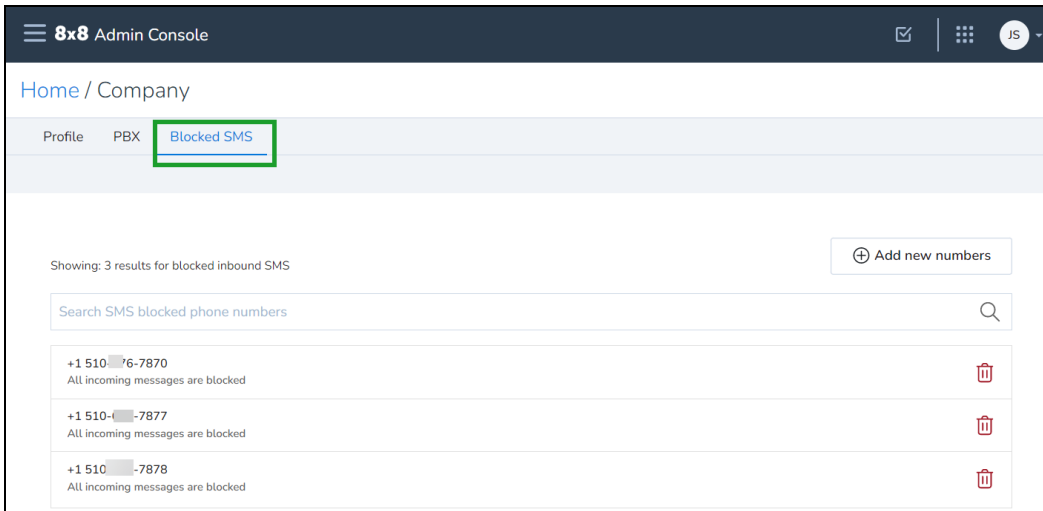
Access the list of blocked SMS numbers as an end-user

Alert: Ability to access the list of SMS numbers blocked by admin is available on 8x8 Work for Desktop 7.26 release which will be released in Beta during mid December and generally available to all in early January 2023.

As an 8x8 Work for Desktop user, you can now access the list of SMS numbers blocked by your admin. Additionally, if you are experiencing spam SMS from unknown numbers, you can block SMS from those numbers on your end. The numbers you add are blocked from sending inbound SMS to your extension only. Other extension users in your company are not impacted.

To access the blocked inbound SMS numbers:

1. Log in to 8x8 Work for Desktop.

2. From the menu, click **Settings** ⚙ > **Account Settings**.

3. From the list of Account Settings, select **Blocked SMS**.

4. You can view the list of numbers blocked by your admin. Note that they are not editable.

5. To add more numbers, click **Add new numbers**.

6. Enter the numbers in the E. 164 format.

7. Once you complete the list, click **Block**.

8. Verify that the list now displays the numbers you added. They appear on top of the admin list. You can delete these numbers at any time.

> **Important**:
> - Numbers blocked by users block inbound SMS only for that user extension on 8x8 Work apps.
> - Numbers blocked by admins block inbound SMS for all their users/extensions, in 8x8 Work and 8x8 Contact Center.
> - If both user and admin block the same phone number, only the admin record will be displayed on the users' list, without any editing permissions.

In this release of 8x8 Admin Console, we have introduced the following enhancements:

Ability to reassign users from one site to another

An 8x8 user without a license can now have their site updated individually from one PBX to another PBX. In this release, you can move a user who is not yet assigned with a license, from one site to a site in another PBX. This gives you the convenience of

redistributing users before assigning licenses.

> **Note**: Moving users with licenses are currently only supported within the same PBX through bulk edit only.
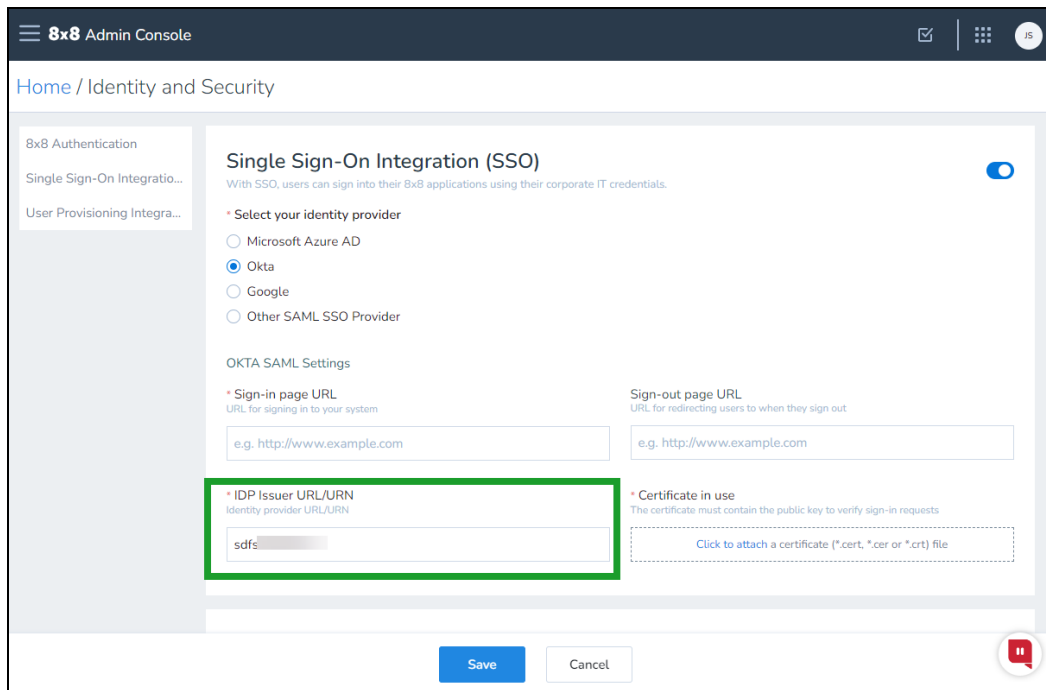
Bug fix

We have also fixed a bug for users who want to use PBX system extensions on Line keys. You can now retrieve device line key configuration when a system extension such as call park extension is configured.

In this release of 8x8 Admin Console, we have introduced the following enhancements:

Relaxed validation logic for Identity and Security information

While setting up Single Sign-On for a SAML provider such as Okta, we have relaxed the validation logic for IDP Issuer field value in the Identity and Security page. Let's say you select Okta as your Identity Provider, you can now enter a value for the IDP Issuer field without any restriction.

Enhanced tool tip for porting phone numbers

We have introduced a more helpful tool tip for the preferred porting date field. While submitting a request for porting phone numbers, the tool tip message alerts you that your preferred date of porting is not a guaranteed date for porting and that once the request is submitted, our porting team will communicate a confirmed porting date allowing you to make any further arrangements. After selecting the porting numbers, you are alerted once more before proceeding to the next step in porting
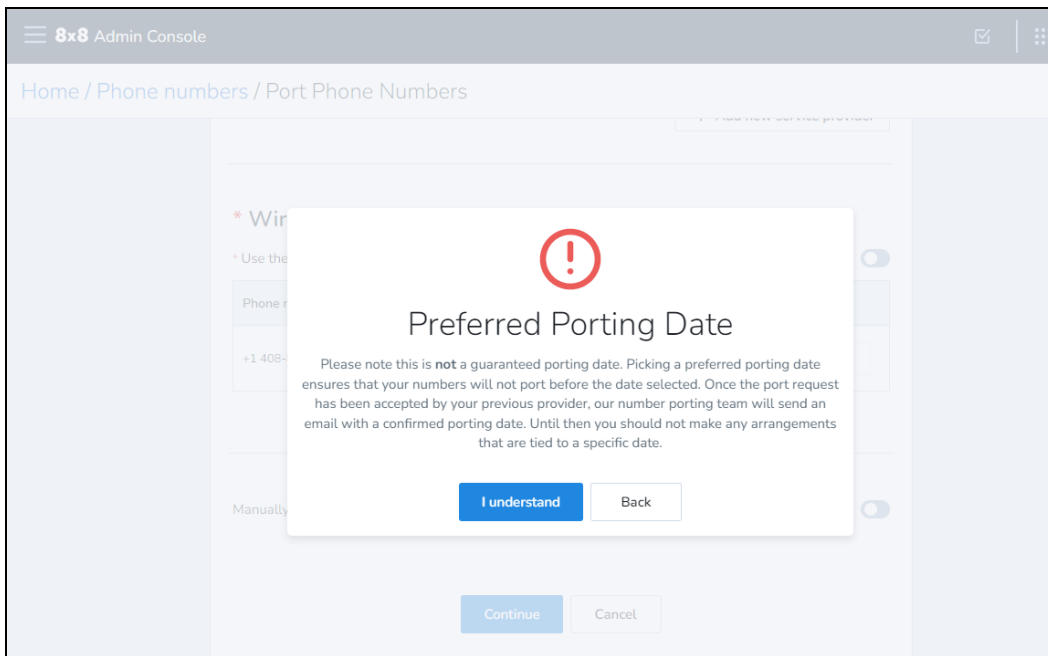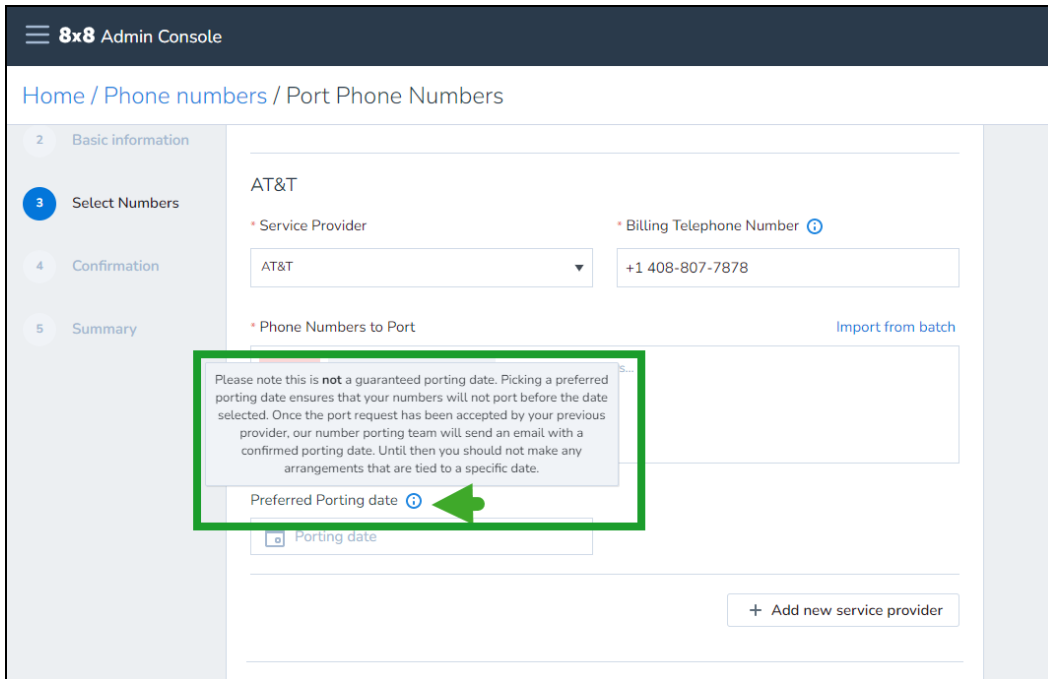
Updated validation message for BMW group admin

While selecting a user as a Barge-Monitor-Whisper (BMW) group admin, the system validates the license eligibility of the user to be a BMW group admin and displays a message when the validation fails. This message is now updated for brevity and better user experience.
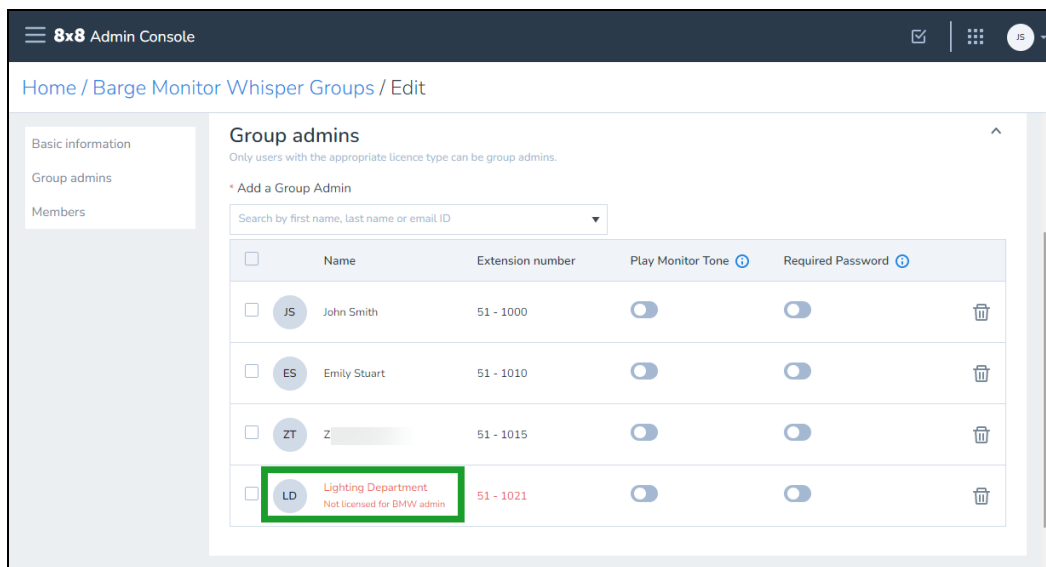
Translation support for Estonia and Ecuador dial plans

We have now added translation support for Estonia and Ecuador global dial plans.

In addition to the above enhancements, we have released bugs fixed in this release.

In this release of 8x8 Admin Console, we have introduced the following enhancements:

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Multi-Contact Center enhancements (Limited Availability)
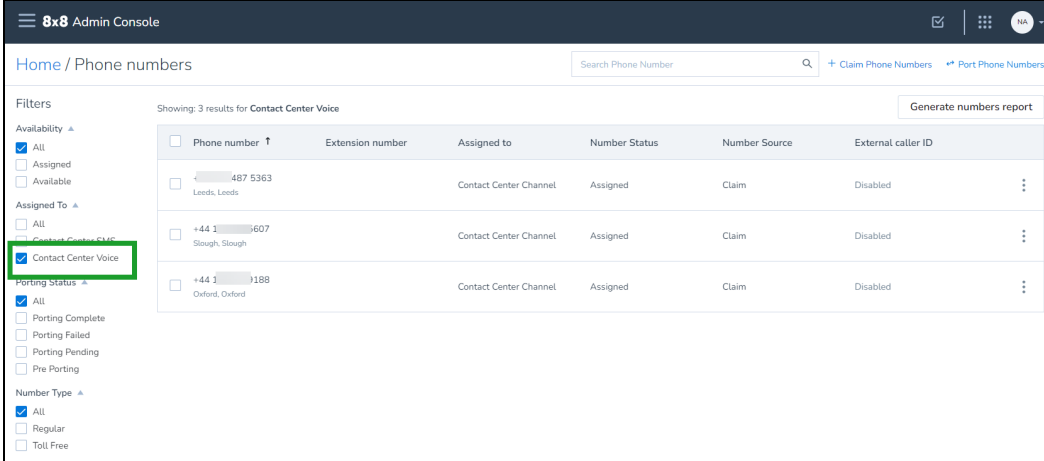
8x8 is introducing support for multiple contact centers in this release. As an 8x8 Contact Center customer, you can now have more than one tenant each with different license types. As a multi-contact center customer, you will notice the following changes in 8x8 Admin Console:

- **Channel rerouting and logins** page is now moved under the Company page: To access this page, from **Home**, go to **Company** and select the **Contact Centers** tab. You will see a list of contact centers with name, region, and the routing plan. To learn more about the routing plans, click here.
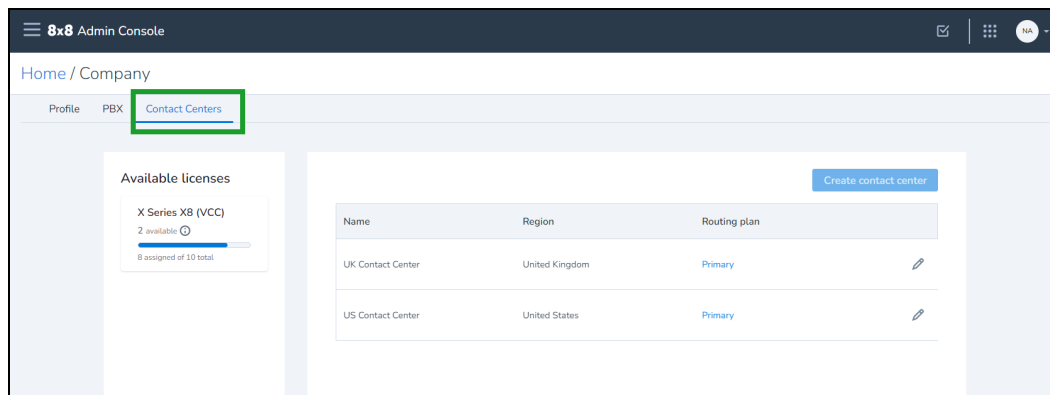
- The VCC Channels page is now nested in the Phone numbers page: To access the list of contact center voice channels, from **Home**, go to **Phone Number** page and select

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Contact Center Voice for filtering.

With support for multiple contact centers, we are introducing the following enhancements:

When you select to view Contact Center details, the side panel shows the following enhancements:

- Contact Center ID (i.e. Tenant ID) is shown

- PBX name is shown in the region field

- Extra voice ports section clarified and only shown if customer has voice ports licenses

- License count warnings clarified
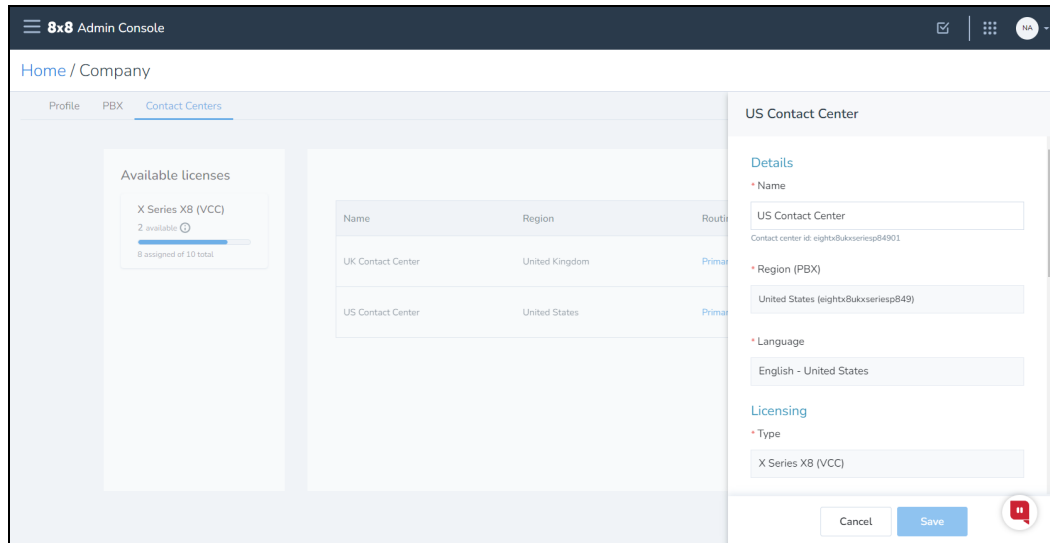
Contact Center name is shown in more places:

- On assigned licenses in the Licenses page

- On the Site selector in the User create page

RBAC scoping for Storage roles allows restriction to both Sites and Contact Centers (Which sites and which contact center does the admin need access?)

- Existing "Storage Admin" scopes will be converted to the new scopes

Introducing Work apps settings for IT admins

In this release, we are introducing options to IT admins to allow or prevent access to certain settings for end-users. For example, end-users can enable built-in call controls. Beginning this release, IT-admins can control this setting from Admin Console for all end-users. If required, they can disable end-users from making changes to this setting. This offers admins granular control to define default values for some settings for all end-users in your organization, check which settings can be further altered by each user, or prevent them from making any changes.

Admins can now manage the following Work app default settings:

- Enable built-in call controls: Allows integrated call control settings for specific headsets.

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- Enable call control window: Allows you to access the floating call control window when the app is not in focus.

- Call info pop-up: Allows you to quickly view details about the caller and prepare for the caller for a better customer experience.

- Set status away: Allows you to set your status to automatically display as Away after a period of time.

Additionally, with the ability to lock these settings, admins can prevent end-users from changing these settings.
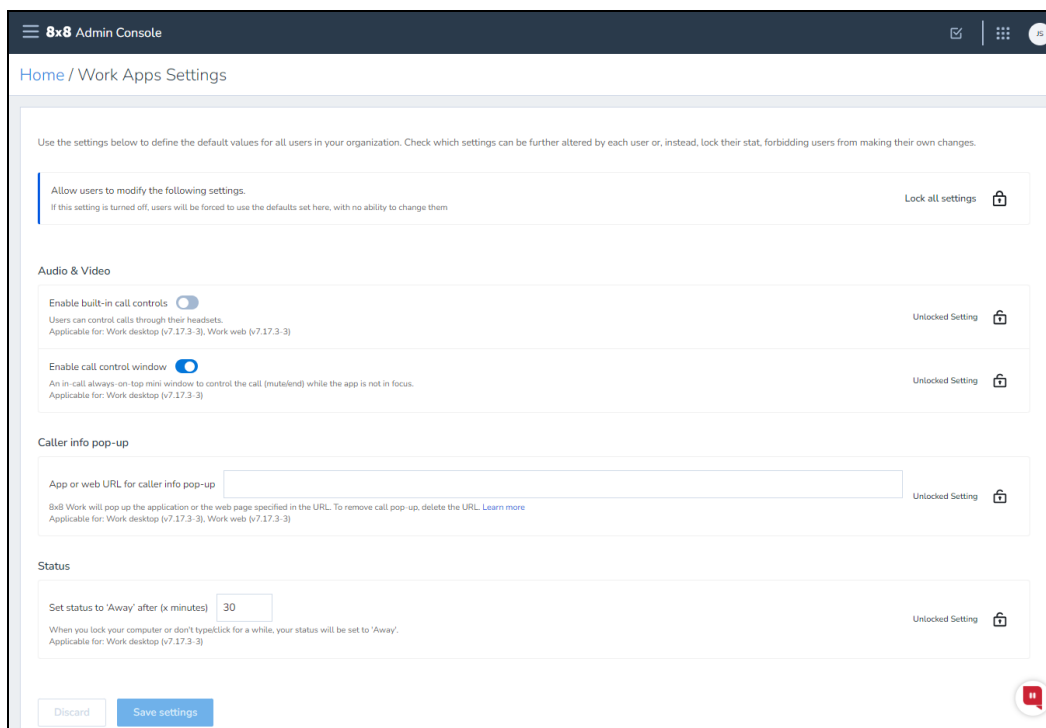
In the RBAC roles, the Super Admin and Company Admin role permissions now include Work app settings.

EOL warning message for SWB Pro

With the scheduled end of support and end of life of Switchboard Pro, we are making some changes to the related admin settings. In this release, we will add alerts to admins about the upcoming end of support in the screens relevant to the Switchboard Pro settings.

Nomadic 911 enhancements

- Removal of "None" address option for Service Location when ERS enabled

- Prevent enable of ERS when "None" is set as the Emergency Address

- Nomadic 911 home page icon/menu item visibility restricted to company settings permission

- User report includes column for ERS Enabled

Other Enhancements

- Number claiming for Puerto Rico now allows for both area codes (939 & 787)

- Modified approach to selecting BMW group administrators: Prior to this release, while adding BMW group admins, they had to be a member of the BMW group. Now, we have removed the limitation allowing you to simply search for any user and add them to the BMW group admin. If the user selected does not have the right permissions, you will be warned about it so you can resolve the permissions before saving the group admin role.

- SRTP toggle is shown for ATA devices that support it in User create/edit page.

- Label change for Quality Management and Speech Analytics for UC to Conversation IQ to align with marketing terminology

In this release of 8x8 Admin Console, we have introduced the following enhancements:

- Adding configuration changes related to Switchboard Pro EoL

- Enhanced settings for SRTP support

- Enhanced Company page

- Introducing new options for Yealink W70B based DECT devices

- Resolving a functionality issue in Auto Attendants

Adding configuration changes related to Switchboard Pro EoL

As you are aware, 8x8 is preparing to EoL Switchboard Pro and replace it with 8x8 . To facilitate this effort, we are making some changes in the 8x8 Admin Console.

- For new 8x8 customers, the Switchboard Pro section in user settings will be hidden completely.

- Existing Switchboard Pro customers will continue to be able to provision new Switchboard users until Switchboard EoL.
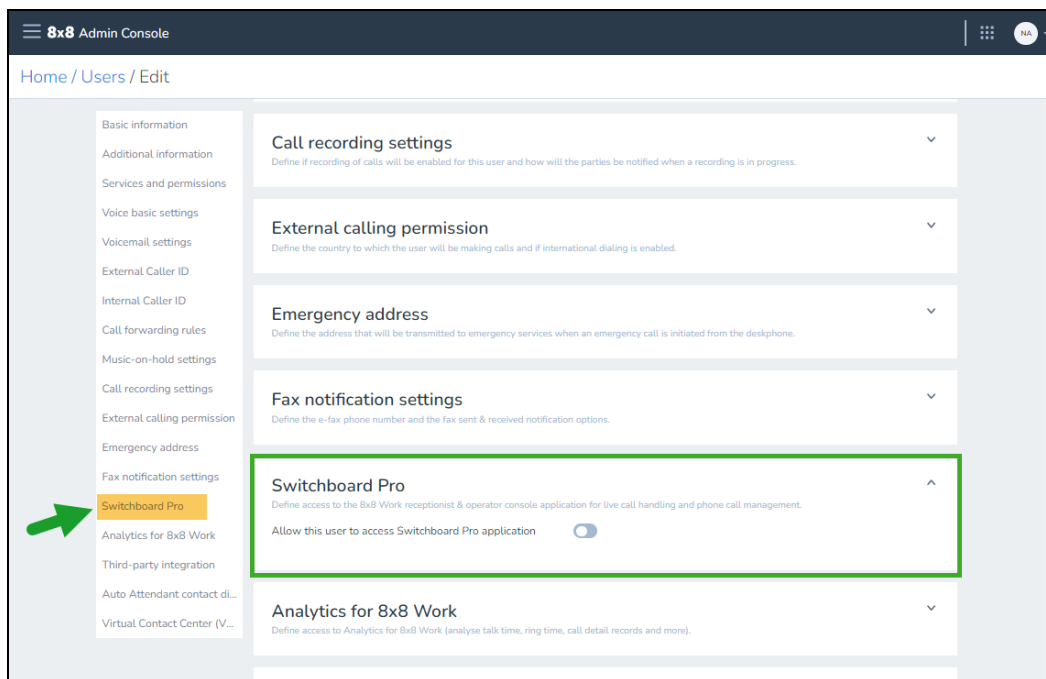
Enhanced settings for Secure Real-time Protocol support

Secure Real-time Transfer Protocol (SRTP) is a standard protocol for securing VoIP traffic. SRTP which is intended to provide encryption, message authentication and integrity, and protection, is enabled by default for all devices. Disabling TLS/SRTP

switches the endpoints over to User Datagram Protocol (UDP) and Real-time Transport Protocol (RTP).

Prior to this release, the setting to enable or disable SRTP for a device was available for all devices even when the devices did not support SRTP. In this release, we have enhanced this setting to show only for devices that support SRTP.

To enable SRTP for an endpoint:

1. While creating or editing a user, go to **Home > Users > Voice Basic Settings**.

2. In the **Device model** option, select a device such as Polycom VVX 450.

3. Toggle on **Enable Secure Real-time Protocol** and save the changes.

> **Note**: If you select a device that does not support SRTP, this setting will be hidden.

Enhanced Company page

In this release, we have enhanced the Company page by grouping the PBX details in a separate tab. The Company page now has two tabs:

- **Profile**: View a summary of the phone system including information about the number of sites, number of PBXs, dial plan, and more.
- **PBX**: Review the list of PBXs assigned. Select a PBX to view the details such as the country it is assigned to, dial plan, language for prompts and email notifications, and time zone.

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Introducing new options for Yealink W70B based DECT devices

We are introducing a new set of DECT devices based around the Yealink W70B base station. This base station supports RT30 repeaters which help improve call reception. We support two models of handset:
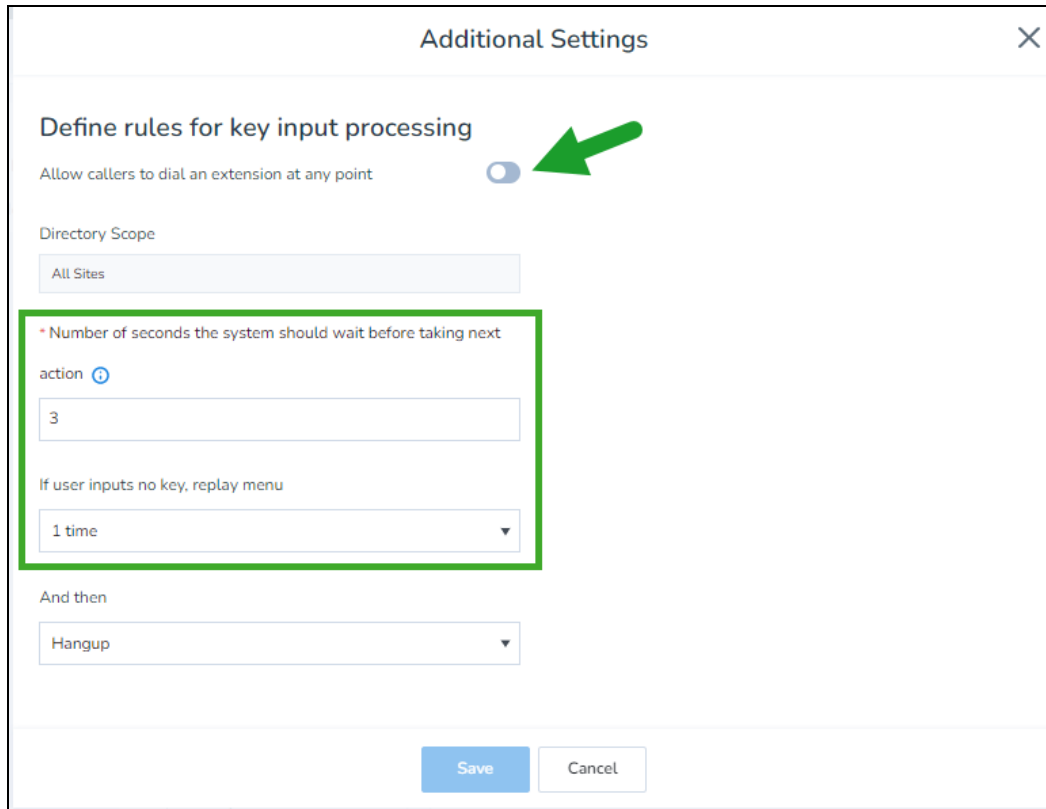
- Yealink W56H is a regular handset for the W70B DECT base station; available as a bundle W56P.
- Yealink W59R is a ruggedized handset for theW70B DECT base station, available as a bundle W59P.

In 8x8 Admin Console, under user voice basic settings, select the handset and then the base while assigning a device to users.

Resolving a functionality issue in Auto Attendants

While setting up a menu in an auto attendant, where customers can dial DTMF keystrokes to select a menu item, some of the additional settings for the menu were ignored unless the option to allow callers to dial an extension at any point was enabled. Prior to this release, the option to set a duration the system should wait before taking next action and the option to replay the menu if the user fails to input a key were ignored. This dependency has been removed in this release and the settings are honored even

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when callers are not allowed to dial an extension at any point.

We have introduced the following feature enhancements and changes to the product in this release:

- Improvements to license management
- Revised labelling of Identity Management
- Ability to configure User Provisioning independent of SSO

Improvements to license management

To facilitate better experience with 8x8 billing, we are introducing improvements to the license management page in 8x8 Admin Console. We have reorganized the license list

from a flat list to a three-level structure. Licenses are grouped by:

- License type
- License country
- Detailed side panel

The details side panel displays:

- License IDs
- Who or what each license is assigned to
- The service address associated with each license

Additionally, we allow:

- Filtering by country
- Searching by license ID
- Filtering by license status (assigned/unassigned/suspended)
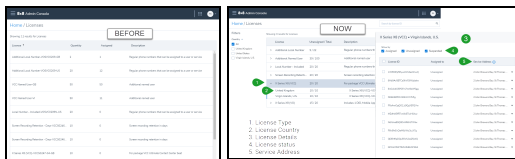
Ability to update the service address of unassigned licenses

Each license is associated with a service address based on the sales order location. Let's say your company orders licenses in bulk from the headquarters (NewYork) location, but then distributes it to your branch offices in Seattle, Delaware, and Washington. The service address of the assigned licenses get updated while the unassigned licenses remain bound to New York. With the varying state taxes in the US, the amount billed for unassigned licenses may not be accurate. To resolve this issue, in this release, we are introducing the ability to manually update service addresses for unassigned licenses as well.

To manually updated the service address of unassigned licenses:

1. Go to **Licenses**.
2. Select a license type and expand the countries the license is available to.

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3. Select a country to view the license details panel.

4. Unselect the filters **Assigned** and **Suspended** to view just the unassigned licenses.

> **Note**: By default, you can view licenses that are assigned, unassigned, and suspended.

5. From this list, in the service address column, select the site address to associate the license to.

6. To update the service address for multiple licenses, simply select the desired licenses and choose a service address from the available service address options.

7. Notice the unsaved changes link at the top of the list. Click to view a summary of the address changes including the previous address and the newly opted address for each license.

8. Click **Save** to save all the address changes.

These service address changes will reflect immediately in the licenses list in 8x8 Admin Console, while it takes around 15 minutes to cascade to the 8x8 Billing portal.

Learn more about license management.

Revised labelling

The Identity Management icon in the home page is now relabelled as **Identity and Security** to accurately represent the functionality changes.
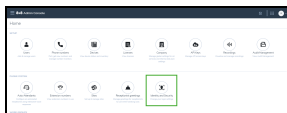
Ability to configure user provisioning independent of SSO

User provisioning integration allows you to automate employee onboarding & offboarding by having the users in your enterprise directory synchronised into 8x8 Admin Console. Until now, configuration of User Provisioning (aka SCIM) Integration used to be tied into configuration of SSO integration. This worked well if the same identity provider was used for both SSO and user provisioning. This was not ideal for customers wanting different Identity providers for the two integrations or simply wanting to disable SCIM without interrupting SSO. We have now decoupled the two and introduced the ability to configure user provisioning independently.

To configure:

1. Go to **Identity and Security**.

2. Under **User Provisioning Integration** settings, select the desired Identity Provider and add the relevant information.

3. Further, under **Advanced settings**, select to retrieve only the users created by your Identity Provider or retrieve all users.
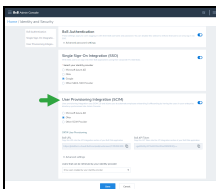
Additionally, we have reorganized the information as follows:

- 8x8 authentication and SSO authentication are now grouped separately
- Advanced password settings are grouped under the 8x8 authentication box

Inability to disable authentication settings

To prevent any unintended disabling of both 8x8 authentication and SSO settings, we now disable the option to toggle off the remaining option. Let's say you have enabled both authentication options, you disable the 8x8 authentication option. Now if you try to disable the SSO settings, the toggle is greyed out preventing you from turning off this option thereby retaining the settings for at least one mode of authentication.

User retrieval in user provisioning

Previously, for user provisioning, you were limited to retrieving users created in the Identity Provider such as Okta. If you created users in 8x8 Admin Console, you could not retrieve them in Okta. We have now introduced the ability to retrieve:

- All users
- Only users created by the identity provider

If you select **All users**, you can retrieve users created in the 8x8 Admin Console along with users created in the Identity Provider thereby allowing the Identity Provider to take control of the user profile if the login IDs map.

We have introduced the following feature enhancements and changes to the product in this release:

Introducing 8x8 Frontdesk

In this release, we are introducing settings to enable 8x8 Frontdesk, a flexible and easy-to-use desktop based application for 8x8 Work users. 8x8 Frontdesk offers better call management capabilities to front desk receptionists and improves their experience in handling a large volume of calls and needing to frequently transfer calls.

8x8 Frontdesk can be configured to suit varying business needs. Follow these instructions to enable 8x8 Frontdesk to a single user.
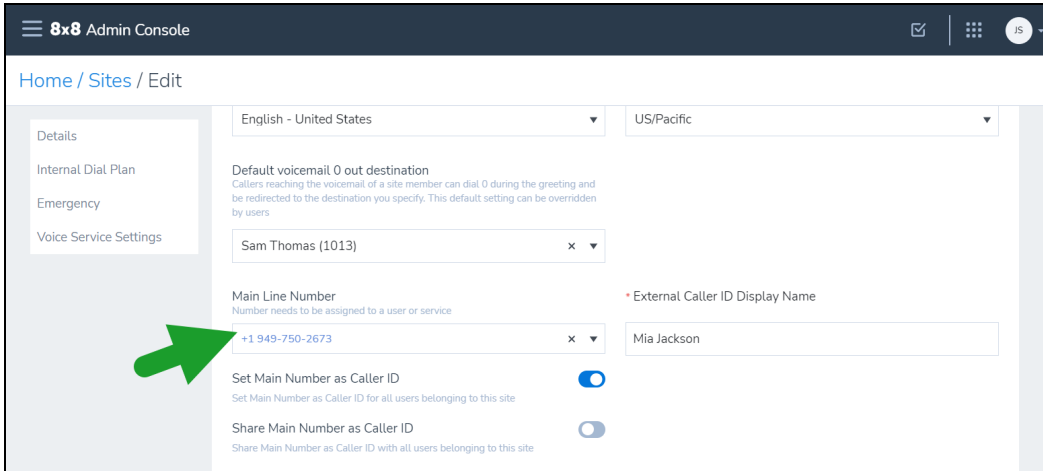
To enable 8x8 Frontdesk to a user:

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1. Log into the 8x8 Admin Console.

2. Go to **Users**.

3. Select to edit the desired user.

4. In the user settings, under **Services and permissions**, if the user is assigned with an X4 or higher license, toggle the **Enable Frontdesk** on.
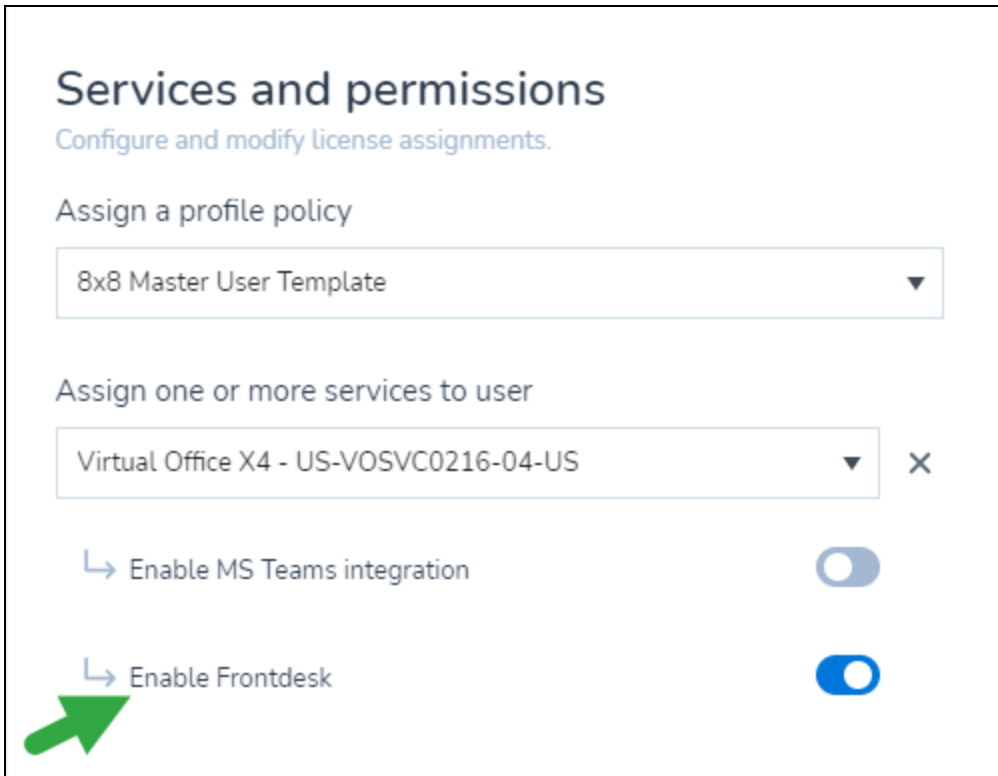
5. Proceed to assign a phone number to the user.

 As a next step, assign the receptionist phone number as the site main line number.

1. Go to **Sites**.

2. Select to edit the site to which the user belongs.

3. Under **Voice Service Settings**, select the phone number of the user enabled with Frontdesk in the previous step as the site Main line number. Users calling the site

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main line number reach the receptionist.

With this setup complete, the user enabled with 8x8 Frontdesk can now log into 8x8 Work for Desktop and access the Frontdesk functionality. For more information about 8x8 Frontdesk end user experience, check out the user guide. 8x8 Frontdesk can be configured to suit varying business needs. Learn more about the use cases.

Revised UI labels for an enhanced user experience

We have revised the following UI labels:

In the individual site edit, the field previously labeled as **Receptionist** is now revised to **Default voicemail 0 out destination** to correctly represent the intent of the field. Callers reaching the voicemail of a site member can dial 0 during the greeting and be redirected to the destination you specify. This default setting can be overridden by users.
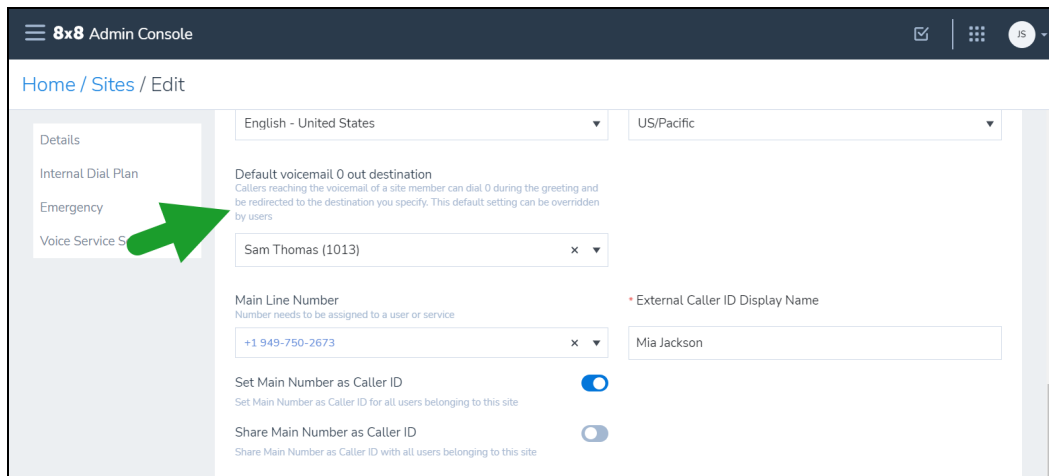
Switchboard greetings is now labelled as **Receptionist greetings**.
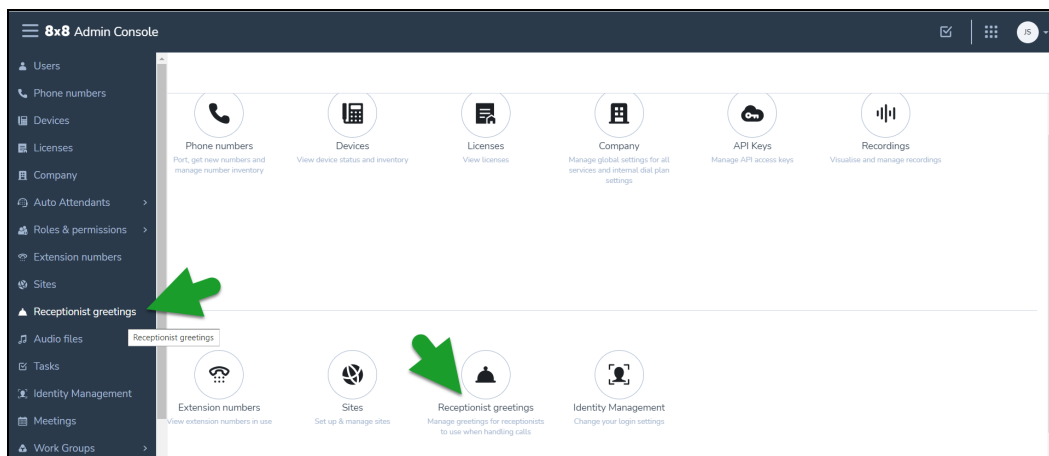
We have introduced the following feature enhancements, bug fixes, and changes to the product in this release:

- Introducing enhancements to custom dial plans

- Preparing for multiple PBX support

- Limiting transcription policy to Speech Analytics customers

- Switchboard label changes

- Introducing 8x8 Contact Center SMS channel provisioning improvements
- Bug fixes

Introducing enhancements to custom dial plans

To meet the dialing needs of our X Series customers, we have now introduced the ability to customize rule sets in custom dial plans.

- Previously, the custom dial plans allowed users to access emergency number dialing, domestic, and international dialing. In this release, we allow adding up to three custom rule sets to meet specific business needs.

- Prior to this release, custom dial plans created by 8x8 were available to all 8x8 X Series customers. With this release 8x8 can create private custom dial plans for specific customers who need them.

- Standard dial plans such as the North American Numbering plan can be duplicated and customized with additional custom rule sets to meet the individual business needs. These customized standard plans replace the predefined standard dial plans.

Preparing for multiple PBX support

For 8x8 customers migrating to X Series, our efforts are in full swing to support duplicate extension numbers on multiple PBXs. Duplicate extension numbers across multiple PBXs must be prefixed with PBX codes to become unique. For example, if your offices in Seattle and San Francisco use identical short digit codes, then you must use PBX codes while dialing to reach the desired destination. To reach the extension 1001 in the Seattle office with the PBX code 11, you need to dial 111001. To reach the extension 1001 in the San Francisco office with the PBX code 21, you need to dial 211001. In this release, if you have auto attendants and call forwarding destinations set to local extension numbers for ring groups, call queues, and users, they will route to the correct destination. In a future release, we will add support for PBX codes for remote auto attendant and call forwarding destinations. Until then, you will need to add remote destinations as custom numbers.

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Limiting transcription policy to Speech Analytics customers

The transcription policy icon in the home page of 8x8 Admin Console is now displayed to only 8x8 Speech Analytics customers.
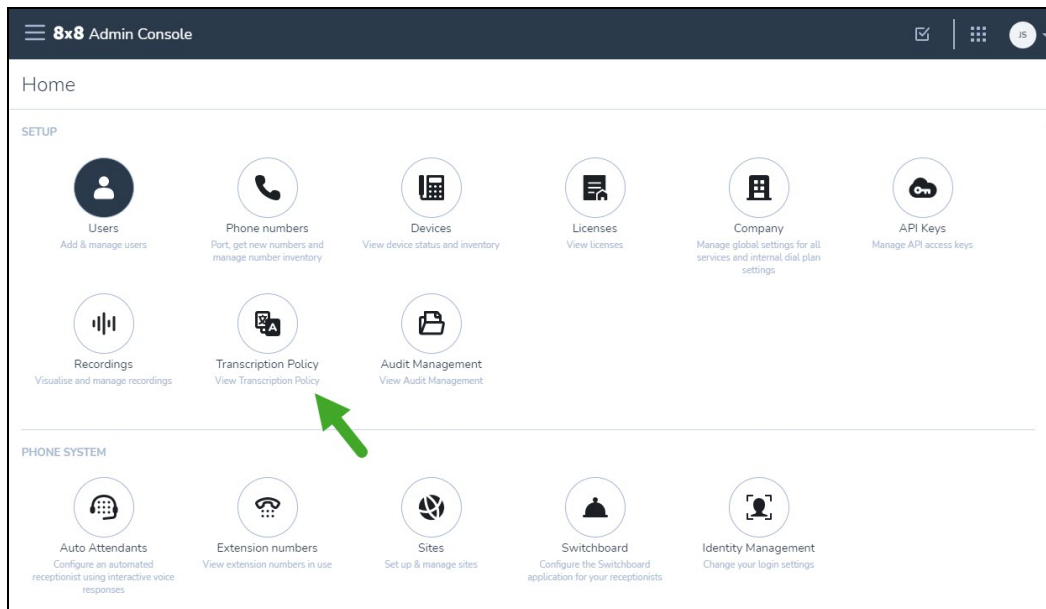
Switchboard label changes

The label for Switchboard in the Home page is now revised to **Switchboard Greetings** to clearly indicate the functionality offered via 8x8 Admin Console. When you navigate using this icon, you can set up switchboard greetings for receptionists. Additionally, we have added helpful tool tips on the screen while defining switchboard greetings.
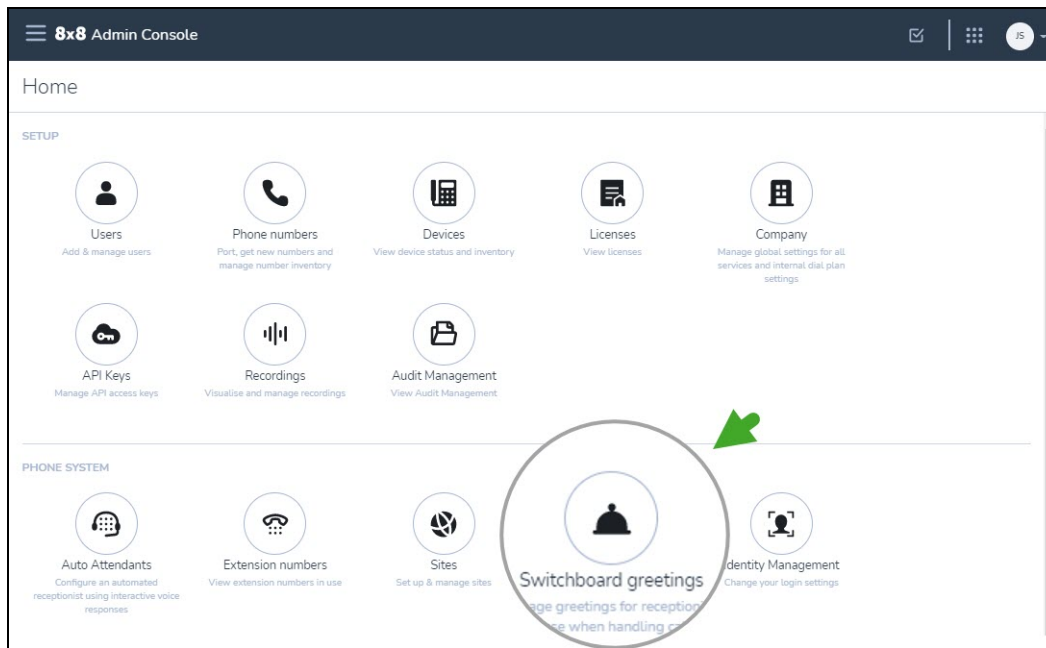
8x8 Contact Center SMS channel provisioning improvements

When a phone number is provisioned to an SMS channel in 8x8 Contact Center, it will now be marked as assigned to Virtual Contact Center SMS. This eliminates any possibilities of reassigning this phone number to another user or service accidentally. Previously, the phone number showed up as available in the list of phone numbers or reports in 8x8 Admin Console.

Go to **Home > Channels** to view the list of 8x8 Contact Center voice and SMS channels. When you generate the VCC Channels report, the report lists them as assigned.

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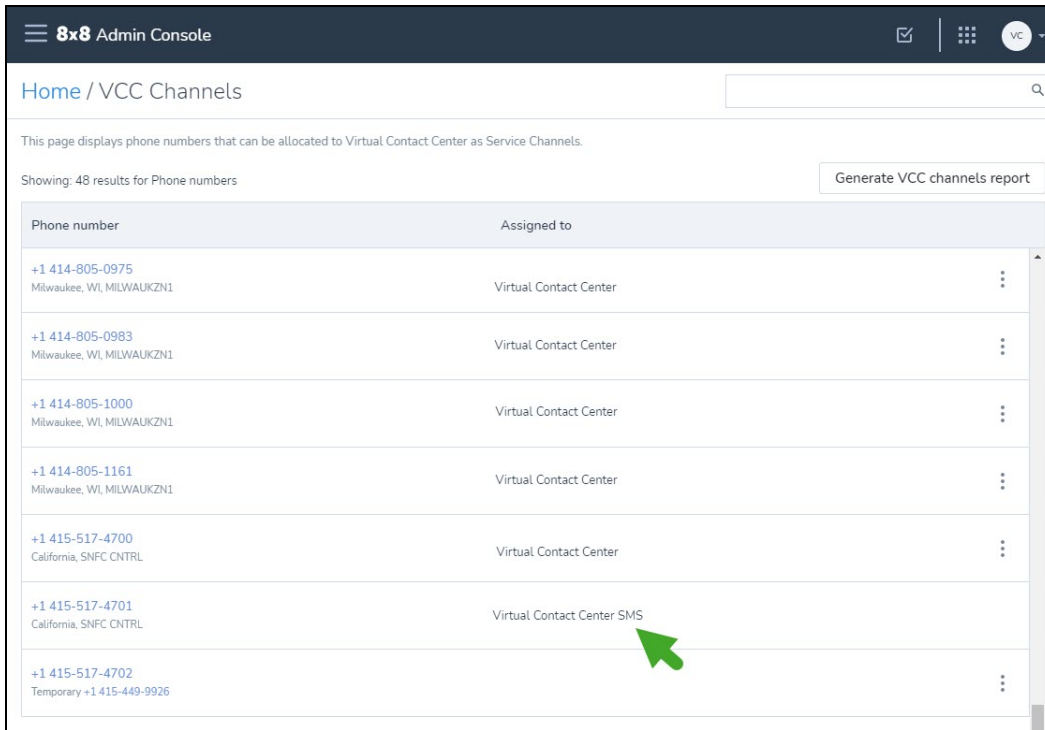
Bug fixes

Bug description	Resolution
Unable to add more than 25 members to a paging group	Fixed
Bulk editing a large number of users results in errors.	You can edit up to 120 users at a time.

We have introduced a new feature and a few feature enhancements in this release:

- Introducing 8x8 Password Policy
  - Features
  - Setting up 8x8 Password Policy
- Enhanced filtering of user reports

- Enhancements in Ring Groups

- Setting up a voicemail pin for users in bulk

Introducing 8x8 Password Policy

8x8 Password Policy **8x8 Authentication** defines a mechanism for securing user accounts. Administrators can define a set of password rules for enhanced security. The rules, set by administrators, encourage users (administrators, end-users, agents, and supervisors) to employ strong passwords, and ensure proper usage and account protection.

> **Note**: The **8x8 Authentication** applies to authentication via 8x8 login credentials only. They do not apply to Single Sign-on integration with Identity providers such as Okta or Microsoft Azure AD.

Features

- Timed password expiration forcing a periodic password change.

- Password history to remember a specified number of previously used passwords which prevents re-use.

- Minimum password length of 8-25 characters.

- Password complexity requirements, such as a mix of alphanumeric characters or a mix of upper and lowercase alpha with numeric characters. Special characters can be optional.

- Invalid login attempts locking users out temporarily.

- Account lockout for a specific time or until reset by the administrator in case of invalid login attempts.

- Configure Multi-Factor Authentication challenge frequency for all users. As an admin, you can set up to check MFA on a user device every selectable x days, up to 90 days.

Learn more about how to access and set 8x8 Password Policy.

Enhanced filtering of user reports

With new filters for user status, you can now filter deactivated users and view only the active users in the user report or vice versa.

1. From the menu, go to **Users**.

2. From the filters on the left, select **Deactivated** to view the list of deactivated users.

3. Click **Generate User Report** to download the filtered report.

4. To check if the user is active or deactivated, select **User.Deactivated** field to access the data in the report. In the report, the field indicates Y for deactivated or N for active.

Enhancements in ring groups

You can now set the number of cycles for ring groups from 1 to 20 times. This means calls directed to a ring group cycles N times before being forwarded to voicemail where N=1-20. Previously, you could set the number of cycles to 0 which forwarded the call to a selected destination such as voicemail without even cycling once. As this is not the intended behavior, we now allow a minimum value of 1 for Cycles.

> **Note**: If you have ring groups set to cycle 0 times, they will skip the cycle and forward calls to the desired destination. After this release, if you reset the value, you will be prevented from setting it back to 0.

We have fixed a label and enhanced the user experience while defining or editing ring groups. One of the External caller ID options - **Ring Group Name and Dialed Number**, is now correctly labeled to show the ring group name (Sales team) and the number dialed by the caller (1-888-334-3222) which may or may not be the ring group number. This contrasts with the option - **Ring Group Name and Ring Group Extension**, which always displays the ring group extension and not the originally dialed number.

Setting up a voicemail pin for users in bulk

While editing user settings in bulk, you are allowed to set a voicemail pin for multiple users at once. The voicemail pin authenticates users to listen to their voicemails. This setting had an erroneous behavior previously which is now fixed.
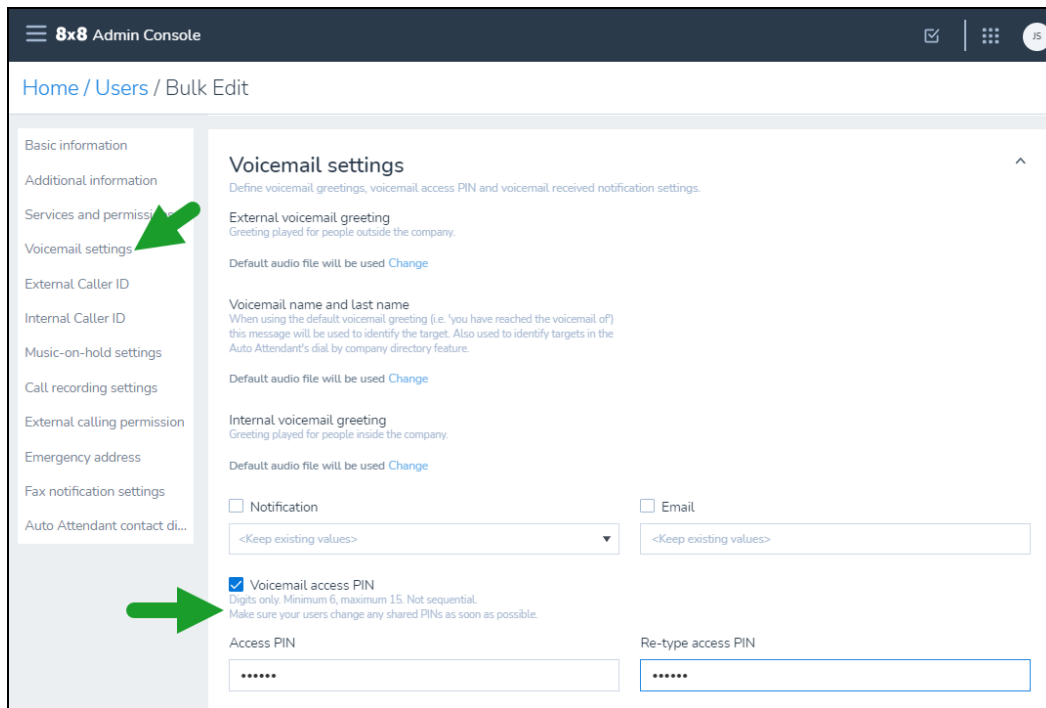
We have introduced the following feature enhancements in this release:

Ability to link Switchboard Pro greetings to phone numbers

In this release, you can link Switchboard Pro greetings to phone numbers rather than users. Greetings are short text messages that are associated with a destination phone number. When a call comes in to that number, the greeting text pops up on Switchboard Pro so that the Receptionist can greet the caller appropriately before directing the call to the intended user or department. We have also introduced the option to associate the greeting with a site so that the directory listing seen by the Receptionist can be auto-filtered to entries from that site when a call comes in to that number. This helps in navigating the list quickly and identifying the contact.

To add a greeting to be accessed in Switchboard Pro:

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1. Log in to 8x8 Admin Console.

2. Go to **Home > Switchboard**.

3. Click **+ Add greeting**.

4. Select a phone number from the list of available numbers. The greeting will be linked to this phone number. When a call comes into this number, the receptionist can view this message and greet the caller appropriately.

5. Select a site to auto-filter the phone numbers in the contact directory to entries from that site so that the receptionist can quickly navigate through the filtered list and direct an incoming call. This is optional.

6. Add the greeting text. Click **Save**.

When an incoming call is received by a receptionist on the Switchboard Pro for this number, the greeting message pops allowing the receptionist to greet the caller appropriately.
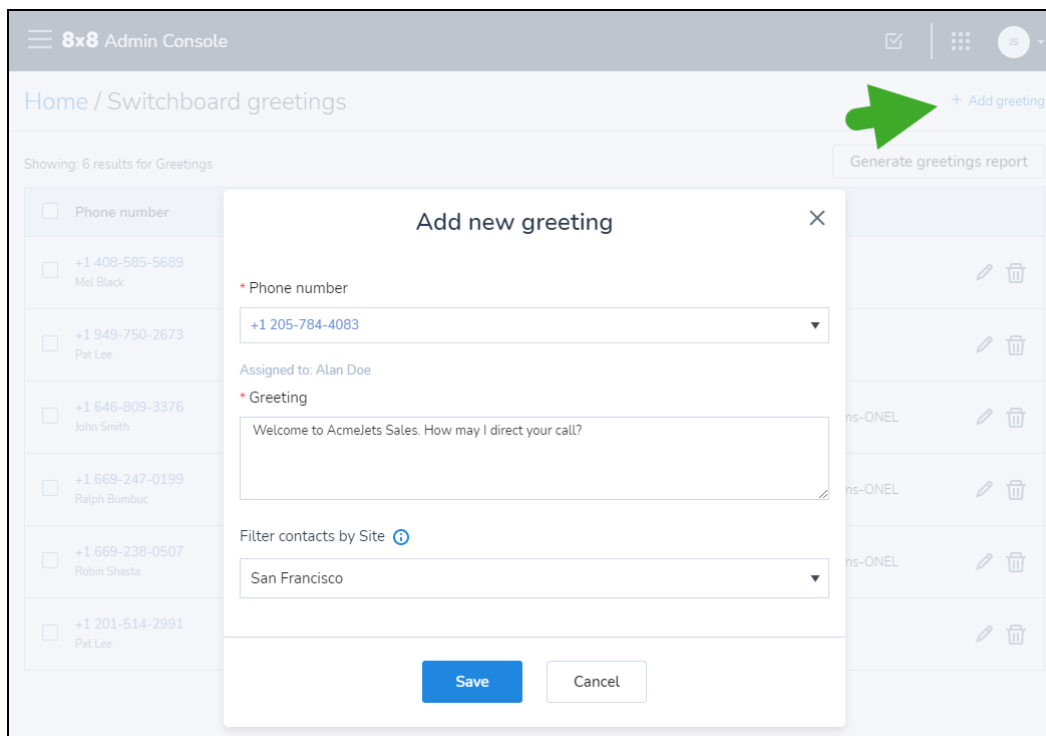
Click **Generate greetings report** to get a consolidated report of all greeting messages associated with phone numbers and corresponding users.
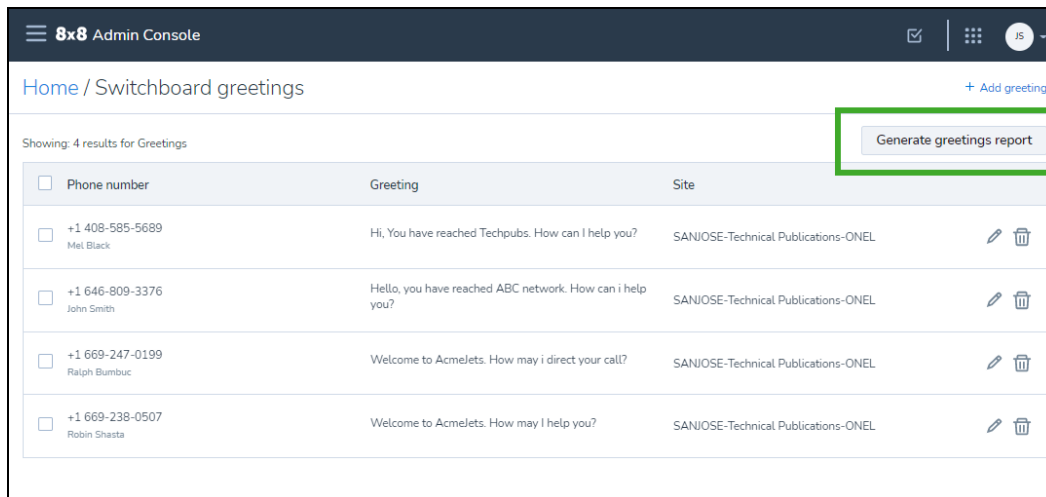
Known Issues

Switchboard Pro greetings do not automatically move from a temp number to ported number on post-port activation; The suggested workaround is to manually recreate greetings as required.

Enhancements to User Report

We have introduced two new fields to the user report.

- **Additional voice numbers**: Displays additional voice numbers assigned to a user apart from the primary number.
- **User: external identity provider**: Displays if the user was created from an external identity provider such as Okta or Azure. The value is empty if the user is created in 8x8 Admin Console.

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To access the user report, go to **Home > Users**. Click **Generate Users report**.
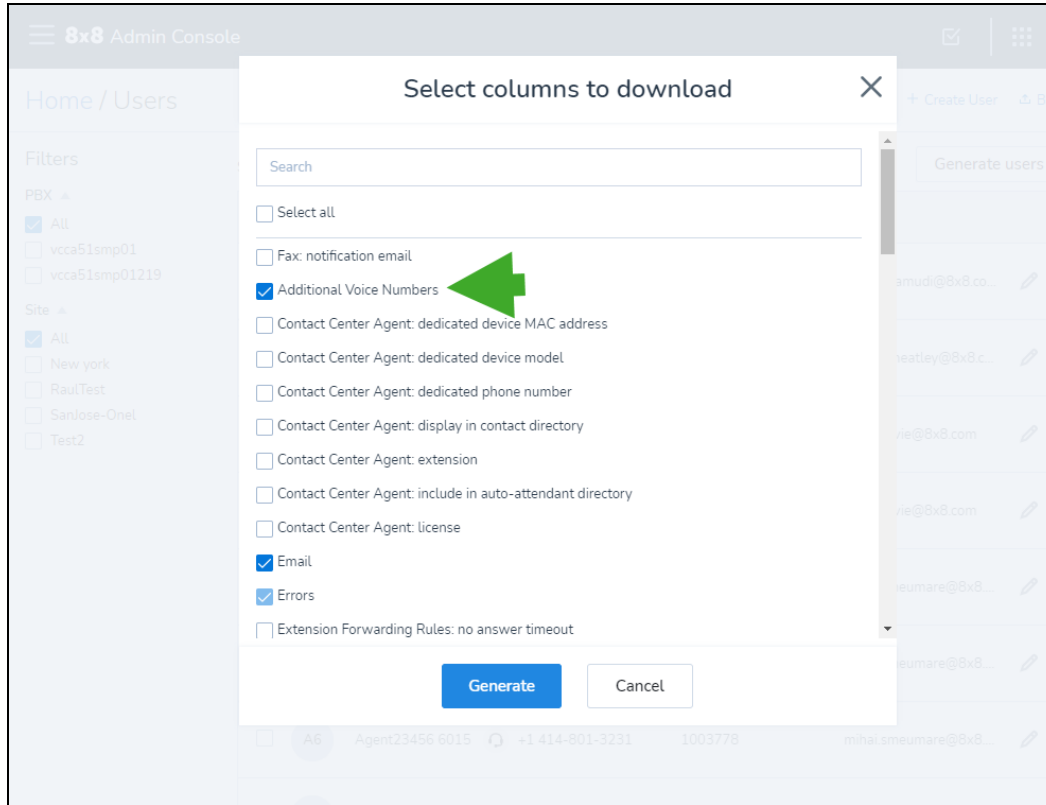
Other improvements

In the user record, the label for personal contact address is now labelled as Personal Address to clarify that this is not the emergency address.
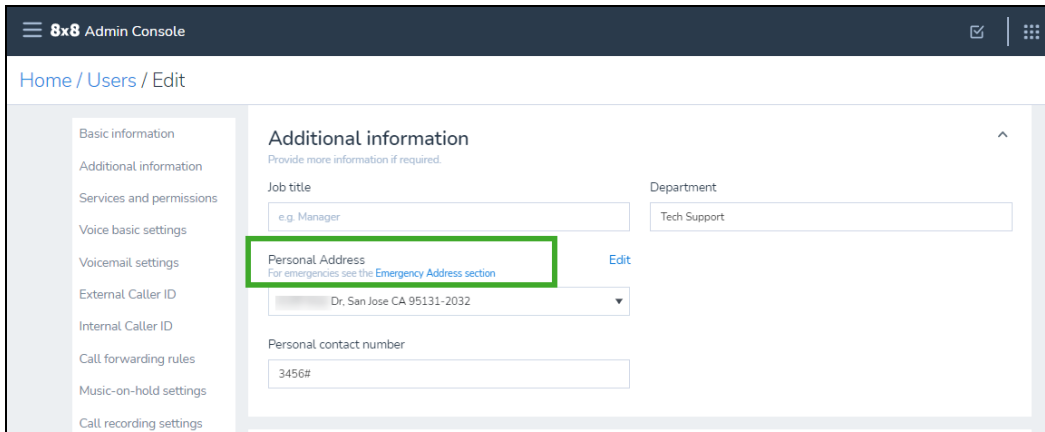
The user interface for filtering role assignments by user name is now updated allowing you to search and find the role assignments by user name. You can search by multiple names.
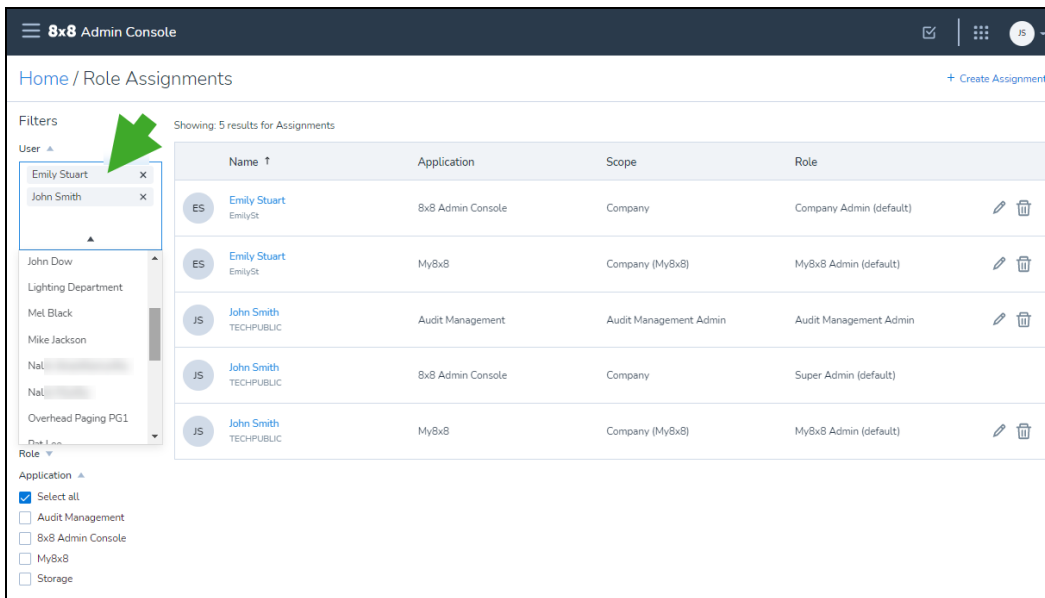
We are introducing the following enhancements and changes in the 8x8 Admin Console 1.26.2 release.

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Enabling users to select shared numbers in caller IDs

In this release, we are enabling users to select Call Queues, Ring Groups, and Sites as caller ID if they belong to the site and are a member of those groups.

Previously, you could share the site main number as the caller ID for all users across all sites. In this release, we have fine tuned it to be available to only users assigned to that site. If John is assigned to the New York site, the site main number for New York is available to be shared as the external caller ID for John. For each site, you can share the site main number as the caller ID.

To share the site main number as the caller ID:

1. Log into 8x8 Admin Console.

2. Go to **Sites**. Select to edit a site from the list.

3. Under the **Voice Service Settings**, enable **Share Main Number as Caller ID**.
   The site main number is shared for caller ID with all users belonging to the site.

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4. Save the settings.

In this release, we have added the capability to share the call queue and ring group phone numbers as external caller ID. This is available to only the members of the call queues or ring groups. If John is a member of Tier 1 Support call queue, the call queue number is shared as a caller ID for John. In responding to callers on this queue, John can set the call queue phone number to be his caller ID and further customize the display name in the caller ID. This helps customers in identifying the call source.

To share a call queue number for caller ID:

1. Log into 8x8 Admin Console.
2. From the menu, go to **Work Groups > Call Queues**.
3. Select to edit a call queue from the list.
4. In the **External Caller ID** section, enable the option to **Use Caller ID**.
5. Edit the display name as needed and save the settings.
   The shared number of work groups appear in the users' caller ID choices.

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6. Follow a similar procedure for ring groups.

Change notification

The Call Recordings page title is now changed from Call Recordings to Recordings. This
change is introduced in anticipation of the extended support to access chat recordings
in a later release.
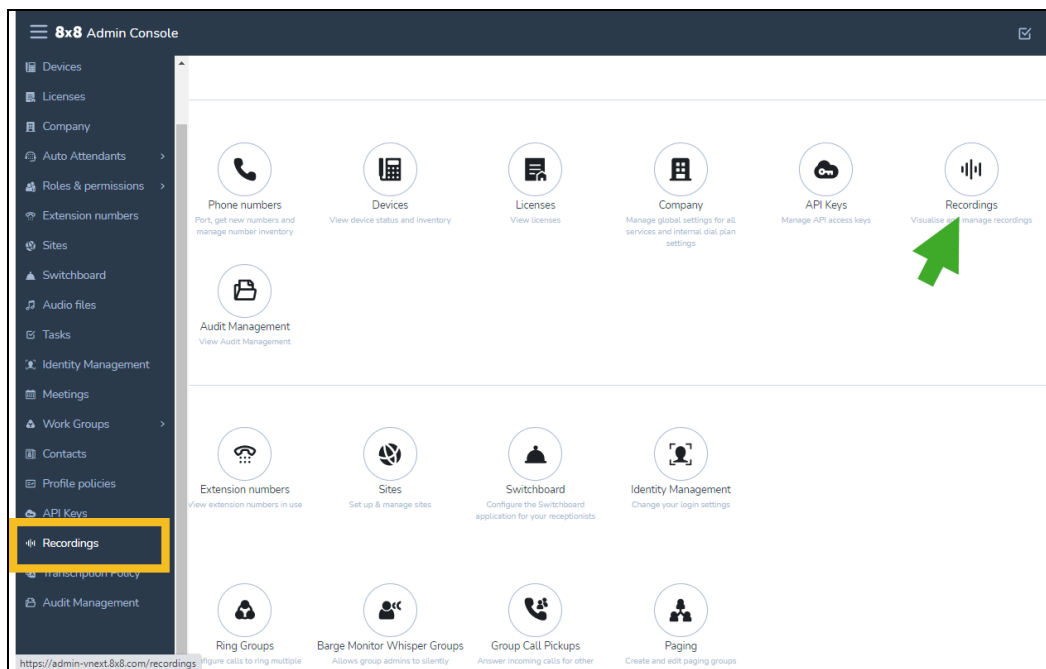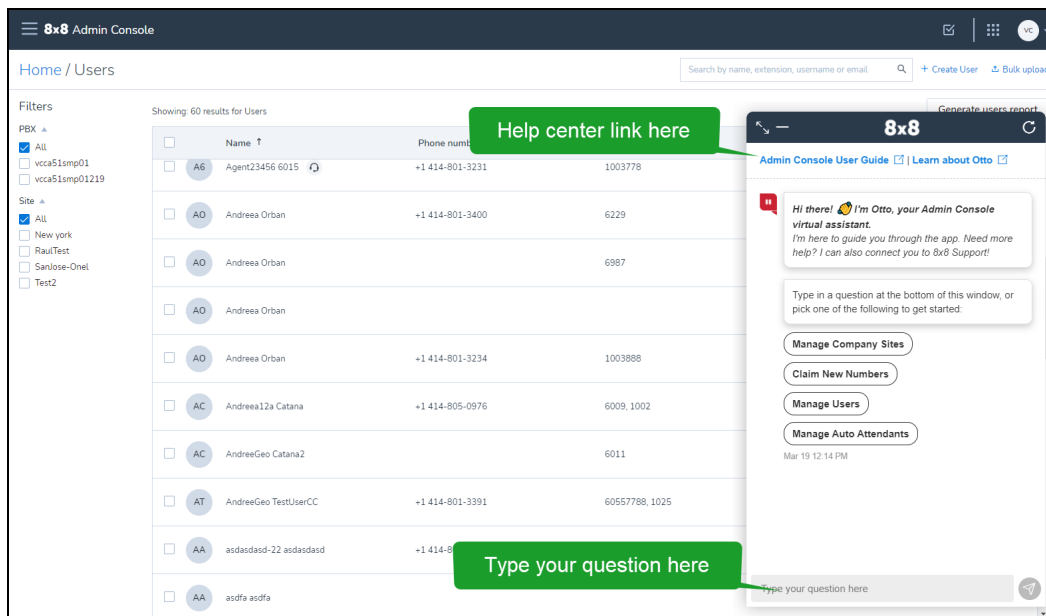
We are introducing the following enhancements and changes in the 8x8 Admin Console
1.25.5 release.

- Introducing Otto
- Ability to upload VCC users in bulk
- Ability to change phone and extension number of a VCC dedicated extension user
- Display current release of AC in the application
- Bug fixes

Otto, the chatbot for 8x8 Admin Console is here!

We have now introduced Otto , a chatbot designed to guide you through the 8x8 Admin Console setup and navigation. Whether you are setting up sites, adding users, or claiming phone numbers, if you need help, simply type your question, and Otto offers to walk you through the setup process or provides you with instructions to set up at your convenience. Otto is available at the bottom right corner of the page. Click to launch a session.

Note: The Help Center links available on the Home page previously are now embedded within the Otto launch interface. Click the **8x8 Admin Console user guide** link to navigate to the help center links for a deep-dive.

Ability to upload VCC users in bulk

If you are an 8x8 Contact Center customer on X Series, you will now be able to upload VCC users in bulk. In the user report you download or the template you upload, we have now added eight new columns to enable adding VCC users in bulk. Previously, you were limited to assigning a VCC license and defining the corresponding settings via the user interface per user. Now, you can add VCC licenses to users, set an extension number, add dedicated devices, select the agent to be included in the auto attendant, and more via the bulk upload template.

- The bulk upload settings mimic the settings available in the user interface
- The template does not offer a column to indicate the VCC dedicated extension. It is assumed automatically when a phone number and device are chosen.
- Extension numbers for agents are auto-generated if not provided.

To add VCC users in bulk:

1. Log into 8x8 Admin Console.
2. In the Bulk upload window, click **Download .CSV template**.
3. At the prompt, select the columns to download from the list.
4. To add VCC users, ensure to select the following columns:
   - **Contact Center Agent: license**
   - **Contact Center Agent: extension**
   - **Contact Center Agent: dedicated device model**
   - **Contact Center Agent: dedicated device MAC address**
   - **Contact Center Agent: dedicated phone number**
   - **Contact Center Agent: display in contact directory**
   - **Contact Center Agent: include in auto-attendant**

directory

- **Contact Center Agent: send agent welcome email**

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5. Click **Download template**. The template file is automatically downloaded to your local disk.

6. Open the template using Microsoft Excel. Click here for template field descriptions.

7. Add valid data and save.

8. Go back to 8x8 Admin Console and in the bulk upload window, drag and drop your **.csv or click to browse.**

9. Upload the CSV file you just saved and click **Validate**.

   The rows are validated top to bottom. A green bar flashes in the header bar if the validation process goes well.

10. After validation, click **Bulk upload** again, upload your validated CSV file and click **Validate and Process**. The uploading process starts and the rows are processed. The new users appear in the Users page. You can check out the list of activities by clicking on the top header or by going to the Tasks page from the main menu.

> **Note**: Bulk edit via CSV continues to be limited availability.

> **Caution**: Do not edit a user's existing assignment of dedicated VCC extension.
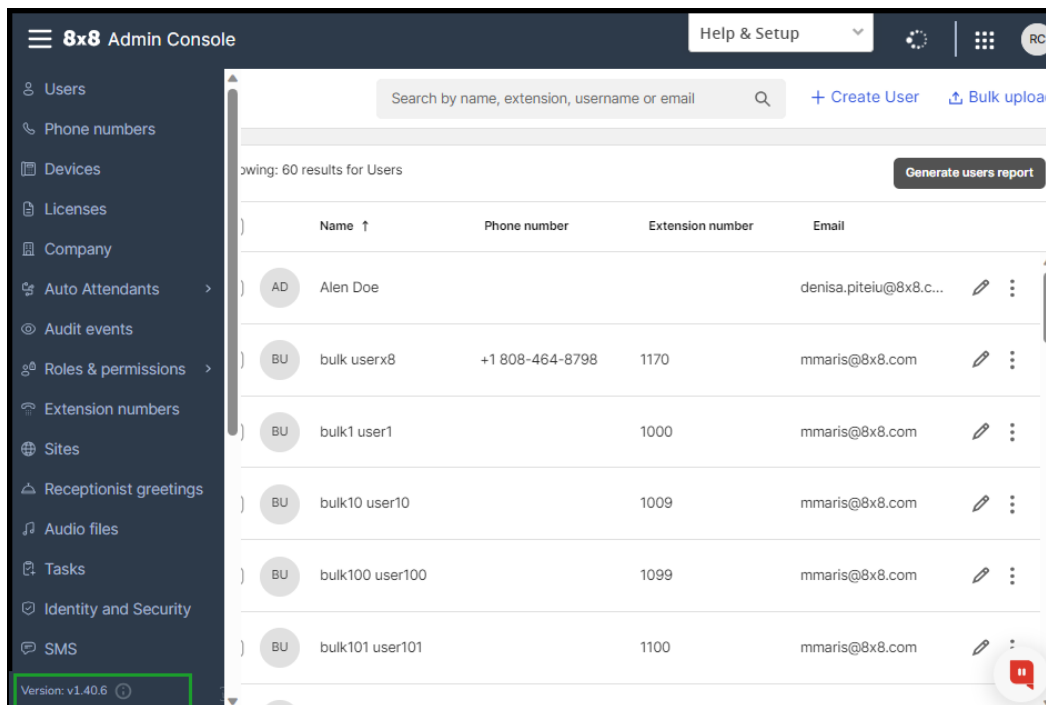
Ability to change phone and extension number of users with VCC dedicated extension

In the previous release, selected X Series users using 8x8 Contact Centerservices were given the option to enable their 8x8 Work extension to be dedicated to 8x8 Contact

Center. After enabling a dedicated VCC extension for a user, the phone number and extension were locked and could not be changed. In this release, we have resolved this issue. You can now edit the phone number and extension number associated with the user.

Check out the 8x8 Admin Console version

Wondering which version of the 8x8 Admin Console application you are accessing? Simply click to open the main menu and find the version number at the bottom of the menu.

Bug Fixes

The role assignment page did not retain user name changes previously. The issue is now fixed.

We are introducing the following enhancements and changes in the 8x8 Admin Console 1.25.5 release.

- Ability to dedicate an extension to contact center
  - Limited availability
  - Enable a user with a dedicated VCC extension
- Ability to handle variable length of a phone extension

Ability to dedicate an 8x8 Work extension to Contact Center

Selected X Series users using 8x8 Contact Center services can now enable their 8x8 Work extension to be dedicated to 8x8 Contact Center. This feature is currently in limited availability. Previously, you had to limit a user to a dedicated VCC extension using a locked down desk phone or by assigning two separate extensions—one for 8x8 Work and another extension dedicated to VCC. In this release, we are introducing the ability to dedicate an8x8 Work extension to 8x8 Contact Center calls. Agents who are dedicated to handling call traffic pertaining to the contact center will not be interrupted by any other call traffic. This dedicated VCC extension only offers inbound queued calls or direct agent calls from the contact center. Agents can use the 8x8 Work for Desktopapp or a desk phone to handle these calls.

Limited Availability

This enhancement is currently available to a limited number of X series customers. An enhanced version of this feature will be available to the broader audience in a future release.

Features

- Ability to dedicate an 8x8 Work extension to process call traffic from 8x8 Contact Center
- Agents can use 8x8 Work for Desktopor a desk phone which are locked down to

8x8

handle inbound contact center call traffic

- The phone number assigned to the user functions as the agent channel DID
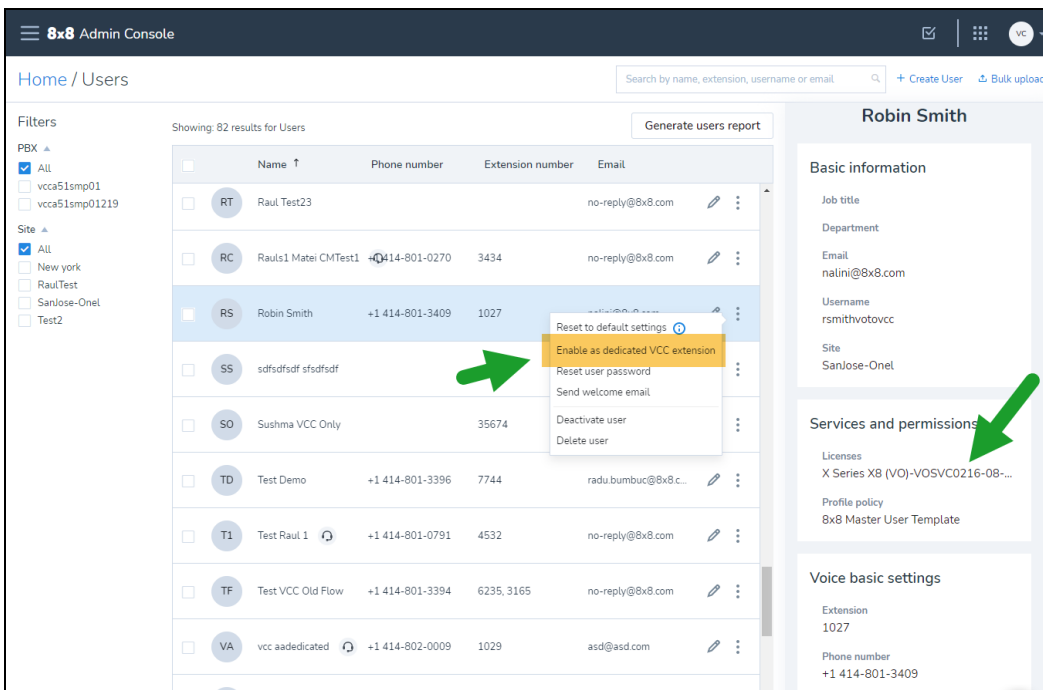
Enable a user with a dedicated VCC extension

1. Log into 8x8 Admin Console.

2. Select **Users** from the menu.

3. From the list of the users, select a user assigned with an 8x8 Work extension.

> **Note**: You must select a user assigned to a VCC-enabled site.

4. Click ⋮ and select **Enable as dedicated VCC extension** from the available options.

5. At the prompt that alerts you about the implications of this action, click **Continue**.

The selected user will be enabled with a dedicated VCC extension. The user can then use the extension to handle 8x8 Contact Centercalls with a desk phone or the 8x8

Work for Desktop app.

> **Note**: In the users list, users assigned with dedicated VCC extensions are marked with ⌒ icon.

6. From the application panel, navigate to 8x8 Configuration Manager.
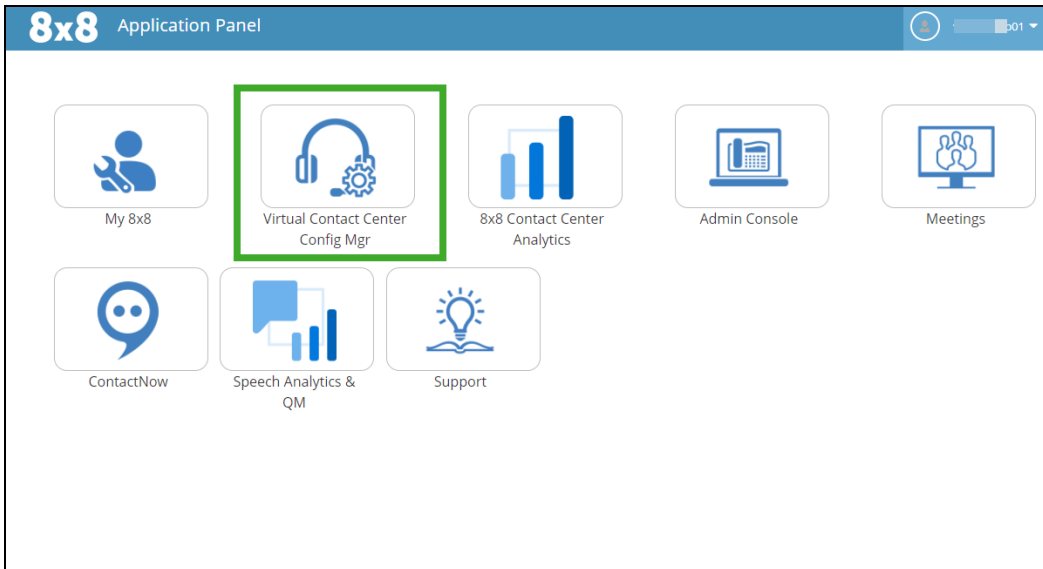
7. Go to **Users** from the menu and notice that enabling a user with a VCC dedicated extension has created a new user in 8x8 Contact Center. You are now ready to configure the agent.

8. From the menu, go to **Channels**, and notice a new channel now appears on the list. This is the phone number assigned to the user in 8x8 Admin Console.

Limitations and known issues

- After enabling a dedicated VCC extension for a user, the following setting is locked and cannot be changed:
  - Licenses

  To change the above setting, the admin must first disable the dedicated VCC extension, make the changes, then re-enable. This results in the agent being deleted and re-created in 8x8 Configuration Manager, they would then need to have their settings re-configured, be re-added to agent groups/ queues and their agent script re-linked.

- The action to enable a dedicated VCC extension is enabled even if a user is in a site that is not VCC-enabled. The attempt fails but shows an error message prompting you

8x8
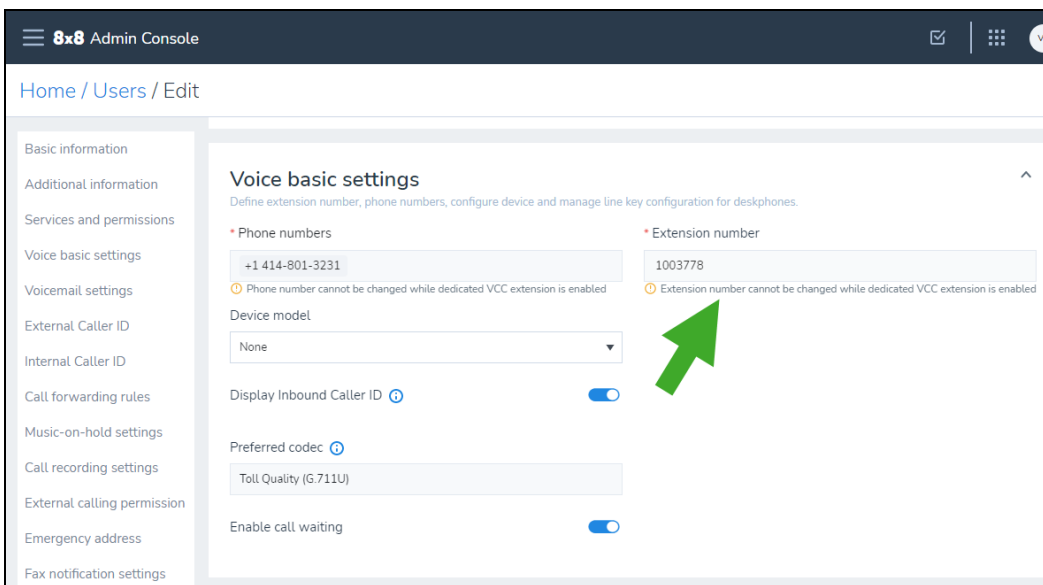
to retry. Please note that the user must be assigned to a site that is VCC enabled to complete the action successfully.

Handling length of variable extension

To ensure the length of an extension number complies with the extension length allowed by the chosen site dial plan, we now display a text alert when the extension exceeds the maximum allowed length. The text message alerts and allows you to resolve the issue instantly.

To view the text alert:

1. Log into 8x8 Admin Console. Go to **Users**.

2. Select to edit a user.

3. While creating or editing a user, under **Voice Basic Settings**, enter an extension number. If it exceeds the maximum length allowed by the site dial plan, a text message alerts you.

4. Edit the extension length to fit the maximum allowed by the site dial plan.

We are introducing the following enhancements and changes in the 8x8 Admin Console 1.25 release:

Removal of cost center assignment in 8x8 Admin Console

We have now removed the ability to assign users to cost centers in the user profile. This is now managed via 8x8 Community Portal. Learn more about cost center management.

Introducing the Audit Management Admin role

In the previous release, we introduced the Super Admin role which supersedes the permissions of the Company Admin role. This role extends privileges to manage sensitive data to other users. By default, this role is assigned to the primary admin of the PBX.

In this release, we are introducing a new admin role for audit management which allows you to audit chat conversations of all users. You can filter audit data by users, date range, keyword, attachments, and rooms. As a super admin, you can assign this role to users as needed.

> **Note**: Due to the sensitive nature of this role, exercise caution while assigning the role to users.

To view the permissions of the Audit Management Admin role:

1. Log into 8x8 Admin Console.
2. From the menu, go to **Roles and Permissions** > **Roles**.
3. In the list, notice the role for **Audit Management Admin**.
4. Click ⊙ to view the permissions assigned to this role. This role is assigned with audit management privileges only.

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To assign the Audit Management Admin role to a user:

1. From the menu, go to **Roles and Permissions** > **Assignments**.

2. Click **Create Assignment** and select a user to assign the Audit Management Admin role. Select the scope and click **Save**.

Access Audit Management

As an Audit Management Admin, you can audit chat conversations of users in your PBX. Let's say you wish to perform an audit for two of your users this past month, simply select the date range as **Last Month** and select **Author is**, and select the users from the list.

To perform audit management:

1. Log into 8x8 Admin Console.

2. From the menu, select **Audit Management**.

3. Select the desired filters from the following choices:

Filter	Description
Attachments	Select to audit chats based on attachments exchanged during

Filter	Description
	the conversation.
Author	Select to audit all users or specific users from the list.
Date range	Select the time period for audit. You can choose from predetermined date ranges or enter a custom date range.
Keyword	Select to filter the conversations based on specific keywords.
Room	Select to filter the conversations of specific rooms.

4. Click **Generate Archive** to begin retrieving.

5. Based on the volume of the data retrieved, it takes up to 24 hours.

6. Once complete, you will notice the status changes from **In progress** to **Completed**.

7. Click   to download the file from the archive.

> **Note**: These files are in JSON format. Use an approved e-discovery

Manage Call Recording Enhancement

The Call Recording feature has been enhanced to let you delete call recordings by filter and by bulk. You can delete as many recordings that you want to at once. You can also stop a deletion while it is in process for whatever reason. See the topic Manage Call Recording for details.

Bug Fix

We have now resolved an issue with 8x8 Auto Attendants. Previously, if the user failed to select a main menu option, the setting to route the call to a ring group or a call queue would automatically reset to direct the caller to the voicemail. We have now resolved this issue.

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We have introduced the following enhancements in the 8x8 Admin Console 1.24 release.

Ability to display external caller ID during emergency dialing

During emergency dialing, let's say your company wants to display the company name rather than the individual extension name, you now have the ability to set your external caller ID preferences company-wide.

Limited availability

This features is currently in limited availability. It is available in the US only.

To set up external caller ID to display during emergency dialling:

1. In the 8x8 Admin Console, go to **Company** from the menu.

2. In the **Emergency Display Name**, select **External Caller ID** from the available choices.

> **Note**: By default the Emergency Display Name is set to internal caller ID.

3. Save the preferences. The external caller ID display name set for each user is displayed during emergency dialing.

Ability to remove failed porting requests

Let's say your number porting request gets rejected. You may resubmit the request excluding a few numbers that you longer wish to port. Previously you could not remove those excluded numbers from your porting log. Now we have introduced an option to remove the failed porting requests.

To remove a failed porting request:

1. Go to **Phone numbers** from the menu.

2. In the filter, select to view the numbers which have failed to port.

3. From the list of number which have failed porting, select a number you no longer wish to port.

4. Click ⋮ and select **Remove porting request**.

5. At the prompt, confirm to remove the porting request. You are informed that the temporary number will be retained in your inventory as a claimed number.

Grouping compatible phone numbers during porting

When you submit a request to port a batch of phone numbers belonging to more than one service provider, the porting request will likely be rejected. To prevent porting failures, we now detect upfront if the phone numbers belong to different service providers and split them into compatible groups. Further, with your input, we will split the porting request into multiple requests based on the service provider. This allows you to avoid porting rejections as well as track the requests easily.

Let's say you submit phone numbers belonging to two different providers in the same porting request, you will be alerted that the porting request is not compatible and the phone numbers need to be split into compatible groups. With your permission and input, the phone numbers will then be split into compatible groups and submitted as two separate requests.

Introducing a new Super Admin role

In this release, we have introduced a new Super Admin role which supersedes the permissions of the Company Admin role. This new role is intended to extend privileges to manage sensitive data to other users. By default, this role is assigned to the primary admin of the PBX. In addition to the permissions assigned to the Company Admin role, this role has the key permission to access and manage sensitive data:

- Cloud storage API: Access recordings of calls, meetings, and voicemails of all users in the company.

- Messaging audit: Access chat conversations of all users via the product interface and the API.

As a Super Admin, you can extend permissions to manage sensitive data to other users in the company. To access sensitive data, you must grant the relevant permissions through a custom role.
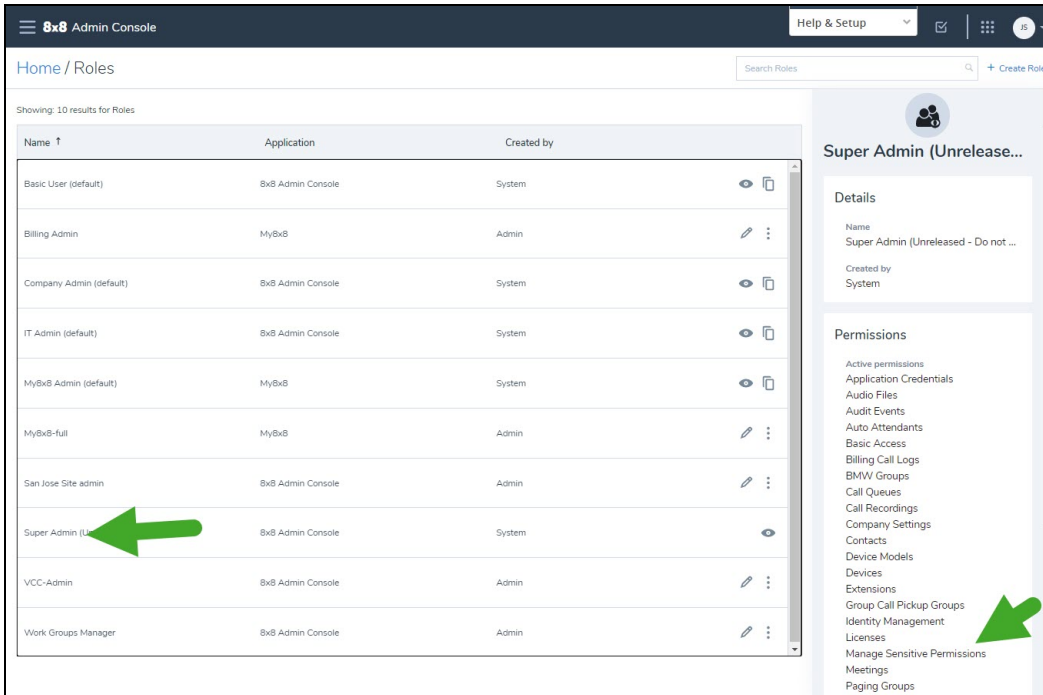
> **Note**: The permission to manage sensitive data does not allow access to sensitive data unless specifically authorised.

To view the permissions of the Super Admin role:

1. Log into 8x8 Admin Console.
2. From the menu, go to **Roles and Permissions > Roles**.
3. In the list, notice the new role for Super Admin.

4. Click [icon] to view all the permissions assigned to this role.

> **Note**: You are not allowed to duplicate this role.

To create a custom role to access sensitive data:

1. Click **Create Role**.

2. Add an appropriate name.

3. Enable permissions to **Messaging audit** and **Cloud storage API**.

4. Save the role. Please make sure you assign this role to a user who is qualified to access sensitive data.

Introducing global API authentication

8x8 is introducing a mechanism to generate an API key and use it to authenticate into the 8x8 API gateway. This allows you to access many of the developer-facing 8x8 APIs. As a developer, you may want to create one or multiple applications interacting with one or more 8x8 APIs. In the 8x8 Admin Console, you can now create an app which in turn generates an API key and a secret code. Use this key to further authenticate into the specific APIs selected.

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> **Note**: We currently support authentication for Cloud Storage API and Chat API.

To create an app for the API:

1. From the menu, go to **API Keys**.

2. Click **Create app**.

3. Enter a name for the app.

4. Select the API/s from the list of available APIs.

5. Save the app. This automatically generates the API key.

To fetch the API key for the app:

1. Go to the list of apps listed under the API Keys.

2. Select to edit the app you just created.

3. Note that the API key and the secret code are now visible in the protective mode.

4. Click 👁 to view the key and the code.

5. Copy and store the key for authentication.

To revoke access to any of the supported 8x8 API:

You can simply delete the app to remove access to the API. Deleting the app revokes the API key and blocks access to the APIs selected in the app.

Next step

After fetching the API key, go to https://developer.8x8.com, select the API you wish to use, and use the key to authenticate the API calls.

We have introduced the following enhancements in the 8x8 Admin Console 1.23 release. These enhancements are directed to 8x8 classic customers who are migrating to the X Series platform:

Support for custom fields for migrated customers

Classic 8x8 customers who are being migrated to the X series platform are now able to access the custom fields in the contact directory. Let's say you have previously defined custom fields such as Employee ID or Company Division in Account Manager, they are now visible as Custom Field 1 and Custom Field 2 in your new 8x8 Admin Console.

Limited availability

As an 8x8 customer, you will have custom fields enabled if:

- You are being migrated from Classic to X Series (i.e. not available for native X Series customers)
- You have used custom fields for the user profiles in Account Manager (i.e. have data already)

Features

- All customers see a refined layout of the User details page.
- The Basic information section is split into Basic information and Additional information.
- Basic information holds mandatory fields and key functional fields.
- Additional information holds contact info such as address, job title, department and, if enabled, custom fields.
- Three custom fields are shown in the Additional information section.

Limitations

- Custom fields cannot be turned on or off individually
- Custom field names and types cannot be modified
- Existing names are retained during migration
- Custom field names are not shown in 8x8 Admin Console
- Custom field names are visible in Switchboard Pro
- Custom fields cannot be set or modified via bulk file upload

   To access the custom fields:

1. Log into 8x8 Admin Console.

2. From the menu, go to **Users**.

3. Select to edit a user record.

4. In the **Additional information** section, access the custom fields.

Ability to auto divert incoming calls to external phone numbers

When you define a speed dial on a user's deskphone, you can also specify a destination to automatically divert inbound calls from them. Auto divert can come in handy when you need to divert a call automatically from a frequented contact. This destination can be an internal contact or an external phone number. In this release, you can enter any valid external phone number to divert an incoming call. Let's say, you have set up a speed dial to reach your Supervisor. You are traveling and you want to receive the calls from your supervisor on your mobile phone number; you can now key in this number to automatically divert the calls from your supervisor to your mobile number.

To set up the auto-divert:

1. Go to your user profile in 8x8 Admin Console.

2. Under **Voice Basic Settings** , next to the Device model, click **Line Key configuration**.

3. Select to edit a speed dial key.

4. Enable auto divert to forward your incoming calls automatically.

5. Enter the external phone number and save your settings.

We have introduced the following new features in the 1.22 release:

Say hello to 8x8 Admin Console!

8x8 Configuration Manager is now 8x8 Admin Console. Please note that we have adopted this change in the documentation.
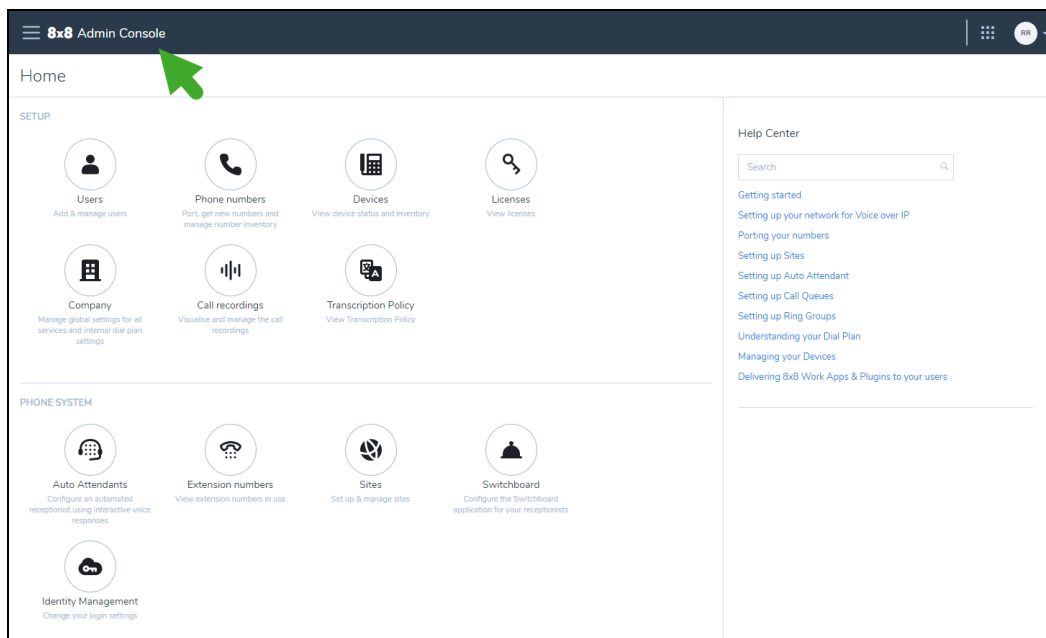
In recognition of the increased importance of digital tools and changes to how we all work, the 8x8 products and services you work with are getting new names as part of their transformation:

- Virtual Office -> **8x8 Work**

- Virtual Office desktop app -> **8x8 Work for Desktop**

- 8x8 Video Meetings -> **[[[Undefined variable 8x8VariablesSet.8x8Meet]]]**

- 8x8 Meeting Rooms -> **8x8 Spaces**

And more!

Introducing Role-based access control

In the previous release, we released 8x8 Role-based access control (RBAC) in limited availability. This feature is now available to all users with some enhancements.

8x8 RBAC is a mechanism around roles and privileges to manage 8x8 Work administration. It allows you to assign permissions to users based on their role within an organization. RBAC lets users have access rights only to the information they need to do their jobs and prevents them from accessing information that doesn't pertain to them. Roles can be used to address multiple needs of your business, from security and compliance, over efficiency and cost control.

Let's say your business needs a role with permissions to configure the entire phone system, a role with permissions to just create sites and users, or a role to manage work groups such as call queues and paging groups. 8x8 RBAC now offers predefined roles and the ability to create custom roles with site specific scope to meet the varying business needs.

Learn more about how to create and assign roles.

Multi-language transcription policies

> **Note:** Multi-language transcription is currently only available to Contact Center Speech Analytics customers on X Series.

With multi-language transcription policies, administrators in 8x8 Virtual Office - Configuration Manager can set policies for which calls are transcribed and in what language those calls are transcribed. This let's you perform speech analytics on non-English phrases.

For example, if you have a Contact Center with queues in English and Spanish, and you can now transcribe the calls in the Spanish queue so your transcriptions are accurate to

the language spoken on the call. This is a major benefit as your calls in non-English are transcribed correctly.

The administrator can set a policy at the agent or queue level, assign and unassign the transcriber and language individually or in bulk. Languages include: French (CA) , Spanish (US), and several flavors of English.

Learn more here: Multi-language transcription policies

We have introduced the following new feature in the Configuration Manager 1.21 release:

Introducing Role-based access control

8x8 Role-based access control (RBAC) is a mechanism around roles and privileges to manage Virtual Office administration. It allows you to assign permissions to users based on their role within an organization. RBAC lets users have access rights only to the information they need to do their jobs and prevents them from accessing information that doesn't pertain to them. Roles can be used to address multiple needs of your business, from security and compliance, over efficiency and cost control.

Let's say your business needs a role with permissions to configure the entire phone system, a role with permissions to just create sites and users, or a role to manage work groups such as call queues and paging groups. 8x8 RBAC now offers predefined roles and the ability to create custom roles with site specific scope to meet the varying business needs.

Learn more about how to create and assign roles.

Limited Availability

This feature is currently in limited availability. It is available to select 8x8 customers only.
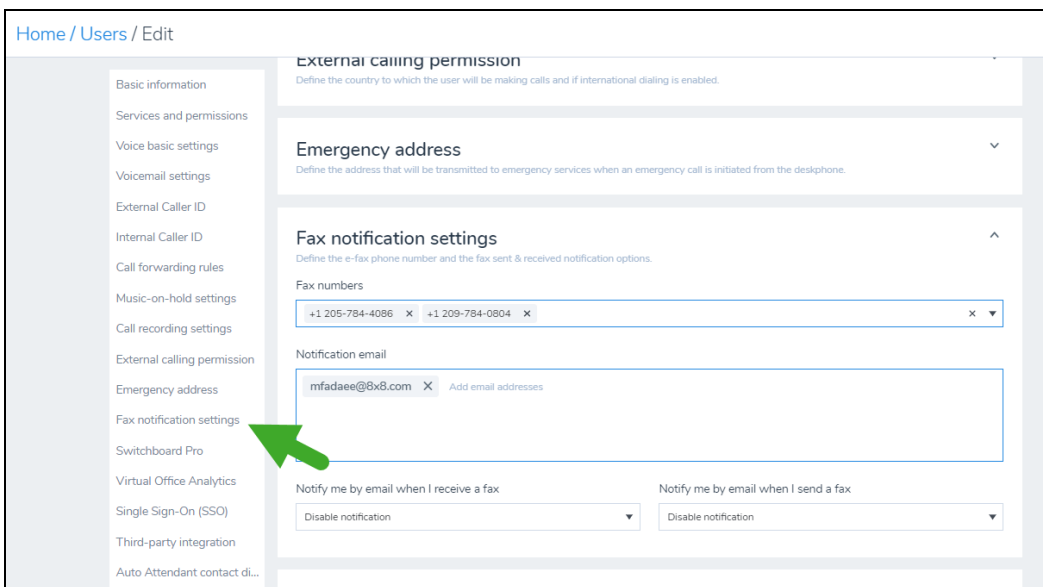
Support for multiple fax DIDs per user

You can now assign multiple fax DIDs per user. Let's say your company employee, Rob manages communication with clients in San Franciso and New York. He receives faxes from his clients daily and has a difficult time sorting them. You can now assign Rob with two or more fax DIDs to manage his business needs. Rob can share separate numbers

with his clients in the two cities and receive faxes on separate numbers for convenient sorting.

To assign fax DIDs to a user:

1. Go to **Users** from the menu.
2. Select to edit a user from the list.
3. From the navigation menu, select **Fax notification settings** to scroll down.
4. Select fax numbers from the list of available numbers.

5. Add the relevant fax notification settings.
6. Click **Save**.

Once the fax numbers are assigned to users, they can simply log into the 8x8 Work for Desktop, go to the fax tab, and send and receive faxes.
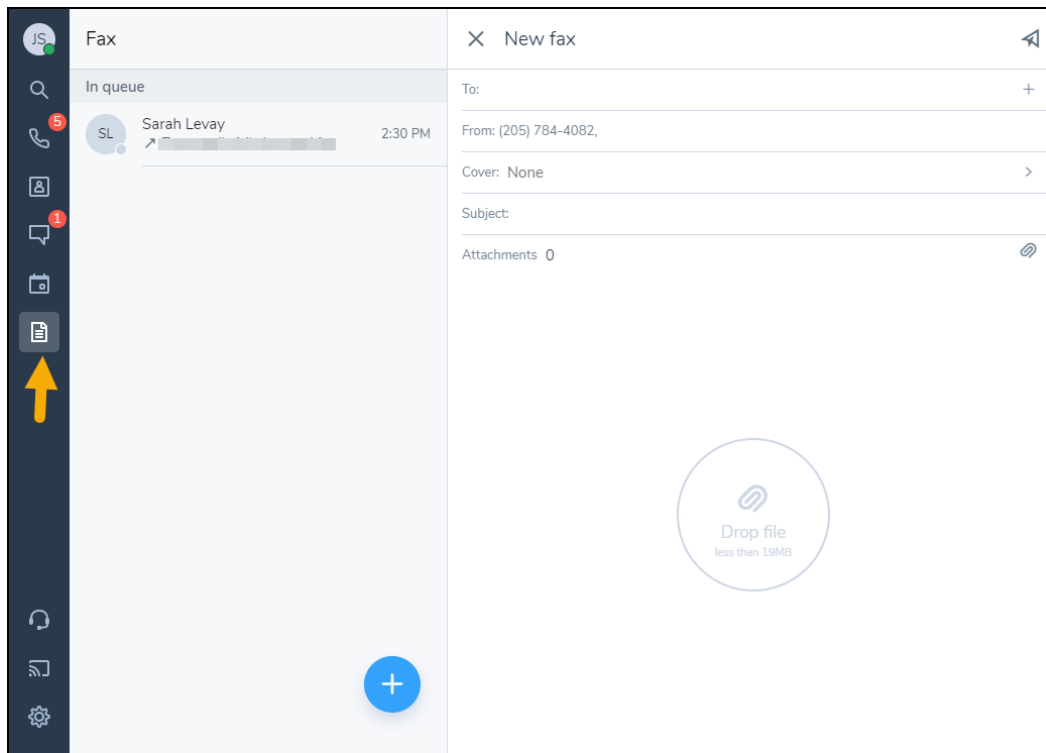
We have introduced the following new feature in the Configuration Manager 1.20.1 release:

8x8 integration with Microsoft Azure Active Directory (AD) which allows users to log in to any 8x8 application using their corporate Azure AD credentials.

To select Microsoft Azure AD as your SSO provider:

1. Go to **Home > Identity Management**.
2. Select **Single Sign on (SSO)** as your authentication method.

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3. Select **Microsoft Azure AD** as your SSO provider and click **Save**.

To enable user provisioning via the 8x8 integration with Azure AD:

Optionally (if you want to enable user provisioning via this integration), in the **Microsoft Azure AD User Provisioning**, click **Show user provisioning information** to display the **8x8 URL** and **8x8 API Token** fields:

Click here and learn more about setting up single sign-on for 8x8 Admin Console using the 8x8 integration with Microsoft Azure AD.

We have introduced the following new features and enhancements in the Configuration Manager 1.20 release:

- Ability to add external contacts
- Enhanced number porting

Ability to add external contacts

Virtual Office administrators on X Series can now centrally maintain a directory of contacts that are external to their organization. These contacts are accessible to end-users in the contact directory of the following apps:

- Virtual Office desktop app
- Virtual Office mobile app
- Switchboard Pro
- 8x8 Contact Center Agent Console

Limitations

- External contacts are not visible on the deskphone directory.
- During bulk upload of contacts, file size is limited to 10 MB (~ 40000 contacts) per upload.
- Custom labels on custom fields are not supported.

How to create an external contact

You can create an external contact one at a time or import them in bulk.

To create an external contact:

1. Log into Configuration Manager.
2. From the menu, select **Contacts**.
3. In the following screen, click **Create contact**.
4. Enter the basic contact information such as first name, last name, and phone number.
5. Enter additional information as necessary.

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6. Click **Save**. An external contact is now successfully created. Go back to the Contacts page to view the newly added contact.

Click here and learn more about adding external contacts in bulk and accessing them in the 8x8 apps.

Enhanced number porting process

We have introduced some improvements to the Number porting process. The Number Porting wizard now allows:

- Collecting information about the preferred porting dates
- Controlling email distribution of notifications received

During the number porting process, you can now select a preferred porting date. Simply select from one of the available porting dates and we will try to agree this date with your previous provider.

> Note: It may not be possible to port on the requested date, but we will not port any earlier.

The porting wizard also allows you to enter valid email addresses to send porting status emails. Learn more about porting phone numbers.

We have introduced the following new feature in the Configuration Manager 1.18 release:

Introducing disaster recovery for 8x8 Contact Center

Availability: Available to 8x8 Contact Center customers on X Series

In this release, 8x8 Contact Center introduces disaster recovery to X Series customers. 8x8 Disaster Recovery Companion Service provides business continuity if the data center hosting your primary tenant suffers a disaster or a site failure. 8x8 Contact Center

Disaster Recovery (DR) companion tenant is a scheduled replica of your primary contact center tenant in the standby mode. This instance of your Contact Center tenant is hosted in a geographically diverse data center and synchronizes periodically with the primary tenant. Contact Center admins configure disaster recovery in the 8x8 Configuration Manager. Should a critical outage occur, Contact Center admins can enable and switch over to a DR tenant with a click. On-demand administration is available using the 8x8 Configuration Manager application, whether you just want more flexibility in everyday call routing, or plan ahead for business continuity during a disaster. You can divert your contact center inbound telephony traffic to your companion tenant or alternate phone numbers.

In this release, we have introduced the following feature enhancements:

Ability to View the Number of Suspended Licenses

You can now view the number of suspended licenses in the Licenses page. Suspended licenses are not usable and cannot be assigned to users. A license may be placed in suspended status if the license was removed from your system by 8x8 team or is associated with a user who is deactivated. For details, see our content on review licenses. Click the info ⓘ icon next to a license to see the report. To see the number of suspended licenses, go to **Licenses** page and click on the info ⓘ icon in the **Quantity**

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column.

> **Note:** Only those license types with a suspended license appear with the info
> ⓘ icon.

Renamed Bulk User Report Columns for Voice

Renamed the following columns for bulk user report:

Column Head (before)	Changed to:	Description
ExternalCallerID.DisplayName	User.Voice.ExternalCallerName	The name used for the external calling number (15 characters long). If the external calling number is a shared number such as a mainline number, then this is not needed.
User.Voice.ANINumberType	User.Voice.ANI	A telephone number

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Column Head (before)	Changed to:	Description
		including the country code used as the user's external caller ID.

To access the bulk user report, go to **Home > Bulk upload** and click to **Download .CSV template**. For the list of columns, see our content on the bulk user upload template.

Enhanced group call pickups to search by extension number

You can now search group call pickups by an extension number. Prior to this release, you could only search the pickup groups with a group name. To search for a group call pickup by an extension number, go to **Home > Group Call Pickups** and enter the extension number you are looking for. For more information, see our content on group call pickups.
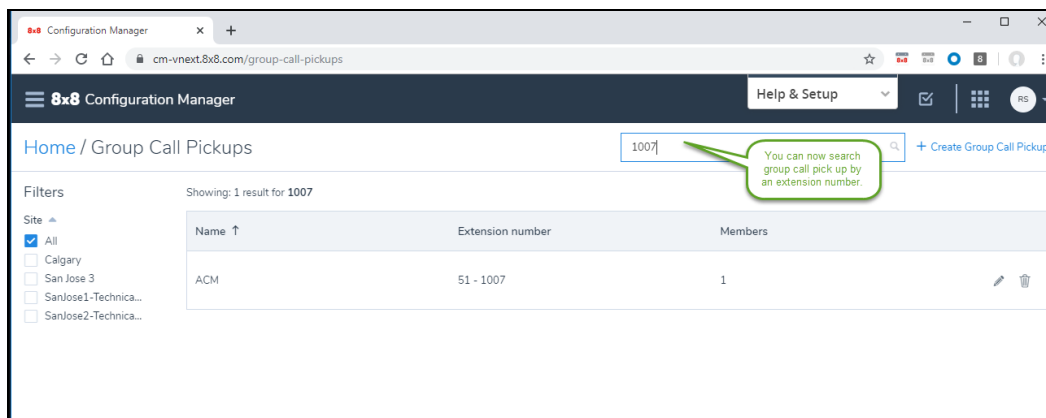
Enhanced Info Panel to View Device Model Information

You can now find the device model in the Info Panel which specially helps when selecting a DECT base or an ATA terminal. Prior to this release, you could only see the device type. To check the device model at a quick glance, go to **Home > Devices** and click **View device report**. Click on a device to open the Info Panel and view the details.

For details, see our content on view devices.

Improved phone number search

You can now search the international phone numbers by entering plus sign **+** and the country code. For example, to easily locate +1 408 334 4564, enter **+1 408** and to locate +44 121 704 4455, enter **+44**. Prior to this release, entering 44 presented all numbers containing 44 such as 1 901 3**44** 4589.

To search for a number, go to **Home > Phone numbers** and enter the + country code in the Search box and press Enter on your keyboard. The results appear in the page. For details, see our content on searching phone numbers. This enhancement can also help

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find phone numbers when working with other features such as automatic call handling.
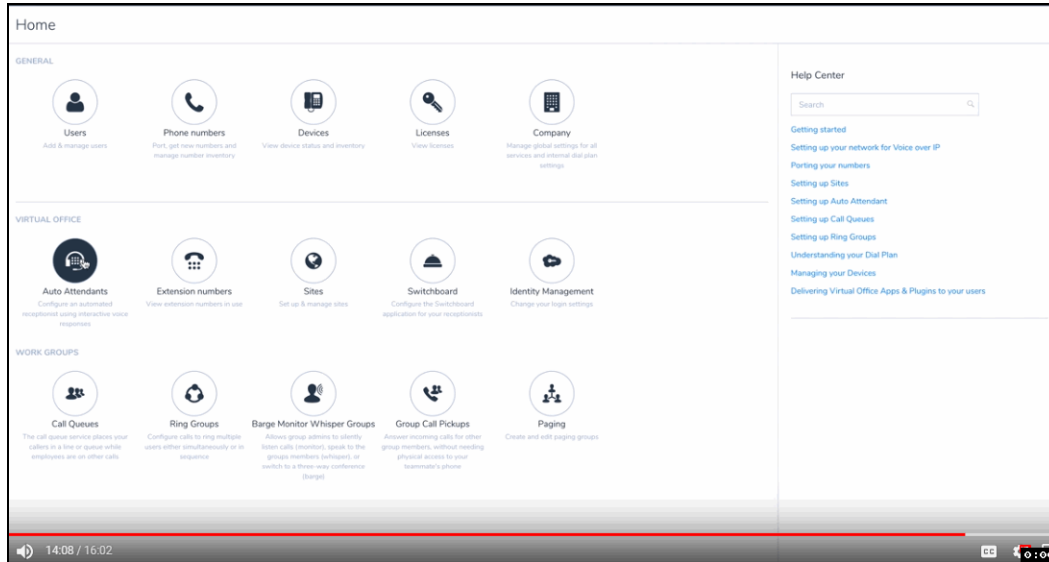
Corrected behavior: ability to change the order of members in ring groups (Firefox users)

Firefox users can now change the order of users in the ring group. Prior to this release, this feature was working for Chrome and Microsoft Edge browsers. To change the order of a ring group, go to **Home > Ring Groups** and click edit to see the Members. Move

the members by dragging and dropping it to the right order using   . For details, see our

content on [setting up a ring group](#).
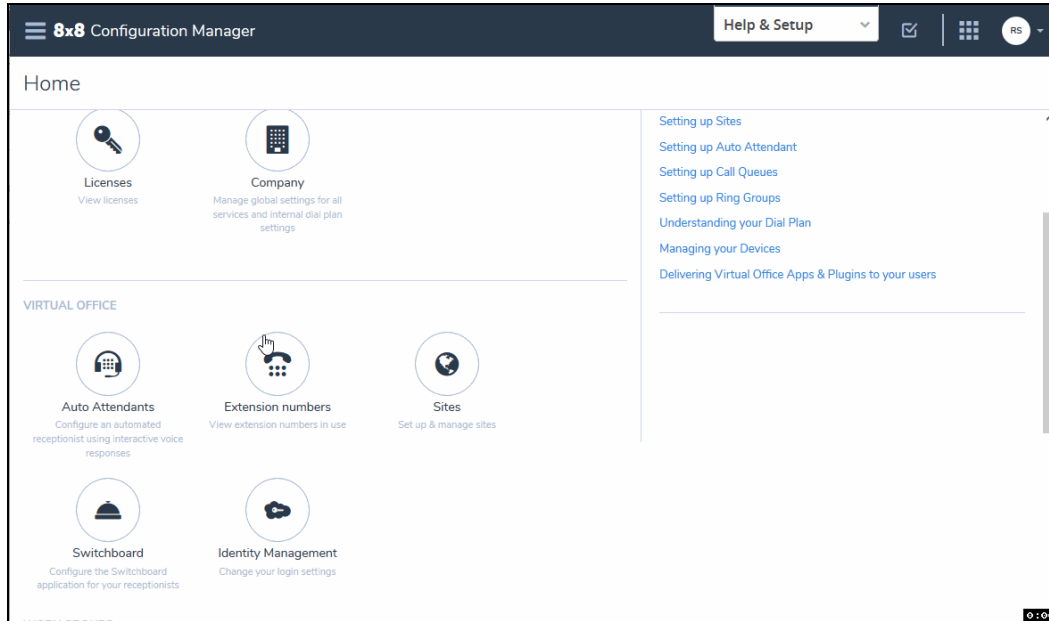
Bug fixed: returns correct results when searching help center

The search box under **Help Center** now returns the right results from the Knowledgebase. To enter a new search, go to **Home > Help Center**, enter a search phrase and press Enter on your keyboard. The results from the 8x8 Knowledgebase

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show up. For detail, see our content on how to get support.
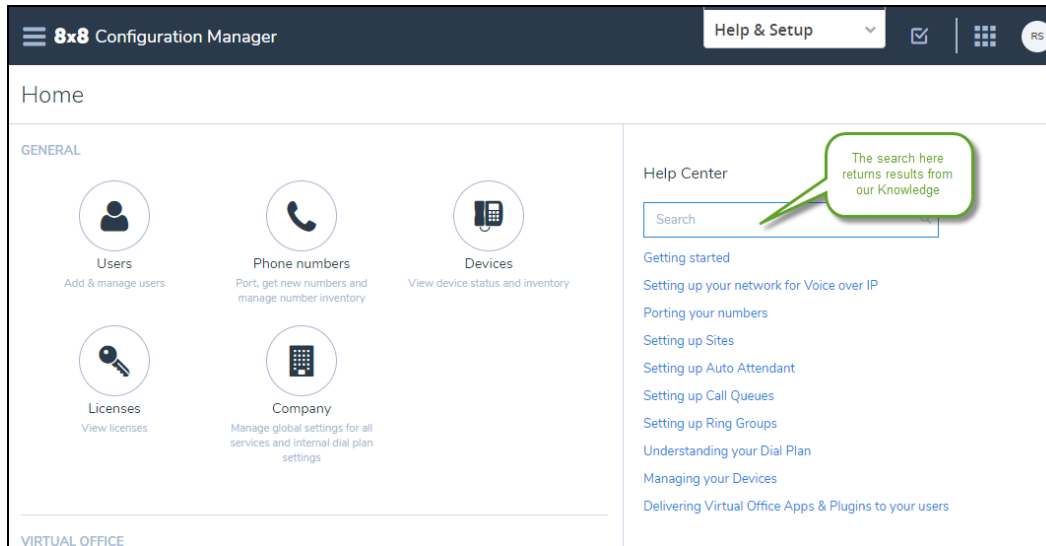
In this release, we have introduced the following feature enhancements:

Ability to edit names of multi-port devices

Naming the base unit of a multi-port device such as a DECT base or an ATA device, helps you in locating the device quickly. Let's say your sales and support teams use separate DECT devices, naming the base units appropriately allows you to assign or remove the right devices to the group members.

In the 8x8 Admin Console, go to **Devices**. From the list, select the desired multi-port device, go to the device report, select the specific base unit, and edit the name. You do not have to go to the user record to change the base name any more.
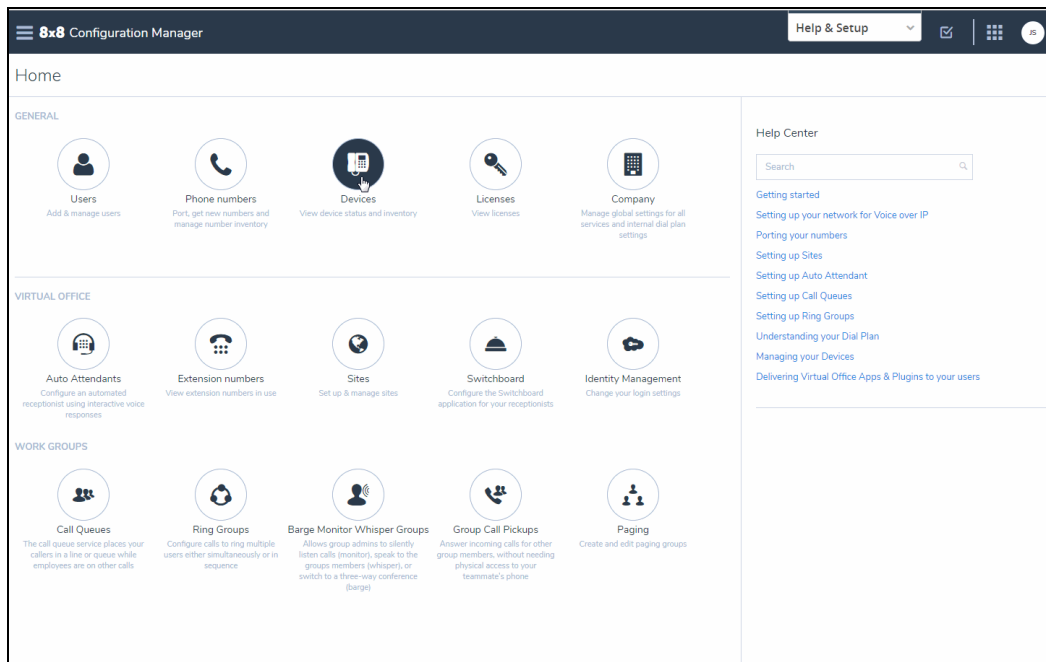
Improved usability in line number porting

During number porting process, the phone numbers requested for porting are assigned with temporary numbers to facilitate business continuity. You are not allowed to change these numbers once assigned. Previously, while selecting temporary numbers manually, the drop down menu gave you an impression that you could select from a menu of choices, which was not the case. The behavior is now resolved. You do not see the drop down menu anymore.

Improved usability while selecting drop-down menu choices

In Configuration Manager, the drop down menu choices for all settings now show the choices in proximity to the selected choice. Let's say you have previously assigned US-Pacific as the timezone for a user and you need to change it to US-Eastern. When you click the drop down menu for timezone, the choices close to the selected choice such as US-Central, US-Eastern are shown minimizing the scrolls in a long menu and improving the usability.

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Basic information
Provide basic information about the user or contact.

* First name

Emily

* Last name

Stuart

* Email

emily@8x8.com

* Username   Suggest

EmilySt

* Site

SanJose1-Technical Publications-ONEL ▾

Language ⓘ   Time zone ⓘ

English - United States ▾   US/Pacific ▲

Then: The choices were listed regardless of their proximity to the selected choice.

Africa/Cairo

Africa/Casablanca

Display contact in company directory ⬤   Africa/Harare
The user will appear in the company's contact directory
                                                         Africa/Nairobi

Contact directory scope   America/Bogota
User can view contacts in the same PBX only
                                                         America/Buenos_Aires
PBX ▾
                                                         America/Caracas

Job title

e.g. Manager

Basic information
Provide basic information about the user or contact.

* First name

Emily

* Last name

Stuart

* Email

emily@8x8.com

* Username   Suggest

EmilySt

* Site

SanJose1-Technical Publications-ONEL ▾

Language ⓘ   Time zone ⓘ

English - United States ▾   US/Pacific ▲

Now: The choices are in proximity to the selected choice.

US/Arizona

US/Central

Display contact in company directory ⬤   US/East-Indiana
The user will appear in the company's contact directory
                                                         US/Eastern

Contact directory scope   US/Hawaii
User can view contacts in the same PBX only
                                                         US/Mountain
PBX ▾
                                                         US/Pacific

Job title

e.g. Manager

Bug fixed

In systems where you had VCC licenses from multiple regions (e.g. US and UK), while assigning a VCC license to a user, even if a US license is selected, after saving the user it showed the license from another region such as UK. This was a cosmetic issue that is resolved with the first alphabetical license name being shown, instead of the correct license name.

In this release, we have introduced new features and enhancements to improve overall productivity.

Ability to change sites in bulk

You can now change the sites via bulk edit as long as the new site is located within the same phone system or PBX. When you change sites, the system does not allow you to change other values in the same bulk edit session. Save the new site before you can change other fields such as time zone or department.

To change a user's site, go to the **Users** page, select one or more users, click **Bulk Edit**, then select to change the site. For details, see our content on changing user sites.
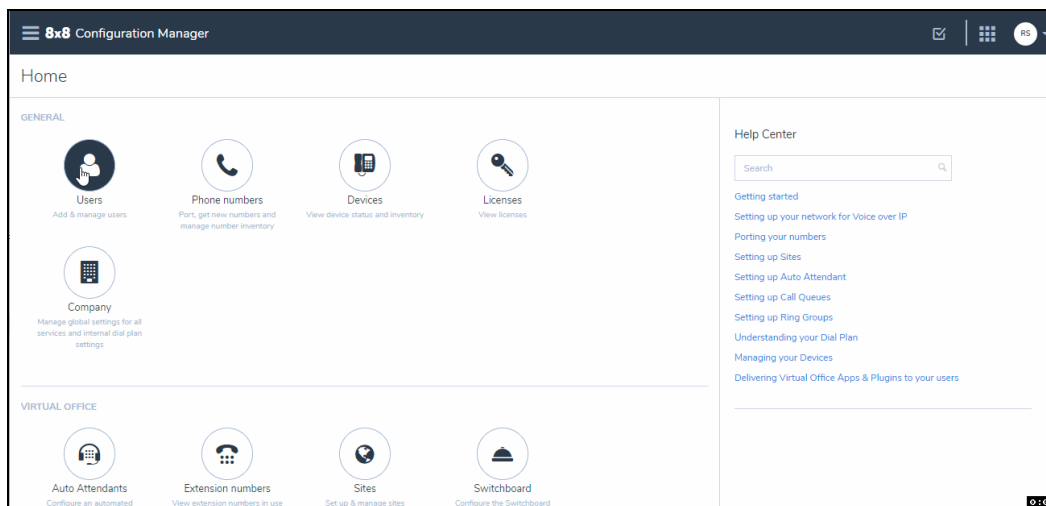
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> **Note:** The site change is only possible through Bulk Edit. To change the site of a single user, go to **Home > Users**, select the user you want to update his/her site and click Bulk Edit, then change the user's site.

> **Note:** If you have to move a user across phone systems, you must delete the user then create the user again in a site that belongs to the new phone system.

Ability to change music-on-hold in bulk

You can now change Music-on-hold for multiple users via Bulk Edit. Prior to this release, you could change the Music-on-hold for users individually. To change the Music-on-hold in bulk, go to the **Users** page, select one or more users, click **Bulk Edit**, then select to change the Music-on-hold. For details, see our content on changing Music-on-hold.
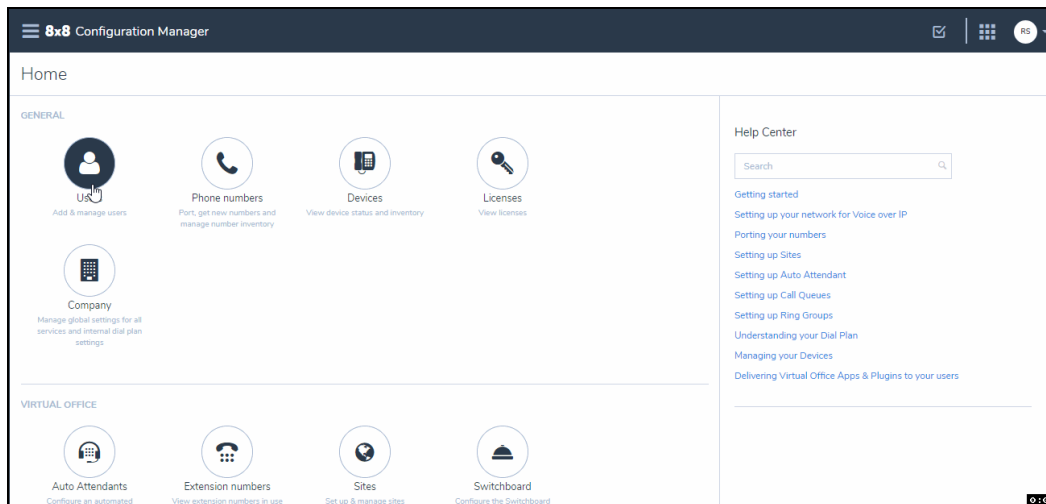
Ability to change multiple profile policies in bulk

You can now create multiple profile policies in a company, change the profile policies in bulk, or select a profile policy as default. If no profile policy is selected when creating a user, the default policy will be assigned to the user. Prior to this release, you could only access the 8x8 Master User Template policy profile.

To create a new profile policy, go to **Home > Profile Policies** and click **+ Create new profile policy**. To change profile policies in bulk, go to the **Users** page, select the users you would like to update, then click **Bulk Edit**. For details, see our content on creating new profile policies and changing profile policies in bulk.
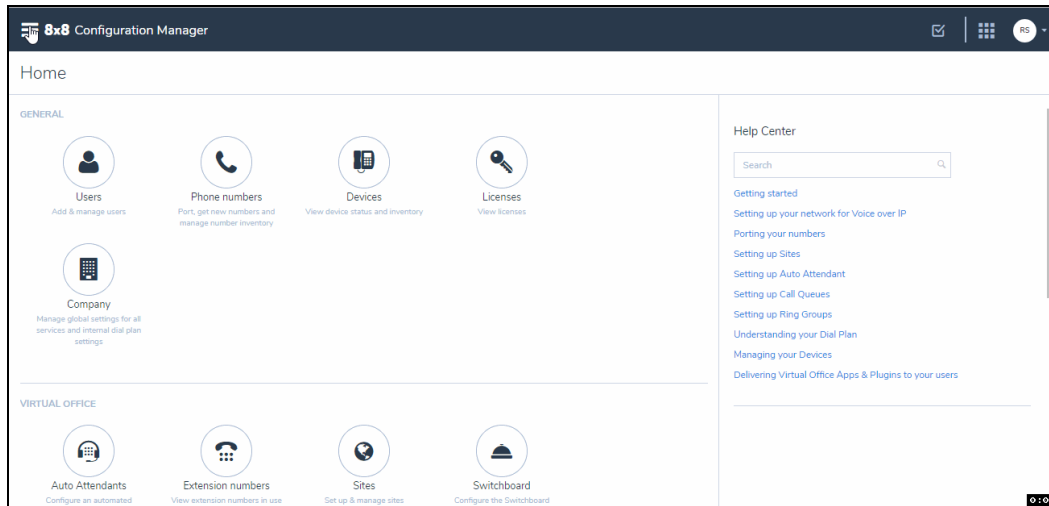
Profile policy is now available through bulk upload and via CSV template download.
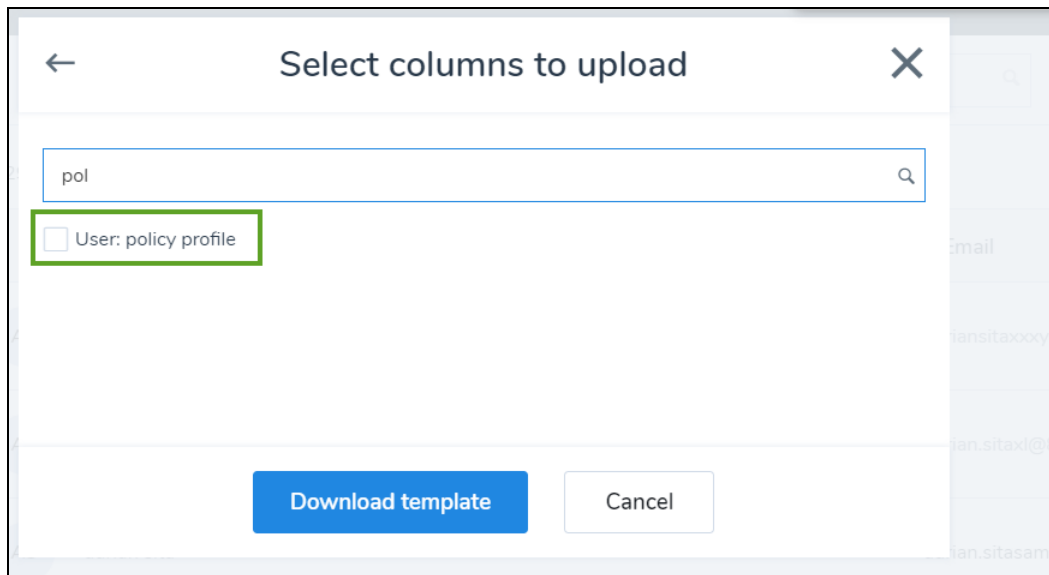
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> **Note:** You cannot delete a profile policy if users are assigned to it. To delete a profile policy, you must remove the users first.

Ability to disable messaging via profile policy

A new profile policy allows you to disable messaging functionality in both 8x8 Work for Desktop and 8x8 Work for Mobile. This new profile policy disables the Chat tab in Virtual Office and prevents users from using messaging.

To disable the messaging option in Profile Policies, go to **Home > Profile Policies** and while editing a profile policy, click to turn on **Disable messaging functionality**. For details, see our content on editing master profile policy.

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📝 **Note:** The chat messaging only applies to VOD version 6.1 and newer, or VOM version 7.7 and newer.

Ability to swap licenses for all virtual office users

You can now easily upgrade or downgrade licenses for all Virtual Office users (VO and VCC) without the need to remove the license. Prior to this release you could only swap the Virtual Office licenses for VO users.

To upgrade or downgrade the user license, go to **Home > Users**, and click **Services and permissions** while editing a user. You can then select another license from the list. For details, see our content on upgrade or downgrade users licenses.

📝 **Note:** You cannot change the user license in bulk.

Increased number of paging groups per site

We can now have up to 25 paging groups per site: one emergency, one priority, and 23 normal paging groups. Prior to this release, we had up to 25 paging groups per company. Within a site, the same restrictions for paging groups apply. You must have users with the right device such as Cisco or Polycom phones activated for paging groups.

To create paging groups, go to **Home > Work Groups > Paging**, then click **+ Create Paging Group**. For details, see our content on paging features and setup.
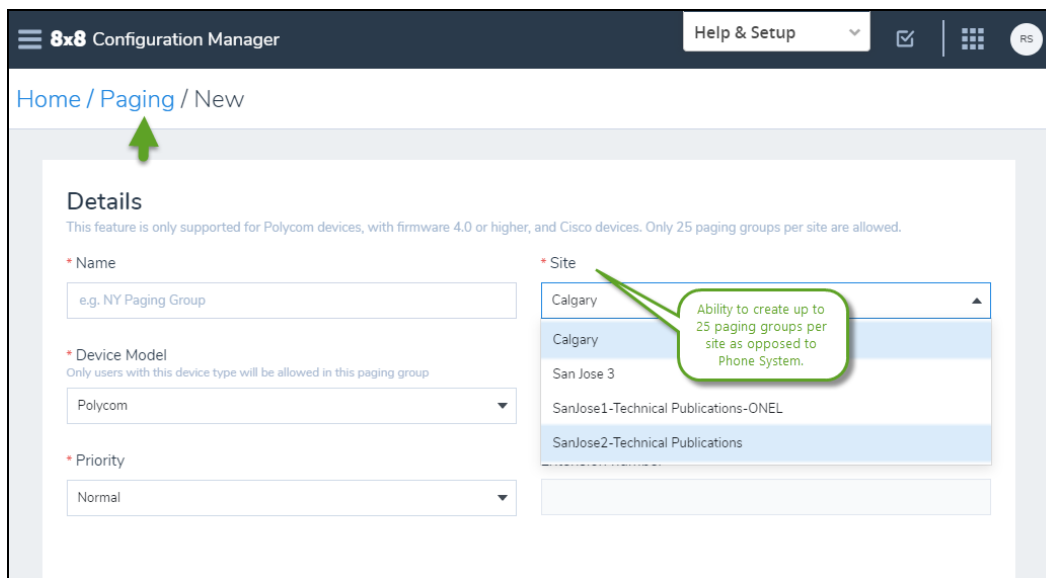
Ability to forward calls to a custom target in call queues

The calls coming to a call queue can now be forwarded to a custom target. The custom number can be an extension number or a telephone number. For example, you can enter a short number, such as 7878, without the dial plan in the target selector and save. The custom number appears in the call forwarding rules.

To enter the custom target in call queues, go to **Call Queues > Call forwarding rules**,

then click ✎ to select a target. For details, see our content on set up call forwarding

Change of behavior: reduced fax notifications to email attachment only

Email attachment is now the only available option for fax notification. Prior to this release, fax notifications were sent as a link in an email, or an email attachment. To set up fax notification, go to Home > Users and while creating or editing a user, scroll down to see **Fax notification settings**. For details, see our content on setting up fax notification.

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Corrected behavior: VCC dedicated extension gets properly locked down

For VCC users, if the dedicated extension is enabled, it locks down the agent's phone to handle the call center calls only and prevents them from dialing out. With a dedicated extension, the extension and Direct-in-Dial (DID) numbers are permanently redirected to Virtual Contact Center agent channels. Prior to this release and during a user profile edit, the agent's dedicated extension was not correctly locked down and the agent could still dial out using his dedicated extension.

To enable the dedicated extension, go to **Users** and while editing a VCC user, click to enable **VCC Dedicated Extension**. For details, see our content on setting up VCC agents with dedicated extensions.
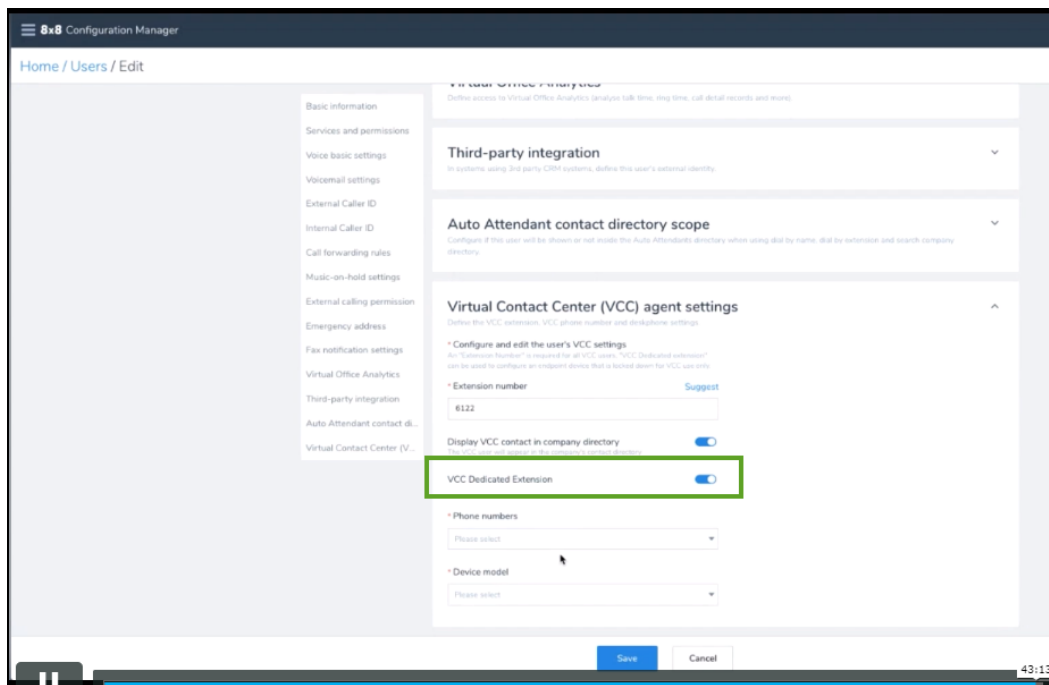
In this release, we have introduced new features and enhancements to improve overall productivity.

Ability to swap licenses for virtual office users

You can now easily swap licenses for 8x8 Work users without the need to remove the license. Prior to this release, upgrading or downgrading a user license required you to remove the license, or remove the user and create another user with the upgraded or downgraded license. In the new behavior, however, you can upgrade or downgrade the licenses by simply selecting another license from the list. This new capability only applies to 8x8 Work users.

Depending on the license type, different capabilities appear in the user profile. For example, a user with a Lobby license type does not have Single Sign-On settings, whereas a user with X4 license appears with Single Sign-On settings in the user profile. When you upgrade or downgrade a license, historical information such as voicemails, messages, and extension numbers are retained. Since the extension numbers do not change, user groups such as ring groups and call queues are not affected. For details, see our content on upgrade or downgrade user licenses.

> **Notes:**
> -You cannot swap licenses for VCC or VO-VCC users.
> -There is no restrictions specific to regions (UK or US).
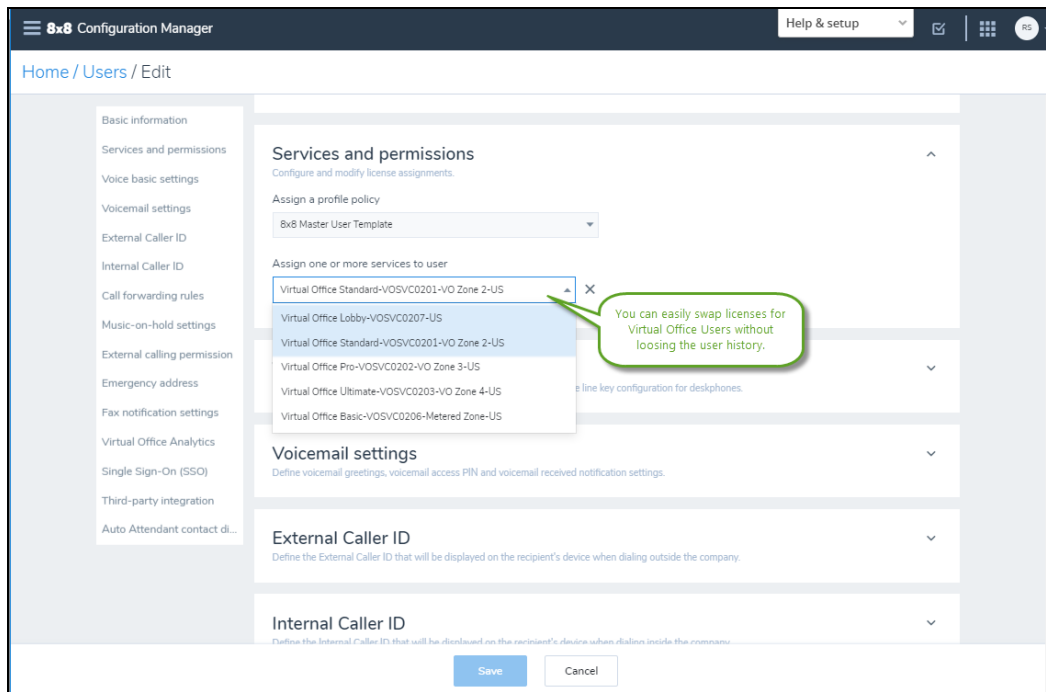
Ability to Hide the 8x8 Contact Center extensions in contact directory

You can now hide the name and number of the 8x8 Contact Center users in the company contact directory. Prior to this release, you could only control the visibility of the 8x8 Work users. For example, if Robin is a VO-VCC user, he has both 8x8 Work and 8x8 Contact Center licenses, therefore he appears twice in the contact directory: once with 8x8 Work extension 1002 and once with 8x8 Contact Center extension 6001. You may show both 8x8 Work and 8x8 Contact Center extension numbers, just one, or no extension numbers for the VO-VCC user.

The display VCC contact in the contact directory is enabled by default. If you disable the option, the name and number are no longer visible in contacts. To hide a 8x8 Contact Center user from the company directory, go to **Home > Users** and while editing a user, click to disable the option under **Basic information > display VCC contact in company directory**. For details, see our content on 8x8 Contact Center contact

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[directory](#).

Ability to select barge monitor whisper admins from all sites

The Barge Monitor Whisper (BMW) group admin is a user with privileges to barge and monitor the phone conversations of the members of a group. Previously, a BMW group admin was restricted to monitor a BMW group belonging to a site that they were part of. In this release, we allow BMW admins to monitor BMW groups belonging to any site. The new enhancement removes the site restriction for BMW group admins.

To find a new BMW admin from any site, go to **Barge Monitor Whisper Groups > Group Admins** and while editing a group, select any admin from the list. For details, see

our content on how to set up Barge Monitor Whisper.
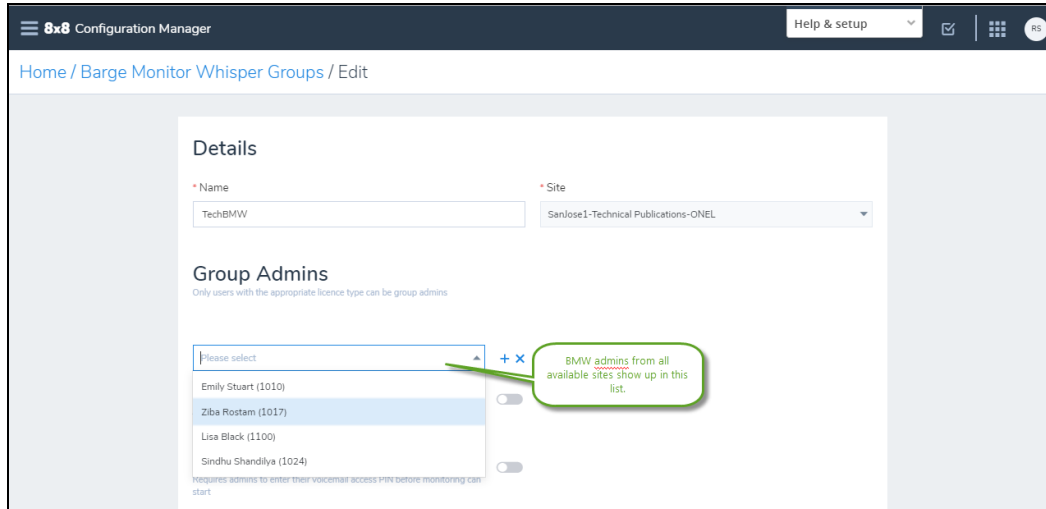
Modified the default value for ring group total alert time

We have now increased the default duration to alert a ring group member to 15 seconds. This value defines how long an incoming call should ring before moving to the next member. With the new enhancement, each member gets 15 seconds by default instead of ten seconds, which increases the number of rings to about three rings. The maximum alert time is 180 seconds.

To modify the total time, go to **Ring Groups > Total time to alert a member** while editing a ring group. For details, see our content on how to set up a ring group.

In this release, we have introduced new features and enhancements to improve overall productivity.

Updated profile policy

8x8 Work for Desktop end users can set their preferences via Account settings, for features such as voicemail, music on hold, caller ID, call forwarding, and more. These settings are available to users by default. We have introduced new profile policies that can limit access to these settings. As an admin, set these permissions in the 8x8 Admin Console's Profile Policies page. As an extension user, you can invoke the account settings via the 8x8 Work for Desktop to view the settings you are allowed to define. For example, if you want to prevent extension users to edit their fax settings, from the main menu, open **Profile policies** and enable this control. For details, see our content on how to Edit the Master Profile Policy.

As an Admin:
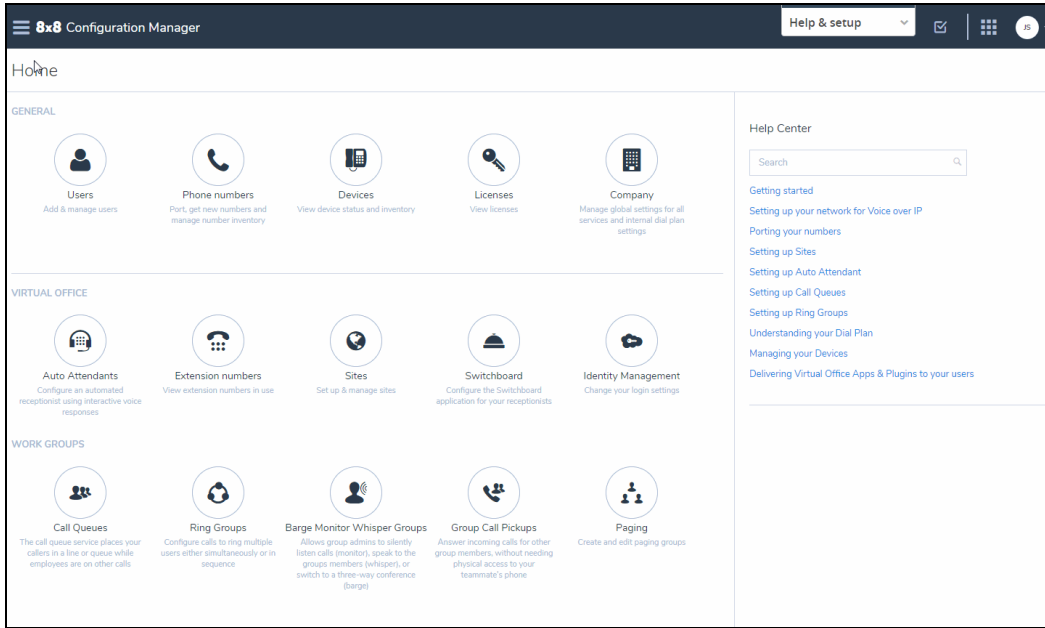
As an Agent:
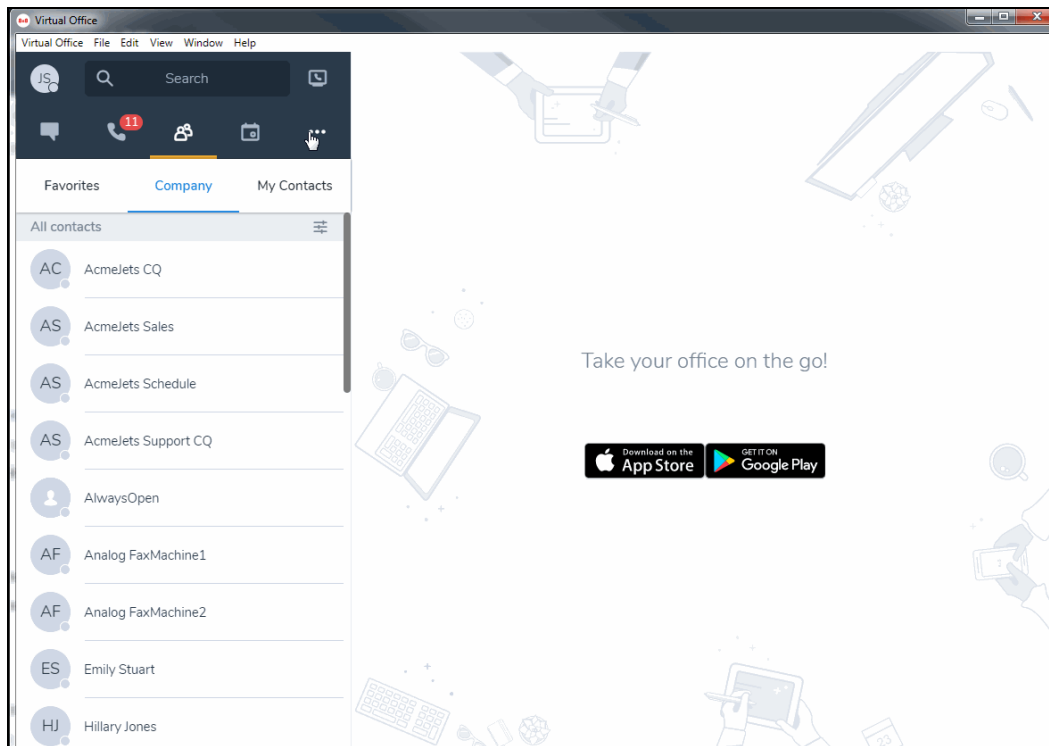
Introduced users bulk edit via user interface

Do you need to change user information such as language, address, or call recording settings in bulk? You can now modify the same property for many users at once via the 8x8 Admin Console interface. Using bulk edit, you can change the user information for multiple selected users, review the changes before performing the bulk edit, and cancel the bulk user edit operation at any time.

From the Users page, select the desired users, then select **Bulk Edit**. Choose the properties you want to edit and review the edited properties before committing them. For details, see our content on how to Edit Users in Bulk.

You can undo edits to the properties by going back in the review page. Review the summary of chosen edits and proceed to commit.

After committing the desired edits, you can access a report detailing the task completion. To download and view the report, go to the Tasks page.
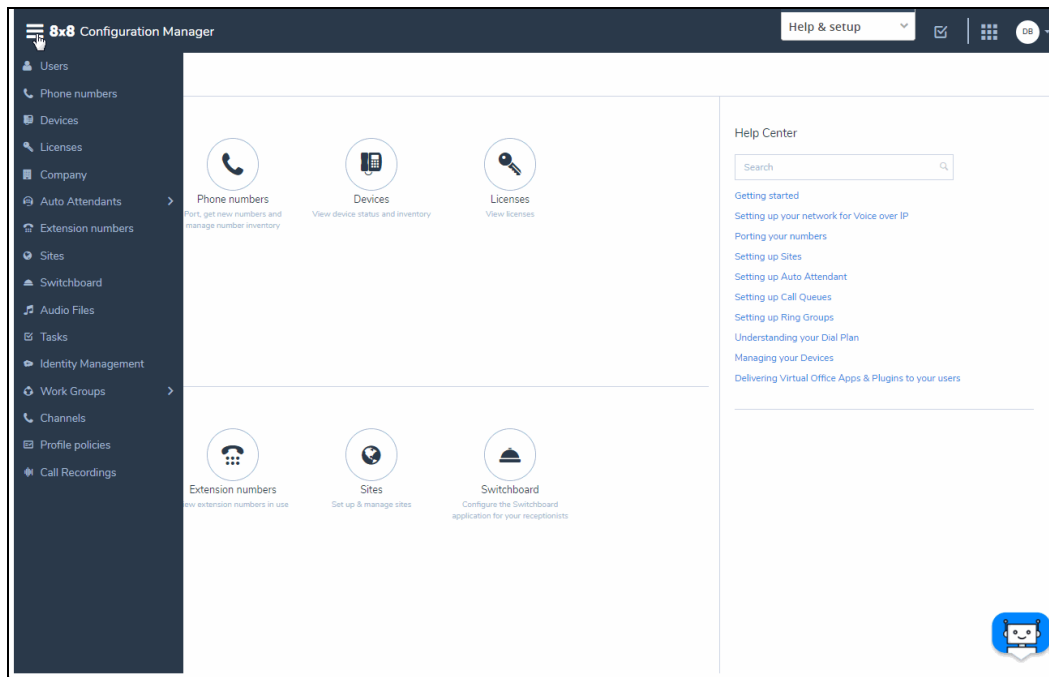
The uploaded tasks are processed and listed on the Tasks page. You can access the list of tasks in progress with the ability to download the error report. Download the reports for more information and decipher the process updates.

To cancel an upload request that is in progress, simply cancel the request. The report indicates the number of rows processed and provides details.

Enhanced bulk uploading process

In bulk upload, the basic and advanced templates are now merged into one. We offer a single template which includes all supported fields (nearly 50). When you click to download the template, you can simply select the desired columns. We pre-select a few columns. To learn more about bulk upload, see Create Users in Bulk.
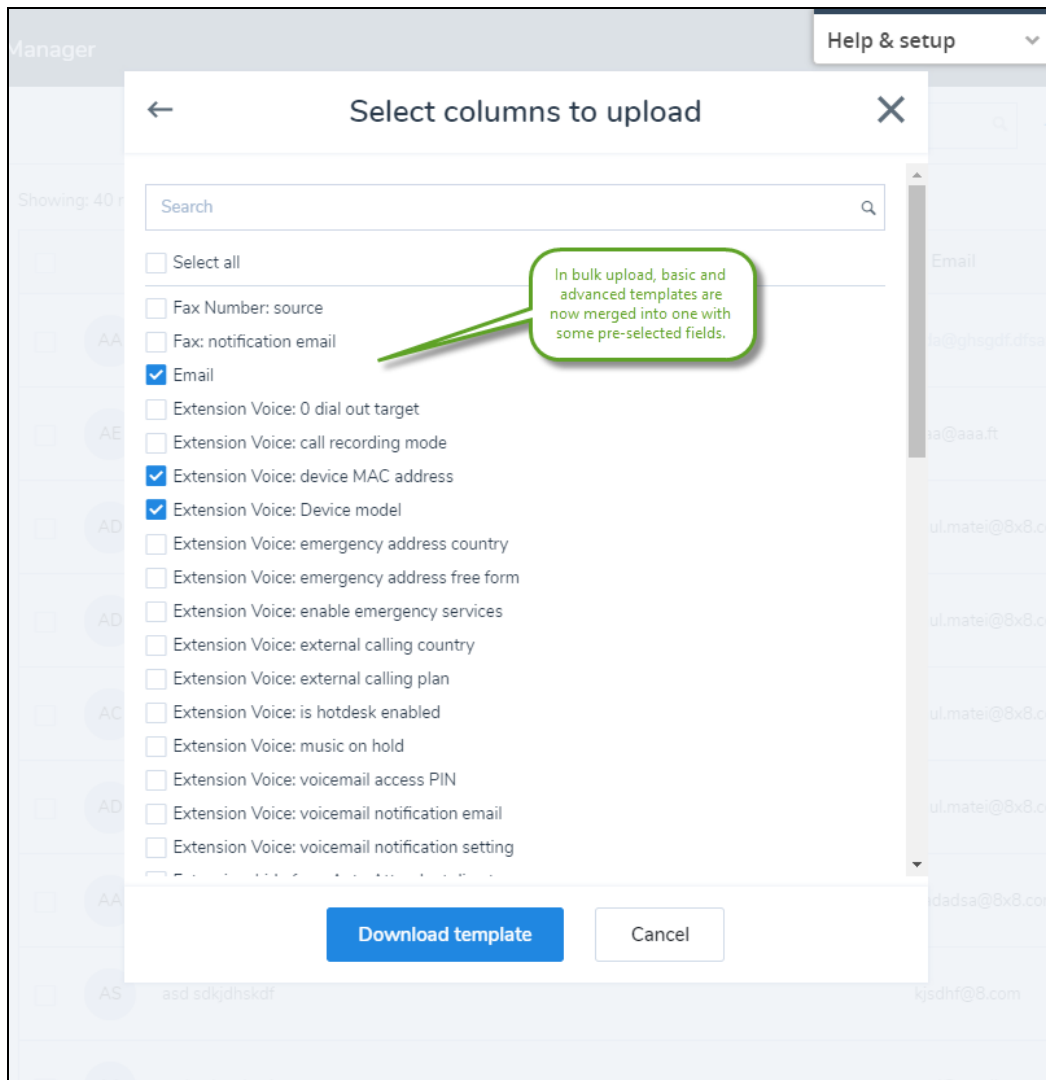
During bulk upload of users, you can now validate the data in your file beforehand, fix the errors, and then continue to process. If you have a large number of users to upload, this feature comes in handy. The options to validate, and validate and process are available in the Bulk upload screen.
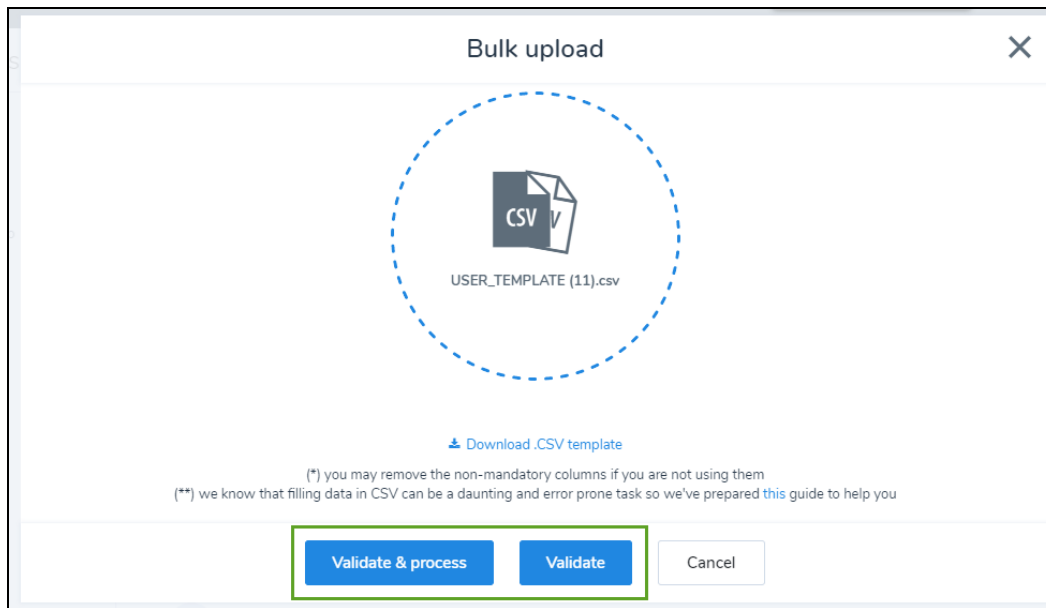
In the Process user report that you download from the Tasks page, the UserValidateDetails column provides guidance regarding the encountered error on the row and how to fix it.

Best practice: While preparing data for bulk upload, we recommend you to verify the information in the CSV file with the information in our Bulk User Upload Template Fields.

Ability to set the ring timer for ring groups

As an admin, you can specify a timer for how long to alert a member before moving the call to the next member or to the ring no answer rule. For details, see our content on Set

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up Ring Groups and Add Members.

Ability to clone auto attendants

Do you have a lengthy auto attendant menu that must be replicated for multiple offices or in multiple languages? You do not have to build these auto attendants all over again. You can now clone an existing auto attendant and edit the site or language information, select a phone number, and get them going quickly. For details, see our content on how to Clone Auto Attendants.

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Improved the start-up performance for Configuration Manager

We have introduced performance improvements for loading up 8x8 Admin Console, cutting the start-up time in half.

Data presented in the information panel such as user information is now cached allowing you to view the previously accessed information quicker than ever before.

Renamed voicemail password to voicemail access PIN

To eliminate any confusion between user account password and voicemail password, we have renamed the voicemail password to voicemail access PIN. For details, see our content on set up Voicemail Access PIN.
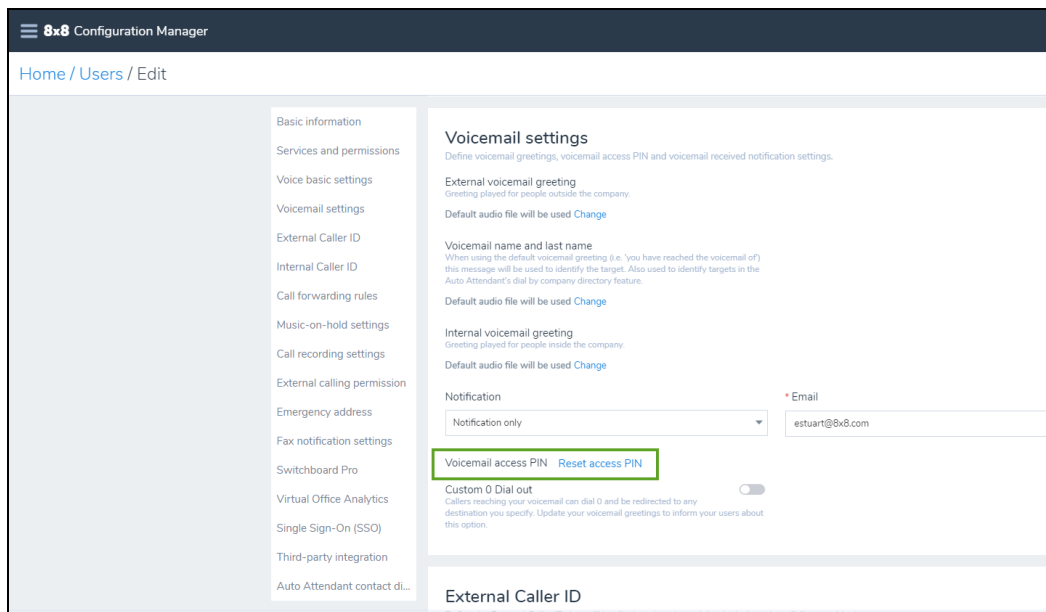
Support for partial matches in call forwarding rules

When creating or editing a call forwarding rule, you can now search for selected callers with partial matching phone numbers. For example, you specify that all calls coming from a particular area code must be blocked. Enter the country code as well like in 1 408, for a better experience. To create a new call forwarding rule, go to **Home > Users** and click to edit a user, and add a new call forwarding rule. For details, see our content on Set up Call Forwarding Rules.
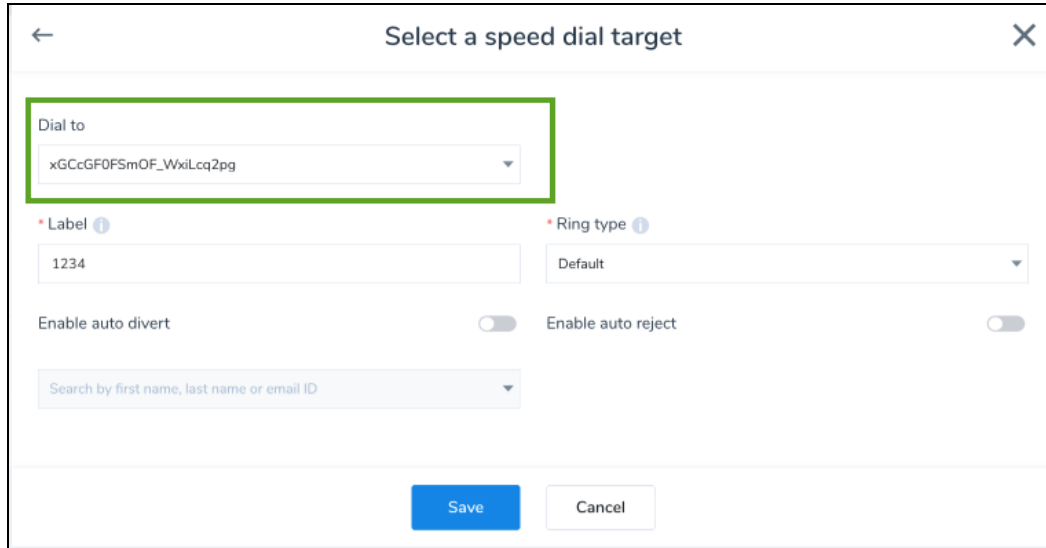
Speed dial target is correctly shown for call park extensions

When creating a speed dial to an existing call park extension, the Dial to field now shows the target correctly in the speed dial. For details on how to create call park extensions, see our content on Set up Call Park Extension. For details on how to create speed dials, see our content on Add speed dial keys.
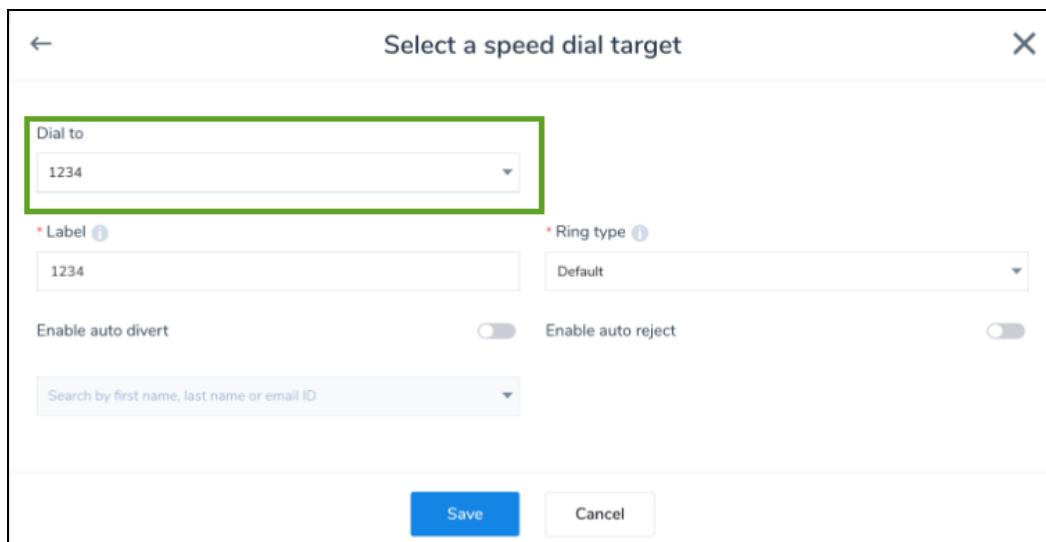
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Before:

Now:

Device activation code now appears after saving users

The device activation code no longer appears under Voice Basic Settings before the user is saved. Once the user profile is saved and ready, the device activation code appears. The user can then activate the device using that code. Prior to this release, the

device activation code was available while creating a user. For details, see our content
on Activate a device.

In this release, we have introduced new features and enhancements to improve overall
productivity.

Improved user experience in identity management

We have introduced a better user experience while configuring your company's Single
Sign-On preferences via 8x8, SAML, or Google. In the Identity Management page, find
the supported authentication options right at the top of the page. 8x8 Username and
Password is selected by default. Select a provider and the relevant information is
presented to you for further configuration. For details, see our content on Identity
Management. For details, see our content on setting up Single Sign-On.

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Editing list items is now simpler!

Wish to edit a user, queue, ring group, and more? Simply navigate to the desired page

from the main menu. Click the ✏ next to the desired item to view the individual record in edit mode.

Before:

Now:

Enhanced line key configuration usability in Cisco devices

While configuring line keys for Cisco devices that support a single line key, we have introduced minor usability enhancements.

- By default, you have only one line appearance key supporting four concurrent calls.

- The **+ line appearance** button is hidden for Cisco devices, you cannot add or delete any line appearance keys.

For details, see our content on Set up Line Appearance Keys.

Visibility of personal phone number

Adding personal phone numbers to company contacts now supports numbers entered in any format. This number shows up as the mobile number for end users in the 8x8 Work for Desktop. To add the personal number in VO-8x8 Admin Console, while editing a user profile, enter your phone number in **Personal contact number field** and save. For details, see our FAQ content on how to add a mobile number.

Improved data loading time

With the improved performance, you can now access data in 8x8 Admin Console quickly.

Account settings page now supports IE 11

Prior to this release, while accessing the individual account settings from Virtual Office Desktop, users encountered errors on IE11. It is now resolved.

In this release, we have introduced new features and enhancements to improve overall productivity.

Ability to remember your search

You can now search and filter different entities such as users, phone numbers, and sites, for easy and quick access. The search results will be saved even if you navigate away from the search screen. Let's say you searched users with first name 'John', the resulted list will be saved until you clear the search entry.

To search users, go to **Home > Users** and enter a search entry. Press Enter on your keyboard to see the results. To go back to the complete list, clear the search entry and press Enter again on your keyboard. For details, see our content on searching users.

Improved experience in finding incorrect fields in user profiles

You can now find the incorrect fields quickly while editing a user's properties. Before you save a user, you are navigated to the section that requires a valid value. Enter the correct value and save. This feature helps you save time searching for the properties that need to be corrected.

To create a new user, go to **Home > Users** , and click **Create User**. Make the necessary changes and **Save**. If there is any incorrect data, you are taken to the field. For details, see our content on set up 8x8 Work users.

Zero dial out now defaults to site receptionist

Zero dial out now defaults to site receptionist if you have set up one. When setting up voicemail settings for a user, site receptionist option becomes the default for custom zero dial out. To access custom zero dial out, open a user profile and go to **Voicemail settings**. Click to **enable custom 0 Dial out**.

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For details, see our content on how to redirect callers from voicemail by dialing zero.
For details on how to set up a site and site receptionist, see our content on Set up Sites.

Ability to view and manage audio files context

You can now view more context, such as file names and notes, in audio files and manage them better. Let's say you have audio files in multiple languages, you can leave a note to indicate the language. To access audio files, go to **Home > Audio files** and see the notes column. You can sort audio files by notes or file names. For details, see our content on audio files library

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Home / Audio Files

Showing: 7 results for Audio Files

Added Notes to this page for better audio files management

Search by name

+ Create Audio Files

Name ↑	Notes	Size	Last modified	Play			
Acmejets-SAway	AcmeJets Music on hold	4.84 MB	07/18/2018	▶ 0:00 — 3:20	1x	⬇	⋮
FirstNameLastName		38.2 kB	09/20/2018	▶ 0:00 — 0:04	1x	⬇	⋮
Kalimba Audio File		8.41 MB	11/14/2018	▶ 0:00 — 5:48	1x	⬇	⋮
Maid with the Flaxen Hair		4.11 MB	07/18/2018	▶ 0:00 — 2:49	1x	⬇	⋮
Rob Shasta VM Greeting		52.9 kB	11/13/2018	▶ 0:00 — 0:06	1x	⬇	⋮
Sleep Away	AcmeJets audio1	4.84 MB	10/02/2017	▶ 0:00 — 3:20	1x	⬇	⋮
test	ddd	68 kB	11/14/2018	▶ 0:00 — 0:08	1x	⬇	⋮

Enriched user report

You can now view user's contact address, and external caller ID name, when you generate a user report. You can quickly find users information, audit, and verify them. To generate the report, go to **Home > Users** and click **Generate users report**. For details, see our content on how to generate user reports.

Improved system performance during porting process

We have now improved system performance when gathering the porting request information. For details, see our content on how to port your phone numbers.
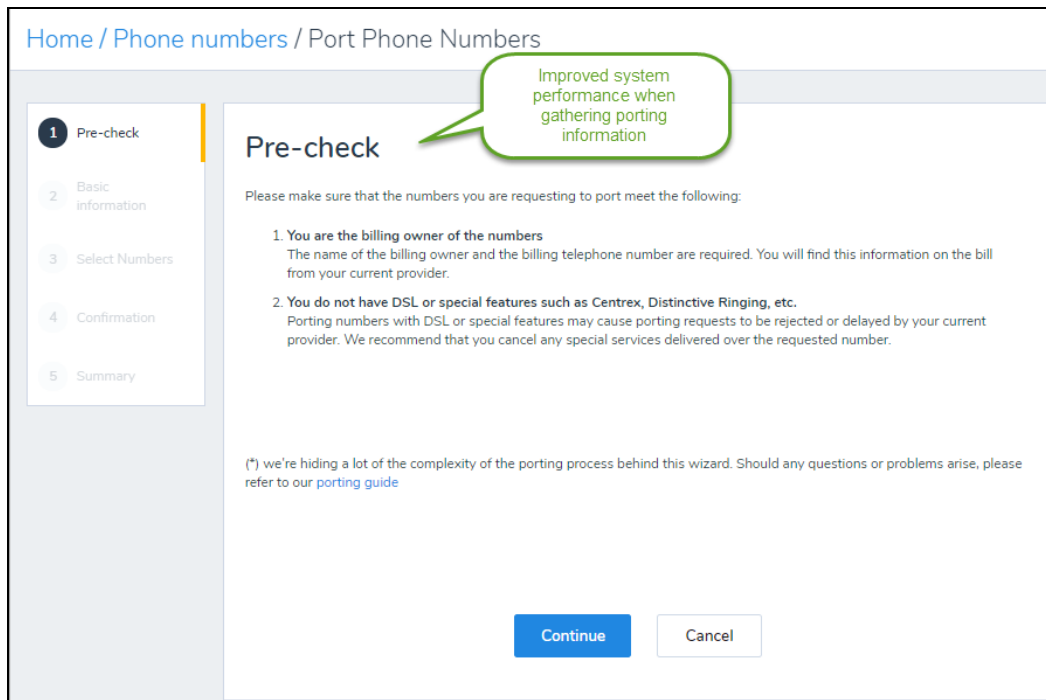
In this release, we have introduced new features and enhancements to improve overall productivity.

Improved navigation in user, ring group, and call queue pages

Improved left-side navigation menu in the User's page allowing easier navigation to all features. The navigation menu allows you to jump to the desired section quickly without having to scroll multiple screens. The navigation menu is available while creating and editing users, call queues, and ring groups. For details, see our content on set up users,

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call queues, and ring groups

> 📝 **Note**: The 8x8 Work for Desktop users can also benefit from the improved navigation on the Account Settings page.

Introducing dedicated audio files management page

Whether you want to update a voicemail greeting for a user or upload a new audio file for hold music, you can manage all the audio files from a centralized location. From the main menu, go to **Audio Files**, then view the list of uploaded audio files, search, play, delete, and more. For details, see our content on Manage audio files library.

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Ability to set up voicemail greetings for ring groups and call queues

You can now set up separate voicemail greetings for external and internal callers in ring groups and call queues. Simply edit an existing ring group or call queue and change the voicemail settings for external and internal voicemail greetings. To access ring group's voicemail greetings, go to **Home > Ring Groups > Edit > Voicemail settings**. For details, see our content on ring groups voicemail settings. To access call queue's voicemail greetings, go to **Home > Call Queues > Edit > Voicemail settings**. For details, see our content on call queues voicemail settings.

Quicker access to the user device information

With improved access to the user device information, you can now select a user record from the user list and view the device model that the user is assigned to along with the activation status, Mac ID, and device admin password. For details, see our content on Select a device.

Minor enhancements in call forwarding rules information

While defining call forwarding rules, we now specify the duration for forwarding calls. When a user does not answer a call for 15 seconds (approximately three rings), the rule triggers the call to be forwarded. You can set this duration as desired. For details, see our content on define call forwarding rules.

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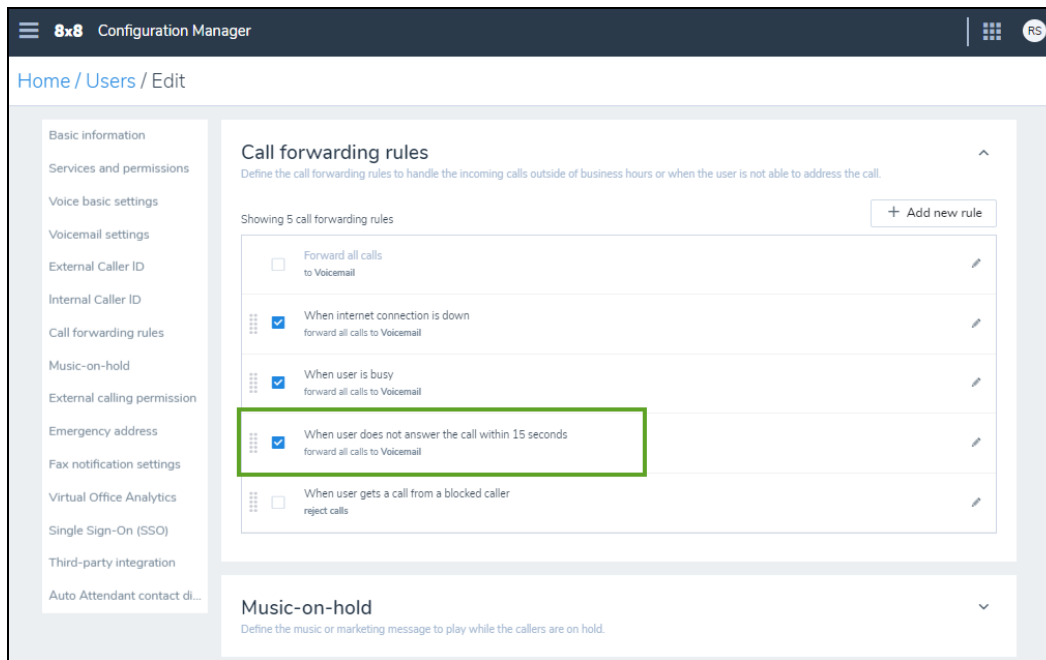
Improved auto attendant summary setting information

Improved description in the Auto Attendant menu settings guides admins about the behavior when callers fail to select an option from the menu. By default the auto attendant menu replays once and further failure of action from callers results in a dropped call. These settings allow you to edit the number of menu replays and call routing when there is no action by callers. For details, see our content on Auto Attendant's edit settings.
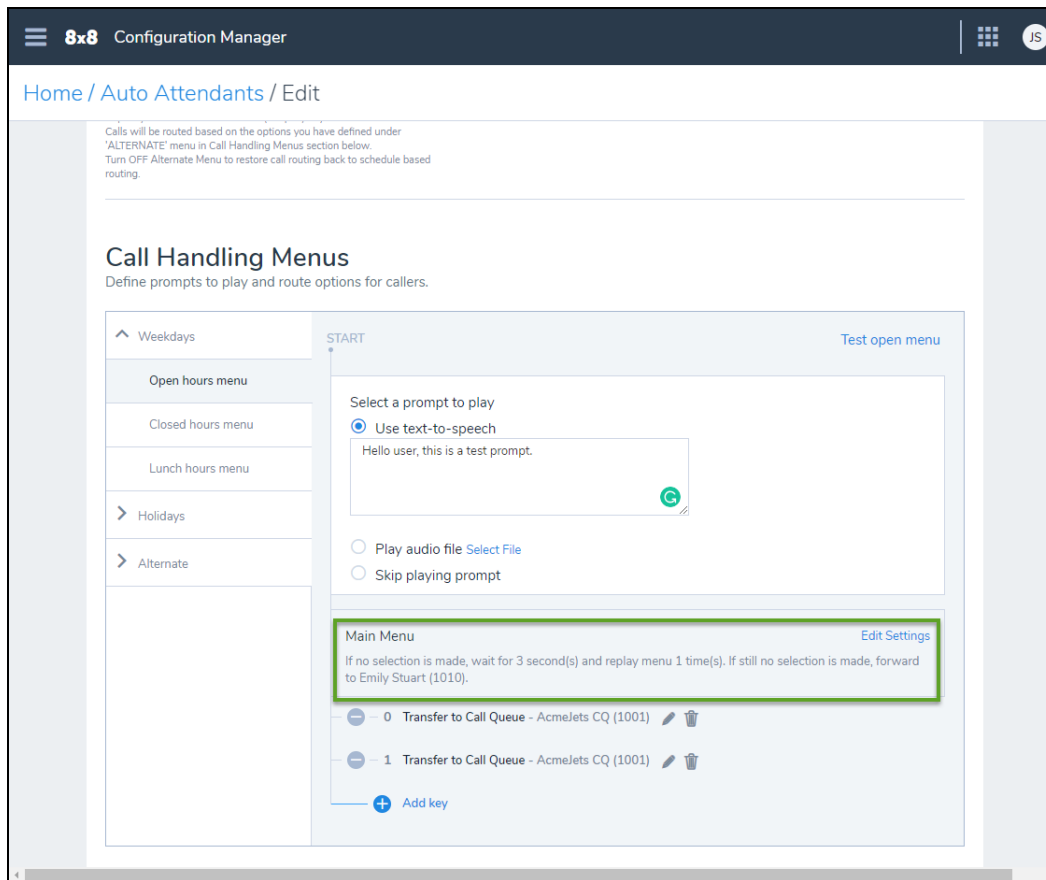
User policy renamed to profile policy

In the previous release 1.6, we introduced policies which allow administrators to disable Virtual Office Meetings, access to call recordings, and the ability to update 8x8 Work for Desktop at the user level. These policies are now renamed from User Policies to Profile Policies. To access this feature, click **Profile policies** from the main menu. For details, see our content on Profile policies.

In this release, we have introduced new features and enhancements to improve overall productivity:

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- **Support for VCC user configuration in a Multi-PBX environment**: Phone system admins can now view the VCC tenant name and the PBX it is linked to in the Company page. This information helps them in handling the site assignments of users smoothly. When you create a site that includes VCC users, make sure the site belongs to a VCC-enabled PBX. Before assigning VCC services to a user, assign the user to a site that is VCC enabled.
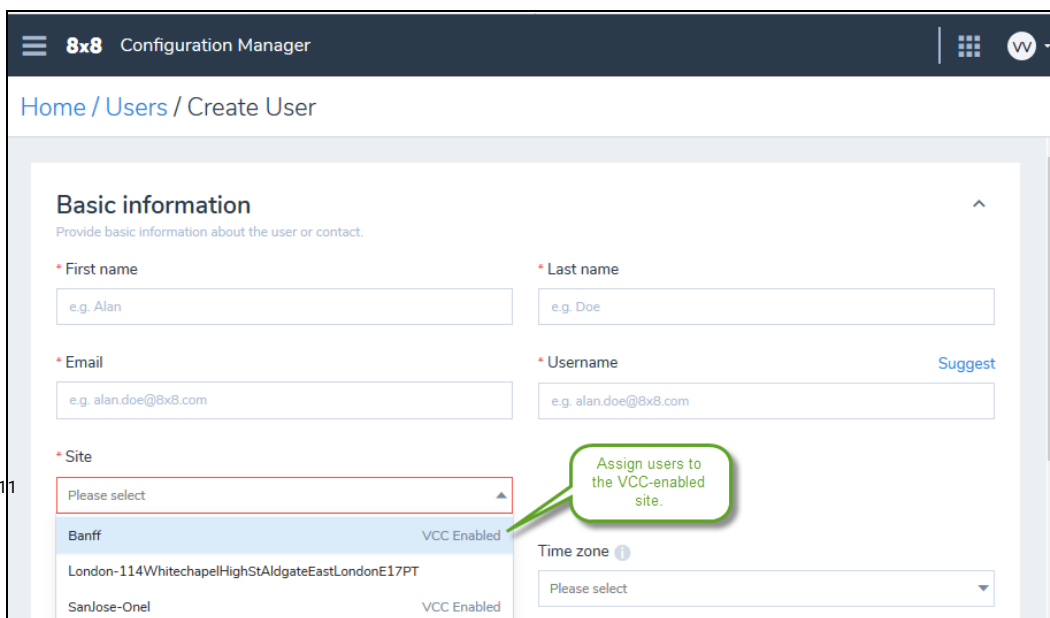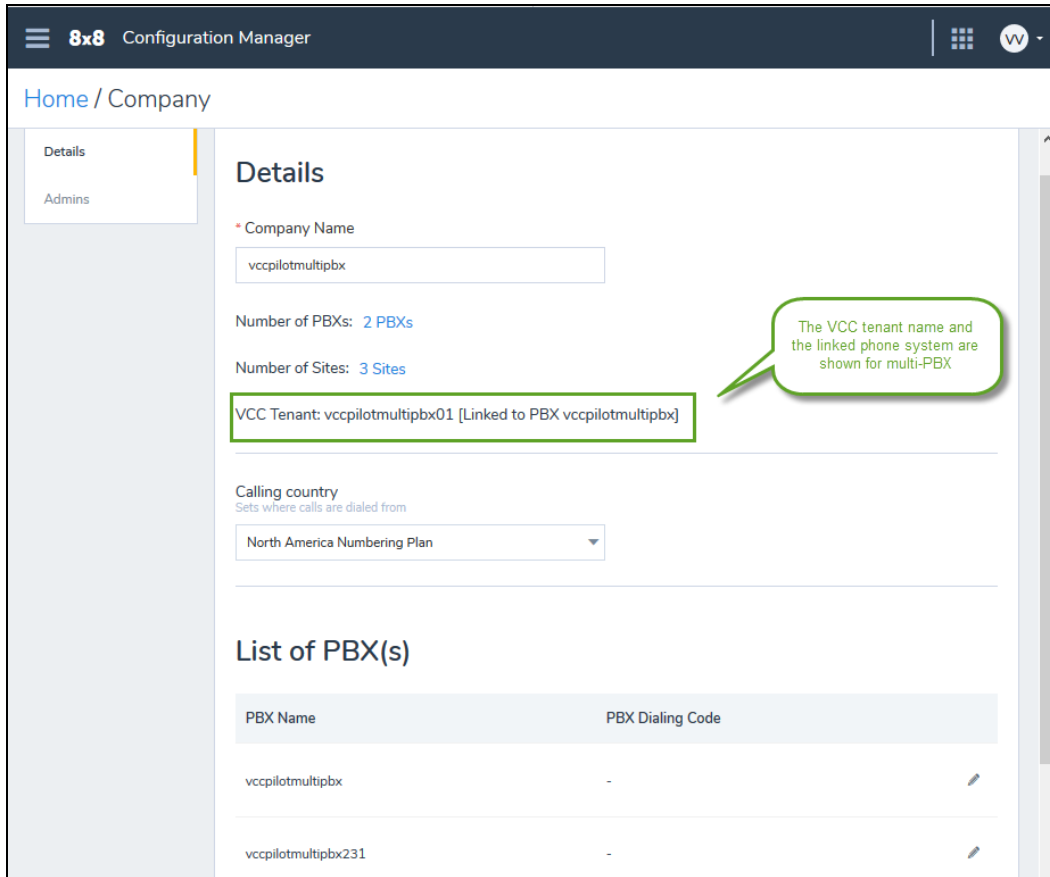
- **Introducing 8x8 Profile Policy**: The 8x8 Profile Policy offers the ability to restrict users from using meetings or upgrading to a recent version of the 8x8 Work for Desktop, accessing and deleting call recordings. With this service, you can now disable these features company wide by using a master user policy. Let's say companies with existing solutions for meetings want to disable the Virtual Office meetings app. They can edit the master user policy to disable meetings.
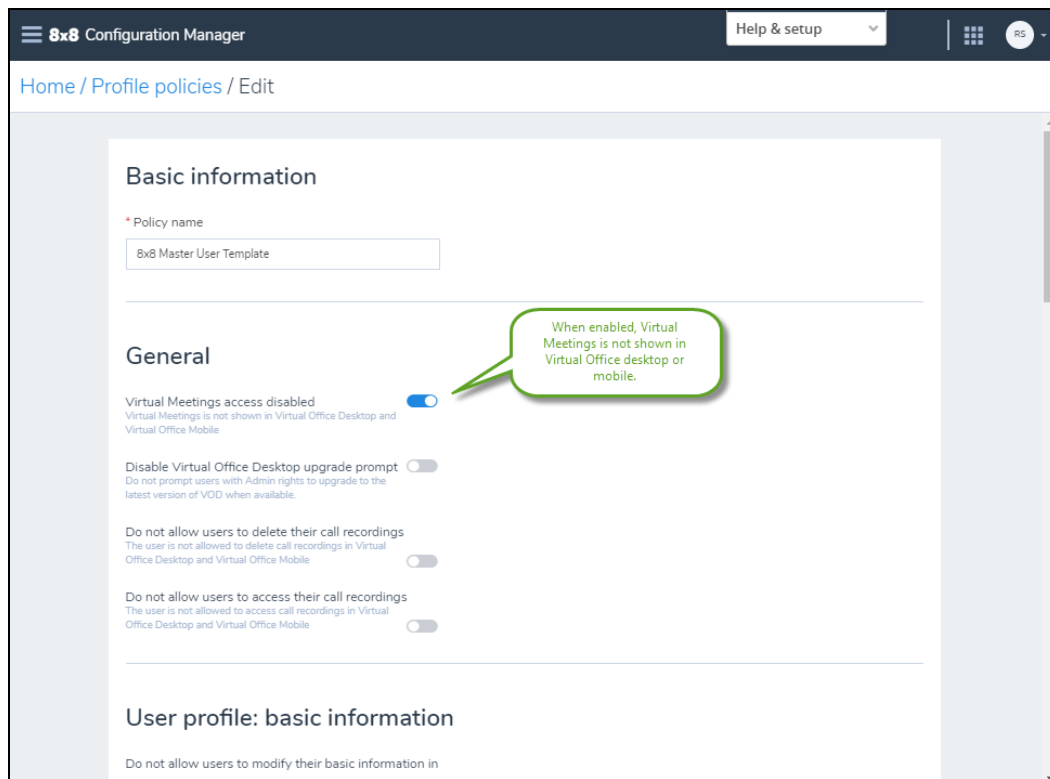
- **Ability to upgrade or downgrade user license (temporarily reverted)**: Due to billing irregularities experienced with upgrading and downgrading user license from the Users page, this feature has been temporarily reverted. You can still work around by deleting the current license and assigning a new license.
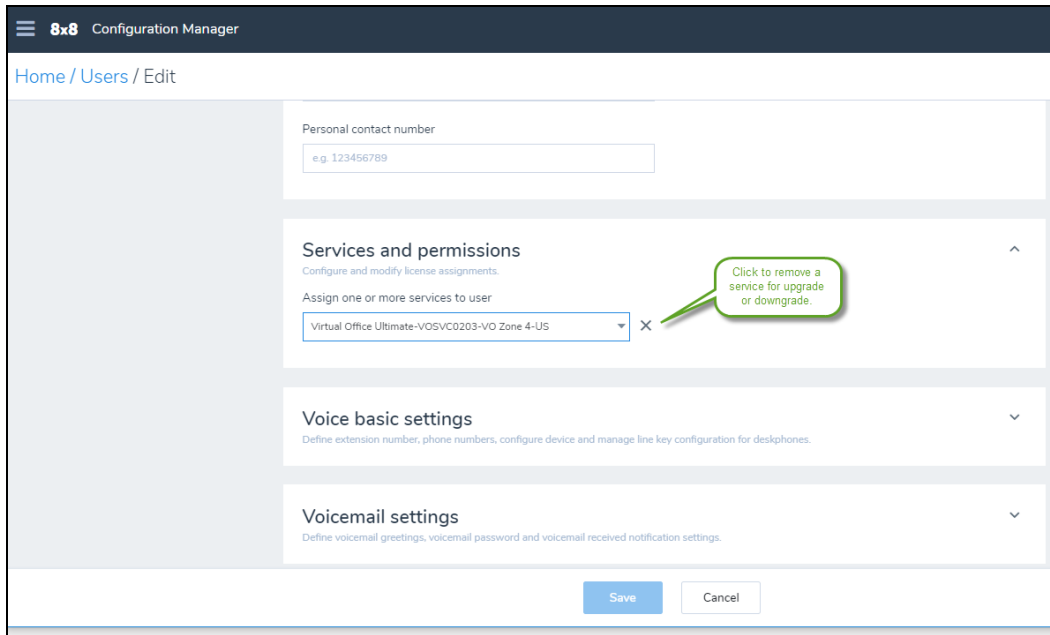
The users Info Panel now displays Services and permissions (licenses) for the user as well as the basic information and voice basic settings related to the user.
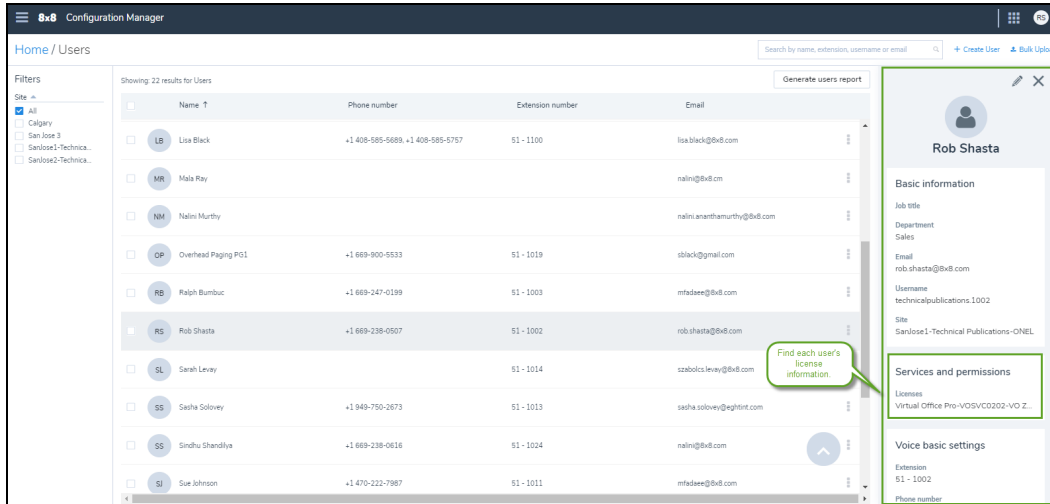
- **Support for bulk removal of porting requests**: To help with larger deployments, you can now select multiple porting requests in pre-porting and porting failed status and remove them at once. To remove pre porting or porting failed numbers, go to
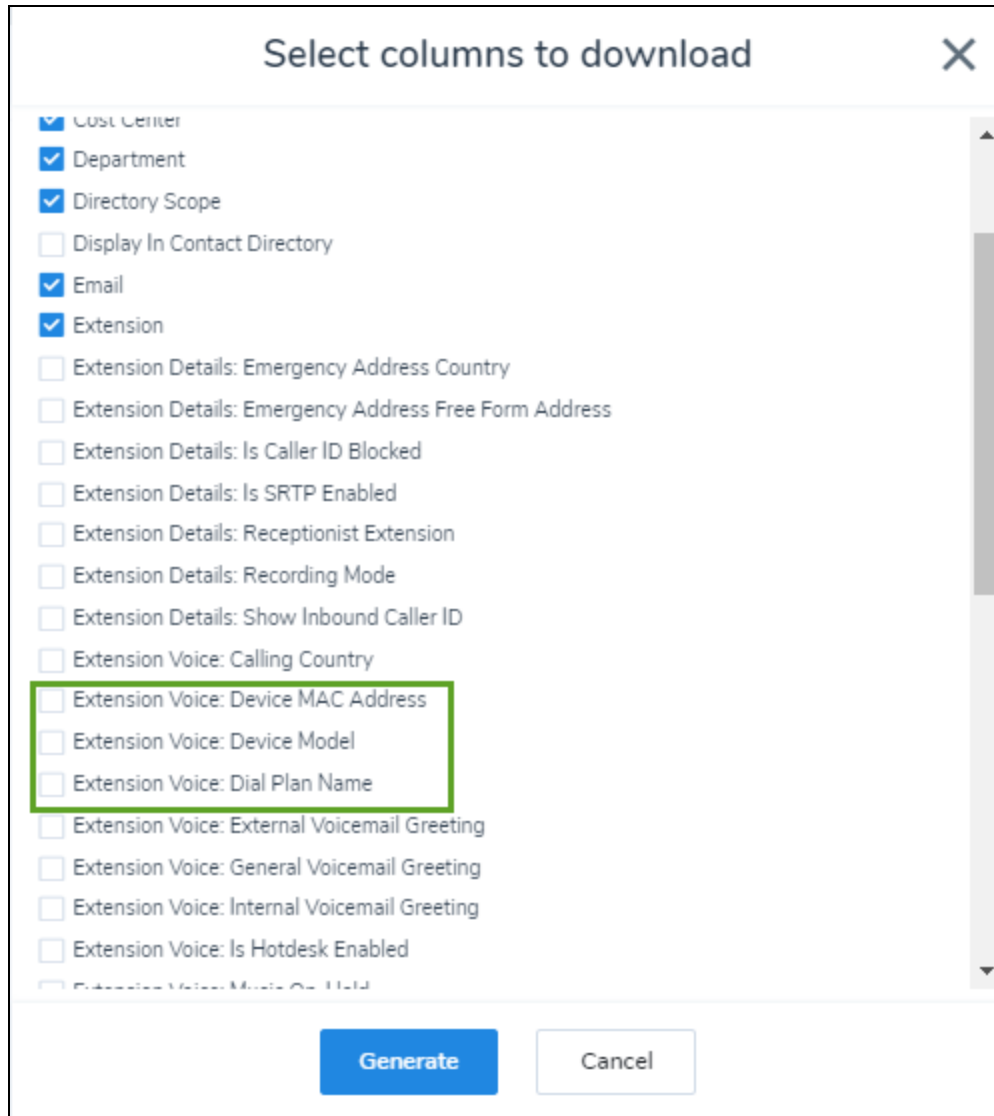
Home > Phone numbers, filter the numbers and click **Remove porting request**.

- **Enhanced user report**: User report now includes more fields such as device model, device MAC address, and switchboard access level, dial plan name, voicemail, notification email and more. To generate the users report, go to **Home > Users** and

click **Generate users report**.

- **Improved access to line key configuration**: You can now access information about which users have Line Keys configured on their phone from the Device inventory page. For a quick and easy access to the Line Key configuration page, go to **Home > Devices**, and click **View device report** next to an activated device that
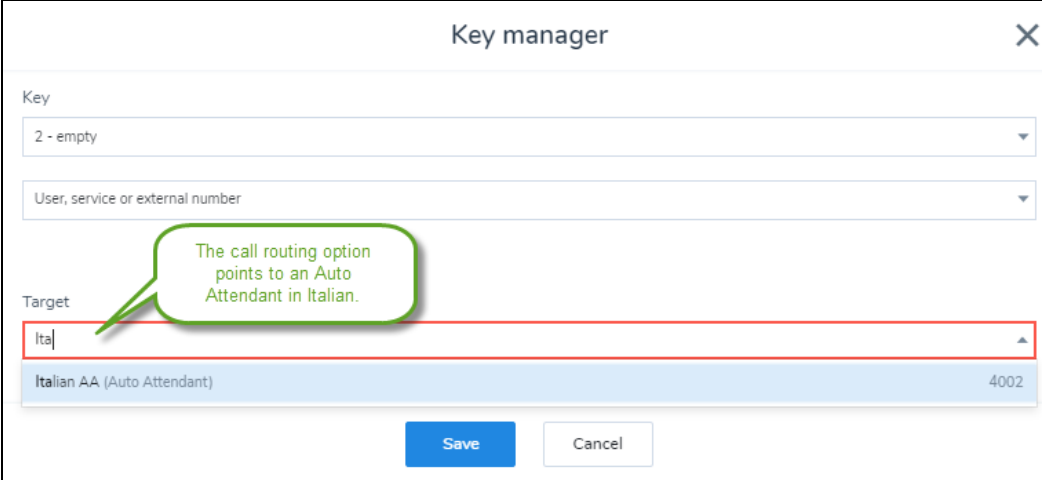
supports Line Keys. You can edit the Line Keys from the Devices inventory page.
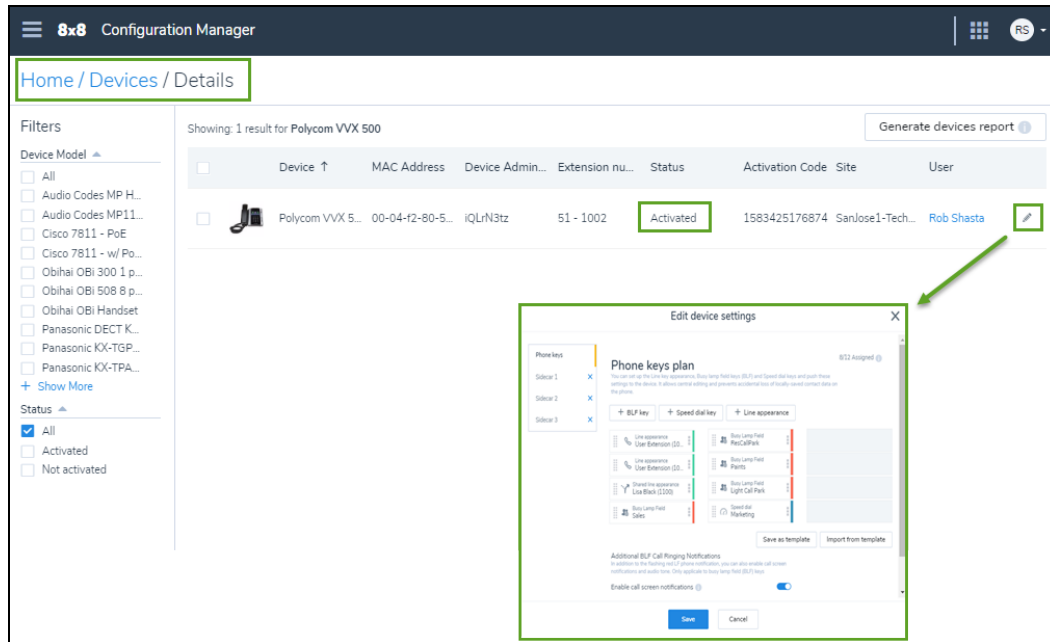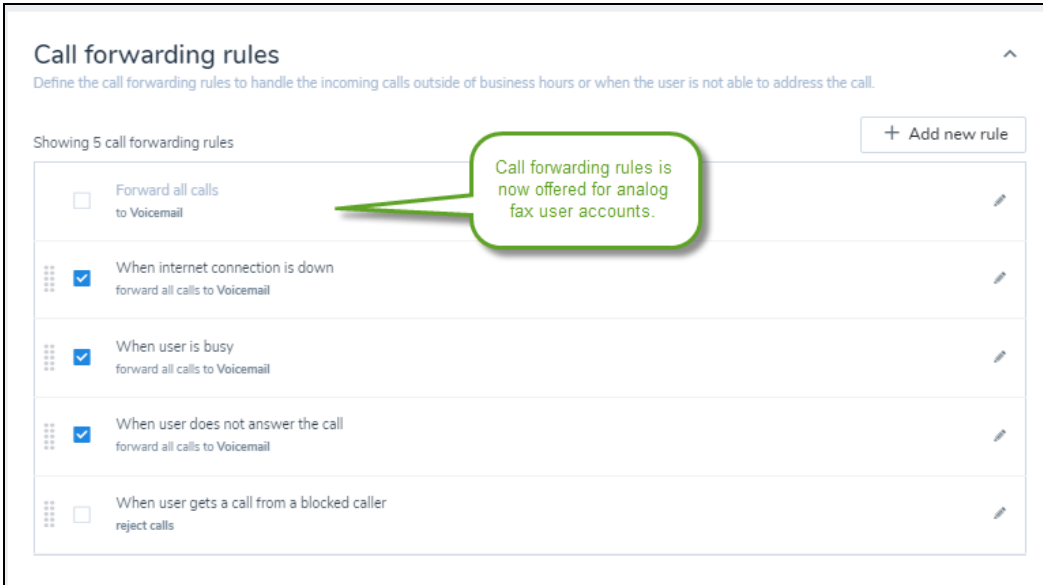
- **Improved Auto Attendants:**
  - **Consolidated call routing key options in target**: While selecting a call routing target for an auto attendant key, the individual transfer options for extensions, call queues, auto attendants, external numbers, and ring groups are now consolidated into a single option. Go to **Home > Auto Attendants > Call Handling Menus** and select **user, service, or external number** for the call routing target.
  - **Ability to point to Auto Attendants in a different language**: Within an auto attendant, you can now select to route calls to auto attendants in another language. For example, you can write: "Welcome to AcmeJets Inc. For English, press 1. For Italian, press 2." The call routing option for key 2 can now point to an Auto Attendant in Italian. Modify your prompt to inform your callers about the language choices. Go to **Home > Auto Attendants > Call Handling Menus** and

search for your Auto Attendant in the target box.

- **Introducing call forwarding for analog fax devices**: You can now forward your faxes from an analog fax machine to another user when the fax machine is broken or not responding. To forward your faxes, you need to set up call forwarding rules for the analog fax machine. Create and save a user with the proper services and permissions for the analog fax machine and assign the analog fax device before you set up the call forwarding rules. See how to set up an analog fax machine.

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- **Improved pagination of call queues page**: Call Queues data is now structured in collapsible sections, facilitating navigation and usability from desktop and mobile devices. To see our new look go to **Home > Call Queues > Create Call Queue** and scroll down to see the collapsible sections.

- **Pagination support for audio files**: You can now navigate easier and have better visibility of the audio files. To access the audio files repository, while editing a user, go to **Music-On-Hold** and click **Change** next to the default audio file. The audio file repository can be accessed from multiple places: Users Edit page, Auto Attendants,

8x8

Ring Groups, and Call Queues. See how to make changes to your audio files.

- **Automatic notification to new admins**: When you promote a user to an admin, the user receives an automatic email notification informing the granting of administrator

privileges.
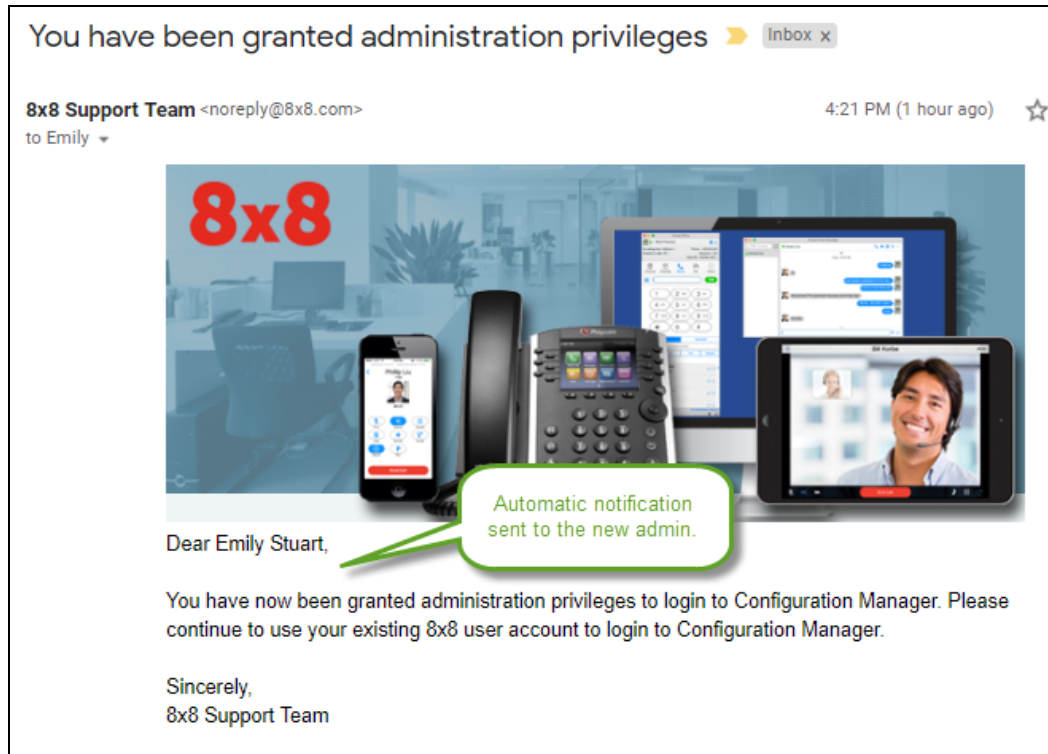
In this release, we have introduced new features and enhancements to improve overall productivity:

- **Support for lunch hours in Auto Attendant schedules**: You can now define lunch intervals during your workdays, exceptions, and holidays, and design dedicated call flows for the lunch intervals. Let's say your business observes a lunch break for all employees at a specified time and would like to direct the call traffic to voicemail during that time, define a lunch break in your daily schedule and set up a call flow in the auto attendant for the lunch break. Whether your business observes multiple open hours, or multiple lunch breaks in a day, you can manage it all with 8x8 auto attendants. To define lunch hour for your business, go to **Auto Attendants > Schedules** and edit **Weekday schedule**. Repeat the procedure for weekday exceptions and holidays. See how to add a lunch hour to your auto attendant

schedule.

To define a dedicated call flow for the lunch interval, go to **Auto Attendants > Call Handling Menus**, and click to configure **Lunch hours menu** by defining a prompt

for the callers and a key to route the calls during lunch hours.

- **Ability to downgrade users licenses**: In this release, you can downgrade a user license or change it to a license with lower capabilities. When you downgrade a user license, the shared settings among licenses, such as phone number, extension number, and call forwarding rules will be preserved. The system automatically changes the features that are not shared between the licenses such as Switchboard Pro or Analytics for 8x8 Work. When you downgrade a user license, for example, Analytics for 8x8 Work automatically changes the user's access level from Supervisor to Essentials. When you upgrade a user license, however, you still need to configure the user profile to allow the new capabilities. In the above example, you need to modify the user profile to allow Supervisor access instead of Essentials when you upgrade the license.

  To downgrade a license, go to **Users > Services and permissions** while editing a user profile. Simply select another license from the list and save the changes. See our previous release regarding the Ability to upgrade licenses via Users page.
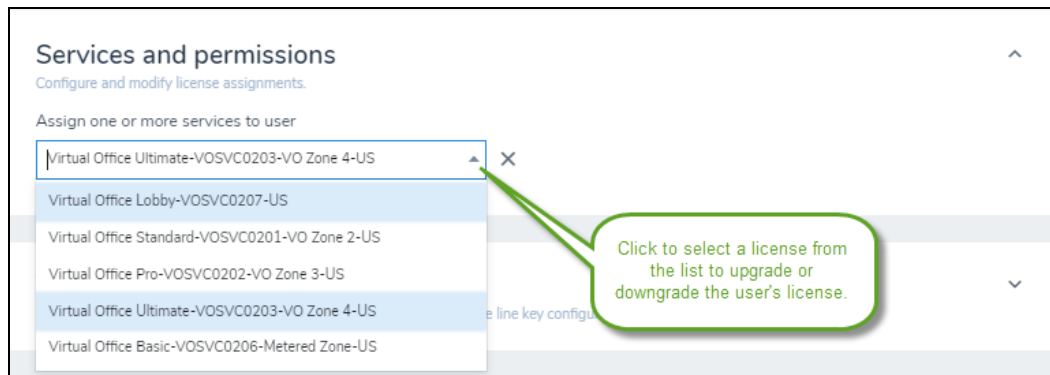
> **Known Issue**: A limitation causes 8x8 Admin Console to return a wrong message when saving a license downgrade for a user, suggesting saving has failed when the changes are being saved correctly.

> **Known Issue:** When changing the license, VOD and VOM may not be automatically provisioned or de-provisioned as the maximum number of participants in a meeting is different among licenses.

> **Known Issue:** The BMW administrator's membership may not be automatically transferred from a license to the other.

- **Enhanced user voicemail greeting**: You can now set up a different voicemail greetings for company contacts and external contacts. You can create an external voicemail greeting, internal voicemail greeting, and general voicemail greeting. For general voicemail greeting, you have two options: either choose the default message that includes the user's extension number, or replace the user's extension number with the user's first name and last name in the default message:
  - **Option 1:** General voicemail greeting by default contains the user's extension number, such as: "You have reached the voicemail of [1002]... "
  - **Option 2:** General voicemail greeting contains recorded first name and last name, such as "You have reached the voicemail of [Robin Shasta]..."

This greeting is also used for auto attendant's voicemail when accessed through the company directory. To access the voicemail settings, go to **Home > Users** and expand **Voicemail settings** while editing a user. See Set up Voicemail Password and Notification.

- **Ability to redirect callers from voicemail by dialing zero**: The callers who reach users voicemail can now dial zero and be redirected to other destinations such as users, call queues, ring groups, or auto attendants. This option gives callers a chance to reach a live person or follow the auto attendant's direction to another department if their original party is not available to take their calls. To redirect the callers from voicemail, go to **Users > Voicemail settings** and enable **Custom 0 Dial out**. Select

a destination from the list and save. See Custom 0 Dial Out.

- **Ability to generate users data report**: You can generate a users report including name, language, license, site, etc., and quickly find the company user's information. You can decide what information to show on your report by selecting or clearing the check boxes of basic and advanced fields. You can simply find the field you are looking for through a search option To generate a users report, go to **Home > Users**,

and click **Generate users report**.

- **Support for automatic notification of service changes**: When you assign a service to a contact (upgrade a contact to a user), or create a new user, the system automatically sends a welcome email to the user. The welcome email includes the user's name, extension and phone number, the phone model, and more.

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To disable the automatic email, go to **Users > Onboarding information** while editing a user, and disable the option to **Send welcome email**.
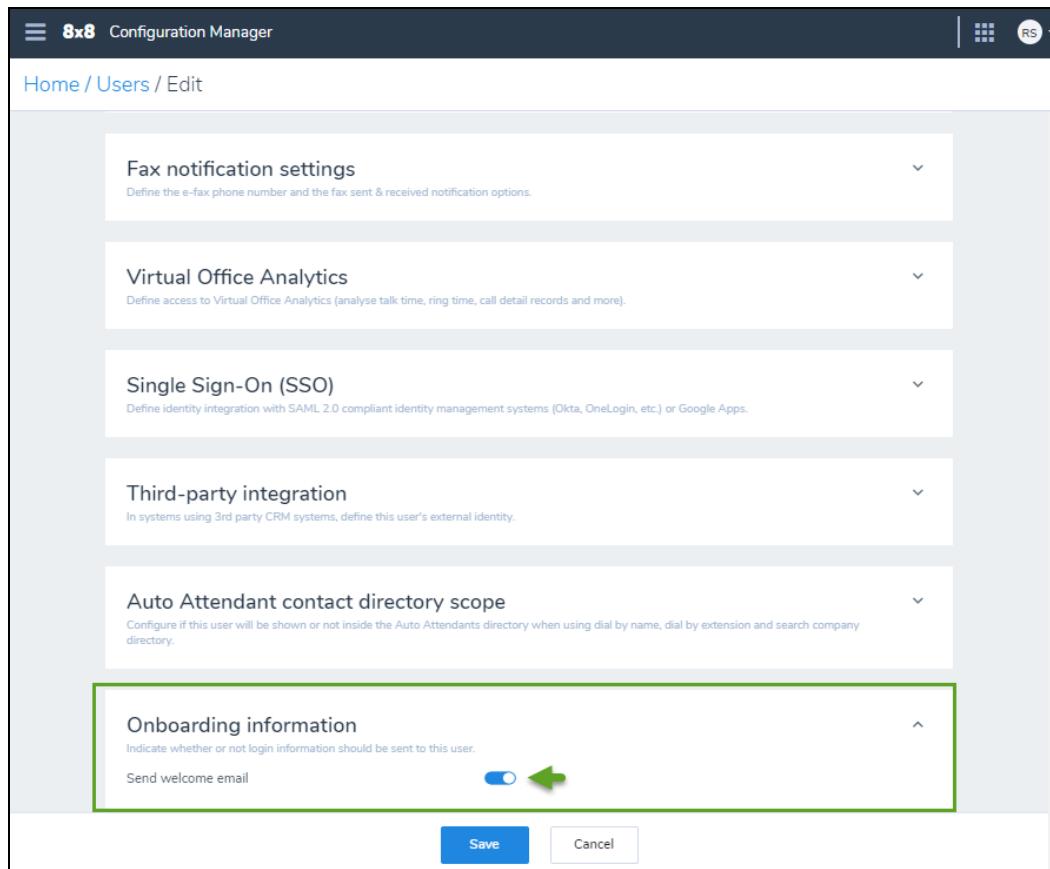
- **Support for custom destinations in call forwarding**: You can now add custom destinations to user's call forwarding rules, allowing administrators to add targets, such as service extensions, to forward the calls to. Let's say you need your users to access the voicemail system by calling into a ring group. The ring group would then send calls to the voicemail system extension 500. By setting the custom destination 500 for the ring group service user, all calls will go to the voicemail as set up for the custom destination. {mf--correct use case?}
  To add a custom destination to your call forwarding, go to **Users > Call forwarding rules** and click to edit **Forward all calls**, add a custom number and save.
- **Ability for administrators to log in call queue members**: Administrators can now log in call queue members to a queue involuntarily. Prior to this release, administrators could only log out the members from the queue. This feature can help administrators monitor the call queue and add members when needed. To log in

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members to call queues, go to **Home > Work Groups > Call Queues** and click **Log in to queue**.

- **Support for Group Paging in Cisco phones**: We now support group paging in Cisco phone models 7811, 7821, 8841, and 8861. Prior to this release Group paging support was limited to Polycom phones. Paging with Cisco phones requires the paging group to have at least one member with Receive option. The Send option is automatically disabled since group members must dial the group paging extension to page other members. To access group paging, go to **Home > Paging** and create or edit a group paging. See Create a Group Paging to learn how to configure Cisco phones.

> **Limitation:** Only emergency paging is supported in Cisco phones. Emergency paging interrupts the group members active calls. Paging extensions are not restricted to who can send a page. {mf--can you explain what this means?}

- **Ability to notify users via email when sending or receiving fax**: You can choose whether a user receives email notifications when they send or receive a fax. The email notification is disabled by default, but you can configure it to be link-only, an attachment, or link and attachment. To set up the fax notification for a user, go to **Home > Users > Fax notification settings**. The updates are both ways, that is, the changes to 8x8 Admin Console updates the user's settings in 8x8 Work for Desktop and the changes made by the user in 8x8 Work for Desktop updates the fax

![8x8]

notification settings in 8x8 Admin Console.

Change of behavior

- **Removed Okta sync back information section from Single Sign-On**: We
  removed Okta Sync Back Information section from Okta Single Sign-On page in 8x8
  Admin Console. The sync back is now done automatically via Okta 8x8 application
  and no more configuration is required by the users. To access Okta configuration

8x8

page, go to **Identity Management > Okta**.

In this release, we have introduced new features and enhancements to improve overall productivity:

- **Refreshed new look for the Users page**: The user data is now structured in collapsible sections, facilitating navigation and usability from desktop and mobile devices. To see our refreshed look, go to **Home > Users** and create or edit a user. Click to expand each section for further configuration.
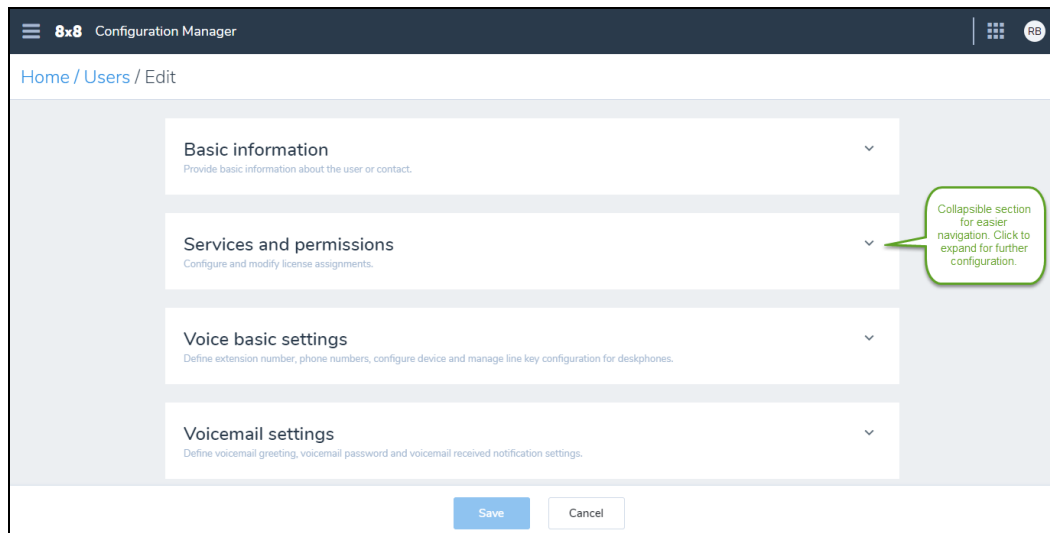
- **Ability to upgrade licenses via Users page**: You can now properly upgrade a user license via user profile. A list of available and active licenses for the tenant are shown under Services and permissions. When a user has no license assigned, you can choose any license from the license drop-down. But when a user already has a license, only the licenses with more capabilities (upgrade) or with similar set of capabilities are shown.

  - To upgrade a user license, go to **Home > Users** and while editing a user, click **Services and permissions**. Select a different license from drop-down, and click to save the user.

8x8
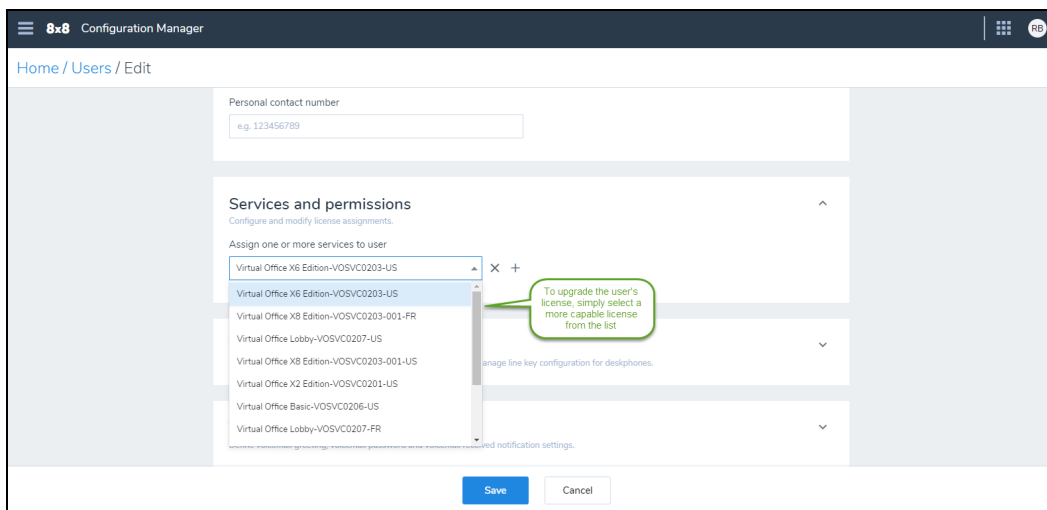
○ If you already have a license and would like to add a second one, such as a 8x8 Contact Center seat, click **+** next to the first license field to add a second field. Select the 8x8 Contact Center license from the list. Click to save the user.
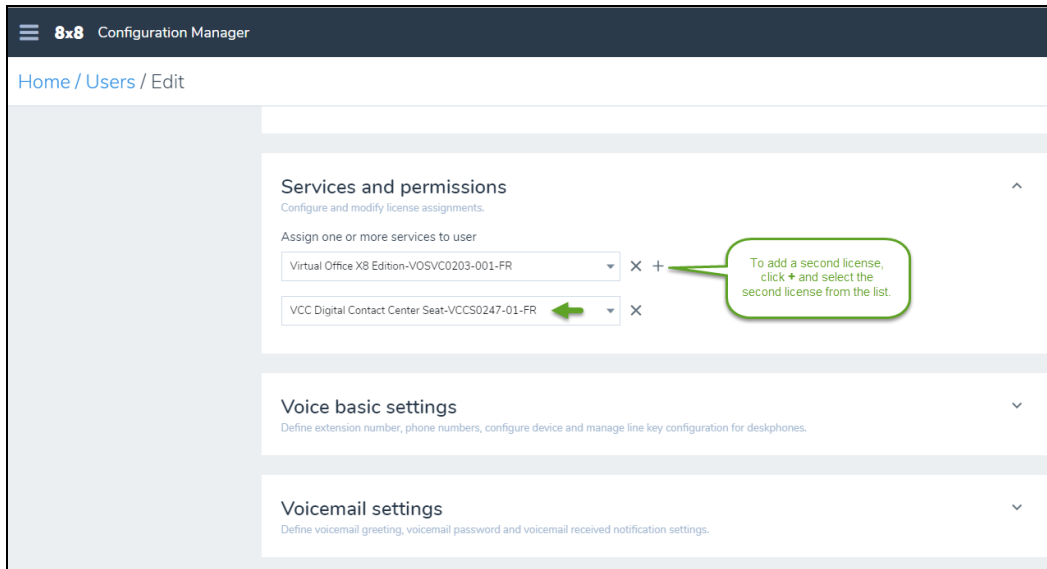
- **Ability to hide a user from the company's directory**: You can now hide users, rings groups, call queues, and auto attendants from publishing in the company's contact directory. If the display option is disabled, the user is no longer visible when searching for contacts. To hide a number, such as an internal fax number, from the company directory, go to **Home > Users > Basic information** and find the service

8x8

user. Click to disable **Display contact in company directory**, and save.
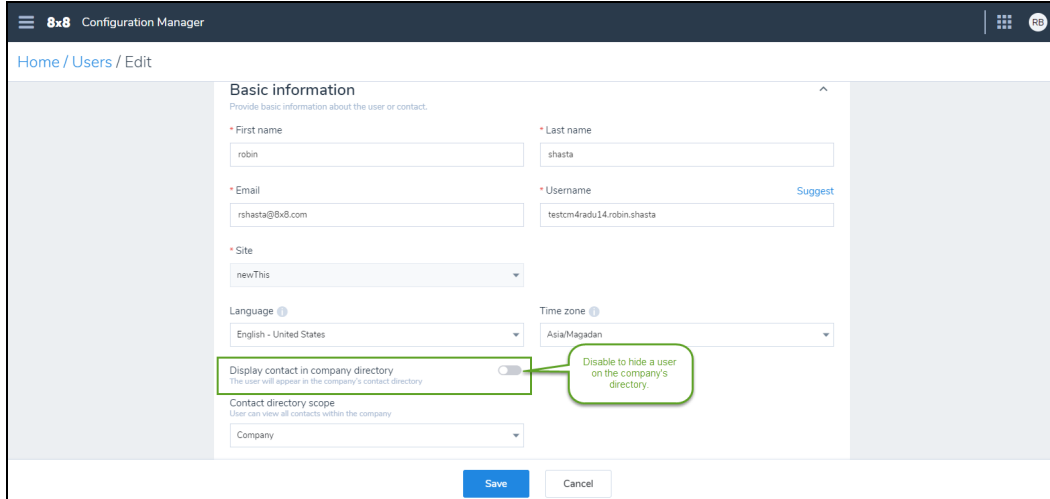
- **Ability to see a phone number's source**: You can now see the source of phone numbers in your tenant. To see whether a number is claimed or ported, go to **Home > Phone numbers** and check out the **Number Source** column. {mf--any particular use case?}
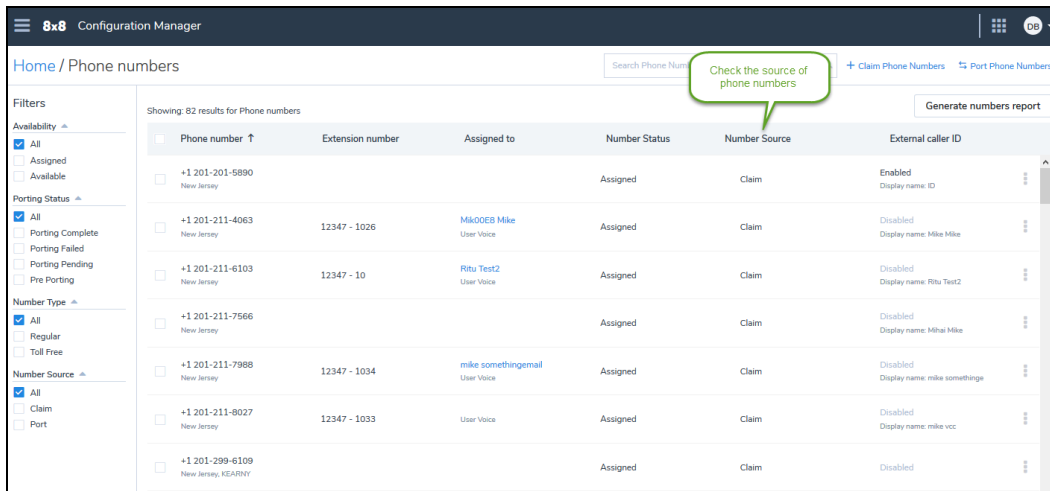
- **Ability to access the pairing pin for DECT handsets via user profile**: You can now see the pairing pin for DECT devices that have a base and a handset. To pair the handset to the base and activate the cordless IP DECT phones, you need a four-digit

pairing pin. The pairing pin is displayed in the read-only field in **Users > Voice basic settings** for easier access and to facilitate the process. The pairing pin is also sent to the user via the welcome email.

To access the pairing pin, while editing a user, go to **Voice basic settings** and select a DECT handset and base. Pairing PIN appears next to the Device model. See our knowledge base article: How do I activate my cordless IP DECT phones.

In this release, we have introduced new features and enhancements, as well as some change of behavior, to improve overall productivity:

- **Introducing power key templates**: You can now save the power keys configuration on a device and copy it to other devices. Simply save the line key configuration as a template and import it to other devices. This saves time and effort in configuring the power keys on devices individually.

  To save a new template, while editing a user, go to **Voice basic settings > Device model**, and click **Line key configuration**. Configure the keys as needed, and click **Save as template**. The new template is added to your system.

8x8
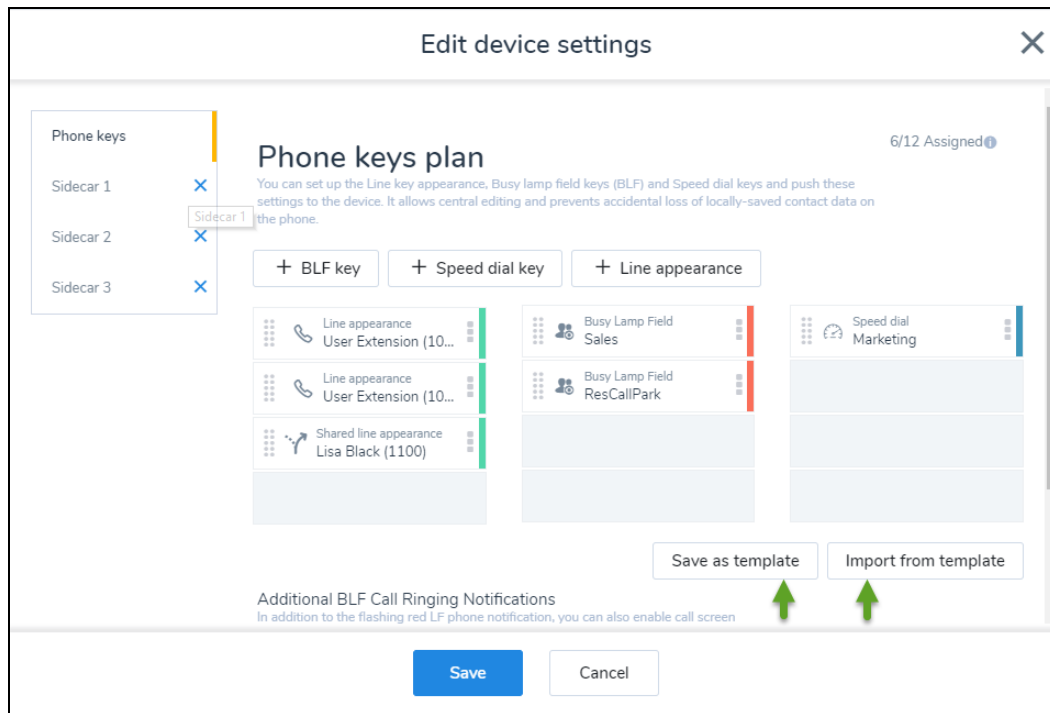
To import an existing template for a new user or device, while editing a user, go to **Voice basic settings > Device model** and click **Line key configuration**. Click **Import from template**. The template is imported for this user or device.

- **Ability to remove porting orders**: You can now remove your porting order for the numbers that failed to port or are still pending porting. It allows users to remove a failed order due to a mistake or incorrect number. When you remove the porting request, the number is removed from your system. The temporary numbers are either returned to 8x8, Inc.or will remain in your inventory as a claimed number.

  To remove a porting order:

1. Go to **Home > Phone numbers**.

2. Filter the numbers by the **Porting Failed** or **Porting Pending** status.

3. Find the number you would like to remove and click ⋮ .

4. Select **Remove porting request** from the menu.
   The failed porting number will be removed from your system following a confirmation message. The temporary numbers can be kept in your inventory as

claimed numbers.

- **Ability to resubmit a porting order**: If you are not happy with any number you have submitted, or if you need to change your order, you can simply make changes to your order and resubmit without going through the complete porting process.
  To resubmit a request, you must:

  - Be in a portable state such as pre-porting or failed stage.

  - Keep at least one telephone number unchanged in an order with multiple porting numbers, or the order will be canceled.

  - Enter the same type of numbers as the original order (for toll-free and wireless orders only).

  - Do not change the service provider.

  To resubmit a porting order:

  1. Go to **Home > Phone numbers**.

  2. Filter the numbers by **Porting Failed** or **Porting Pending**, and click next to a number.

  3. Select **Resubmit porting request**.

4. Edit the order number and click **Continue**. See Port your existing phone numbers.

- **Ability to remove call park extensions**: You can simply delete a call park extension, that you have no use for, from the list of extension numbers. When you delete a call park extension, the power keys pointing to the extension number become invalid. To delete a call park extension, open **Extension numbers** and find the call park extension to delete. Click ⋮ , and select **Delete**.

- **Ability to view port assignment for DECT bases and ATA terminals**: You can now view the port assignments on a DECT base or an ATA terminal unit and inspect what ports are assigned to users. To see the port assignment on a DECT or ATA device, go to **Home > Devices** and click **View device report**. Click any device on the

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list to open the device's Info Panel. You can view the number of ports and the port assignments.
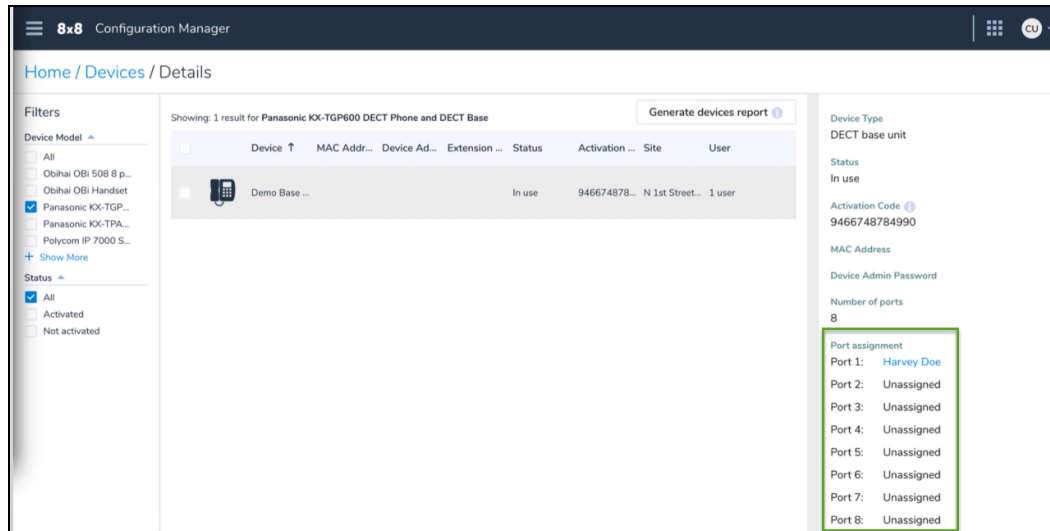
- **Ability to contact 8x8, Inc. Support directly from within the application**: Users can now contact the support team at 8x8 directly from 8x8 Admin Console. You can open and review your support cases, report operation issues, or ask questions regarding your system. This service only applies to 8x8 customers at this time. 8x8 Partners are excluded. To access support link, click **Contact support** from the top header.
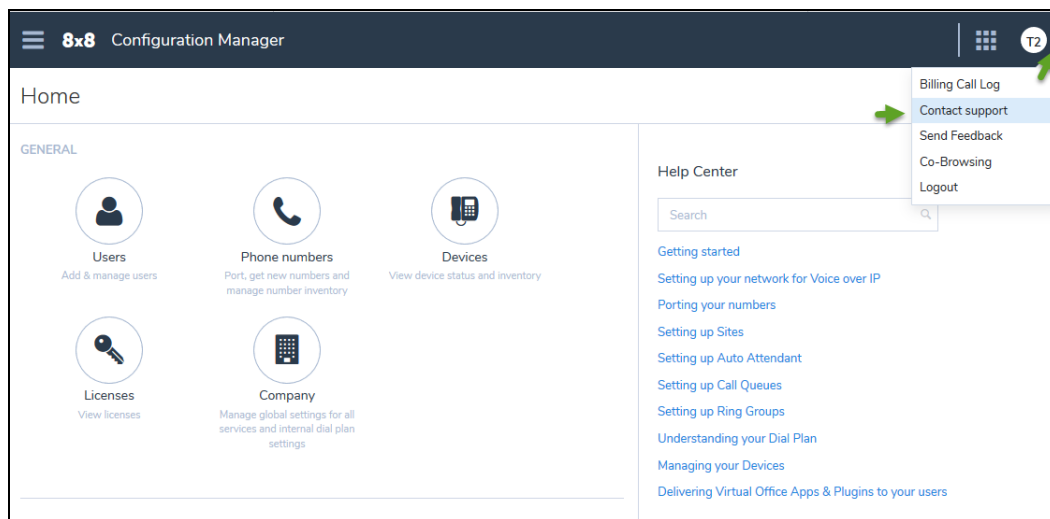
The support portal page opens including instructions of how to submit an online case

8x8

or see your existing support cases:
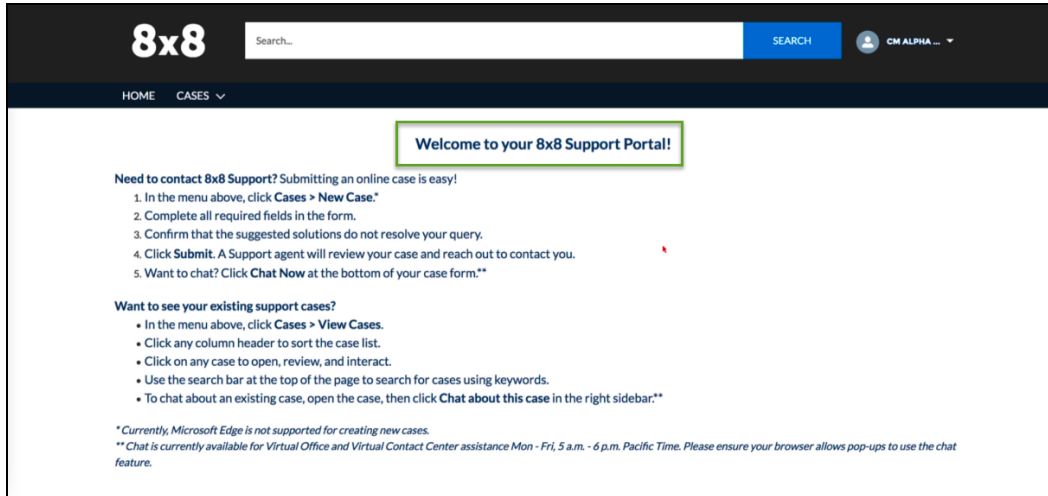
Change of behavior

We have changed the behavior of the following features:

- **Ability to select a user's Virtual Office or 8x8 Contact Center extension for BLF targets**: When creating a BLF target, you can now select either VO or VCC extension for users who have both licenses. To add a new BLF key, click **Line key configuration** while editing the user. Click to add a **BLF key** and search for the user to monitor. Notice that you can see both user's extensions under **User to monitor** for the users who have both Virtual Office and 8x8 Contact Center licenses.

- **Ability to enter custom destinations for speed dial**: You can now add custom numbers for speed dial. We provide support for +,-,*,# characters and digits. For example, for an international number, you can enter +985555555555. Notice that the label field matches the Dial to field.
  To add speed dial custom destinations, while editing a user, click **Line key configuration > Speed dial > Dial to**. Enter the custom number and click **Save**.

- **Ability to filter sites on auto attendants page**: Customers with multiple sites and a large number of auto attendants are now able to filter the auto attendants based on their sites. This enhancement helps them paginate and locate their auto attendants

8x8

quickly. Go to **Home > Auto Attendants** and click to filter per site.

- **Ability to select DECT bases and ATA terminals on large accounts**: You can now select the DECT base and ATA terminals in large account with more than 200 devices for better filtering. To select the DECT base and ATA terminal, the user must have a DECT or ATA device assigned. Go to **Voice basic settings > Base device** while editing the user and look to find a base or ATA terminal from the list. See how to assign DECT phone to users.

In this release, we have introduced new features, and enhancements to improve the

overall productivity:

- **Enhanced visibility to device details**: In the Devices page, we have introduced the Info Panel that presents the device information such as: device type, status, activation code, MAC address, and more. Info Panel allows a quick visibility to the device details. To access the Info Panel, go to **Devices**, and click **view device report** to open the Details page. In the Details page, click any device on the list to view the device details in the Info Panel.

- **Improved notification for failed number porting**: Upon submitting your porting request, we immediately notify you about the failed porting requests by showing the status and reason for failure. We provide a temporary number for each successfully ported number. See the porting order results by going to **Home > Phone numbers > Port Phone Numbers >Summary page**. Resolve the issue and click **Restart the**

porting process.

- **Ability to disable Secure Real-time Protocol (SRTP) for 8x8 Work users**:
  Transport Layer Security (TLS) and Secure Real-time Transfer Protocol (SRTP) are
  standard protocol for securing VoIP traffic. SRTP is enabled by default for all devices.
  To disable the SRTP, while creating or editing a user, go to **Home > Users > Voice
  Basic Settings**. Make sure you have a device selected such as Polcom VVX 301.

Disable **Enable Secure Real-time Protocol** and save the changes.

In this release, we have introduced new features, and enhancements to improve the overall productivity:

- **Enhance call forwarding rules**: You can now forward incoming calls to voicemail, users, or numbers when a user does not answer the call. The call forwarding rule is automatically set to 15 seconds but allows you to change the duration. When creating or editing a user, open **Users > Advanced Settings > Call Forwarding** and edit the value for **When user does not answer the call**.

- **Improved notifications for power keys in Polycom devices**: In Polycom devices, in addition to the flashing red light phone notification, you can now enable call screen notifications and audio tone for power keys.

  ○ If you enable **call screen notification**, full splash screen alerts you when an extension rings.

  ○ If you enable **call audio tone for incoming calls**, you hear an audio tone when an extension rings.
    To enable notifications, while editing the users, go to **Users > Voice Basic Settings > Line key configuration** and enable options under **Additional BLF Call**

Ringing Notifications.
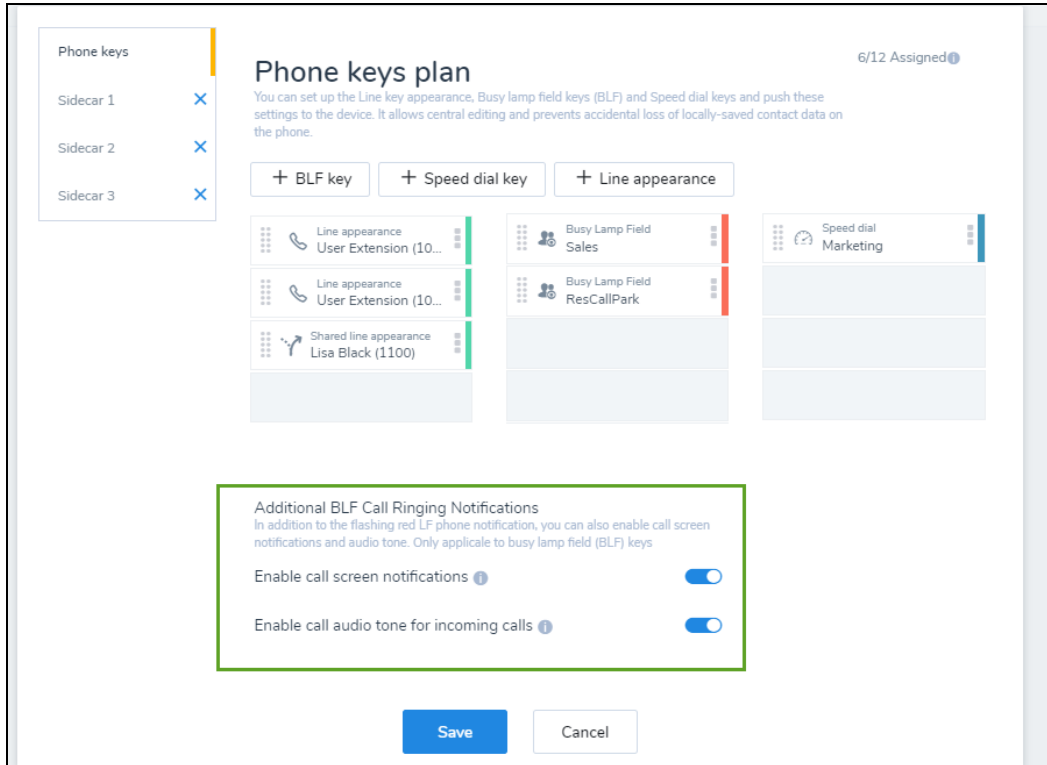
- **Enhanced call queues to alert members about incoming calls**: We have now added a new setting to alert the call queue members about incoming calls. If a call queue member does not answer the call within the specified time (maximum 30 seconds), the user is considered unavailable and the call is moved to another member, or back to the queue. To enter alerting time for a member, go to **Call Queues > Basic Information** and enter a new time for **Total time to alert a**

member. See Set up a call queue.

- **Ability to search and filter phone numbers by a rate center**: While claiming a new phone number, you can filter and look for numbers by specific rate center. Rate center is a geographically-specified area used for determining mileage or usage dependent rates in the public switched telephone network. To filter by the rate center, go to **Phone Numbers > Claim Phone Number** and select **Filter By > Rate**

center. Click **Search** to get the result.

- **Improved Okta configuration page in 8x8 Admin Console**: We have now added helpful descriptions and decoupled two sections: User Provisioning Information and Okta Sync Back Information. To access Okta configuration page, go to **Identity**

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Management > Okta.

- **Enhanced ring group configuration**: We have added pagination for ring group filters. The ring group name and extension is now set as default for the ring group caller ID. To access the ring group caller ID, go to **Ring Groups > Ring Group**

8x8
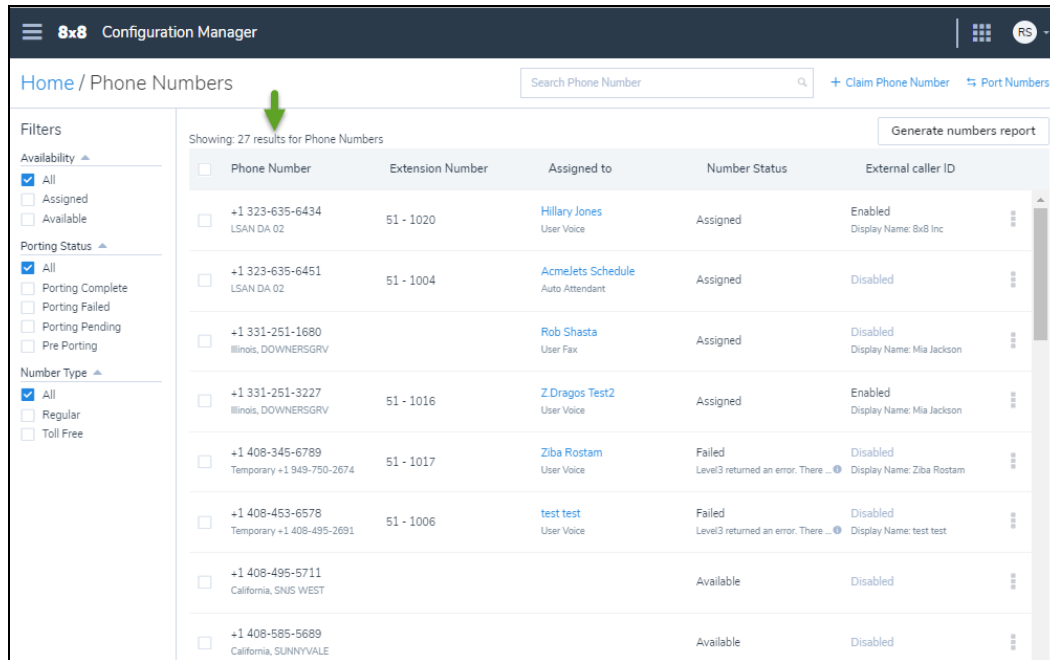
Caller ID and choose or change the default.
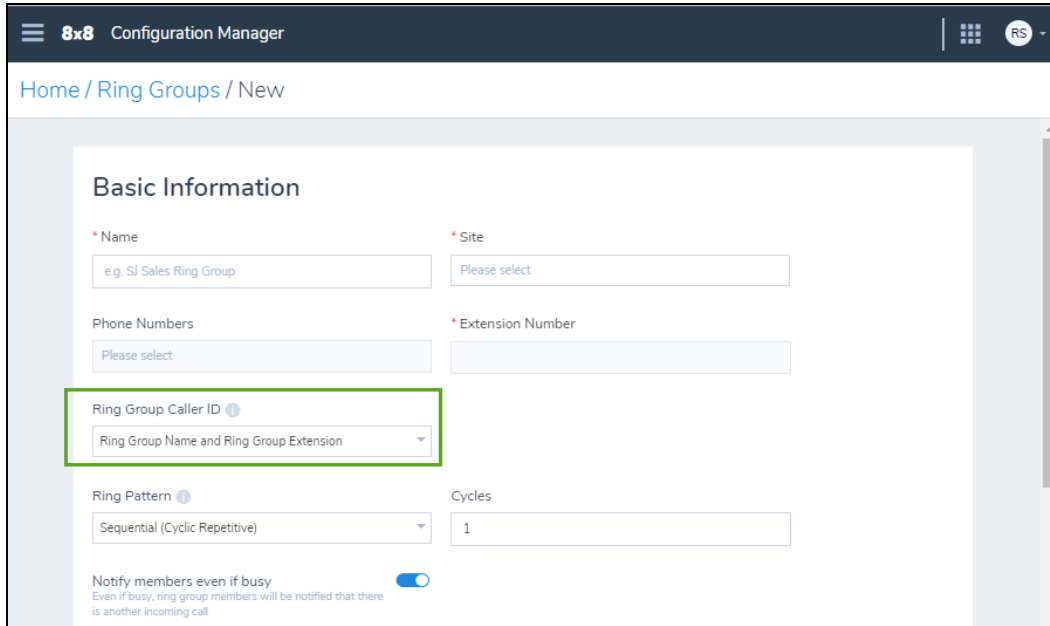
- **Ability to generate a phone number report**: You can now generate a report that lists all phone numbers, assigned or available in your phone system. Find out the list of ported numbers, or numbers that are pending porting, or those that have failed porting by using the relevant filters. The report includes the phone number, type, location, extension, and more. To generate numbers report, go to **Phone Numbers**, set a desired filter, and click **Generate numbers report**.

8x8
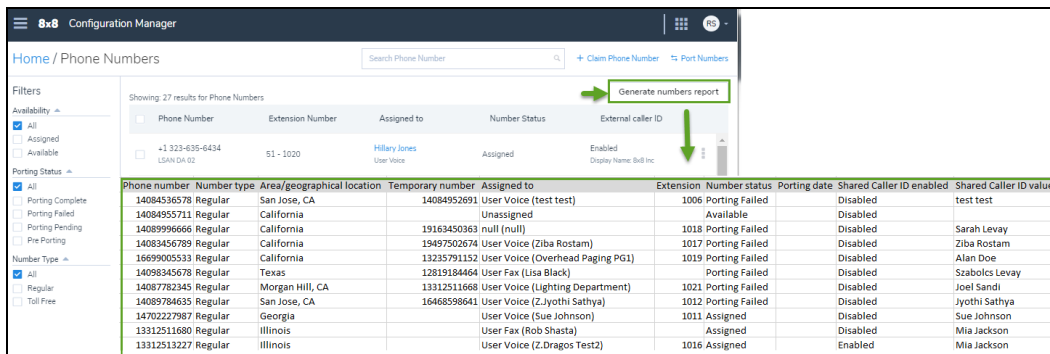
- **Improved sorting of phone numbers**: Phone numbers now appear in an ascending order helping you to locate a number easier. To see the list of phone numbers, go to **Home > Phone Numbers**. The sort order cannot be changed.

- **Added support for additional countries**: You can now add addresses from a wide range of countries such as: Anguilla, Barbados, Bahrain, Brazil, Bahamas, and more. To see the complete list of countries, see Appendix A. To create or edit an address, go to **Users > Basic Information > Address**, and select **New Address** from the list. The list of countries can be also accessed from site address, emergency address,

8x8

porting process, and number claim.

8x8

porting process, and number claim.

Get started

Congratulations on signing up for 8x8 8x8 Work phone service! Open the welcome email from 8x8 8x8 Work in your inbox and follow the instructions to log in to 8x8 Admin Console. Whether it is setting up your company phone system or contact center, you can do it all using the 8x8 Admin Console.

Using 8x8 Admin Console, you can manage your:

- 8x8 Work phone system, users, queues, devices, and more
- 8x8 Contact Center users, queues, channels, and more

8x8 Admin Console for 8x8 Work

This is your primary tool to set up your 8x8 Work phone system. It allows you to set up the main contact center entities, such as adding users, administrators, and assigning phone numbers, extensions, and devices. Use this application to set up your company's 8x8 Work phone system.

As a phone system administrator, when you purchase 8x8 Admin Console from 8x8, a phone system is automatically created. Depending on the size of your business, you may need only one or multiple phone systems; one for each country, for example. When your business account is created, it comes with the required license for the services you have purchased, such as a lobby extension or business extension. You then receive a welcome email with the necessary login credentials. Log in to 8x8 Admin Console to start.

When you log in to your 8x8 Admin Console account, you must review and edit your dial plan, and set up sites. The dial plan influences the length of your extension numbers, site code and PBX dialing code. Once your dial plan and sites are ready, follow the tasks below to get your services up and running:

1. Get telephone numbers: Claim new phone numbers for your business, or transfer your existing numbers from another service provider to 8x8.

2. Set up users with apps and phones: Having claimed or ported phone numbers for your business, you are now ready to identify your company employees and assign them phone services to enable communication.

3. Set up professional greetings and voice menus: With 8x8 auto attendant, you can set up automatic call handling without the need for a human operator, whether for standard business hours, holidays, or emergencies. Callers can now direct themselves to the desired destination using automated voice prompts.

8x8 Admin Console for 8x8 Contact Center

This is your administrative tool to manage and configure 8x8 Contact Center users, queues, channels, and more. In preparing to add users and administrators to your contact center, we recommend performing the following tasks to ensure a smooth workflow:

- **Review contact center licenses: Allows you to understand the available 8x8 Contact Center user licenses.**

- **Check your claimed and ported numbers: Allows you to claim or view the claimed numbers, and submit porting requests as well as check the porting status. You will assign these numbers as voice channels to agents.**

- **Manage your device inventory: Allows you to add 8x8 supported devices to your contact center and phone system. Use these devices to assign a dedicated extension to an agent.**

- **Review VCC enabled sites: If your phone system includes 8x8 Contact Center services, it is important to understand the relation between a VCC tenant and the phone system. A VCC tenant is linked to a single PBX only; The PBX to which a VCC tenant is linked to is referred to as VCC enabled. If your company phone system has multiple PBXs, you must look up the PBX that the VCC tenant is linked to from the Company page.**
  - **When you create a site which includes VCC users, you must ensure the site belongs to the VCC-enabled PBX.**
  - **When you create a VCC user, you must assign the user to a VCC-enabled site only.**

Log in
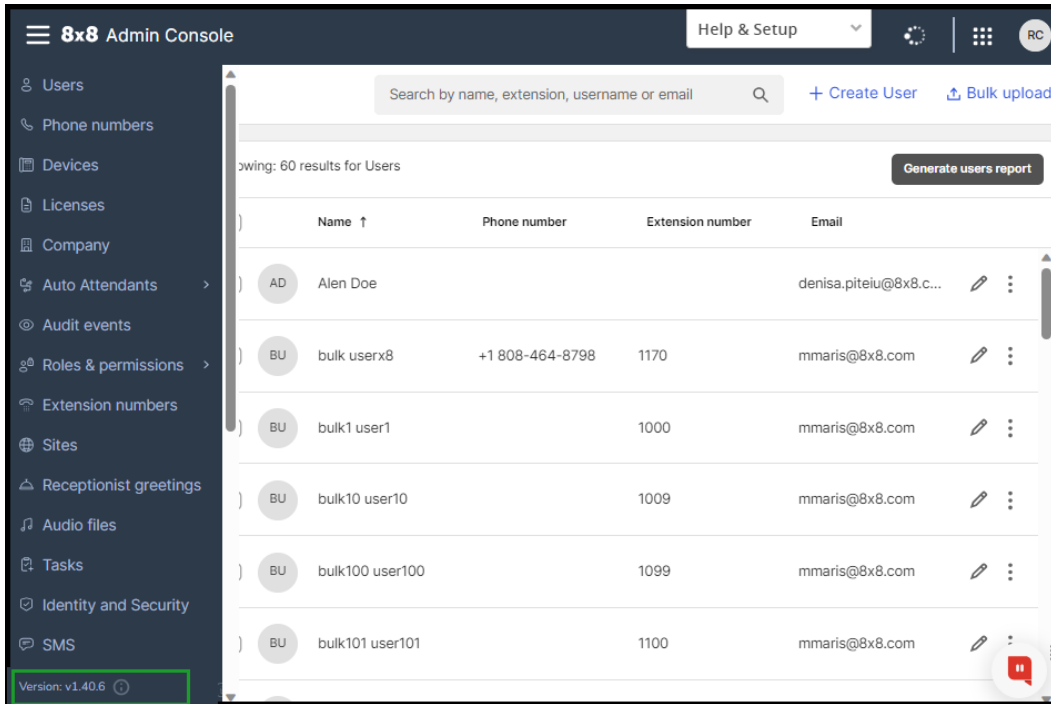
To review contact center licenses, create users, and assign voice channels to the users, you must first log in to 8x8 and then perform these tasks in the 8x8 Admin Console.

1. **Go to https://login.8x8.com.**

2. **Enter your user credentials and click** Login.

3. **In the** 8x8 Application Panel **page, click the** Admin Console **tile to access the 8x8 Admin Console administration portal for managing the 8x8 services , including users and telephony features.**
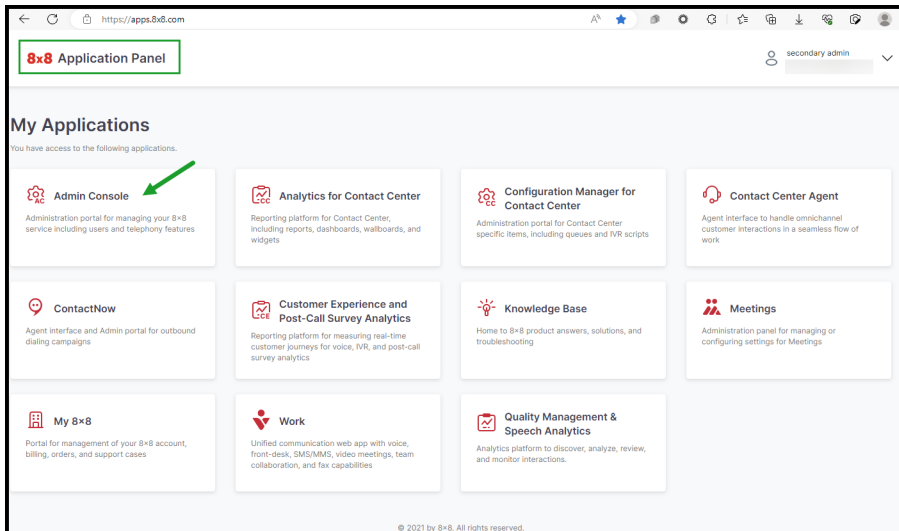
> **Important! To ensure security standards, 8x8 apps now enforce multi-factor authentication (MFA) for all 8x8 administrator accounts. For details about MFA for admins, read Multi-Factor Authentication (MFA).**

Check the 8x8 Admin Console application version

Wondering which version of the 8x8 Admin Console application you are accessing? Simply click to open the main menu and find the version number at the bottom of the menu.

Log out

To log out the 8x8 Admin Console, click ⬇ on the top header and select **Logout**.

8x8 Mobile Admin

Recently, we introduced 8x8 Mobile Admin, a new solution designed for 8x8 Work admins to manage basic admin activities using the 8x8 Work for Mobile app. This new capability offers quick resolutions via the mobile app as well as easy and quick access to a restricted set of top level daily admin tasks (quick updates or changes on demand).

As admins, often you need to check on system status or quickly change user/device level settings or perform minor configuration changes on auto attendants, call queues or ring groups. Through the 8x8 Mobile Admin app, you can act on these easily and quickly, without having to log in to the web app. Simply launch the mobile app and log in using your admin credentials to access the admin dashboard.

Availability

8x8 Mobile Admin is available on:

- iOS mobile devices
- Android mobile devices

To learn more about 8x8 Mobile Admin, check out our detailed help.

Features

As an 8x8 Work app admin, perform the following basic admin functions using a new admin dashboard in 8x8 Work for Mobile:

- Track usage metrics and monitor quality: Track number of sites, users, licenses, and phone numbers in a snapshot.
- Manage basic configuration options: Manage configuration on existing Auto Attendants, Call Queues, and Ring Groups.

- Perform basic user administration: Deactivate, reactivate and delete user accounts.

- Manage status notifications: Send and receive push notifications about platform services status updates (outages announcements or incidents), directly via the mobile app.

- Search for users - If you are logged into 8x8 Work for Mobile as an admin, you have the ability to search for a user directly from the Mobile Admin Dashboard.
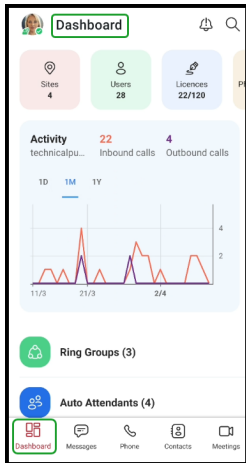
Set up your network for VoIP

Before installing Voice-over-IP (VoIP), it is important to verify that there is adequate Internet bandwidth to support it, a properly configured Quality of Service (QoS) router for call quality, and a battery backup to protect you from power outages.

- **Bandwidth**: Determine how much bandwidth you need for your VoIP in your network. Your network must have sufficient capacity to carry the VoIP traffic.
- **Router**: 8x8 recommends the use of a router with QoS capabilities to prioritize delay-sensitive voice and video traffic. A high-quality router increases your call quality.
- **Quality of Service**: QoS can have a significant impact on the audio (and video) quality of your VoIP phone system.
- **Power outage**: VoIP fails when the power goes out. A battery backup system and a power-over-Ethernet switch can save you during power failure.

8x8 top 10 network implementation best practices

8x8 provides the following best practices for implementing or troubleshooting your 8x8 service. These suggestions are for all sizes of networks and number of customers. Some may not apply to smaller deployments.

Do the users in your company use the 8x8 Work for Desktop, 8x8 Work for Mobile, or physical IP phones on their desks? Knowing the answer helps you concentrate your efforts on your wireless or wired network.

The more you know about your network, the better prepared you are to properly integrate VoIP. Start from your local network to your WAN.

- If users are serviced via wireless network, make sure you have plenty of access points (AP) to service all corners or workplaces, and that the Wi-Fi access points are not overloaded. When moving from Wi-Fi AP to a different AP, the hand-off must be performed properly.

- If users are using physical phones, or if the workstations are serviced via wired network, make sure you have all prioritization for voice traffic over data.

- Review current WAN bandwidth levels, traffic flows, and existing switches for bottlenecks and choke points. Then, identify or determine specific needs through testing and modeling. This helps you identify any trouble points or bottlenecks in your network.

There are a variety of metrics you can use to assess 8x8 call quality, including jitter, MOS, R-Factor, gap density, burst density, QoS prioritization, and compression techniques.

Implement QoS for the ingress and egress data traffic on your network, and ensure all LAN devices adhere to it. [

Organize your VoIP and data traffic by VLAN groups, in order to resolve issues more easily.

Ensure there are no issues with these three Key Performance Indicators (KPI), as they represent the highest impact to your call quality. Many times these KPI issues are caused by external upstream carrier issues that may require you to open tickets with your Internet service provider. Bufferbloat is high latency in packet-switched networks caused by excess buffering of packets. Bufferbloat can also cause packet delay variation (also known as jitter), as well as reduce the overall network throughput. When

a router or switch is configured to use excessively large buffers, even very high-speed networks can become practically unusable for 8x8 voice traffic. Some communications equipment manufacturers placed overly large buffers in some of their network products. In such equipment, bufferbloat occurs when a network link becomes congested, causing packets to become queued in buffers for too long. In a first-in first-out queuing system, overly large buffers result in longer queues and higher latency, and do not improve network throughput.

For comprehensive understanding of your network traffic, capture and store network data before implementation, shortly after deployment, and again a month or so after deployment. With these three data sets, you can spot data trends in the performance of your network. Baselining validates 8x8 performance, helps future capacity planning efforts, and gives you a long-term understanding of your 8x8 service.

Headsets can vary in price and performance considerably. The best headset for your situation varies based on whether desk phones or softphones are being used, and on the environment they are being installed in (such as the level of background noise). Some people prefer the freedom of wireless headsets, though it usually comes at a considerable price premium. In addition, the battery life of wireless headsets must be considered, as they are not primarily designed for call centers where they are in use all day. PC headsets have the further consideration of their connectivity mechanism, such as USB or headset jack. Headsets which connect using a headset jack typically lack the features of more advanced USB headsets, which may have built-in noise reduction and echo suppression. If you use headphones with headset jacks, the minimum specification for the PC sound card must include echo suppression. Telephony headsets are usually more expensive than their PC equivalents, though not always with any justification. When buying headsets for desk phones, check whether the phone actually has a dedicated headset port, as without a port, the headset also needs a separate amplifier. 8x8 has no particular recommendation for which headsets to use.

8x8 recommends that ALG be disabled on all your network gear, as it is known to cause

the 8x8 solution to not perform correctly. For details on ALG and possibly solutions for disabling, please refer to the ALG support page.

If you are using both a PC and a phone on a single network run, ensure that your network switch can properly handle the number of devices. Minimize daisy-chaining of network switches if you are using more than one switch; each must have a direct link to the core or edge device. All connections and links must be at least 100 Mpbs full duplex.

8x8 network utility

This is a useful utility to check your network configuration and check your connection quality. Please refer to the links below for more information. You can contact your 8x8 engineer to get license keys to use this utility. To install the utility, go to the 8x8 Network Utility download page. To learn more, please refer to our Network Utility and Diagnostics user guide.

FAQ

Refer to the following frequently-asked questions for more information:

Enabled ALG on your edge device or other network gear is the most likely cause of failed phone registrations. This may be represented in the device that simply fails to register altogether, or intermittently loses registration. The failed registration may also be caused by ports 5060-5061, 5196-5199, and 5299 being blocked.

Assuming the phone is registered, a lack of audio can be caused by a number of problems:

- If you are not using a headset, make sure that the headset is operating, the volume is turned up, the microphone mute button is not selected, and the headset is not engaged.

- If you are using a headset, it is recommended to test with a handset or speaker to ensure the sound issue is not headset-related.

While using 8x8 8x8 Work, go to **Settings > Audio and Video**; you can verify that there is audio transmitting being received using the indicator bars, and that the proper audio device is selected. You can also use the 8x8 audio quality testing service, which allows you to speak a short phrase, records it, and plays it back to you.

For Polycom phones, however, go to **Menu > Status > Diagnostics > Media Statistics** in the phone to see the packet information. During an active call to see real-time information about your call, use the packets transmitted (Tx Packets) to see this number increase rapidly when speaking; this indicates the phone is receiving audio and sending out to the network. The receiving (Rx Packets) indicate that packets are being received by the device; if this number increases when speaking, then the issue is most likely with the handset, cord, etc. If this number does not increase, the usual suspect would be a firewall issue or ALG. These issues can also be identified by testing with the 8x8 Network Utility tool.

Gaps in sound occur when jitter exceeds 8x8's recommended maximum of 20 ms, packet loss exceeds 0.3%, or both. Depending on how delayed the packets are, you may experience robotic sound as the Codecs try to interpret what sound must be played for the missing data. If the packets are completely lost, no sound plays, since the number of missing packets exceeds the approximation.

Phone echo is caused by signals bouncing back from analog phone lines (only two wires). Echo cancellation in digital equipment must detect transmitted sound that is received back, and cancel it out.

In addition, make sure that users lower their microphone gain as much as possible. If the microphone is far from the mouth, the software driver compensates by raising the gain, which causes echo when it picks up sound vibrations from the earpiece on boom microphones. Ideally, you must first turn off any auto gain feature, as it can cause gain to go up and down during the call, and then you should set up with a test call.

If echo is still experienced, it is possible that the latency on the connection to 8x8 exceeds the recommended maximum of 100 ms.

Voice (real-time) communications are very sensitive to latency and variation in packet arrival times. 8x8 requires steady, dependable delivery receipt of voice packets to provide excellent call quality. Packets arriving too early, too late, or out of sequence result in jerky and jumbled communications. This phenomenon is referred to as jitter.

Because no network can guarantee a perfectly steady stream of packets under real-world conditions, 8x8 uses several patented and unpatented technologies to help combat any normal and expected jitter that is part of a real-world network; it is only when this jitter starts to exceed our recommendations that you experience an issue.

Jitter is usually calculated using packet timestamps instead of RTP timestamps. To calculate jitter, you can use the 8x8 Network Utility, or using your Polycom phone, go to **Menu > Status > Diagnostics > Media Statistics** during an active call in order to see real-time information about your call (or the last call you made if tested in an idle state).

> **Note:** 8x8 recommends that jitter be less than 20 ms, with a latency of no more than 100 ms.

Packet loss can be the result of the jitter buffer being overwhelmed, LAN or Internet issues, or poor wireless signal quality. The latter can be a big problem with Voice over Wi-Fi service. Regardless of the source, 8x8 phones and gateways attempt to conceal this type of signal degradation by patented and unpatented methods. As with jitter, these techniques can maintain voice quality only to a point.

Packet loss on data networks is usually characterized as a burst phenomenon. Networks tend to either sporadically drop single packets (these periods are called gaps in packet loss), or large numbers of packets in a continuous burst. Packet loss concealment techniques typically have no problem handling packet loss during gap periods; it is the sustained bursts you must watch out for. Analytics for 8x8 Work helps to identify these differences.

Note: 8x8 recommends that packet loss be no more than 0.3%.

Bufferbloat is increased latency under load, more often on wireless access channels. This is a measure of the additional time it takes to send data over the Internet when your link to the Internet is loaded with traffic. An established rule of thumb for network equipment manufacturers is to provide buffers large enough to accommodate at least 250 ms of buffering for a stream of traffic passing through a device. Oversizing of these buffers can cause the congestion control algorithms to fail, causing problems as the buffer becomes full of the packets, such as high and variable latency, and choking network bottlenecks for all other flows.

A bloated buffer has an effect only when this buffer is actually used. In other words, oversized buffers have a damaging effect only when the link they buffer becomes a bottleneck. When the current bottleneck on the route from or to another host is not in contention, it is easy to check whether it is bloated or not using the 8x8 Network Utility, or other third-party online tools.

Understand your dial plans

A dial plan defines a pattern of digits that users can dial to make calls inside or outside your business. Users within the business can call each other by using short extension numbers, as defined by their internal dial plan. Users can call external numbers based on an external dial plan that follows well-established practices for a region. For example, if your users are located in North America, their external dial plan is automatically set by the North American Numbering Plan.

Your 8x8 Work service comes with the default dial plan setup based on the country of your site. For example, a site located in the United States is set up with the North American Numbering Plan (NANP), which defines (3-digit area code + 7-digit phone number) when dialing within the country, and (011 + destination country code + phone number) when dialing internationally.

Users within the same business have the convenience of using short extension numbers to dial each other, regardless of where in the world they are. Short extension numbers are defined by the internal dial plan. In addition to the internal dial plan, customers can set external dial plans for the entire site or for an individual user. External dial plans define the dialed digit pattern used in specific regions, specify how to interpret phone number sequences entered by a user, and convert the sequences to normal outbound strings. For example, the North American Numbering Plan (NANP) defines a common dial pattern used by telephone networks within North America.

Using extension numbers, you can click or tap a contact from the contact directory and call your colleagues in the same office, in another city, or in another country.

Features

- Allow communication with users in the same office or another office using extension numbers.
- Allow calls or chats with company contacts across sites and global offices.
- Keep the qualified extension numbers unique across the phone system. The default extension number length is four digits, but can be overridden by the administrator at the site level.
- Give each site a unique site code. The complete extension with a site code is used for reaching users across multiple sites.
- Set sites within a phone system (PBX) with different site code lengths. The default site code is zero digits (or no site code), but can be overridden by the administrator at the site level.

To better understand 8x8 dial plans, let's look at AcmeJets, a fictitious company with employees in multiple locations across USA. This company has set up a separate site for each of their locations: San Francisco is 101, New York office is 102, and Sydney office is 103. With 8x8 dial plans, Sarah (11) who works in the San Francisco AcmeJets office, can call Jeff (12) in the same office , Rob (10211) in New York office, and Jane (10311) in Sydney, Australia using their 8x8 fully-qualified extension numbers.

- **Extension Number**: This is a short digit code used by extension users to communicate with contacts within the same office. The default extension number is four digits but can be overridden by the administrator at the site level. The extension number must be unique within a site.
- **Site Code**: This is a unique identifier code used as a prefix to the extension number to connect colleagues across multiple sites. For example, an extension user in the San Francisco office dials <Site Code + Extension Number> to reach a company contact in the New York office. The default site code is zero digits (no site code) but can be overridden by the administrator at the site level.
- **PBX Dialing Code**: This unique identifier code is applicable only for enterprise-grade customers with offices in more than one country. For example, an extension user in the San Francisco office dials <PBX Dialing Code + Site Code + Extension Number> to reach a company contact in the London office. The default PBX dialing code is zero digits (no PBX dialing code) but can be overridden during initial setup.

> **Note:** Do not assign extension numbers to your phone service that conflict with emergency numbers, or frequently used public numbers in a specific region such as: 911 and 988 in North America, and 112 and 999 in Europe.

> **Note:** If you must define site codes, keep them the same length across all your sites.

Define an internal dial plan

The following deployment sizes give you an idea of which internal dial plan you may need for your business:

If your company phone system has a single site, the dial plan is all set for you. When you log in to 8x8 Admin Console, go to **Home > Company**, click the **PBX** tab, and click to edit the dial plan rule. Notice the following structure in the dial plan for single-site deployments:

- PBX Dialing Code: Not applicable
- Site Code: Not applicable
- Extension Number: By default, an extension is set to four digits. This means all your users are assigned with 4-digit extension numbers, such as 1001 or 1002. While creating a user, if you choose to enter the extension number manually, you are allowed to add only a 4-digit extension. If you wish to have shorter or longer extension numbers, you must modify the digit length under Sites.

If your company phone system has multiple sites, you are required to define a site code for each site. This site code is prefixed to the extension number. The length of the site code is two digits by default, and can be defined under Sites > Internal Dial Plan. For example, if your company has three sites (San Francisco, New York, and Austin), each site can be assigned with a unique site code. The site code is prefixed to the extension number while dialing between sites, in the format of (site code + extension number).

If your company has offices distributed globally, your phone system is set up using multiple PBXs. In this case, each PBX must be identified with a unique PBX Dialing Code. Your company employees can communicate with each other across the globe by using fully qualified extension numbers, in the format of (PBX dialing code + site code + extension number).

Change default dial plan

Depending on the size of your business, you may have one PBX, multiple sites, and many extension numbers.

By default, the PBX dialing code is set to zero, but you can always enable and edit it.

To change the PBX Dialing Code:

1. Go to **Home > Company**, and click the **PBX** tab.

2. Click **Edit** next to the desired PBX.

3. In the PBX details panel, in the **Dialing Code** box, the new PBX dialing code.

4. Click **Save**. .

For businesses with unique extension number (short code), you do not need a site code even if you have multiple sites. We recommend you to select 4 digits for the Extension Length. Users can simply dial the extension number to call users inside or outside their site. For example, if you have two sites (US and Germany), as long as you select unique extensions such as 1001 and 1002 for US office and 1003 and 1004 for Germany office, you do not need a site code.

To edit a the site code or extension length:

1. Go to **Home > Sites**.

2. Click **Edit** next to the desired site.

3. In the **Internal Dial Plan**, change the **Site Code**.

4. Click **Save**.

> **Note:** If you do not have unique extension numbers across your sites, you must define a site code. By enabling site code, users from within the site are able to dial each other using the extension number (short code). From outside the site, however, users are accessible by their qualified extension (site code + extension). If you have only one site, you do not need a site code. Set up the site code under **Sites > Create Site > Internal Dial Plan >Site Code**.

8x8

The extension length is configured by the administrator. You can determine the length of the extension number by entering a choice of one to ten digits from the list. We recommend you to select four digits for the Extension Length.

To edit the site's extension length:

1. Go to **Home > Sites**.

2. Click **Edit** ⟋ next to the desired site.

3. In the Internal Dial Pan, change the **Extension Length**, and save.

To change a specific user's extension number:

1. Go to **Home > Users**.

2. Click **Edit** ⟋ next to the desired user.

3. In the user details, in the left navigation menu, click **Voice basic settings**, and change or edit the **Extension Number**.

4. Click **Save**.

FAQ

Refer to the following frequently-asked questions for more information:

- If you have fewer than 1000 users, leave the default extension number length at four digits.

- If you have thousands of users, increase the extension length to match the size of your organization (with five digits, you can go up to 100,000 users, six digits up to 1 million users, and so on).

- For a large number of sites, with most users using desk phones, set up the site code length to match the number of sites (three digits can serve up to 1,000 sites, four digits up to 10,000 sites, and so on).

- If the majority of your users use the 8x8 Work for Desktop or 8x8 Work for Mobile, do not assign site codes. Your users can just click or tap to call. In this case, site codes do not add value to shorter extension numbers.

For very large global deployments, administrators have the flexibility to add a PBX code that represents a collection of sites within a region or country. Contact 8x8 for additional details.

By default, all users within a site have the external dial plan defined at the site level. However, if you have a remote employee in a different country, you may override the default external dial plan without needing to create a site for just one user.

The length of your site's extension number is determined by your internal dial plan. If you choose four digits for the extension length, the system suggests a four-digit number for the extension number. When you are creating or editing a new user, you can enter any extension length you like, but the system warns you that not respecting the dial plan rule may impact your short dialing.

To change an individual user's extension number, go to **Home > Users**, click ⋮ next to the desired user, and select **Edit**. Change the **Extension Number**, and **Save**.

Site code is configured by the administrator the first time they log in to 8x8 Admin Console. To edit a site code, go to **Home > Sites**, click ⋮ next to the desired site, and select **Edit**. In the Internal Dial Plan, change the **Site Code**, and **Save**.

Get telephone numbers

Stay connected with your contacts around the world using your business phone system. Use your phone lines to communicate with your contacts anywhere in the world. You can get new phone numbers for your business from 8x8, or you can port your existing numbers to 8x8 from another service provider. Transferring or porting your existing numbers helps you with business continuity. While you are waiting for your numbers to be transferred, 8x8 offers temporary numbers for your business. The temporary numbers allow a seamless transition and are not exposed to your customers.

Using 8x8 Admin Console for 8x8 Work you can:

- Claim new phone numbers
- Port your existing phone numbers
- Remove your porting orders
- Resubmit porting orders

Features

- Claim new phone numbers and assign them to your users or services. The number availability depends on the number of DIDs you have allocated to your business, as well as the number inventory of 8x8.
- Choose toll-free, regular phone numbers, or request vanity phone numbers which are easier to remember, such as 1-408-400-CASH.
- Port your existing numbers from another service provider to 8x8 without interrupting your business.
- Initiate porting with required support documents, view porting status, and resolve porting errors.
- Get temporary numbers and begin using 8x8 services without having to wait for the porting process to complete. For inbound calls, ask your service provider to forward your calls to the temporary number. Keep your porting number for caller ID.
- Enjoy the seamless swap of temporary numbers with the ported numbers once the porting is complete.
- Generate a report that lists all phone numbers, assigned or available in your phone system. Find out the list of ported numbers, or numbers that are pending porting, or those that have failed porting by using the relevant filters.

Claim new phone numbers

8x8 allots a pool of phone numbers to your business. You can claim new phone numbers from this pool and assign them to your users or services. The number availability depends on the number of DIDs you have allocated to your business, as well as the number inventory of 8x8. You can choose toll-free or regular phone numbers, or request vanity phone numbers (such as 1-408-400-CASH), which are easier to remember.

Features

- Claim new phone numbers and assign them to your users or services. The number availability depends on the number of DIDs you have allocated to your business, as well as the number inventory of 8x8.
- Choose toll-free, regular phone numbers, or request vanity phone numbers which are easier to remember, such as 1-408-400-CASH.

Claim new phone numbers

To claim new numbers:

1. Go to **Phone Numbers > + Claim Phone Numbers**.
2. Enter the **Country**. The country code is shown next to each country in the list, such as United States (+1). The selected country determines the default language for the porting emails. For example, for a French customer, the emails are sent in French. For multiple orders during one porting process, the same location is assigned to all numbers. When no Country is selected, United States is the default.
3. Enter the **Number Type** such as regular or toll free. A toll-free virtual number is an inbound number that rings to your auto attendant, ring group or primary 8x8 line. US callers can call your toll-free number at no charge to them. You need a license for the toll free numbers.
4. You can **Filter By** number, state or rate center. Rate center is a geographically-specified area used for determining mileage or usage dependent rates in the public switched telephone network.
5. Click **Search** to find the desired numbers.
   For faster results, customize your search by number or location. You can search the numbers that start with, ends with, or contain particular digits or letters. For example, you can filter by numbers in California that contain or end with DIAL, returning +1 209-828-3425 or +1 209-828-DIAL.

6. Select the desired numbers from the result list, then click **Claim Phone Numbers**. The search results are listed in ascending order.

 The claimed numbers are added to your company's phone number inventory, and are reserved for you. You can assign these numbers to users or services, such as auto attendant.

 To check your phone number inventory, go to **Home > Phone Numbers** from the main menu to view the list of claimed numbers. Check the list of phone numbers to see the source of numbers (whether a number is claimed or ported), which numbers are assigned to users, and who the numbers are assigned to.

7. Click **Generate Numbers Report** to download and save the numbers and information such as number type, location, temporary number, and more.
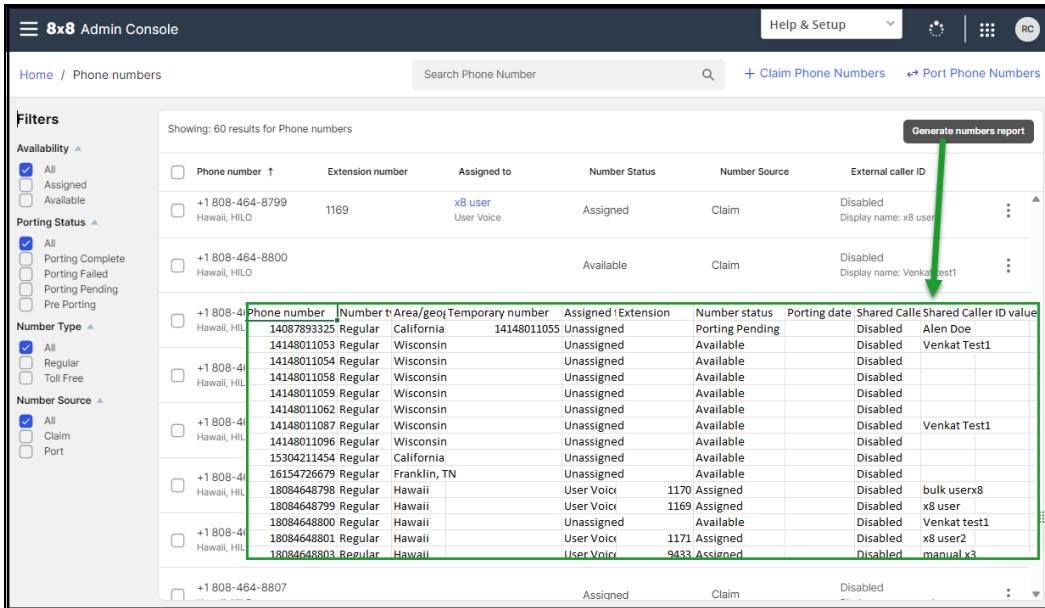
The following table describes the different statuses of phone numbers:

Number Status	Definition
Assigned	Number is assigned to a user or a service such as ring group, and auto attendant.
Available	Number is claimed or successfully ported and available for use. See how to return a claimed number to 8x8.
Failed (porting status and reason)	Porting has failed. Depending on the reason, the administrator can make the necessary corrections and submit again.
Pending (porting status and due date)	Shows the exact time of porting. To manage the specific porting date, contact the Line Number Porting team. See Various Porting Statuses.

Search phone numbers

You can search and filter all phone numbers including: assigned, failed, available, pending, and temporary numbers. Enter the plus sign (+) and the country code, such as +1 408, to filter all numbers starting with that country code. This can specially help filter the international numbers such as +44. To easily locate the UK number +44 121 704 4455, enter **+44** or the country code.

To search users, go to **Home > Phone Numbers** and enter a telephone number. Press Enter on your keyboard to see the results. To remove the search results, clear the search entry and press Enter on your keyboard again.

FAQs

Refer to the following frequently-asked questions for more information:

By entering plus sign and a number in your search box under **Home > Phone Numbers**, you can filter all numbers starting with that specific number. For example, to easily locate the UK number +44 121 704 4455, enter **+44**.

You can see the source of phone numbers in your tenant. To see whether a number is claimed or ported, go to **Home > Phone numbers** and check out the **Number Source** column o see if the number is claimed or ported. {mf--any particular use case?}

Yes; whether you have selected a wrong number or simply have no use for it, you can cancel the claimed number and return it to 8x8. The number will be removed from your number pool and a number license becomes available. You will still be able to recover this number (claim back) within 90 days. To cancel a claimed number, go to **Home**

> Phone Numbers. Find the available number in the list, click ⋮, and select **Return**

number to 8x8.

> **Note:** If you have assigned the number to a user, you must un-assign it first. You cannot return ported numbers to 8x8.

(This is the Drop-down text)

The Shared Caller ID or company's caller ID is the number you choose to be displayed for your external calls. You first need to designate a phone number as your shared caller ID and then select that number as the user's external caller ID:

To create a shared caller ID:

1. Go to **Home > Phone Numbers**.

2. Choose a phone number and select **Use as shared caller ID** from the ⋮ menu .
   This number will be available for selection as the user's external caller ID.

3. Enter a common name, and click **Save**.
   The common name will be used as the caller ID by all users when dialing out with this number, The number appears as **Enabled** under **External Caller ID** showing the common name as the display name. You can choose more than one shared caller ID.

4. While editing a user, go to **External Caller ID**.

5. Select a shared phone number from the list. The **Display Name** is automatically populated.

6. Click **Save**.

Port your phone numbers

Porting is transferring a phone number from one phone service provider to another. Upon initiating a transfer request, 8x8 assigns temporary numbers to your account, allowing you to continue your business without interruption until the porting process is complete. Enjoy the seamless swap of temporary numbers with the ported numbers once the porting is complete.

Features

 Transferring an existing phone number eliminates the inconvenience of changing phone numbers.

- No new phone numbers to remember
- No need to notify friends, family, customers and business contacts of your new phone number
- No need to print new stationery or business cards

- Port your existing numbers from another service provider to 8x8 without interrupting your business.
- Initiate porting with required support documents, view porting status, and resolve porting errors.
- Get temporary numbers and begin using 8x8 services without having to wait for the porting process to complete. For inbound calls, ask your service provider to forward your calls to the temporary number. Keep your porting number for caller ID.
- Enjoy the seamless swap of temporary numbers with the ported numbers once the porting is complete.
- Generate a report that lists all phone numbers, assigned or available in your phone system. Find out the list of ported numbers, or numbers that are pending porting, or those that have failed porting by using the relevant filters.

Get ready to port

Before initiating the porting process, make sure you cancel any special services for your numbers, such as DSL. We strongly recommend you have the following information on hand:

- The billing owner information: first name, last name, company, and address.
- The name of the previous phone service provider, such as AT&T or Comcast.
- A telephone number for billing purposes that remains on the account.
For landlines or fax numbers, you can enter the primary telephone number on the account. For wireless, mobile, and toll-free accounts, enter one of the numbers you are porting.

- The phone numbers you are about to port to 8x8.
- A completed Letter of Authorization (LOA).

> **Note:** We recommend that you consult with your current carrier as to whether a fee applies when you change your preferred carrier.

Port your phone numbers

To port your existing numbers:

1. From the main menu in 8x8 Admin Console, go to **Home > Phone Numbers**.

2. Click **Port Phone Numbers**.

3. After reviewing the **pre-check** requirements, proceed to enter the authorized owner's **Basic Information**. Enter the owner's name, the name of the business, and the billing or service address. Only the account owner or an authorized person can request the transfer.

4. Identify the current **Service Provider** for the numbers to be ported, enter the **Billing Telephone Number**.

5. Enter the **Phone Numbers to Port**. Do not use spaces between the number digits.

   - If you have entered a **Toll free number**, you must provide a copy of a bill (scanned copy or an electronic bill). Note that the phone bill is accepted if it has been more than 30 days from the billing or invoice date on the bill (not the pay-by date). Upload one bill for all toll free numbers.

   - If you have entered a **Wireless Number**, enter your enter your **Account** number and **PIN** in the **Account & PIN** section, for both landline and wireless type phone numbers. This information is only mandatory for wireless and optional for landline phone numbers.
     You can find your account number in the top corner of your bill or invoice. Your PIN is given to you by your former provider and is usually pre-selected. Contact your former provider for any questions. If you like to enter one account number and PIN for all mobile numbers to port, enable **Use the same account number and PIN for all wireless phones**.

6. Enable **Assign temporary numbers**:

- Select System assigned to automatically assign the temporary numbers. The system-assigned temporary numbers are not from your inventory. They are usually offered with the same area code as porting numbers.

- Select a number of your choice from the list of available numbers in your inventory (whether claimed or ported) to manually assign to a porting number.

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> **Note:** For toll-free numbers, you must provide an electronic copy of the bill. Any phone bill that is over 30 days from the billing/invoice date (not the pay date) cannot be accepted.

7. Click **Continue**. A pop-up alerts you about the need to separate the porting request based on the underlying carrier.

   When you submit a request to port a batch of phone numbers belonging to more than one service provider, the porting request will likely be rejected. To prevent porting failures, we detect upfront if the phone numbers belong to different service providers and split them into compatible groups. Further, with your input, we will split the porting request into multiple requests based on the service provider. This allows you to avoid porting rejections as well as track the requests easily.

   Let's say you submit phone numbers belonging to two different providers in the same porting request, you will be alerted that the porting request is not compatible and the phone numbers need to be split into compatible groups. With your permission and input, the phone numbers will then be split into compatible groups and submitted as two separate requests.

8. Check the box to separate numbers into compatible groups and click **Continue**.

9. Select the service provider and enter the billing contact number.

10. Review and accept the terms and conditions in the **Letter of Authorization**. Click **I Agree**.
    You can print the letter of authorization, email the status to others, and see the list of temporary numbers that are assigned to the porting numbers. After submitting the porting request, the status of the transferred number appears as pending in the summary page. See Various Porting Statuses.
    Soon after you submit your request, you receive a confirmation email including the numbers you requested to port. You can assign these numbers to the users while waiting for the porting process to complete. If you choose to send a welcome email to the user, it contains the temporary phone number and a link to set up password. The user can start making and receiving calls using the temporary numbers. To check your phone number inventory, go to **Home > Phone Numbers** from the main menu to view the list of numbers. Check the list of phone numbers to see the source of numbers (whether a number is claimed or ported), which numbers are assigned to users, and who the numbers are assigned to.

We may not be able to submit all your porting requests. For the orders that have not gone through, see the report in **Porting order results**. You can resolve the issue and click to **Restart the porting process**.

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> **Notes:** The current limitation for a porting order is 1000 per order. To port more numbers, create multiple porting orders.

Here are the various porting statuses. You can view and filter Porting Status by going to the Phone Numbers page.

Porting Status	Definition
Pre-Porting	Pre-porting enables administrators to create users via bulk user upload giving them the numbers that are not yet in the inventory. It provides an easy way to capture the porting information with minimum data. The numbers to be ported are put into pre-porting status which means they are automatically assigned a temporary number and the user can start using their service immediately. In the CSV file, include the numbers to be ported and say **Y** in the **User.Voice.PortNumber** column.
Porting Pending	The porting is underway. Email updates are sent for every porting status change, such as porting date confirmed, porting date postponed, porting delayed, etc. The latest confirmed porting date is visible in the Number Status column and under due date.
Porting Complete	The porting is successfully completed. The porting number is then moved to Available or Assigned once the temporary number is swapped out.
Porting Failed	The porting failed. The porting fails for various reasons. In many cases porting failure is recoverable, such as an incorrect billing telephone number. You can review your answers and re-submit the porting request.

Let's say your porting request has failed and you realized you have entered an incorrect number to port. You can easily remove your porting request for the number that has failed or is in pending porting state. When you remove the porting request, the number is

removed from your system. The temporary numbers are either returned to 8x8, Inc.or remain in your inventory as a claimed number.

To remove a failed porting order:

1. Go to **Home > Phone numbers**.

2. Filter the numbers by **Porting Failed** status.

3. Find the number you wish to remove and click ⋮ .

4. Select **Remove porting request** from the menu. The failed porting number will be removed from your system following a confirmation message. The temporary numbers can be kept in your inventory as claimed numbers.

> **Note**: To help with larger deployments, you can select multiple porting requests in pre-porting and porting failed status and remove them all at once.

If you are not happy with any number you have submitted, or if you need to change your order, you can simply make changes to your order and resubmit without going through

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the complete porting process.

To resubmit a request, you must:

- Be in a portable state such as pre-porting or failed stage.

- Keep at least one telephone number unchanged in an order with multiple porting numbers, or the order will be canceled.

- Enter the same type of numbers as the original order (for toll-free and wireless orders only).

- Do not change the service provider.

To resubmit a porting order:

1. Go to **Home > Phone numbers**.

2. Filter the numbers by **Porting Failed**.

3. Find the order you would like to change and click ⁞.

4. Select **Resubmit porting request**. Edit the order numbers and click **Continue**. See [Port your existing phone numbers](#).
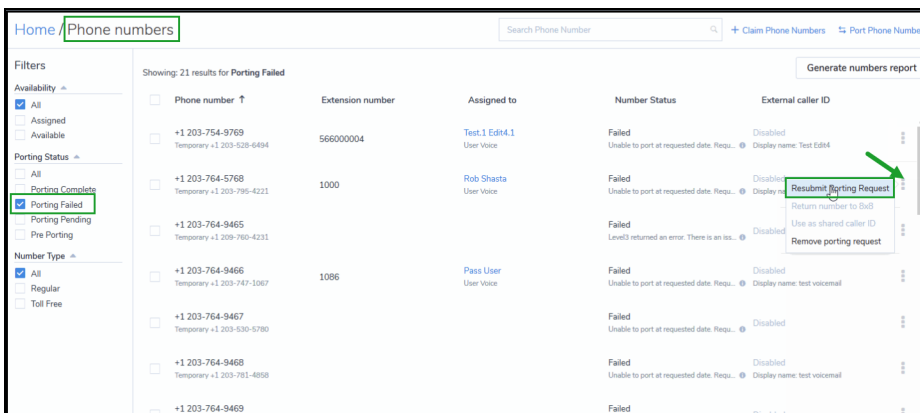
FAQs

Refer to the following frequently-asked questions for more information:

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Porting is transferring a phone number from one phone service provider to another. The porting request is submitted by the administrator via 8x8 Admin Console. A few steps are involved in the porting process:

- Gather the authorized person's information.
- Find out the correct Billing Telephone Number (BTN).
- List all the telephone numbers you are porting, and provide the required documents (if needed).
- Sign the Letter of Authorization (LOA). Depending on the type of the number you are porting and its area, we may need additional documents. Our Number Porting team will contact you directly if needed. See Port Your Existing Phone Numbers.

Transferring an existing phone number eliminates the inconvenience of changing phone numbers.

- No new phone numbers to remember
- No need to notify friends, family, customers and business contacts of your new phone number
- No need to print new stationery or business cards

Yes; upon submitting a number transfer request, 8x8 automatically releases temporary numbers to your account. Temporary numbers are of the same country and type (regular or toll free) as the number to be ported. You can communicate these temporary numbers to your former phone service provider and ask them to forward your incoming calls to the temporary numbers. This prevents any disruption of inbound calls during the porting process. Once the porting is complete, the temporary numbers are automatically swapped with your real numbers.

No; the temporary numbers do not need a license as long as they are paired with a number to be ported. When you cancel a porting request, the number to be ported is removed from the system. The temporary number become a claimed number and uses a

license.

You do not need to. The temporary numbers are for the transition only, and in order to make the transition process seamless, you do not need to expose them to your customers. For the inbound calls, if you asked your service provider to forward the calls to your temporary number, you can assign services to the porting numbers and your customers can continue to dial the old telephone numbers. The calls are then routed to your temporary numbers. You can answer your calls using your 8x8 system.

Do not cancel your old telephone service until your numbers have been completely transferred.

When the porting is complete, 8x8 automatically removes the temporary numbers and swaps them with the ported numbers. The temporary numbers are released back to 8x8.

Number status is shown in the **Home > Phone Numbers** list page. The porting process is not complete as long as you see the temporary numbers showing under your **Phone Numbers**. .

Updates on the status of your porting request are sent via email, and are visible in 8x8 Admin Console under **Home > Phone Numbers**.

You can see the source of phone numbers in your tenant. To see whether a number is claimed or ported, go to **Home > Phone numbers** and check out the **Number Source** column. {mf--any particular use case?}

If you have started a porting process and it fails, as long as you have a temporary number, you can assign the number to a user or workgroup. In fact, during porting, your temporary number is assigned not the porting number. You can try to port the failed number again until it successfully goes through.

Yes; as long as it has a temporary number associated with it, you can assign the porting number (which is failed) to the user and save. The numbers shown for the users are the porting numbers not the temporary numbers. Restart the porting process.

If you are not happy with any number you have submitted, or if you need to change your order, you can simply make changes to your order and resubmit without going through the complete porting process. Restarting the porting process for a failed number, gives you the possibility to correct any erroneous information. To resubmit a porting request, go to **Home > Phone numbers**. Filter the numbers by **Porting Failed** or **Porting Pending**, and click ⋮ next to a number. Select **Resubmit porting request**. Edit the order number and click **Continue**.

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You can remove a porting request for a failed or pending porting numbers. This capability allows users to remove a failed order due to a mistake or incorrect number. When you remove the porting request, the number will be removed from your system and the temporary numbers will either return to 8x8, Inc.or remain it in your inventory as a claimed number. To remove a porting request, go to **Home > Phone Numbers**. Find the available number in the list, click ⋮ , and select **Remove porting request** from the menu. See how to Remove a Porting Request for more information.

Transferring a number is free of charge, as long as you have purchased a license from 8x8 for the number you want to transfer.

Having all the required information ready makes the process quick and painless. In most cases, we can transfer your number within 10 business days from when you submit the number transfer request, provided that all the correct information and documentation is submitted, including a correctly filled out Letter of Authorization (LOA) and the correct Billing Telephone Number (BTN). In some cases, however, number transfers can take up to 4 weeks depending on when your current provider releases your number(s).

Yes, but you are responsible for any early termination fees charged by your current service provider for exiting the contract, plus any balance owed on your account.

Yes; as opposed to traditional telephone service providers, our services are mobile. With all our accounts, you can keep your phone numbers from another city regardless of where you are located; a great advantage of the 8x8 VoIP phone service.

Yes; all domestic US-based toll free numbers are transferable to 8x8, unless there is a

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contract that prevents you from doing so.

It is possible you may experience a lapse in service during the actual transferring process. This normally lasts only a few minutes. We will do everything we can to make sure that if downtime does occur, it is brief.

No; you cannot transfer a number that has DSL associated with it. You must contact your current provider to remove the DSL service from the line you want to transfer, and request a new number for the DSL service before starting the number transfer process. Otherwise, you can sign up for another type of high-speed broadband service (such as cable) before you transfer the number to 8x8.

In most cases, your provider automatically disconnects your account when the number transfers. However, we encourage you to contact your provider to ensure they have disconnected the service and stopped the billing to your account.

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Set up sites

A site in 8x8 Work represents the location of your business. Your 8x8 Work service comes with sites already created for you, based on the information you have provided at the time of purchasing the service. As your business grows, you can create additional sites. Sites in 8x8 Work simplify administration for all endpoints within a site by applying common properties, such as emergency address, language, dial plan and time zone. Moreover, administrators can manage advanced call handling options such as receptionist dialing for the site.

Features

- Assign common address, language, and time zone to all users belonging to a site.
- Define a unique site code only when your business needs to reuse extension numbers across sites.
  - Users within a site call each other using short dialing. (Robin dials Sam using the extension number 1010)
  - Users across sites can dial each other using short dialing if the extension numbers are unique across sites.
  - Users across sites with identical extension numbers dial each other using site code + extension number. Let's say we have a business with three sites each with site code 100, 200, and 300 respectively. If a user from site 1 needs to talk to the site 1 receptionist, they simply dial 1001. If they need to talk to the receptionist of site 2 or site 3, they must dial the site code followed by the extension number 2001001.
- Identify a receptionist extension for each site. Having a site receptionist allows users to reach the receptionist when callers reach the voicemail of a user, call queue, ring group, or auto attendant within the site. They can dial **0** followed by **#** to be directed to the site receptionist.
- Define a main line number for the site which serves as the primary number to direct your site call traffic.
- Set the main line number as the caller ID for all users belonging to the site.
- Select the calling country based on the call traffic of the user. If a user handles most calls from Australia, select Australian numbering plan.
- In a single PBX phone system that is VCC enabled, all sites created are VCC enabled by default.
- In a multi-PBX phone system with 8x8 Contact Center, site association to the PBX should be based on whether the site will include VCC users or not.

Create new sites

You can set up and manage sites from within 8x8 Work 8x8 Admin Console.

To create new sites:

1. Go to **Sites > + Create Site**.

2. Enter a **Site Name**.

3. If available, select a **PBX**. The PBX field appears only if you have a multi-PBX phone system. A PBX can be VCC enabled or not. For details, see VCC-enabled PBXs below:

   - **Single-PBX Phone System**: If your phone system has a single PBX and it is linked to a VCC tenant, then the PBX is VCC enabled. When you create a site within the VCC-enabled PBX, the site is automatically VCC enabled. When you create a VCC user, assign the user to the VCC-enabled (Contact Center) site. All VCC users must be assigned to a VCC-enabled site.

   - **Multi-PBX Phone System**: In a multi-PBX environment, creating sites and users must be planned ahead. In the **Company** page, you can view the VCC tenant name and the PBX name it is linked to. When you create a site which includes VCC users, you must ensure the site belongs to the VCC-enabled (Contact Center) PBX. While creating a VCC user, you must assign the user to a VCC-enabled site only. If you select a non VCC-enabled site, you will be disabled from assigning VCC services.

4. In Internal Dial Plan, enter a **Site Code** and an **Extension Length**. All sites belonging to a VCC-enabled PBX are VCC enabled by default. This ensures all VCC users are on the right site and the right PBX. By enabling site dialing, users from within the site are able to dial each other without specifying the site code (short dialing), but from outside the site they are only accessible by their qualified extension, site code + extension. For example: if the site code 101 has two extensions 10110 and 10111, users are able to dial each other by dialing just 10 and 11. You can enter up to ten digits for the combination of site code and extension length. For details, please refer to Understand Your Dial Plans.

   > **Note:** Even with a defined site code, you can enter any extension length you like when creating a new user. If you do not follow the site code and the recommended length, the system warns you. However, you can save the user and function as long as the number is unique across all phone systems (PBXs). For example, if the system suggests 10100 for extension number and you change it to 101, a warning appears that "...not respecting the site dial plan may impact short dialing".

5. Enter your site's **Address**, or click to create a **New address**.
   A valid verifiable address is required for a site to meet the needs of emergency service providers. By default, the emergency address for all users within the site is set to the address of the site. If you have remote workers, you can override the emergency addresses on the user level as needed.

6. Specify the email address(es) to be notified when 911 is dialed from a number associated with this Site. It is a best practice to notify at least one user at the same location where the call is made

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7. Select a **Language**.

   The language set at the PBX level is the default language until you select a new language for your site. The site language settings specify the default language of the system audio prompts, and the display language on the desk phones. By default, the language for all users within the site is set to the language specified at the site level. If you have a user who requires a different language, you are able to override the language at the user level.

8. Select a **Time Zone**.

   The time zone set at the PBX level is the default time zone, until you select a new time zone at the site level. If you have users in other time zones, you can set the time zone on the user level.

9. Enter a **Default voicemail 0 out destination**. You can search by user, service name, extension, or phone number. Having a site receptionist allows users to reach the receptionist when they reach the voicemail of a user, call queue, ring group, or auto attendant. When reaching the voicemail box, callers can leave a voicemail, or dial **0** followed by **#** to be directed to the site receptionist. See Enable Switchboard Pro to learn how you can add a site receptionist as a switchboard operator.

10. Select the **Main Line Number**.

    Main Line Number serves you as your site's main telephone number, and can be assigned to any user or service. You can select any available number from the claimed or ported numbers as your main line number. If you are in the process of porting a number to 8x8, you must wait until the porting is complete successfully to use it as your main line number.

11. Enable **Set Main Number as Caller ID** for all users belonging to this site.

12. Enable **Share Main Number as Caller ID** with all users belonging to this site.

13. Select the **Calling Country**.

    This field determines the default calling country for the user created within a site, but can be overridden by the administrator at the user level. Calling country is usually determined by the country the user calls the most. For example, if a user in US makes most of his calls to Germany, the calling country should be defined as Germany Numbering Plan.

Change users sites

You can change a user's site via bulk edit as long as the new site is located within the same phone system or PBX. When you change the users sites, the system does not allow you to change other values in the same bulk edit session. Save the new site before you can change other fields such as time zone or department.

With every site change, the following components may change:

Component	Change	Example
Extension	Changes if the site dialing (site code) is enabled.	For example, if the new site code is 7, the user's extension is automatically prefixed with 7. If the user moves again to a site prefixed with 8, the site code changes to 8.
Language	Changes to the new site's language only when the previous user's language is the same as the site's language.	For example, if the user's language and the site's language are both French, when the site changes to German, the user's language also becomes German. However, when a user's language is French and the site's language is English, if the user moves to a new site with German language, the user's language will still remain English.
Time Zone	Changes to the new site's time zone if the previous user's time zone is the same as the old site's time zone.	For example, if the user's time zone and the site's time zone are both US Pacific, when the site changes to UK time zone, the user's time zone also changes to UK time zone. However, when a site's time zone is US Pacific and the user's is UK, if the user moves to Australia, the user's time zone will remain US Pacific.
ANI	Changes to the new site's Main Line number if the new site uses mainline number as external caller ID.	
E911	Changed to the new site's address if the previous user's address is the same as the old site's address.	For example, if both user's and site's addresses are San Jose, when the site changes to San Francisco, the user's address also changes to San Francisco. If you register an invalid email address for emergencies - the email addresses having no dot (.) in the domain part and email addresses with a suffix apostrophe (') - do not passed the validation.
Receptionist	No Changes to the new site's receptionist.	
Dial Plan	No Changes to the new site's dial plan.	

> **Note:** The site change is only possible through Bulk Edit. To change the site of a single user, go to **Home > Users**, select the user you want to update his/her site and click Bulk Edit, then change the user's site.

> 📝 **Note:** If you have to move a user across phone systems, you must delete the user then create the user again in a site that belongs to the new phone system.

To change a user's site:

1. Go to the **Users** page and select the users you would like to change.

2. Click **Bulk Edit**.

3. Select **Site** and click to choose one from the list.

4. Click **Continue**.

5. Review the report to see whether all selected users have moved to the new site then click **Confirm Bulk Edits**. A task will be created. You can monitor its progress in the Tasks area.

FAQ

Refer to the following frequently-asked questions for more information:

No; there is no limit for the number of sites you can create.

- To edit a site, go to **Home > Sites** and click ✏️ next to the desired site.

- To delete a site, go to **Home > Sites** and click 🗑️ next to the desired site.

If you have more than one site but do not have unique extension numbers across your sites, you must define a site code. By enabling site code, users from within the site are able to dial each other using the extension number (short code). From outside the site, however, users are accessible by their qualified extension (site code + extension number). If you have only one site, you do not need a site code. Set up the site code under **Sites > Create Site > Internal Dial Plan >Site Code**. For details, please refer to

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[Understand Your Dial Plans](#).

The default site code length is two digits; however, you can change the digit length based on your needs. A site code must have the same digit length within one country or phone system.

Main Line number serves you as your site's main number, and can be set as the Caller ID for all users who belong to that site. You can select any available number from the claimed or successfully ported numbers as your main line number. If you are in the process of porting a number to 8x8, it cannot be used as Main Line number until the porting is complete.

Internal dial plans allows employees to communicate with one another using extension-to-extension dialing, whether the employees are in the same location or in different locations.

External dial plans, however, take numbers dialed by users (in the format of IVR callback, Web Callback, click-to-dial, workplace phone, etc.), and apply editing rules to create a valid global public phone number known as E.164.

Set up emergency addresses for sites

When creating or editing a site, you have to configure an address emergency, which will be displayed to an emergency service operator when an emergency call is made by this user.

Add a site emergency address

> **Important!** Emergency address and the user's primary phone number must be located in the same country. Otherwise, you cannot use that address as an emergency address.

To add a site emergency address:

1. In the 8x8 Admin Console **Home** page, under **Phone System**, click **Sites**.

2. While creating or editing an existing site, when configuring the site address, under **Details**, you can choose to use an existing address or to enter a new address:

A. If you select an existing address from the list

○   Select the site address you want to add from the list under **Address**.

Note: You can enter the address in the **Select...** box to narrow the searching.

B. If you add a new address:

- Click **Add new address**.
- In the **Add new address** window, select the country where the site is located.
- Select the address you want to add from the list below, and click **Validate**.

- If you don't find the address in the list, select **Enter address manually** toggle On and enter the site address manually.
- Click **Validate**.

- If the new address is not recognized as being valid, you can choose an address that is closest to your current location or , you can use the address as entered.

- Once the address is confirmed as validate and eligible for the Emergency Services, click **Save**.

Add new address

Country *

United Kingdom

Enter address manually

Street number *   Street name *

114   Whitechapel High Street

Address line 2

Add locality

City / Town *

London

State / Territory   Postcode *

London   E1 7PT

This does not appear to be a valid address.

Your address could not be found. Please choose an alternative option

We have identified the following validated address. Please choose the address that is closest to your current location

Use existing: 114 Whitechapel High Street, London, E1 7PT

Use the address as entered

I acknowledge that this address may not be eligible for Emergency Services. In the event of an emergency, I acknowledge that an Emergency Services operator may not have access to a user's location information.

Cancel   Select

> **Notes**:
> - In the US only, a third-party entity (Emergency Validation provider) checks the address from the emergency registration perspective.
> - You can override an existing address, but it might not be registered for Emergency Services if it's not validated.

3. Under **E911 Notification Emails**, add the email address(es) to be notified when 911 is dialed from a number associated with this Site. It is a best practice to notify at least one user at the same location where the call is made.

4. Click to save the site.

SMS Registration - brand and campaign registration

SMS registration allows customers to manage both their registration brand and campaign processes and the SMS assignment, which is necesary to ensure that customers' SMS are not blocked by the SMS traffic operators.

The SMS registration process contains three sections:

- **Brand** - Manage campaigns registration, by providing basic information about your brand.
- **Campaign** - Define your campaign.
- **SMS enabled phone numbers** - View and disable enabled SMS numbers. (Assign or enable a user to SMS through the Users page).

The SMS registration configuration tab is an online web form through which you self-register the SMS traffic to comply with what carriers expect in terms of SMS traffic. Moreover, you can manage the SMS numbers assignment process.

To SMS register your brand and campaign and assign SMS numbers:

1. In the Admin Console **Home** page, under **Phone System**, click **SMS**.
2. In the **SMS** page, register your company and assign phone numbers for SMS traffic.
3. Under **Your Brand**, provide all the basic information about your brand and click **Save**.

   A call is sent by the app to the Campaign Registry (a third-party entity), and the registration happens asynchronously. The validation might take about one minute.

4. Under **Campaign**, define your campaigns as you need.

5. Under **Your SMS enabled phone numbers**, from the list the user you want to disable from sending SMS, and

   click **Remove** 🗑 number in the related row. Confirm.

> **Notes**:
> - We only enable SMS numbers only for the US or Canada.
> - A user might have assigned more than one number, and if more than one is SMS capable, you can enable only one at a time.
> - First number is the enabled SMS number.

To assign or enable a user to SMS, navigate to **Home** > **Users** page.

Review profile policy

The 8x8 Profile Policy service offers the ability to restrict users from using certain capabilities of Virtual Office. Whether it is accessing Virtual Office Meetings, or upgrading to recent version of 8x8 Work for Desktop, or accessing and deleting call recordings, you can disable these features company wide by using a master profile policy. Companies with existing solutions for meetings may want to disable access to Virtual Office Meetings. The master user policy allows you to disable meetings. As an IT admin you may need to ensure that every single software installed on user's machines is approved and validated by the IT department. So, you may want to prevent users from automatically updating their software until validated. By disabling the update prompt for 8x8 Work for Desktop, you can facilitate this validation.

Features

- Restrict users from using Virtual Office Meetings.
- Prevent users from upgrading the 8x8 Work for Desktop.
- Prevent users from using messaging in 8x8 Work for Desktop and 8x8 Work for Mobile.
- Prevent users from accessing and deleting call recordings.
- Edit these restrictions as desired via a master profile policy.
- Apply the policy per user while creating a user.

Edit the master profile policy

1. Go to **Profile policies** from the main menu.

2. You will see the master user policy. Click ✎ to edit the **8x8 Master User template** policy.

3. Edit the policy name as desired.

4. Click to turn on the following settings in the profile policy. If enabled, users cannot modify their account settings or preferences in the 8x8 Work for Desktop or 8x8 Work for Mobile.
   - **General**: If enabled, it prevents users from accessing virtual meetings, receiving upgrade prompts for 8x8 Work for Desktop, using messaging functionality, or having access or deleting call recordings.
   - **Basic information**: If enabled, it prevents users from modifying their basic information in 8x8 Admin Console.

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- **Voicemail settings**: If enabled, it prevents users from modifying their voicemail settings in 8x8 Admin Console.
- **External caller ID**: If enabled, it prevents users from modifying their external caller ID in 8x8 Admin Console.
- **Internal caller ID**: If enabled, it prevents users from modifying their internal caller ID in 8x8 Admin Console.
- **Call forwarding rules**: If enabled, it prevents users from modifying their call forwarding rules in 8x8 Admin Console.
- **Music on hold**: If enabled, it prevents users from modifying their music on hold in 8x8 Admin Console.
- **Call recording settings**: If enabled, it prevents users from modifying their call recording settings in 8x8 Admin Console.
- **Emergency address**:If enabled, it prevents users from modifying their emergency address in 8x8 Admin Console.
- **Fax settings**: If enabled, it prevents users from modifying their fax settings in 8x8 Admin Console.

5. Click **Save**.

> **Note**: By default, the above settings are available to the 8x8 Work users. The 8x8 Admin Console administrator can limit the access by turning on the settings in 8x8 Admin Console.

> **Note:** The chat messaging only applies to VOD version 6.1 and newer, or VOM version 7.7 and newer.

Create a new profile policy

You can create multiple profile policies in a company or select a profile policy as the default policy. If no profile policy is selected when creating a user, the default policy will be assigned to the user.

To create a new profile policy:

1. Go to **Home > Profile Policies**.
2. Click **+ Create new profile policy**.
3. Define the profile policy settings as desired.
4. Click **Save**.

To mark a profile policy as default:

1. Go to **Home > Profile Policies**.

2. Find the profile policy from the list and select **Make default** from the ⋮ menu.

Change profile policies in bulk

You can change multiple profile policies in bulk. The bulk user assignment is also accessible through bulk CSV update.

To change profile policies in bulk:

1. Go to the **Users** page and select the users you would like to update.

2. Click **Bulk Edit**.

3. Go to **Services and permissions**.

4. Check **Assign a profile policy**.

5. Select a profile policy from the list, and click **Continue**.

6. Review the report to see whether all selected users with the new profile policy have been correctly updated. Click **Confirm Bulk Edits**. A task will be created and you can monitor its progress in the tasks area.

Delete profile policies

To delete a profile policy, go to **Home > Profile Policies**, select a profile policy from the list and select **Delete** from the ⋮ menu.

> **Note:** You cannot delete a profile policy if users are assigned to it. To delete a profile policy, you must remove the users first.

Review licenses

The license type you assign to a user determines the scope of available phone features such as basic calling to advance collaborative capabilities. Depending on your subscription, you can have 8x8 Work Licenses, such as basic, limited, and unlimited license, or VCC Licenses, such as a VCC agent with Expert Connect or X series.

Log in to 8x8 Admin Console and navigate to **Home > Licenses** to view the list of available licenses for your account, their description, and quantity. You can also see how many of the licenses are assigned to users.

We have organized the license list in three-level structure for easier consumption. Licenses are grouped by:

- License type
- License country
- Detailed side panel

The details side panel displays:

- License IDs
- Who or what each license is assigned to
- The service address associated with each license

Additionally, we allow:

- Filtering by country
- Searching by license ID
- Filtering by license status (assigned/unassigned/suspended)
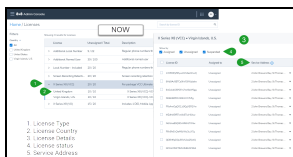
8x8 Work licenses

To our 8x8 Work users, we support two categories of licenses:

the following 8x8 Work licenses:

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- **8x8 Work X Series**: Includes X2 to X8 lincense types with access to varying product functionality. For latest info, check out https://www.8x8.com/x-series
- **8x8 Work Lobby**: Includes basic extension-to-extension calling and analytics capabilities.
- **Virtual Office Basic**: Includes metered calling, softphone and analytics capabilities.
- **Virtual Office Editions**: Includes unlimited calling, softphone, fax, SMS, meetings, analytics, integration capabilities, and more.

8x8 Contact Center licenses

For our 8x8 Contact Center users, we offer the following 8x8 Contact Center licenses:

- **VCC Agent**: 8x8 Contact Center Edition Users use this license to assign VCC agent privileges.

  For Expert Connect services which allows your VCC agent to collaborate with experts in the team via 8x8 Unified Communication applications such as 8x8 Work for Desktop or 8x8 Work for Mobile, you must add an appropriate Virtual Office Editions service bundle f

- **For X Series users**: Select an appropriate X series bundle which supports VCC services.

To quickly view a user license information, go to **Home > Users** and click on any user in the list. The Info Panel displays the information related to that user including the user's services and permissions

To have a general view of the list of licenses, their unassigned /total quantity, and descriptions:

1. Go to **Home > Licenses**. For the latest available licenses and services at 8x8, Inc., visit https://support.8x8.com.

2. Expand the license type whose details you want to review, and click the desired license.

3. In the license panel that opens, review how many of those licenses have been assigned to which user.

4. Optionally, you can filter the licenses by assigned, unassigned or suspended.

The suspended licenses in your system are not usable and cannot be assigned to users.
A license may be placed in suspended status:

- If the license was removed from your system by the 8x8 team with the intent of reducing the billable license number. Upon removal, the license will remain in a suspended state for 30 days before being actually removed from the inventory, during which you may reinstate the license.
- If the license is associated with a user who is deactivated, then the license will be moved to a suspended state. Reactivating the user revokes the suspended state of the license.

A user without a license is just a contact. The contact cannot function as a user until a service or license is assigned to them.

To assign licenses to users:

1. Go to **Home > Users** and click to edit an existing user account or create a new user.
2. Open **Services and permissions**.
3. Select and **Assign a policy profile**. The 8x8 Master User Template is selected by default.
   With the 8x8 Profile Policy you are able to restrict users from using certain capabilities of Virtual Office, such as accessing Virtual Office Meetings, upgrading to recent version of Virtual Office Desktop app, or accessing and deleting call recordings. You can disable these features company wide by using a master profile policy. To modify the 8x8 Master User Template, go to **Home > User policies** and click to edit the options. See Review Profile Policy.
4. Click to **Assign one or more services to user** from the list.
5. Click **Save**.

You can choose any license from the license drop-down, whether upgrade or downgrade. When you downgrade a license, the user's phone number, extension number, call forwarding rules, and other shared settings between licenses are preserved. The system automatically changes the features that are not shared between the licenses such as Switchboard Pro or Analytics for 8x8 Work. For example, when you downgrade a user license,Analytics for 8x8 Work automatically changes from

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Supervisor to Essentials. When you upgrade a license, however, you still need to configure the user profile to allow the new feature capabilities. In the above example, you need to modify the user profile to allow the supervisor capabilities instead of regular user for Analytics for 8x8 Work.

To upgrade or downgrade the user license:

1. Go to **Home > Users**, and click **Services and permissions** while editing a user.

2. Select a different license from the drop-down list.

3. If you already have a license and would like to add a second 8x8 Work, or a 8x8 Contact Center, click + next to the first license.

4. Select and add a new license from the list.

5. Save the user.

To remove a user license:

1. Go to **Home > Users** and click **Services and permissions** while editing a user.

2. Click **X** next to the license. You receive a message that removing a service can affect the user capabilities.

3. Click **Continue**.

4. Save the user.

FAQ

Refer to the following frequently-asked questions for more information:

Each license is associated with a service address based on the sales order location. Let's say your company orders licenses in bulk from the headquarters (NewYork) location, but then distributes it to your branch offices in Seattle, Delaware, and Washington. The service address of the assigned licenses get updated while the unassigned licenses remain bound to New York. With the varying state taxes in the US,

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the amount billed for unassigned licenses may not be accurate. To resolve this issue, you have the ability to manually update service addresses for unassigned licenses as well.

To manually updated the service address of unassigned licenses:

1. Go to **Licenses**.

2. Select a license type and expand the countries the license is available to.

3. Select a country to view the license details panel.

4. Unselect the filters **Assigned** and **Suspended** to view just the unassigned licenses.

> **Note**: By default, you can view licenses that are assigned, unassigned, and suspended.

5. From this list, in the service address column, select the site address to associate the license to.

6. To update the service address for multiple licenses, simply select the desired licenses and choose a service address from the available service address options.

7. Notice the unsaved changes link at the top of the list. Click to view a summary of the address changes including the previous address and the newly opted address for each license.

8. Click **Save** to save all the address changes.

These service address changes will reflect immediately in the licenses list in 8x8 Admin Console, while it takes around 15 minutes to cascade to the 8x8 Billing portal.

Suspended licenses are not usable and cannot be assigned to users. A license may be placed in suspended status:

- If the license was removed from your system by the 8x8 team with the intent of reducing the billable license number. Upon removal, the license will remain in a suspended state for 30 days before being actually removed from the inventory, during which you may reinstate the license.
- If the license is associated with a user who is deactivated, then the license will be moved to a suspended state. Reactivating the user revokes the suspended state of the license.

Users can use from a variety of desk phones and softphones:

- With Virtual Office Editions or Virtual Office Classic and 8x8 Contact Center licenses, you can use 8x8 Work for Desktop softphone or any desk phone supported by 8x8, Inc., such as Polycom.
- With 8x8 Contact Center license and dedicated extensions you must use a locked-down 8x8 Contact Center desk phone. Users do not need a Virtual Office Editions or Virtual Office Classic license for dedicated extension. Only 8x8 Contact Center services are assigned to these users.
- The 8x8 Contact Center users can also use a compatible third-party softphone or desk phone (such as Bria or any landline or mobile number for users working from home). See the third-party phones and 8x8 services for more information.

No. In order to view all the transaction information associated with a call, you need a locked-down desk phone for 8x8 Contact Center dedicated extension. All phone functions such as putting calls on hold or transferring the calls, must be performed on the dedicated locked-down phone.

Add 8x8 Work users

After you claim phone numbers for your business, you are ready to create contacts, identify users, and assign them phone services and devices to enable communication. Users can be assigned with 8x8 Work services or 8x8 Contact Center services. You can also create administrators and give them privileges to manage the phone system configuration, or create external contacts with personal phone numbers.

With 8x8 8x8 Work, you can create:

- **Contacts**: A contact is a user without 8x8 services (licenses) and permissions. To create a contact, enter the basic information such as first name, last name, email, username, and site. The contact is created and added to the users list but cannot function as a user as no services or licenses are assigned to them yet.
- **Users**: A user is any Virtual Office contact assigned with 8x8 services (licenses) and permissions. If you would like your contact to communicate via phone, you need to promote it to a user by assigning a service, a telephone number, and an extension number.

When you create a new user with VO or VCC services, the user receives a welcome email containing their login credentials. Users can log in to the 8x8 Work desktop or mobile apps with these credentials, and get connected with the rest of the world.

Features

- **User creation**: Ability to create a user, assign a service, and configure the services enabled by the license all from VO-8x8 Admin Console.
- **Phone number assignment**: Ability to assign any available DID and extension number to the user.The extension number must be unique within your system.
- **Sites advantages**: Users must belong to a site. The default emergency address, language, and time zone are derived from the user site. Users within a site can call each other using short dialing.
- **Customizable username**: The username follows the format of <CompanyName.FirstName.LastName> by default, but can be changed to a unique username of your choice. The company name appears on the **Company** page.
- **Password Reset**: Resetting the user password sends an email to the user to change the password associated with their account.
- **Access to client apps**: By default, each user assigned with VO services gets access to VO client apps - Virtual Office desktop app and Virtual Office mobile app. You can optionally assign a hardware endpoint to users. To see the supported devices by 8x8, Inc., see 8x8 supported VoIP and IP phones.

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- **Device activation**: You can generate a device activation code and send it to the user in a welcome email. If you have a MAC address, enter the address for the device and activate it remotely. The MAC address activation is ideal for users without an email address, such as lobby or computer lab phones.

- **User deactivation**: Deactivating a user temporarily suspends the account without the loss of any settings. The user cannot log in and make or receive calls, but can make emergency calls as long as the user is assigned a phone device.

- **User reset**: Resetting a user account to the default settings clears the voicemail greeting, removes existing voicemail messages, resets the voicemail password, and removes any call forwarding rules. This allows you to reuse the login for a different user.

- **User deletion**: Deleting a user allows you to completely recycle and reuse their license, phone number, device, and extension. The voicemail forwarding rules are also deleted. The deleted user cannot log in to 8x8 applications. The hardware endpoint associated with the user gets deactivated. All user content such as voicemail, call recordings, messages, and fax are deleted.

- **Blocked SMS** - Blocking inbound SMS from phone numbers or shortcodes, at company and user level. To see how to access the list of blocked SMS numbers as an end-user, click here.

- **SMS enabled numbers** - Enabling or disabling SMS functionality. This allows you to see if the user's number is assigned to the campaign.

- **8x8 Meet setup**: 8x8 Meet enables your users to collaborate in a powerful meeting experience, and 8x8 Spaces allows users to be brought into your office's conference rooms virtually.

You can search and filter users for easy and quick locating. The results will be saved even if you navigate away from the search screen. Let's say you searched users with first name 'John', the resulted list will be saved until you clear the search entry.

To search users, go to **Home > Users** and enter a search entry. Press Enter on your keyboard to see the results. To remove the search results, clear the search entry and press Enter again.

You can generate a users report including name, address, calling ID name, license, device model, site, and more. With a user report, you can quickly find users information, audit, or verify them. You can decide what information to show on your report by selecting or clearing the check boxes for basic and advanced fields. For a quick find,

enter the fields you are looking for in the search box.

To generate a users report:

1. Go to **Home > Users**.

2. Click **Generate users report**.

3. Select the desired columns on the list, and click **Generate**. A CSV format report is generated.

4. Click **Download** and open the report.

5. Review and make changes and click **Save**.

FAQ

Refer to the following frequently-asked questions for more information:

From **Home > Users**, enter a user's name in the search box, and press the **Enter** key on your keyboard. The user appears in the results. To see a summary of the user information, click the user's row.

It clears the voicemail greeting, removes the existing voicemail messages, resets the voicemail password, and removes any call forwarding rules. To reset to default settings, from **Home > Users**, click ⋮ next to the desired user, and select **Reset to Default Settings**.

From **Home > Users**, click ⋮ next to the desired user, and select **Reset User Password**. The user receives an email to change their user account password.

This option is only available to the users with services assigned. From **Home > Users**, click ⋮ next to the desired user, and select **Send Welcome Email**. The user receives a welcome email containing their login information. If you want your users to use 8x8 Work for Desktop or 8x8 Work for Mobile, the user has to configure their 8x8 Work username and password. The configuration details are sent in the welcome email.
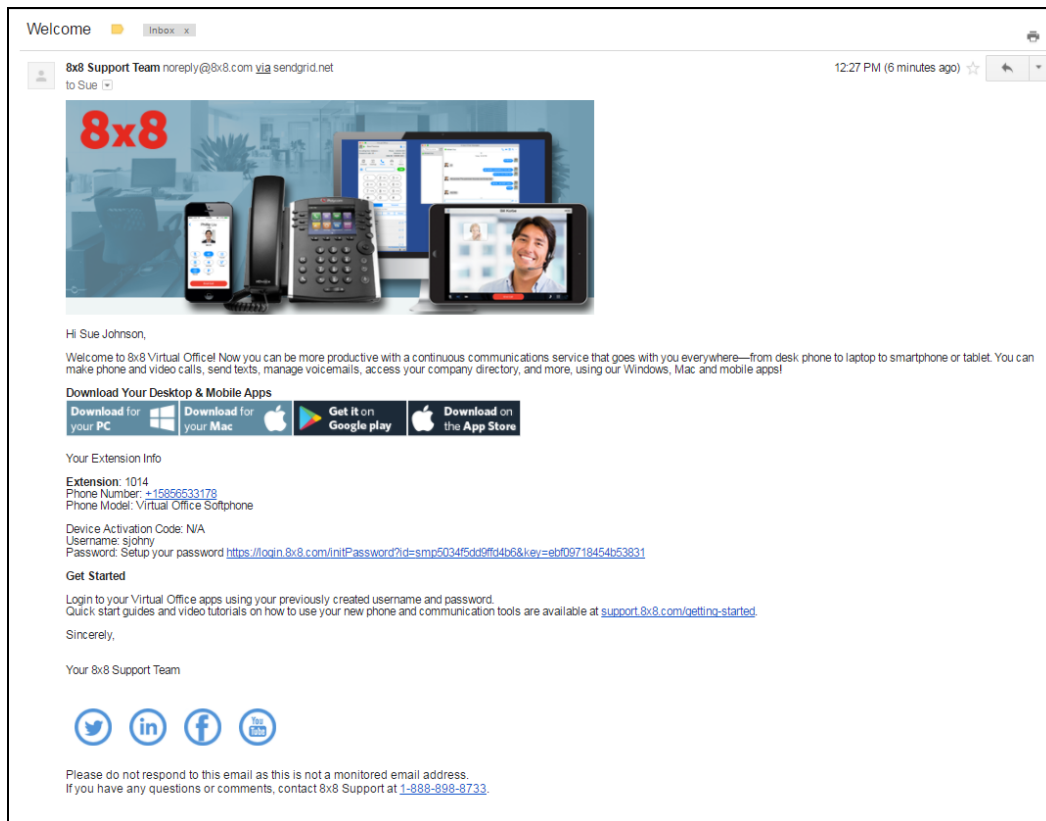
From **Home > Users**, click ✏ next to the desired user. The user profile opens in which you can edit the user's account.

From **Home > Users**, click ⋮ next to the desired user, and select **Deactivate User**. If you proceed, the user cannot log in to any 8x8 applications or make or receive calls, but the user can make emergency calls if the user is assigned a desk phone.

From **Home > Users**, click ⋮ next to the desired user, and select **Delete User**. If you proceed, the user cannot log in to any 8x8 application, any hardware endpoints associated with the user become inactive, the user cannot make calls (including emergency calls) or receive calls. All content such as voicemails, call recordings, messages, and faxes are also deleted. The user's telephone number is released.

1. From **Home** > **Company**, click the **Blocked SMS** tab.

2. On the upper-right corner, click **Add new numbers**.

3. Enter the phone numbers to block SMS from. Make sure to enter it in the E.164 format (for example +1 (408) 876 6543).
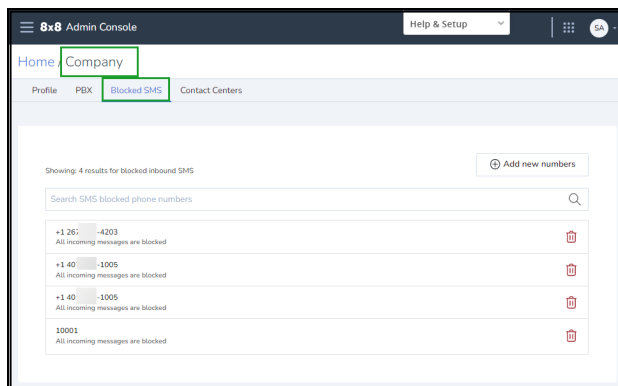
1. As an 8x8 Work user, from the user **Account Settings** > **Blocked SMS**.

2. In the user **Account settings** > **Blocked SMS** numbers list, the numbers blocked by users display first. At the end of the list, numbers blocked by admins display after numbers blocked by the user. However, the numbers blocked by admins cannot be removed or edited by the user.

To see how to access the list of blocked SMS numbers as an end-user, click here.
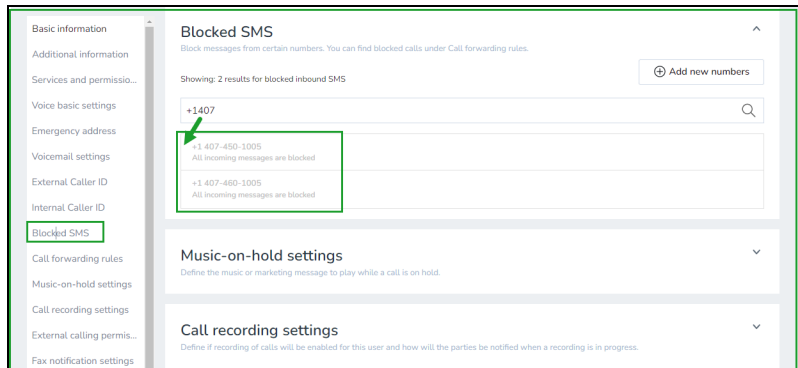
> **Notes**:
> - Numbers blocked by a user block the inbound SMSs only for that user extension, on UC only or 8x8 Work apps.
> - Numbers blocked by admins block the inbound SMSs for all their users/extensions, in CC and UC.
> - If both the user and the admin block the same phone number, only the admin record will be displayed on the users' list, without any editing permissions.

> **Note**: Make sure you have completed your SMS registration before enabling an SMS .

1. From **Home** > **Users**, search for the user you want to manage the SMS enabled

    capability, and click **Edit**   in the respective row.

2. In the **Edit** page, click **SMS enabled numbers** in the left menu, and under **SMS enabled numbers**, enable or disable the SMS capability by selecting the toggle on/off.

3. Click **Save**.

> **Note**: If users have more than one phone number assigned, you can only enable SMS for one number at a time.
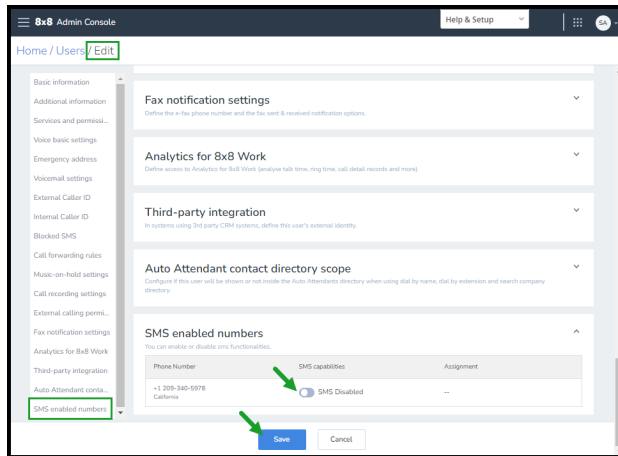
Yes; by default the language under the user's account follows the site's language but you can select a different language for each user. If you change the user's language to a different language other than site's, the language of the voice prompts, email notifications, and device display will be changed to the new language.

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Set up 8x8 Work contacts

A contact is a user without 8x8 services (licenses) and permissions. To create a contact, enter the basic information such as first name, last name, email, username, and site. The contact is created and added to the users list but cannot function as a user as no services or licenses are assigned to them yet. To create a contact in 8x8 Work, from the main menu in 8x8 Admin Console, go to **Users > + Create User**. You can save a contact and later upgrade it to a VO User with additional features. To create multiple contacts at once, see Create Users in Bulk.

To create a contact, enter first name, last name, and email address, then continue to add the following fields as needed:

- **Username:** By default, the system recommends a username created from company name, first name, and last name, and notifies you if a duplicate exists. For example, John Smith of AcmeJets Corporation sees this username by default: AcmeJets.John.Smith. If you wish to create a different username, it must be unique and never used before.

- **Site:** Site is the location of your business. By default, your phone system is assigned to a site based on the service address provided. The emergency address and language fields are derived from the site. The site's country is the default address country in the user account. You can modify the above values if needed. See how to set up sites.

- **Language:** Language controls the language of the voice prompts, email notifications, and device display.

- **Time Zone:** Time zone is used for downloading call recordings, viewing call queues, and scheduling and running reports when logged in as the current administrator.

- **Contact Directory Scope**: Define whether the user can view contacts and other users in the same PBX, site, or the entire company. A company can have multiple phone systems, multiple sites, and many users. For example, AcmeJets company has two phone systems and three sites. You can choose the user to be visible at the PBX level or at the site level.

- **Display contact in company directory:** You can hide users, rings groups, call queues, internal fax numbers, etc., from the public in the company's contact directory. If the display option is disabled, the name and number is no longer visible in contacts. To hide a user from the company's directory, go to **Home > Users > Basic information**. Click to disable the **Display contact in company directory**, and save the user.

Under Additional information, add job title, address, department, personal phone number, and custom fields if enabled.

- **Job title**: Enter the job title of the user.

- **Department:** Enter the department the user belongs to.

- **Personal contact number**: Enter the user's personal contact number such as home or mobile number. The personal contact number appears on the user's 8x8 Work for Desktop and 8x8 Work for Mobile. If you enable

Display contact in company directory in the user profile, the user's personal contact number will also appear in the company directory. For details, see our FAQ content on how to add a mobile number.

- **Custom fields**: If custom fields are enabled, they are visible as Custom Field 1, Custom Field 2, and Custom Field 3. Learn more.

Support for custom fields for migrated customers

Classic 8x8 customers who are being migrated to the X series platform are now able to access the custom fields in the contact directory. Let's say you have previously defined custom fields such as Employee ID or Company Division in Account Manager, they are now visible as Custom Field 1 and Custom Field 2 in your new 8x8 Admin Console.

Limited availability

As an 8x8 customer, you will have custom fields enabled if:

- You are being migrated from Classic to X Series (i.e. not available for native X Series customers)
- You have used custom fields for the user profiles in Account Manager (i.e. have data already)

Features

- All customers see a refined layout of the User details page.
- The Basic information section is split into Basic information and Additional information.
- Basic information holds mandatory fields and key functional fields.
- Additional information holds contact info such as address, job title, department and, if enabled, custom fields.
- Three custom fields are shown in the Additional information section.

Limitations

- Custom fields cannot be turned on or off individually

- Custom field names and types cannot be modified

- Existing names are retained during migration

- Custom field names are not shown in 8x8 Admin Console

- Custom field names are visible in Switchboard Pro

- Custom fields cannot be set or modified via bulk file upload

FAQ

Refer to the following frequently-asked questions for more information:

1. From **Home > Users**, click ✎ next to the desired user.

2. Enter a **Personal contact number**. It can be a custom number or a short number such as 5555. The system also accepts formats such as 4444*5555 where * represents a pause, or 408-444-4444#5555 where # is used before an extension. Alphabet letters and some characters are not supported. A red message indicates if a character does not pass the basic system's check.

3. Click to **Save** your changes.

Set up 8x8 Work users

A user is any Virtual Office contact assigned with 8x8 services (licenses) and permissions. If you would like your contact to communicate via phone, you need to promote it to a user by assigning a service, a telephone number, and an extension number. You may have created a contact with minimum requirements and saved in your tenant. You now need a physical device for the user and to activate it. A softphone is assigned by default.

You can create individual users or create them in bulk. To create multiple users at once, see Create Users in Bulk.

To set up users and configure additional features:

1. From the main menu in 8x8 Admin Console, go to **Users**.

2. Click **+ Create User**, or click to edit an existing contact.

3. Follow the instructions to set up additional features for the user.

4. Click to save the user.

   - The left-side navigation menu allows you to jump to the desired section quickly without having to scroll multiple screens.

   - While creating or editing a user, if you miss a field, you are navigated to the section that requires a valid value. The section with error information expands showing you a message in red. Correct the information and save.

   - When you upgrade a basic contact to become a user, a welcome email is sent automatically to the email address in the user profile notifying the user of important information such as extension info, device activation code, and password setup link.

   - To reset a user's password, go to **Home > Users** and click **Reset user password** from the ⋮ menu next to the user.

Set up additional configurations

Configure a user for more features such as voicemail, caller ID, call forwarding rules, hold music for the callers, emergency address, and more:

- Assign Services and Permissions
- Set up Voice Basic Settings
- Set up Voicemail settings

- [Set up Caller ID](#)

- [Set up Call Forwarding Rules](#)

- [Set up Music-on-hold](#)

- [Set up Call Recording](#)

- [Set up External Calling Permission](#)

- [Set up Emergency Address](#)

- [Set up Fax Notification](#)

- [Allow Access to Analytics for 8x8 Work](#)

- [Allow Third-Party Integration](#)

- [Add Users to Auto Attendant Directory](#)

- [Send Onboarding Information](#)

FAQ

Refer to the following frequently-asked questions for more information:

- To upgrade or downgrade your user license, go to **Home > Users > Services and permissions** while editing a user profile. Select a different license from the drop-down list, and click to save the user.

- To remove a user license, while editing a user, go to **Home > Users > Services and permissions**, click **x** next to the license. You receive a message that removing a service can affect the user capabilities. Click **Continue**, and save the user.

While editing a user, scroll down to **Voice basic settings**, and next to **Device model**, choose a different device from the list. You must activate the device by entering the MAC address or Activation Code.

You can activate a device by going to **Users > Voice basic settings > Device model**

and selecting an available device:

- Select **Input MAC address** to activate the device remotely. Enter the unique alphanumeric identifier assigned to the device for the user. The device is activated remotely once the user is saved. A MAC address is ideal when there is no email associated with the user, such as lobby or computer lab phones.
- Select **Use an Activation Code** to activate the device directly from the device. Once the user is saved, an automatic code is generated by the system for the device, and associated with the user. The activation code is then sent to the user in their welcome email. The user can activate the device from their desk by calling the 8x8 registration service and entering the activation code.

An audio codec is used for voice calls. The codec specifies a certain ratio between audio quality and compression. A codec with a higher compression uses less bandwidth (better for sites with a less performance-intensive internet line) but offers lower fidelity, which causes poorer sound quality.

While editing a user, scroll down to **Voicemail settings**, and click **Reset Password** next to Voicemail password. Then, enter the new voicemail password; the new password must be numeric-only and contain a minimum of six digits.

If you are in the process of porting a number to 8x8, it cannot be used as caller ID until it is verified or successfully ported. Once the number is successfully ported to 8x8, then it is automatically available in your caller ID list of numbers.

The audio file is a music or message used for callers hold music, auto attendants prompts, call queues greetings, and ring groups music. The audio file repository can be accessed from Users edit page. While editing a user, go to **Music-On-Hold** and click

Change next to the default audio file. The Audio files page opens. Click 🗑 next to the

audio file that you like to delete. You can also access the audio files from Auto
Attendant, Call Queues, and Ring Groups edit pages.

With call recording capability, 8x8 8x8 Work users can record calls, delete, and listen to
their calls from their 8x8 Work for Desktop or 8x8 Work for Mobile. While creating a user,
go to **Call Recording** and select the option to record the calls. If you allow users to
record their calls selectively, they must manually press record when a call is offered to
them. You can configure the call recording further if you want the system to announce
recording to the user, or caller, before recording. Once a call is recorded, you can access
it under the main menu's **Call Recordings**. For a quick access, filter it by date or user's
name. If a user deletes a recorded call on their end, it still shows up for the supervisor
and in the 8x8 Admin Console.

Calling country determines the destination of your calls and helps expedite dialing.

Yes, emergency address is a service location address for 911 emergency service. The
address for each user must be accurate and verified. This address is used whenever
someone makes an emergency call from that phone number or extension. By default the
system uses the site's address as the emergency address but you can choose a
different emergency address for each user.

While editing a user, go to the **Fax notification settings** and select a fax number. Enter
your choice of notification, and the user's email address to receive email notifications.
Note that the settings in 8x8 Admin Console can be changed by the user from within 8x8
Work for Desktop. To set up the fax notification, you have the following options:

- **Disable Notification:** No email notification is sent to the user when a fax is received.

- **Attachment Only:** An email notification is sent to the user with a fax message attached as a PDF. The user's email address is required to notify the users of the new internet fax.

- **Link & Attachment:** An email notification is sent to the user with both a link to the fax and an attachment. The user's email address is required to notify the users of the new internet fax.

- **Link Only:** An email is sent to the user including a link to the fax message. The user's email address is required to notify the users of the new internet fax.

To set up an analog fax machine, you need to create a user first, then assign a service and an analog fax device.

To set up an analog fax machine:

1. From the main menu in 8x8 Admin Console, go to **Users**.
2. Click **+ Create User**.
3. Enter the first and last name (such as Analog Fax Machine 1), and basic information such as the administrator's email and site.
4. Enter a service from **Services and permissions**.
5. Enter a **Phone number** that can be used for fax. An **Extension number** is also assigned to the fax machine.
6. Assign an **Analog fax device** and activate it.
7. Click **Save** to save the user's new settings.

You can forward your faxes from an analog fax machine to another user when the fax machine is broken or not responding. To forward your faxes, you need to set up call forwarding rules for the analog fax machine. Create and save a user with the proper services and permissions for the analog fax machine and assign the analog fax device before you set up the call forwarding rules

To forward analog faxes:

1. From the main menu in 8x8 Admin Console, go to **Users**.

2. Click **+ Create User**.

3. Enter the name and basic information for the fax machine, such as Analog Fax Machine 1.

4. Enter a service from **Services and permissions**.

5. Enter a **Phone number** that can be used for fax. An **Extension number** is also assigned to the fax machine.

6. Assign an **Analog fax device** and activate it.

7. Open **Call forwarding rules**.

8. Edit rules for when the Internet connection is down, or the system is not working.

9. Click to **Save** the analog fax user.

Assign services and permissions to the user

The license type you assign to a user determines the scope of available phone features, such as basic calling to advance collaborative capabilities. A list of available and active licenses for the tenant are shown under Services and permissions.

You can choose any license from the license drop-down, whether upgrade or downgrade. When you downgrade a license, the user's phone number, extension number, call forwarding rules, and other shared settings between licenses are preserved. The system automatically changes the features that are not shared between the licenses such as Switchboard Pro or Analytics for 8x8 Work. For example, when you downgrade a user license,Analytics for 8x8 Work automatically changes from Supervisor to Essentials. When you upgrade a license, however, you still need to configure the user profile to allow the new feature capabilities. In the above example, you need to modify the user profile to allow the supervisor capabilities instead of regular user for Analytics for 8x8 Work. Depending on your subscription, the licenses can be 8x8 Contact Center Editions or X Series. For details, see our content on Review Licenses.

To assign licenses to users:

1. Go to **Home > Users** and click to edit an existing user account or create a new user.
2. Open **Services and permissions**.
3. Select and **Assign a policy profile**. The 8x8 Master User Template is selected by default.
    With the 8x8 Profile Policy you are able to restrict users from using certain capabilities of Virtual Office, such as accessing Virtual Office Meetings, upgrading to recent version of Virtual Office Desktop app, or accessing and deleting call recordings. You can disable these features company wide by using a master profile policy. To modify the 8x8 Master User Template, go to **Home > User policies** and click to edit the options. See Review Profile Policy.
4. Click to **Assign one or more services to user** from the list.
5. Click **Save**.

To upgrade or downgrade a user license:

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1. Go to **Home > Users**, and click **Services and permissions** while editing a user.

2. Select a different license from the drop-down list.

3. If you already have a license and would like to add a second 8x8 Work, or a 8x8 Contact Center, click + next to the first license.

4. Select and add a new license from the list.

5. Save the user.

To remove a user license:

1. Go to **Home > Users** and click **Services and permissions** while editing a user.

2. Click **X** next to the license. You receive a message that removing a service can affect the user capabilities.

3. Click **Continue**.

4. Save the user.

To view license information:

To quickly view a user license information, go to **Home > Users** and click on any user in the list. The Info Panel displays the information related to that user including the user's services and permissions

To have a general view of the list of licenses, their unassigned /total quantity, and descriptions:

1. Go to **Home > Licenses**. For the latest available licenses and services at 8x8, Inc., visit https://support.8x8.com.

2. Expand the license type whose details you want to review, and click the desired license.

3. In the license panel that opens, review how many of those licenses have been assigned to which user.

4. Optionally, you can filter the licenses by assigned, unassigned or suspended.

The suspended licenses in your system are not usable and cannot be assigned to users. A license may be placed in suspended status:

- If the license was removed from your system by the 8x8 team with the intent of reducing the billable license number. Upon removal, the license will remain in a suspended state for 30 days before being actually removed from the inventory, during which you may reinstate the license.

- If the license is associated with a user who is deactivated, then the license will be moved to a suspended state. Reactivating the user revokes the suspended state of the license.

Assign cost center

Cost centers are created in the service cloud and allow you to keep track of expenses for each department, site, or location. If a cost center is already defined for your company, you can assign a cost center to a user via **User > Service Selection > Cost Center**. {mf--do we have an updated cost center guide? this is what we noted before from SMEs: Cost center is administered from service cloud. what are the benefits of a cost center and show how selecting a cost center shows up in billing}

Set up voice basic settings

You can define extension number, phone numbers, configure device and activate it, manage line key configuration, hot desk, and more for your desk phones here.

To set up voice basic settings:

1. From the main menu in 8x8 Admin Console, go to **Users**.

2. Click to edit an existing user.

3. Follow the instructions below to set up voice basic settings, then save the user:

DID phone numbers enable the E911 services for users and are used for external calls. You can select more than one DID for users. {mf--use case?}You must only assign the claimed numbers and numbers that are ported successfully to users or work groups. If you do not have any numbers to assign, claim or port more numbers. To assign phone numbers, go to **Voice basic settings** in user's profile. See Get Telephone Numbers.

Extension numbers are used for the internal calls and to enable short dialing. Users who have their site dialing enabled, can dial each other without entering the site code. For example, if you have the site code 101 with two extensions 101**10** and 101**11**, you can dial the other party by dialing just 10 or 11.

Even with a defined site code, you can enter any extension length you like when creating a new user. If you do not follow the site code and the recommended length, the system warns you. However, you can save the user and function as long as the number is unique across all phone systems. For example, if the system suggests 10110 for extension number and you change it to 11, a warning appears that "...not respecting the site dial plan may impact short dialing". You can save the user and continue as long as there is not other user with this extension.

To see the extension numbers and the user or service they are assigned to, go to **Home > Extension Numbers**.

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> **Note:** Every user gets a softphone, which enables them to log in and use the 8x8 Work for Desktop and 8x8 Work for Mobile.

You can select a device based on your inventory and assign it to the user. See the list of supported devices by 8x8. For details, see our content on Manage Your Devices. For a quick view of the user's assigned device, go to **Home > Users** page and click the user in the list. Check Voice basic settings in the Info Panel.

8x8 supports Polycom, Cysco, Yealink phones, ATA devices, and DECT (cordless) phones among others. For DECT devices, you need to select a handset and a base. A port will be automatically assigned and the pairing PIN is presented for your convenience. For ATA devices, you need to select an ATA terminal and a port. For details, see our content on Overhead Paging for more details.

You must activate the device to be able to use it. There are two ways to activate your device:

○ **Input MAC address**: You can activate the device remotely. Select **Input MAC address** and enter the unique alphanumeric identifier assigned to the device for the user. The device is activated remotely once the user is saved. A MAC address is ideal when there is no email associated with the user, such as lobby or computer lab phones.

○ **Use an Activation Code**: You can activate the device directly from the device. Select **Use an Activation Code**. Once the user is saved, an automatic code is generated by the system for the device, and associated with the user. The activation code is then sent to the user in their welcome email. The user can activate the device from their desk by calling the 8x8 registration service and entering the activation code.

To activate a device:

1. From the main menu in 8x8 Admin Console, go to **Users**.

2. Click to edit an existing user and open **Voice basic settings**.

3. Make sure a number is assigned, then select a device from the list.

4. Click to **Save** the user. An activation code appears as soon as the user is saved.

DECT phones come with a base and a handset. To pair the handset to the base and activate the cordless DECT phones, you need a four-digit pairing pin. The pairing pin is displayed in the read-only field in **Users > Voice basic settings** for easier access and to facilitate the process. See How to assign DECT phones to users.

To access the pairing pin, while editing a user, go to **Voice basic settings** and select a DECT handset and base. Pairing PIN appears next to the device model. See our knowledge base article: How do I activate my cordless IP DECT phones. The pairing pin is also sent to the user via the Welcome email.

Select Preferred Codec for your audio quality. The best option is given by default, but you can change the selection at any time.

> **Note:** An audio codec is used for voice calls. The codec specifies a certain ratio between audio quality and compression. A codec with a higher compression uses less bandwidth (better for sites with a less performance-intensive internet line) but offers lower fidelity which causes poorer sound quality.

Enable Hot Desk to turn the device into a shared desk phone and allow other users to use it as their own. Any user's device with a proper license can be enabled for Hot Desk. With the 8x8 Hot Desk feature, employees log in to a shared phone that immediately behaves like their own extension. They can make and receive calls, and check their messages. 8x8 Hot Desk extensions help employees have a more personalized, secure, and convenient phone experience, whether traveling to other offices or working a shift at a shared desk. The Hot Desk user is not able to use 8x8 Work for Desktop or 8x8 Work for Mobile. To enable Hot Desk, go to **Home > Users > Voice basic settings > Enable Hot Desk**. See our document about Hot Desk and how to enable it.

Transport Layer Security (TLS) and Secure Real-time Transfer Protocol (SRTP) are standard protocols for securing VoIP traffic. SRTP which is intended to provide encryption, message authentication and integrity, and protection, is enabled by default for all devices. Disabling TLS/SRTP switches the endpoints over to User Datagram Protocol (UDP) and Real-time Transport Protocol (RTP).
To disable the SRTP, while creating or editing a user, go to **Home > Users > Voice Basic Settings**. Make sure you have a device selected such as Polcom VVX 301. Disable **Enable Secure Real-time Protocol** and save the changes.

> **Note:** Disabling TLS/SRTP switches the endpoints over to User Datagram Protocol (UDP) and Real-time Transport Protocol (RTP). {mf--should this be considered a limitation? questioned by Truong}

Features

- Offer standard protocols for securing VoIP traffic.
- TLS/SRTP is enabled by default for each endpoint.You can turn it off per user's endpoint.

Set up voicemail settings

As a phone system administrator, you can define voicemail greetings, and set up voicemail notification and voicemail password for each user. Whether it is an external voicemail greeting, internal voicemail greeting, or general voicemail greeting, you can manage them all from the user's profile:

- **External voicemail greeting**: Greeting played for people outside the company. In the absence of a custom external voicemail greeting, the default audio greeting is played.

- **Internal voicemail greeting**: Greeting played for people inside the company. In the absence of a custom internal voicemail greeting, the default audio greeting is played.

- **Voicemail name and last name**: For general voicemail greeting, you have two options: either choose the default message that includes the user's extension number, or replace the user's extension number with the user's first name and last name in the default message:

  - **Option 1:** General voicemail greeting by default contains the user's extension number, such as: "You have reached the voicemail of [1002]... "

  - **Option 2:** General voicemail greeting contains recorded first name and last name, such as "You have reached the voicemail of [Robin Shasta]..."

> **Note:** Voicemail name and last name greeting is also used for auto attendant's voicemail when accessed through the company directory.

To set up an external voicemail greeting:

1. Go to **Home > Users**.
2. While editing a user, open **Voicemail settings**.
3. Go to **External voicemail greeting**.
4. Click **Change** to open the audio files library. In the absence of a custom greeting, the default audio file will be used.
5. Click **Save**.

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When using the default voicemail greeting (i.e. 'you have reached the voicemail of') this message will be used to identify the target. Also used to identify targets in the Auto Attendant's dial by company directory feature.

To set up an voicemail name and last name:

1. Go to **Home > Users**.

2. While editing a user, open **Voicemail settings**.

3. Go to **Voicemail name and last name**.

4. Click **Change** to open the audio files library. In the absence of a custom greeting, the default audio file will be used. By default, the voicemail greeting contains the user's extension number, such as: "You have reached the voicemail of [1002]. " You can record first name and last name, such as "You have reached the voicemail of [Robin Shasta]." For details, see our content on how to manage audio files library.

5. Click **Save**.

To set up an internal voicemail greeting:

1. Go to **Home > Users**.

2. While editing a user, open **Voicemail settings**.

3. Go to **Internal voicemail greeting**.

4. Click **Change** to open the audio files library. In the absence of a custom greeting, the default audio file will be used.

5. Upload, record, or select the internal voicemail greeting audio file. For details, see our content on how to manage audio files library.

6. Click **Save**.

Users can receive a voicemail attachment or a voicemail notification via an email when a new voicemail message is left for them. For users without an email address, you can disable the email notification.

To access the voicemail settings:

1. Go to **Home > Users**.

2. While editing a user, open **Voicemail settings**.

3. Select the desired **Notification**.

4. Enter an **Email** address to send the notification to.

5. Click **Save**.

You can allow users to set up their own voicemail access PIN. They receive an email with the instructions to set up their PIN. They need to dial 555 from their device, and enter the number when prompted. For users without an email address, the administrator can set up a voicemail access PIN. The access PIN must have a minimum of six digits.

To reset the voicemail Access PIN:

1. Go to **Home > Users**.

2. While editing a user, under **Voicemail settings**, you can choose to:.

3. Under **Voicemail access PIN**, you can:

   - Click **Users will set their own access PIN** to allow users to set up their own voicemail access PIN.

   - Click **Set access PIN** to set up a voicemail access PIN for users without an email address. The access PIN must be digits only, having a minimum of six and maximum 15 digits, not sequential.

     ◦ Enter an **Access PIN** and retype to confirm.

     ◦ Click **Save**

![8x8]
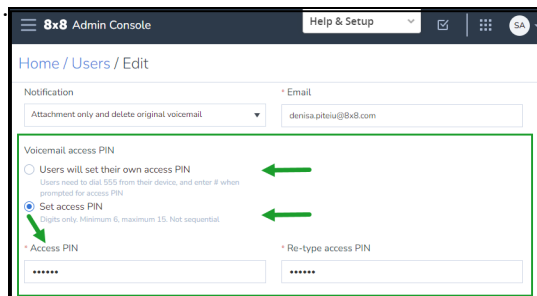
Callers who reach your voicemail can dial zero and be redirected to another destination as defined in your forward option. If this option is enabled for the user, callers can dial 0 anytime during the voicemail message to be forwarded to a contact or service. This option is disabled by default. Update your voicemail greetings to inform your users.

To redirect callers from voicemail by dialing zero:

1. Go to **Home > Users**.

2. While editing a user, open **Voicemail settings**.

3. Click to enable **Custom 0 Dial out**.

4. Select a user or service under **On pressing 0 forward to** to direct your incoming calls. This option appears only after you enable the **Custom 0 Dial out** option above. Callers who reach your voicemail can dial 0 to be redirected to any destination you specify here. If you have set up a site receptionist for the site, the site receptionist appears by default for custom zero dial out.

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> **Note:** According to HIPAA guidelines, it is considered unsafe to send an attachment that can be forwarded. Therefore, administrators should set users to Notification Only. Be sure to lock the setting so that users cannot change this setting from within the 8x8 Work for Desktop.

Manage audio files library

An audio file is a music or message used for voicemail greetings. All audio files are either uploaded or recorded by administrators and deposited in a central location. Audio files can be accessed via 8x8 Admin Console main menu. You can view the list of uploaded audio files, search, play, edit, delete, and download them from a central location.

Notes can be used to add context to your audio files. For example, if you provide your audio file in multiple languages, you can leave a note to indicate the language in which the file is recorded. For easier audio file location, you can sort the list by Name and Notes columns.

To manage audio file repository:

1. Log in to 8x8 Admin Console.

2. In the main menu, go to **Home > Audio Files**.

3. Click **+Create Audio Files** then select one of the following options:

   - **By uploading an audio file**: Upload an existing or pre-recorded audio file from your file directory. Enter a name and a note for the audio file to find it easier in the future. A note can indicate the language of the audio file, for example. Browse and select an audio file from your computer directories, and save.

   - **By calling a number to record**: Record a new audio file just like when you leave a voice message. Provide a name and a note for this new audio file to find it easier in the future. A note can indicate the language of the audio file, for example. Enter your phone number/ extension and save. The system calls your extension or the number you entered and prompts you to record a new audio message.

4. Click ▶ to play the audio file.

5. Click **1x** to control the playing speed when listening to the music. You can select from 0.5x, 1x, or 2x.

6. Click ⬇ to download and save to another location.

7. Click ⋮ to edit or delete the audio file.
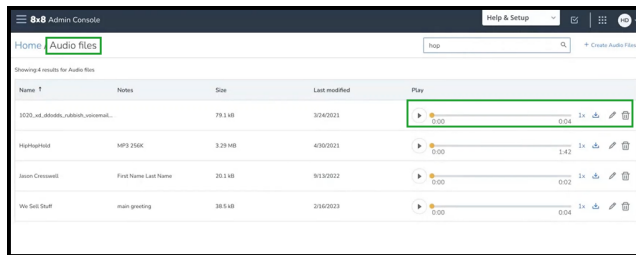
Audio files repository can also be accessed from **Users** edit page. While editing a user, go to **Voicemail settings >
Default audio file will be used** and click **Change**. You can also access the audio files from Users > Music-on-hold,
Auto Attendant > Call Handling Menus, Call Queues > IVR Message, Call Queues > Voicemail settings, and Ring
Groups > Voicemail settings.

Search for specific audio files

You now can narrow a list of selectable audio files by searching them by name (Voicemail, Auto Attendants, Music on
Hold, Call Queues etc.), wherever audio files are selectable.

Let's say you want to look for a specific audio file from a long list of audio files. You now can simply search it by
name:

- In the Admin Console **Home** > **Audio Files** page, enter the entire name or part of the file name in the **Search** box.
  The audio file displays.
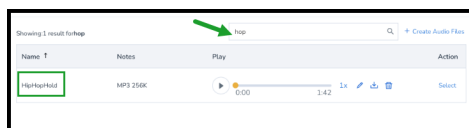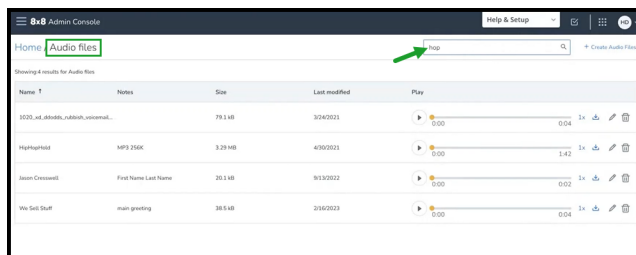
Set up caller ID

A caller ID shows who is calling before you pick up the phone by displaying caller name and number on your phone screen. The internal caller ID provides the caller's number, and name when available. The external caller ID sends a caller's number and name to the recipients so that they can recognize the calling party. As a phone system administrator, you can set up or block the internal and external caller ID for each user. If the user is a member of a ring group or a call queue, they can select the corresponding caller ID when desired. Multiple users can share a caller ID, for example, all users in a small company can share the caller ID of the official company name and number so customers can identify the calls easily. Users can select from the available caller ID numbers or an anonymous caller ID from their profile. If you are porting a number, it must be validated before you can use it as the caller ID, or a temporary number for that porting order will be used until the porting number is validated.

Features

- **External Caller ID**: Ability to set up caller ID when you call contacts outside your company. The external caller ID includes the user's display name and phone number. You can either display the user's work number, or the company's shared caller ID. Personal contact numbers cannot be used as external caller ID.
- **Internal Caller ID**: Ability to set up caller ID when you call employees within your company. The internal caller ID shows the user's first and last name as well as their extension numbers. As an administrator, you can choose to disable the user's internal caller ID.
- **Shared Caller ID**: Set up any phone number in the system as shared caller ID and make the number available to all users. For example, in a small company, employees can share the caller ID of the official company name and number so customers can identify the calls easily.
- **Work Group Caller ID**: Ability to set your call queue or ring group caller ID when you dial out as a member of the work group.

You can define the external caller ID to be displayed on the recipient's device when dialing outside the company. When you block the external Caller ID, the external calls made by the user does not include any information about the user.

To set up the external caller ID:

1. Go to **Home > Users**.

2. While editing a user's profile, go to **External Caller ID**.

3. Enter a name in **Display name** and the **Phone numbers** to display, or you can select a shared caller ID instead.

4. To block the user's information from being displayed in the external calls, click to enable **Block External Caller ID**.

You can define the internal caller ID to be displayed on the recipient's device whenever dialing inside the company. Alternatively, you can choose not to display the user's caller ID for the internal calls.

To set up internal caller ID:

1. Go to **Home > Users**.

2. While editing a user's profile, go to **Internal Caller ID**.

3. Enter the users **First name** and **Last name** if you would like it to be different from what is already displayed. The user's first name and last name is populated in those fields by default. Note that the user's extension number is also displayed by default.

4. To not display the user's name in the internal calls, click to disable **Display internal Caller ID**.

The Shared Caller ID or company's caller ID is the number you choose to be displayed for your external calls. You first need to designate a phone number as your shared caller ID and then select that number as the user's external caller ID:

To create a shared caller ID:

1. Go to **Home > Phone Numbers**.

2. Choose a phone number and select **Use as shared caller ID** from the ⋮ menu .
   This number will be available for selection as the user's external caller ID.

3. Enter a common name, and click **Save**.
   The common name will be used as the caller ID by all users when dialing out with

this number, The number appears as **Enabled** under **External Caller ID** showing the common name as the display name. You can choose more than one shared caller ID.

4. While editing a user, go to **External Caller ID**.

5. Select a shared phone number from the list. The **Display Name** is automatically populated.

6. Click **Save**.

Set up call forwarding rules

Call forwarding rules or One Number Access (ONA) is used to forward the incoming calls to a desired individual or service. Call forwarding rules are accessible by administrators from within the 8x8 Admin Console, and by users from 8x8 Work for Desktop and 8x8 Work for Mobile.

Features

- **When**: Forward the incoming calls when the Internet connection is down, the user is busy or cannot answer the calls, or when the calls are coming from a caller whose number is blocked.
- **Where to**: Choose to forward all calls to voicemail, another user, or a service. Maybe you do not like to forward any calls, but simply play a busy tone. Then clear the granular rules and do not forward any calls.
- **Who**: Administrators can edit the existing call forwarding rules for a user or create a new rule.
- **How**: Arrange the calls to be forwarded on a specific date and time or based on a recurring schedule. When defining the call forwarding rules, you can determine how long the call should be ringing, or select a few users and determine if you like their phones to ring sequentially or simultaneously:

To define call forwarding rule:

1. Go to **Home > Users** and click to edit a user's profile.
2. Scroll down to **Call forwarding rules**.
3. Keep the check box next to the following options selected to accept the default rules,

   or click ✏ next to each rule to customize the existing rule:

   - **Forward all calls**: If selected, this option forwards all calls to voicemail by default. You can choose to forward the calls to a selected user or service.
   - **When internet connection is down**: If selected, this option forwards all calls to voicemail by default.You can choose to not forward the calls and play busy, select another target to forward the calls to, or forward them to a custom number.

- **When user is busy**: If selected, this option forwards all calls to voicemail by default. You can choose to not forward the calls and play busy, select another target to forward the calls to, or forward them to a custom number.

- **When user does not answer the call within 15 seconds**: If selected, this option forwards all calls to voicemail by default. You can choose to not forward the calls and play busy, select another target to forward the calls to, or forward them to a custom number. You can set this duration as desired.

- **When user gets a call from a blocked caller**: If selected, the calls coming from the blocked numbers that are added to list are rejected.

4. Click **Save**. The new rule appears under **Call forwarding rules**. You can edit or delete the new rule whenever needed.

You can create your own call forwarding rules if you do not find the one that suits your need in the list.

To create a new call forwarding rule:

1. Go to **Home > Users** to create or edit a user profile.

2. In the user's profile page, go to **Call forwarding rules**.

3. Click **+ Add new rule**, and enter a name.

4. Specify your rules such as when to apply this rule, during what time, or where to forward the calls to.
   For selected users, you can enter your number partially, such as area code 1 408. The system finds and presents the numbers that match.

5. Click **Save**. The new rule appears under **Call forwarding rules**. You can edit or delete the new rule.

6. To take this rule into effect, select the check box next to the rule in the list of call forwarding rules.

7. Click **Save** to save the user's new settings.

You need to maintain your call forwarding rules as the need or number changes, the user moves, or the time is shifted.

To edit or delete a custom call forwarding rules:

1. Go to **Home > Users** to create or edit a user profile.

2. In the user's profile page, go to **Call forwarding rules**.

3. Click ✎ next to a rule and make changes.

    For selected users, you can enter your number partially, such as area code 1 408. The system finds and presents the numbers that match.

4. Click **Save**. Your call forwarding rule now is saved.

5. To take the rule into effect, select the check box next to the rule, in the list of call forwarding rules.

6. Click **Save** to save the user's new settings.

To add a custom destination to forward your calls:

1. Go to **Home > Users** to create or edit a user profile.

2. In the user's profile page, go to **Call forwarding rules**.

3. Click ✎ to edit **Forward all calls**.

4. Click **Selected user or service**.

5. Enter your custom destination such as 500 and click **Save**. For selected users, you can enter your number partially, such as area code 1 408. The system finds and presents the numbers that match.

6. To take this rule into effect, select the check box next to the rule in the list of call forwarding rules.

7. Click **Save** to save the user's new settings.
    For all other call forwarding rules, select **Forward directly to** and enter your custom destination before you save.

To block the unwanted calls via call forwarding:

1. Go to **Home > Users** to create or edit a user profile.

2. In the user's profile page, go to **Call forwarding rules**.

3. Click ✎ to edit **When user gets a call from a blocked caller**.

4. Search the contacts you would like to block under **Selected callers**. For selected users, you can enter your number partially, such as area code 1 408. The system finds and presents the numbers that match.

5. Click to **Add to the list**. These are callers you would like to block or avoid responding. Note that for blocked callers, you can only forward their calls to **No one and play busy**.

6. Click to **Save** the blocked caller rule.

7. To take this rule into effect, select the check box next to the rule in the list of call forwarding rules.

8. Click **Save** to save the user's new settings.

To set up an analog fax machine, you need to create a user first, then assign a service and an analog fax device.

To set up an analog fax machine:

1. From the main menu in 8x8 Admin Console, go to **Users**.

2. Click **+ Create User**.

3. Enter the first and last name (such as Analog Fax Machine 1), and basic information such as the administrator's email and site.

4. Enter a service from **Services and permissions**.

5. Enter a **Phone number** that can be used for fax. An **Extension number** is also assigned to the fax machine.

6. Assign an **Analog fax device** and activate it.

7. Click **Save** to save the user's new settings.

    Now that you have the user, create a new call forwarding rule to forward the calls to the Analog Fax Device.

FAQ

Refer to the following frequently-asked questions for more information:

You can forward your faxes from an analog fax machine to another user when the fax machine is broken or not responding. To forward your faxes, you need to set up call forwarding rules for the analog fax machine. Create and save a user with the proper services and permissions for the analog fax machine and assign the analog fax device before you set up the call forwarding rules

To forward analog faxes:

1. From the main menu in 8x8 Admin Console, go to **Users**.

2. Click **+ Create User**.

3. Enter the name and basic information for the fax machine, such as Analog Fax Machine 1.

4. Enter a service from **Services and permissions**.

5. Enter a **Phone number** that can be used for fax. An **Extension number** is also assigned to the fax machine.

6. Assign an **Analog fax device** and activate it.

7. Open **Call forwarding rules**.

8. Edit rules for when the Internet connection is down, or the system is not working.

9. Click **Save** to save the user's changes.

Set up music-on-hold

8x8 Work allows you to replace dead air with hold music or your business announcement. When you put your callers on hold, you can play a hold music or announce a marketing message until the call is resumed. See our Knowledge base article about how do I change my music-on-hold.

Features

- Allows you to replace dead air with hold music or a business announcement.
- Ability to create your own audio files whether by uploading or recording your own announcement.
- Ability to create and access the hold music library from within the user profile.
- Ability to play the hold music or announcement at a variety of speed.
- Ability to change or delete the hold music from within the user profile

Limitations

- Hold music plays from the beginning of the file, but not continuously.
- Cannot remove a music file from a user profile without deleting it from the music library. As a work around, create a temporary audio file, point to that file from the user's profile and then delete the temporary file. The hold music on user profile is reset to the default hold music.{mf--Once bulk edit via BPS is GA (ETA this quarter), you will be able to do it in bulk via CSV edits.shall I add it as a limitation}

To assign hold music to a user:

1. Go to **Home > Users**.
2. While creating or editing an existing user profile, scroll down to see **Music-on-hold**.
3. If you have not defined any hold music for this user, the default audio file is played each time a caller is placed on hold. Click **Change** to open the audio files library. For details, see our content on Manage Audio Files Library.
   In the audio files library, you can see the uploaded audio files. The audio files must

have AU, WAV, VOX, and MP3 the format, and be 10 MB or smaller. You can listen to a music file, play it at a different speed, edit its name, download on your computer, or delete it from the list.

4. Click **Select** to add the music to the user's profile and **Save**. The hold music will be offered to the callers who contact the user.

As an administrator, you can add or record new audio files to the audio library, and replace the default audio with a custom audio file. The audio files must have the AU, WAV, VOX, and MP3 format.

To add a hold music audio file:

1. Go to **Home > Users**.
2. While creating or editing an existing user profile, scroll down to see **Music-on-hold**.
3. Click **Change** to open the audio files.
4. In the audio files library, select an existing audio file from the list, or click **+ Create Audio Files** to upload a new file.
5. Select **By uploading an audio file** from the menu. See how you can call to record a new audio file.
6. Enter a **Name** for the recording and a **Note** to yourself to make it easier to find later. The recording can be an existing and professionally created audio file.
7. Click **Save**.
   The audio file is added to your audio files library. You can select the new audio file to be added to the user profile and save.

To record an audio file:

1. Go to **Home > Users**.
2. While creating or editing an existing user profile, scroll down to see **Music-on-hold**.
3. Click **Change** to open the audio files.

4. In the audio files library, click **+ Create Audio Files**.

5. Select **By calling a number to record** from the menu.

6. Enter a **Name** and a **Note** for the recording to make it easier to find later.

7. Enter a **Phone Number or Extension** on which you would like to record your initial greeting, and click **Call now**.
   The system will call your extension or a specified number and prompt you to record a new audio.

8. Follow the 8x8 recording instructions, and click **Save** when finished.
   The recording appears in the audio file library.

9. **Select** the new recorded audio to add it to the user's profile music on hold.

10. Click to **Save** the user profile.

You can change Music-on-hold for multiple users via Bulk Edit. Prior to this release, you could change the Music-on-hold for each user individually.

To change the Music-on-hold in bulk:

1. Go to the **Users** page and select the users you would like to update.

2. Click **Bulk Edit**.

3. Select **Music-on-hold settings** and click **Change** to choose one from the list.

4. Click **Select**. The new music-on-hold appears .

5. Click **Continue**.

6. Review the report to see whether all selected users with their music-on-hold are correctly updated. Click **Confirm Bulk Edits**. A new task is created. You can monitor the task's progress in the Tasks area.

To delete the existing hold music:

1. Go to **Home > Users**.

2. While creating or editing an existing user profile, scroll down to see **Music-on-hold**.

8x8

3. Click **Change** to open the audio files.

4. Select the music file you had selected for your music on hold, and click 🗑 .

   The music on hold is deleted from the user's profile page. {mf--Is there a way to remove the custom music-on-hold for a user without deleting the audio file from the library? I would like to use the default music-on-hold for a short time but do not want to delete the audio file from the music library as I may use it later or for my other users.}

5. Click to **Save** the user profile.

FAQ

Refer to the following frequently-asked questions for more information:

The audio file is a music or message used for callers hold music, auto attendants prompts, call queues greetings, and ring groups music. The audio file repository can be accessed from Users edit page. While editing a user, go to **Music-On-Hold** and click

Change next to the default audio file. The Audio files page opens. Click 🗑 next to the audio file that you like to delete. You can also access the audio files from Auto Attendant, Call Queues, and Ring Groups edit pages.

Set up call recording

If configured by the phone system administrator, 8x8 8x8 Work users can record their own incoming and outgoing calls, play them back, download, or delete them. Phone system administrators can configure call recording settings per user by going to **User > Call recording settings**.

Features

- Users can record their calls selectively, or all calls can be recorded automatically for the user.
- Administrators can prevent users from recording their calls.
- Announce the call recording to the involved parties: user, caller, or both.
- Administrators can record calls without announcing it to either party.

Set up call recording for a user to define if recording calls is enabled for this user and how will the parties be notified when a recording is in progress. If it is configured by the administrator, users can record calls on their 8x8 Work for Desktop or 8x8 Work for Mobile.

To set up call recording:

1. Go to **Home > Users**.
2. While creating or editing an existing user profile, scroll down to see **Call recording settings**.
3. For **Call recording mode**, you can determine the user's recording permissions. Users can record their calls selectively, or all calls can be recorded automatically for the user. Administrators can prevent users from recording their calls.
   Select one of the followings:
   - **Allow user to record calls selectively** - allows users to select which session to record.
   - **Record all calls with user control** - allows all calls to be recorded automatically for a particular user.
   - **Record all calls for this user** - allows users to switch off the recording if there is no need to record the conversation (covering topics that should not be recorded).
   - **Never record calls for this user** - never allow users to record calls.
4. For **Recording announcement**, determine who should know that the call is being recorded. The call recording announcement informs the involved parties that their call is being recorded. It can be announced to the user, the caller, or both. As an administrator, you can record calls without announcing it to either party.
   Select one of the following options to announce to involved parties that the call is being recorded:

- Me/user

- Remote party

- Both parties

- Neither

5. Click to save the changes in user profile.

    See Manage Call Recording to learn how to access the user's call recordings, download, and delete.

Set up external calling permission

Define the country to which the user will be making calls and whether or not the international dialing is enabled. Set up the external calling permission to help expedite dialing.

Define calling country

Determines the default calling country for the user created within a site, but can be overridden by the administrator at the user level. Calling country is not necessarily the home country, but often determined by the country the user calls the most. For example, if a user in US makes most of his calls to Germany, the calling country should be defined as Germany Numbering Plan.

To define calling country:

1. Go to **Home > Users** and open **External calling permission**.

2. Find a **Calling country** from the list where the calls are dialed from. {mf--this is misleading. when I say the calls are dialed from is different from where I make most of my calls to. pls clarify}

3. Select the **External calling plan**. External calling plan determines the type of calls a user can make, whether international, domestic, or emergency only. The external calling plan is tied with the Calling Country. If the calling country is defined as Germany Numbering Plan for a user based in US, an International calling plan is required for the user to make calls anywhere else in the world.

4. Click to save the user profile.

Set up emergency address

Emergency address is a location address for 911 emergency service. Enter the address that will be transmitted to emergency services when an emergency call is initiated from the desk phone. The address for each user must be accurate and verified. This address is used whenever someone makes an emergency call from this particular phone number or extension. By default the system uses the site's address as the emergency address, but you can choose a different emergency address for each user.

To set up the emergency address:

1. Go to **Home > Users**.

2. While creating or editing an existing user profile, scroll down to see **Emergency address**.

3. Under **Emergency address**, you can choose to use as emergency address the is the sane as the user's site address or enter a new emergency address.

- **A. If you use the user's site address as emergency address:**
  - Select the **Use the Site address** checkbox and use the site address as an emergency address.

> **Note**:
> - While creating a user, if you set the emergency address as a user's Site address, which cannot be validated, a warning message displays, and you cannot save the user. First, you must go to the Sites page and re-enter a valid address for the site whose address you want to use as the user's emergency address. After that, you can use that site address as the user's emergency address.
> - While editing a user and the user is saved with an invalid address, a warning displays, and you can continue saving the user.

B. If the user is not physically located in the country of their primary phone number:

○ Clear the **Use the Site address** checkbox.

> **Note**: You can enter the address in the **Select...** box to narrow the searching.

○ Optionally: If the emergency address and the user's primary phone number are not located in the same country, that number cannot be validated. Choose another address or override it.

- **C. If you enter manually a new address as emergency address**:

○ Click **Add address manually**.

○ In the **Add new address** window, select the country where the site is located.

○ Search for the address you want to add in the list below, and click **Validate**.

○ If you don't find the address in the list, select **Enter address manuall**y toggle On and enter the site address manually.

○ Click **Validate**.

- If the new address is not recognized as being valid, you can choose the option that fits you better:
  - Click **Use existing**.
  - Click **Use the address as entered**.

Once the address is confirmed as validate and eligible for the Emergency Services, click **Save**.

Add new address ✕

Country *

United Kingdom ⌄

🔵 Enter address manually

Street number *   Street name *

114   Whitechapel High Street

Address line 2

Add locality

City / Town *

London

State / Territory   Postcode *

London   E1 7PT

⊘ This does not appear to be a valid address.

Your address could not be found. Please choose an alternative option

We have identified the following validated address. Please choose the address that is closest to your current location

🔘 Use existing: 114 Whitechapel High Street, London, E1 7PT

○ Use the address as entered

   ☑ I acknowledge that this address may not be eligible for Emergency Services. In
     the event of an emergency, I acknowledge that an Emergency Services operator
     may not have access to a user's location information.

Cancel   **Select**

Notes:

- In the US only, a third-party entity (Emergency Validation provider) checks the address from the emergency registration perspective.

- You can override an existing address, but it might not be registered for Emergency Services if it's not validated.

Set up fax notification

You can notify a user via email when the user sends or receives a fax. Enter a fax number you would like to receive the notification for, and an email address for the email notification. You can choose whether a user receives email notifications when they send or receive a fax. The notification can be sent as a link in an email, an email attachment, or both.

To set up the fax notification for a user:

1. Go to **Home > Users.**

2. While creating or editing an existing user profile, scroll down to see **Fax notification settings**.

3. Enter a **Fax number**. You can free up or port numbers if needed.

4. The **Notification email** is the user's email. Enter a different email address if needed.

5. For **Notify me by email when I receive a fax**, select or disable email notification. **Disable notification** is the default setting.

6. For **Notify me by email when I send a fax**, select or disable email notification. **Disable notification** is the default setting.

7. Click to save the user profile. Once the fax numbers are assigned to users, they can simply log into the 8x8 Work for Desktop, go to the fax tab, and send and receive faxes.

> **Note**: The updates are both ways, that is, the changes to 8x8 Admin Console updates the user's settings in 8x8 Work for Desktop and the changes made by the user in 8x8 Work for Desktop updates

the fax notification settings in 8x8 Admin Console.
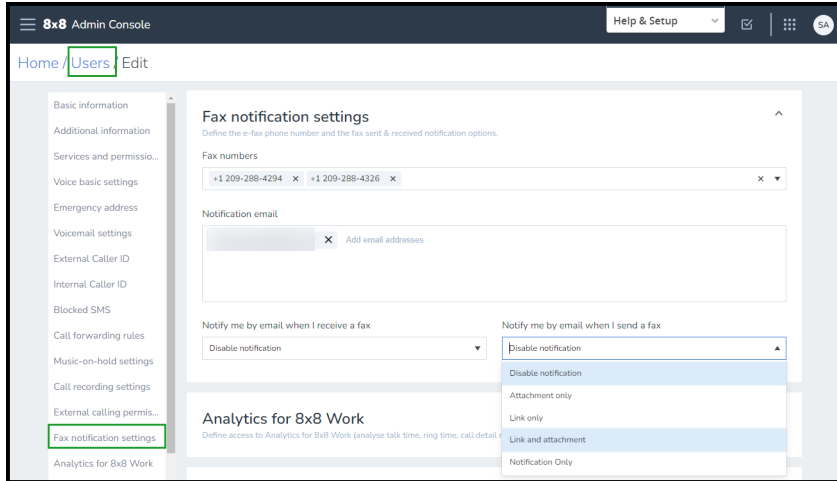
Allow access to Analytics for 8x8 Work

Depending on your 8x8 subscription, you can allow users access to Analytics for 8x8 Work. The reports in 8x8 Analytics for Contact Center offer rapid insights into historical and real-time information associated with all extensions and devices in your phone system. Using these metrics, you can analyze talk time, ring time, call detail records, and more. By default, users do not have access to Analytics for 8x8 Work. See our user guide for Analytics for 8x8 Work for more information.

You can set up users with the following access levels for 8x8 Analytics for Contact Center:

- **Analytics: Essentials**: Provides access to key call metrics through dashboards and reporting options for all users.

  ○ Call Report (Includes all reports with call metrics)

  ○ Employee Report (Includes reports related to employee status and activities)

- **Analytics: Supervisor**: Provides access to real-time view of all call activity for selected call queues or ring groups within the 8x8 cloud phone services. Users get comprehensive reporting in a single dashboard view, which is available on any device.

  ○ Call Report (Includes all reports with call metrics)

  ○ Call Quality (Includes all reports related to call quality)

  ○ Call Queue (Includes all reports related to call queues)

  ○ Ring Group (Includes all reports related to ring groups)

  ○ Employee Report (Includes reports related to employee status and activities)

  ○ Device Report (Device status report)

  ○ Business Hours (Call volume metrics)

To define users access to Analytics for 8x8 Work:

1. In 8x8 Admin Console, go to **Home > Users**.

2. While creating or editing the user, scroll down to **Analytics for 8x8 Work**.

3. Select **Analytics: Essentials** or **Analytics: Supervisor** from the list.

or select **None, do not allow access to Analytics for 8x8 Work** if you want to prevent access.

4. Click to save the user profile.

Allow third-party integration

If you are integrating 8x8 Work or 8x8 Contact Center with an external CRM (such as NetSuite or Salesforce), enter the user's external identity such as CRM and username. Once saved, the user is able to use 8x8 Work services through external authentication. If you are using Single Sign-On support, external CRM users are automatically signed in to 8x8 Work integration once they log in to the CRM. It eliminates the need for a separate login.

> **Note:** Users require a dedicated 8x8 Work integration plug-in or app on their third-party system.

To define users external identity:

1. In 8x8 Admin Console, go to **Home > Users**.
2. While creating or editing the user, scroll down to see **Third-party integration**.
3. Select a **Third party** such as NetSuiteID, or Salesforce ID from the list.
4. Enter the **Username**, the external party's email address.
5. Click to save the user profile.

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Add users to auto attendant directory

You can add to or hide users from the auto attendant directory by going to **Home > Users > Auto Attendant contact directory scope**. If the option is added, the user appears when a caller dials by name or extension, or when the caller searches the company directory. If the option is not added, the caller cannot find the user in the auto attendant directory via the menu. For details regarding auto attendant, see our content on Set up Automatic Call Handling.

To add users to auto attendant contact directory:

1. In 8x8 Admin Console, go to **Home > Users**.
2. While creating or editing the user, scroll down to see **Auto Attendant contact directory scope**.
3. Click to enable **Add this user to the Auto Attendant directory**.
4. Click to save the user profile.

Send onboarding information

When you assign a service to a contact (upgrade a contact to a user) or create a new user, the system automatically sends a welcome email to the user. The welcome email includes the user's name, extension and phone number, the phone model, and more.

To disable sending onboarding information to users:

1. In 8x8 Admin Console, go to **Home > Users**.
2. While creating or editing the user, scroll down to see **Onboarding information**.

3. Click to disable **Send welcome email**. This option is enabled for new users by default.

4. Click to save the user profile.
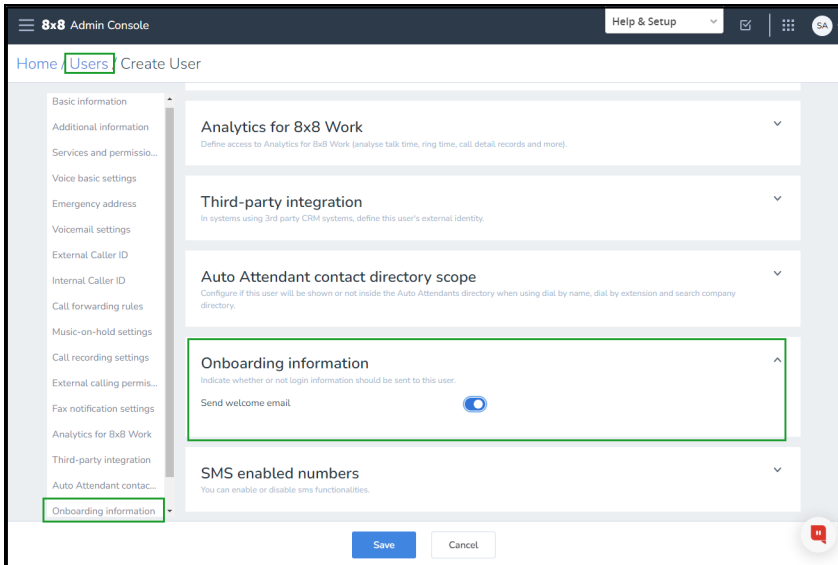
You can send a welcome email later after a user is created. Go to **Home > Users** and click **Send welcome email** from the ⋮ menu next to the user.

Set up 8x8 Meet

8x8 Meet with 8x8 Work combines flexible communication capabilities with powerfully collaborative meetings. With 8x8 Meet, take your team meetings to the next level via integration with calendar apps, high-definition audio and video, advanced meeting management features, and much more!

To configure 8x8 Meet for your organization:

- **Set up meeting URLs for your organization**: Meeting URLs used for 8x8 Meet are based on the name of your organization; set an easy-to-remember base URL for your entire organization, and then select the default behavior of people's individual meeting URLs! In addition, you can set up how the meeting is launched or how meeting is moderated. In addition, you can set up how the meeting is launched or how a meeting is moderated.

- Salesforce integration with 8x8 Work: You can choose to enable or not Salesforce integration with 8x8 Work in one click.

- Branding: You can design your own Meeting UI for your company.

- **Set up 8x8 Spaces (optional)**: Need an in-room conferencing solution to bring remote participants into your office's meeting rooms? Now that you've set up 8x8 Meet for your organization, set up 8x8 Spaces for an enhanced in-room conferencing experience!

Set up meeting

8x8 Meet with 8x8 Work combines flexible communication capabilities with powerfully collaborative meetings. With 8x8 Meet, take your team meetings to the next level via integration with calendar apps, high-definition audio and video, advanced meeting management features, and much more!

Meeting URLs used for 8x8 Meet are based off the name of your organization; set an easy-to-remember base URL for your entire organization, and then select the default behavior of people's individual meeting URLs.

To set up your organization's meeting URLs for 8x8 Meet:

1. From the main menu in 8x8 Admin Console, go to **Meetings > Settings**.

2. In the **Settings** page, Under **Tenant name**, enter your organization's **Meeting URL tenant**. For example, a tenant of "dtna30dem" results in a base URL of "8x8.vc/dtna30dem/" for users in your organization.

3. Under **Meeting URLs**, confirm the default meeting URL behavior when a member of your organization schedules a meeting in their calendar:

- **8x8.vc/domain/firstname.lastname**: All scheduled meetings use the same URL as the person's own personal meeting space (such as "8x8.vc/acmejets/mel.black").

- **8x8.vc/domain/firstname.lastname/xyz**: Scheduled meetings use the person's personal meeting space URL as a base, but each meeting URL ends with three randomized alphanumeric characters (such as "8x8.vc/acmejets/mel.black/d20").

4. Under **Moderated meetings**, set up how the user will moderate meetings. Switch the **All meetings will be moderated only by participants from this company** toggle On. Otherwise, switch the toggle Off.

5. Under **Join before Moderator**, set up which can moderate the meetings. Switch the **A moderator is required to start a meeting** toggle On. Otherwise, switch the toggle Off.

6. Under **Meeting launch**, set up if only the moderator can launch the meeting. Switch the **A moderator is required to start a meeting** toggle On. Otherwise, switch the toggle Off.

7. Under **Meetings reactions**, set up if users can react in meetings. Switch the **Enable the Giphy integration in the meeting reactions menu** toggle On. Otherwise, switch the toggle Off.

8. Save your changes.
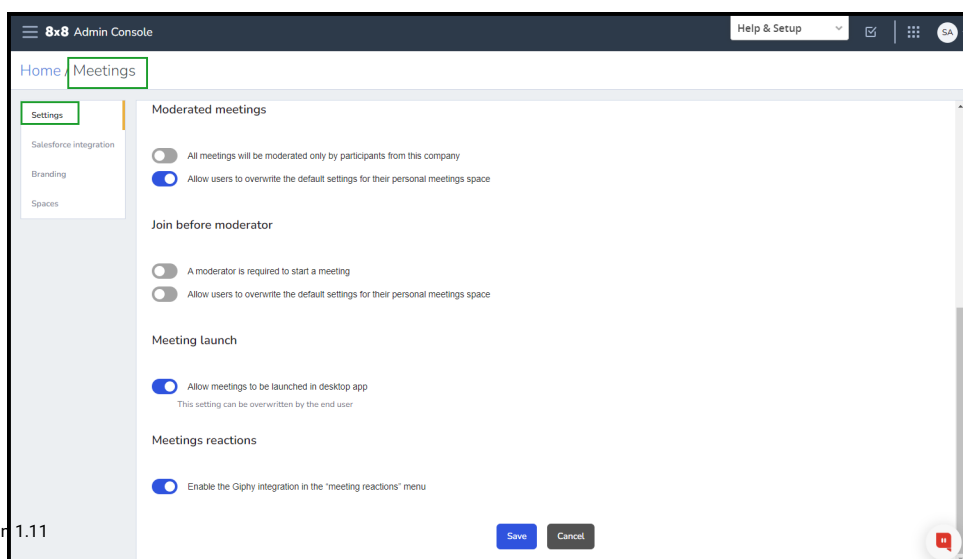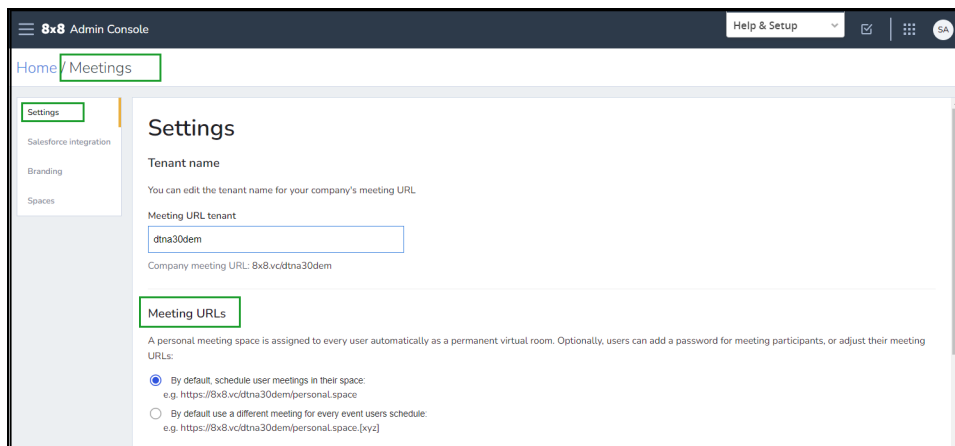
Need an in-room conferencing solution to bring remote participants into your office's meeting rooms? Now that you've set up 8x8 Meet for your organization, set up 8x8 Spaces for an enhanced in-room conferencing experience!

Meeting Branding

You can personalize your Meeting UI for your company by adding your company logo and link the logo to the company website, or you can set a custom link for the DID list. In addition, you can customize the meetings UI background.

To design your own Meeting UI:

1. From the main menu in the 8x8 Admin Console, go to **Meetings > Branding**.

2. In the **Branding** page, you can:

    ○ Click **Upload an image** to add your company logo.

    ○ Enter the link to the logo to company website and click **Save**.

    ○ Enter a custom link for the DID list and click **Save**.

3. Under **Customize the meetings UI background**, you can choose from the available colors or you can upload your own background image.

> **Note**: Click the **Meeting UI preview** image to enlarge it.
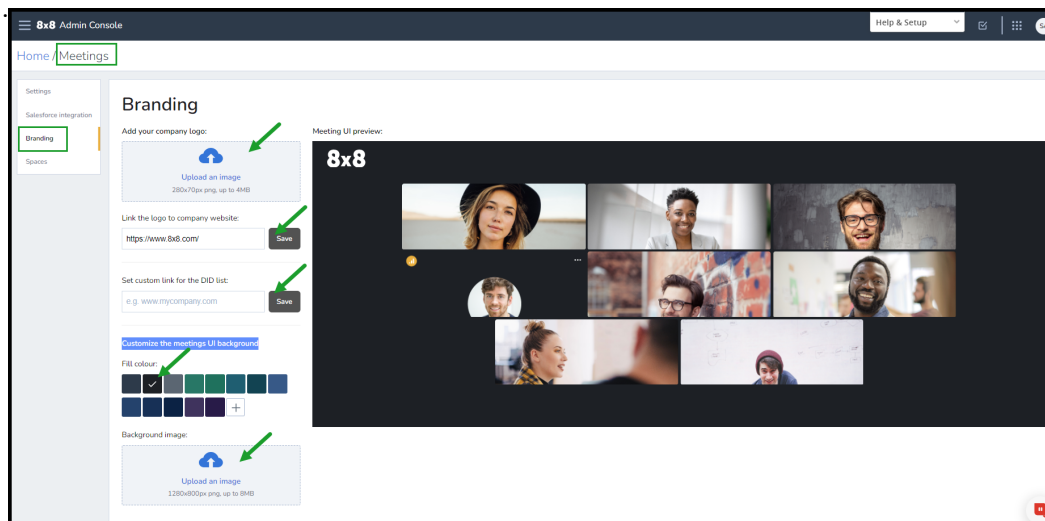
Salesforce integration with 8x8 Work

8x8 Work integration with Salesforce enables you to link your recent 8x8 meetings with Salesforce object records, allowing you to better track your progress with customers you interact with in 8x8 Meet.

> **Note**: This integration is available to 8x8 Work users whose organizations are X Series or Virtual Office Editions customers.
> For details on 8x8 Meet features available to different user types, click here.

To enable Salesforce integration with 8x8 Work:

1. From the main menu in 8x8 Admin Console, go to **Meetings >Salesforce integration**.

2. In the **Salesforce integration** page, switch the **Enable Salesforce integration with 8x8 Work** toggle On to allow the integration. Otherwise, switch the toggle Off.

3. Under **Salesforce login settings**, add a custom domain for Salesforce login.

4. Click **Save** .

> **Note**: For details about how to install 8x8 Meetings in Salesforce app, click How to install. To learn more about 8x8 Work for Desktop app, click User Manual.
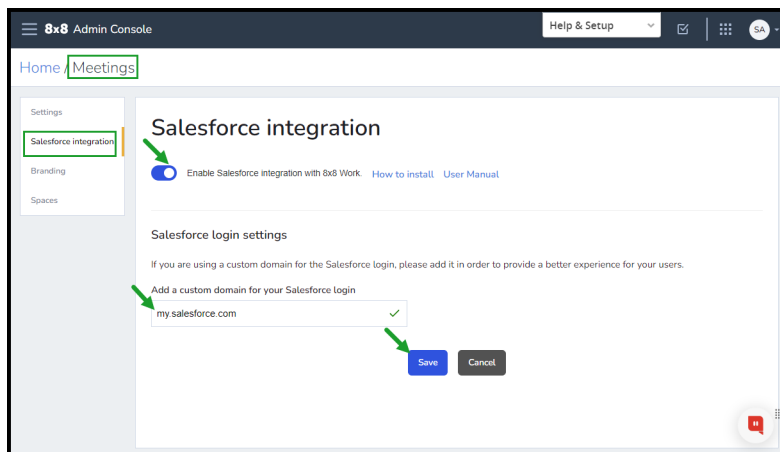
[A Meetings Standalone-friendly version of this topic is also part of the 8x8 Video Meetings web help; if any changes are made here, they must also be made in project VirtualOffice.]

Set up 8x8 Spaces

As an administrator, you can set up a conference room with an in-room conferencing system, and then further enhance the conference room with 8x8 Spaces to empower users with a robust in-meeting experience as well as offer an instant solution for collaboration!

Once you have a room that supports an in-room system, you can pair a conference room computer with a supported tablet that has the 8x8 Spaces app installed. Once you pair the room computer and the tablet, the tablet is used as an in-room controller by people in the conference room to join meetings via 8x8 Spaces.

To fully set up 8x8 Spaces, you must:

- **Step 1A**: Create 8x8 Spaces to associate with physical conference rooms.
- **Step 1B**: Add a new calendar to 8x8 Spaces.
- **Step 2**: Set up hardware for 8x8 Spaces.
- **Step 3**: Install the 8x8 Spaces app on the in-room controller.
- **Step 4**: Pair an in-room controller with a conference room computer.

Step 1A: Create 8x8 Spaces

1. As a 8x8 Work administrator, log in to 8x8 Work 8x8 Admin Console.

2. From the main menu in 8x8 Admin Console, go to **Meetings > Spaces** to open your list of meeting rooms.

> **Note:** The **Spaces** option is only accessible once your organization is fully enabled for 8x8 Meet; if your organization is fully or partially using the classic Virtual Office Meetings experience instead, you cannot access your list of meeting spaces.

3. In the list of meeting spaces, click **Add new space**.
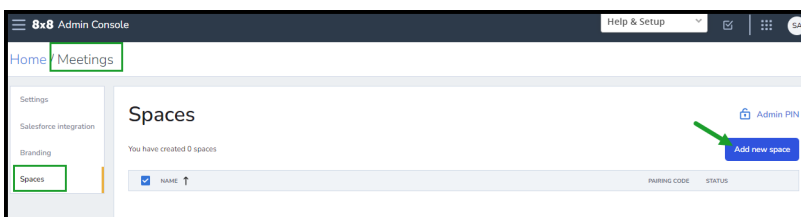
4. In the space creation screen:

- Connect the new space to the calendar used by your organization. The first time you create a space, you must add the desired calendar.

- Select the calendar resource that corresponds to the space; the calendar resource shows up to users when they schedule a meeting with the conference room.
For details on how to set up calendar resources, refer to this 8x8 Support article or to the documentation of the relevant calendar app.

- Enter the name of the space; the space name shows up as a label on the in-room television and controller.

- Enter the location of the space; the space location shows up as a label on the in-room television and controller.

5. Save your changes to set up the space and display it in the list of meeting spaces.

Note: In order for 8x8 to be able to access calendar resources and/or spaces, your email account must have resources enabled by your vendor. Some vendors require premium subscription to provide calendar resources. Please contact your vendor for assistance.

Step 1B: Add a new calendar to 8x8 Spaces

1. While creating a new meeting room, click **Add new calendar** next to **Connect calendar** to bring up a calendar selection prompt.

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2. At the prompt, select the type of calendar your organization uses from the supported calendar types, such as Office 365 or Google Calendar.

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8x8 Meeting Rooms is using Cronofy to securely access your calendar so it can see your schedule.

It will also be able to see the schedule of all calendars you have access to.

Powered by Cronofy

3. Once you select the desired calendar, confirm and log in to the calendar account that hosts the calendar resources that correspond to your organization's physical conference rooms, and confirm.

8x8

8x8

8x8 Meeting Rooms is using Cronofy to securely access your calendar so it can see your schedule.

It will also be able to see the schedule of all calendars you have access to.

 iCloud

Apple ID

> Apple account email

App-specific password

> eg. XXXX-XXXX-XXXX-XXXX

You will need to create an app-specific password to link your account.

☐ **I agree to the Cronofy Terms of Service and Privacy Policy**

Link Apple Account

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The calendar account you log in to is now available to associate with 8x8 Spaces that you create.

Step 2: Set up hardware for 8x8 Spaces

In your conference room, be sure to set up the following audio and video hardware to function with 8x8 Spaces:

- **TV/display monitor**: Show remote and local meeting content.
- **Room computer**: Load the Chrome-based 8x8 Spaces application, and connect all hardware.
- **Camera**: Show in-room meeting attendees to meeting participants outside of the room.
- **Speaker**: Play remote attendee audio (a separate speaker device is optional, as a speaker may be built into the display monitor).
- **Microphone**: Receive audio from room participants (a separate microphone device is optional, as a microphone may be built into the display monitor).
- **Tablet device (AKA in-room controller)**: Start meetings, dial in to meetings, provide wireless in-room content sharing, and control the in-room display.
- **Screen share adapter**: Allows in-room attendees to share their computer screen via a physical cable.

Component	Required or optional	Minimum requirement
TV or display monitor	Required	• 1080p resolution • HDMI USB-C connectivity
Room computer	Required	Mac mini Quad-core with 8GB memory
Camera	Required (may be bundled)	• 720p resolution • USB 3 or USB-C connectivity
Speaker(s)	Required (may be bundled)	3.5mm audio, or USB 3 or USB-C connectivity
Microphone(s)	Required (may be bundled)	USB 3 or USB-C connectivity
Tablet device	Required	• iPad running iOS 12 or higher • Android tablet running Android 9 or higher
Screen share adapter	Recommended	• HDMI input • USB 3 or USB-C output

Step 3: Install the 8x8 Spaces app on the in-room controller

1. Once a conference room has been set up for 8x8 Spaces, the conference room computer must be paired with a tablet that has the 8x8 Spaces app installed.
   This tablet is to be connected to a power source and left in the conference room as an in-room controller.
   On a tablet (AKA in-room controller) that meets hardware requirements for 8x8 Spaces, open the App Store.

2. Go to the 8x8 Spaces download page, and install the appropriate apps for the conference room computer ("Desktop") and in-room controller ("Mobile").
   Once the app is installed on the in-room controller, you are ready to pair the in-room controller with a conference room computer.

Step 4: Pair an in-room controller with a conference room computer

1. In a conference room that has been set up for 8x8 Spaces, bring an in-room controller with the 8x8 Spaces app to pair with the conference room computer.

2. On the room computer, open the **8x8 Meeting Spaces** app you downloaded in Step 3. Previously, you had to rely on a web-based setup method, but this is no longer recommended.

   a. At the prompt in the app on the room computer, enter the pairing code assigned to the conference room; find the pairing code in 8x8 Work 8x8 Admin Console under **Home > Meetings > Spaces**

b. Confirm the pairing code you entered to see a device setup screen where you can confirm the hardware in the conference room. You can preview audio and video quality for the selected devices before you confirm.
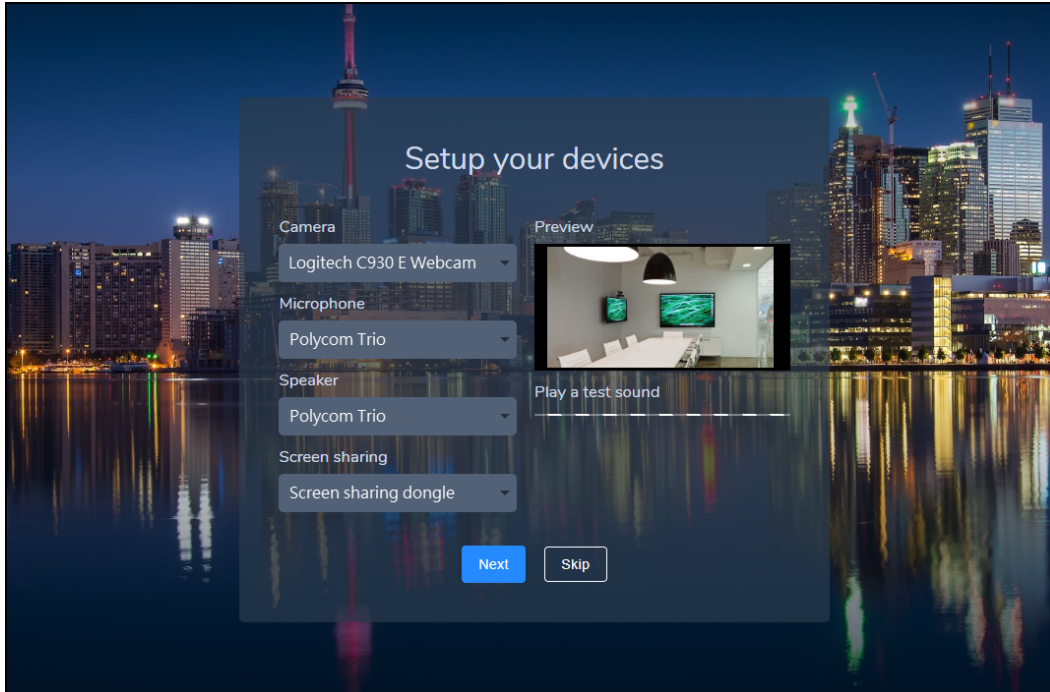
c. Click **Next** to bring up a pairing code for the in-room controller.

3. On the in-room controller, open the **Meeting Spaces** app.

   a. In the app, go past the starting screen to open a pairing code prompt.

   b. At the prompt in the app, enter the pairing code shown on the television connected to the room computer, and confirm.

   > **Note:** The code should be 8 digits long. If your code is 6 digits instead, press the **Enter** key twice to skip the last two digits.
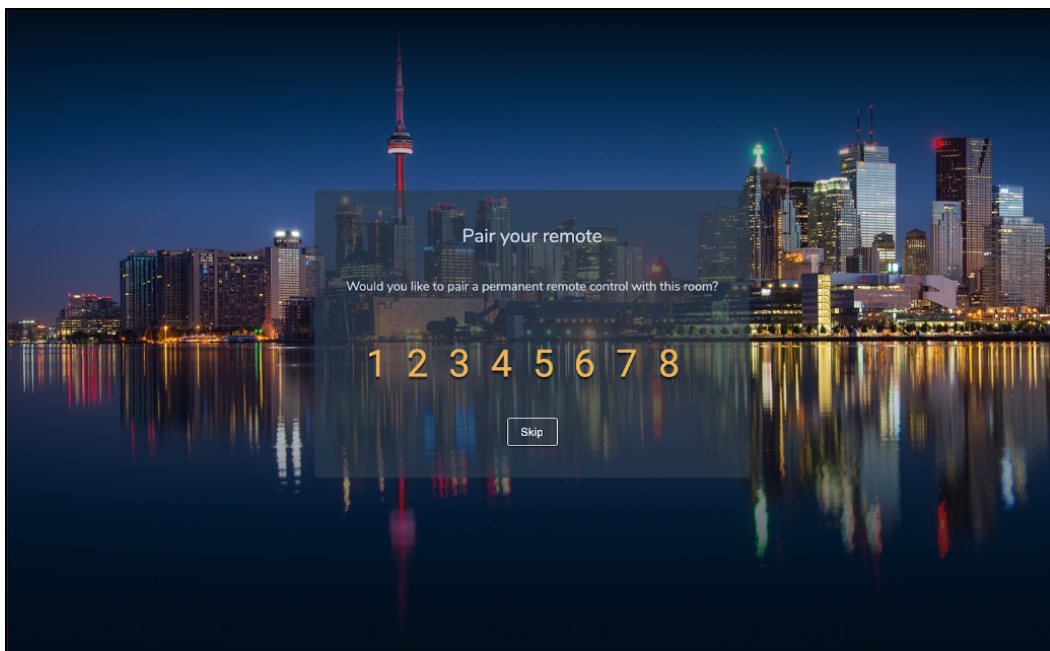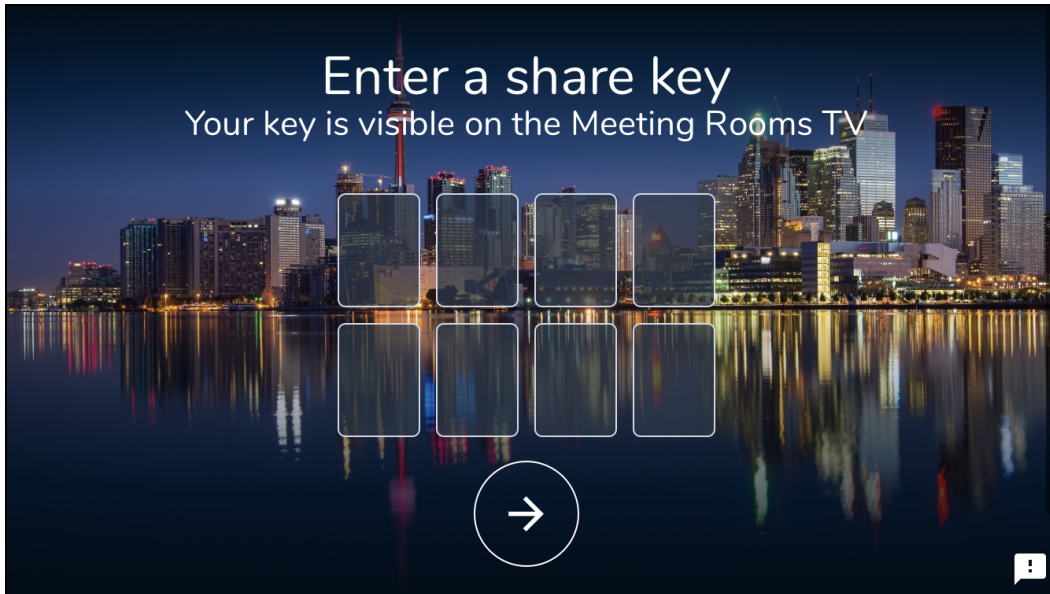
4. On the room computer, confirm the pairing to finish assigning the in-room controller for 8x8 Spaces.

5. To prevent navigating away from the 8x8 Spaces app, add a PIN code to the meeting room the in-room controller is paired with, or lock the home and power buttons of the in-room controller.
   If you want to prevent the in-room controller from going to sleep while the app is open, open the device settings

and:

- On an iOS device, go to **Accessibility > Guided Access**, and enable **Mirror Display Auto-Lock**.
- On an Android device, go to the device-appropriate setting to prevent the tablet from locking automatically.

Create users in bulk

Instead of creating contacts or users individually, you can create them in bulk using the bulk upload feature in 8x8 Admin Console. 8x8 Admin Console provides a CSV template containing a minimum or all configurable fields. Each user is specified in one row in the CSV file. You can upload as many users as you desire. The bulk processing tool validates the data on each row and processes the information to create users. You can add and remove the fields from the CSV file. If the system detects missing data or errors, the detailed error report provides specific information for you to fix. Please note that the system does not move to the next step or processing until all rows pass the validation. When the validation is complete, the system moves to the processing stage. The final report includes only the information about the processing results. This indicates that the validation has been successful.

To create users in bulk:

1. Go to **Home > Users**, and click **Bulk upload**.

2. In Bulk upload window, click **Download .CSV template**.

3. In the template, select the desired columns to upload, and click **Download template**.
    The basic fields are pre-selected for you. {mf--are these the minimum required fields?}

4. Open the template file, add your user data in the Excel sheet and **Save**.
    Gather the guidelines from Bulk User Upload Template Fields.

5. In the bulk upload window, click **Drag and drop your .csv or click to browse**.

6. Upload the CSV file you just saved and click **Validate**.

    The rows are validated top to bottom. A green bar flashes in the header bar if the validation process goes well.

7. After validation, click **Bulk upload again**, upload your validated CSV file and click **Validate and Process**. The uploading process starts and the rows are processed. The new users appear in the **Users** page. You can check out the list of activities by clicking on the top header or by going to the **Tasks** page from the main menu.

> **Note:** You can choose to validate and process instead of validating only. However, all data must be valid before the system starts processing the rows. If there is an error in one row, the operation stops at validation without creating any users or contacts. {mf--is this a known issue or intended behavior?}
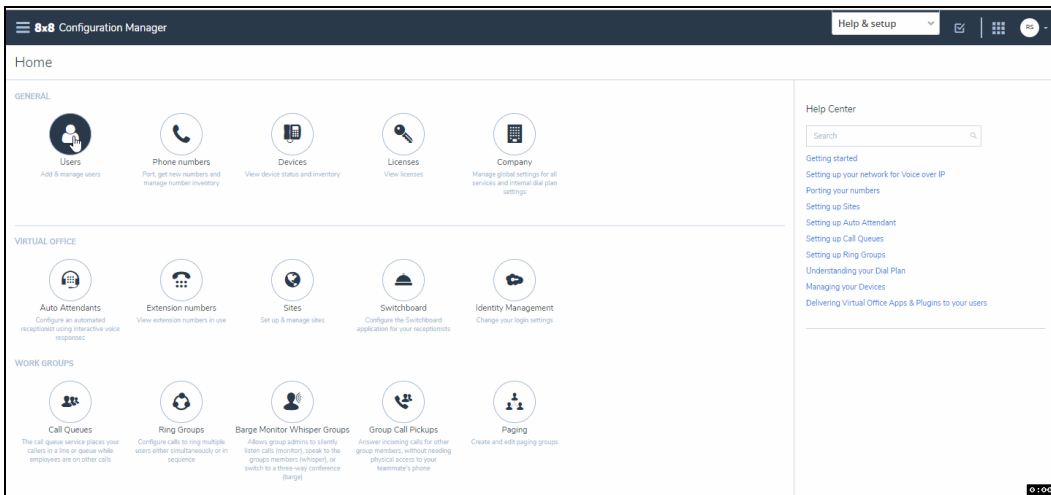
8. If the validation process detects any errors in the files, a red bar appears in the header indicating an error

   message. You can find the report by clicking on the top header, or by opening the **Tasks** page from the main

   menu.
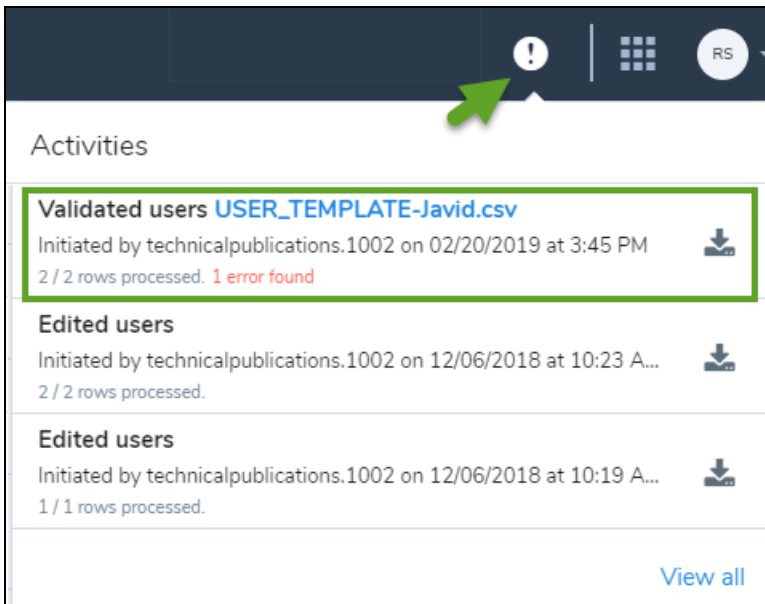
9. Download the report. If there is an error during validation, whether you choose validate & process or just validate,

   you will see the following additional columns in the report besides the user information you provided.

User Validate (Status & Details)	Description
User Validate Status	Indicates the success or the failure of the user data validation on every row.
User Validate Details	In case a row fails validation, it provides specific details about the problem.

If you choose to validate & process and the validation is complete, you will see the following additional columns in the report besides the user information you provided:

User Upload (Status & Details)	Description
User Upload Status	**RowSuccessfullyProcessed**: This row is processed. See the output columns for the actual results. **RowPartiallyProcessed**: This user is partially created but with some errors when configuring one or more specified properties. See UploadDetails for details. The user must be edited in 8x8 Admin Console to address the issues. {mf--what triggers this status? what is the example} **RowProcessingFailed**: The user is not created. See UploadDetails for explanation. Once corrected you can upload the row again. {mf--how is this row different from the first row (Row not processed) ?}
User Upload Details	Explains the upload status to help you identify the reason and the required correcting step.

> **Notes:**
> -You can create up to maximum 750 users in each CSV file upload. To add more users, save them in multiple CSV files. {mf--still correct?}
> -The large CSV bulk upload operation may time out after 10 minutes. Refresh the application to avoid losing the upload report. {mf--still correct?}

Add VCC users in bulk

If you are an 8x8 Contact Center customer on X Series, you will now be able to upload VCC users in bulk. In the user report you download or the template you upload, we have now added eight new columns to enable adding VCC users in bulk. Previously, you were limited to assigning a VCC license and defining the corresponding settings via the user interface per user. Now, you can add VCC licenses to users, set an extension number, add dedicated devices, select the agent to be included in the auto attendant, and more via the bulk upload template.

- The bulk upload settings mimic the settings available in the user interface
- The template does not offer a column to indicate the VCC dedicated extension. It is assumed automatically when a phone number and device are chosen.
- Extension numbers for agents are auto-generated if not provided.

To add VCC users in bulk:

1. Log into 8x8 Admin Console.
2. In the Bulk upload window, click **Download .CSV template**.
3. At the prompt, select the columns to download from the list.
4. To add VCC users, ensure to select the following columns:
   - **Contact Center Agent: license**
   - **Contact Center Agent: extension**
   - **Contact Center Agent: dedicated device model**
   - **Contact Center Agent: dedicated device MAC address**
   - **Contact Center Agent: dedicated phone number**
   - **Contact Center Agent: display in contact directory**
   - **Contact Center Agent: include in auto-attendant directory**

- **Contact Center Agent: send agent welcome email**

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5. Click **Download template**. The template file is automatically downloaded to your local disk.

6. Open the template using Microsoft Excel. Click here for template field descriptions.

7. Add valid data and save.

8. Go back to 8x8 Admin Console and in the bulk upload window, drag and drop your **.csv or click to browse.**

9. Upload the CSV file you just saved and click **Validate**.

   The rows are validated top to bottom. A green bar flashes in the header bar if the validation process goes well.

10. After validation, click **Bulk upload** again, upload your validated CSV file and click **Validate and Process**. The uploading process starts and the rows are processed. The new users appear in the Users page. You can check out the list of activities by clicking on the top header or by going to the Tasks page from the main menu.

Bulk user upload template fields

The following table lists the basic and advanced configuration fields (mandatory and non-mandatory) used to create users in bulk. Download the basic or advanced .CSV template, add data for your users and save. When you upload the new file to your VO-8x8 Admin Console, you see the new users you just created in the **Home > Users** page. You can find any user by searching with their name or extension number under **Home > Users**.

Field	Required/ Optional	Description	Notes
User.FirstName	R	First name	• Free text, minimum two characters. • Valid special characters: ., &, -, _, ' .
User.LastName	R	Family name or last name	• Free text, minimum two characters. • Valid special characters: ., &, -, _, ' .
User.Email	R	User's email	Must be a valid email address.
User.Title	O	User's job title such as Sales Representative or Executive Assistant.	• Free text • Appears in the contact directory as the title.
User.MobileNumber	O	User's mobile number including the country code.	• The user's personal contact number such as cell phone. This number appears in the contact directory as the personal telephone number.

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Field	Required/Optional	Description	Notes
			• Excel interprets **+** prefix as a formula operator. Do not include the **+** prefix, or replace it with 00. For example, use 14088001500 instead of +14088001500, or 00442070966000 instead of +442070966000.
User.Department	O	User's department such as Sales or Marketing.	Appears in the contact directory. If present, this username is assigned to the user. If absent, an username is generated.
User.UserName	O	A unique username. Use the user's work email or prefix with the company name to avoid duplications.	• Free text • Valid special characters: ., -, _, @ . • No spaces allowed • If no username is entered, a unique username is generated for this user in the format of CompanyName.FirstName.LastName. If there is a conflict with an existing username, a number is added at the end, such as CompanyName.FirstName.LastName1.
User.Voice.Number	O/R	Voice phone number to be assigned (with country code) to the user as a business telephone number.	• This field is optional if User.Licenses is absent, but required if User.Licenses is present. • If present it makes the User.Voice.PortNumber field mandatory. • If the number is claimed, copy and paste it from Phone Numbers page. If you are porting this number, start

Field	Required/ Optional	Description	Notes
			the porting process (pre-porting at this stage) and request a temporary number to use during the porting period. • Excel interprets + prefix as a formula operator. Do not include + as prefix. You can replace it with 00, instead. For example, use 14088001500 instead of +14088001500, or 00442070966000 instead of +442070966000. **Note:** If you are porting a number, in the upload report, you see a temporary number assigned to this user under **User.Voice.TemporaryNumber**, while waiting for the porting process. Use this number if you wish to forward your calls during the porting process.
User.Voice.PortNumber	O	Yes or No	• This field is optional if User.Voice.Number is absent, but required if User.Voice.Number is present. • **Y** if you are porting the number to 8x8, **N** if you are using a claimed number. If the number is claimed

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Field	Required/ Optional	Description	Notes
			(already exists in your inventory), copy and paste it from Phone Numbers page. If you are porting this number, start the porting process (pre-porting at this stage) and request a temporary number to use during the porting period. • If you don't specify a value, the default answer is No.
User.Voice.PortingBatch	O	The name of the porting batch this number is a part of.	• The name of the porting batch. This is only applicable to voice numbers that you are porting and provides you a convenient way to group together numbers that should port at the same time. • Free form text. • If you would like to port multiple numbers at the same time, group them in porting batches to construct the desired porting order (when initiating the porting request). Voice numbers and fax numbers can port in the same batch.
User.Voice.COSTemplate	O	The user's policy profile.	If left blank the default policy profile will be used.
User.Fax.Number	O	A telephone number including the country code used for the user's business fax number.	• If the user is entitled to internet fax (this capability is included in the license associated with the user) then assigning a fax number enables internet fax services for this user. • Excel interprets + prefix as a formula

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Field	Required/ Optional	Description	Notes
			operator. Do not include the + prefix, or replace it with 00. For example, use 14088001500 instead of +14088001500, or 00442070966000 instead of +442070966000. • Fax phone number to be assigned (with country code). Must be different from the Voice number. If present it will make the User.Fax.PortNumber field mandatory. **Note:** If you are porting a number, in the upload report, you see a temporary number assigned to this user under **User.Fax.TemporaryNumber**, while waiting for the porting process. Use this number if you wish to forward your faxes during the porting process.
User.Fax.PortNumber	O	Yes or No.	• This field is optional if User.Fax.Number is absent, but required if User.Fax.Number is present. • If you specify a fax phone number to be assigned you will have to specify where is this number from:

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Field	Required/ Optional	Description	Notes
			Y if you are porting the number to 8x8. **N** if you are using a claimed number - If the number is claimed (already exists in your inventory), copy and paste it from **Phone Numbers** page. If you are porting this number, start the porting process (pre-porting at this stage) and request a temporary number to use during the porting period. • If you do not specify a value, the default answer is **N**.
User.Fax.PortingBatch	O	Name of the porting batch.	• This is only applicable to fax numbers that you are porting and provides you a convenient way to group together numbers that should port at the same time. • Free form text • If you would like to port multiple numbers at the same time, by grouping them in porting batches you can easily construct the desired porting order (when initiating the porting request). Voice numbers and fax numbers can port in the same batch.
User.Licenses	O	A valid license name	• This field is optional if you add this user as a corporate contact with no actual 8x8 services, but required if you provide 8x8 services to this user. • Copy the license name from the License page in 8x8 Admin Console

Field	Required/ Optional	Description	Notes
			such as 8x8 Work Virtual Office Ultimate- VOSVC0203-VO Zone 4 - US. • If you assign a license to this user, it determine what capabilities the user has.
User.Voice.Extension	O	Valid extension number within the company.	• Digits only. • Ideally it should follow the company's internal dial plan (for example, 6 digits if you have opted for 6 digit extensions) but the system accepts extensions of any lengths as long as they are unique. • If assigning voice services, this extension is used as the user's extension. If creating a user as a contact then this extension is used as the contacts external extension information. • If assigning voice services to the user, a unique extension is generated. If the extension in the CSV is invalid then a unique and valid extension is used instead (check the output report to see what extension is assigned to this row.)
User.Voice.Device.Model	O	The user's voice device (desktop)	• Copy the device model, such as Polycom VVX 401, from the Devices page in 8x8 Admin Console. • No deskphone is assigned to the user. The user still receives softphone access if allowed by the

Field	Required/ Optional	Description	Notes
			company policy. **Note:** No DECT phones or ATA devices can be assigned via CSV upload.
User.Voice.Device.Mac	O	A unique and valid MAC address	• Copy the device's MAC • Enter the device's MAC for remote activation. • If the device is hardphone and MAC is present - activate the device via MAC address
User.Site	R	Copy the user's site name from the **Sites** page.	• Free text • Copy the site name from the Sites page in 8x8 Admin Console such as San Jose HQ • A site is for both users and contacts . Contacts are users without any services.
User.FederationID	O	The identity of the user in the external SSO/SAML provider	• Free text • The user's SAML identity • If your business uses the third-party authentication such as Federation ID, you can associate the third-party identity to the 8x8 user. Copy the user's identity, usually an email address found in the SSO directory to this field.
User.GoogleID	O	The identity of the user in the Google system.	• Free text • If your business uses the third-party authentication such as Google SSO,

Field	Required/ Optional	Description	Notes
			you can associate a Google identity to the 8x8 user. Copy the user's identity, usually an email address found in the SSO directory to this field.
User.CostCenter	O	Cost center to which this user belongs	• Free text • Copy your cost center's name (such as San Jose Cost Center) as identified on the order. • Associate a specific cost center to this user for billing purposes. Services for this user goes to that specific cost center.
SendWelcomeEmail	O	Yes or No	**Y** means that a welcome email is sent to this user, but **N** means that no welcome email will be sent.
User.Locale	O	The user's language controls voice prompts, email notification language, and deskphone UI language.	• If specified, it takes one of the following values: da-DK, de-DE, en-AU, en-GB, en-US, es-ES, fi-FI, fr-CA, fr-FR, it-IT, ja-JP, nl-BE, nl-NL, no-NO, pl-PL, pt-BR, pt-PT, sv-SE, zh-CN. • If no value is specified, it defaults to the site's language. • It controls voice prompts, email notification language, and deskphone UI language as a combination of region codes https://en.wikipedia.org/wiki/ISO_3166-2 and language codes https://en.wikipedia.org/wiki/List_of_ISO_639-1_codes.

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Field	Required/ Optional	Description	Notes
User.Voice.VoiceMail.Password	O	The voicemail access PIN	• Must be six digits long and non sequential, for example, 123456 is not a valid password. • If not specified, the user is required to define the access pin when accessing the voicemail service (555).
User.Voice.HideFromAutoAttendant	O	Yes or No Default is Yes	• **Y** means this user is accessible in the Auto Attendant's Dial by Name, Dial by Extension and Company Directory flows. • If not specified, defaults to **Y**.
User.Voice.EnabledSRTP	O	Yes or No Default is Yes	• **Y** specifies that the Secure Real Time Protocol is used to encrypt voice communication for deskphones. • If not specified, defaults to **Y**.
User.SwitchBoard	O	Yes or No Defaults to No	• **Y** specifies that this user is a Switchboard admin and the user's license includes the Switchboard capability. • If not specified, defaults to **N**
User.DisplayAsContact	O	Yes or No	• **Y** specifies that this user is visible in the company's contact directory and accessible via the 8x8 Work for Desktop and 8x8 Work for Mobile. • If not specified, defaults to **Y**.
User.TimeZoneId	O	The user's timezone	• It can be any of the timezones defined in the timezone specification. See https://en.wikipedia.org/wiki/List_

Field	Required/ Optional	Description	Notes
			of_tz_database_time_zones. • If not specified, it defaults to user site's timezone.
User.DirectoryScope	O	The user's contact directory scope	• Defaults to customer. • The user's directory scope can be one the following values: CUSTOMER (the user can view all contacts in the company), PBX (the user can view all contacts in the same pbx), or BRANCH (the user can view all contacts in the same site). • The user's contact directory scope shows what contacts the user can see from the directory. • If not specified, it defaults to CUSTOMER.{mf--customer, how?}
User.Voice.Country	O	The country of the emergency address.	• The country of the emergency address can have be of the following values: AI, AR, AT, AU, BB, BE, BG, BH, BR, BS, CA, CH, CI, CL, CM, CN, CO, CR, CY, CY, CZ, DE, DK, DO, EE, ES, FI, FJ, FR, GB, GP, GR, HK, HR, HU, ID, IE, IL, IN, IS, IT, JM, JP, KN, LC, LI, LT, LU, LV, MC, MM, MN, MQ, MT, MX, MY, NL, NO, NZ, PA, PE, PH, PL, PM, PR, PT, PY, RO, RS, RU, SE, SG, SI, SK, TC, TH, TR, TT, TW, US, VC, VG, VI, VN, YT, ZA. • If not specified, it defaults to the user site's country.

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Field	Required/ Optional	Description	Notes
			• The emergency address country in ISO format. See https://en.wikipedia.org/wiki/ISO_3166-2
User.Voice.Address	O	The freeform part of the emergency address.	• If not specified, it defaults to the site's address. • It includes city, zip code or postal number, for example, 2125 O'Nel Dr. San Jose, CA 95131.
User.Voice.EmergencyCallSupport	O	Yes or No Defaults to Yes	• Enables emergency services for this user. • Y specifies that this user and phone number is registered for emergency services (911 or 112 calls). • If not specified, it defaults to Yes.
User.Voice.DialPlanRuleSetName	O	The user's external calling plan.	• The user's external calling plan can have one of the following values INTERNATIONAL (allows the user to make domestic and international calls), DOMESTIC (allows the user to make domestic calls only) or EMERGENCYONLY (allows the user to make only emergency calls). • If not specified, it defaults to INTERNATIONAL.
User.Voice.DialPlanName	O	The user's calling country	• The user's calling country can have one of the following values: AGONP (Angola), ARENP (United Arab Emirates), ARGNP (Argentina), AUSTNP (Australia), AUSTRIANP

Field	Required/ Optional	Description	Notes
			(Austria), BGRNP (Bulgaria), BHRNP (Bahrain), BLGMNP (Belgium), BRAZILNP (Brazil), CHLNP (Chile), CHNNP (China), CLMBANP (Columbia), CRINP (Costa Rica), CZENP (Czech Republic), DNKNP (Denmark), FINLNDNP (Finland), FRANCENP (France), GERNP (Germany), GRCNP (Greece), HGRYNP (Hungary), HKNP (HongKong), HRVNP (Crotia), IDNNP (Indonesia), INDNP (India), IRELANDNP (Ireland), ISRAELNP (Israel), ITALYNP (Italy), JAPANNP (Japan), KENNP (Kenya), KORNP (Korea), LTUNP (Latvia), LUXNP (Luxembourg), MLYNP (Malyasia), MXNP (Mexico), NANP (North America), NORNP (Norway), NTHRLNDNP (Netherlands), NZLNP (Newzeland), PERNP (Peru), PHNP (Philippines), PLNDNP (Poland), PRTNP (Portugal), RMNNP (Romania), RUSNP (Russia), SINGNP (Singapore), SPNNP (Spain), SRILANKNP (Sri Lanka), STHAFNP (South Africa), SWEDENNP (Sweden), SWITZNP (Switzerland), THANP (Thailand), TRKYNP (Turkey), TWNNP (Taiwan), UKNP (United Kingdom), UKRNP (Ukraine). • If not specified, defaults to the site's

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Field	Required/ Optional	Description	Notes
			calling country.
User.Voice.HotDesk	O	Yes or No	• **Y** specifies that hotdesking is enabled for this user's device. • If not specified, it defaults to **N**.
User.Voice.VoiceMail.Notification	O	The voicemail notification setting	The voicemail notification setting can have one of the following values: DISABLE (notification is disabled), ATTACH_DELETE_ORIG (attach a copy of the voicemail to the email and delete the original), NOTIFY_ONLY (notify the user that a voicemail was received without the voicemail attachment), ATTACH_ONLY (attach a copy of the voicemail to the email).
User.Voice.VoiceMail.Email	O	The user's email for voicemail notifications.	• The user's email for voicemail notification must be a valid email address. • It can have one of the following values: OFF (call recording has been disabled for the user's extension), ALWAYS (record all calls for the given user's extension), ON_DEMAND (only record calls on demand for the given user's extension). • If not specified, it defaults to ON_DEMAND.
User.Voice.Recording.Mode {mf--added this entry. pls confirm}	O	The user's call recording setting.	Defaults to ON_DEMAND. It can be one of the following settings: • Off: Call recording has been disabled for the user's extension.

Field	Required/ Optional	Description	Notes
			• Always: Record all calls for the given user's extension. • On-demand: Only record calls on demand for the given user's extension.
User.Voice.BlockCallerId	O	Yes or No	• **Y** specifies that the external calls made by the user does not include any information about the user. • If not specified, it defaults to **N**.
User.Voice.MOH	O	Used for Music on hold	• **Y** specifies that the external calls made by the user does not include any information about the user. • If not specified, it defaults to N. • Copy audio file name from the 8x8 Admin Console's audio management dialog, such as audio with note.
User.Fax.ReceiveFaxEmailOption	O	The fax received notification setting.	• The fax notification can have one of the following values: LINK_AND_ ATTACHMENT (attach a copy of the fax and also embed a link to the document), ATTACHMENT_ONLY (attach a copy of the fax document only), LINK_ONLY (embed a link to the fax document in the notification), DISABLE_NOTIFICATION (notification is disabled). • If not specified, it defaults to DISABLE_NOTIFICATION.
User.Fax.Email	O	The user's email for fax received and sent notifications.	It must be a valid email address.

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Field	Required/Optional	Description	Notes
User.Voice.ShowInboundCallerId	O	Yes or No	• **Y** specifies that when dialing inside the company the user's identity must be visible. • If not specified, it defaults to **Y**.
User.Fax.SendFaxEmailOption	O	Send fax notification setting	• Send fax notification setting can have one of the following values: LINK_AND_ATTACHMENT (attach a copy of the fax and also embed a link to the document), ATTACHMENT_ONLY (attach a copy of the fax document only), LINK_ONLY (embed a link to the fax document in the notification), DISABLE_NOTIFICATION (notification is disabled). • If not specified, it defaults to DISABLE_NOTIFICATION.
User.Voice.ANI	O	A telephone number including the country code used as the user's external caller ID.	• Must be a number that already exists in your number pool (user's own number, mainline number or shared number). • Copy the number from the Phone Numbers page. For example, use the mainline number as external identity when calling outside the company.
User.Voice.ExternalCallerName	O	The name used for the external calling number (15 characters long). If the external calling number is a shared number such as a	15 standard characters

Field	Required/ Optional	Description	Notes
		mainline number, then this is not needed.	
SendWelcomeEmail	O	Yes or No	**Y** means that a welcome email is sent to this user. **N** means that no welcome email will be sent. - The default is **Y**.
Site.ReceptionistExtension	O	Extension number to route to when reaches 0 dialing.	- The target extension for 0 dial out (if 0 dial out is enabled). - Must be an extension already existing in the system.
VCC USER FIELDS			
User.Vcc.License Contact Center Agent: license	O	License for contact center agent	Copy license description from the license page in Admin Console. For example "X Series X8 (VCC)-VCCS0247-04"
User.Vcc.Extension Contact Center Agent: extension	O	Agent extension number used within the contact center application. If not provided, this will be auto-generated if a contact center agent license is specified.	Example: 1001
User.Vcc.DeviceModel Contact Center Agent: dedicated device model	O	Device type to be used if this is a dedicated contact center agent extension.	Copy device description from 8x8 Admin Console

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Field	Required/ Optional	Description	Notes
User.Vcc.DeviceMac Contact Center Agent: dedicated device MAC address	O	The MAC address of the physical phone being used for a dedicated contact center agent extension.	
User.Vcc.Number Contact Center Agent: dedicated phone number	O	Phone number to be used for a dedicated contact center extension.	
User.Vcc.ShowInDirectory Contact Center Agent: display in contact directory	O	Y or N. Defaults to Y. If set to Y, this contact center agent's details will be shown to other users in the corporate directory.	
User.Vcc.IncludeInAutoAttendant Contact Center Agent: include in auto-attendant directory	O	Y or N. Defaults to Y. If set to Y, this contact center agent's details will be shown to other users in the corporate directory.	
User.Vcc.SendWelcomeEmail Contact Center Agent: send agent welcome email	O	Y or N. Default to N Sends agent welcome email if set to Y.	
User.ForwardingRules.NoAnswerTimeout	O	The number of seconds before a ringing call is diverted in the no answer	By default, it is set to 15 seconds.

Field	Required/ Optional	Description	Notes
		call forwarding rule. If this user is a contact center agent, please ensure this setting is longer than their agent interaction offer timeout setting.	

FAQ

Refer to the following frequently-asked questions for more information:

When assigning a number to a user you must specify if the number is existing in the 8x8 system or is being ported. If your answer yes, it places the number in pre-porting state and assigns a temporary number to it.

Yes, you can. When you copy and paste a number from the phone numbers in 8x8 Admin Console to the CSV, specify **Y** in the PortNumber column (either User.Voice.PortNumber or User.Fax.PortNumber) depending on what you need the number for.

Send feedback from the 8x8 Admin Console application and include your report file as an attachment. Our support team will analyze and provide feedback based on your exact system configuration.

Edit users in bulk

In bulk edit, you can modify the same property for many users at once. Change the user information such as language, address, time zone, or call recording settings for multiple selected users, review the changes before performing the bulk edit, or cancel the bulk user edit operation at any time. To edit users in bulk, go to the **Users** page and select multiple users before clicking **Bulk Edit**.

You can undo edits to the properties by going back in the review page. Review the summary of chosen edits and proceed to commit. After committing the desired edits, you can access a report detailing the task completion. To download and view the report, go to the Tasks page. The uploaded tasks are processed and listed on the **Tasks** page. You can access the list of tasks in progress with the ability to download the error report. Download the reports for more information and decipher the process updates.

To cancel an upload request that is in progress, simply cancel the request. The report indicates the number of rows processed and provides details.

To edit users in bulk:

1. From the **Users** page, select two or more users, then select **Bulk Edit**.

2. Select the user properties to edit and enter the new values.

   - If you are not modifying a certain property, the value remains the same. **Keep existing values** in one field indicates that this field will not be modified by the bulk edit operation.

   - If you would like to undo a change, just clear the checkbox associated with that field. This is true about all fields, regardless of their type such as free text, drop-down, toggle, or option select.

3. Click **Continue**.

4. Review the edited properties for the selected users, then click **Confirm Bulk Edit**.

   A messages confirms your edits. The selected users are updated with your latest changes. If there is any errors in the bulk user edit, a red bar appears in the header and a report is created in the Tasks page. Open the report by clicking on the top header, or by going to the **Home > Tasks**.

The lists of completed tasks are presented in the page. Click ⬇ next to each task to download the report.

The upload tasks are processed and listed on the Tasks page. You can access the list of tasks in progress with the ability to download the error report. Download the reports for more information and decipher the process updates.

> **Note:** When you edit users with varying privileges, such as license type during the bulk edit, the minimum common set of privileges is exposed. For example, if you are editing two different users with X2 and X4 licenses, only the properties corresponding to both licenses, in this case X2, appears for change.

Cancel bulk edit

To cancel a bulk edit upload in progress, simply cancel the bulk edit request. The tasks report indicates the number of rows processed and provides some details. In 8x8 Admin Console, go to **Home > Tasks** to see the detailed report.

Add 8x8 Contact Center users

Users in 8x8 Contact Center (VCC) are grouped into agents and administrators. Agents handle customer interactions channeled through the contact center while administrators configure the contact center's resources and behavior. 8x8 Contact Center supports regular agents and supervisors. Supervisors have additional abilities to monitor agent and queue performance.

- **Agents: You can create agents, assign phone number and devices, and set up basic and advanced features. Agents use 8x8 Agent Console to view and manage customer interactions.**
- **Administrators: An administrator can be a primary administrator with unrestricted access to all the configuration objects, or a secondary administrator with full or partial configuration rights. The primary administrator creates the user accounts and can assign secondary administrator rights.**

Features

- **User creation**: Add users individually or in bulk. To add users in bulk, download the basic or advanced template, and upload data. You can create users in bulk and save time.
- **Agents with dedicated extensions**: Contact center agents who must be dedicated to handling only the contact center calls, must be assigned with dedicated extensions. These agents are assigned with an 8x8 supported SIP phone which can handle only those calls routed via 8x8 Contact Center voice channels. With a dedicated extension, the extension and Direct-in-Dial (DID) numbers are permanently redirected to 8x8 Contact Center agent channels.The agents can serve multimedia channels (voice, chat, email).
- **Agents without dedicated extensions**: Add agents without dedicated extensions, and with a minimum account, to serve digital channels, such as chat and email, only.
- **Agent voice channels**: Phone numbers assigned to agents function as dedicated agent channels. Callers can reach agents directly via these channels.
- **Service channels**: All phone number assigned to 8x8 Contact Center function as service channels. You can edit a service channel, and enable or disable it in 8x8 Contact Center 8x8 Admin Console. An IVR script is linked to the service channel by default.

You can add agents in 8x8 Admin Console without dedicated extensions, and set up a minimum user account to serve digital channels.

To set up a minimum user account:

1. From the main menu in 8x8 Admin Console, go to **Users > + Create User**. It allows you to create individual users.

2. Enter the **Basic Information**, and select a service.

To create a contact, enter first name, last name, and email address, then continue to add the following fields as needed:

- **Username:** By default, the system recommends a username created from company name, first name, and last name, and notifies you if a duplicate exists. For example, John Smith of AcmeJets Corporation sees this username by default: AcmeJets.John.Smith. If you wish to create a different username, it must be unique and never used before.

- **Site:** Site is the location of your business. By default, your phone system is assigned to a site based on the service address provided. The emergency address and language fields are derived from the site. The site's country is the default address country in the user account. You can modify the above values if needed. See how to set up sites.

- **Language:** Language controls the language of the voice prompts, email notifications, and device display.

- **Time Zone:** Time zone is used for downloading call recordings, viewing call queues, and scheduling and running reports when logged in as the current administrator.

- **Contact Directory Scope**: Define whether the user can view contacts and other users in the same PBX, site, or the entire company. A company can have multiple phone systems, multiple sites, and many users. For example, AcmeJets company has two phone systems and three sites. You can

choose the user to be visible at the PBX level or at the site level.

- **Display contact in company directory:** You can hide users, rings groups, call queues, internal fax numbers, etc., from the public in the company's contact directory. If the display option is disabled, the name and number is no longer visible in contacts. To hide a user from the company's directory, go to **Home > Users > Basic information**. Click to disable the **Display contact in company directory**, and save the user.

Under Additional information, add job title, address, department, personal phone number, and custom fields if enabled.

- **Job title**: Enter the job title of the user.
- Department: Enter the department the user belongs to.
- **Personal contact number**: Enter the user's personal contact number such as home or mobile number. The personal contact number appears on the user's 8x8 Work for Desktop and 8x8 Work for Mobile. If you enable **Display contact in company directory** in the user profile, the user's personal contact number will also appear in the company directory. For details, see our FAQ content on how to add a mobile number.

- **Custom fields**: If custom fields are enabled, they are visible as Custom Field 1, Custom Field 2, and Custom Field 3. Learn more.

3. Select an appropriate license type for VCC users. The license type assigned to a user determines the scope of available phone features such as basic calling to advance contact center capabilities.

The license type for 8x8 Contact Centerservices varies based on the following:

- **For 8x8 Contact Center Editions users**: From the drop-down menu, select VCC Agent option to assign VCC agent privileges.

> **Note:** The VCC Agent service is shown in the drop-down only if you have available licenses in the pool. See Licenses for more information.

For Expert Connect services which allows your VCC agent to collaborate with experts in the team via 8x8 Unified Communication applications such as 8x8 Work for Desktop or 8x8 Work for Mobile, you must add an appropriate [[[Undefined variable 8x8VariablesSet.VOEditions]]] service bundle from the drop-down menu. See how to set up 8x8 Work Users.
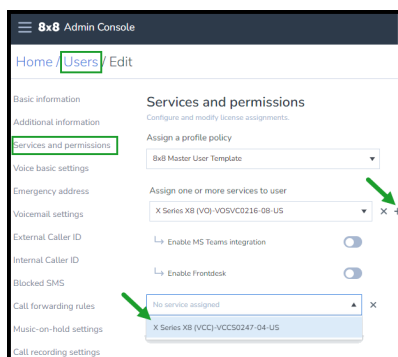
- **For X Series users**: Select an appropriate X series bundle which supports 8x8 Contact Centerservices.

> **Note**: Currently X6 or X7 or X8 service bundles support 8x8 Contact Center services. For Expert Connect capabilities, you must select X7 or X8.

4. Enter an **Extension Number**. Every user with the VCC Agent service must be assigned a VCC extension number. VCC extension number is a virtual number used to route calls and other interactions to the agent. You can enter a valid extension number or let the system suggest one. The length of extension number is determined by the dial plan set up in your phone system. Agents with an extension number can handle calls and other interactions routed via channels and queues. Additionally, they can place calls or receive calls from other users in the contact directory.

> **Note**: If you are an X Series customer, then the extension number settings are available under the **8x8 Contact Center Agent Settings** section.

5. Click to disable the **Display VCC contact in company directory** to hide 8x8 Contact Center user's presence in the contact directory. This option is enabled by default.

   A VO-VCC user with both 8x8 Work and 8x8 Contact Center licenses appears twice in the contact directory: once with 8x8 Work extension and once with 8x8 Contact Center extension. You can show both 8x8 Work and 8x8 Contact Center extension numbers, just one, or no extension numbers for the VO-VCC user in company contact

directory.
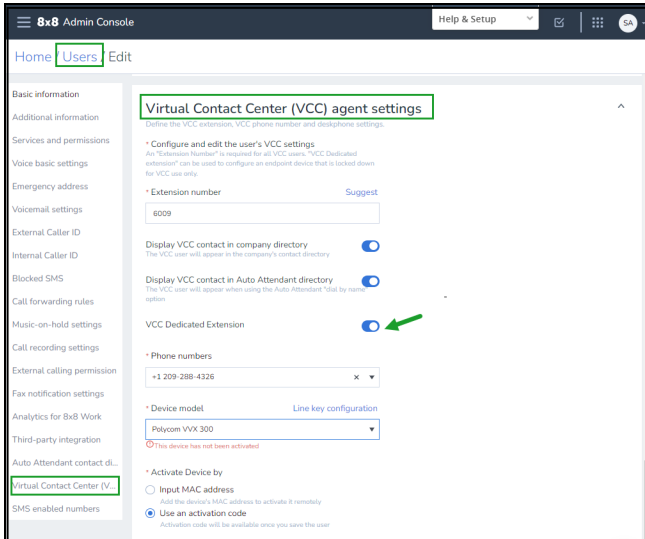
6. **Save** the user.

You can add agents in 8x8 Admin Console with dedicated extensions and define them to serve multimedia channels (voice, chat, email). When you assign VCC Agent services to a user in 8x8 Admin Console, every agent must get an extension number. For agents requiring a locked-down SIP phone, you must assign a dedicated extension.

To create a VCC agent with a dedicated extension:

1. From the main menu in 8x8 Admin Console, go to **Users > + Create User**. It allows you to create individual users.

2. Enter the **Basic Information**.

3. Select **VCC Agent** or an X series VCC service bundle, and enter an **Extension Number**. For a VCC agent service, a VCC extension number is mandatory. It is the private routing to the agent.

4. Enable **VCC Dedicated Extension**. VCC dedicated extension is used for agents who require a locked-down SIP phone.
    If your agent requires a locked-down SIP phone to handle 8x8 Contact Center

calls, then they must be dedicated to handling only the contact center calls, and you must assign them a dedicated extension. Agents with a dedicated extension are assigned with an 8x8 supported SIP phone which can handle only those calls routed via 8x8 Contact Center voice channels. With a dedicated extension, the extension and Direct-in-Dial (DID) numbers are permanently redirected to 8x8 Contact Center agent channels.

5. Select a **Phone Number**. Any claimed or ported phone number in 8x8 Admin Console can be used as a voice channel in 8x8 Contact Center. Assign these numbers to agents to convert these into VCC direct agent routing channels. When you log into 8x8 Contact Center 8x8 Admin Console, these assigned phone numbers show up as phone channels. See how to claim or port numbers.

> **Note:** For provisioning the public facing phone channels for 8x8 Contact Center, work with your 8x8 representative.

6. Select a **Device**. You can select a device based on your inventory and activate it to be able to use. See Manage Your Devices to view and assign devices. There are two ways to activate your device:

   ○ **Input MAC address**: You can activate the device remotely. Select **Input MAC address** and enter the unique alphanumeric identifier assigned to the device for the user. The device is activated remotely once the user is saved. A MAC address is ideal when there is no email associated with the user, such as lobby or computer lab phones.

   ○ **Use an Activation Code**: You can activate the device directly from the device. Select **Use an Activation Code**. Once the user is saved, an automatic code is generated by the system for the device, and associated with the user. The activation code is then sent to the user in their welcome email. The user can activate the device from their desk by calling the 8x8 registration service and entering the activation code.

   > **Important:** You must activate your device to save the user settings with a dedicated extension.

7. **Save** your settings. A confirmation message indicates if the user is created successfully. To create a user with unified communications, refer to the 8x8 Work 8x8 Admin Console help topic on Add users.

After assigning a user with VCC agent service, you need to configure agents to queues, define agent specific properties in the 8x8 Contact Center 8x8 Configuration Manager. You must log into 8x8 Contact Center 8x8 Configuration Manager application to complete these tasks. Agents created in 8x8 Admin Console show up in the **Users** tab in 8x8 Contact Center 8x8 Configuration Manager. The users are by default assigned to an agent group called **ungroup**. In the 8x8 Contact Center 8x8 Configuration Manager, you can create a new agent group to suit your business needs and assign the users.

Configuring 8x8 Contact Center users involves:

1. **Assigning roles and groups**
2. **Configuring user properties**
3. **Configuring phone settings**
4. **Assigning agents to queues**
5. **Granting supervisor rights**
6. **Granting Local CRM permissions**
7. **Defining the number of concurrent chats**

Assign 8x8 Contact Center administrators rights

Using 8x8 Role-based access control, you can now assign predefined roles to users which allows specific admin permissions. In 8x8 Admin Console, use the VCC Admin role to assign users with 8x8 Contact Center admin privileges. Users assigned with VCC Admin role do not have access to the 8x8 Work privileges.

Every 8x8 Contact Center has one primary administrator with privileges in all categories. This administrator's access can be edited or revoked by another administrator. You can grant administrator privileges to any existing user by

adding the user to the administrator's group. You do not need to assign this user with the 8x8 Contact Center Agent service.

To assign admin rights to users:

1. **From the main menu in 8x8 Admin Console, go to** ~~**Home > Roles and Permissions > Assignments**~~**.**
2. **On the top right hand corner, click Create Assignment.**
3. **Select a user to assign the VCC Admin role.**
4. **Select VCC Admin role and select the desired scope, and click** Save**.**
   When you promote a user to an admin, the user receives an automatic email notification informing the granting of administrator privileges. You can modify the name or change the properties of the primary administrator, but cannot delete it from the Company or User's page.

> **Note:** These administrators have privileges to configure both 8x8 Work and 8x8 Contact Center features.

To define granular role-based administration within 8x8 Contact Center, go to 8x8 Contact Center 8x8 Admin Console and define new roles with custom privileges within the tool. These privileges are only applicable to configuration functionality within the 8x8 Contact Center 8x8 Admin Console. For details on role-based administration, See 8x8 Contact Center Roles and administrators.

Know about 8x8 Contact Center-enabled PBX and sites

If your phone system includes 8x8 Contact Center services, it is important to understand the relationship between a VCC tenant and the phone system. A VCC tenant is linked to a single PBX only. The PBX to which a VCC tenant is linked to, is referred to as **VCC enabled** or **Contact Center**. Depending on your phone system configuration, you need to pay attention to the following:

- **Single-PBX Phone System**: If your phone system has a single PBX and it is linked to a VCC tenant, then the PBX is VCC enabled. When you create a site within the VCC-enabled PBX, the site is automatically VCC enabled. When you create a VCC user, assign the user to the VCC-enabled (Contact Center) site. All VCC users must be assigned to a VCC-enabled site.

- **Multi-PBX Phone System**: In a multi-PBX environment, creating sites and users must be planned ahead. In the **Company** page, you can view the VCC tenant name and the PBX name it is linked to. When you create a site which includes VCC users, you must ensure the site belongs to the VCC-enabled (Contact Center) PBX. While creating a VCC user, you must assign the user to a VCC-enabled site only. If you select a non VCC-enabled site, you will be disabled from assigning VCC services.

Create VCC-enabled sites and users

Creating VCC-enabled (Contact Center) sites and users involve the following steps:

1. Go to **Home** > **Company**> **Contact Centers**.
2. In the **Contact Centers** page, note down the PBX name that the VCC tenant is linked to.

Note: When creating a site that includes VCC users, you must ensure the site belongs to the VCC-enabled (Contact Center) PBX.

1. Go to **Home** > **Sites**.
2. Click **Create Site**.

3. If your phone system has multiple PBXs, under **Details**, in the **PBX** list, select the VCC-enabled PBX you gathered from the Company page in step 1.
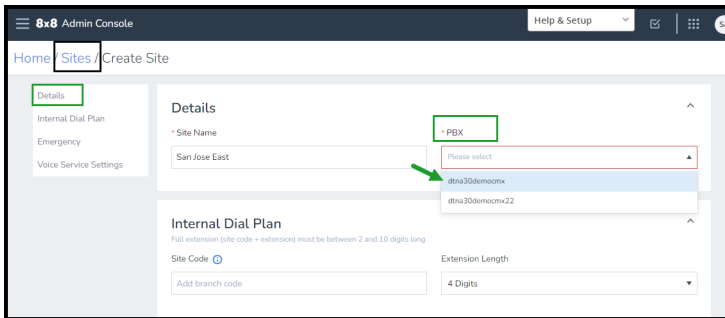
4. Enter the required site details and save.

Now this site is VCC-enabled (Contact Center) by default.

> **Note**: All sites linked to a VCC-enabled PBX are VCC enabled (Contact Center) by default.

> **Note**: Before you can assign VCC services to a user, you must first assign the user to a VCC-enabled site only. Otherwise, the **Services** list displays no VCC licenses.

1. Go to **Home** > **Users**.
2. Click **Create User**.

3. Under **Details**, the basic information, select a site that is marked as **Contact Center**.

4. Continue to fill in the required information and save the user.

> **Note**: All VCC users must be assigned to a VCC-enabled (Contact Center) site.

Set up 8x8 Contact Center service channels

A Service channel is a regular phone channel used by your customers to call your contact center. It is associated with a telephone number to process inbound phone interactions in a 8x8 Contact Center. You can assign a number to 8x8 Contact Center from within a 8x8 Work 8x8 Admin Console. You can further edit a service channel, and enable or disable it from within the 8x8 Contact Center 8x8 Admin Console. An IVR script is linked to the service channel by default. Service phone channels can only be added or removed from your 8x8 Contact Center tenant by a 8x8 Contact Center administrator. The representative coordinates the acquisition and routing of the phone number to the 8x8 platform that hosts your tenant. {mf--is this correct?}
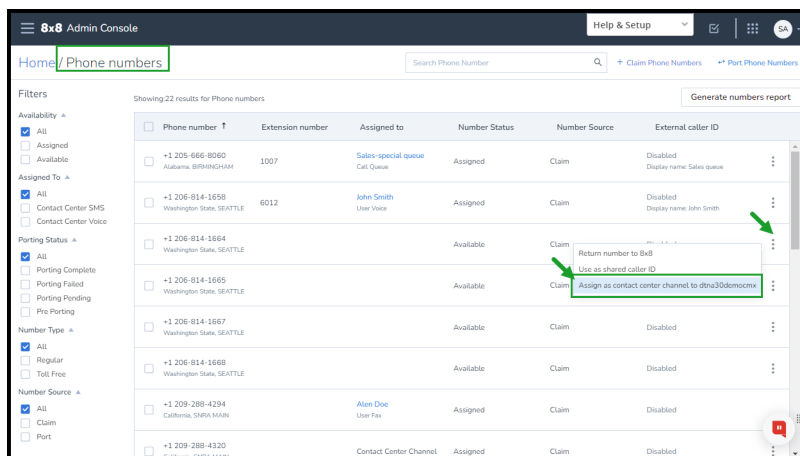
Go to 8x8 Contact Center Channels to assign an 8x8 number for use as a 8x8 Contact Center service channel. You must first claim or port numbers from 8x8 Work 8x8 Admin Console. See how to claim or port telephone numbers. To learn about VCC direct agent routing channels, see Creating VCC agents with dedicated extensions.

> **Note:** The first phone number that is assigned as a VCC channel is automatically set as the VCC Billing Telephony Number (BTN) and Called ID (CLID). Contact 8x8 Support team if you would like to make any changes.

To set up 8x8 Contact Center service channels:

1. Go to **Home > Phone Numbers** and claim or port a phone number.

2. Select the desired unassigned phone number, click **More** ⋮ > **Assign as contact center channel to ...**.

You can unassign a phone number by clicking **More** next to the desired contact center channel number, and click **Unassign from contact center**.
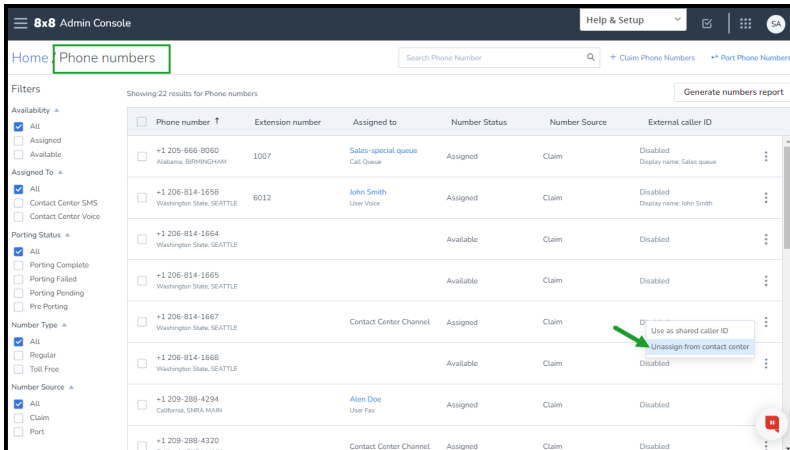
The assigned service channels appear in 8x8 Contact Center 8x8 Admin Console and under **Home > VCC Channels**. See our 8x8 Contact Center Administrator guide to see how you can Create and configure channels.

Add external contacts

8x8 Work administrators on X Series can now centrally maintain a directory of contacts that are external to their organization. These contacts are accessible to end-users in the contact directory of the following apps:

- 8x8 Work for Desktop
- 8x8 Work for Mobile
- 8x8 Frontdesk
- 8x8 Contact Center Agent Console

Limitations

- External contacts are not visible on the deskphone directory.
- During bulk upload of contacts, file size is limited to 10 MB (~ 40000 contacts) per upload.
- Custom labels on custom fields are not supported.

You can create an external contact one at a time or import them in bulk.

To create an external contact:

1. Go to **Home** >**Contacts**.
2. In the **Contacts** page, click **Create contact**.
3. Enter the basic contact information such as first name, last name, and phone number.
4. Enter additional information as necessary.
5. Click **Save**. An external contact is now successfully created. Go back to the Contacts page to view the newly added contact.

1. Go to **Home**>**Contacts**.

2. In the **Contacts** page, click **Bulk upload**.

3. If you already have an existing list of contacts in the CSV format, locate the file, drag and drop it.
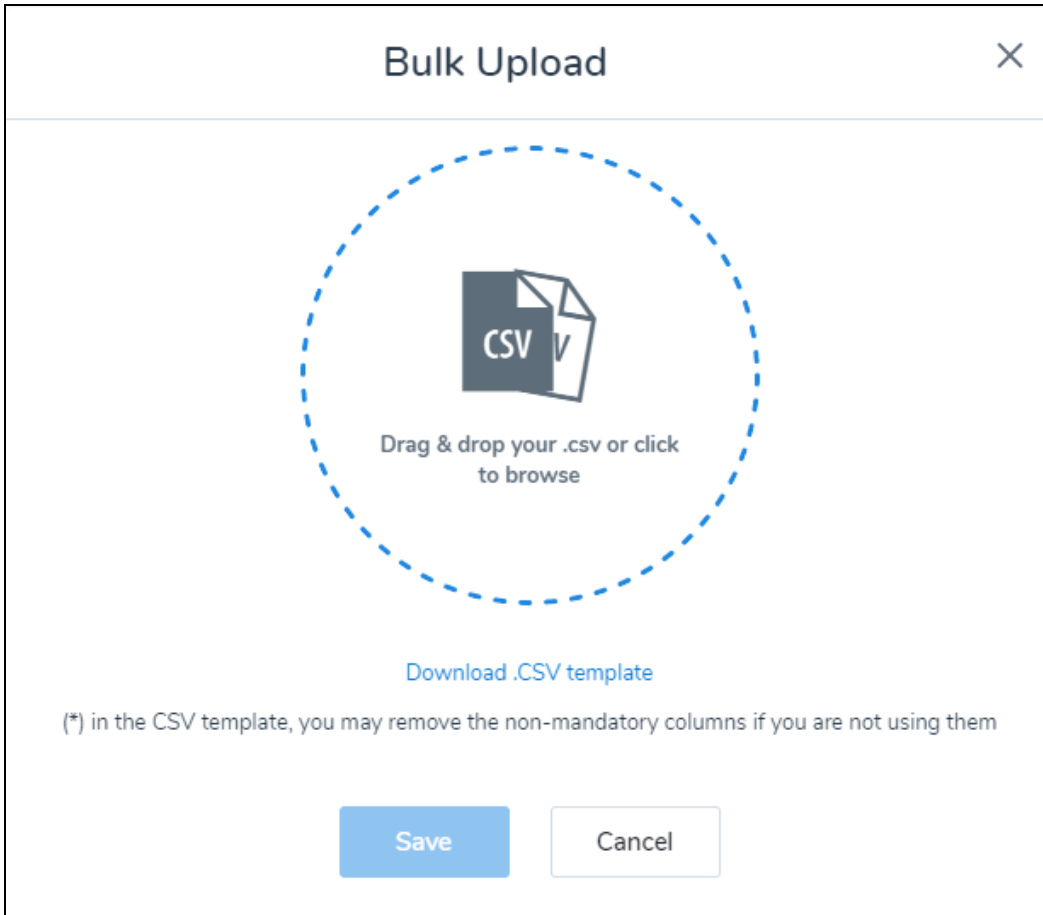
4. If you need to create a list of contacts:

   a. Download the template in CSV format.

   b. Open the template file in Excel, add contact information and save the file. Gather the guidelines from Bulk Contact Upload Template Fields.

   c. Drag and drop this file to the bulk upload page.

5. Click **Save**

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The processing time may vary depending on the file size. While the upload is in progress, check out the status in the header under **Tasks**.
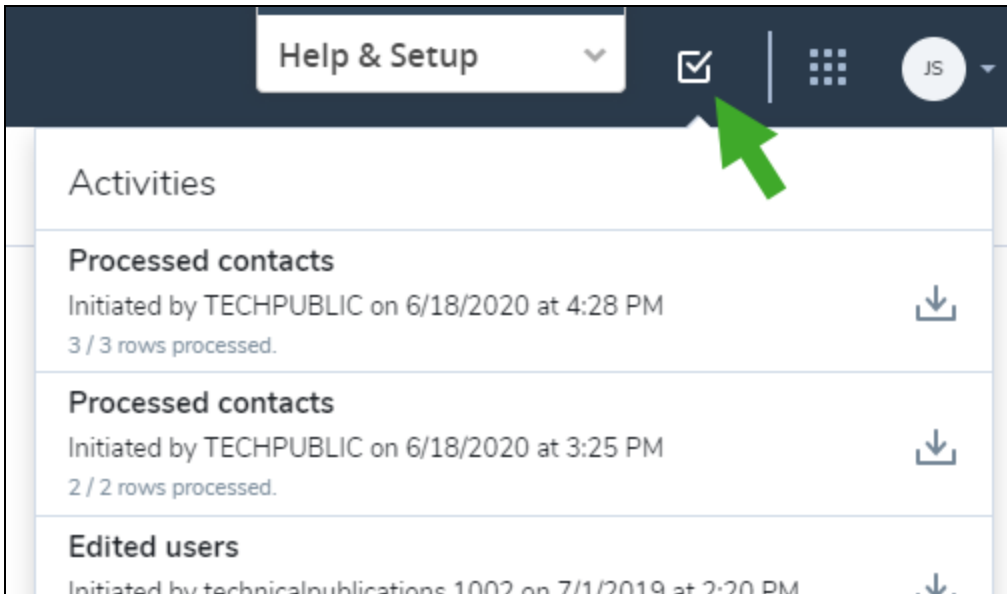
6. Once the upload is complete, you will be notified with a message.
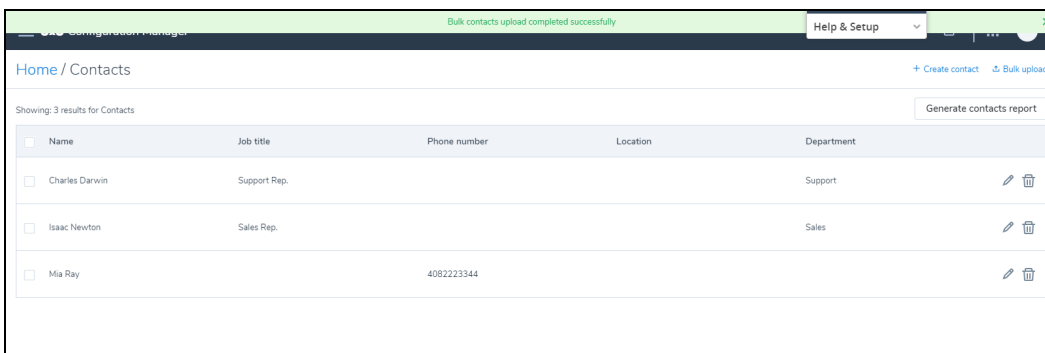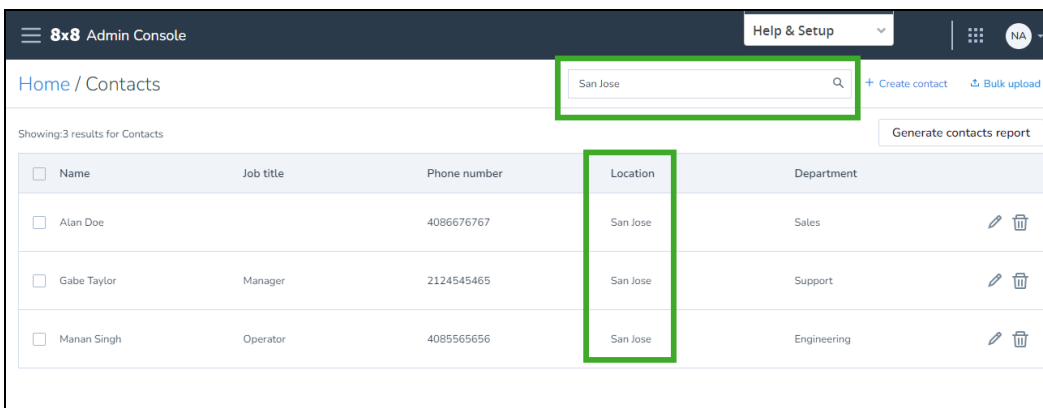
Note: To update external contacts in bulk, click **Generate contact report** to download the existing contacts in the CSV format. Make the necessary changes and save it. Upload the CSV file following the procedure above.

With the ability to search external contacts by name, email, job title, department, phone number etc., you can now access the desired contacts quickly. This comes in handy especially if you are searching through a long list of contacts.

1. Go to **Home > Contacts** to view the list of existing contacts.

2. In the search box, enter a keyword and press Enter to search and filter the contact list based on the keyword.
   A resulting contact list displays.

As an 8x8 Work administrator, once you have uploaded the external contacts, they are visible to phone system users via the following apps:

> Note: We do not support presence for external contacts.

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- 8x8 Work for Desktop: Find the external contacts in the Contacts tab.
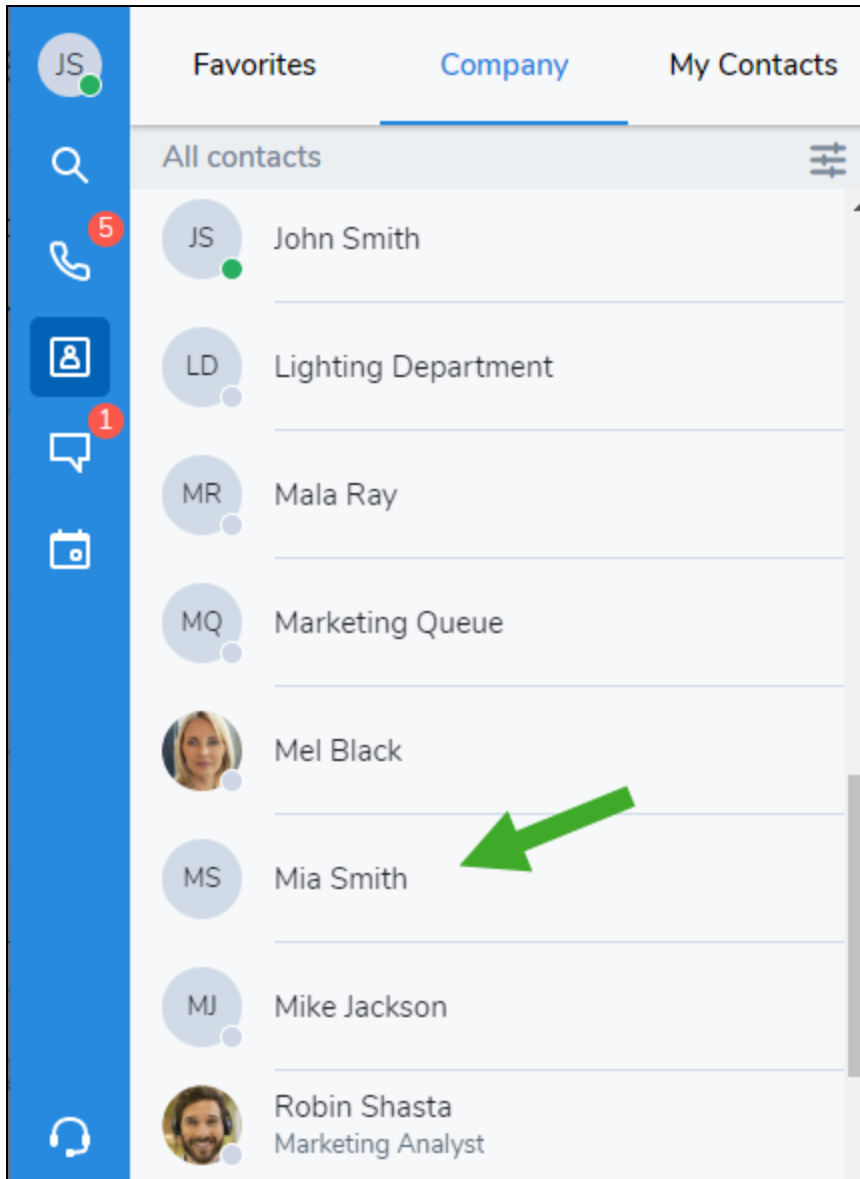
- 8x8 Work for Mobile
- 8x8 Frontdesk
- 8x8 Contact Center Agent Console

Bulk contact upload template fields

The following table lists the configuration fields (mandatory and non-mandatory) used to create contact in bulk.

Column Header	Required/ Optional	Purpose	Allowed values and limitations	Notes
Contact.FirstName	R	Given (First) name		- Free text, minimum two characters. - Valid special characters: ., &, -, _, ' .
User.LastName	R	Family name or last name	maximum 30 characters	- Free text, minimum two characters. - Valid special characters: ., &, -, _, ' .
NickName	O	Nickname		
Contact.Title	O	Contact's job title such as Sales Representative or Executive Assistant.		- Free text - Appears in the contact directory as the title.
Contact.Department	O	Contact's department such as Sales or Marketing.		Appears in the contact directory.
Contact.Location	O	Contact's location		
Contact.PhoneNumber	O	User's phone number including the country code.	Multiple values with format number1 type1: number2 type2 where type can be WORK, MOBILE, HOME, OTHER, e.g. e.g. +12345678901	The user's personal contact number such as cell phone.

Column Header	Required/ Optional	Purpose	Allowed values and limitations	Notes
			WORK: +447890123456 MOBILE	This number appears in the contact directory as the personal telephone number. • Excel interprets **+** prefix as a formula operator. Do not include the **+** prefix, or replace it with 00. For example, use 14088001500 instead of +1408800150 0, or 004420709660 00 instead of +44207096600 0.
Contact.Emails	O	Contact emails address	Single Email address	Must be a valid email address.
Contact.Custom.Field1	O	First custom field		
Contact.Custom.Field2	O	Second custom field		
Contact.Custom.Field3	O	Third custom field		
Contact.ContactID	Required only if updating existing	Unique ID from a pre-vious Contacts Report		

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Column Header	Required/ Optional	Purpose	Allowed values and limitations	Notes
	contact	download		

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Role-based access control

8x8 Role-based access control (RBAC) is a mechanism around roles and privileges to manage 8x8 Work administration. It allows you to assign permissions to users based on their role within an organization. RBAC lets users have access rights only to the information they need to do their jobs and prevents them from accessing information that doesn't pertain to them. Roles can be used to address multiple needs of your business, from security and compliance, over efficiency and cost control.

Let's say your business needs a role with permissions to configure the entire phone system, a role with permissions to just create sites and users, and another role to manage work groups such as call queues and paging groups. 8x8 RBAC now offers system-defined roles and the ability to create custom roles with site specific scope to meet the varying needs.

Availability

This feature is currently available to all 8x8 customers.

Features

- Manage 8x8 Work administration more efficiently by granting access rights to specific phone system functionality
- Use roles to distribute 8x8 phone system and contact center admin duties within your team
- Access readily available predefined roles allowing full access or partial access
- Create custom roles with site specific scope
- Customize role permissions to suit your business needs
- Define roles with access to specific 8x8 applications
- Assign any number of roles to a user based on the duties they perform
- Allow users to manage a single site or multiple sites
- Create admin roles to exclusively manage 8x8 ordering, billing, and cost centers
- Assign roles to administrators for improved efficiency

8x8 predefined roles

Roles are permission sets that control access to areas and features within the 8x8 phone system configuration tool. You can distribute duties within your team and grant access to features that are relevant to performing their job. 8x8 now introduces role-based access control for 8x8 Work administrators. Company admin roles with full access to the 8x8 Admin Console application have been available until now. In this release, we offer the following new roles and the ability to create a custom role.

- **Basic Admin**: This role offers basic access to 8x8 Admin Console.
- **Company Admin**: This role offers full access to 8x8 Admin Console including users, phone numbers, devices, workgroups and beyond. They do not have access to the 8x8 Admin Console.application.
- **IT Admin**: This role offers access to users and workgroups in 8x8 Admin Console. This allows them to create and manage users and their work group permissions.
- **My8x8 Admin**: This role offers access to 8x8 Billing, Ordering, and Cost centers along with privileges to submit and manage cases. This role can be cloned and modified for granular access to specific functionality. Let's say you wish to create roles with exclusive access to billing or ordering, simply clone this role and modify the granular access. Learn more.
- **VCC Admin**: This role offers access to the 8x8 Contact Center Configuration Manager application only. The role will not have access to the 8x8 Admin Console application. They can configure their contact center using the 8x8 Admin Console app. They are unable to add users or assign licenses to users.

Use Case

Let's say your company has users distributed in multiple cities such as San Francisco, London, New York, and Sydney. As a phone system admin for your company, you have created a separate site for each location and grouped users and services per site. With RBAC, you can now define a site specific admin who will oversee all 8x8 functionality for that specific site. As a primary admin, to access all functionality for all sites, you can assign yourself with the Company Admin role with company wide scope. Learn more about how to create a site admin.

Access roles and assignments

As an 8x8 phone system administrator, you can now access predefined roles, create custom roles, assign roles to users, all using the Role-based access control feature.

1. Log into 8x8 Admin Console.
2. From the menu, go to **Roles and Permissions** > **Roles**.

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3. View the list of predefined roles available to your organization.

> **Note**: The VCC-admin role is available only if your company subscribes to 8x8 Contact Center services.

4. View the permissions of any role by simply clicking ⊙ . It opens up the role and its assigned permissions.

> **Note**: You cannot delete or edit permissions of system-defined roles. To customize a system-defined role, simply clone it, and edit the permissions as you wish.

Create a custom role

Wish to create a custom role with specific permissions in the 8x8 Admin Console? Let's say you want a role with permissions to access just call queues, paging groups, and BMW (Barge Monitor Whisper) groups. You can now create a custom role, select the desired permissions, and save the role. You can then assign the custom role to any user. You can also clone a system-defined role, modify the permissions, and save it.

You can also assign roles with site specific scope. Let's say you want a user to be the Company admin but for a specific site, simply limit the scope to the desired site.

> **Note**: Devices, licenses, and phone numbers are not site aware. For example, a site admin can view all devices available to the company not just the devices assigned specifically to the site they have access to.

To create a custom role:

1. In the **Roles** page, click **+Create role** on the upper-right corner.
2. In the following page, under **Details**, enter a role name.
3. From the list of permissions, select the permissions you want to assign to this custom role.
4. Click **Save**. The new custom role is now listed along with other roles

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> **Note**:You can also clone a system-defined role and modify the permissions as needed to create a new role.

Assign roles

You can assign any role defined in your phone system to users. Simply select a user and assign single or multiple roles. Assign company wide access or limit the user to a specific site scope. Let's say you want to create a site admin for your San Jose office, simply assign the Company Admin role to the user and change the scope the San Jose site.

To assign a role:

1. From the menu, go to **Roles and Permissions** >**Assignments**.

2. In the **Role Assignments** page, click **+Create Assignment** on the upper-right corner.

3. In the **Create assignments** pop-up, select the user from the list.

4. Set the scope to company or to a single site or multiple sites.

5. Select the role you wish to assign.

6. Optionally, to assign multiple roles to the user, click **+Add assignment**.

7. Click **Save**. View the user you just assigned with a new role in the assignments list.

Create a site admin

Let's say your company has users distributed in multiple cities such as San Francisco, London, New York, and Sydney. As a phone system admin for your company, you have created a separate site for each location and grouped users and services per site. With RBAC, you can now define a site specific admin who will oversee all 8x8 functionality for that specific site. As a primary admin, to access all functionality for all sites, you can assign yourself with the Company Admin role with company wide scope.

To create a site admin:

1. From the menu, go to **Roles and Permissions** > **Assignments**.

2. In the **Role Assignments** page, click **+Create Assignment** on the upper-right corner.

3. In the **Create assignments**pop-up, select the user from the drop-down.

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4. Select the **Company Admin** role you wish to assign.

5. Select the scope to a single site or multiple sites. Simply select the sites from the menu.

6. Click **Save**.View the user you just assigned with a new role in the assignments list.

Create a billing or ordering admin

When you assign the My8x8 role to an admin, they get full access to the My8x8 portal with the following capabilities:

- Manage 8x8 billing and cost centers
- Manage 8x8 Ordering

> **Note**: The My8x8 Admin role is not site aware. It is set to company wide access.

Let's say you wish to create roles with exclusive access to billing or ordering, simply clone the default My8x8 Admin role and modify the granular access. Follow the steps described here.

1. From the menu, go to **Roles and Permissions** > **Roles**.

2. In the **Roles** page, from the list of predefined roles, select the **My8x8 Admin** role

   and click **Clone** to clone it.

3. Enter a name such as Billing Admin to the new custom role. Note that the role is set to My8x8 application.

4. Under **Permissions**:

   - To create a Billing admin role, select **Billing** from the choices.
   - To create an Ordering admin role, Select **Ordering**.

   > **Note**: The My8x8 admin role offers access to billing, ordering, and cost centers.

5. Click **Save**.Note the new custom role is now listed along with other roles.

1. From the menu, go to **Roles and Permissions** > **Assignments**.

2. In the **Role Assignments** page, click **+Create Assignment** on the upper-right corner.

3. In the **Create assignments** pop-up, select the user from the list.

4. Select the **My8x8 Admin** role or the custom **Billing/Ordering** admin role you created in step 1.

5. Select the scope to a single site or multiple sites. Simply select the sites from the menu.

6. Click **Save**. View the user you just assigned with a new role.
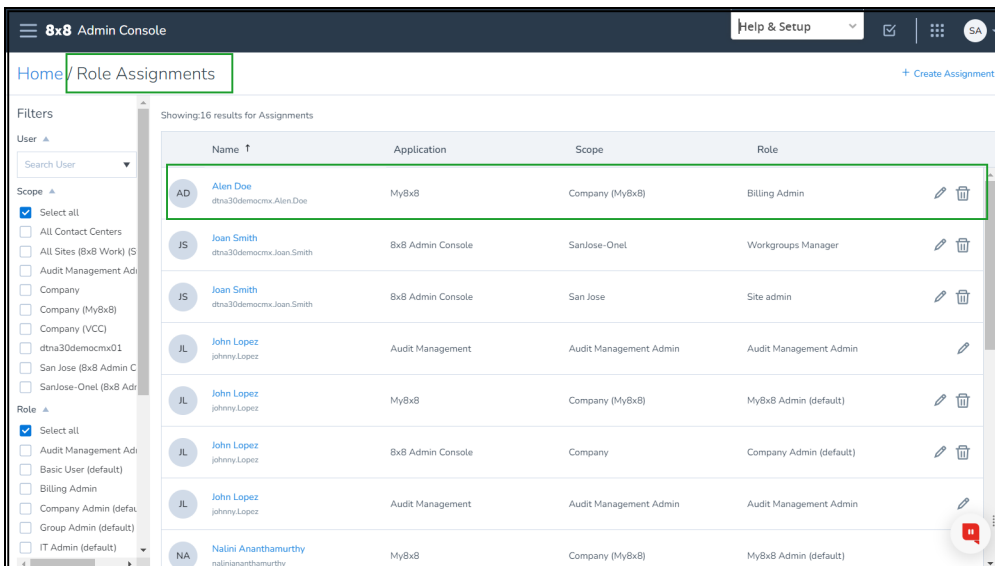
1. As a final step, log in as the user assigned with the new role.

2. In the application panel, select the **My 8x8** tile.

3. The portal launches with exclusive access to Billing or Orders only.

Verify the role assignment

1. Log in as the user assigned with the Work Groups Manager role or any user with a role.

2. From the application panel, select 8x8 Admin Console.

3. Notice that you have access to only the permissions available to the role.
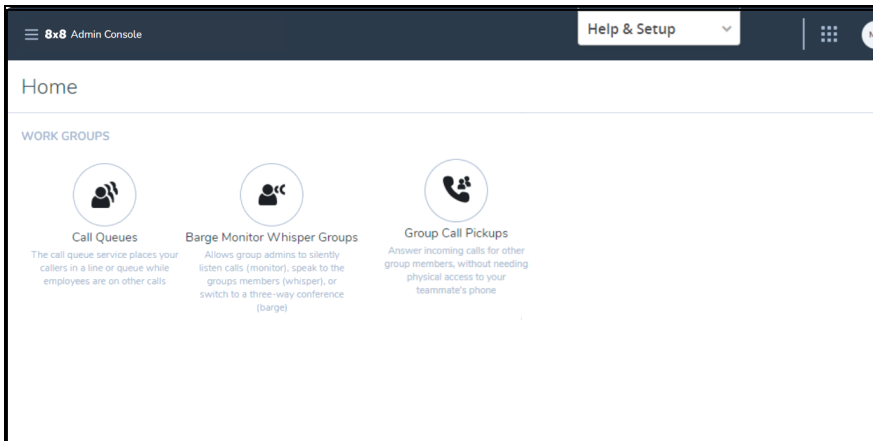
Audit events

The Audit events feature in 8x8 Admin Console allows administrators to review configuration changes made to their 8x8 services over a period of up to 90 days, in 30-day increments. Use this feature to see who made a change, when the change was made, what type of change was made, and the details of the change. Currently, you can select to view the changes made to:

- Users
- Auto attendants
- Call forwarding
- Call queues
- Phone numbers
- Extensions
- Ring groups

> **Note**: You must have administrator privileges to access and view audit results.

As an administrator, you can:

1. Log in to your 8x8 Admin Console account.
2. From the menu ▤, go to **Audit events**.
3. From the left side of the window, apply the necessary filters, such as the date range, who made the change, the impacted entity, etc, to obtain the desired results.
   The page refreshes automatically to display the results.

If the search doesn't yield any results, a message displays informing you that none of the audit events matched the query.

Use the filtering capabilities available in the Audit events viewer to limit the audit event results to specific data. The following filters sections are available in **Audit events**:

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- **When**—Use to specify a date range for the audit events you are interested in. You can select to view events from today, the last 24 hours, the last 7 days, and the last 30 days. You can also search for a custom date range, to a maximum of 90 days.

> **Note**: Each query is limited to a maximum window size of 30 days. If you wish to return 90 days of data, you will need to query three times (each query set for 30 days).

- **Who**—Use to limit the results to the user who initiated the change. Select the desired user from the drop-down list.
- **Operation**—Use to filter the results based on the operation that caused the change. You can select to filter for entities that were created, deleted, or edited.
- **Impacted entity**—Use to filter the results based on the entity that was changed. For example, if you are only looking for changes to Auto Attendants, select it from the list and the search will return only the changes done to auto attendants. You can filter for the following impacted entities:
  - All
  - Auto attendant basic information
  - Call forwarding rule
  - Call queue
  - Phone number
  - Extension
  - Ring group
  - User basic information

You can also use the search field located at the top right corner of the page to search for a specific entity name that was changed. For example, you can search for a user's name to find only the change events that impacted that user.
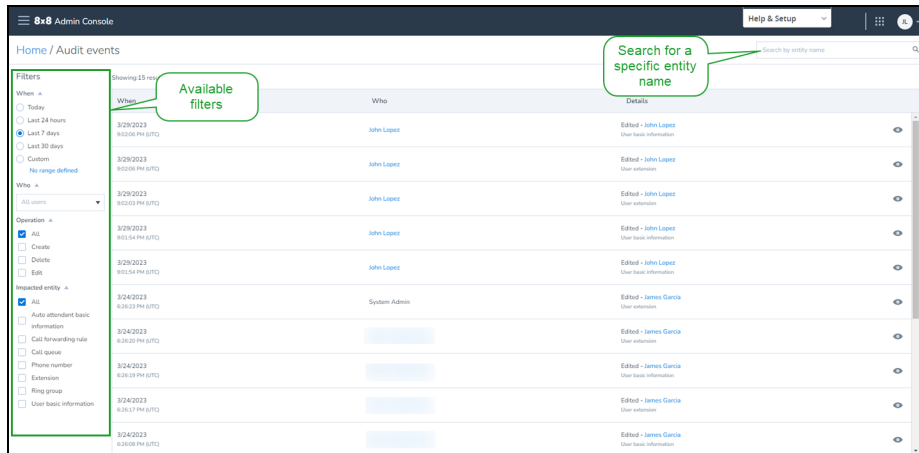
After applying your filters or after searching for a specific entity, the results display on the page. The number of events that match your search is listed at the top left corner of the results list.

The results list includes information such as when the change occurred, who created the change, and a quick summary of the change details.

To see the full details of an event:

1. In 8x8 Admin Console, go to menu ▤ > **Audit events**.

2. Use the filters to find the event you are interested in.

3. Click the event or click the view 👁 icon in the event's row.

4. In the side panel that displays, you can view more detailed information about that particular event.

   - For newly-added entities or attributes, you will see only the details of the new content.

   - For changed attributes, you will see the original values highlighted in red, and the new values highlighted in green.

5. To close the side panel, click ˣ from the top left corner.

Objects reported as changed in Audit events, such as user basic information, call forwarding rule, and extension, can be edited. If you need to edit a changed object listed in your audit events search results, select the object from the list or click the view icon to view the details. In the side panel that displays, click the edit icon located at the top right corner. You are redirected to edit the info in the 8x8 Admin Console.

Customer admins with appropriate permissions can generate a CSV report of Audit Events. Export capability to the audit log enables customer admins to self-manage their audit data according to their data governance and retention requirements and to process 8x8 audit events in external audit tools.

The report includes all the columns viewable to the user, as you selected, without making any additional column selections.
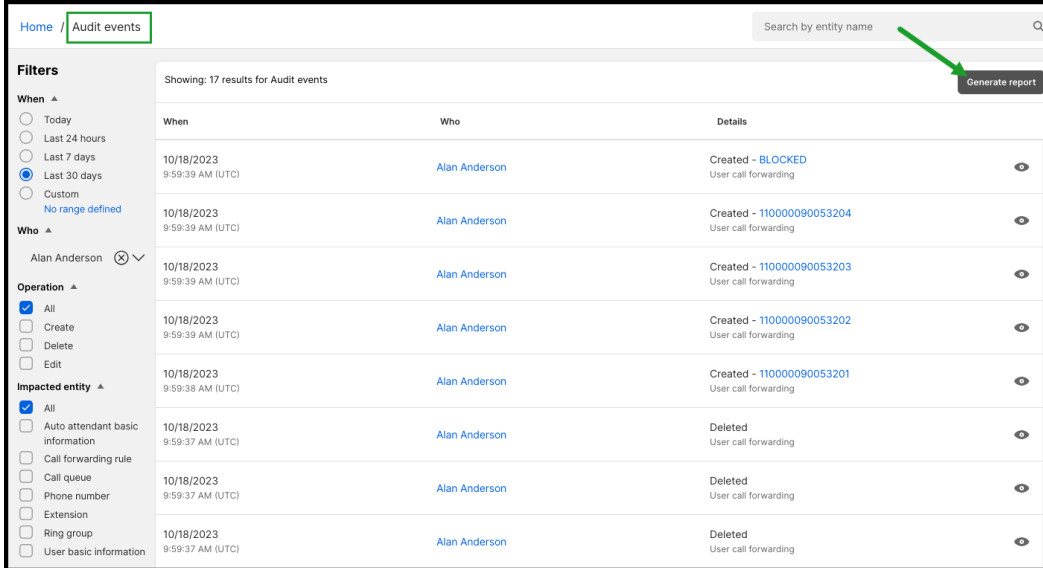
This capability is helpful for long-term storage and offline analysis.

To generate an audit events report:

1. Go to **Home** > **Audit events**.

2. On the **Audit events** page, in the upper-right corner, click **Generate report**. A CSV

format report is generated.

3. Click **Download** and and save the .CSV report locally.

Notes:
- The report contains a maximum of 50.000 rows.
- The output contains identifiers and details in JSON format.

Audit Events report column description:

Many columns provided in the Audit events CSV report contain internal identifiers (alphanumeric) to ensure consistency and strict accuracy of the audit data. In many cases, the human-readable version is available in the details column.

Note: Future releases of the Audit Report will also contain the human-readable form, where applicable, for those fields where it is not currently available.

The following table lists the fields displayed when creating the audit events viewer report. Download the .CSV report and save it locally for further use:

Column	Description
displayName	The human-readable form of the **entityKey** (where applicable). For example, if the **entityType** is user, this will contain the user's first and last name
auditTimestamp	The date/time (in UTC) when the event was registered.
eventType	Specifies how the event changed/accessed the entity: create, update, delete, read, export.
service	Specifies which 8x8 service was involved in the event. At the time of writing, only **platform** is available; platform refers to changes made in the 8x8 Admin Console.
entityKey	The identifier of the entity that was changed/accessed in this audit event.
entityType	Specifies the type of entity that was changed/accessed in this audit event. For example, user, extension, and call forwarding.
auditUserId	The identifier of the user who made the change (or accessed the record).
impersonator	In rare cases where 8x8 agents make changes on behalf of customers (for example, as a result of a support request), the **impersonator** column will contain the identifier of the user who made the change.
details	Contains detailed information on which attributes of the changed entity were updated. This field is in JSON representation:

Column	Description
| | ```json
{
    "new":{
        "changedAttributeName":"new value",
        "newAttributeName":"added value"
    },
    "old":{
        "changedAttributeName":"old value",
        "deletedAttributeName":"deleted value"
    }
}
```<br><br>- The "new" object contains all of the newly-added attributes and the new value of changed attributes.<br><br>- The "old" object contains all of the deleted attributes and the old value of changed attributes. |
| **correlationType** | When several changes are made to various entities as part of one change set, the **correlationType** displays the parent entity type.
For example, if an extension was assigned to a user during a user creation flow, the **entityType** would be "extension", and the **correlationType** would be "user". |
| c**orrelationID** | The identifier of the parent entity of this change. |

8x8 Contact Center Channels and rerouting

8x8 Contact Center allows you to manage how your contact center voice traffic is channeled via routing plans. You can set up routing plans and forward voice interactions to another phone number. By default, all routing plans are set to direct inbound traffic to the primary tenant. The following built-in rerouting options in 8x8 Contact Center help you maintain business continuity:

- **Primary Plan**: By default, this plan routes all voice interactions through your voice channels assigned to your contact center tenant. This plan can be modified, if desired.
- **Alternate Plan**: This plan offers call forwarding choices. Route your contact center inbound calls to an alternate phone number such as a phone queue or workplace.

Audience

This topic is intended for 8x8 Contact Center administrators responsible for enabling channel rerouting for their contact center.

Availability

The 8x8 Contact Center channel rerouting service is available to all 8x8 Contact Center customers.

Features

- Define and validate rerouting plans in advance
- Switch and manage routing plans quickly

Configure channel rerouting

If your company wants to redirect calls, use our Channel Rerouting services and forward calls from channels to external phone numbers.

1. Log into 8x8 Admin Consoleand go to **Channels & logins routing** from the menu.
2. Note that you have access to the following two plans:

- **Primary Plan**: By default, this plan routes all voice interactions through your voice channels assigned to your contact center tenant. This plan can be modified, if desired.

- **Alternate Plan**: This plan offers call forwarding choices. Route your contact center inbound calls to an alternate phone number such as a phone queue or workplace.

3. Select a plan and click **Configure**. Under **Voice Channels**, select the channels you want to reroute the traffic from and click **Edit Routing Plans** or select to edit channels individually.

4. At the prompt, select to forward calls to the primary tenant or an external phone number.

5. If you choose to forward calls to an external phone number, enter the phone number.

6. If you are editing an active plan, acknowledge that you are making changes to an active plan.

7. Click **Save and Apply**.

8. To ensure that rerouting has taken effect, place a test call to the channel that has been redirected and confirm that you receive the call from the redirected number.

Set up automatic call handling

Automatic call handling (or Auto Attendant) is a way to route inbound calls to your business. Use auto attendant to let your callers interact with the automated voice menus you define, and self-direct the calls without requiring any manual operator or receptionist. You can plan what you want your callers to experience when they call your company, define schedules and rules, and set up professional greetings for your business.

We recommend that you set up users, ring groups, and call queues before setting up your auto attendant.

Benefits of automatic call handling

- **Look more professional**: Auto attendants make your company look more professional.
- **Replace the receptionist**: It replaces the need for a receptionist and saves you money.
- **Route calls efficiently**: It connects your callers to the right resource quickly and efficiently.
- **Customize for different hours**: You can play different menus for business hours versus after-hours.
- **Creating your greetings is easy**: You can record your own and upload them, or upload customized prerecorded greetings. You can even use the 8x8 Audio Production Store for professionally recorded greetings that enhance your image.

Features

The following features are available in automatic call handling:

- **Shared schedule**: Update your business hours centrally, and use the hours across multiple auto attendants. The business hours schedule is automatically adjusted for the time zone of the auto attendant.
- **Audio prompts**: Manage your auto attendant's audio prompts centrally.
- **Text-To-Speech prompt**: Create Text-To-Speech (TTS) prompts using over 50 languages.
- **Simplified menus**: Take advantage of the simplified open, closed, and holiday menus.
- **Lunch schedules**: Define lunch hours for any working day.
- **Exception schedules**: Define exceptions for any changes in your regular business hours.
- **Holiday menu**: Prepare an alternative prompt for holidays with shortened or closed business hours.
- **Alternate menu**: Prepare an alternative prompt during an emergency that prevents you from operating during your regular hours.

- **Test menu**: Test your auto attendant and enter a valid phone number to call, listen, and interact with the menu. You must log in as a user to run the test, and have 8x8 Work services assigned to the user profile you log in to.
- **Call direction**: Direct callers to ring groups, call queues, voicemail, and even additional auto attendants.
- **Ability to clone**: Clone an existing auto attendant and edit the site or language information, select a phone number, and get them going quickly.

Limitation

Auto attendant's caller ID does not appear correctly.

Use case examples

The links below show some examples of auto attendant use:

- Small Office: Set up your auto attendant to back up your live receptionist.
- Store Front: Use ring groups to make all phones ring at once, and set up group voicemails.
- Start Up: Use an auto attendant and ring groups to make your company look bigger.
- Multiple Languages: Use an auto attendant to set up sub-menus for multiple languages or businesses.

Set up automatic call handling

To set up automatic call handling, you must follow the following steps:

To set up auto attendant, answer the following questions:

- Identify the calls you want to go to the auto attendant. Should all inbound calls go through the auto attendant, or just those that your live receptionist can't answer? Is the time of day important?
- Identify the business hours, holidays, and any exceptions. Is it a 24/7 business, or is there a custom schedule? Create a schedule.
- How do you like to treat calls during closed hours, and on holidays and corporate events?

- What menu options do callers have? Does one menu work, or do you need sub-menus?

- Determine where to route calls. Should they go to a person, a group, or a cell phone? What happens when calls aren't answered? With auto attendant, you can route a call to a call queue, an extension, an external number, or a ring group. Create the desired call queues and ring groups, and set up individual extensions. Check out some tips about writing your auto attendant script(s).

- Write down your voice menu script. Do you need support for multiple languages? For example: "Thank you for calling Specialty Cookies. If you know your party's extension, you may dial the number at any time. To check on the status of an order, press 1. To talk to our Sales department, press 2. For Shipping, press 3. To access our contact directory, press 8. To hear this menu again, press 9. For operator assistance, press 0."
  Check out some tips for recording your auto attendant menu.

Your auto attendant is tied to your business schedule, and is activated during the business hours. Let's say your business operates five days a week from 9 AM to 5 PM, and you are closed on Saturdays and Sundays. You must define a schedule with these business hours, and create your call routing choices in the auto attendant.

To create a schedule:

1. From the main menu, go to **Auto Attendants > Schedules > + Create Schedule**.

2. Enter a **Name** for the schedule.

3. Define your **Weekday Schedule**.
   You can define your schedule independent of the time zone, and share the common business hours schedule across auto attendants in different time zones. Each auto attendant automatically applies the time zone it is associated with. Hours outside of open hours are automatically treated as closed hours.

4. Add a lunch hour:

   a. Click ✎ next to any open day to add lunch hours.

   b. In **Edit business hours**, define the **Open** hours before the first lunch.

c. Click **+** to add a lunch status.

d. Select **Lunch** in the drop-down list and select the time.

e. Add as many lunch and open hours as your business allows. You can also add multiple open hours in a day like a restaurant business that is open for lunch and again for dinner.

f. Click **Save**.

   You can define a call routing option during the lunch hour. For example, a doctor's office can announce to the callers that the office is closed for lunch from 1-2 pm, Monday - Friday, but callers can leave a message for the receptionist at any time, or call 555-555-5555 in the case of emergency.

5. Add an exception to your regular weekday hours:

   a. While editing **Schedules**, open **Exceptions to weekday schedule**.

   b. Click **+ Add an exception**.

   c. Enter the **Date** and a descriptive **Name** for the exception.

   d. Click to **Add business hours**, if applicable. Everything outside the business hours is considered as closed.

   e. Click **Save**.

      The weekday exception indicates days and hours that your business has a different schedules from your usual business hours. For example, a clothing store has a special sale for 4th of July which is a Wednesday. The store manager needs to define a different open and lunch hours for this day as the business hours are extended for this day. The weekday call flows still applies to the exception weekday hours.

6. Add holidays and exceptions to your regular business hours:

   a. While editing schedules, open **Holidays exceptions**.

   b. Click **+ Add a holiday**.

   c. Enter the **Date** and a descriptive **Name** for the holiday, such as Thanksgiving Day. Holidays defined in this sections overrides the regular weekday schedule.

   d. Click to **Add business hours**, if applicable. Everything outside the business hours is considered as closed. The holidays call flow applies to the dates when business hours need to follow a different schedule and a different call flow.

7. When you are finished, save your changes. The new schedule appears in the list of schedules in auto attendant, and can be shared with other auto attendants.

Now that you have created a schedule, you need to configure the call handling menus, including the welcome message and call routing rules.

To create an auto attendant:

1. Go to **Home > Auto Attendants > Auto Attendants > + Create Auto Attendant**. You can also clone an existing auto attendant and edit the site or language information, select a phone number, and get them going quickly. For details, see our content on Clone Auto Attendants.

2. Under **Details**, enter a **Name** for your auto attendant. A descriptive name helps you locate a specific auto attendant when more auto attendants are created on your phone system.

3. Select a **Site** (or location) for your business. The auto attendant automatically inherits the time zone and language specified for the site, unless you specify otherwise.

4. Enter a **Phone number** and **Extension Number**. Enter the plus sign (+) and the country code, such as +1 408, to filter all numbers starting with that country code. This can specially help filter the international numbers such as +44. To easily locate the UK number +44 121 704 4455, enter **+44** or the country code. You can use the extension number later to forward calls from call queues or ring groups to this auto attendant.

5. Click to enable **Display Auto Attendant in company directory** option. The auto attendant name and extension appears in the company directory.

6. Under **Auto Attendant Profile**, select the **Time Zone** and **Language**. The selected time zone applies to your business schedule, which is linked to the auto attendant. The selected language determines the language of text-to-speech prompts, system default prompts, and messages in auto attendant. If you choose a language other than the default selected for the site, you must create and save your audio prompts in the new language; otherwise, no prompt is presented.

7. Select an available schedule from the list. Optionally, click **Edit** if you want to modify it:

   a. If you have created a schedule before, it shows up in the list. If you have not created a schedule, you receive a prompt to create one at this point.

   b. For network emergency, under **Details**, enable **Apply Alternate Menu**. Alternate Menu is used to handle unexpected events that require your business to be closed (or open) beyond scheduled hours. Calls are routed based on the options you have defined under **Call Handling Menus** > **Alternate** > **Alternate hours menu**. If you disable this option, the calls are routed back to the regular scheduled routing. If your network is running smoothly, this option must be disabled.

8. Set up **Call Handling Menus** to route the calls. **Call Handling Menus** allow you to define call routing options when your business is open, closed, on holidays, or in a state of emergency. Call handling menus become available for configuration once you select a site.

   a. For weekdays open hours, create the welcome message and audio prompts using one of the following options:

      - **Use text-to-speech**: Type your message such as: "Welcome to AcmeJet's Sales and Support. For Sales, press 1. For support, press 2". Text-to-speech is used to create a computer-generated voice in the language defined in your auto attendant.

- **Play audio file**: Create your custom audio file by uploading an existing file or recording a prompt. For details, see our content on Manage audio files library. The system then calls the number you entered and prompts you to record a new audio. Here is an example of the auto attendant prompt:
"Thank you for calling AcmeJets. If you know your partys extension, you may enter it at any time. "For Sales, press 1. For Sales, press 1. For support, press 2." You can also select the default audio file, or delete/replace your custom files.

- **Skip playing prompt**: Do not play an audio prompt. Let's say you want to send callers directly to a ring group or call queue during open hours, but direct callers to auto attendant during closed hours; you would choose to play your auto attendant prompt only during closed hours, and skip playing the prompt during open hours.

> **Note:** If you choose to skip the audio prompt, voice menu instructions do not play for the caller; you must rely on other methods to inform callers, such as entering the call menu information on your organization's Contact Us web page.

b. Click **Edit Setting** next to **Menu** to set up additional rules for when callers fail to select an option from the call menu. By default, the auto attendant menu replays once. Further failure of action from callers results in a dropped call. However, you can edit these settings to edit the number of menu replays and call routing when there is no action by callers. You can also allow callers to dial an extension at any time, define the scope of contact directory whether it is one site or all sites, the number of seconds the system waits after each input, the number of replays, and

the final action whether to route the call or hang up.

c.   Click **+Add key** to route the incoming calls.

   A.   In the **Key manager** window, select a key from the drop-down list such as **1-empty**. Empty means the key is free and available for use.

   B.   Select a routing destination from the drop-down list to route your incoming calls, and save.
   For example, you can choose to add a sub-menu (including prompt and keys), send the call directly to voicemail, repeat the menu for the caller, transfer the call to a user, a service (such as call queue or ring group) , or an external number. You can also let the caller dial the company directory, a name, or an extension at any time.

> **Note:** If you have created an Auto-Attendant in another language such as Spanish or Italian, you can select that Auto-Attendant as the target for the service key. Modify your prompt to inform your callers about the language choices. For example, you can write: "Welcome to AcmeJets Inc. For Spanish, dial 1. For Italian, dial 2." The call routing option for key 2 can now point to an Auto Attendant in Italian.

9. Repeat the above procedure for the following times if needed:
   - **Weekdays** closed and lunch hours.
   - **Holidays** open, closed, and lunch hours.
   - **Alternate Menu** for exceptional events, such as outages or emergencies that prevent your phone system from working properly. See how to create Alternate Menu.

10. Click to **Save** your call handling menus.

The **Alternate Menu** setting is used to handle unexpected events that require your business to be closed (or open) beyond scheduled hours. You can create an alternative menu and turn it on during emergencies. The incoming calls are routed based on the options you have defined under **Call Handling Menus > Alternate Menu**. You must turn off the alternate menu to restore call routing back to schedule-based routing. For example, if you have a power outage and cannot assist customers, record and save a purpose-made prompt, such as "We are experiencing a power outage at the moment; please check with us later." To restore call routing to the regular schedule once the emergency is over, remember to enable the alternate menu during the emergency and disable it once the emergency ends.

To create an alternate hours menu:

1. Go to **Home > Auto Attendants >Auto Attendants.**

2. Click ✎ to edit an existing auto attendant.

3. Under **Call Handling Menus** menu, click **Alternate > Alternate hours menu**.

4. Select which prompt to play and add keys to route the calls. For details, follow the instructions for call handling menus.

5. Enable **Apply Alternate Menu** under **Details**.

6. Save your changes.

   The incoming calls are routed based on the options you define for the alternate menu. Make sure to disable **Apply Alternate Menu** once the emergency is over.

View auto attendants

You can view your auto attendants by going to **Home > Auto Attendants > Auto Attendants**. For customers with multiple sites and a large number of auto attendants are able to filter the auto attendants based on their sites. It helps them paginate and locate their auto attendants quickly. To view auto attendants:

1. Go to **Home > Auto Attendants > Auto Attendants**.

2. Under **Filters**, click a site(s) or/and a PBX(s).

   The auto attendants for the selected site(s) or/and PBX(s) appear on the page.

Clone auto attendants

If you have a lengthy auto attendant menu that must be replicated for multiple offices or in multiple languages, you can clone an existing auto attendant and edit the site or language information, select a phone number, and get them going quickly.

   To clone an auto attendant:

1. Go to **Home > Auto Attendants > Auto Attendants.**

2. Click ⠇ next to an existing auto attendant, and select **Clone**.

3. A copy of the existing auto attendant opens. Enter the name and site or location, make the desired changes and save.

FAQ

Refer to the following frequently-asked questions for more information:

Auto attendants can serve as backup to a live receptionist, or can facilitate the transfer of calls without the need for a human operator. If you expect high call volume and would like to direct callers using an automated voice menu, use 8x8 auto attendant to set up automatic call handling. In addition, auto attendants allow you to easily switch between modes of operation during standard business hours, holidays, and emergencies.

You can select a language different from your site language in auto attendant. The selected language determines the language of text-to-speech prompts, system default prompts, and messages in auto attendant. If you choose a language other than the default selected for the site, you must create and save your audio prompts in the new language; otherwise, no prompt is presented.

Yes you can. You can change the language without any restrictions.

You can add lunch hours for your business during regular business hours, exception days, and holidays, by going to **Home > Auto Attendants > Schedules** then click to create or edit a schedule. See how to add a lunch hour for instructions.

1. Go to **Home > Auto Attendants > Auto Attendants > + Create Auto Attendant**.
2. Scroll down to **Call Handling Menus**, and click **Select an Audio File**.
3. Select **by calling on phone to record**. The system calls your extension or your desired number, and prompts you to record new audio. Provide a name for this new audio file, so that you can easily locate it when needed. You must have 8x8 Work services assigned, and be currently logged in as a user.

- To edit an auto attendant, go to **Home > Auto Attendants > Auto Attendants** and

  click next to the desired auto attendant.

- To delete an auto attendant, go to **Home > Auto Attendants > Auto Attendants** and

  click next to the desired auto attendant.

From the main menu in 8x8 Admin Console, go to **Home > Auto Attendants > Auto Attendants**. While editing the desired auto attendant, scroll down to **Business Hours**, and next to **Select a schedule**, click **Edit**. Make your changes, and **Save**.

While editing an auto attendant, go to **Call Handling Menus** and click **Change file**.

Click next to the audio file that you like to delete. If you do not choose another audio

file before deleting the currently selected audio file, the default audio file will be selected. The audio files repository is also accessible from Users, Call Queues, and Ring Groups edit pages.

Set up line keys (power keys)

8x8 Line Keys (also known as Power Keys) offers additional functionality to your phones. It provides powerful call handling and call monitoring abilities using any supported phone with four or more Line Keys. You can take full advantage of the spare Line Keys on your Polycom phones and additional Line Keys added via sidecars. With 8x8 Line Keys, a manager or a power user can handle multiple calls simultaneously and monitor the availability of other users on the same phone system. As a 8x8 Work phone system administrator, you can configure Line Keys from 8x8 Admin Console, and push these settings to the Line Keys-enabled extension phone.

To take advantage of 8x8 Line Keys, you must add and configure Line Keys for each user from the user profile. A device that supports Line Keys must be assigned to the user profile and activated. For details, see our 8x8 supported phones for Line Keys.

> **Note:** LAKs, SLAs, and BLFs must be added from the 8x8 Admin Console and pushed to the phone device. Speed Dial keys, however, can be created on both 8x8 Admin Console and phone devices. The updates are communicated both ways.

By going to Line Key configuration in the User's profiles, you can configure and access the following features:

- Line Appearance Keys (LAK)
- Busy Lamp Fields (BLF)
- Shared Line Appearance keys (SLA)
- Speed Dial keys
- Sidecars

Features

With 8x8 Line Keys, you can configure and setup additional keys on a hardware endpoint or sidecar such as BLFs, SLAs, and speed dials.

See the feature list for 8x8 supported keys below:

Features	Description
Line Appearance Key (LAK)	- Receive and handle multiple live calls at the same time. - Support one to four default LAKs The number of LAKs depends on your phone. For example,

Features	Description
	Cisco devices support one LAK but four concurrent calls.{mf--confirm please}
Busy Lamp Field Key (BLF)	• Monitor three types of extension: users, group call pickup, and call park.
	• Monitor the real-time call status of a user (whether or not a user is on a call), group call pickup, or call park extensions.
	• Monitor 8x8 Work users on the same phone system, using 8x8 supported phones for Line Keys.
	• Park and retrieve calls quickly using call park extensions.
	• Pick up a ringing call on an extension you are monitoring.
	• Automatically dial to an idle extension that you are monitoring.
	• Instantly transfer a live call to an idle extension you are monitoring.
	• Support most Polycom phones and more. For details, see our 8x8 supported phones for Line Keys.
	• Visually alert the user on incoming calls to pick up a ringing call on a monitored extension; no need to be within earshot of the ringing line.
Shared Line Appearance Key (SLA)	• Monitor the call status of team members.
	• Make important calls on behalf of a manager.
	• Answer calls for absent colleagues.
	• Place calls on hold on one shared device, and pick up from another.
Speed Dial Key	• Quickly dial out to the most frequently-used numbers.
	• Set up quick forwarding rules for the monitored numbers or extensions.
	• Dial to internal and external phone numbers at the touch of a button.
	• Add an unlimited number of speed dials to your device.
	• Use as shortcuts for barge, monitor, whisper, or even log in to a call queue.
	• Configure speed dials to custom destinations such as star commands and custom numbers to fully exploit the power of your voice system.
Sidecars	• Increase the number of keys on the physical phone.
	• Handle additional BLFs and Speed Dial keys.
	• Monitor large number of contacts and manage a high volume of concurrent calls.
	• Use to accept, screen, dispatch, and monitor calls.
	• Reduce the number of lost customer calls and shortens the transaction times.

Features	Description
	• Increase the accuracy of call routing. • Support 28, 30, and 40 keys sidecars.

Limitations

- Only activated and 8x8 supported phones can be configured with Line Keys.

- 8x8 supports Line Keys on multiple sites within the same phone system (PBX). The Line Keys associated with the service extensions or users must be within the same phone system.

Requirements

The 8x8 Line Keys service is supported on all Polycom phones with four or more Line Keys, some Cisco and Yealink devices. See the following lists for the supported phones and the number of line keys:

8x8 supported phones and number of line keys

Phone	Number of Physical Line Keys on the Device
Polycom VVX 150	2
Polycom SoundPoint IP 550, 560	4
Polycom VVX 300, VVX 301, VVX 310, VVX 311, IP 670	6
Polycom VVX 400, VVX 401, VVX 410, VVX 411, VVX 500, VVX 501	12
Polycom VVX 600, VVX 601	16
Polycom Skyline VVX 250	4
Polycom Skyline VVX 350	6
Polycom Skyline VVX 450	12
Cisco	
Cisco IP Phone 7821	2
Cisco IP Phone 7841	4
Cisco IP Phone 8811, 8841, 8851, 8861	10
Cisco IP Phone 7861	16

8x8 Supported Sidecars

Sidecar	Number of Keys Supported for Each Sidecar
Polycom VVX Sidecar 28-Key (Color)	• Each physical sidecar allows three display pages with 28 keys on each; (3 x 28) = 84 keys per sidecar. • Maximum three physical sidecars up to nine display pages; 252 keys total. • Any unused button can be used for speed dial on the attached sidecars. • Supports all VVX phone sets except VVX 1500.
Polycom VVX Sidecar 40-Key (Paper Label)	• Each physical sidecar allows one display page with 40 line keys (1x 40) = 40 per sidecar. • Maximum three physical sidecars up to 120 line keys on paper display. • Supports all VVX phone sets except VVX 1500.
Polycom VVX EM50 Sidecar	• Each physical sidecar allows three display pages with 30 line keys on each; (3 x 30) = 90 keys per sidecar. • Maximum two physical sidecars up to six display pages; 180 keys total. • Works with Polycom VVX 450 phones.
Cisco IP Phone 8800 Sidecar	• Each physical sidecar allows two display pages with 18 keys each; (2 x 18) = 36 keys per sidecar. • Works with Cisco IP 8851, and 8861 phones. • Connect up to three sidecars with the 8861 and up to two with the 8851.

Use Cases

Line Keys can be used:

- By a receptionist who handles multiple concurrent incoming calls, rapidly processes and transfers calls to BLF-monitored users.

- By a group manager, a team leader, or a group admin who observes the presence of other team members during the day, speed dials them for consultation, or instantly transfers a live call to another team member.

- By a team member who actively collaborates with other teams or organizations in the company, and partners and suppliers outside the company. Having quick access to these frequently-used contacts via Line Keys helps users be more efficient.

Set up line keys templates

Line key templates allow you to save time and effort by configuring the Line Keys once and copying it for more users or devices as needed. See how to Set up Line Key Templates.

Add line appearance keys

With 8x8 Line Appearance Keys (LAK), you can handle multiple concurrent calls. 8x8 phones have LAKs that handle calls for the user's extension. By default, a user's phone will have two LAKs to make it easier for a user to switch between two calls using the buttons on the phone. You can add up to four LAKs on the main phone device. This is the number of calls you can have active at any given time. You can add or remove the Line Appearance Keys from the 8x8 Admin Console and push them to the phone device.

Features

- Receive and handle multiple live calls at the same time.
- Support one to four default LAKs The number of LAKs depends on your phone. For example, Cisco devices support one LAK but four concurrent calls.{mf--confirm please}

Limitations

Cisco phones show one key on the left and four lines on the right when the key on the left is selected. Keys cannot be added or removed on Cisco phones.

Set up line appearance keys

You can add a device that supports LAK keys, activate the device, and set up the LAK keys via the Users page.

To set up LAK keys:

1. Go to **Home > Users**.
2. Edit or create a user. See how to Add VO Users.
3. Under **Voice Basic Settings > Device model**, select a device that supports line keys, and activate it. The Line key configuration link appears next to the device.

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> **Note:** The link only appears for devices that support Line Keys, such as VVX 300. Please refer to the list of 8x8 supported phones for Line Keys.

4. Click **Line Key configuration**.
   You find access to three types of keys: **BLF key**, **Speed dial key**, and **Line appearance**.

5. Click **+ Line appearance**. For Cisco devices that support only one LAK, you do not see the button to add more line appearance keys.

6. Select **Line appearance- user** as the line key type. Upon exceeding the limit for line appearance keys (LAK), you are prevented from adding LAKs further. The **+ line appearance** button is disabled.

7. Click **Save**.

   The LAK appears on the list with a green bar indicator. Hover over ⸬ next to each key to drag and drop and rearrange the keys.You see the new LAK on your phone once you save the changes in the application.

8. Click to **Save** the line appearance key.

9. Click to **Save** the user.
   The phone reboots automatically to show the updates. Your LAKs appear on the phone display, and give you the ability to handle multiple live calls.

Edit line appearance keys

You can add, edit or delete LAKs from the Users or Devices pages.

To edit LAK keys from the Users page:

1. Go to **Home > Users**.

2. While editing a user, go to **Voice Basic Settings > Device model > Line key configuration**.

3. Make the required changes and click **Save**. For models supporting two or more line appearances, allow deleting until you have one line appearance.

To edit LAK keys from the Devices inventory page:

You can now access information about which users have Line keys configured on their phone from the Device inventory page. For a quick and easy access to the Line Key configuration page and to edit it from the Devices inventory page:

1. Go to **Home > Devices**.

2. Find an activated device that supports Line Keys and is assigned to one. Click **View device report**.

3. Click ✎ > next to the device that is configured with Line Keys.

4. Make the required changes and click **Save**.

FAQ

Refer to the following frequently-asked questions for more information:

With your phone in front of you, you can identify which Line Appearance Keys, BLF contacts, and speed dials are assigned to each line key on your sidecar from your VVX phone. It gives you the physical line key number. This is particularly useful for 40-key sidecars.

To identify line key assignments from a Polycom phone:

1. Press ⌂ to display the **Home** view.

2. Go to **Settings > Status > Line Key Information**.

3. Press a line key. The assignment and line number for the line key you pressed display on your phone screen.

4. Press the line key twice to return to the previous menu, or tap or select **Back**.

For 40-key sidecars, using the Polycom Web Configuration Utility, you can generate and download a PDF file with the configured line key information. The generated PDF enables you to print line key information for line keys on your sidecars, and insert the paper labels as a directory card on your 40-key sidecar.

To generate Line Key Information PDF:

1. In your Internet browser, enter your phone's IP address into the browser's address bar.

2. Log in as a user with the default password 123, and select **Submit**.

3. Go to **Utilities > EM Directory**.

4. Select the expansion module you want to generate a PDF for.

5. In the confirmation dialog, select **Yes** to download the PDF for the configured lines for your expansion module.

6. Go to **Save > Open**. The configured line key information for your sidecar displays as a PDF file.

7. Download the PDF, print it, and insert it as the directory card template for the 40-key sidecar.

In 8x8 Admin Console, you can easily organize the order of your line keys.

To reorder line keys:

1. From the main menu in 8x8 Admin Console, go to the **Users** page.

2. Create a new user, or select a user to edit.

3. Under **Voice Basic Settings** in the user settings, click **Line Key Configuration** next to the configured device.

4. Drag and drop the keys in the desired location, and save. The updates appear on your phone device once it reboots.

Add busy lamp field keys

With 8x8 Busy Lamp Field (BLF) keys, you can monitor the busy status of a shared extension user or pick up calls intended for a Group Call Pickup, or parked on a Call Park extension within the same phone system. BLF keys are physical keys on a desk phone or hardware endpoint that light up to show when there is an active call for a monitored extension. An executive assistant can monitor calls intended for their boss. They can tell when their boss is not available, and pick up the important calls for them.

In addition to the number of keys on the physical phone, sidecars can optionally be added to some models in order to extend the number of BLF keys. BLF keys are created in 8x8 Admin Console and then pushed to the desk phone. You can add as many BLF keys as your device allows.

Features

- Monitor three types of extension: users, group call pickup, and call park.
- Monitor the real-time call status of a user (whether or not a user is on a call), group call pickup, or call park extensions.
- Monitor 8x8 Work users on the same phone system, using 8x8 supported phones for Line Keys.
- Park and retrieve calls quickly using call park extensions.
- Pick up a ringing call on an extension you are monitoring.
- Automatically dial to an idle extension that you are monitoring.
- Instantly transfer a live call to an idle extension you are monitoring.
- Support most Polycom phones and more. For details, see our 8x8 supported phones for Line Keys.
- Visually alert the user on incoming calls to pick up a ringing call on a monitored extension; no need to be within earshot of the ringing line.

Limitations

- Provides support for maximum 1600 BLF keys on a single PBX.
- Only users within the same phone system (PBX) can add BLF keys for another user. Users within the same site are part of the same PBX.
- You cannot monitor auto attendants, ring groups, and call queues with a BLF key.

- The maximum number of keys available using Polycom sidecars is 252. However, it is recommended not to use more than 50 BLF keys per User. BLF keys require more hardware performance than Speeddials. After about 50 keys, depending on the call volume, the phone with sidecars may not be able to keep up. Also, it is important to note TLS/SRTP is enabled by default. This can be disabled to further help alleviate any potential performance issues with the physical phone.

- Due to a Polycom phone limitation, you cannot configure the following two options separately for the incoming calls: Enable call screen notifications, and Enable call audio tone.

- The first key is currently reserved for the user's main extension. BLF keys cannot be placed in the first key position on a phone.

Set up busy lamp field keys

You can add a device that supports BLF keys, activate the device, and set up the BLF keys via the Users page.

To set up BLF keys:

1. Go to **Home > Users**.

2. Edit or create a user. See how to Add VO Users.

3. Under **Voice Basic Settings > Device model**, select a device that supports Line Keys, and activate it. The Line key configuration link appears next to the device.

> **Note:** The link only appears for devices that support Line Keys. Please refer to the list of 8x8 Supported Line Keys.

4. Click **Line Key configuration**.
   You find access to three types of keys: **BLF key**, **Speed dial key**, and **Line appearance**.

5. Click **+ BLF key**.

6. Enter a **BLF extension type** to monitor, such as users, group call pickup, or call park.

7. In **User to monitor**, enter the name or email ID of a user or group to monitor. If the user has both Virtual Office and 8x8 Contact Center licenses, you can see two extensions, one extension for each license.

8. Enter a custom **Label** for the BLF key. The label appears on the phone device display and next to the BLF key.

9. You can select **Enable call pickup for this monitored extension number** so that the user can answer calls that come to the monitored user.

10. Click **Save**.

11. Set up **Additional BLF Call Ringing Notifications**, and save.

    In addition to the flashing red light phone notification, you can also enable call screen notifications and audio tone.

    - If you enable **call screen notification**, full splash screen alerts you when an extension rings.

    - If you enable **call audio tone for incoming calls**, you hear an audio tone when the call comes in.

    > **Note:** Full screen notification shows up on incoming calls when Enable call screen notifications is selected for a BLF. Disable this feature if the user has multiple BLF keys or high call volume for the monitored extensions.

    The BLF key appears on the list with a red bar indicator. Hover over ⠿ next to each key to drag and drop and rearrange the keys.

12. Click to save the BLF configuration. The phone reboots automatically to show the updates. The new BLF key appears on the phone device.

Edit busy lamp field keys

You can add, edit, or delete BLF keys from the Users or Devices pages.

To edit BLF keys from the Users page:

1. Go to **Home > Users**.

2. While editing a user, go to **Voice Basic Settings > Device model > Line key configuration**.

3. Make the required changes and click **Save**.

To edit BLF keys from the Devices page:

1. For a quick and easy access to the Line Key configuration page, go to **Home > Devices**.

2. Find an activated device that supports Line Keys and is assigned to one. Click **View device report**.

3. Click ✎ next to the device that is configured with Line Keys.

4. Make the required changes and click **Save**.

FAQ

Refer to the following frequently-asked questions for more information:

To configure call pickup for a monitored user, you need to enable this option for that particular user. For example, if you like the team leader to pick up Emily's calls, while editing the team leader's line key configuration, go to Emily's BLF and enable call pick up for her.

To enable call pick up for a BLF key:

1. Go to **Home > Users**.

2. While editing a user, click the **Line Key Configuration** link next to the device.

3. Find the BLF key for the user you are monitoring.

4. Select **Enable call pickup for this monitored extension number**, and save your changes.

Yes, you can edit BLF as long as the phone model or brand supports Line Keys configuration.

Add shared line appearance keys

With 8x8 Shared Line Appearance (SLA) keys, you can share a phone line with another team member or your boss. Receive calls intended for another user and place calls on their behalf using their phone number, but from the convenience of your device. Whether you are covering for your boss or a team member who is away from their desk, you can simply use the SLA key on your desk phone to receive as well as make calls on their behalf.

For example, Lisa who is an executive assistant for Rob needs to handle his calls when he is away from his desk or is busy. On Lisa's device, you can set up a shared line appearance key which allows Lisa to push a button and not only answer incoming calls for Rob but place calls on his behalf. She can handle Rob's calls from the convenience of her desk.

> **Note:** You can only have one SLA key for each selected user. If you are part of a group that takes calls for a store, this prevents you from managing concurrent calls via multiple shared lines per person.

SLAs must be added from the 8x8 Admin Console and pushed to the phone device.

Features

With SLA keys, you can collaborate better with your colleagues and engage better with your clients. You can:

- **Monitor the call status of team members**: As a team manager, John can observe the SLA keys on his desk phone to see when Rob, Lisa, and Sarah in his team make and answer business calls on the lines they share with him.
- **Make important calls on behalf of a manager**: As John's assistant, Rob can make calls using his shared line with John to speak with business contacts on John's behalf when John is busy or unavailable.
- **Answer calls for absent colleagues**: Sarah is on sick leave, but she's been working closely with Lisa, who can speak for both of them about their recent project. Until Sarah returns, Lisa answers calls for her.
- **Place calls on hold on one shared device, and pick up from another**: Lisa has received a call that only her teammate Rob can answer. Lisa places the call on hold on their shared line, and asks Rob to pick it from his phone to continue the call.

> **Note:** Sidecars do not support Shared Line Appearance keys.

Limitations

- Sidecars do not support SLA keys.

- You can only have one SLA key for each selected user. For example, you can have one SLA key with Lisa and a second key with Rob, but you cannot have two SLA keys with Lisa.
If you are part of a group that takes calls for a store, this would prevent you from managing large numbers of concurrent calls via multiple shared lines per person.

- When you drag and drop to assign a place for SLA keys:

  - You must place SLA keys before Busy Lamp Field (BLF) and Speed Dial keys.

  - At this time, you cannot remove the current user's line from position 1 on the phone.

- When you answer a call via the 8x8 Work for Desktop or 8x8 Work for Mobile, your shared line with other users does not show up as busy on a call.

Set up shared line keys

You can add a device that supports SLA keys, activate the device, and set up the SLA keys via the Users page.

To set up SLA keys:

1. Go to **Home > Users**.

2. Edit or create a user. See how to Add VO Users.

3. Under **Voice Basic Settings > Device model**, select a device that supports Line Keys, and activate it. The Line key configuration link appears next to the device.

> **Note:** The link only appears for devices that support Line Keys, such as VVX 300. Please refer to the list of 8x8 supported phones for Line Keys.

4. Click **Line Key configuration**.
You find access to three types of keys: **BLF key**, **Speed dial key**, and **Line appearance**.

5. Click **+ Line appearance**.

6. Select **Line appearance - Shared line** as the type. For devices that support both LAK and SLA, upon exceeding the limit for line appearance keys, SLA is the only option available to you.

7. Select a user to appear on the line key appearance. You can search by first name, last name, and email.

8. Click **Save**.

   The SLA key appears on the list with a green bar indicator. Hover over ⠿ next to each key to drag and drop and rearrange the keys.

9. Click to **Save** the Shared Line Appearance key.

10. Click to **Save** the user.
    You see the new SLA key on your phone once you save the changes in the application. The phone reboots automatically to show the updates. Your SLA keys appear on the phone display, and give you the ability to handle calls for the selected devices.

Edit shared line keys

You can add, edit or delete SLA keys from the Users or Devices pages.

To edit SLA keys from the Users page:

1. Go to **Home > Users**.
2. While editing a user, go to **Voice Basic Settings > Device model > Line key configuration**.
3. Make the required changes and click **Save**.

To edit SLA keys from the Devices page:

1. For a quick and easy access to the Line Key configuration page, go to **Home > Devices**.
2. Find an activated device that supports Line Keys and is assigned to one. Click **View device report**.

3. Click ✎ next to the device that is configured with Line Keys.
4. Make the required changes and click **Save**.

FAQ

Refer to the following frequently-asked questions for more information:

Yes, but we recommend using a BLF instead of SLA key depending on the use case.

Add speed dial keys

8x8 Speed dial keys are used to place a call to the desired destination at the touch of a button. It has the advantage of users not having to remember or enter long telephone numbers into their phones. This is particularly handy for the most frequently-dialed numbers or to quickly dial in an emergency. Users can place calls by pressing pre-determined keys on their phone. You can add as many speed dial keys as your device allows. Speed dials can be added from both 8x8 Admin Console and device.

Features

- Quickly dial out to the most frequently-used numbers.
- Set up quick forwarding rules for the monitored numbers or extensions.
- Dial to internal and external phone numbers at the touch of a button.
- Add an unlimited number of speed dials to your device.
- Use as shortcuts for barge, monitor, whisper, or even log in to a call queue.
- Configure speed dials to custom destinations such as star commands and custom numbers to fully exploit the power of your voice system.

Limitations

- Speed dials cannot be created in the 8x8 Work for Desktop and 8x8 Work for Mobile.
- Cisco phones do not support *, + or # characters in the speed dial configuration.

Set up speed dial keys

You can add a device that supports Speed Dial keys, activate the device, and set up the Speed Dial keys via the Users page.

To add Speed Dial keys:

1. Go to **Home > Users**.
2. Edit or create a user. See how to Add VO Users.

3. Under **Voice Basic Settings > Device model**, select a device that supports Line Keys, and activate it. The Line key configuration link appears next to the device.

> **Note:** The link only appears for devices that support Line Keys, such as VVX 300. Please refer to the list of 8x8 supported phones for Line Keys.

4. Click **Line Key configuration**.
   You find access to three types of keys: **BLF key**, **Speed dial key**, and **Line appearance**.

5. Click **+Speed Dial key**.

6. In **Dial to**, enter a name, phone number, or an extension number. A label is populated in the Label field.

7. Enter or change the **Label**. The label appears on the phone device display and next to the speed dial. The maximum number of characters for the label depends on the device type.

8. Select a **Ring type** for a unique ring tone. When an incoming call comes, the matching key rings differently.

9. Enable **auto divert** to forward your incoming calls automatically, or **auto reject** to reject the incoming calls:

   - **Auto divert**: You can create a speed dial for every target you call often, whether an internal user or an external contact. Auto divert can come handy when you need to divert a call from this speed dial contact automatically. Let's say you have a customer who typically calls you; but you need to transfer him to your colleague. Or, you are an executive and like to send your family calls to you directly, bypassing the auto-attendant. You can set up auto divert on certain numbers, such as a colleague you frequently interact with, to come straight to you as if it was a direct line. You can also specify an external number such as your mobile phone number to diver the incoming call from this speed dial contact. Let's say, you have set up a speed dial to reach your Supervisor. You are traveling and you want to receive the calls from your supervisor on your mobile phone number; you can now key in this number to automatically divert the calls from your supervisor to your mobile number.

   - **Auto reject**: You can create a speed dial for every target you would like to reject. Auto reject allows users to blacklist a phone number so that all calls from that number are automatically dropped.

   > **Note:** Auto divert and auto reject only applies to incoming calls. If you have set up call forwarding rules for a user, those rules takes precedence over the auto reject rule.

10. Click **Save**. The speed dial key appears on the list with a blue bar indicator. Hover over ⠿ next to each key to drag and drop and rearrange the keys.

11. Click to save the speed dial key configuration and the user. The phone reboots automatically to show the updates. The new Speed dial key appears on the phone device. You can also add speed dial keys from the phone device.

Edit speed dial keys

You can add, edit or delete Speed Dial keys from the Users or Devices pages.

To edit Speed Dial keys from the Users page:

1. Go to **Home > Users**.
2. While editing a user, go to **Voice Basic Settings > Device model > Line key configuration**.
3. Click **Speed dial key**, and make the desired changes.
4. Click **Save**.

To edit Speed Dial keys from the Devices page:

1. For a quick and easy access to the Line Key configuration page, go to **Home > Devices**.
2. Find an activated device that supports Line Keys and is assigned to one. Click **View device report**.
3. Click   next to the device that is configured with Line Keys.
4. Make the desired changes.
5. Click **Save**.

FAQ

Refer to the following frequently-asked questions for more information:

You can not only add speed dials from 8x8 Admin Console, but you can add them from the phone device.

To add a speed dial from the phone device:

1. Press ⌂ to display the **Home** view.

2. Go to **Directories > Contact Directory**.

3. Click ⊞ to add a new contact.

4. Enter name, contact number, and label. Label appears next to the speed dial key on the phone display.

5. Enter a number for **Favorite Index**. The Favorite Index determines the location of the key on the phone device display.

6. Save your changes, and press ⌂ again to go back to the main page. The speed dial appears on the phone device.

7. Refresh the 8x8 Admin Console to see the updates.

Configure sidecars

A sidecar is a phone accessory device that attaches to a business desk phone for advanced call handling capabilities. Sidecars simplify monitoring of large number of contacts and management of a high volume of concurrent calls. Using sidecars such as Polycom VVX Expansion Modules, a desk phone can handle additional Busy Lamp Field (BLF) keys and Speed Dial keys. With sidecars, you can accept, screen, dispatch, and monitor calls and reduce the number of lost customer calls, shorten transaction times, and increase the accuracy of call routing. For details, see our content on the complete list of 8x8 phones supporting Line Keys.

For details, see our primary sidecar user guide and our quick reference template guide.

> ![note icon] **Note:** Sidecars only support BLF and Speed Dial keys.

Features

- Increase the number of keys on the physical phone.

- Handle additional BLFs and Speed Dial keys.

- Monitor large number of contacts and manage a high volume of concurrent calls.

- Use to accept, screen, dispatch, and monitor calls.

- Reduce the number of lost customer calls and shortens the transaction times.

- Increase the accuracy of call routing.

- Support 28, 30, and 40 keys sidecars.

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Limitations

Depending on the volume of concurrent calls, Polycom recommends not to add more than 50 BLFs per User. BLF keys require more hardware performance than Speed dials. High call volumes may show performance issues on the phone with sidecars. TLS/SRTP which is enabled by default, can be disabled to further help alleviate any potential performance issues with the physical phone.

Set up sidecars

You can add a device that supports Sidecars, activate the device, and set up Sidecars via the Users page.

To configure Sidecars:

1. Go to **Home > Users**.

2. Edit or create a user. See how to Add VO Users.

3. Under **Voice Basic Settings**, select a **Device model** that support Line Keys, and activate the device.
   The option to configure line keys appears next to the device.

   > **Note:** The link only appears for devices that support Line Keys, such as VVX 300. Please refer to the list of 8x8 supported phones.

4. In the **Phone keys plan** window, click **+Add a sidecar**. The sidecar option appears if the device is connected to a sidecar.

5. Start adding BLF and Speed dial keys in the sidecar. See the number of keys supported for each sidecar. For better performance, we recommend you not to add more than 50 BLFs per user. For paper label sidecars and information on how to print a paper label, refer to the FAQ questions: How do I generate line key information for 40-key sidecars?

6. Save your changes.

7. To delete an existing sidecar, click **x** next to the sidecar.

Edit sidecars

You can add, edit or delete Sidecars from the Users or Devices pages.

To edit Sidecars from the Users page:

1. Go to **Home > Users**.

2. While editing a user, go to **Voice Basic Settings > Device model > Line key configuration**.

3. Make the required changes and click **Save**.

To edit Sidecars from the Devices page:

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1. For a quick and easy access to the Line Key configuration page, go to **Home > Devices**.

2. Find an activated device that supports Line Keys and is assigned to one. Click **View device report**.

3. Click   next to the device that is configured with Line Keys

Set up line key templates

You can set up line keys for each user individually or create a line key template and use it Line key templates allow you to save time and effort by configuring the line keys once and using it for more users or devices as the need comes.

Features

- A template can contain line appearance keys, BLF keys, speed dials, and sidecars.
- You can arrange the keys such as BLF, speed dial, etc. in any order you would like. (with an exception)
- You can apply a new line key template on your device and save the changes every time you are editing.
- When you import a template to a device or sidecar with less keys, the system uses the available keys only. For example, when you import your line key template from a 10-key device to an 8-key device, only the first eight keys will be used on the device.

Limitations

- You cannot import templates in bulk for all users. You need to apply one template at a time.
- Once a template is assigned to a device, there is no connection between the template and the device, therefore, modifying the template does not impact the device configuration. To update a device you need to re-apply the template.

Use cases

If you are an administrator in a company with multiple devices in need of line key configuration, BLF key, and speed dial keys, you know how much time and effort it takes to set up phone configurations on every single device. Using the line keys templates, enables administrators to save their configured keys as a template and quickly copy to other devices.

Create line key templates

You can add a device that supports Line Keys, activate the device, and create or import templates via the Users page.

To create a Line key template:

1. Go to **Home > Users** and click to edit a user.

2. Go to **Voice basic settings,** and click **Line key configuration** next to **Device model**.

3. In **Phone keys plan**, add keys and configure them as needed.

4. Click **Save as template**. The new template is saved in your system and ready to be used for other devices or users.

You can import an existing line key template for a new user or device.

To import a Line key template:

1. Go to **Home > Users** and click to edit a user.

2. Go to **Voice basic settings,** and click **Line key configuration** next to **Device model**.

3. Click **Import from template**. You must have created a template before.

The configuration key template is imported for this user or device.

4. Click to save the phone keys plan and the user.

Access line key templates

You can access, save, edit or delete Line Keys templates from the Users or Devices pages.

To access Line key templates from the Users page:

1. Go to **Home > Users**.

2. While editing a user, go to **Voice Basic Settings > Device model > Line key configuration**.

3. Make the required changes and click **Save**.

To access templates from the Devices page:

1. For a quick and easy access to the Line Key configuration page, go to **Home > Devices**.

2. Find an activated device that supports Line Keys and is assigned to one. Click **View device report**.

3. Click ✎ next to the device that is configured with Line Keys

Set up hot desks

8x8 supports Hot Desking. With Hot Desking, you can turn a device into a shared desk phone and allow other users to use it as their own, but during different time periods. A primary motivation for Hot Desking is cost reduction through space savings. Hot Desking is often found in workplaces with flexible schedules for employees, where not all employees are actually working in an office at the same time or on the same schedules. Employees in such workplaces use existing offices only occasionally or for short periods of time, which leaves offices vacant. By sharing such offices, employees make more efficient use of company space and resources.

Features

- Ability to turn any user's device with a proper license to Hot Desk.
- Ability to log in to a shared phone that immediately behaves like your own extension.
- Ability to make and receive calls on the Hot Desk.
- Ability to check messages on the Hot Desk.
- Providing a more personalized, secure, and convenient phone experience whether traveling to other offices or working a shift at a shared desk.

Limitations

The following limitations are known for Hot Desking:

- The Hot Desk user is not able to use 8x8 Work for Desktop or 8x8 Work for Mobile.
- Turning on Hot Desk capabilities for a device prevents the primary user from making or receiving calls. Only the user logged in as a guest on the device is able to make and receive calls.

- Hot Desk cannot be enabled for:
  - Multi-port devices such as DECT base or ATA terminal unit.

  - Devices that use the shared line appearances in line key configuration.

Use case

Let's say AcmeJets sales employee needs an office for a client meeting but does not otherwise have need of a personal office. A permanent sales work station can be made available to any worker when needed, with employees sharing the station as needed. Another example is when employees need to perform specific tasks at work stations created for those tasks in a test lab. The individual work stations are not set up as personal offices.

How to use hot desk?

To enable Hot Desk for a user:

1. Go to **Home > Users** to create or edit a user profile that is going to be used for Hot Desking.

2. In **Services and permissions**, select a license that supports Hot Desking. See 8x8 available licenses.

3. In **Voice Basic Settings**, select a device and make sure it is activated. The Enable Hot Desk option appears at the bottom of the selection. Note that Hot Deskig is only available on desk phones. If you select a softphone as your device, the Hot Desk option is not available.

4. Click to **Enable Hot Desk**, and **Save**.
   The phone reboots and is ready to be used for Hot Desking. The extension appears as a Hot Desk extension on the phone (in this case, 1077 Hot).

Only users with the appropriate license permissions (X6 or higher) can be BMW admins.

Set up call park extension

With the 8x8 Call Park feature, you can park a call in the cloud while you use your phone to make another call, or inform another employee to pick up the call. Instead of putting the call on hold or forwarding it to voicemail, you can park the call in its own dedicated space on a call park extension while the caller hears hold music. Call Park Extension is similar to placing a call on hold, however, unlike placing a call on hold, you can retrieve the held call from any other phone within the organization.{mf--the same pbx?}

When you park a call, the system announces a parking number which must be communicated to the desired recipient who can then enter the number to retrieve the call. When you set up a call parking extension on a BLF key, you can simply bypass the need to remember and input the call parking number. Instead, simply press the BLF key to park a call. On the recipient phone, the BLF key blinks indicating a parked call. Press the BLF key to retrieve the call.

Call Park Extensions are supported on all 8x8 phones that support Line Keys.

Features

- Experience a faster call routing and better customer experience.
- Park and retrieve calls at the touch of a button without the need to remember a call parking extension number.
- Pick up a parked call via any extension within the organization. {mf--the same pbx?}
- Reserve call park extensions and bind them to BLF keys.
- Keep the parked call on an extension for a maximum of five minutes.
- Ring back the parked call automatically to the person who parked the call, if not answered within 5 minutes. If the ring back is not answered either, the call is transferred to the person's voicemail.

Use case

Let's say we need to set up an efficient call flow In a hardware store with Lighting, Paints, and Lumber departments. When the front desk associate answers a call for Lighting, she parks the call on an extension reserved for Lighting department. The call is then retrieved by an associate in the Lighting department. If you set up a call park extension using a BLF key, the associates can simply press the BLF key to park and retrieve the call without having to remember the parking number. The front desk associate presses the BLF key to park the call for lighting department. The associate in the lighting department presses the blinking BLF key on the phone to retrieve the call.The following illustration shows the plan:

To set up a call park extension, you must first reserve the extension number and then assign the reserved extension to a BLF or speed dial key:

Step 1: Reserve a Call Park Extension Number

You can reserve an extension number for the call park under **Home > Extension Numbers** and bind it to BLF or speed dial later. For example, you can reserve 1234 for the Lumber department and add it to the front desk's phone using BLF. The main front desk associate picks up the phone. The call needs to be transferred to a sales representative in the Lumber department. The front desk associate presses the BLF key to park the call for Lumber department. The sales rep in the Lumber department notices the BLF light blinking on the phone. She presses the BLF key to retrieve the call.

To reserve a call park extension:

1. Go to **Home > Extension Numbers**.
2. Click **+ Reserve Extension Numbers**.
3. Select **Call Park** as your extension type.

4. Enter an **Extension Number**.

5. Enter a **Label** and **Save**.

The extension number appears on the list. You can click   to edit the label. You can now bind it to a user with Line Key Configuration.

Step 2: Assign the Call Park Extension to a BLF Key or Speed Dial

The next step is to assign the call park extensions to a BLF key. In the use case described here, you need to configure three BLF keys on the phone used by front desk associate. For other departments, however, you add only one BLF key, such as **Paints** for the Paints department, **Lumber** for Lumber, and so on.

To bind a call park extension to BLF:

1. From the main menu in 8x8 Admin Console, go to **Users**.

2. While editing a user, click the **Line Key Configuration** link next to the device.

> **Note:** The link only appears for devices that support Line keys. See the list of 8x8 supported phones.

3. In the line key configuration window, click **+BLF key**.

4. Select **Call Park** for **BLF Extension type**.

5. Enter the call park you have reserved in **Call Park to monitor**. The label shows up.

6. To allow call pick up, choose to **Enable call pickup for this monitored extension number**.

7. Click **Save**. The call park appears on the phone device display next to a BLF key with the label.

8. Click **Save** again.

You can also assign a call park to a speed dial key.

To bind a call park extension to speed dial:

1. Go to **Home** > **Users**.

2. While editing a user, click the **Line Key Configuration** link next to the device.

> **Note:** The link only appears for devices that support Line keys such as VVX 300. See the list of supported phones.

3. In the line key configuration window, click **+Speed dial key**.

4. In the **Select a speed dial target** window, in **Dial to**, enter the call park you have reserved. The label shows up. Change it, if desired.

5. Select the **Ring type**. Slide to turn on the **Enable auto divert** and the **Enable auto reject** toggles, if desired.

6. Click **Save**. The call park appears on the phone device display next to a speed dial key with the label.

7. Click to save line key configuration.

You can monitor calls via call park extension using a desk phone.

To park and retrieve calls using Polycom phone's BLF:

1. Receive an inbound call. While on an active call, press the BLF key for the destination.
   For example, in a department store, when the call comes in for Lighting, press the

BLF key for the Lighting department.

The call will be parked and needs to be retrieved by associates in Lighting.

2. Use an intercom call or paging to announce the waiting call.
An associate in the Lighting department retrieves the call by pressing the BLF key. If the call is not answered within five minutes, the call will be diverted back to the front desk associate. If the front desk associate is not available, the call goes to the front

desk answering machine.

Notes:

-To hear the phone ring, select the **Enable call audio tone** check box when assigning the BLF key in Account Manager.

-If the call is not answered within five minutes, the call will be diverted back to the front desk associate. If the front desk associate is not available, the call goes to the front desk answering machine.

You can simply delete a reserved call park extension number that you have no use for, from the list of extension numbers. When you delete a call park extension, the power keys pointing to the extension number become invalid.

To delete a reserved Call Park Extension:

1. Go to **Home > Extension numbers** and find the reserved number for Call Park Extension.

2. Click ⋮ , and select **Delete**.

3. Confirm **Delete**.

Set up call queues

A call queue lines up your callers in a queue while your users or employees are busy with other calls. The queued calls are distributed to your next available user in the order they are received, allowing you to serve your customers promptly, courteously, and efficiently.

When a new call comes into the queue, the call is distributed in priority order to the primary members in the call queue group. A call queue group is a group of agents who will take the calls that come into that queue. The participating members, and their priority within the queue, are defined by the queue administrator when the queue is set up. Each queue can also have secondary members set up to handle overflow calls to the primary group of members. Primary and secondary groups work as follows:

- Agents in the primary extension group are called first (in priority order). When all agents in the primary group are busy, calls in the queue are routed to the secondary members until the maximum number of callers in the secondary queue has been reached.

- When the maximum number of callers in the queue has been reached and all agents in the primary and secondary extension groups are busy, the next caller is forwarded to the queue's voicemail. The maximum number of callers can range from 1 to 20 and is set by the queue administrator.

Calls coming through the queue are distributed on a round robin basis, based on agent availability and which agent took the last call. If all agents on your primary and secondary queue extension groups are busy, and the maximum number of callers in queue has not been reached, the next call that comes into the queue will go to the queue IVR message. Queue administrators can set how often this repeating message plays as the caller waits for the next available agent. If all agents remain busy, this caller hears the hold music, followed by a repeating Queue IVR. At this point, the caller has the option to leave a voicemail in the queue voicemail box or to continue to hold until the next agent becomes available.

Features

- Configure greetings, messages, and hold music for callers while they wait to be served.
- Define the maximum number of calls (up to 20) to wait in the queue.
- Allow users to log themselves in and out of queues, if desired.
- Assign a user to one or more call queues. Users can switch between call queues as needed.
- Allocate primary and secondary member groups. Members must be part of the same phone system, but can come from multiple sites.

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- Allocate multiple phone numbers to a call queue.
- Access a voicemail box for each queue.

Limitation

In a multi-PBX system all the users in one call queue must reside within the same PBX or phone system.

The AcmeHealth clinic receives a high volume of calls from patients seeking to schedule appointments. To ensure timely service to the patients, the clinic creates a dedicated call queue and assigns four primary members and two secondary members for its appointment desk. Callers calling to schedule an appointment are directed to appointment desk representatives via the call queue. Calls wait in the queue, and are offered to the available representatives in the same order they are received. If seven calls come to the queue, the first four calls go to the four agents of the primary group, the next two calls go to the two agents of the secondary group, and the caller seven hears the queue IVR until the next available agent picks up the call.

Since the maximum number of waiting calls in this queue example is 10, calls are automatically forwarded to the queue voicemail if there are 11 or more simultaneous calls in the queue.

Primary Queue Extension Group Example setup with four agents				
Secondary Queue Extension Group Example set up with two agents				
Queue maximum	Set to 10 callers for this example			

Configuring a call queue requires you to create a queue first. You then set up a voicemail and call forwarding for when the calls overflow, establish IVR rules to route the calls, and finally add primary and secondary members to the group to answer the calls.

To set up a call queue:

1. Go to **Home > Call Queues**, and click **+ Create Call Queue**.

2. Enter the **Basic information**, such as call queue's name and site. Call queue automatically inherits the time zone and language specified for the site, unless you specify otherwise.

3. Enter a number for **Maximum calls in queue**. You can have up to 20 calls in the queue at any given time.

4. Enter **Wrap-up time**. The wrap-up time is up to 75 seconds for the current call before accepting the next call from the queue.

5. Enter the **Delay after not answering (maximum 120 seconds)** .
   If an agent does not answer a call, additional calls are not offered to this agent for the maximum time entered in this field. This time gives an unscheduled or emergency break to the user. If the user's phone rings for some time to alert the user and the user does not pick up the phone, chances are that the user is away from his desk. The system gives the user a break to get back to the station.

6. Enter the **Total time to alert a member (Max 30 seconds)**. If a user does not pick up the phone within the time entered, they are assumed unavailable. This option determines the total time a user's phone must ring before the call is moved to another agent or back to the queue.

7. Enable **Allow agents to log in and log out from assigned queues**. If enabled, users can log themselves in and out of queue using the 8x8 Work for Desktop or an IP phone. If disabled, users are automatically logged in to the call queue.

   > **Note:** You can quickly view users login permission in a call queue by checking the call queue's summary. See login permission in a call queue.

8. Scroll down to configure **IVR Message**. The left-side navigation menu allows you to jump to the desired section quickly without having to scroll multiple screens. For details see our content on IVR Messages.

9. Add **Primary members**. You must add at least one user as the primary member. You can search users by first name, last name, or email ID. You can select members from all sites within the same phone system (PBX).

10. Add **Secondary members** (optional). A group of users can be assigned to both a primary and secondary members group. The secondary members can be set up to handle overflow calls from the primary group. If all agents on the primary and secondary groups are busy, and the maximum number of calls in the queue is reached, the next call is forwarded to the queue's voicemail. If you remove a user from the member's list, the user is removed from her assigned queue.

11. Set up a password in **Voicemail settings**. See about Voicemail Settings.

12. Set up **Call forwarding rules**. See about Call Forwarding Rules.

13. Click **Save**.

In the call queue's edit page, scroll down to see **IVR Message**. The left-side navigation menu allows you to jump to the desired section quickly without having to scroll multiple screens. In the IVR messages, set up the following options:

- **Initial Queue Greeting**: The first IVR message is the initial queue greeting which is played when all agents are busy. For example: "All our representatives are busy, please remain on the line and your call will be answered as soon as possible." Click **Change** to select, upload, or record an audio file. If no audio file is selected, the default audio file will be played.

- **Music-on-hold**: You can play a hold music while callers are waiting for the next available agent. If all agents remain busy, the caller hears the hold music, followed by a repeating Queue IVR. At this point, the caller has the option to leave a voicemail in the queue voicemail, or to continue to hold until the next agent becomes available. See how to set up a music on hold. Click **Change** to select, upload, or record an audio file. If no audio file is selected, the default audio file will be played.

- **Repeating Queue Message**: You can play a repeating queue messages at intervals while the caller is waiting for the next available agent. For example: "Your call is important to us. It will be answered in the order it was received, please continue to hold or press 2 to leave a message." At this time, the caller has the option to leave a voicemail in the queue voicemail or to continue to hold until the next agent becomes available.

  You can enter a number for **Repeat queue message interval**. The maximum time

between the messages is 45 seconds. While the caller waits in the queue, they hear the message repeated every 45 seconds. Click **Change** to select, upload, or record an audio file. If no audio file is selected, the default audio file will be played.

- **Allow callers to leave voicemail**: If enabled, callers can dial 2 to leave a voice messages while waiting in the queue.

For call queue **Voicemail Settings**, set up the following options:

- **External voicemail greeting**: Greeting played for people outside the company. In the absence of a custom external voicemail greeting, the default audio greeting is played.

- **Internal voicemail greeting**: Greeting played for people inside the company. In the absence of a custom internal voicemail greeting, the default audio greeting is played.

- **Notification**: choose one of the following notification options:

  - **Attachment only and delete original voicemail** - Set up a group email address to receive voicemails, then delete it from the service. You don't have to enable the access of any group member to voicemail (group members no longer receive voicemails in their email boxes because they always will be empty).

  - **Disable Notification** - Set up a group member to receive voicemail notifications. At least one group member should have voicemail access enabled (because voicemails are built up in the box).

  - **Attachment only** - Set up a group member to receive voicemail notifications. At least one group member should have voicemail access enabled (because voicemails are built up in the box)

- - **Notification only** - Set up a group member to receive voicemail notifications. At least one group member should have voicemail access enabled (because voicemails are built up in the box)

> **Note**: When you try to disable all the group members, and you choose the **Attachment only and delete original voicemail** option, you don't have to enable the access of any group member to voicemail. A warning

notification displays for other options, and you must enable at least one member to have voicemail access.

- **Email**: enter the email address to be associated with the voicemail.
- **Voicemail access PIN**: Set up the access PIN for the call queue's voicemail box. The members need the password to access the queue's voicemail. The password is numeric-only, and must contain 6 to 15 non-sequential digits. You can direct calls to the call queue's voicemail by editing the call forwarding settings. To access the call queue voicemail, you have to be a queue's member. Dial <555> from your assigned number, or <500> from any other phone to access the voicemail.

To enable group voicemail notifications:

1. Go to **Home** > **Call Queues**, and click **Voicemail settings** in the left menu.
2. Select the desired call queue.
3. Under **Voicemail settings**, select the desired option from the **Notification** list.
4. Attach an email address where the notification will be sent.
5. Click **Save**.

To set up a voicemail access PIN:

1. Go to **Home** > **Call Queues**, and click **Voicemail settings** in the left menu.

2. Under **Voicemail access PIN**, enter and confirm the voicemail access PIN for the call queue's voicemail box.

To access call queue voicemail and options over the phone:

1. From any extension in your 8x8 system, dial 500.

2. Enter the call queue extension number and press #.

3. Enter the call queue voicemail password and press #.

4. From the Main Menu:

   - Press **1** to listen to your messages.

   - Press **2** to change your greeting.

   - Press **3** to manage user preference options: change voicemail password, call waiting preferences, busy handling, ring no answer handling, Internet outage routing, and email notification preferences.

   - Press **4** to establish or change call forwarding rules. Options include: listen to, set, change, or cancel call forwarding rules.

   - Press **5** to set a specific greeting for business hours, after business hours, lunch time, meeting, weekend, and vacation.

   - Press **6** to enable or disable Announcement Only mode (e.g., your vacation greeting).

   - Press **9** to exit voicemail.

You can disable the user's voicemail access by clicking   next to a member and select **Disable voicemail access**.

You can set up call forwarding rules for a call queue when the Internet connection is down, the queue is full, or the queue has reached its maximum capacity. You can also forward the calls when all agents are logged out, or have a server side Do Not Disturb (DND) status.

To edit the call forwarding rules:

1. Go to **Home > Call Queues** and create or edit a call queue.

2. Open **Call forwarding rules**.

3. Click ✎ next to a rule.

4. You can forward incoming calls to **Voicemail** or **Selected user or service**. Select another user from the list or transfer the call to a custom target. The custom target can be an extension number or a telephone number. For example, you can enter a short number, such as 7878, without the dial plan in the target selector and save. The custom number appears in the call forwarding rules.

5. Click to save the call queue.
   If you do not forward the calls, the callers can only hear a ring tone. See FAQ: How do I access my call queue voicemail?

Administrators can monitor the call queue and add members when needed. They can

easily log in users to a call queue or log them out from within 8x8 Admin Console.

To log a user in and out of call queues:

A. Go to **Home > Call Queues**.

B. Click ✏️ to edit a call queue.

C. In the **Primary members** or **Secondary members** list, click ⋮ next to the member you want to log in to this queue, and select **Log in to queue** or **Log out from queue** as applicable.

You can quickly check a call queue's information by opening the call queue's Info Panel.

To view call queue summary information:

1. Go to **Home > Call Queues**.
2. Click a call queue to open the call queue's Info Panel.
3. You can check the PBX, site, extension number, primary and secondary members, users permission to log in and out of the queue, call forwarding rules, and more.

FAQ

Refer to the following frequently-asked questions for more information:

To choose whether you want to use call queues or ring groups, you should see how you want your calls to be handled once all user extensions are busy:

- A user is always logged in to the ring group, but queues allow the user to log out.

- When a call comes in to a ring group, it rings the phones in the group as per the group configuration. A busy phone is temporarily out of the group. When all members in the group are busy, the ring group forwards the call to voicemail or another phone number as specified. A queue, however, keeps callers waiting in the queue even when all members in the queue are busy handling other calls. When the queue has reached capacity or when no users are logged into the queue, a queued call is forwarded to voicemail or another phone number as specified.

- Music on hold is used in queues, whereas ring groups use Ring Back music.

- To edit a call queue, go to **Home > Call Queues** and click next to the desired call queue.

- To delete a call queue, go to **Home > Call Queues** and click next to the desired call queue.

While editing a call queue, scroll down to **Voicemail**, and click **Reset Access PIN**. Enter a new password, and **Save** to change the call queue's voicemail password.

You need to upload an initial call queue greeting:

1. While creating or editing a call queue, click **IVR Message** > **Queue Greeting**, and click **Change**.

2. In the **Audio files** window, upload a file or record your greeting via phone. You can enter a phone number or an extension number and save. The system calls the specified number and prompts you to record a new audio.

3. Click **Save**.

If call forwarding is enabled and the secondary members are also selected, calls are forwarded to the secondary members of the queue first, and then to the call queue voicemail. Only members of the queue can access the voicemail.

To enable call forwarding:

1. While creating or editing a call queue, scroll down to **Call forwarding rules**.

2. Enable **Forward all calls**.

3. In the **Forward all calls** window, under **Forward calls to** select **Voicemail**, and **Save**.

You can upload and select your desired hold music for the queue.

To upload new music on hold:

1. While creating or editing a call queue, go to **IVR Message** > **Music On Hold** and click **Change**.

2. In the **Audio files** window, upload a file or record your audio via phone, and **Save**.

You can choose a time that must pass between calls, allowing users to wrap up the previous call.

1. While creating or editing a call queue, go to **Basic Information.**

2. Under **Wrap-up time**, enter the time available for a member to wrap up after a call,

before accepting the next call from the queue.

3. Click **Save**.

- **The queue is full**: You can forward calls to voicemail, another call queue, ring group, or another user.
- **The agents are logged out or in the Do Not Disturb (DND) state**: You can forward calls to voicemail, another call queue, a ring group, or another user.
- **There is an outage**: You can forward calls to voicemail, another call queue, a ring group, or another user.

1. While editing a call queue, go to **IVR Messages > Music On Hold** and click **Change**.

2. Click ⬚ next to the audio file that you like to delete. If you do not choose another audio file before deleting the currently selected one, the default audio file will be selected.

If you enable **Allow agents to log in and log out from assigned queues**, users can log themselves in and out of the queue when working with 8x8 Work for Desktop or an IP phone. If you disable the above option, users are automatically logged in to the call queue they are a member of. Users must log out of the 8x8 Work application to log out of the call queue.

To access call queue using 8x8 Work for Desktop:

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1. Log in to the 8x8 Work for Desktop, and click in the header.

2. In the list of call queues, click to log out of the call queue.

3. Click **Login** to log back in the call queue and receive calls.

You can force a member to log out from a queue. Let's assume the user has left the office for the day, but forgot to log out from the queue.

1. Go to **Home > Call Queues**,

2. While editing a call queue, go to the primary or secondary members list where that user belongs to, click next to the desired user and select **Log out from queue** to force the user to log out of the queue.

You can check the users login permission in a call queue by going to the call queue's Info Panel.

To view user login permission in a call queue:

You can view user login permission at a glance:

1. Go to **Home > Call Queues**.

2. Click a call queue to open the call queue's Info Panel.

3. Check the status to **Allow agents to log in and log out from assigned queues**:

   - **ON:** The agents can log themselves in and out of their assigned queues. This feature can help agents to log out temporarily when they must be away from their desk.

   - **OFF:** The agents cannot log themselves out of their assigned queues. Use this option to automatically log in your agents to the queue when they become available. The agents can log in to 8x8 Work for Mobile, 8x8 Work for Desktop, or make

themselves available from the 8x8 Work for Desktop.

To access call queue voicemail and options over the phone:

1. From any extension in your 8x8 system, dial 500.

2. Enter the call queue extension number and press #.

3. Enter the call queue voicemail password and press #.

4. From the Main Menu:

   • Press **1** to listen to your messages.

   • Press **2** to change your greeting.

   • Press **3** to manage user preference options: change voicemail password, call waiting preferences, busy handling, ring no answer handling, Internet outage routing, and email notification preferences.

   • Press **4** to establish or change call forwarding rules. Options include: listen to, set, change, or cancel call forwarding rules.

   • Press **5** to set a specific greeting for business hours, after business hours, lunch time, meeting, weekend, and vacation.

- Press **6** to enable or disable Announcement Only mode (e.g., your vacation greeting).

- Press **9** to exit voicemail.

Set up Single Sign-On for 8x8 Admin Console

Single Sign-On(SSO) is a session and user authentication service that permits a user to use one set of login credentials, such as name and password, to access multiple applications. The service authenticates the end user for all the applications the user has been given rights to and eliminates further prompts when the user switches applications during the same session. Customers with identity management systems such as Google SSO, Microsoft Azure AD, Okta, or any SAML provider require their employees to authenticate to 8x8 apps using their company ID instead of an 8x8 username and password.

With support for Federated SSO, users can log in to 8x8 applications through their company's identity and security system.

Features

- Easy set up by going to user's profile in 8x8 Admin Console.

- No need to remember or enter 8x8 Contact Center user credentials.

- Reduce 8x8 Contact Center sign-in time.

- Improve security: user credentials do not need to be stored in 8x8 Contact Center.

- Enhance user experience: users can seamlessly sign in to 8x8 Contact Center from other applications.

Identity mapping

Ideally, the system maps each company user to an 8x8 user via the 8x8 username. If your company's 8x8 usernames are not unique email addresses, you have to populate either of these new 8x8 user attributes via 8x8 Admin Console.

- For SAML SSO: Federated ID
- For Google SSO: Google ID

Configure federated SSO

Configuring access to 8x8 applications via Federated SSO involves:

Security Assertion Markup Language (SAML) allows identity providers to pass authorization credentials to service providers. SAML simplifies federated authentication and authorization processes for users, identity providers, and service providers such as 8x8, Inc..

We do not cover this step here since the process varies among the identity and security service providers. Check with your company administrator to find out the service provider adopted by your company. The process is typically managed by your administrator.

- **For Okta**: Search for **8x8 Inc** in the Okta Application catalog and add it. Follow the SAML 2.0 setup instructions provided for 8x8 users with matching Okta usernames. For 8x8 users without matching Okta usernames, the Federated ID is populated in 8x8 Admin Console.

- **For OneLogin**: Search for **8x8** in the OneLogin Application catalog. Under **Configuration > Connectors**, select **Connector Version: SAML 2.0**.

- **For Azure AD**: Search for 8x8 in the Azure AD Enterprise App Gallery.

The 8x8 Work administrator must set up Single Sign-On and specify the identity provider used by the company. To set up SSO, go to **Home > Identity and Security** and select an identity provider such as Google SSO, Microsoft Azure AD, and, Okta, or other SAML SSO provider:

Allows users to use a Google ID to log in to 8x8 applications.

To configure Single Sign-On for Google users:

1. Go to **Home > Identity and Security**.
2. Select **Single Sign on (SSO)** as your authentication method. 8x8 Username and Password is also selected by default. You can choose to log in with 8x8 username, Single Sign-On, or both.

3. Enable **Google** as your SSO provider.

4. **Save** your changes.

Allows users to log in to any 8x8 application using their corporate
Azure AD credentials.

To configure Single Sign-On for Microsoft Azure AD users:

1. Go to **Home** > **Identity and Security**.

2. Select **Single Sign on (SSO)** as your authentication method.

3. Select **Microsoft Azure AD** as your SSO provider.

4. Enter a user authentication URL provided by Identity Provider
   (IDP) in the **Sign-in page URL** field.

5. Enter a user sign out URL provided by IDP to end the IDP
   session in the **Sign-out page URL** field. The 8x8 app calls
   this URL after you log out of the 8x8 app. If your IDP can
   redirect to another URL after it ends the IDP session, you
   should append the variable string <{8x8Logout}>, which inserts
   the 8x8 login URL so the user can log back in later.

6. Enter a provider URL/URN in the **IDP Issuer URL/URN** field. This is also known as an IDP identifier URL/URN.

7. Download the SAML signing certificate from Azure AD (Base64 format) then click to attach it in the **Certificate in use** field.

8. Optionally (if you want to enable user provisioning via this integration), swipe the **User Provisioning Integration (SCIM)** toggle to to automate employee onboarding & offboarding by having the users in your enterprise directory synchronized into Admin Console.

9. Select **Microsoft Azure AD** as user provisioning to display the **8x8 URL** and **8x8 API Token** fields:

   ○ Click [icon] next to **8x8 URL** to copy this URL to your clipboard. You need to paste this URL into the properties of your 8x8 Azure AD application.

   ○ Click the [icon] next to **8x8 API Token** to copy this URL to your clipboard. You need to paste this URL into the properties of your 8x8 Azure AD application.

10. Under **Advanced settings**, select the user(s) that can be retrieved by your identity provider.

11. Click **Save**.

Allows users to use the Okta Federation ID to log in to 8x8 applications.

To configure Single Sign-On for Okta users:

1. Go to **Home** > **Identity and Security**.

2. Select **Single Sign on (SSO)** as your authentication method.

3. Select **Okta** as your SSO provider.

4. Enter a user authentication URL provided by Identity Provider (IDP) in the **Sign-in page URL** field.

5. Enter a user sign out URL provided by IDP to end the IDP session in the **Sign-out page URL** field. The 8x8 app calls this URL after you log out of the 8x8 app. If your IDP can redirect to another URL after it ends the IDP session, you should append the variable string <{8x8Logout}>, which inserts the 8x8 login URL so the user can log back in later.

6. For Okta, the sign out URL may be **https://YOUR_ COMPANY.okta.com/login/signout?fromURI= {8x8Logout}** .

7. Look for a **Certificate in use**. To locate the certificate file (*.cert, *.cer or *.crt), click **Click to attach**. Your identity and security system uploads the certificate file. The certificate file is validated and notifies you of any errors.

8. Optionally (if you want to enable user provisioning via this integration), swipe the **User Provisioning Integration (SCIM)** toggle to to automate employee onboarding & offboarding by having the users in your enterprise directory synchronized into Admin Console.

9. Select Okta as user provisioning to display the 8x8 URL and 8x8 API Token fields:

   - Click [icon] next to **8x8 URL** to copy this URL to your clipboard. You need to paste this URL into the Okta app's API integration section.

   - Click [icon] next to **8x8 API Token** to copy this URL to your clipboard. You need to paste this URL into the Okta app's API integration section.

10. Under **Advanced settings**, select the user(s) that can be retrieved by your identity provider.

11. Click **Save**.

Allows users to log in to 8x8 applications by signing in via any SAML provider of their choice.

Note: If your SAML provider requests for an 8x8 URL, use https://sso.8x8.com/saml2

To configure Single Sign-On for other SAML SSO Provider:

1. Go to **Home** > **Identity and Security**.

2. Select **Single Sign on (SSO)** as your authentication method. 8x8 Username and Password is also selected by default. You can choose to log in with 8x8 username, Single Sign-On, or both.

3. Select **Other SAML SSO Provider** as your SSO provider.

4. Enter a user authentication URL provided by Identity Provider (IDP) in the **Sign-in page URL** field to redirect users when signing in the system.

5. Enter a user sign out URL provided by IDP to end the IDP session in the **Sign-out page URL** field. To redirect users when signing out the system. The 8x8 app calls this URL after you log out of the 8x8 app. If your IDP can redirect to another URL after it ends the IDP session, you should append the variable string <{8x8Logout}>, which inserts the 8x8 login URL so the user can log back in later.

6. Enter an IDP Issuer URL/URN in the IDP Issuer URL/URN field. This is also known as an IDP identifier URL/URN.

7. Download the SAML signing certificate and click to attach it in the **Certificate in use** field.

8. Optionally (if you want to enable user provisioning via this integration), swipe the **User Provisioning Integration (SCIM)** toggle to to automate employee onboarding & offboarding by having the users in your enterprise directory synchronized into Admin Console.

9. Select **Other SCIM Provider** as user provisioning to display the **8x8 URL** and **8x8 API Token** fields:

- ○ Click ⧉ next to **8x8 URL** to copy this URL to your clipboard. You need to paste this URL into the properties of your SCIM system.

- ○ Click ⧉ next to **8x8 API Token** to copy this URL to your clipboard. You need to paste this URL into the into the properties of your SCIM system.

10. Under **Advanced settings**, select the user(s) that can be retrieved by your identity provider.

11. Click **Save**.

This step is optional. If your company does not use unique email addresses for 8x8 usernames, then you must map 8x8 Work users to their Federation ID (for SAML) or Google ID (for Google) in the user records.

You have three options for adding/updating the Google ID/Federation ID in user records:

- Provide the Google ID/Federation ID in the CSV file during bulk user creation only.
- Provide the Google ID/Federation ID when a single user is created manually.
- Provide the Google ID/Federation ID when editing a single user manually.

To define Federation ID or Google ID in a user record:

1. Go to **Home > Users**.
2. Select a user record to edit. Based on the choice of the identity provider, the corresponding mapping field shows under **Single Sign-On (SSO)**:
   - For Okta and SAML, the Federated ID field is available. Populate the Federated ID.
   - For Google, the Google ID field is available. Populate the Google ID.
3. **Save** your changes.

You can also define Federated ID or Google ID while creating users in bulk.

To define Federation ID or Google ID while creating user records in bulk:

1. Go to **Home > Users**.
2. Click **Bulk Upload**.
3. Download the advanced user template in the CSV format. The template opens in Excel.
4. Look for columns **User.FederationID** and **User.GoogleID**, add the user data, and save the CSV file.
5. Go to the Users page in 8x8 Admin Console. Click **Bulk Upload**.
6. Drag and drop the CSV file and click **Save**.

Sign in using Federated SSO

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

Desktop.

1. In the login screen, click **Use Single Sign On**.

The SSO login prompt opens.

2. Enter your 8x8 username or company email for validation.

3. Click **Continue** to view your SSO options.

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

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

5. When prompted, click **Allow** to enable Adobe Flash Player settings to access your camera and/or microphone.

1. If you selected **Log in using SAML**, your company's identity provider login page opens.

> **Note:** If you log in using Okta or Centrify, the login page opens in a new browser tab instead of in the application window. Until you log in, the application window reads **Login from browser...**.

2. Enter the credentials to log in to the identity provider.

   The 8x8 application launches.

1. If you selected **Log in using Google**, the Google login page opens.

2. Enter your company Gmail address and password.

3. Click **Allow** to grant 8x8 SSO access to your Gmail profile.

You are now authenticated to your 8x8 app. The application launches.

Multi-Factor Authentication (MFA)

To ensure security standards, 8x8 apps now enforce multi-factor authentication (MFA) for all 8x8 administrator accounts.

To be able to log in to an 8x8 admin account, an 8x8 Admin Console admin must enable Multi-Factor Authentication (MFA) first, and only then an 8x8 admin will be able to:

- Log into 8x8 admin accounts by using Multi-Factor Authentication (MFA)
- Change the multi-factor authentication method and get backup codes

Enable Multi-Factor Authentication (MFA)

Multi-factor authentication adds an extra layer of security to protect your 8x8 user accounts. 8x8 supports different second authentication factors:

- Authenticator apps, such as Google Authenticator, Authy, Okta Verify
- E-mail
- SMS
- Backup codes

> **Note**: Once the customer administrators opt to make MFA mandatory for their users, they will enable MFA for all users, company wide. It is not possible to enable it for individual users.

To enable MFA:

1. In the 8x8 Admin Console go **Home** > **Identity & Security**.
2. In the **Identity & Security** page, under **8x8 Authentication**, expand Advanced password settings and select **Multi-factor authentication for all users** toggle On to enable mandatory MFA for all users.
3. Slide the cursor to set up the wanted frequency.
4. Click **Save**.

All users will now be required to configure a second factor during the next login.

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> **Note**: This configuration only applies to logins using the 8x8 Authentication. Users logging in with organizational credentials via Single Sign-on Integration (e.g, Okta, AzureAD) are not prompted for 8x8 multi-factor.

To find more details and how this configuration works, read here.

Log into 8x8 admin accounts by using Multi-Factor Authentication (MFA)

After the MFA was enabled, during the first login, admins have to configure their second factor before logging into their 8x8 admin accounts.

To log in to your 8x8 admin account:

1. Navigate to the login page and enter your 8x8 admin credentials and click **Login**.

2. After the MFA is enabled, during the first login, configure the two-factor authentication for your admin account. Choose one of the available option: **Authenticator apps**, **SMS**, **E-mail**, **Backup codes**, and click **Continue**.

3. Enter the verification code and click **Verify**. Once configured, users are logged in as normal.

4. Optinaly: During the subsequent login, users can choose to not be prompted for the second factor on the same device for 90 days.

> **Notes**:
> - If you are using a different browser, clearing browser cookies, or using incognito mode you have to authenticate by MFA even if the box was checked.
> - If you choose to use the Authenticator app, during the subsequent login, a QR code displays and you can install Google Authenticator on your mobile device to generate the time-based one-time password protocol.

Change multi-factor authentication (MFA) and getting backup codes

If you want to use other MFA method:

1. From the Application Panel (apps.8x8.com), on the upper-right corner, click **User Profile** ⌄ menu and click **Settings** ⚙.

2. In the **Multi-factor authentication settings** window, you can add/change/remove authentication methods.

> **Important!** Once an administrator enables the MFA method, users must have at least one method enabled at all times.

3. Once you set up your MFA method(s) you want to use to log in to your 8x8, close the window and go back to the **Application Panel** (apps.8x8.com) and select **8x8 Admin Console**. Now, you can use any MFA method you set up to log in to your admin account.

4. To ensure continued access, even in the event that a user loses access to their second factor, it is recommended that users get backup codes and store them somewhere secure. These one-time-use codes can be entered during the login flow in place of SMS, E-mail, or Authentication App. To enable these, click + Add another and choose Backup Codes.

5. Once you set up your MFA method(s) you want to use to log in to your 8x8, close the window and go back to the Application Panel (apps.8x8.com) and click the 8x8 Admin Console app. Now, you can use any MFA method you set up to log in to your admin account. To find more details and how this configuration is work,, read Log into 8x8 admin account by using MFA

> **Notes**:
> - To ensure continued access, even in the event that a user loses access to their second factor, it is recommended that users get Backup Codes and store them somewhere secure. These one-time-use codes can be entered during the login flow in place of SMS, E-mail, or Authentication App. To enable these, go to the **Multi-factor authentication settings** window, and click **+ Add another** > **Backup Codes**.

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secondary admin
denisa.piteiu@8×8.com

Log out

Password security

Settings

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Multi-factor authentication settings

To add an additional layer of security when
signing in, please configure two-factor
authentication.

Currently active:

SMS (**+40******957**)

Email (**den***************com**)

+ Add another

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Set up multifactor authentication

To add an additional layer of security when
signing in, please configure two-factor
authentication.

○ Email
○ SMS
◉ Backup codes

Continue

Settings

Set up 8x8 Authentication

8x8 Password Policy **8x8 Authentication** defines a mechanism for securing user accounts. Administrators can define a set of password rules for enhanced security. The rules, set by administrators, encourage users (administrators, end-users, agents, and supervisors) to employ strong passwords, and ensure proper usage and account protection.

> **Note**: The **8x8 Authentication** applies to authentication via 8x8 login credentials only. They do not apply to Single Sign-on integration with Identity providers such as Okta or Microsoft Azure AD.

Features

- Timed password expiration forcing a periodic password change.
- Password history to remember a specified number of previously used passwords which prevents re-use.

- Minimum password length of 8-25 characters.

- Password complexity requirements, such as a mix of alphanumeric characters or a mix of upper and lowercase alpha with numeric characters. Special characters can be optional.

- Invalid login attempts locking users out temporarily.

- Account lockout for a specific time or until reset by the administrator in case of invalid login attempts.

- Configure Multi-Factor Authentication challenge frequency for all users. As an admin, you can set up to check MFA on a user device every selectable x days, up to 90 days.

Set up 8x8 Authentication

To access and set up 8x8 Authentication:

1. Log into the 8x8 Admin Console.

2. From the menu select **Identity and Security**.

3. Under **8x8 Authentication** , enable and select a suitable value for the following options:

> **Note**: By default, all options are disabled except the password complexity and minimum password length.

Password Policies	General Description	Policy Options
Password complexity requirement	Defines if a password must be set with a certain complexity. Must mix upper and lower case alpha and numeric May contain symbols (optional)	- Must mix upper and lower case alpha and numeric - May contain symbols (optional)
Minimum length	Defines a minimum length for a password. Restricts agents from choosing a password less than the specified length. > **Note**: By default, the minimum length is 8 characters long. Minimum of 8-25 characters	Minimum of 8-25 characters

Password Policies	General Description	Policy Options
Password expires (In increments of 30 days) If disabled, passwords do not expire.	Defines how long a password is alive. After the specified duration, the password expires and needs to be changed.	• 30 days • 60 days • 90 days • 180 days • 360 days
Enforce Password History If disabled, no passwords are remembered	Defines the number of previous passwords (or no passwords) to be remembered by the system. It prevents users from using the previous passwords when creating a new one.	1-10 passwords remembered
Invalid login attempts If disabled, invalid login attempts will not lock you out.	Defines the maximum invalid login attempts before the system locks users out. 1-10 characters	1-10 attempts
Lockout duration indefinitely. If disabled, the user remains locked out until the password is reset.	Defines the lockout duration before a user is allowed to try to login again. **Note**: You must set a lockout duration if you have set invalid login attempts failing which users will be locked out	1-60 minutes
Configure the Multi-Factor Authentication (MFA) challenge frequency for all users	Configure the recheck MFA on a user device every selectable x days.	• Minimum value - Always (check MFA at every login). • Maximum value - 90 days (default value).

4. Save the settings.

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User Groups feature

The new **User Groups** feature allows admins to limit the scope of access in specific role assignments by giving customers more segmented access to data, such as call recordings access.

For example, supervisors can only see recordings related to those groups they are responsible for and the members who belong to them.

> **Note**: Each user can belong to only one user group at a time.

Based on the user groups, admins can scope role assignments for recordings to a limited group of users:

- Set up user groups
- Assign members to a specific user group
- Create new permissions and role assignments based on user groups
- Limit users access to recordings

Features

- Create role assignments for accessing call recordings that are scoped to recordings from specific groups of users.
  - **View groups and their members** - allows members only to view groups and their members.
  - **Manage membership only** - allows users to view and edit groups and only to add members to groups.
  - **Manage groups and their members** - allows users to view, edit or delete groups and to add or remove members from groups.
- Provide data access control to call recordings for a specific group of users.

User Groups overview

Admins can now create role assignments for accessing call recordings that are scoped to recordings from particular groups of users:

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- **Manage user groups** - Through the new **Work Groups** > **User Groups** section, admins can:

  - Search, create, edit, and delete user groups in Admin Console

  - Search user groups by group name

  - Download the user groups report in a CSV format

  - Add, delete or move members to another group

  - Edit members in bulk - move users to another group or remove users from this group

- **Assign a user to a user group from the Users page** - As an admin, you can assign a user to a specific group while creating or editing a user.

- **Manage new permissions and role assignments based on user groups** - Through the **Roles & permissions** page, you can create roles based on the following new permissions:

  - **View groups and their members** - allows users to view groups and their member permissions.

  - **Manage membership only** - allows users to view groups and add or remove members to/from a group.

  - **Manage groups and their members** - allows users to view, add, edit or delete groups and to add or remove members to/from groups.

- Provide limited data access control for the Storage application - As an admin with permissions granted for the Storage app, which gives access to call recordings, you can now provide a limited data access control for the Storage Admin and Storage API roles. The Storage filter is visible on the Role Assignments page only if the user has the appropriate permissions for the Storage app.

- Handle user access to recordings - You can now assign limited access for recordings based on specific user groups.

  Depending on the permissions and scope(s) granted, users can see:

  - Only the recordings for users belonging to a specific group.

  - The recordings for users belonging to all groups.

  - The recordings for users belonging to that particular site (cluj) and all groups.

Set up user groups

User groups help admins limit the scope of access in specific role assignments. Admins can now create role assignments for accessing call recordings that are scoped to recordings from particular groups of users.

Note: Each user can belong to only one user group at a time.

Through the new **Work Groups** > **User Groups** section, admins can:

As an admin, you can create role assignments for accessing call recordings that are scoped to recordings from specific groups of users.

To create a user group:

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1. From the **Menu** ☰, go to **Work Groups** > **User Groups**.

2. On the **User Groups** page, click **Create User Group** ➕ in the upper-right corner.

3. Under **Group details**, enter the group name and a short description. The group name is mandatory to create your new user group.

4. Click **Add member** 👤⁺ to assign users to that group.

5. Click **Create group**.

> **Note**: As an admin, you can assign a user to a specific group while creating or editing a user.

While creating or editing user groups, you can add user(s) to a group.

To add a user from a group:

1. From the **Menu** ☰, go to **Work Groups** > **User Groups**.
2. On the **User groups** > **Create** or **Edit** page, click **Add member**.
3. In the **Add members** window, add the desired member's name, number or email.

> **Note**: Users who are already members of another user group are highlighted. You can continue to move them to this group or remove them if you still want to belong to the current group.

4. You can search and find users by their first name, last name, number or email. Press enter to add it to the list. Click Add members.
5. Save your settings.

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While creating or editing user groups, you can remove a user from a group whenever necessary.

To remove a user from a group:

1. From the **Menu** ▤, go to **Work Groups** > **User Groups**.

2. On the **User groups** > **Edit** page, click **Remove user** in the desired user row and conform. The user no longer belongs to any user groups.

3. Save your changes.

> **Note**: You can remove multiple members from a group by using the bulk editing capability.

While creating or editing user groups, you can move users from one group to another in one action.

To move a user to another group:

1. From the **Menu** ▤, go to **Work Groups** > **User Groups**.

2. On the **User groups** view page, click **Edit** ✎ in the desired group row from the list view .

3. While editing user a user group, click **Move user** ⚲ in the desired user row.

4. Select another group to assign the user to and click **Move user**.

5. Save your changes. The user no longer belongs to this user group and belongs now to the group you selected.

> **Note**: Using the bulk editing capability, you can move multiple members to another group.

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You can edit a user group whenever necessary. You can change the group name or description and manage members - add, remove or move members to another group.

To edit a user group:

1. From the **Menu** ☰ , go to **Work Groups** > **User Groups**.

2. On the **User groups** view page, click **Edit** 🖊 in the desired group row from the list view .

3. Make your changes and save.

While editing a user group, you can use the bulk editing capability to handle multiple members in one action by using:

- **Move users** - To move multiple members in another group in one action
- **Remove users from this group** - To remove multiple members from this group.

To move multiple users to another group:

1. While editing a user group, select the members you want to move from this group.

2. Click **Bulk actions** > **Move users**.

3. Select another group to assign the selected members to and click **Move users**. The selected users no longer belong to this user group, and they belong now to the new group.

To remove multiple users from a group:

1. While editing a user group, select the members you want to move from this group.

2. Click **Bulk actions** > **Remove from this group** and confirm. The selected users will

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no longer belong to any user group.

> **Note**: Deleting a group with assigned members requires you to reassign the group members to another group or to remove it from that group.

To delete a user group:

1. From the **Menu** ▤ , go to **Work Groups** > **User Groups**.

2. On the **User groups** view page, in the desired group row from the list view, click

   Delete 🗑 and confirm your action.

3. If the user group has members assigned, select a group to move all the members to that group and click **Delete & move members**. Optionally, select **None** to remove all the members from this group.

4. Click **Delete** to confirm the deletion.

> **Note**: Optionally, you can move users individually to different groups and then delete the user group.

If your 8x8 Contact Center has numerous user groups, tracking them in a single scrollable list may be challenging. You can narrow your search by group name, and press **Enter**.

Clear your search box and press **Enter** to display all the available user groups.

You can download a list of all the groups in the user groups list and save it for further use.

To download a user groups report in a CSV format:

- On the **User Groups** page, click Download report to generate a CSV report detailing all the available user groups from the list.

Group.Name	Group.Members	Group.Created
Admins groups	4	9/27/2023 6:53
Sales group	5	9/27/2023 6:52
TechPubs ug	4	9/27/2023 5:44
TW CJ	5	9/27/2023 5:43
TW groups	0	9/29/2023 15:39

As an admin, you can assign a user to a particular group directly from the Users page while creating or editing a user.

To assign a user to a specific user group:

1. From the **Menu** ⬛ ,, go to **Work Groups** > **Users**.

2. Under **Basic Information**, in the **User Groups** list, select the group to which that user belongs.

3. Save your changes.

> **Note**:
> - From the **Account Settings** (user profile) page, users can only view which user group they belong to but cannot modify it.
> - From the **Users page**, administrators can select which user group a user (including themselves) belongs to only when creating/editing users.
> - From the **User**s page, while editing users in bulk, the **User Group** selector is not visible, and the admins cannot assign those users to a user group.

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Through **Roles & permissions**, you can create roles with limited permissions:

- **View groups and their members** - allows members only to view groups and their members.

- **Manage membership only** - allows users to view and edit groups and only to add members to groups.

- **Manage groups and their members** - allows users to view, edit or delete groups and to add or remove members from groups.

To create a new role with limited access based on user groups while creating or editing a role:

1. From the **Menu** ☰ , go to **Roles and Permissions** > **Roles**.

2. On the **Roles** page, click **+Create Role** in the upper-right corner.

3. Under **Permissions**, select one of the new permissions from the list on the new page to enable users to manage user groups.

4. Save your settings.

Assign roles with limited access based on users group for the Storage application

As an admin with permissions granted for the **Storage** app, you can now provide limited data access control based on user groups for both the **Storage Admin** and **Storage API** roles

To assign a new role for the Storage Admin scope:

While assigning roles from the **Role Assignments** page, you can now assign user groups to the **Storage Admin** role.

1. From the **Menu** ▤ , go to **Roles and Permissions** > **Assignments**.

2. On the **Role Assignments** page, click **+Create Assignment** in the upper-right corner.

3. On the **Create assignments** pop-up, select the user from the list to whom you want to assign the new role.

4. Under **Role**, select the **Storage Admin** role from the list.

5. Under **Scope**, set the scope based on:

   - **Sites** at a single or multiple site(s) - Users can see recordings only for the users from that site(s).

   - **Contact Center** at a single or multiple Contact Center tenant(s) - Users can only see recordings for users from that contact center(s) at the tenant level.

   - **User Group** at a single or multiple user group(s) - Users can see recordings only for users from that group(s).

6. Save your settings.

> **Note**: The **Storage filter** is visible on the **Roles & Permissions** page only if the user has the appropriate permissions for the Storage app.

You can now assign users limited access to recordings related to specific user groups.

Limiting access to recordings is helpful for the supervisors to see only the recordings of members of the group they monitor.

Let's say a supervisor wants to see the recordings of members of groups the supervisor is responsible for. You can allow the supervisor access to the recordings of users belonging only to those groups.

> **Note**:
> - The supervisor will be able to see the user's recordings only once the user has been included in the group. Recordings made by the user before joining the group will not appear on the Recordings page.
> - If a group member has left the group, the supervisor can see the recordings related to that user only for the time the user belonged to that group. After the user leaves that group, subsequent recordings will no longer be visible.

To give users limited access to recordings:

1. From the **Menu** ▤ , go to **Roles and Permissions** > **Assignments**.

2. In the **Role Assignments** page, click **+Create Assignment** in the upper-right corner.

3. In the **Create assignments** pop-up, select the user from the list and assign a new role for the Storage Admin scope.

4. Save your settings.

5. From the **Menu** ▤ , go to **Recordings**. Depending on the permissions and scope (s) granted, the user might see a different list of recordings:

   - Users having permissions for a specific group can only see the recordings for users belonging to that group.

- Users with permissions for all groups can see the recordings for all users belonging to all groups.

- Users with permissions for a specific site and all groups can see the recordings for users belonging to that particular site (cluj) and all groups.

A user with permissions for all groups (group1 and group2) and for a specific site (cluj) can see the recordings set up for all groups (group1 and group2) and for that site (cluj)

Set up ring groups

Ring groups allow incoming calls to be distributed efficiently among a group of users and throughout a business. A Ring group allows you to have multiple phones ring when one extension or number is dialed. It is a great way for a business to share the distribution of incoming calls among employees. It is often used to efficiently distribute calls within specific departments such as Sales, Customer Support and Accounting. You can have all the phones in a ring group ring at once or set up a "round robin" approach where the extensions in the group ring in a specific order until the call is answered.

Ring groups allow your employees to be more productive and help decrease customer hold time. If all of the users assigned to a ring group are unavailable, you have forwarding options such as routing the call to the ring group's voicemail or transferring the call to another extension.

Features

- Allocate multiple phone numbers to a ring group.

- Choose from a variety of ring patterns: Cyclic, Cyclic Repetitive, and Simultaneous.

- Forward calls to voicemail, a user, a call queue, a ring group, or an external number when no users are available.

- Allow user access to ring group voicemail; users must dial <555> from their assigned number, or <500> from any other phone in the phone system.

- Reorder members easily by dragging and dropping them in the list.

- Play audio (a message or music) for callers as they wait to be served.

- Define the total time to alert a member before a call goes to the next member, or the no-answer call forwarding rule applies.

Here are some examples of how a business can use ring groups:

- **Small business with four employees**: Set up a ring group to include all four employees. When a call comes in, you could have all four phones ring simultaneously so whoever picks up first takes the call. Otherwise, you can set up the ring group so the phones ring in a specific order to better distribute the workload.

- **Larger business**: Set up a ring group for your sales team. When a call comes in to your Sales number, you can set it up to ring the sales representatives in a certain order so they each get a turn to answer incoming calls. Otherwise, you can set it up so all the phones in the group ring simultaneously; whoever answers the phone fastest gets the sale!

- **Multiple Departments**: If you have multiple departments in your company, use ring groups to simplify transferring calls. Set up ring groups for Sales, Technical Support, Shipping, etc. Then you can either set up your auto attendant to route calls to these ring groups (for example, "Press 1 for Sales, Press 2 for Technical Support, etc..."), or you can have the receptionist transfer live calls to the appropriate ring group instead of calling multiple extensions to find a live person to take the call.

Ring groups offer inbound calls to group members by ringing their phones extension-to-extension in succession, in a specific order, or simultaneously:

- **Round Robin (Cyclic Pattern)**: Also known as rollover. A cyclic pattern allows an equal distribution of calls, making sure all extensions in the ring group assist in answering the calls. You can set the number of times the call cycles through the extensions before going to voicemail.

  For example, in a four-line ring group, the first call rings John (no answer), Lisa (no answer), Rob (answered). The second call rings Andy (no answer), then John (answered).

- **Sequential (Cyclic Repetitive)**: Allows calls to be distributed among all users in the group in the same order that the users are listed in the group. Each new call starts at the first user. You can set the number of times the call cycles through the users before going to voicemail or next destination.

  For example, in a three-line ring group, the first call rings John (no answer), then Lisa (answered). The second call rings John (answered). The third call rings John (no answer), Lisa (no answer), then Rob (answered).

- **Simultaneous Ring**: Ensures that all extensions in the group ring when a call is received. The first extension to pick up the phone answers the call.

The following diagram is an example of a cyclic ring pattern. For a four-line ring group, the first call rings John (no answer), then rings Lisa (no answer), and then goes to Rob (answered). The second call is offered to Lisa first, then goes to Rob and Andy if it is not answered.

Ring groups allow your employees to be more productive and help decrease customer hold time. A ring group allows you to direct a call to multiple users instead of a single user. For example, if your company's billing department experiences a high call volume, you can create a ring group containing all billing representatives, and forward the call to the ring group. When customers call, the call is offered to the entire group (rather than a single representative), decreasing customer hold time. If none of the users assigned to a ring group are available, you can use call forwarding options to send the calls to the ring group's voicemail, another extension, or your auto attendant.

To set up a ring group, you need a name, a site, and a dedicated extension number. Select a ring group caller ID for your callers, choose a ring pattern, set up a voicemail password for users to check the ring group messages, select the audio to play for callers, and set up rules to forward the calls when needed.

To set up a ring group:

1. Go to **Home > Ring Groups**, then click **+ Create Ring Group**.

2. Enter the **Basic information**, such as group name, site, phone numbers, and extension number. You can select one or more phone numbers from the available numbers. When setting up a ring group, the available phone numbers appear in the phone numbers list. You may need to claim more numbers if you do not have any numbers to assign.

3. Select an **Extension Number** for the ring group. The extension number is used for the inbound calls.

4. Click to enable **Display Ring Group in company directory**. The ring group's name and extension number appears in the company directory.

5. Select the **Ring Group Caller ID** and choose how you want your incoming calls to be displayed for this ring group. The caller ID can be a group name and number, a caller's name and number, or a group name and extension. The default setting is Ring Group Name and Ring Group Extension.

6. If you select a **Ring Pattern**, you must also enter the number of **Cycles** before the calls are routed to voicemail. **Simultaneous Ring** automatically selects one cycle. See what is the right ring pattern for you.

7. Enter the **Total time to alert a member**. This value defines how long an incoming call should ring before moving to the next member, or to a call forwarding rule. Each member gets 15 seconds by default that is equal to three rings. The maximum alert time is 180 seconds.

8. Enter the number of times calls will cycle through before being forwarded. The valid range is 1-20. Let's say you enter a value of 3, an incoming call to the ring group cycles three times, if not accepted, gets forwarded.

9. Enable **Notify members even if busy**. This option notifies the ring group members that there is another incoming call, even if the member is busy.

10. Select a **Ring Back music** file to play music or a message for callers while they wait to be served. The default audio file will be used if you do not select a music of your choice. Click **Change** to access the audio files library. For details, see our content on Manage audio files library.

    Ring Back music functions in the same way as Music On Hold. When you select Ring Back music, a continuous ring back plays by default.

11. Scroll down to add **Members**. The left-side navigation menu allows you to jump to the desired section quickly without having to scroll multiple screens. You must have at least one member in your ring group. You can search and find users by their first name, last name, or email ID. You can select members from all sites within the same phone system (PBX). You can change the order of members in the group by dragging and dropping them. The order of members in sequential pattern determines who gets the new call first. See Sequential (Cyclic Repetitive) ring pattern.

12. In **Voicemail Settings**, set up the following options:

- **External voicemail greeting**: Greeting played for people outside the company. In the absence of a custom external voicemail greeting, the default audio greeting is played.

- **Internal voicemail greeting**: Greeting played for people inside the company. In the absence of a custom internal voicemail greeting, the default audio greeting is played.

- **Notification**:choose one of the following notification options:

  o **Attachment only and delete original voicemail** - Set up a group email address to receive voicemails, then delete it from the service. You don't have to enable the access of any group member to voicemail (group members no longer receive voicemails in their email boxes because they always will be empty).

  o **Disable Notification** - Set up a group member to receive voicemail notifications. At least one group member should have voicemail access enabled (because voicemails are built up in the box).

  o **Attachment only** - Set up a group member to receive voicemail notifications. At least one group member should have voicemail access enabled (because voicemails are built up in the box).

  o **Notification only** - Set up a group member to receive voicemail notifications. At least one group member should have voicemail access enabled (because voicemails are built up in the box).

  > **Note**: When you try to disable all the group members, and you choose the Attachment only and delete original voicemail option, you don't have to enable the access of any group member to voicemail. A warning notification displays for other options, and you must enable at least one member to have voicemail access.

- **Email**: enter the email address to be associated with the voicemail.

- **Voicemail access PIN**: Set up the access PIN for the ring group's voicemail box. The members need the password to access the queue's voicemail. The password is numeric-only, and must contain 6 to 15 non-sequential digits. You can direct calls

to the ring group's voicemail by editing the call forwarding settings. To access the voicemail messages, from any extension in your 8x8 system, dial **500**. See our FAQ question: How do I access my ring group voicemail?

13. Set up **Call Forwarding** rules for the ring group when the Internet connection is down, all members are busy, or no one in the ring group answers. To edit the call forwarding rules, while editing a ring group, go to **Ring Group > Call Forwarding**

and click ✎ next to a rule. You can forward the calls to a voicemail, a user or service, or do not forward any calls. The callers only hear a ring tone. See FAQ: How do I access the ring group voicemail?

14. Click **Save**. The new ring group is added to your ring group list. Scroll down or navigate to see additional results.

You can quickly check a ring group's information by opening the ring group's Info Panel.

To view ring group's Summary information:

1. Go to **Home > Ring Groups**.

2. Click a ring group to open its Info Panel.

3. You can check information such as PBX, site, extension and phone number, caller ID, voicemail settings, members, and more.

FAQs

Refer to the following frequently-asked questions for more information:

No; you need to contact your administrator to reset the ring group voicemail password.

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- To edit a ring group, go to **Home > Ring Groups** and click ✎ next to the desired ring group.

- To delete a ring group, go to **Home > Ring Groups** and click 🗑 next to the desired ring group.

1. While creating or editing a ring group, scroll down to **Ring Back music**, and click **Change File**.

2. In the window that opens, click **+ Create Audio Files**. You can either upload an existing file, or provide a phone number for the system to make a call to. The system calls your number and prompts you to record a new audio file.

3. Drag and drop your audio file, or click to browse your file directory. The supported file formats are AU, WAV, and MP3. The files must be 5MB or smaller in size.

4. Click **Save**. The audio file is uploaded to the ring group.
   Play the file and verify that it is correct. You can determine the speed at which the audio plays by choosing 0.5x, 1x, and 2x from the menu.

No; once you are selected as a member by the administrator, you cannot log in or log out from a ring group. The incoming calls to the ring group are offered to you.

1. From any extension in your 8x8 system, dial **500**.

2. Enter the **Ring Group extension number**, and press <#>.

3. Enter the **Ring Group voicemail password**, and press <#>.

4. From the Main Menu:

   - Press 1 to listen to your messages.

   - Press 2 to change your greeting.

- Press 3 to manage user preference options: change voicemail password, call waiting preferences, busy handling, ring no answer handling, Internet outage routing, and email notification preferences.
- Press 4 to establish or change call forwarding rules. Options include: listen to, set, change, or cancel call forwarding rules.
- Press 5 to set a specific greeting for business hours, after business hours, lunch time, meeting, weekend, and vacation.
- Press 6 to enable or disable Announcement Only mode (e.g., your vacation greeting).
- Press 9 to exit voicemail.

While editing a ring group, scroll down to **Voicemail**, and click **Reset Password**. Enter a new password. It must contain 6 to 15 non-sequential digits, and **Save**. An email with the new password is sent to the ring group members.

If a call comes in to a ring group and is answered by another member of the group, it appears as a missed call for other members of the group.

If your phone does not ring on incoming calls to a ring group, one of these reasons may apply: call forwarding rule(s) are enabled, the Do Not Disturb (DND) status is enabled, the device is offline, or the ring group settings are not valid.

While creating or editing a ring group, scroll down to **Members**. Click ⋮ next to the desired user, and select **Enable voicemail access** or **Disable voicemail access** from the menu.

While editing a ring group, scroll down to **Members**. Click the bar to the left of the desired user, and move it up or down to change the order of the members in the group. For example, if you have moved John to the top of the list above Lisa and Rob, and selected Sequential (Cyclic Repetitive) call pattern, a call is always offered to John first, Lisa second, and Rob third.

While editing a ring group, go to **Ring Back Music** and click **Change File**. Click 🗑 next to the audio file that you like to delete. If you do not choose another audio file before deleting the currently selected audio file, the default audio file is selected. The audio files repository is also accessible from Users, Auto Attendant, and Call Queue edit pages.

Set up Barge-Monitor-Whisper

8x8 Barge-Monitor-Whisper (BMW) is an excellent tool that helps office managers and supervisors to monitor phone conversations of employees in the organization with customers or others. Whether it is to ensure quality of customer service, to coach new agents during a conversation, or to interrupt a live call for an emergency, 8x8 Barge-Monitor-Whisper gives you flexibility in your call center.

8x8 Barge-Monitor-Whisper (BMW) helps office managers and supervisors to optionally listen in on any active call in your phone system; whisper exclusively to the user being monitored (without the other party hearing), or actively join the call and make it a three-way conference.

To check the status of a user before monitoring their call, you can:

- Configure one of your BLF keys on your phone extension to check for the busy status of the user.

- Log in to the 8x8 Work for Desktop or 8x8 Work for Mobile to check for the busy status of the user.

- Log in to Switchboard Pro to check for the busy status of the user.

- Log in to Analytics for 8x8 Work to observe active calls (which indirectly indicate a busy status).

Features

- Ensure professional quality of customer service or customer support.
- Coach new agents during a phone call.
- Assist sales agents in negotiating a sales deal while
- Enable supervisors, receptionists, or admins to monitor then barge into live calls for important or emergency interruptions.
- Choose whether to alert users when a supervisor starts monitoring.
- Choose whether to use a password for additional security.

The following use cases are common uses of the Barge-Monitor-Whisper service:

- **Front Desk Receptionist**: If there is a high-priority call for an employee who is currently busy on another call, the receptionist could simply barge in and inform the user of the important call.
- **Sales Team Supervisor/Call Center Supervisor**: Supervisors can silently listen to the agent's calls with customers to ensure that a high quality of service is delivered, and barge in on calls when necessary, creating a three-way conference call to rescue or assist the transaction.
- **Group Trainer**: A group trainer can listen to calls handled by group members and coach them live about phone etiquette, either whispering to them during the call or advising them after the call.

To set up BMW, create a BMW group and add users who need to be monitored. You must also assign an administrator to the group who monitors the members of this BMW group. You can enable a monitoring tone to play and notify users who are being monitored, and require administrators to enter a password before monitoring a user. Barge permissions are granted to primary extension users only that excludes extensions associated with call queues, ring groups, virtual extensions, or auto attendants. In other words, only users can be part of a BMW group either as a member or administrator.

To set up BMW:

1. Go to **Home Barge Monitor Whisper Groups**, then click **+ Create BMW Groups**.

2. Enter a **Name** for the BMW group, and select a **Site**.
   Users must belong to a site. If you have only one site, the site is automatically selected.

3. Select a BMW admin under **Group Admins**. A BMW group admin is a user with privileges to barge and monitor the phone conversations of the members of a group during an agent's call. The BMW admin is automatically added to the list of admins when you assign a certain license to the user in the user profile page. The BMW admin is not restricted to one site, but can be selected from any available site in the phone system. For details about 8x8 Work administrators, see our content on Assign Admin Rights to Users.

4. Add **Members** to the BMW group, and click **Save**.
   The BMW group lists the users whose calls you can monitor. You can search for users by first name, last name, or email address. You can select members from all sites within the same phone system (PBX). Only users with extension numbers can be added to the list.

A BMW group administrator must use a desk phone or softphone for this feature. Users must be added to the BMW group individually in 8x8 Admin Console by the phone system administrator.

A supervisor who is silently monitoring a call decides to enter the conference bridge, joining what then becomes a full three-way conference call, in which all three parties can hear each other. When the supervisor enters the call, a barge tone is played to alert all three parties.

To barge in on a user's phone conversation:

1. To barge in and join the call that you are already monitoring, dial <*5> or <*J>.

2. To exit the barge and revert to silent monitor mode, dial <*6> or <*M>.

A supervisor silently monitors a normal two-party call answered by (or originated from) an 8x8 user on a conversation with an external party or customer. No audible sound would alert the agent or the customer that the conversation is being monitored. {mf--is this true? Play Monitor tone does enable the audible sound!} - [MM-What's also confusing is the usage of "would alert"; it makes it sound like no audible sound would *ever* alert the agent, rather than alerts being controllable via BMW settings.]The supervisor is muted. The privilege to monitor calls (with or without a warning tone) can be granted to the supervisor by the phone system administrator.

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> **Note:** Please be aware that many jurisdictions require businesses to notify workers and callers about call monitoring or recording and obtain their consent. For details, please refer to Compliance and Privacy Notice.

To monitor a user's phone conversation:

1. Dial <*22> or <*BA> before lifting the handset.

2. Press **Dial** or **Call**.

3. At the prompt, enter the user's extension number you want to monitor. You may be prompted for a password.

4. Enter the password to begin monitoring.

A supervisor silently monitoring a call between an agent and a customer can privately speak to the agent, without the customer

hearing the discussion. When the whisper feature is activated, the supervisor can begin speaking to the agent. This is one-directional audio from supervisor to agent. The customer does not hear the whisper, while both the supervisor and the agent can hear the customer.

To whisper to a user during a phone conversation:

1. To whisper to the agent who you are already monitoring, dial <*9> or <*W>.
2. To exit the whisper, mute the supervisor audio, and revert to silent monitor mode, dial <*6> or <*M>.

A supervisor can also barge directly in on a call without monitoring first. This facilitates instant collaboration. Dial <*23>, then dial the extension number. You are immediately placed in a three-way conference call with the active call. You can also create a speed dial by combining *23 with the desired extension number: if you want to reach extension 1001, for example, you can create speed dial number <*231001>.

8x8 Barge-Monitor-Whisper helps managers and supervisors to monitor phone conversations of employees with customers or others.

Supervisors can use the whisper feature to communicate with the agent or the barge feature to communicate with both the agent and the customer. Please note that applicable privacy laws may require the consent of agents working for your business and your customers or others calling in. 8x8 provides recommended call monitoring and recording notification messages to callers for this purpose, although the use of these notifications does not relieve customer from the obligation to comply with applicable laws. More specifically, your business may have obligations under privacy laws to:

- Inform workers and callers that a call may be monitored or recorded and the purposes for which the information will be used.

- Obtain consent to the monitoring or recording. If a caller proceeds with a call after hearing it will be monitored and recorded, consent may be implied.

- Provide practical alternatives to callers objecting to monitoring or recording, such as communicating in writing.

- Limit the uses of the information collected to the purposes specified to workers and callers.

- Comply with general privacy obligations regarding collected information, such as safeguarding it and providing access to it for purposes of updating and correcting it.

Nothing in this notice constitutes legal advice, and if you have any questions about applicable privacy laws, please consult a legal professional.

FAQs

Refer to the following frequently-asked questions for more information:

While creating or editing BMW, enable **Play Monitor Tone**. This option alerts the group member with a beep when an administrator starts monitoring.

Administrators can prevent misuse of the system by prompting for a password. The user is required to enter the password to be able to monitor a call.

1. From the main menu, go to **Home Barge Monitor Whispers Group**.

2. To edit, click next to the desired group.

3. To delete a BMW, click next to the desired group.

Set up Group Call Pickup

With 8x8 Group Call Pickup, employees can answer incoming calls for other group members, without requiring the user to walk to their colleague's phone.

Small offices or teams of coworkers sitting near each other can improve productivity with Group Call Pickup. Incoming calls to colleagues can be answered even when the person being called is not at their desk, and employees answering the call can pick it up from their own phone. Group Call Pickup is a great way to ensure calls are always answered promptly and customer service is at its best.

Group Call Pickup also works on the 8x8 Work for Desktop and 8x8 Work for Mobile, but does not allow remote monitoring.

Features

- Improve the availability of your teams and workgroups. Incoming calls can still be answered even when the intended caller is not available.

- Improve productivity within your office. Any call pickup group member can pick up an incoming call without leaving their desk.

- Ensure that calls are always answered promptly and customer service is at its best.

- A user can belong to one or multiple Group Call Pickups.

- Easy to administer and configure.

- Only users with extension numbers assigned can be added to this group.

- Set up and use Group Call Pickup on its own, or use with Line Keys for additional features.

Limitation

Group Call Pickup does not support remote monitoring.

A small office or group of co-workers do not need formal ring group or DID overflow routing, but want to answer calls when the intended recipient is unavailable. In this scenario, users often want to pick up a ringing call from their own desk instead of walking to the recipient's ringing phone. The administrator creates a call pickup group and adds desired extension users to that group. The extension users then receive a pickup extension number via email. When an absent group member receives a call, in their absence, the call can be answered by any other group member using their handset.

To set up a group call pickup, you must create a group, dedicate an extension number, and add members to the group. The members are the users in the same site who answer the calls for any other member in that group.

To set up a group call pickup:

1. Go to **Home > Group Call Pickups**, then click **+ Create Group Call Pickup**.

2. Enter a **Name** for your group call pickup, and select a **Site**, if you have more than one site.

3. Select an **Extension Number** for the group call pickup. Members use this extension number to answer the incoming calls to the group.

4. Add **Members** to the group. You can select members from all sites within the same phone system (PBX).

> **Notes:**
> - If you remove a member from the list, the user is also removed from the queue membership.
> - Being a group member denotes permission to answer another user's phone.

5. Enable **Send Welcome Email**, and click **Save**.
   It sends a welcome email to the members of the group including the group's extension number, and instructions on how to use it.

You can search group call pickups by name or an extension number. To search for a group call pickup, go to **Home > Group Call Pickups** and enter the group name or extension number you are looking for.

When an absent group member receives a call, in their absence, the call can be answered by any other group member using their handset. You can answer a call coming to the group call pickup using any of the following ways:

- Dial *66 then enter the group call pickup extension.
- If you have access to Line Keys, press the speed dial key pre-programmed for group call pickup on your phone.
- If you have access to Line Keys, press the group call pickup pre-programed BLF key on your phone.

FAQ

Refer to the following frequently-asked questions for more information:

You can search group call pickups by name or an extension number. To search for a group call pickup, go to **Home > Group Call Pickups** and enter the group name or extension number you are looking for.

Users who are part of the same group call pickup can use their own telephone to pick up an incoming call to any other group member. To answer an incoming call to another group member, dial <*66> followed by the group call pickup extension number, such as <1001>.

1. From the main menu, go to **Home > Group Call Pickups**.

2. To edit a group call pickup, click next to the desired group. To delete a group call pickup, click next to the desired group.

No, remote monitoring is not available for Group Call Pickup. Use BLF call pickup for remote monitoring.

Group Call Pickup creates the ability for a group of individuals to pick up a ringing phone without having to physically have access to that phone. Group Call Pickup also works on the 8x8 Work for Desktop and 8x8 Work for Mobilebut it does not allow remote monitoring.
BLF Call Pickup enables an individual to pick up a ringing call on an extension that he or she is monitoring. This can be a remotely monitored extension. The users do not have to be within earshot of the ringing line. The Power Keys service is required for BLF Call Pickup, and this service only works on supported Polycom desk phones.

If enabled by the administrator, an automatic welcome email is sent to the members to notify them of the group name and extension number.

Set up paging

Paging allows users to make announcements to a department or a team by dialing an extension or pressing the softkey on their activated Polycom or Cisco phones. 8x8 8x8 Work offers two types of paging:

- Group Paging
- Overhead Paging

Group paging

Group intercom paging is used to make real-time announcements to a department, team or work area using the intercom feature on your Polycom and Cisco phones. Send a one-way message to specific paging groups or broadcast your page to all other Polycom or Cisco phones in your office. In order to access paging functionality, the user must have an activated Polycom or Cisco phone and be a member of the paging group. With Polycom phones, you can choose normal, emergency, or priority group.

Features

- Up to 25 free paging groups per site is included with Polycom and Cisco phones.
- Create up to 23 normal paging groups with Polycom phones. One priority and one emergency group already exists by default.
- Set priority levels for your pages: Normal, Priority, and Emergency (Polycom phones only).
- Create one emergency paging group with Cisco phones.
- Set permissions for who can broadcast pages and who can only receive them.
- You can include a user in multiple paging groups.
- You need at least one member for every paging group.
- You need at least one member with Send capabilities for emergency or priority paging.
- You need at least one member with Send capabilities and one member with Receive capabilities for normal paging.

> **Note:** Paging group uses IP multicast to send group pages to all registered phones on the network at once. This technology requires all phones in a group page have access to the same multicast IP address. In most cases, it requires all phones receive their IP address from the same router. Geographically-dispersed phones that are serviced by separate routers do not support uniform access to intercom paging group.

Limitations

- Only emergency paging is supported in Cisco phones. Emergency paging interrupts the group members active calls.
- Paging extensions are not restricted to who can send a page.

Let's assume you must broadcast an important message to a handful of employees in your store's backroom and do not want customers on the floor to hear it. All you need, is to create a paging group in 8x8 Admin Console and add those employees as the group members. Set the message priority, enable send option, and save. Your message is sent to those employees only, but not everyone else in the store.

Now let's assume you need to announce the store's closing time to your customers and remind them to bring their purchases to the cash register as early as possible. As long as you have an ATA device in your inventory, you create a user account for your overhead paging. Assign a telephone extension number and ATA device, and save. You can make your announcement by calling the overhead paging extension number from any other phone.

To create group paging:

1. Go to **Home > Groups Paging**, then click **+ Create Paging Group**.
2. Enter a **Name** for the paging group and select a **Site**.
3. Select a **Device Model**: Polycom or Cisco. Once you select a device model, the field becomes disabled. Only members with that specified device can be added to the paging group.

4. For Polycom phones, determine the **Priority** to deliver paging, such as normal, priority, or emergency. You cannot unsubscribe from a priority or emergency group. A priority page interrupts normal pages or active calls. An emergency page interrupts normal pages, priority pages, and active calls and plays out at near maximum volume even if Do Not Disturb (DND) is turned on. In Cisco phones, only emergency option is available.

5. For Cisco phones, add an **Extension number**. This option is not available for Polycom phones.

6. Add **Members** to the group and **Save**. You can select members from the specified site or all sites within the same phone system (PBX) as long as users have the same device model, Cisco or Polycom.

> **Notes:**
> -You must add at least one member to the paging group.
> - In order to access paging functionality, the user must have an activated Polycom or Cisco phone and be a member of the paging group.
> - In Polycom phones, the paging group must have at least one member with Send or Receive option. The user's phone reboots and displays **Paging** soft key in the menu. If you cannot see it, press **More** on your phone display. See how to use Paging Group.
> - In Cisco phones, however, the paging group must have at least one member with Receive option. The Send option is not enabled and the users must dial the group paging extension number to page.

7. Click **Save**.

> **Note:** To edit the device model, you must delete the members first.

After you create a paging group in 8x8 Admin Console, your Polycom phone reboots and displays Paging soft key on the display. Follow the instructions below to page. The phone sends a preamble or repetitive set of alert messages that ensure receiving

phones are ready to receive the broadcast.

To send paging using a Polycom phone:

1. From the main screen, select **Paging**.

2. Scroll through the list to locate the group you want to page, then select **Page**.

3. Wait while your phone sends the preamble.

4. After you hear the beep, begin your announcement.

5. When you are done, select **End Page**, or pick up the handset.

   As the page receiver, you can terminate an incoming page by pressing the End Page

soft key. To make a call during an incoming page announcement, simply begin dialing.

After you create a paging group in 8x8 Admin Console, all the Cisco phones in that group are ready to receive pages. For example, to page all the phones in the shipping department, a person at any phone dials the extension number associated with the paging group. The phone sends a preamble or repetitive set of alert messages that ensure receiving phones are ready to receive the broadcast. Follow the instructions below to page.

To send paging using Cisco phones:

1. Dial the paging group extension number from any Cisco phone.

2. Wait while your phone sends the preamble.

3. After you hear the beep, begin your announcement. The group members receive the page on their Cisco phones.

4. When you are done, simply hang up.
   The emergency page interrupts normal pages, priority pages, and active calls and plays out at near maximum volume even if Do Not Disturb (DND) is turned on.

> **Note:** See our 8x8 supported Cisco phones.

Overhead paging

With 8x8 Work overhead paging system (also known as ZONE overhead paging) you can dial an extension number and connect to an announcement paging system. The announcement system is a one-way speaker system, such as an amplifier connecting to a speaker. After dialing the extension number associated with the overhead paging (and an optional password check), the caller can begin speaking immediately. See our Knowledgebase articles about Overhead Paging.

Features

- Support multiple overhead paging extensions within a phone system (PBX).

- Install Overhead Paging systems in different time zones and have specific extension numbers for each zone.

- Works with paging systems that have a standard analog phone input.

- Set up a password for the overhead paging extension. The password is blank by default.

- The password check is skipped if the user is calling from the receptionist extension.

Limitations

- In Obihai OBI 508, port number 9 must be saved for overhead paging and not used for analog voice or analog fax devices.

- Port 9 is not yet available for use with SMP/CM.

Setting up overhead paging is a two-step process: you first need to add an ATA device to your inventory and then create a user with a license and phone number dedicated to the overhead paging. For extra security, you can assign a password to the account so that only people in charge can make announcements. To use the overhead paging, call the extension number, enter the password, and begin the announcement.

To create overhead paging:

1. Go to **Home > Devices**.

2. Add an ATA device such as Obihai OBi 300 1 port SIP ATA to your device inventory.
   You must then create a new user for the overhead paging, and assign the ATA device to it.

3. Go to **Home > Users**, then click **+ Create User**.

4. Enter a name for the overhead paging, such as AcmeOverhead Paging.

5. Enter the **Site** and assign a service.

6. Select a telephone number and an extension number.
   Each user is associated with a DID in 8x8 Admin Console. The extension number is used to call and make overhead paging announcements.

7. Select **Overhead Paging device**. You need to activate the device if not done already.

8. Click to **Select ATA terminal** and a **Port**.

9. Optionally, you can enter a password in the **Overhead paging device password**. Password gives you an extra layer of protection, making sure unauthorized users cannot access overhead paging. The password is not required if you leave it unfilled during the set up. If you define the password, the user must enter it each time she uses the overhead paging. See how to use Overhead Paging.

10. Click to **Save** the changes.

Setting up Overhead Paging may require some advanced set up. See our Knowledgebase articles about Overhead Paging for more information.

8x8 supports multiple overhead paging extensions within a virtual phone system (PBX). 8x8 Work subscribers can install overhead paging systems in different time zones and have specific extension numbers for each zone. In order to access overhead paging you must have an activated Polycom phone.{mf--can we page multiple sites?}To use overhead paging system, you must dial the overhead paging extension number (and the password, if set up) and connect to the announcement paging system. The announcement system is a one-way speaker system, such as an amplifier connecting to a speaker. Once connected, you can begin speaking immediately.

FAQ

Refer to the following frequently-asked questions for more information:

To change the password, while editing the overhead user's account, click **Reset Password**. Enter a new password and save. The new password will be in effect the next time the user uses overhead paging. To remove the password, delete it from the overhead paging user account, and save.

A paging announcement continues until the sender terminates the page by pressing the

End Page soft key, by pressing a line key, or by picking up the handset. The page receiver can terminate an incoming page by pressing the End Page soft key. If the receiver wants to make a call during an incoming page announcement, simply begin dialing.

If you receive an incoming page during an active call, by default, the page is automatically placed on hold and its status changes to Pending, which means that the page is temporarily on hold. When you end your call and the page is still incoming, the page will continue. You can also configure the phone to accept pages during active calls.

If two users simultaneously start a page on the same paging group, the phone with the lower serial number will continue to transmit while the other phone will enter the receiving state.

You cannot unsubscribe from a priority or emergency group. A priority page will interrupt normal pages or active calls. An emergency page will interrupt normal pages, priority pages, and active calls and plays out at near maximum volume even if Do Not Disturb (DND) is turned on.

If you change the volume on your phone, it will only affect Normal and Priority pages. If Do Not Disturb (DND) is turned on, Normal pages and Priority pages are blocked and the phone screen is cleared of all page related items. Incoming page status will become pending.

- To edit a paging group, go to **Home > Paging** and click next to the desired group.

- To delete a paging group, go to **Home > Paging** and click next to the desired group.

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Manage your devices

The Device inventory helps you allocate and manage your devices in the phone system. Add new device models to your phone system, get an inventory of the device types, check if you have any unassigned devices to assign to new users, view if the devices are activated or not, drill down for more details for each device type.

Features

- Access a single consolidated view of your device inventory, showing if the device is activated or assigned to a user. The inventory also shows the site location.
- Access MAC addresses and activation codes through device report, helping administrators activate a number of devices at the same time.
- Add devices that are supported by 8x8. You can buy your own device (BYOD), or buy new from 8x8 or any other vendor.
- Add unlimited number of devices of a certain type to your inventory. We do not keep track of the number of devices you add.
- Get support for DECT and ATA devices.
- Optimize voice and fax quality by selecting Analog fax or Analog voice.
- Generate device report to view device details such as: device type, status, activation code, MAC address, and more.

Limitations

- Devices are synchronized immediately after configuration. The synchronization time cannot be set in advance.
- A port is automatically assigned by the system when configuring DECT devices. The port or socket number cannot be determined by users.
- Each user can have one device assigned.

Users must have devices to communicate with other users or customers. In 8x8 Contact Center

8x8 Admin Console, your contact center agents may need desk phones dedicated to handling contact center calls. Assign these agents with dedicated extensions. The dedicated extensions require you to assign phone devices while creating users. In preparation, you must add the desired phone model to the device inventory.

Follow the following steps to view devices, add them to your inventory, and assign them to users before activating them:

You can view all devices you have added to your site inventory in one single page. The devices are grouped together by the model number, such as Polycom VVX 300. You can also see if a device is assigned to a user or has been activated.

To view the device status and check the inventory:

1. Go to **Home > Devices**.
   All devices in your inventory appears on the device page. You can see how many of any device model is assigned to a user and active.

2. Click **View device report**.
   More information is presented such as MAC address, device admin password, extension number, status, activation code, site, and the user who is associated with the device. You can filter your view by **Device Model** or activation **Status**. Clicking the header row allows you to sort the results alphabetically.

3. In the **Devices > Details** page, click a device on the list to open the device's Info Panel. The device information such as device model appears on the right. The device model information specially helps when selecting a DECT base or an ATA terminal.

4. In the **Devices > Details** page, for a quick and easy access to the Line Key configuration page, click ✏ next to the devices that are configured with Line Keys.

5. To view port assignment for DECT bases and ATA terminals, and inspect what ports are assigned to users, click a DECT or ATA device in the list. The device's Info panel opens with the number of ports and the port assignments.

6. Click **Generate devices report** to download a report. The report allows administrators to print a list of information such as MAC address, MAC password, device model, extension, activation code, site, status, user, and number of users. You can activate a device remotely.

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If you do not see the device you are planning to assign to your user in the inventory, you must add it. You can use any existing device or purchase one from a vendor, as long as it is supported by 8x8. Search and add the device of your choice before assigning it to users.

To add a device model:

1. Go to **Home > Devices**.

2. Click **+ Add device model**.

3. Search and add the device model that you are looking for. The device appears in the list. Click on the device to see more details.

Once you add a device to your inventory, you can assign it to any user. While editing a user, go to **Voice Basic Settings > Device** to select a device and save. You can activate the device at a later time. The devices you assign to the users must be activated before first use.

> **Note:** You must select a license to be able to see the Voice Basic Settings.

To assign and activate a device:

1. Go to **Home > Users**.

2. While editing a user, go to **Voice basic settings > Device model**. The available devices in your inventory appear in the list. Select a device to add. You must select a base for DECT devices and a terminal for ATA devices. See how to add a DECT or ATA device.

3. When you select a device, you need to activate the device. You can **Activate Device by**:

- **Input MAC address**: You can activate the device remotely. Select **Input MAC address** and enter the unique alphanumeric identifier assigned to the device for the user. The device is activated remotely once the user is saved. A MAC address is ideal when there is no email associated with the user, such as lobby or computer lab phones.

- **Use an Activation Code**: You can activate the device directly from the device. Select **Use an Activation Code**. Once the user is saved, an automatic code is generated by the system for the device, and associated with the user. The activation code is then sent to the user in their welcome email. The user can activate the device from their desk by calling the 8x8 registration service and entering the activation code.

4. Click **Save**.
   If you have selected the activation code, look for a welcome email and follow the instructions to activate your phone. For activating a number of devices, you can generate a report, print the list of devices and their access codes, and activate

the devices remotely.

8x8 supports DECT (cordless) phones such as Yealink. A DECT phone includes a handset and a base. For a Yealink DECT phone, you can have up to four handsets. With four handsets, you can handle foursimultaneous calls.

To assign a DECT phone, check your device inventory first. If you do not have a DECT phone, you need to add a base first. A handset is included with the base and automatically added to your inventory.

To assign DECT phones to users:

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1. Go to **Home > Devices**.

2. Check your device inventory to see if you have a DECT. If you do not have a DECT, you can click **+Add device model** to add a base such as Yealink W52p. See how to add a device to your inventory.

3. Click **Add device model** again.
   The system automatically adds the DECT Handset to the inventory.

   You now need to assign the handset to a user.

4. Go to **Home > Users**.

5. While editing a user, select a handset from the **Device** drop-down menu.
   The Base device field appears as soon as you select a handset. A message in red next to the field indicates the device has not been activated.

6. From the **Base device** drop-down menu, select the corresponding base.

   > **Note:** For best practice, click **Change Base Name** and rename the base according to the department, group, or team, to easily locate it later.

   > **Note:** For DECT units, the system allocates the next available port. If all ports are used, the DECT base does not appear in the list. Yealink DECT phones come with four ports.

7. Select an activation method. You can either activate the device remotely or send the user the activation code. See how you can activate a device.

8. Click to **Save** the user.

   Users must plug in their base and handset, and connect to Ethernet. They may need to activate their phones, if not activated remotely, and pair the handset with base. Follow the instructions on Yealink activation and pairing guides.

You may need to add an additional DECT base for the users who have recently joined your company. Let's say you have eight handsets with a Yealink DECT base that are

already assigned to users. You've just hired a new employee and need a second base of the same type to add the new employee's handset to. Since you have added the device type for your first base already, you just need to rename the base to differentiate it from the first base.

To add an additional DECT base:

1. Go to **Home > Users**.

2. While creating or editing a user, go to **Device** and select a DECT handset, such as .

3. Select **Add new base** from the list.

4. In the Add new base unit window, select a base model, enter a name, and click **Add device**.
   The new base appears in the **Base device**.

5. Follow the instructions to activate your device before the first use.

6. Click **Save**.

Generating the report for available devices allows administrators to download and access the information they need to activate phones prior to going live, for example. The report includes: MAC address, MAC password, device model, extension number, activation code, site, activation status, user's name, and the number of users. You can activate a device remotely.

To generate devices report:

1. Go to **Home > Devices**.

2. Select a device model from the list, and click **View device report**.

3. Click **Generate devices report** to download a report. An excel sheet is downloaded with the device information.

FAQ

Refer to the following frequently-asked questions for more information:

You may need more handsets for your growing company. You can add up to efour handsets to your Yealink DECT base. Plug in the DECT handset. The Initial handset in the Kit box and the base are paired together at the factory. All other handsets need to be paired to the base and are activated individually.

1. From the main menu in 8x8 Admin Console, go to **Home > Users**.
2. Select a user to assign the handset to.
3. Select a handset from the **Device** drop-down menu.
4. Select a base from the **Base device** drop-down menu.
   If you are selecting an existing base that is already activated, you do not need to activate it again.
5. Click **Save**.
   The user is saved with a DECT handset.

You may have a broken or non-functioning handset that you like to replace. If the handset is for the same user, you do not need to do anything from 8x8 Admin Console. Use the new handset to cancel the old base and then pair it with the new base.

1. From the DECT handset, select **Menu > Settings > System Option > Cancel Base** and choose the base you are canceling.
2. Click **Yes** to delete the base.
3. Turn on the new base you wish to pair the handset to.
4. When it shows a solid green light, hold the locator button on the side of the base for about four seconds, until the status indicator flashes red.

5. Press and hold the **OK** soft key on the handset until the display reads: "Please wait..." It may take a couple of minutes. The phone display reads "Registered" and the light on the base goes solid green again. It also shows a Handset and a number. The handset is paired with the base unit. The handset may download some files.

You may have a broken or non-functioning base that you like to replace. For convenience, better choose the user that is allocated to port 1 in the current base.

1. From the main menu in 8x8 Admin Console, go to **Home > Users**.

2. While editing a user, select the handset from the **Device** list.

3. Select **Add new base** from the **Base Device** list.

4. Select the base type and give it a name.

5. Follow the instructions to activate your device before the first use.

6. Click **Save** to save the user.

You may have a user who has left the company and you need to assign her handset to a new team member. To re-assign a DECT handset, find another user and assign the device to.

1. From the main menu in 8x8 Admin Console, go to **Home > Users**.

2. Choose a new user you like to assign the handset to and click **Edit**.

3. Select the DECT handset model from the **Device** drop-down menu.

4. Select the existing **Base device** and click **Save**.
   If you have activated the base already, you do not need to activate it for the new handset.

Analog Telephone Adapter (ATA) is used to connect a standard analog phone or fax machine to 8x8 services through your Internet connection.

1. From the main menu in 8x8 Admin Console, go to **Home > Devices**.

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2. Check your device inventory for an ATA, or click **+Add device model** to add a new ATA.

3. Open the **Users** page.

4. While editing a user, go to **Device** and select either an **Analog fax device** or **Analog voice device**.
   Selecting a specific fax or voice device ensures the optimum voice and fax quality in the system.

   > **Note:** You can assign one device per user. If you want to have both fax and voice devices, you need to create two users. Create a user for fax machine and assign the analog fax device to it.

5. Click **Select ATA terminal**.

6. Specify a **Port** number. Only the available ports are presented to you. You can determine what port you are connecting your terminal to.

7. You must activate your device before the first use.

8. Click **Save** to save the user.

To download the activation codes:

1. Go to **Home > Devices**.

2. Select a device model from the list, and click **View device report**.

3. In the Devices > Details page, click **Generate devices report**. An excel sheet is downloaded with the device information such as: MAC address, MAC password, device model, extension number, activation code, site, activation status, user's name,

and the number of users. You can activate a device remotely.

	A	B	C	D	E	F	G	H	I	J	K	L
1	MAC Address	MAC Password	Device Model	Extension	Activation Code	Site	Status	User	Number Of Users			
2	0004f28a2855	kSlAfGXr	Polycom Soundpoint IP 550	1013	2.35602E+12	SanJose1-Sales-ONEL	Not activated	Sasha Solovey	1			
3	0004f26a2845	kSlAfUXr	Polycom Soundpoint IP 550	1100	7.3272E+12	SanJose1-Sales-ONEL	Activated	Lisa Black	1			
4	0004f26a2575	kSlAfUTr	Polycom Soundpoint IP 550	1132	8.3272E+12	SanJose1-Sales-ONEL	Not activated	Sue Johnson	1			
5												
6												
7												
8												
9												
10												
11												
12												
13												

Deliver 8x8 Work apps and plug-ins to users

You need to install a 8x8 Work app (such as the 8x8 Work desktop or mobile apps) to take advantage of the capabilities of 8x8 8x8 Work. The 8x8 8x8 Work softphone includes everything your desk phone can do, and transforms your computer or mobile device into a feature-rich, web-based phone. Using your 8x8 8x8 Work voice service, you can make, take, and transfer calls, and more. You can install and use any of the following 8x8 Work apps based on your preference and work requirements:

The 8x8 8x8 Work for Desktop offers all the functionality of the 8x8 Work for Web in a stand-alone application for Windows and Mac. The 8x8 Work for Desktop is perfect for users who regularly use the same work computer and need to be reachable by phone or IM whenever they are online. For details, please refer to the 8x8 Work for Desktop user guide.

To access the 8x8 Work for Desktop:

To sign in to the desktop application, you must download and install the application on your system. Go to the following links to download and install the app:

- As a Windows user
- As a Mac user

In addition to providing a secure login to the 8x8 Work softphone and contacts, the 8x8 8x8 Work for Web also offers key unified communication features, such as presence

management, video chat between your employees, and access to your 8x8 Work service. For details, please refer to the 8x8 Work for Web user guide.

To access the 8x8 Work for Web:

Logging in to 8x8 applications is quick and simple. You can log in using your 8x8 credentials or via Single Sign-On from your company's preferred identity management system:

- Log in using 8x8 username and password: Access all 8x8 applications you subscribe to using your 8x8 username.

- Log in using SAML SSO: Log in to 8x8 apps using your company's identity management system, such as Okta, Microsoft ADFS, or OneLogin, if enabled. Access all services available to you using your standard company login.

- Log in using Google SSO: Log in using your company Google Apps credentials to authenticate into 8x8 apps, if enabled. Access all services available to you using your standard company login.

As an 8x8 customer, connect to your 8x8 Work phone service from any Wi-Fi zone or 3G/4G network. Once you've installed the app, you can log in to your 8x8 8x8 Work phone system from your mobile device, and start making and receiving phone calls as though you were using your office phone. Your Caller ID even displays your office phone number! All your 8x8 low-cost calling rates apply, so calling from your mobile device has never been cheaper. Avoid data roaming charges when outside the US by turning off data roaming and using Wi-Fi hotspots instead of your 3G/4G network; since your calls are charged under your 8x8 calling plan, you don't have to deal with international call roaming charges.

To install the 8x8 Work for Mobile for iOS:

Go to the iPhone App Store and search for **8x8 Virtual Office**. On finding the app, select it and tap **Install**. Tap the application icon to launch the application once you have completed the installation. At the prompt, enter your 8x8 Work extension username and password, and tap **Sign In**. For details, please refer to the 8x8 Work for Mobile user guide for iOS.

As an 8x8 customer, connect to your 8x8 Work phone service from any Wi-Fi zone or 3G/4G network. Once you've installed the app, you can log in to your 8x8 8x8 Work phone system from your mobile device, and start making and receiving phone calls as though you were using your office phone. Your Caller ID even displays your office phone number! All your 8x8 low-cost calling rates apply, so calling from your mobile device has never been cheaper. Avoid data roaming charges when outside the US by turning off data roaming and using Wi-Fi hotspots instead of your 3G/4G network; since your calls are charged under your 8x8 calling plan, you don't have to deal with international call roaming charges.

To install the 8x8 Work for Mobile for Android:

Go to the Google Play Store and tap **Apps**. Search for **8x8 Virtual Office**. On finding the app, select it and tap **Install**. Tap the application icon to launch the application once you have completed the installation. At the prompt, enter your 8x8 Work extension username and password, and tap **Sign In**. For details, please refer to the 8x8 Work for Mobile user guide for Android.

Install plug-ins

If you use Skype for Business to handle calls, or Google Calendar or Microsoft Outlook to schedule meetings, you can integrate with the 8x8 Work for Desktop by installing the following plug-ins:

Once you install the Microsoft Integration plug-in, you are ready to use the 8x8 Work for Desktop to call people in Skype for Business. In combination with Skype for Business, you can use the full version of the 8x8 Work for Desktop to use a broader range of features. You can place calls from your Skype for Business contact list, chat windows, or dial pad, and synchronize 8x8 Work contact status with Skype for Business.

For details the Skype for Business plug-in, please refer to how you can:

- Set up integration with Skype for Business.
- Use call integration with the Skype for Business plug-in.

Schedule Virtual Office meetings directly from Google Calendar and Microsoft Outlook using their respective 8x8 Virtual Office Meetings plug-ins.

For details on the Google Calendar plug-in, please refer to how you can:

- Set up integration with Google Calendar.
- Create meetings with the Google Calendar plug-in.

For details on the Microsoft Outlook plug-in, please refer to how you can:

- Set up integration with Microsoft Outlook.
- Create meetings with the Microsoft Outlook plug-in.

Set up 8x8 Frontdesk

8x8 Frontdesk is an optional add-on feature for 8x8 Work business phone service. 8x8 Frontdesk's sophisticated call processing capabilities and insights allows receptionist to efficiently handle both internal and external caller's needs in getting to the right resources quickly. This browser-based software works in tandem with a Polycom IP phone.

Depending on your subscription and license type, you can see 8x8 Frontdesk capability in 8x8 Admin Console. When you allow users to access the 8x8 Frontdesk console, they can log in to 8x8 Frontdesk and process or transfer the incoming calls. You can add any user as the frontdesk receptionist as long as the frontdesk capability is enabled for the user and the user has a DID.

As a 8x8 Frontdesk user, you can:

- Handle calls that come in to your business: receive calls, transfer calls to the right contact or auto attendant, and park the calls.

- Chat or send messages to anyone in your contact directory.

Use cases

Let's say the AcmeJets legal office needs to get its phone system set up. It has one main number and three phones for their legal advisers. The phone rings only at the receptionist's desk. The majority of the calls are incoming, screened and transferred by the receptionist. The receptionist has a user account with enabled 8x8 Frontdesk capabilities. She logs in to 8x8 Frontdesk and manages calls coming to the legal office, and transfers them to the legal advisers or the auto attendant for more menu options.

Enable 8x8 Frontdesk

Depending on your subscription and license type, you may see Switchboard Pro capability. You can then enable the Switchboard Pro capability for any user in the site:

To give users access to Switchboard Pro:

1. Go to **Home > Users**.

2. Add a new user, or click ✎ to edit an existing one.

3. Go to **Services and permissions** .

4. Select **Enable Frontdesk** toggle On. It allows access to the 8x8 Work receptionist and operator console application for live call handling and phone call management.

   If you have enabled sending an email, the user receives a Welcome Email containing the login information and password link. Use the credentials to log in and access the 8x8 Frontdesk application. See the 8x8 Frontdesk user guide for more information.

   If you like your site's receptionist to be a 8x8 Frontdesk operator, after you enable the frontdesk capability for the user:

   a. While editing a site, go to **Voice Service Settings**.

   b. Add the user as the **Receptionist**.

   c. Select a number as the site's **Main Line Number**.

d. Go to **Home > Users**.

e. While editing the same user's account, assign the main line number to the user in **Users > Voice Basic Settings > Phone Number**. See how to Add Users.

Add greetings

Greeting is a short message presented to callers by the 8x8 Frontdesk receptionist when a call comes in. The greeting serves as a reminder for the receptionist to greet the callers with a particular message that is intended for those callers.

To add greetings:

1. Go to **Home > Receptionist greetings**.

2. Click **+ Add greeting**.

3. Select a phone number from the list of available numbers. The greeting will be linked to this phone number. When a call comes into this number, the receptionist can view this message and greet the caller appropriately.

4. Add the greeting text.

5. Select a site to auto-filter the phone numbers in the contact directory to entries from that site so that the receptionist can quickly navigate through the filtered list and direct an incoming call. This is optional.

6. Click **Save**.

When an incoming call is received by a receptionist on the 8x8 Frontdesk for this number, the greeting message pops allowing the receptionist to greet the caller appropriately before directing the call to the intended users or departments..

Click **Generate greetings report** to get a consolidated report of all greeting messages associated with phone numbers and corresponding users.

FAQ

Refer to the following frequently-asked questions for more information:

Switchboard Pro inherits the extension's simultaneous call capacity when it is assigned to the user; by default, the capacity is set to two calls. You can use Line Keys for more call capacity. Contact 8x8 Support for more information.

Yes, you can have more than one 8x8 Frontdesk user, but you must enable one user's frontdesk capability at a time by editing their User accounts.

- To edit a greeting, go to **Home > Receptionist greetings** and click next to the desired greeting.

- To delete a greeting, go to **Home > Receptionist Greetings** and click next to the desired greeting.

Manage call recording

With call recording capability, 8x8 users can record calls and meetings, listen to, filter by date and type, download, and delete. Phone system and contact center administrators can configure call recording settings per user and can access call recordings using the call recording app.

Once a call is recorded, you can access it under the main menu **Home / Call Recordings** screen. If a user deletes a recorded call on their end, it still shows up for the supervisor and in the Configuration Manager. See how to set up call recording for each user.

> The new call recording app is not available to 8x8 Contact Center users without a unified login. These users can continue to access and download the recordings using an FTP client. Learn more.

Access call recordings

To access call recordings:

1. Go to https://login.8x8.com.

2. Enter your user credentials and click **Login**.

3. In the **8x8 Application Panel**, select the **Admin Console** tile.

4. The **Admin Console Home** screen displays. Select the **Recordings** tile.

The **Home / Call Recordings** screen displays. You can access call recordings from here.

Manage recordings

You can manage recordings by following these instructions:

To view call recordings by date:

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1. From the **Home > Recordings** screen, click **Today** ⬚.

2. Select a time range from the selections on the left, or select a date or range of dates directly in the calendar.

3. Click **Save**. All call recordings display according to the selected date range.

To view call recordings using a filter:

1. From the **Home > Recording** screen, click **Search Filters**. A drop-down listing filter types displays that lets you sort by predefined filters, exact match, consecutive characters, and incomplete match.

Filter Type	Definition
Predefined Quick Filters	Predefined filters that let you sort by: • Recent Contact Center Interactions • Recent Generic Interactions • Recent Meetings
Direction	Filter by interaction direction such as Inbound and Outbound calls.
Extension	Filter by a user's extension..
Full Name	Filter by the full name of the user or agent whose calls are recorded.
Other party	Filter by the other party.

2. Select a filter you want to use, click the drop-down options, and enter partial or full numbers or names.

3. Click **Search Filters** each time you want to add an additional filter.

4. Click **Finish** when ready to filter the list.

   The following example, using three filters, illustrates how to search for outbound calls by Agent Pablo to the other party.

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To view the details of a call recording:

1. From the **Home > Recording** screen, select the recording, right-click and select **Open Details**. A call details screen displays.

2. Scroll down to view all information.

3. You can also listen to the recording from this location.

To listen to a call recording:

1. From the **Home > Recording** screen, click ▶ next to the recording you want to listen to. A slider screen displays to the right. The recording begins to play automatically. The recording controls are located at the bottom of the slider screen and you can adjust volume, speed, and rewind or forward the recording.

2. Optionally, click 📄 to view notes associated with the recording.

3. Optionally, click ⤓ to download the recording.

To listen to and view an 8x8 Meet recording:

1. From the **Home > Recording** screen, click ▶ next to the meeting recording you want to listen to and view. A slider screen displays to the right. The recording begins to play automatically. The recording controls are located at the bottom of the slider screen and you can adjust volume, speed, and rewind or forward the recording.

2. Optionally, click 🎥 to view the meeting recording.

3. Optionally, click ⤓ to download the recording.

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To download a call recording:

1. From the **Home > Recording** screen, select the call or calls you want to download.

2. Right-click and select **Download** from the pop-up menu. The downloaded recording file displays on the bottom of the **Home / Call Recordings** screen.

3. Open the downloaded file to view or listen to the recording.

You can copy and paste the call recording information into APIs for lookup or search for the same recording in other 8x8 apps.

To copy a call recording row information to your clipboard:

1. From the **Home / Call Recordings** screen, select the call recording whose information you want to copy.

2. Right-click and select **Copy Current Row**. The row information is copied to your clipboard.

   Pasted row information displays as in the following example:

   Interaction date: 05/15/2020 12:20 AM, Full name: Agent VCC Pablo, Direction: Inbound, Duration: 00:00:10, Other party: ever, Type: Contact Center Interaction, Site: SanJose-Onel, Extension: 9999, Size: 336.3 KB

To manually delete one or more call recordings:

1. From the **Home / Call Recordings** screen, select one or more call recordings you want to delete.

2. Right-click and select **Delete**. The **Delete recording ?** prompt displays.

3. Enter **DELETE** in capital letters in the **Please type "DELETE"** field and click **Delete**.

4. Enter **DELETE** in capital letters in the **Please type "DELETE"** field and click **Delete**. The **Deleting Recordings** prompt displays. This prompt indicates how many recordings, by percentage, are left to be deleted.

5. Optionally, click **Stop** if you want to stop the deletion process for any reason. This stops the deletion process immediately, but recordings that have been deleted before you stopped the process cannot be recovered. The deletion process time varies depending on how many recordings are being deleted.

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If you do not click the **Stop** button, the process continues and selected recordings are deleted.

> **Note**: Deleted recordings are permanently deleted and cannot be recovered.

To delete one or more call recordings by filter:

1. From the **Home / Call Recordings** screen, select the check box to the left of **Interaction date**.

2. Click **Select all filtered** recordings. If filters are set up, all recordings that correspond to those filters are selected for deletion.

> **Note**: If no filter has been set up, all call recordings are selected for deletion.

3. Optionally, click **Clear selection** if you want to change your decision to delete the selected files. This clears all the selected files for deletion

4. Click **Delete** . The **Delete recording ?** prompt displays.

Delete recording?   ✕

Delete this recording from your system ?

Type DELETE

| Please type "DELETE" |

[**Delete**]   [Cancel]

5. Enter **DELETE** in capital letters in the **Please type "DELETE"** field and click
   Delete. The **Deleting Recordings** prompt displays. This prompt indicates how
   many recordings, by percentage, are left to be deleted.

Deleting Recordings

Deleting selected recordings...

100% left to delete.

Stop

---

6. Optionally, click **Stop** if you want to stop the deletion process for any reason. This
   stops the deletion process immediately, but recordings that have already been
   deleted before you stopped the process cannot be recovered.

   If you do not click the **Stop** button, the process continues all recordings that have the
   selected filter are permanently deleted. The deletion process time varies depending
   on how many recordings are being deleted.

   > **Note**: CAUTION: If no filter exists, then **all** recordings are deleted.

   > **Note**: Deleted recordings are permanently deleted and cannot be
   > recovered.

To delete all call recordings

1. From the **Home / Call Recordings** screen, select the check box to the left of
   Interaction date to automatically select all calls.

2. Click **Select all filtered recordings**.

3. Click **Delete**

🗑
. The **Delete recording ?** prompt displays.

4. Enter **DELETE** in capital letters in the **Please type "DELETE"** field and click
    Delete. The **Deleting Recordings** prompt displays.

5. Optionally, click **Stop** if you want to stop the deletion process for any reason.
    Deletion stops immediately, but recordings that have already been deleted before you
    stopped the process cannot be recovered.

    If you do not click **Stop**, the process continues all call recordings are permanently
    deleted.

> **Note**: Deleted recordings are permanently deleted and cannot be recovered.

Fields	Description
Agent ID	The agent's ID number.
Called ID	The phone number of the called party.
Caller ID	The phone number of the caller.
Direction	↙ indicates an inbound call. ↗ indicates an outbound call.
Duration	The length of the recorded call.
Extension	The user's phone extension.
Full Name	The full name of the caller.
Hold Duration	The length of time the call was on hold.
Interaction Date	The date the call occurred.
Interaction GUID	The interaction ID from the interaction server.
Other party	The phone number of the other party that is being called.
Site	The site the user is assigned to.
Size	The size of the recorded call file.
Type	The type of call interaction: 🎧 indicates a Contact Center interaction. ılı indicates a generic interaction.

Fields	Description
	indicates a meeting.
VCC Channel Name	The name of the channel this interaction was routed from.
VCC Queue Name	The name of the queue that directed this interaction to a user.
VCC Queue Number	The queue number of this interaction.
VCC transaction ID	The interaction transaction ID.

Multi-language transcription policies

> **Note:** Multi-language transcription is currently only available to Contact Center Speech Analytics customers on X Series.

With multi-language transcription policies, administrators in 8x8 Admin Console can set policies for which calls are transcribed and in what language those calls are transcribed. This let's you perform speech analytics on non-English phrases.

For example, if you have a Contact Center with queues in English and Spanish, and you can now transcribe the calls in the Spanish queue so your transcriptions are accurate to the language spoken on the call. This is a major benefit as your calls in non-English are transcribed correctly.

The administrator can set a policy at the agent or queue level, assign and unassign the transcriber and language individually or in bulk. Languages include: French (CA) , Spanish (US), and several flavors of English.

Access transcription policies

To access transcription policies:

1. Go to https://login.8x8.com.
2. Enter your user credentials and click **Login**.

3. In the **8x8 Application Panel**, select **Admin Console**. The **Home** page displays, with your Sign-in name and email address displayed at the top. Your company name is displayed in the top right corner.

4. Go to **Home** > **Transcription Policy**.

5. The **Transcription policies Contact Center** prompt displays. Click **Edit**.

6. The **Transcription policies** page displays.

Assign a transcription policy to a queue or user

To assign a transcription policy to a queue or user:

1. From the **Transcription policies** page and under **Assign language by**, select **Queue** or **User**.

2. Select the queue or user you want to assign the transcriber and language to.

3. Click the down-arrow under **Transcriber** column and select the transcriber.

4. Click the down-arrow under the **Language** column and select a language.

5. Click **Save**.

Assign a transcription policy to multiple queues or users

To assign a transcription policy to two or more queues or users:

1. From the **Transcription policies** page and under **Assign language by**, select **Queue** or **User**.

2. select two or more queues or users.

3. Click **Set Language**. The **Set language** screen displays.

4. In the **Transcriber** drop-down, select **Standard** or the agent's name.

5. Under **Language**, select the language you want associated with this queue.

6. Click **Set**. The **Transcription policies** screen displays and now shows the queue name and language.

Unassign a transcription policy from a queue or user

To unassign a transcription policy from a queue or user:

1. From the **Transcription policies** page and under **Assign language by**, select **Queue** or **User**.

2. Select the queue or user you want to unassign the transcriber and language from.

3. Click the down-arrow under **Transcriber** column and select the transcriber. This also un-assigns the language.

4. Click **Save**.

Unassign a transcription policy from multiple queues or users

To unassign a transcription policy from two or more queues or users:

1. From the **Transcription policies** page and under **Assign language by**, select **Queue** or **User**.

2. Select the queues or users you want to unassign.

3. Click **Unassign**. A prompt displays asking you to confirm.

4. Click **Unassign**, then click **Save**.

Get support

8x8 Technical Support is available 24 hours a day via web case, chat, and phone. You can easily contact our support from the application and create a Support case through the 8x8 Support portal.

Follow help and set up

Whether you need help, you can choose to use one of the following options:

- Otto chatbot, the 8x8 Virtual Assistant
- Help & Setup assistance

Otto chatbot virtual assistant

Otto, the 8x8 Support Virtual Assistant, is available to users on any page of the 8x8 Admin Console. It guides you through the setup process or provides you with instructions to set up at your convenience. Otto is available at the bottom right corner of any 8x8 Admin Console page.

To use Otto chatbot:

1. On the 8x8 Admin Console, in the bottom right corner of the page, click **Otto** to launch a session.

2. Type your question, and Otto offers to walk you through the setup process or provides you with instructions to set up at your convenience.

3. Enter your question.

> **Note**: For best results:
> - Use the populated options for help with our most frequently asked questions.
> - Enter one specific question at a time.
> - If you want to solve an error message, enter the text of the message.
> - Be specific about your query, but avoid entering account or user-specific info, such as a particular extension, or phone number

4. You may see a list of possible answers. Click each option to review the information or select the one that sounds most relevant.

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> **Note**: To see any answer within its complete Knowledge Base article context, click the header text. The article opens in a new tab or window. Give feedback on whether the answer was helpful. This will both help to improve the future performance of the Virtual Assistant and provide an opportunity to connect with live 8x8 Support.

For more details on how to get support, click here.

5. Swipe the slider ⠿ on the side of the page, if it covers anything on your page.

> **Note**: The temporary **Help and Support** menu is removed from **Otto** 💬 . Please, use the **@Report Chatbot Issues** room for any issues/feedback.

The new **Otto** 💬 version allows you to perform new actions, by clicking **Settings** ⠿ on the upper left or the chatbot:

-   **Turn on sound** 🔊 - Turn on/off sound.

-   **Change language** 🔤 - Click the preferred language you want to use in the conversation with Otto in the list that opens, and click to return to the Settings panel.

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- **Email transcript** ✉ - Enter the email address where you want to send the transcript.

- **Download Transcript** ⬇ - Download the transcript on your computer.

Help & Setup assistance

If you're still not comfortable with the Otto chatbot, you can use our Help & Setup feature from any page of the 8x8 Admin Console.

Let's say you want to update the information of an existing user in 8x8 Admin Console, but you need assistance to do this. You can use the **Help & Setup** support to guide you.

To use the Help & Setup:

1. On the 8x8 Admin Console, on the right side of the header page, click **Help & Setup**.

2. In the **Help** window that displays, click the **Help** tab to look for support.

3. Type your question, in the search bar 🔍.

4. The **Help** list displays popular items from the Web Help guides. Click the option that sounds most relevant.

5. Follow the guidance that is provided to you.

6. In the **Help** window, click the **Setup tasks** tab to learn how to perform the most relevant tasks.

7. The **Setup tasks** list displays the most important tasks. Select the first task to go through and to start working

with the 8x8 Admin Console. In addition, the window displays the percentage of the completed tasks from the total number of available tasks.

Contact 8x8 support

Users can contact the support team at 8x8 directly from 8x8 Admin Console. You can open and review your support cases, report operation issues, or ask questions regarding your system. This service only applies to 8x8 customers at this time.

To access support link:

1. Log in to 8x8 Admin Console.
2. Click **Contact support** from the top header.
   The support portal page opens including instructions of how to submit an online case or see your existing support cases. Follow the links to submit or follow up with a case.

Send feedback

1. Log in to 8x8 Admin Console for 8x8 Work.
2. Click **Send feedback** from the top-right corner of your screen.

3. Describe the issue and attach a file or image.
4. Click **Send**.

Use co-browsing

1. Log in to 8x8 Admin Console for 8x8 Work.
2. Click **Co-browsing** from the top-right corner of your screen.
3. Click **Start sharing**.
4. In the pop-up window, click **Start sharing** to generate a code that helps you initiate a secure connection with the customer support agent.

5. Communicate the code you just generated to the agent. {mf--cannot see the agents and the entire behavior}

6. To end the sharing, click **End sharing**.

Appendix A - supported addresses

8x8 Admin Console supports addresses from a wide range of countries including:

Anguilla, Barbados, Bahrain, Brazil, Bahamas, British Virgin Islands, Ivory Coast, Cameroon, China, Colombia, Costa Rica, Dominican Republic, Indonesia, Israel, India, Jamaica, Japan, Saint Kitts and Nevis, Saint Lucia, Monaco, Myanmar, Mongolia, Martinique, Malta, Mexico, Malaysia, Mayotte, Panama, Philippines, Saint Pierre and Miquelon, Saint Vincent and the Grenadines, Paraguay, Romania, Russia, Slovakia, Turks and Caicos Islands, Thailand, Turkey, Trinidad and Tobago, Taiwan, Virgin Islands, and Vietnam.