CHAMPION®

Getting Started Guide
8x8 Phone System
Administrator

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<u>Agenda</u>

Welcome to your 8x8 Phone System training. The following topics will be covered in your training session.

Physical Phone

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Questions?

Sign-off sheet and where to go if you need help.

Introduction

We are excited to introduce the 8x8 phone system to you today. The 8x8 phones and Virtual Office Desktop (VOD) give the end user significant benefits.

Here are the benefits at a glance:

Phone

- Intuitive transfer and conference buttons.
- HD Voice Capable
- "Travels with you"
- No long distance charges
- Conference bridge system (dial 556)
- 3-way calling
- Extension dialing for all champion locations on 8x8
- Intercom
- Paging

VOD

- "Remote" phone
- Visible:
  - Voicemail
  - Caller presence
  - Corporate directory
  - Fax (if applicable)
  - Meetings (if applicable)
  - Call recording (if applicable)
- Search contacts and Click-to-Dial
- Sync Outlook contacts

Other benefits:

- 8x8 phones offer freedom and reliability. They can be placed anywhere there is an Internet portal and they will keep their configuration (even if you are working from home).

- Easy to use, the last four digits are your extension.

- No maintenance is necessary on site for 8x8 phones.

- 8x8 phones offer superior call quality and reliability.

- The 8x8 phone system offers many advanced features that can lead to greater communication and collaboration throughout our company.

Polycom VVX 500 Phone Features Overview
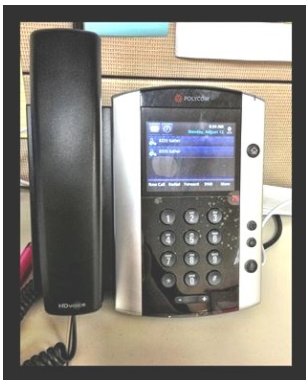
Placing Calls

1. Dial the phone number
2. Pick up the handset or press the (🔊) button

NOTE: Dialing the number <u>before</u> picking up the handset will prevent accidentally dialing the wrong extension/ phone number.

Answering Calls

Pick up the handset or press the (🔊) button

To answer a 2nd incoming call while on an active call, tap **Answer** on the touch screen. The 1st call will be put on hold.
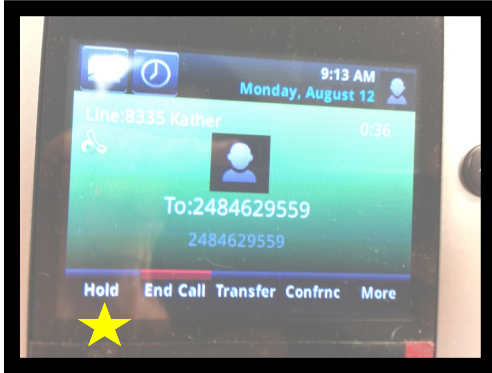
Ending Calls

Replace the handset or press the (🔊) button

To end a call on hold, navigate to calls view and highlight the held call. Tap **Resume** and tap **End Call**.

Placing Calls on Hold

1. Tap **Hold** on the touch screen.

2. To resume a held call tap **Resume.**

Transferring Calls (Warm Transfer)
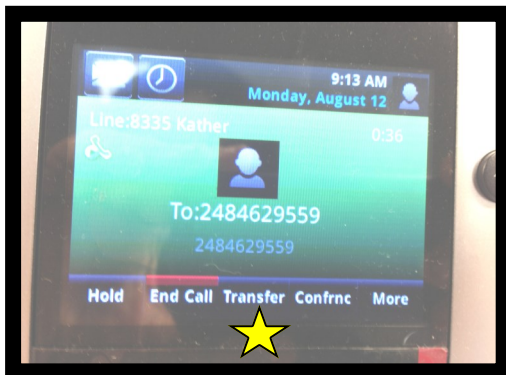
1. Tap **Transfer** and call the other party.

2. When you hear the ring back sound, or after you talk with the other party, tap **Transfer.**

Blind Transfer

1. Tap **More**.

2. Tap **BlindXfer.**

3. Type in the extension/ phone number to transfer call to.

4. Tap **Enter**.

This is how to transfer a call without talking to the third party.

Transferring a Live Call to Voicemail

1. Tap **More.**

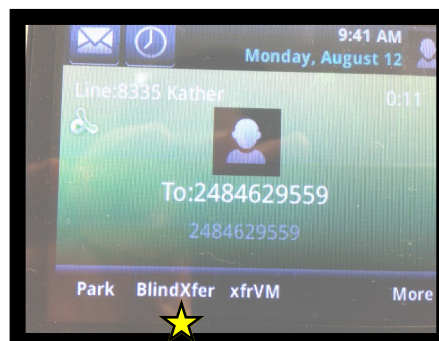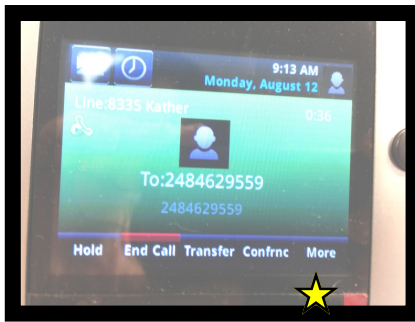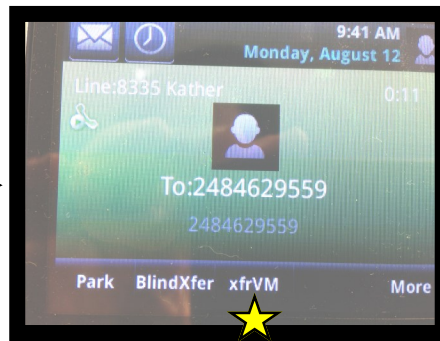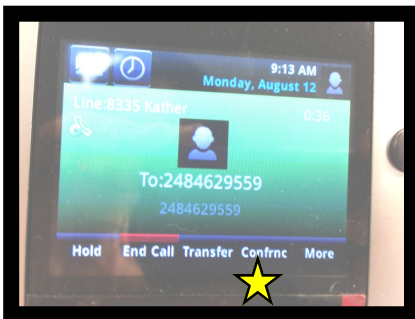2. Tap **xfrVM**.

3. Dial the extension number and press # or tap **Enter**.

Placing Conference Calls

1. Call the first party.

2. Tap **Confrnc.**

3. Dial and connect with the other party, and tap *Confrnc.*

You can:

- Tap **Hold** to hold the conference.

- Tap **End Call** to end the conference.

- Tap **Split** to end the conference and hold all participants.

Conference Bridge

Setting up a Conference Call

- Dial 556 from your 8x8 phone
- Dial 2 to Create a Conference
- Enter your extension number, then press #
- Enter your password (this is the same as your voicemail password) followed by #
- Select the type of conference you would like
    - Expires in 2 weeks
    - Non-expiring
    - Custom expiration date
- A voice playback will advise you of the conference access code and expiration date (if applicable)
- An email confirmation is sent to the email address associated with your extension
- Edit this email to include date and time of the call, call details and dial-in instructions for external participants, if needed. Then send the email to your conference participants.

Join a Conference Between 8x8 Phones

- Dial 556 from your 8x8 phone
- Select Option 1 to enter the conference.
- Enter the access code provided in the email confirmation, followed by #.
- If the first and last names are not recorded in the system or the caller is external, the caller will be prompted to record a name that will be announced when they enter the conference.

Sending a Group Page

Group paging mode enables you to broadcast a one-way announcement to people subscribed to a paging group.

1. To page a group of extensions tap the **Paging** touch key.

2. Select the group you want to page, then tap the **Page** touch key.

3. Just before the page starts you'll hear an alert tone, then begin speaking. All extensions in the group will hear the page.

Receiving a Group Page

When you receive a page the phone will beep and automatically connect to your speaker-phone.

Overhead Paging

The Overhead Paging extension can receive calls like other Virtual Office physical extensions but cannot make outgoing calls.

1. Dial the Overhead Paging extension number.

2. Enter the password if prompted (the password check is optional and depends on the configuration).

3. After hearing the bell tone, enter the number for the zone you would like to page and begin speaking.

Virtual Office Desktop

Basic Layout

You will use the contacts, phone, and history tab.

1. **Contacts–** Allows access to Champion's corporate directory, recent contacts, and personal contacts.

2. **Phone–** Allows access to your softphone which allows you to make a call, receive calls, and handle multiple calls.

3. **History–** Lets you view history of all your interactions using the Virtual Office. This includes all calls, voicemails, chats, faxes, and meetings.
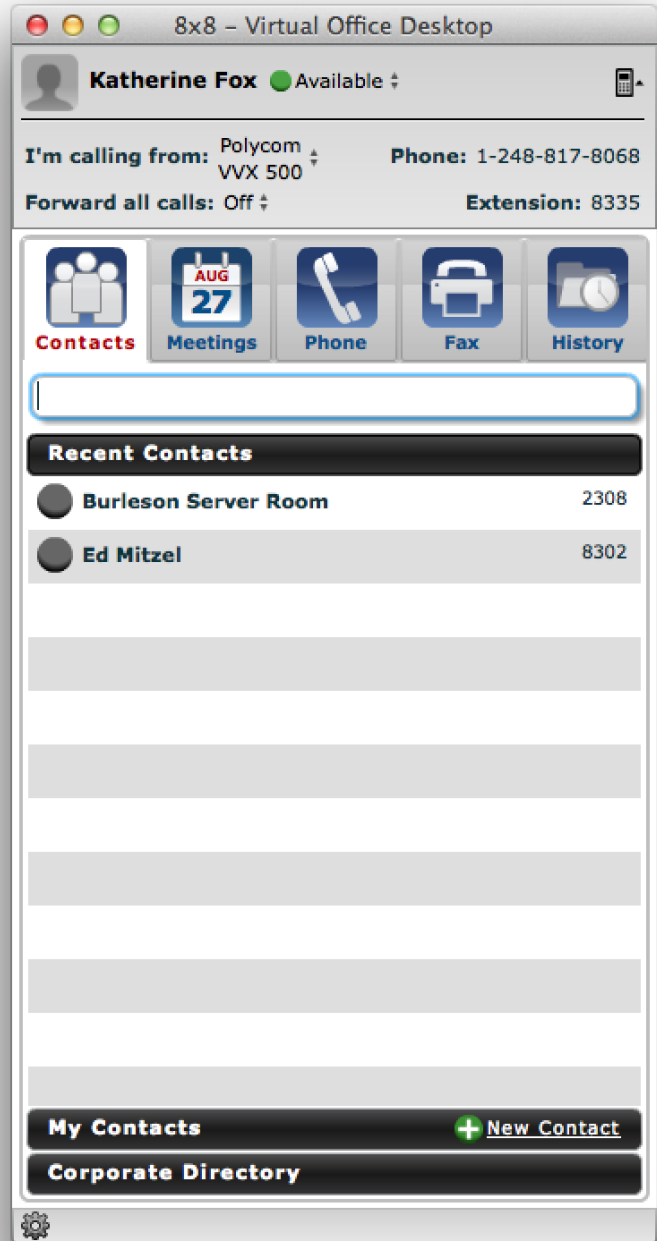
Call Park on VOD/VOO

Summary

In an effort to segment call park functionality by site, we have modified the method and process to park calls. Users will no longer use the soft key on their 8x8 phone to park call calls. Going forward, users will park calls using the Virtual Office Desktop or Virtual Office Online.

Goal

1. Prevent calls from being parked at one location and retrieved by a another
2. Assign specific call park range for each branch
3. Provide more call park extension visibility to each site

Identify available Call Park Extension

1. Click Contacts
2. Type Call Park in the contact box
3. Available Call Park extensions will have a green status icon
4. Call Park extensions that are in use will have a red status icon

Steps for Call Park
During a call...

1. Click Transfer
2. Type in Call Park
3. Select an available Call Park extension
4. Click blind transfer

Once blind transfer has been clicked, your call has been successfully parked.

Retrieving Parked Calls

The process for retrieving parked calls has not changed.

From an 8x8 Phone ....

1. Dial the extension of the parked call you would like to retrieve
2. Accept call

Call Park Extension Range for Your Site: _____
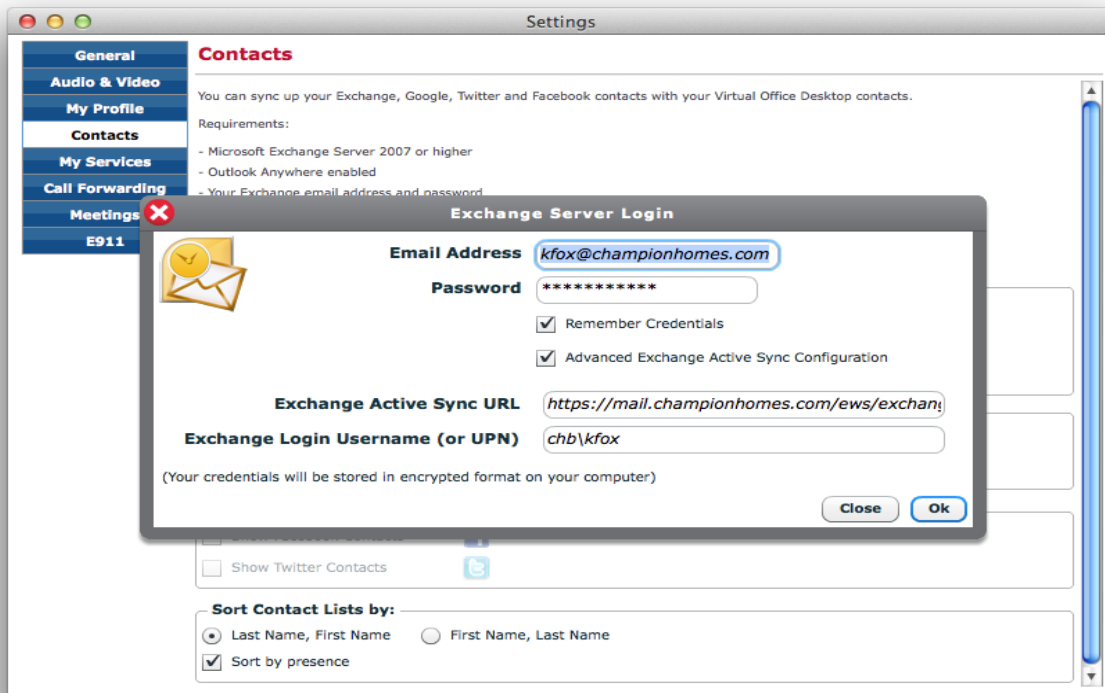
Please Note:

While each location will have their own range of Call Park extension, theoretically, users can inadvertently park calls on another locations range, if the user dials the wrong extension. It is critical for user to verify they are using their locations assigned range.

Also important to know, the call park functionality using the soft key directly from the 8x8 phone has not been turned off, but should not be used going forward.

Setting Up Outlook Contacts

1. Click on **Virtual Office Desktop** in the drop down menu.

2. Select **Preferences**.

3. Select **Contacts**.

4. Click on Show **Exchange Contacts** under **My Contacts**.

5. Enter the following information:

    - *Email address:* first initial last name example (jdoe@championhomes.com)

    - *Password:* Champion email password

6. Select **Remember Credentials**

7. Select **Advanced Exchange Active Sync Configuration**

8. Enter the following information:

    - *Exchange active sync URL:* https://mail.championhomes.com/ews/exchange.asmx

    - *Exchange login username:* chb\first initial last name (exchange chb\jdoe)

9. Click **Ok**

The screen should look like this:

8x8, Inc.

Voicemail Access

		Dial
From your extension	→	555
From another extension	→	500

From an outside line: dial your phone number and press # during greeting

Main Menu ✱

Review Messages - 1

Review Messages

	Press
New messages	– 1
Old messages	– 2
Group messages	– 3
✱ Go to main menu	

Review Messages - 1 or 2

	Press
Replay	– 1
Next/Save	– 2
Delete	– 3
Call back	– 5
More options	– 0
✱ Return to previous menu	

More Options - 0

	Press
Message Information	– 1
— External or internal	
— Priority type	
— From caller ID or extension	
— Timestamp	
Forward to extension	– 2
Call back	– 3
✱ Return to previous menu	

Group Messages - 3

	Press
Select group	– #
✱ Return to previous menu	

Change Greeting ✱ 2

Record Greeting

	Press
First/Last name	– 1
Internal	– 2
External	– 3
After hours	– 4
Lunch time	– 5
Meeting	– 6
Weekend	– 7
Vacation	– 8
Exit Voicemail	– 9
✱ Return to previous menu	

Change Greeting - 2

	Press
Review	– 1
Record	– 2
Delete	– 3
Exit Voicemail	– 9
✱ Return to previous menu	

Change User Preference ✱ 3

Change User Pref.

	Press
Password	– 1
Call waiting	– 3
Busy handling, Ring no answer handling, Internet outage routing	– 4
Email notification	– 6
Exit Voicemail	– 9
✱ Return to previous menu	

Change User Preference - 4

	Press
Busy handling	– 1
Ring no answer handling	– 2
Internet Service outage routing	– 3
✱ Return to previous menu	

Change Forwarding Rule ✱ 4

Change Forwarding Rule

	Press
Listen to rule	– 1
Set current call as forwarding rule *	– 2
Set rule	– 3
Delete rule	– 4
Exit Voicemail	– 9
✱ Return to previous menu	

Set a Specific Greeting ✱ 5

	Press
Business hours	– 1
After hours	– 2
Lunch time	– 3
Meeting	– 4
Weekend	– 5
Vacation	– 6
Greeting in use	– 0
Exit Voicemail	– 9
✱ Return to previous menu	

Misc. Options

✱	6	Announce Only Mode On/Off
✱	9	Exit Voicemail

* Takes the number from the Caller ID you are dialing in on and *immediately* sets it as your call forwarding number.

8x8, Inc.   Polycom

Polycom® VVX® 500
Business Media Phone

Quick User Guide for 8x8 Virtual Office

For phones running Polycom® UC Software 4.0.1 or later

Configurations vary and the screen displays used in this guide may not reflect those on your phone. See your system administrator for more information. For detailed information on how to use your phone, see the User Guide for the Polycom VVX 500 Business Media Phone for 8x8 Virtual Office at: http://www.8x8.com/Support/BusinessSupport/Documentation.aspx.

www.polycom.com | Rev. A | July 2012

About the Touch Screen

Tap to select and highlight screen items. To scroll, touch the screen, and swipe your finger up, down, right, or left.

To go back to a previous screen, tap **Back**.

Phone Views

Your phone has four main views: Home, Calls, Active Call, and Lines view (the default).

To change views:

- For Home view, press 🏠.
- Press 🏠 again to display either Lines, Calls, or Active Call view.
- To switch between Lines, Calls or Active Call view, swipe the screen left or right.

Note: If your phone is idle, you can access Home and Lines view. If your phone has only one call—and it's active—you can access Home, Lines, and Active Call view. If your phone has multiple calls, or one held call, you can access Home, Lines, and Calls view.

Home View

Home View displays icons you can tap to access phone functions.

Phone Line

New Call   Messages   Directories   Settings
Applications
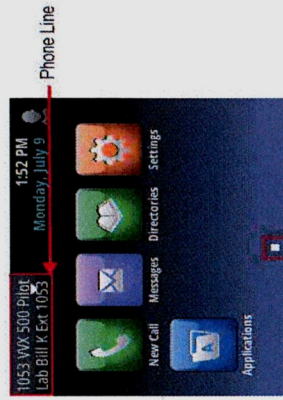
Touch and hold ▢ to display fewer icons. Touch and hold ▢ or swipe the screen to display more icons.

From Home View, tap the phone line to display your phone lines, monitored lines (if BLF Keys are enabled), and Favorites (Speed Dial Keys). — These contacts you can dial by tapping their name. To go back, tap **Close**.
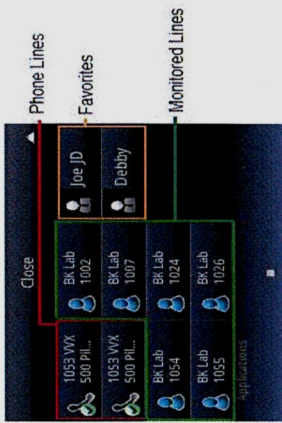
Close   Phone Lines
               Favorites
               Monitored Lines

Lines View

Lines View displays your phone lines, monitored lines (if enabled), favorites, and soft keys.

Phone Lines
Favorites
Monitored Lines
Soft Keys
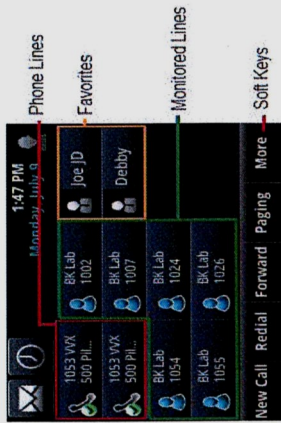
A monitored line (BLF Key) will show a flashing green bar if it is ringing and a solid red bar if it is on a call.

If your phone is idle, you can:

- Tap the phone line to access the dialer.
- Tap a favorite or an idle monitored line to speed dial to that extension.
- Tap a ringing monitored line to pick up a call (if pickup is enabled).

   Note: A monitored line (BLF Key) is part of the 8x8 Virtual Receptionist add-on.

Calls View

You can access Calls view if your phone has multiple calls in progress, or you have one held call.

Calls view displays a list of all your calls.

Active Call
Incoming Call
Held Call
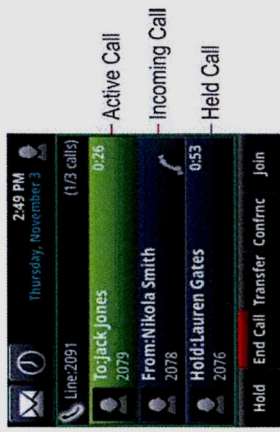
Call color indicates status:

- **Dark green:** Active call.
- **Dark blue:** Incoming and held calls.
- **Bright green:** Active call is highlighted.
- **Bright blue:** Incoming or held call is highlighted.

Tap a call to highlight it. The soft keys apply to the highlighted call.

Active Call View

If a phone line has only one call—and it's active—you can access Active Call View.
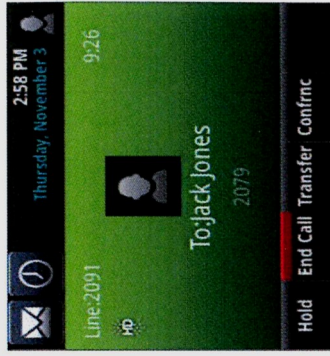
If your phone is on a live call you can:

   Swipe the screen right to reveal the Lines view, then you can

- Tap an idle monitored line to transfer your live call to that extension.

Entering Data

Use the onscreen keyboard or the dial pad keys to enter information. To backspace, tap [icon].

To use the onscreen keyboard, tap [icon].

To type with the dial pad keys, press a key repeatedly to view the character options and stop to select.

To type other characters, tap Encoding or Mode. When using the dial pad keys, use the 1, *, 0, and # keys.

About Calls

Only one call can be active at a time.

You can use the handset, speakerphone, or headset for calls. During a call, you can change modes by picking up the handset, or by pressing [icon] or [icon].

Tip: Returning to Your Calls

If you navigate away from your call(s), tap < Calls to see Active Call or Calls View again.

Placing Calls

Pick up the handset, or press [icon] or [icon]. Enter the phone number, and tap [icon].

From Lines View: Tap the phone line, enter the phone number, and tap [icon].

From Home View: Tap New Call, enter the phone number, and tap [icon].

Timesaver: Placing Calls Quickly

Tap a recent call, monitored line (if enabled), or favorite, or tap a contact's phone number in the contact or corporate directory.

Redial

To redial the last call, tap Redial

Recording Call (Optional Service)

Tap CallRecord during a live call

Answering Calls

Press [icon] or tap Answer, pick up the handset, or press [icon].

To answer a new call while on an active call, tap Answer. The current call will be held.

Ending Calls

To end an active call, replace the handset, press [icon] or press [icon]. Or, tap End Call.

To end a held call, navigate to Calls View and highlight the held call. Tap Resume, and tap End Call.

Holding Calls

From Lines, Calls, or Active Call View, tap Hold. If you're in Calls View, remember to highlight the call first.

To resume a held call, tap Resume from either Lines or Calls View.

Transferring Calls

From Lines, Calls, or Active Call View, tap Transfer, and call the other party. When you hear the ring back sound, or after you talk with the other party, tap Transfer.

Alternatively, you can tap the BlindXfer key to transfer without talking to the other party first.

Timesaver: Instant Call Transfer to Monitored Lines

If you have monitored Lines (BLF Keys) enabled, while on an active call, swipe the screen to the right to show the Lines View. Then simply tap the monitored line to instantly transfer the call to that line.

To transfer a live call to voicemail

Tap xfrVM, during a live call then dial the extension number and press #.

Parking Calls

To park a live call, tap More then tap Park.

1. Listen to the message which identifies the extension the call is parked to.
2. Then notify the intended recipient(s).

To pick up the parked call the recipient dials the extension that the call was parked to.

Intercom

- To intercom an extension, tap Intercom from Lines View, dial the number you wish to Intercom to and then tap Enter.

If you are receiving an intercom call, the phone rings, then automatically connects to your speakerphone.

Paging (If Enabled)

Paging enables you to intercom to all extensions in a pre-defined group at once.

- To page a group of extensions, tap Paging from Lines View, select the group you want to page, then tap Page. You can then begin speaking.

If you are receiving a paging call, the phone beeps, then automatically connects to your speakerphone.

LCR - Last Call Return

1. Tap LCR.
2. You can pick up the handset first, then tap LCR to place the call on your handset

Auto Attendant

To access the Auto Attendant:

1. Tap AA.
2. Follow Auto Attendant voice prompts.

Placing Conference Calls

Call the first party. From Lines, Calls, or Active Call View, tap Confmc. Dial and connect with the other party, and tap Confmc.

From Lines or Calls View, you can:

- Tap Hold to hold the conference.
- Tap End Call to end the conference.
- Tap Split to end the conference and hold all participants.
- Tap Join to join together 2 held calls.

Timesaver: Placing Conference Calls

If you have an active and held call, tap Join to set up a conference.

Forwarding Calls

Tip: Use Virtual Office for Call Forwarding

8x8 recommends using Virtual Office Online call forwarding instead of phone-based call forwarding so your call forwarding instructions are stored online instead of on your phone. If you set your call forwarding rules on your phone, they will not be in effect if your phone is disconnected from an Internet connection.

To enable online call forwarding (Virtual Office):

1. Log on to your Virtual Office Online dashboard at http://virtualoffice.8x8.com.
2. Select Settings then Call Forwarding, then select the My Rules tab.
3. Update your Call Forwarding Rules and press Save.

You can return to Virtual Office Online at any time to update your Call Forwarding Rules.

To enable call forwarding (phone based):

Tap Settings from Home View, and tap Features > Forward. Tap the forwarding type to enable, type a forwarding number, and tap Enable.

To disable phone-based call forwarding, tap Settings from home view, and tap Features > Forward. Tap the forwarding type to disable, and tap Disable.

Timesaver: Accessing Phone-based Call Forwarding

Tap Forward from Lines View then the forwarding type to enable or disable.

To enable per-call forwarding:

As your phone rings, tap Forward, enter the forwarding number, and tap Forward.

Favorites (Speed Dial Keys)

Favorites are contacts you call the most often. Favorites display in your favorites list and lines view as speed dial keys. They also display when you tap the phone line in home view.

- **To view your favorites list:** Tap **New Call** from Home View, and tap **Favorites.**
- **To make a contact a favorite:** Navigate to your Contact Directory and tap the contact. Tap **Add to Favorites,** and tap **Yes** to confirm.
- **To speed dial a favorite:** Tap the **Favorite** (Speed Dial Key) from Lines View or from your Favorites list.
- **To reorder your favorites list:** Update the contact's favorite Index number in the Contact Directory.

Viewing Recent Calls

To view your Recent Calls list, tap **New Call** from Home View, and tap **Recent.**

From the Recent Calls list, tap 🔼 to sort and order calls, tap 🔽 to display only certain calls, or tap a call record to call the person.

Timesaver: Viewing Recent Calls
Tap 🕘 from Lines, Calls, or Active Call View.

Tip: Saving Recent Callers to Your Directory
From your Recent Calls list, tap *i* next to the call, and tap **Save.** Enter additional information and tap **Save.**

Contact Directory

- **To view your directory:** Tap Directories from Home View. If a Corporate Directory is on your phone, tap Contact Directory on the directory screen.
- **To add a contact:** Navigate to your Contact Directory and tap ➕. Type the contact's information, and tap Save. To make a contact a Favorite, enter a Favorite Index number.
- **To update contact information:** Navigate to your Contact Directory and tap the contact. Tap ✏ update the contact's information, and tap Save.
- **To delete a contact:** Navigate to your Contact Directory and tap the contact. Tap 🗑 and tap Yes to confirm.

- **To search for a contact:** Navigate to your Contact Directory and tap Search. Enter search criteria, and tap Search.
- **To dial a contact from your directory:** Navigate to your Contact Directory and tap the contact. From the contact's information screen, tap the contact's phone number.

Tip: What Does a Green Star Mean?
A green star, ⭐ Indicates a Favorite (Your top ranked Favorites appear as Speed Dial Keys).

Corporate Directory

- **To search your Corporate Directory:** Tap **Directories** from Home View then **Corporate Directory.**
- Alternatively, tap **Applications** from the Home View, then **Corp Directory.** to Scroll through your Corporate Directory
- **To dial a contact from your Corporate Directory:** Navigate to your Corporate Directory and then tap the contact. From the contact's information screen, you can tap the contact's phone number.

Listening to Voicemail

Tap **Messages** from Home View, and tap **Message Center.** Tap **Connect** and follow the prompts.

Timesaver: Accessing Your Message Center
Tap ✉ from Lines, Calls, or Active Call View.

Call Queues (If Enabled)

- **To access your Call Queues:** Tap Applications from Home View, then tap **Call Queues.**
- **To log into a Call Queue:** Tap the **Log In** button.
- **To log out of a Call Queue:** Tap the **Logout** button.

Muting the Microphone

During a call, press 🔇 so other parties can't hear you.
To disable Mute, press 🔇 again.

Using Do Not Disturb

To disable ringing, tap **Settings** from Home View, and tap **Features** > **Do Not Disturb.** Tap **Enable** or **Disable.**

Timesaver: Using Do Not Disturb
To disable ringing, from the Lines View, tap **More** > **DND.** Tap **DND** again to re-enable ringing.

Adjusting Volume

To change call volume, press 🔊 during a call. To change the ringer volume, press 🔊 when the phone is idle or ringing.

Updating Ringtones

To change the incoming call ringtone, tap **Settings** from Home View, and tap **Basic** > **Ring Type.** Tap the ringtone you want.

To set a ringtone for a contact, navigate to your Contact Directory and tap the contact. Tap ✏ update the contact's ring type, and tap Save. Note: This local information may not always persist during a major upgrade to your phone.

Notes:

Monitored Lines: (BLF Keys) are part of an optional add-on called Virtual Receptionist, and are managed by your PBX administrator. Up to 6 can be configured.

Line Appearance Keys: (2 standard) can independently handle live calls. With the Virtual Receptionist add-on up to 6 Line Appearance Keys can be configured. These are also managed by your PBX administrator.

Speed Dial Keys: Your Favorites can be added and changed on your set by designating personal directory entries as favorites and then by ranking them. Your top ranked favorites are displayed as speed dial keys. These can be added up to the VVX set's limit of 12 total line keys, and speed dial keys are displayed where line keys are not being used by BLF Keys or Line Appearance Keys.

Virtual Receptionist

Virtual Receptionist (VR) is a powerful software tool that is programmed into the phones of receptionists. VR allows receptionists to monitor phones and answer other user's extensions. With VR a receptionist can handle up to six active calls and real time monitor six extensions.

Lines View

Exclusive to a phone programmed with Virtual Receptionist is the Lines View. Lines View displays your phone lines, monitored lines (if enabled), favorites, and soft keys.
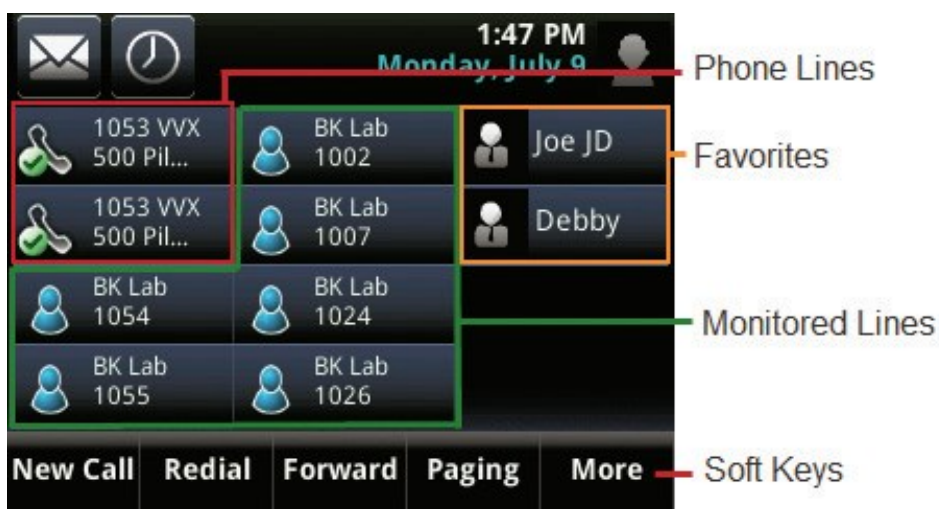
If your phone is idle, you can:

- Tap the phone to access the dialer.
- Tap a favorite or an idle monitored line to speed dial to that extension.
- Tap a ringing monitored line to pick up a call (if pickup is enabled).

Virtual Office Pro

Virtual Office Pro is an upgrade feature offered by 8x8. A Virtual Office Pro account offers three collaboration tools including Virtual Meetings, Call Recording, and Internet Faxing. If you would like a Virtual Office Pro account (it's an additional $10/mo) then please contact your IT professional onsite.

Virtual Meetings

The Virtual meetings feature of Virtual Office Pro allows you to hold unlimited web conferences with video for geographically dispersed employees and customers. Participants can share content for training, demos, and sales presentations. Holding virtual meetings will accelerate decision making and reduce travel costs.

Call Recording

Using the call recording feature allows users to focus on what's being said instead of taking notes. It's a great tool for documenting customer calls or training other employees. With this feature the user receives 1 GB of audio storage for up to 35 hours of recorded calls and meetings.

Internet Faxing

Internet faxing allows you to send and receive faxes from your computer. An email notification lets you know when a fax is received for instant communication.
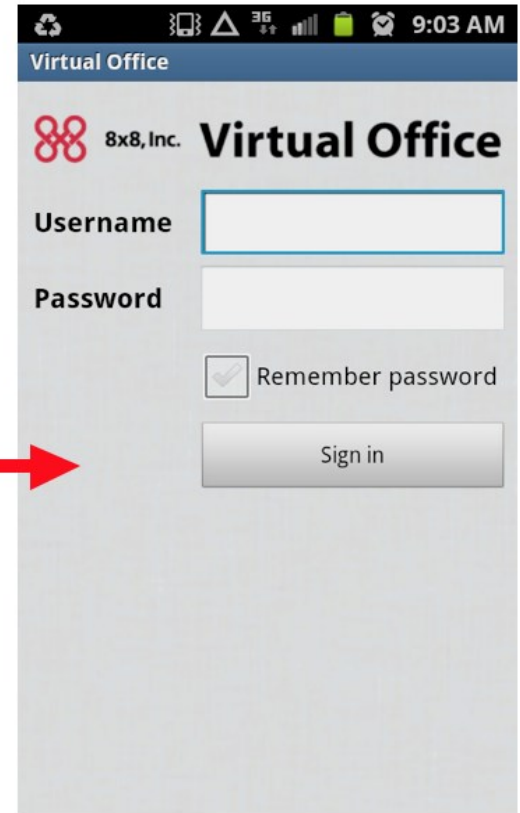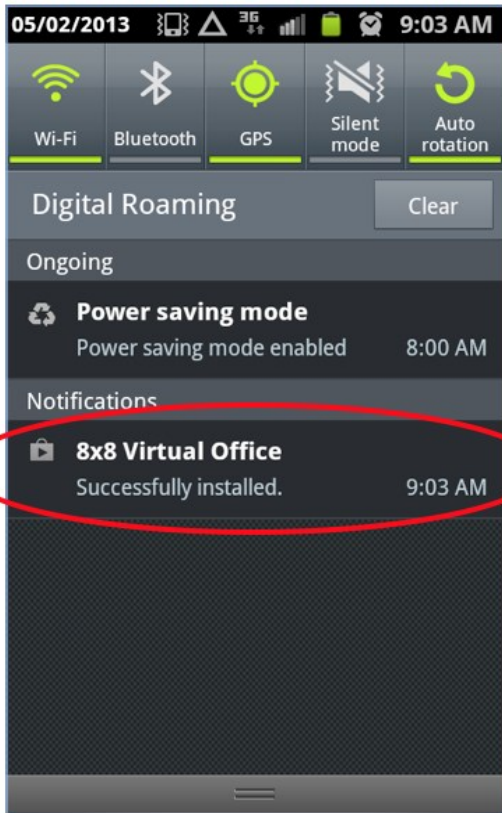
How to install 8x8 Android app:

1. Open the Play Store
2. In the search box, type "8x8 virtual office" and click on the "8x8 virtual office" link
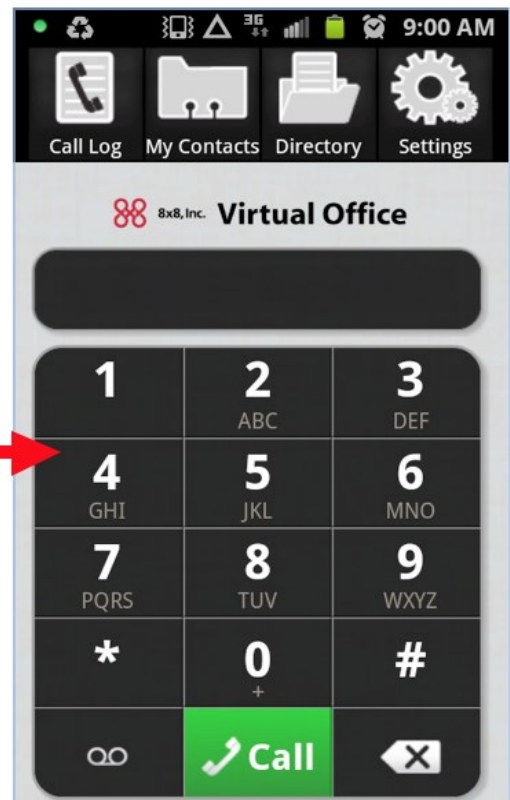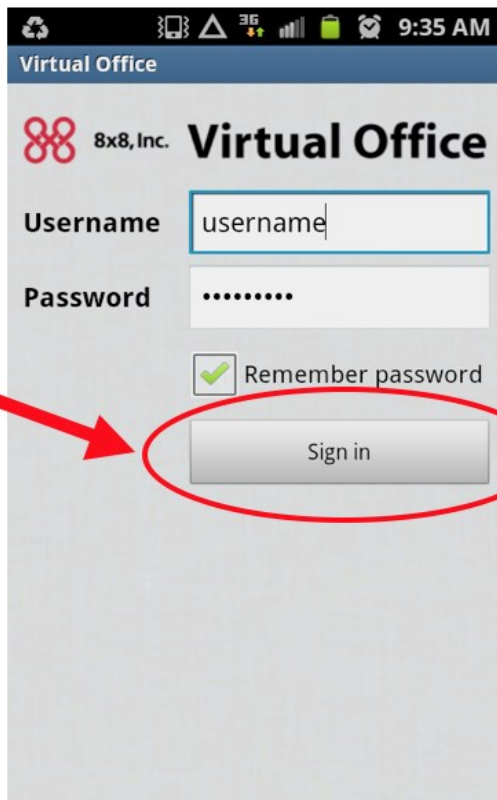3. Once the page loads, click "Install"
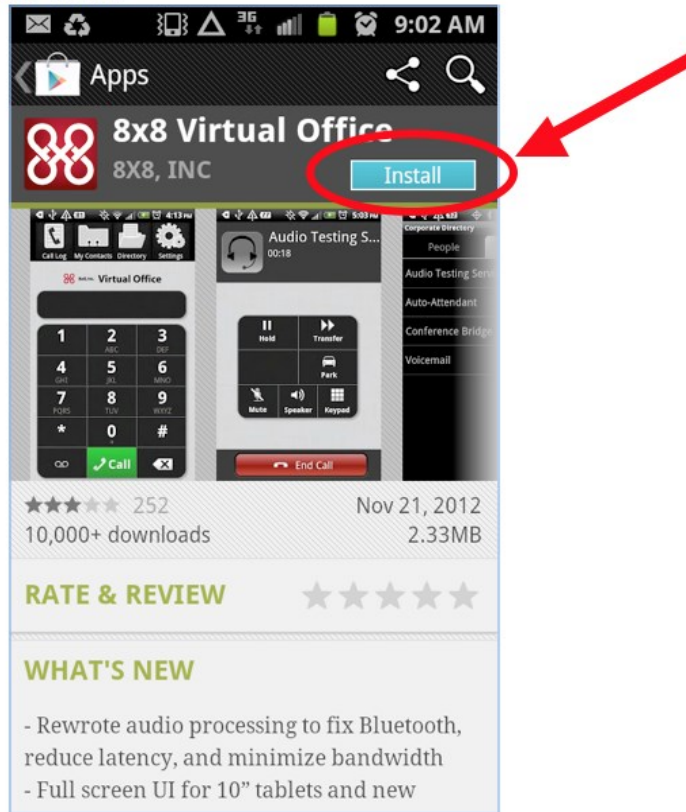
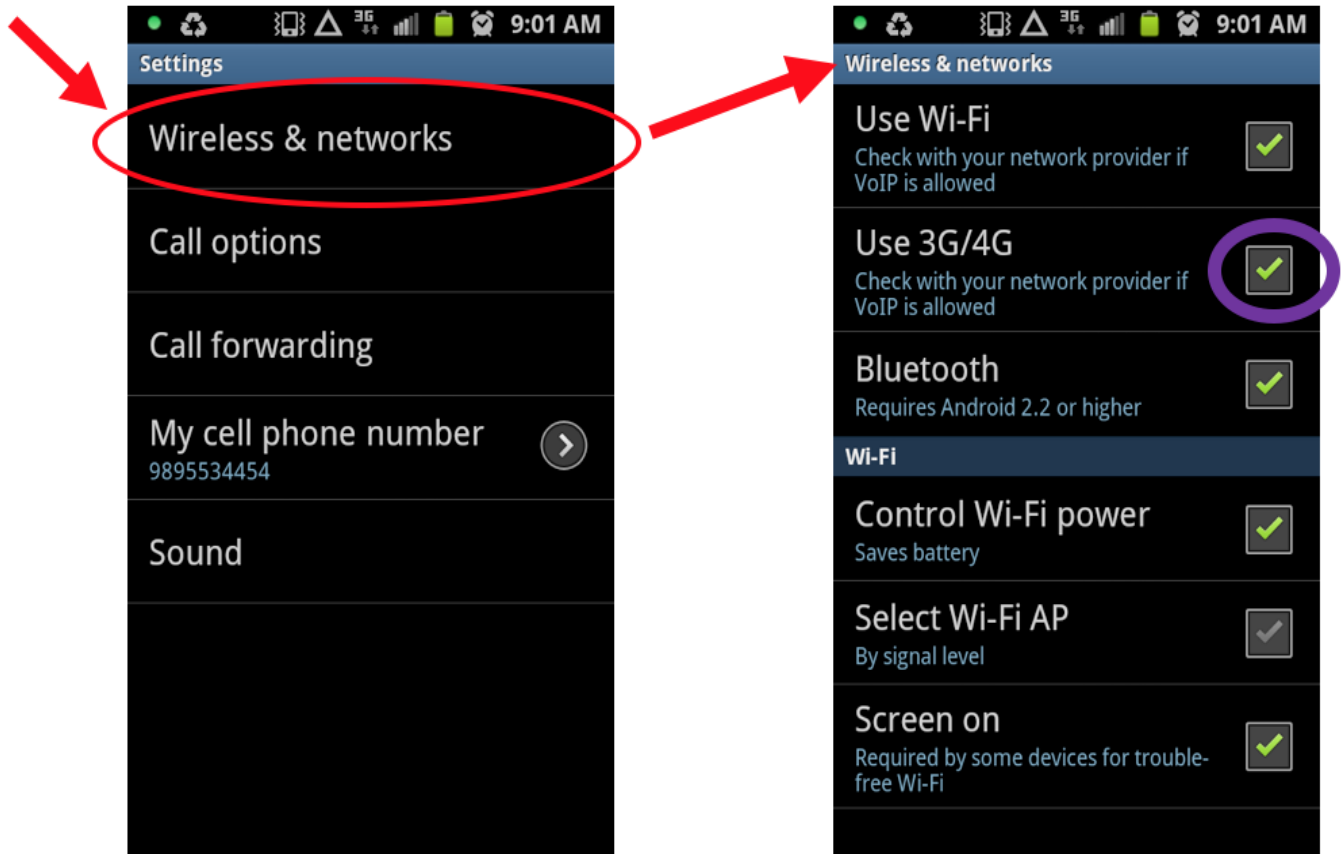4. On the next page, click "Accept & Download"
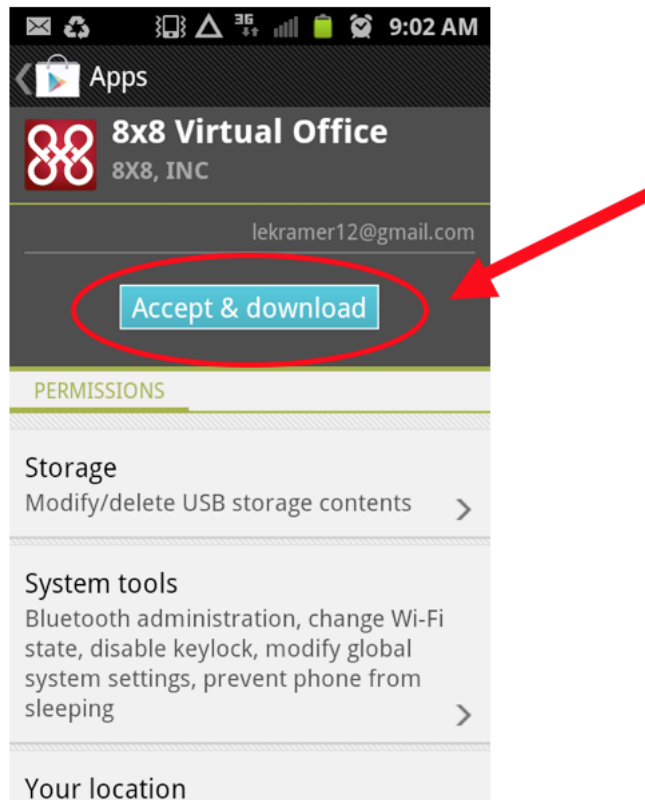
5. Once downloaded, click on the notification to open the app

6. Enter your 8x8 virtual office login information and click "Remember password" if you would like the app to remember your login information. Click "Sign in"
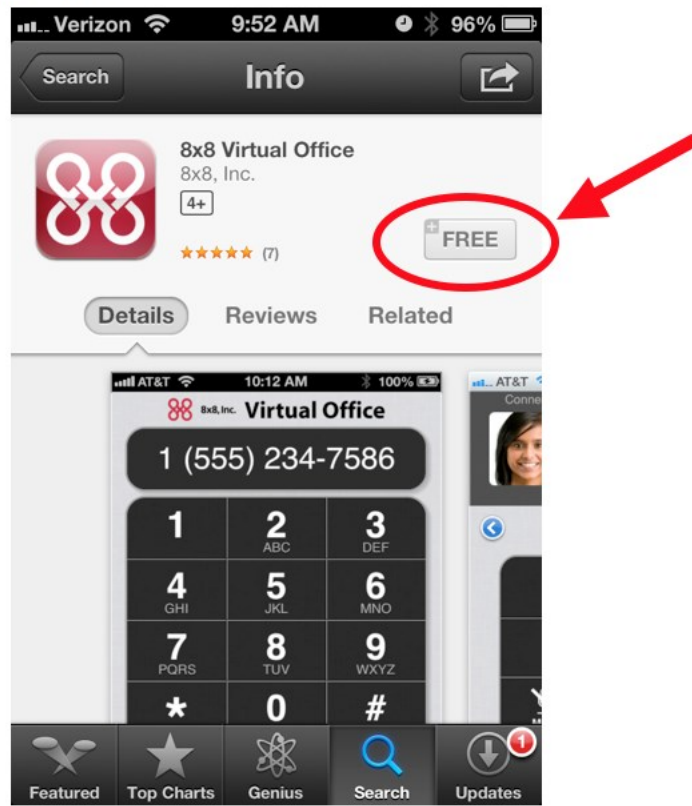
7. Click "Settings" to check Wireless/Network settings. When "Settings" open, click on "Wireless & networks"
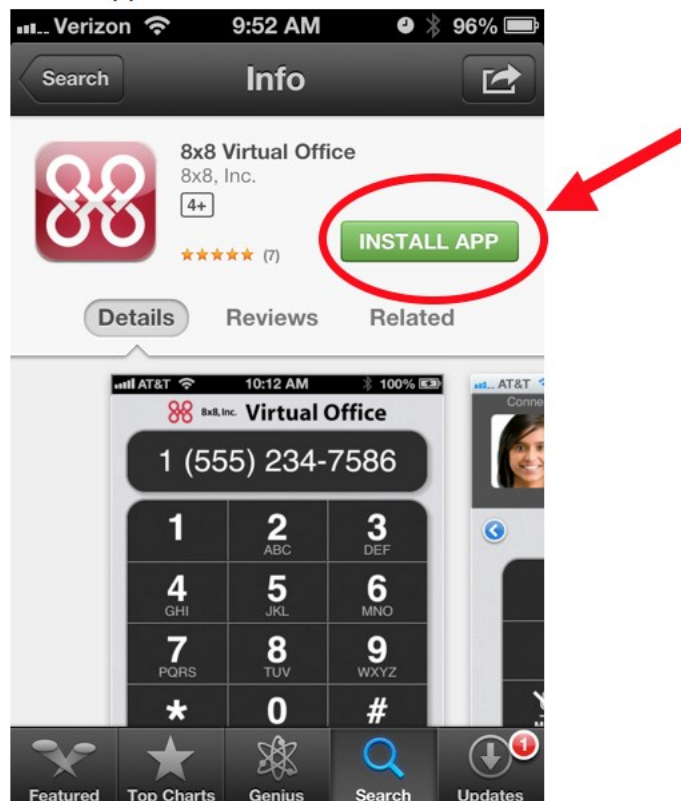
** Note: if "Use 3G/4G" is checked and you make a call, data charges may apply. **

How to install 8x8 iPhone app:

1. Open the App Store
2. In the search box, type "8x8 virtual office" and click on the "8x8 virtual office" link
3. Once the page loads, click "Free"

4. On the next page, click "Install App"

5. Once downloaded, click on the 8x8 tile on one of your home screens to open the app

6. Enter your 8x8 virtual office login information and click "ON" for "Remember password" if you would like the app to remember your login information. Click "Sign in"

7. Click "Settings" to check Wireless/Network settings. When "Settings" open, click on "Network Settings"

** Note: if "Use 3G/4G" is "ON" and you make a call, data charges may apply. **

Where to Go For Help

General Questions

We are here to support you should you need any assistance while transitioning to your new 8x8 phone. If you have a question or concern regarding use of the phone system, please email help@championhomes.com.

Call Quality Issues

Having call quality issues (echo, static, feedback, etc)? We can help**!** Please send an email to help@championhomes.com, and etam@8x8.com with the following information:

1. Inbound or outbound call

2. Originating phone number

3. Destination phone number

4. Date of call

5. Time of call

6. Time zone

7. Details of the Issue