



# Getting Started Guide

## 8x8 Phone System

### End User

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## Agenda

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

### **Physical Phone**

- Answering Calls
- Ending Calls
- Placing Calls on Hold
- Transferring Calls
  - Blind Transfer
  - Warm Transfer
  - Transferring a Live Call to Voicemail
- Conferencing
  - Placing Conference Calls
  - Conference Bridge
- Paging
  - Sending a Group Page
  - Receiving a Group Page
  - Overhead Paging

### **Virtual Office Desktop**

- Basic Layout
- Softphone
- History Tab
- Contacts Tab
- Settings
  - Contacts
  - My Services
    - \* Setting Voicemail Password
    - \* Changing Music on Hold
    - \* E911 Settings
  - Call Forwarding
    - \* Blocking Phone Calls
    - \* Forwarding Rules

### *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:

- | <b>Phone</b>  | <b>VOD</b>   |
|---|--|
| <ul style="list-style-type: none"><li>• Intuitive transfer and conference buttons.</li><li>• HD Voice Capable</li><li>• "Travels with you"</li><li>• No long distance charges</li><li>• Conference bridge system (dial 556)</li><li>• 3-way calling</li><li>• Extension dialing for all champion locations on 8x8</li><li>• Intercom</li><li>• Paging</li></ul> | <ul style="list-style-type: none"><li>• "Remote" phone</li><li>• Visible:<ul style="list-style-type: none"><li>◦ Voicemail</li><li>◦ Caller presence</li><li>◦ Corporate directory</li><li>◦ Fax (if applicable)</li><li>◦ Meetings (if applicable)</li><li>◦ Call recording (if applicable)</li></ul></li><li>• Search contacts and Click-to-Dial</li><li>• Sync Outlook contacts</li></ul> |

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

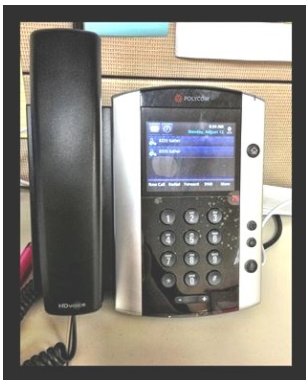



1. Dial the phone number
2. Pick up the handset or press the  button

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

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## 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.

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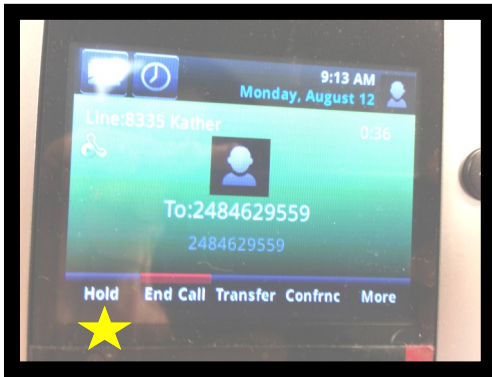
## Ending Calls



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**.

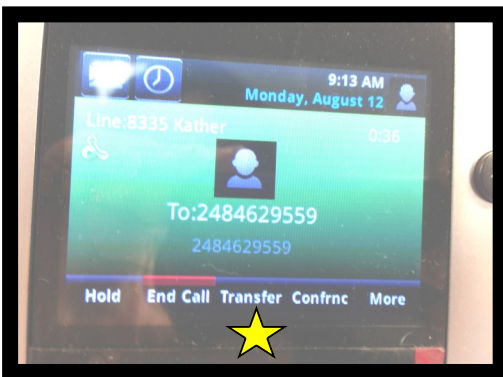
## Placing Calls on Hold



1. Tap **Hold** on the touch screen.
2. To resume a held call tap **Resume**.

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## Transferring Calls (Warm Transfer)

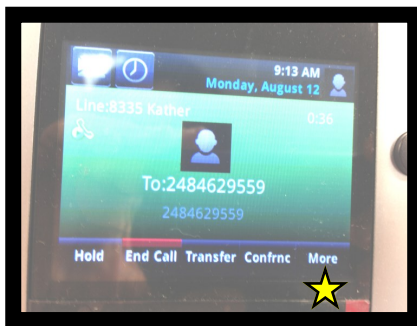


1. Tap **Transfer** and call the other party.
2. When you hear the ring back sound, or after you talk with the other party, tap **Transfer**.

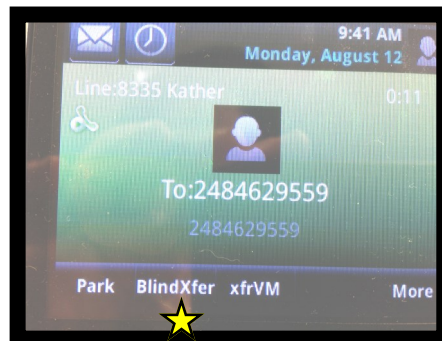
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## Blind Transfer

1. Tap **More**.



2. Tap **BlindXfer**.



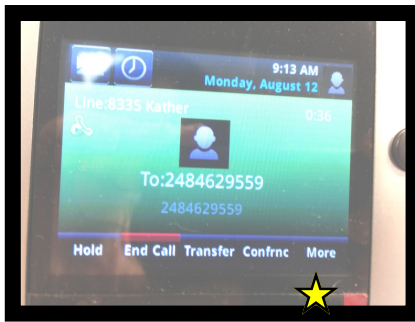
3. Type in the extension/  
phone number to transfer  
call to.

4. Tap **Enter**

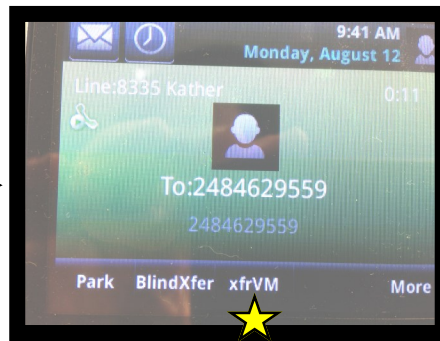
This is how to transfer  
a call without talking  
to the third party.

## Transferring a Live Call to Voicemail

1. Tap **More**.



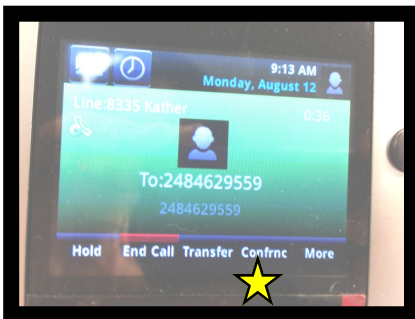
2. Tap **xfrVM**.



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

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## 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.
- Tap **Join** to join together 2 held calls.

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## 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 speakerphone.

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## 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.

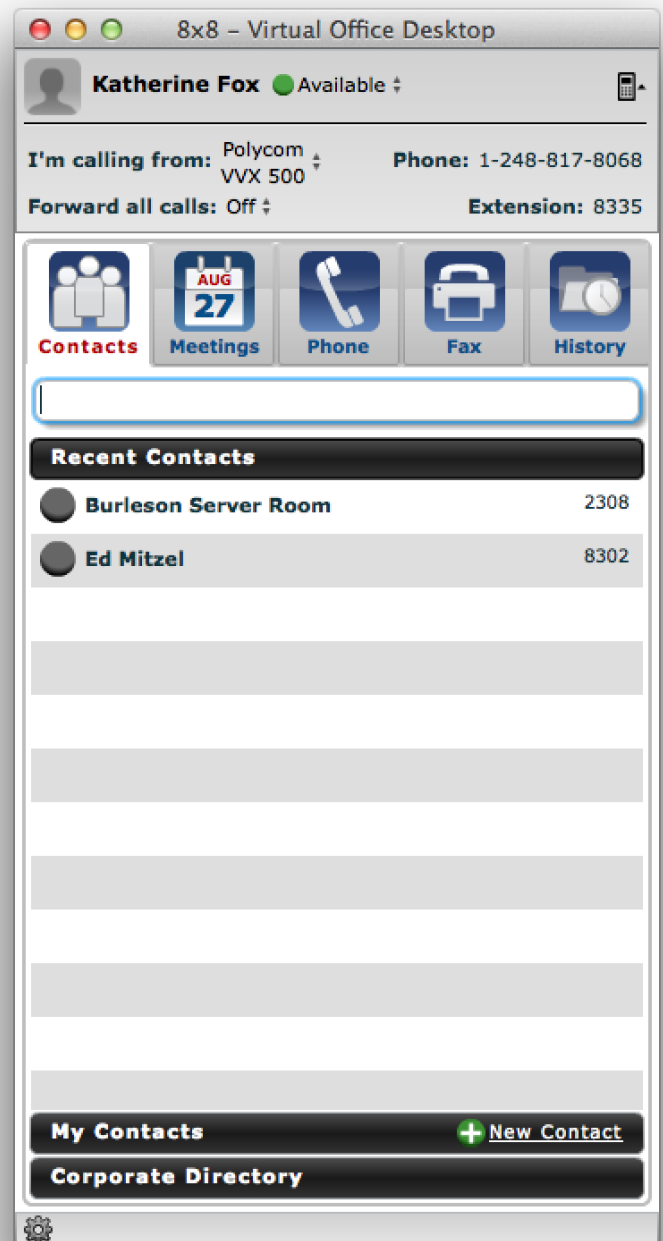


# Virtual Office Desktop

## Basic Layout

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

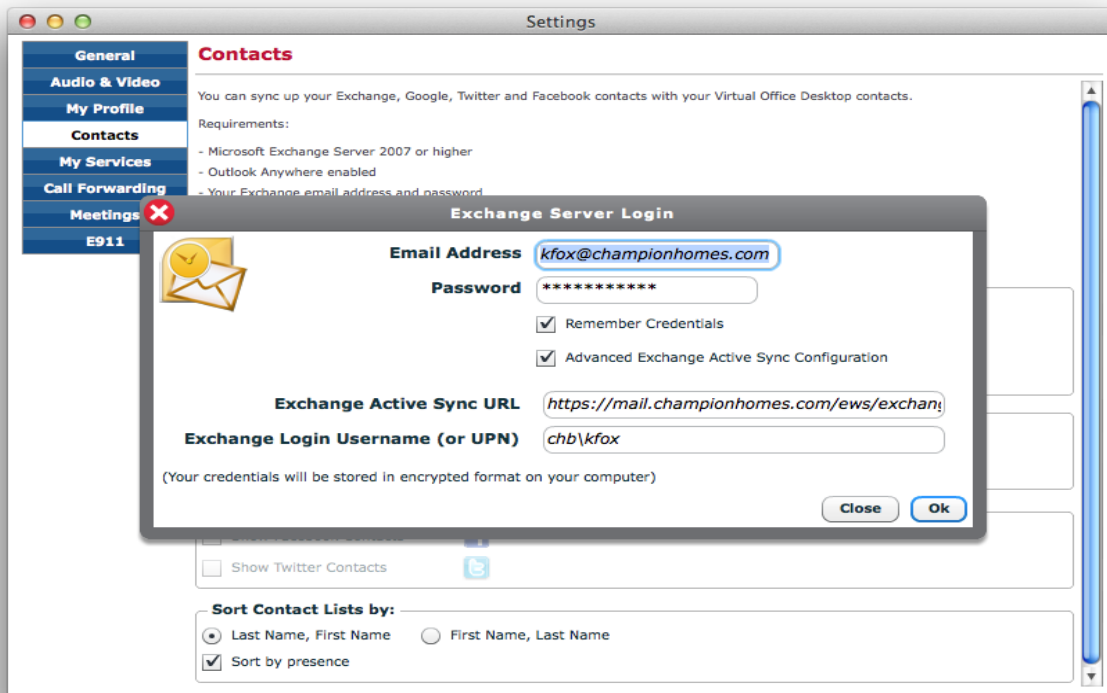
1. **Contacts**– Allows access to Champion’s corporate directory, recent contacts, and personal contacts.
2. **Phone**– Allows access to your softphone which allows you to make a call, receive calls, and handle multiple calls.
3. **History**– Lets you view history of all your interactions using the Virtual Office. This includes all calls, voicemails, chats, faxes, and meetings.



# 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:



**Voicemail Access**

From your extension	→	555
From another extension	→	500
<b>From an outside line:</b> dial your phone number and press # during greeting		

**Main Menu \***

<b>Review Messages</b>	<b>Change Greeting</b>	<b>Change User Preference</b>	<b>Change Forwarding Rule</b>	<b>Set a Specific Greeting</b>
<b>1</b>	<b>* 2</b>	<b>* 3</b>	<b>* 4</b>	<b>* 5</b>

**Misc. Options**

<b>* 6</b>	Announce Only Mode On/Off
<b>* 9</b>	Exit Voicemail

**Review Messages**

Press	
New messages	— 1
Old messages	— 2
Group messages	— 3
<b>*</b>	Go to main menu

**Review Messages - 1 or 2**

Press	
Replay	— 1
Next/Save	— 2
Delete	— 3
Call back	— 5
More options	— 0
<b>*</b>	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
<b>*</b>	Return to previous menu

**Group Messages - 3**

Press	
Select group	— #
<b>*</b>	Return to previous menu

**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
<b>*</b>	Return to previous menu

**Change Greeting - 2**

Press	
Review	— 1
Record	— 2
Delete	— 3
Exit Voicemail	— 9
<b>*</b>	Return to previous menu

**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
<b>*</b>	Return to previous menu

**Change User Preference - 4**

Press	
Busy handling	— 1
Ring no answer handling	— 2
Internet Service outage routing	— 3
<b>*</b>	Return to previous menu

**Change Forwarding Rule**

Press	
Listen to rule	— 1
Set current call as forwarding rule *	— 2
Set rule	— 3
Delete rule	— 4
Exit Voicemail	— 9
<b>*</b>	Return to previous menu

**Set a Specific Greeting**

Press	
Business hours	— 1
After hours	— 2
Lunch time	— 3
Meeting	— 4
Weekend	— 5
Vacation	— 6
Greeting in use	— 0
Exit Voicemail	— 9
<b>*</b>	Return to previous menu

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



## 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](http://www.polycom.com) | Rev. A | July 2012

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### 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).

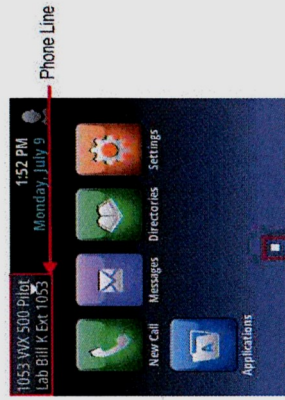
To change views:



- 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.

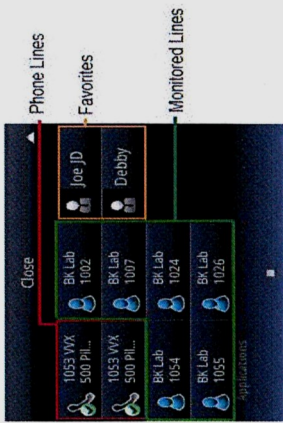
### Home View

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



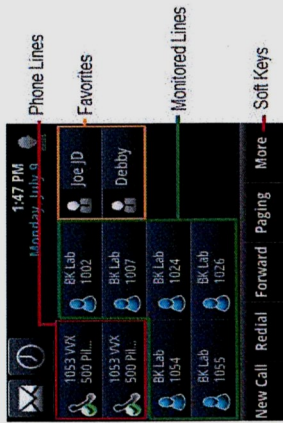
Touch and hold  to display fewer icons. Touch and hold  or swipe the screen to display more icons.

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**.



### Lines View

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

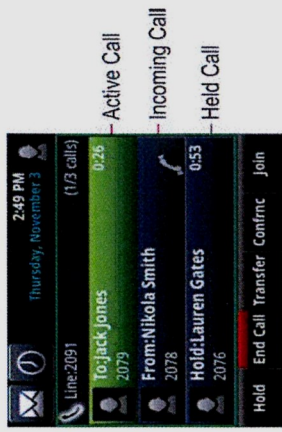
- If your phone is idle, you can:
- Tap the phone line to access the dialer.
  - Tap a favorite or an idle monitored line to speed dial to that extension.
  - Tap a ringing monitored line to pick up a call (if pickup is enabled).

**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.



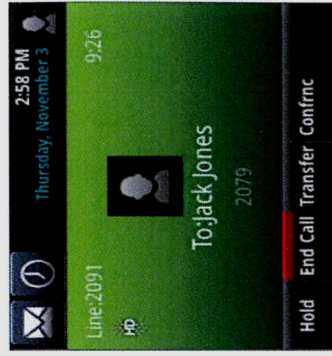
Call color indicates status:

- **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 . To use the onscreen keyboard, tap . 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  or . **Tip:** Returning to Your Calls If you navigate away from your call(s), tap  to see Active Call or Calls View again.

### Placing Calls

Pick up the handset, or press  or . Enter the phone number, and tap . From Lines View: Tap the phone line, enter the phone number, and tap . From Home View: Tap **New Call**, enter the phone number, and tap . **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  or tap **Answer**, pick up the handset, or press . 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 , or press . 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.

### 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**.

### 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.

### 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 **+** 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.



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## 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](mailto:help@championhomes.com).

### Call Quality Issues - Call Sample

Having call quality issues (i.e. echo, static, feedback, etc.)? We can help! Please send an email to [help@championhomes.com](mailto:help@championhomes.com) **and** [etam@8x8.com](mailto: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