Residential and Business
Self Service Portal User Guide

Version 2.0

Contents

Introduction to the Packet8 Self Service Portal

Welcome to the new Packet8 Self Service portal

Our new, improved Self Service portal provides you with the ability to manage your self service needs in a more convenient and elegant manner. Please click on the links below for help on how to use your most commonly used features in the new self service portal. If you have issues that are not addressed in this document, please call our Support line for additional information.

How to use your new Self Service Portal

Logging In

How do I log into the new Self Service portal?

To use the new Self Service site, you will need to login using the following pages using your existing Login ID (User ID) and Password.Online management

1. To log into the self service site, please click on the **My Account** link on the top right corner of the packet8 portal page at *www.packet8.net* to open the Self Service Login page.

2. To log into the self service site, please click on the Account Login link on the top right corner of the packet8 portal page at *www.packet8.net* to open the Self Service Login page.
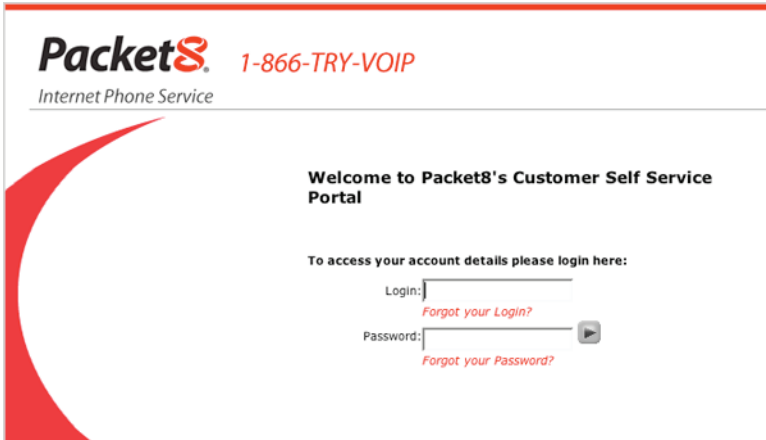
Requesting A New Password

How do I request a new Password if I have forgotten my password using the Self Service portal?

If you have forgotten your password, you can use the Login page of the Self Service portal to request a new Password

Please click on the **Password Help** link under the Password field on your Self Service Login page to open the Forgot Password page.

On this page, please enter a valid Login ID (or User ID) and click on **Continue** to open the Email New Password page.

(If you have forgotten your user name, please call Support for help.)

On this page, please verify your User ID and email address and click on **Continue** to request a new password.

A new password will be sent by the system to your email address.

Changing My User Profile Information

How do I change my User Profile information such as Name, Password, Preferences, Contact Information, Billing & Shipping Addresses using the Self Service portal?

You can use the Self Service portal to set, change or delete your User Profile information such as Name, Password, Preferences, Contact Information, Billing & Shipping Addresses.

1. To change your User Profile information, click on the **Change Profile** Info button on the left menu of the Self Service portal page.
2. Click on the **Change** button for the relevant section (e.g. Change Password button for changing password information).
3. On the following screen, please enter, modify or delete your user profile information and then click on **Save Changes** button to save your changes.

If you do not wish to save the changes, please click on the **Cancel** and **Return** link to return to the User Profile page.

Changing User Profile Information

How do I change my User Profile information such as Name, Password, Preferences, Contact Information, Billing & Shipping Addresses using the Self Service portal?

If you have placed any Orders, then you can use the Self Service portal to check the status of your new or existing Orders.

To check Order information, click on the **My Orders** button on the left menu of the Self Service portal page.

Orders for the last 30 days will be shown by default. To see more orders, please enter in a start and end date in the fields provided and click the **Search** button to show orders placed during the specified period. Click on the **Clear** button to clear the start and end date if needed.

The Order page will show relevant Order information including Order ID, Order Date, Status, Total Price, Tracking Number, and Ship Date.

Checking Order Status

How do I check the status of my existing or new Local Number Portability (LNP) request using the Self Service portal?

If you have placed a request for Local Number Portability (LNP), then you can use the Self Service portal to check the status of any LNP requests.
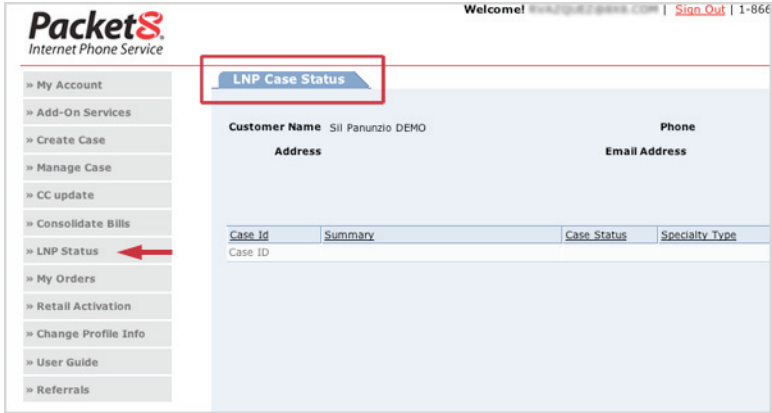
The LNP Status page will show relevant LNP information including Case Id, Summary, Case Status, Specialty Type, Detail, and Date Created.

Checking Credit Card Information

How do I add a New Credit Card information or use it for billing my account/s using the Self Service portal?

If you would like to add a new credit card, then you can use the Self Service portal to make such changes.

To add or modify credit card information, click on the **Credit Card Update** button on the left menu of the Self Service portal page.

The Credit Card page will present the Credit Card Number drop down box that you can use to select an existing credit card or add a new credit card.

To add a new credit card, select Add Credit Card from the Credit Card Number drop down box to show fields for a new credit card.

Please enter valid information for Credit Card Type (Visa, M/C, etc.), Credit Card Number, Expiration Month, Expiration Year, First Name, Last Name and Name as it Appears on your credit card.

Once you have entered this information, please review the list of your existing accounts and select which account or accounts you would like to charge to this credit card. Once you have selected the accounts, Click on the **Update Credit Card** button to ensure that any future charges for this account/s will be charged to this credit card.

Changing The Billing Credit Card

How do I change the Credit Card used for billing one or more of my account using the Self Service portal?

If you would like to change the accounts billed to an existing credit card, then you can use the Self Service portal to make such changes.

To add or modify credit card information, click on the Credit Card Update button on the left menu of the Self Service portal page.

The Credit Card page will present the Credit Card Number drop down box that you can use to select an existing credit card or add a new credit card.

To change the Credit Card used for billing one or more of your accounts, select the Credit Card Number from the Credit Card Number drop down box. Review the information for this credit card in the fields that appear - namely Credit Card Type (Visa, M/

C, etc.), Credit Card Number, Expiration Month, Expiration Year, First Name, Last Name and Name as it Appears on your credit card.

Once you have reviewed this information, please review the list of your existing accounts and select which account or accounts you would like to charge to this credit card. Once you have selected the accounts, Click on the **Update Credit Card** button to ensure that any future charges for this account/s will be charged to this credit card.

Creating A support Case

How do I report (create) a new Support Cases using the Self Service portal?

If you would like to report a new Support Case, then you can use the Self Service portal to make such changes.

This feature can save you a lot of time by avoiding any Hold times that may exist in telephone support.

To report a new Support Case, click on the **Create Case** button on the left menu of the Self Service portal page.

The Create Support Case page will show you several drop down and data entry fields that are necessary to report a new Support Case - namely Account Number, Problem Details, Product, Category, Specialty Type, Detail, Customer Reference, Summary and Details.

> *NOTE: Some drop down fields will populate based on your selection in the prior field (e.g. the Specialty Type values will depend on the Category that you have selected). In the Detail field, please provide concise and relevant information to help us act on your report in a prompt manner. Please use the Attach File button to attach any relevant files such as screen shots to help us understand your issue better.*

Checking And Updating A support Case

How do I check status of (manage) or update an existing Support Cases using the Self Service portal?

If you would like to check status of (manage) or update an existing Support Case, then you can use the Self Service portal to make such changes.

This feature can save you a lot of time by avoiding any Hold times that may exist in telephone support.

To check status of (manage) or update an existing Support Case, click on the **Manage Support Case** button on the left menu of the Self Service portal page.

The Manage Support Case page will show you a Predefined Search drop down field that you can use to select a set of search criteria for your cases - e.g. All Cases reported in the last 30 days.

Select a search criterion to view fields that are necessary to check an existing new Support Case - namely Case, Summary, Contact Name, Product, Status, and Date Created.

If you wish to update or close the Case, please click on the Case field to open the Case information page. On this page, you will find the case details including a Close button to close your case, and buttons to add new Notes or Attachments to an existing case.

If you update a case, please provide concise and relevant information to help us act on your report in a prompt manner. Please use the Attach File button to attach any relevant files such as screen shots to help us understand your issue better.

Adding New Services

How do I add new Add-On Products to my service using the Self Service portal?

If you would like to add new Add-On Products to your service, then you can use the Self Service portal to add such products.

NOTE: This feature only allows you to add Add-On products such as Virtual Number, Toll Free Numbers, etc. If you wish to add a brand new residential line or business account, please place any such orders at www.packet8.net.

To add new Add-On Products to your service, click on the **Add-On Services** button on the left menu of the Self Service portal page.
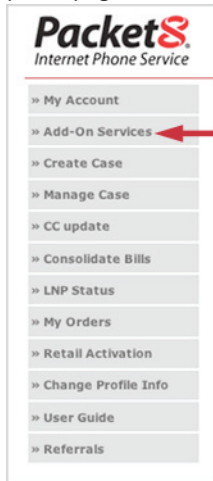
This will launch the Add-On Services page that will show you the available Add-On services.

To learn more about each Add-On service, please click on the **Learn More** button for the selected Add-On Service.

If you wish to order an Add-On Service, please click on the **Join Now** button for that service.

The Join Now button will launch a short and intuitive order process to allow you to specify the type and payment method for the selected Add-On service.

View and Managing Account Settings

How do I view and manage my Account Settings including Activation Code, Features, E911 Address & Billing Information using the Self Service portal?

If you would like to view and manage your Account Settings for your Residential or Business account, then you can use the Self Service portal to make such changes.

To view and manage Accounts, please click on the **My Accounts** button on the left menu of the Self Service portal page.

This will launch the My Accounts page that will show you a list of your new and existing accounts such as Lines, Virtual Numbers, Toll Free Numbers, etc.

For each Account in the list, this list will show you key information such as Phone Number, Service Type, Account Number, Status, and Activation Code.

Additionally, you can click on any of the inline buttons or links to view and manage more details such as those for Account Number, Features, E911 and Call Log.

The E911 and Call Log buttons will only be enabled for Active accounts and are disabled for accounts that are pending Activation.

If you click on the Account Number for any account, you can view the Account Details page that shows your subscriber information such as Name, Phone Number, Address, Activation Code, Products and also provides buttons to view Unbilled Calls, View Bills, E911 Address, Update Credit Card, and create a new LNP Request.

Viewing Bills

How do I view my prior period bills and current usage using the Self Service portal?

If you would like to view your prior period bills and current usage for your Residential or Business account, then you can use the Self Service portal to make such changes.

To view and manage Accounts, please click on the **My Accounts** button on the left menu of the Self Service portal page.

This will launch the My Accounts page that will show you a list of your new and existing accounts such as Lines, Virtual Numbers, Toll Free Numbers, etc.

Account Number	R27VO-223233-223233001-109-855982-1	Telephone	197035
Start Date	2006/04/18	Account Status	Active
Parent Account Number	P8B000000020046		

Products	Feature Settings
Broadband Phone Adapter (V)	
Unlimited Extension (EC)	Feature Settings

(View Bills) (Unbilled Calls) (E911 Address) (LNP Request)

Referral program   Order Additional E911 Stickers   Return to Packet8 Account Details

For each Account in the list, this list will show you key information such as Phone Number, Service Type, Account Number, Status, and Activation Code.

Additionally, you can click on any of the inline buttons or links to view and manage more details such as those for Account Number, Features, E911 and Call Log.

If you click on the Account Number for any account, you can view the Account Details page that shows your subscriber information such as Name, Phone Number, Address, Activation Code, Products and also provides buttons to view Unbilled Calls, View Bills, E911 Address, Update Credit Card, and create a new LNP Request.

You can click on the **View Bills** button to view PDF copies of your prior period bills.

You can click on the **Unbilled Calls** button to view your call details between a Start Date, End Date and Time Zone specified by you.

You can also access this Call Log by clicking on the Call Log button that is inline with the Account Number on the My Accounts page.

Viewing E911 Information

How do I view or change my E911 address using the Self Service portal?

If you would like to view or change your E911 address for your Residential or Business account, then you can use the Self Service portal to make such changes.

To view and manage Accounts, please click on the **My Accounts** button on the left menu of the Self Service portal page.

This will launch the My Accounts page that will show you a list of your new and existing accounts such as Lines, Virtual Numbers, Toll Free Numbers, etc.

For each Account in the list, this list will show you key information such as Phone Number, Service Type, Account Number, Status, and Activation Code.

Additionally, you can click on any of the inline buttons or links to view and manage more details such as those for Account Number, Features, E911 and Call Log.

If you click on the Account Number for any account, you can view the Account Details page that shows your subscriber information such as Name, Phone Number, Address,

Activation Code, Products and also provides buttons to view Unbilled Calls, View Bills, E911 Address, Update Credit Card, and create a new LNP Request.

You can click on the **E911 Address** button to open the E11 Address page.

You can also access the E911 page by clicking on the **E911** button that is inline with the Account Number on the My Accounts page.

On the E911 page, to add a new E911 Address, click on the **Create Address** button.

This button will link you to a new page where you can enter, validate and save your E911 Address and to check a checkbox to indicate that you understand the E911 service. If your address is not E911 serviceable, the system will also provide you with an option to save a non-E911 address.

When you save the address, you return to the E911 page where you can see a list of all addresses that you have entered to date. To designate one of these addresses as your E911 address, please click on the radio button next to it, and click on the **Save** button.

The saved address will now serve as your E911 address until you make any further changes. Please note that if you select an address that is of type = Non E911 Address, then as per FCC regulations, the system will prompt you that selecting this address will result in the suspension of your service until you switch back to a valid E911 address. If you agree, you will not be able to use your phone line to make or receive calls until you switch back to a valid E911 address.

Making a Local Number Portability (LNP) request

How do I make a Local Number Portability (LNP) request using the Self Service portal?

If you would like to make a Local Number Portability (LNP) request for your Residential or Business account, then you can use the Self Service portal to make such changes.

To view and manage Accounts, please click on the **My Accounts** button on the left menu of the Self Service portal page.

This will launch the My Accounts page that will show you a list of your new and existing accounts such as Lines, Virtual Numbers, Toll Free Numbers, etc.

 For each Account in the list, this list will show you key information such as Phone Number, Service Type, Account Number, Status, and Activation Code.

If you click on the Account Number for any account, you can view the Account Details page that shows your subscriber information such as Name, Phone Number, Address, Activation Code, Products and also provides buttons to view Unbilled Calls, View Bills, E911 Address, Update Credit Card, and create a new LNP Request.

You can click on the **LNP Request** button to open the LNP Authorization page.

This will launch the short and intuitive LNP order process to allow you to specify the details of the number to be ported and payment method for the LNP service.

Please note that not all numbers can be successfully ported and your request may be rejected either at the time of filling in the LNP Authorization form or even after you have placed your request successfully.

If you have placed a request for Local Number Portability (LNP), then you can use the Self Service portal to check the status of any LNP requests.

To check LNP Status, click on the **LNP Status** button on the left menu of the Self Service portal page.

The LNP Status page will show relevant LNP information including Case Id, Summary, Case Status, Specialty Type, Detail, and Date Created.

Setting Up, Changing or Delete Features

How do I set up, change or delete Features such as Voice Mail features, International Calling, Call Waiting, and Call Forwarding for my Residential account?

If you would like set up, change or delete Features for your Residential account, then you can use the Self Service portal to make such changes.

To view and manage Accounts, please click on the **My Accounts** button on the left menu of the Self Service portal page.

This will launch the My Accounts page that will show you a list of your new and existing accounts such as Lines, Virtual Numbers, Toll Free Numbers, etc.

For each Account in the list, this list will show you key information such as Phone Number, Service Type, Account Number, Status, and Activation Code. To set and manage Features, please click on the inline Features button to open the Manage Features page.

IPBX Company Name	abc123456
Ext Phone Number	197035
Extension First Name	
Company Main Number	197035

Account Number	R27VO-223233-
Extension Number	223233001-109-855982-1 101
Extension Last Name	
Company Name	ABC Company

☐ Permanent Caller Id Blocking [?]

☐ Do Not Disturb [?]

☐ Hide in Auto Attendant's Directory [?]

☐ Disable Call Waiting [?]

☑ Allowed to make International Calls [?]

☐ Display Company Name on Caller ID/Directory Assistance [?]
Service
Outlook Integration Set Up

Extension First Name [_____]

Extension Last Name [_____]

Email ID [_____] [?]

*Voice Mail Notification Via Email [_____ ▼] [?]

Time Zone [US/Eastern ▼] [?]

Voice Mail Settings [?]

	Forward Type	Forward Destination	Phone	Delay
1	alwaysForward	none ▼		
2	busyForward	none ▼		
3	noAnswerForward	none ▼		15
4	networkOutageForward	none ▼		

The Manage Features page allows you to configure the features listed below.

For Residential Accounts, the General Call features include 7 Digits Local Dialing, Allow international calling, Block my phone number when making calls, Enable Call Waiting, Enable Caller ID, Enable Voicemail, Voicemail Password, and Voicemail answers after (seconds).

Voice Mail features include Enable Personal Voicemail Greeting, Enable Voice Mail Timestamp, Enable Voicemail to Email, Send Notification with Attachment and Voice Email Address (where the attachment will be sent for the VM email notification).

Call Routing features include Call Forwarding, Find Me/Follow Me, Simultaneous Ring, and Call Failover and you can set relevant fields including the desired Routing Number and the Ring Duration (in seconds).

Please configure features using the adjoining field or drop down box to select the desired setting and click the **OK** button at the bottom of the page to save your settings.

Changing Or Deleting Features

How do I set up, change or delete Features, Auto Attendant, Ring Group, Extensions Manager and other configurable features for my Virtual Office Business account?

If you would like set up, change or delete Features for your Virtual Office Business account, then you can use the Self Service portal to make such changes.

To view and manage Accounts, please click on the **My Accounts** button on the left menu of the Self Service portal page.

This will launch the My Accounts page that will show you a list of your new and existing accounts such as Extensions, Virtual Numbers, Toll Free Numbers, Auto-Attendant, Ring Groups, etc.

For each Account in the list, this list will show you key information such as Phone Number, Service Type, Account Number, and Status. To set and manage Features, please click on the inline **Features** button to open the Manage Features page.

Your Virtual Office Account Details

Select a link below to confirm or change the settings of your Virtual Office features.

Subscriber Name	Sri Panunzio DEMO		Auto-Attendant Settings
			Define Ring Groups
Address	3151 Jay Street, Santa Clara, CA, 95054, USA		Company Main Number
Phone	4087271885	**Email**	Delete Ring Groups
			IPBX password for Outlook Set Up
			Directory Assistance Form

Account Number	PNB000000020046		
Start Date	2006/04/18	**Account Status**	Active

The Manage Features page allows you to configure the features listed below.

For Virtual Office Accounts, the General Call features include Allow international calling, Enable Call Waiting, Enable Caller ID, Enable Voicemail Notification, and Voice Email Address (where the attachment will be sent for the VM email notification), etc.

Call Routing features include Busy Forward, No Answer Forward, Always Forward, and Call Failover and you can set relevant fields including the desired Routing Number and the Ring Duration (in seconds).

One Number Access features can also be set for Call Forwarding including Find Me/Follow Me and Simultaneous Ring with Call Screening

Please configure features using the adjoining field or drop down box to select the desired setting and click the **OK** button at the bottom of the page to save your settings.

Additionally, Auto-Attendant and Ring Group features can be set by clicking on the main account for the iPBX on the My Accounts page and using the Auto-Attendant and Ring Group links on the top right corner of the page.

Additionally, the Extension Manager can be used to assign users to extensions and to set up limited accounts for extensions users which they can use to manage only their extension alone without viewing or changing information for any other extensions.

Define Your Ring Groups	More Info	Examples

Use the options below to tailor your Virtual Office ring groups to meet your company's requirements.

Company Name   ABC Company   **IPBX Name**   abc123456

To Delete All Ring Group Click Here

Find | View All   First ◄ 1 of 1 ► Last

Add   Delete

*Group Name [   ]

*Group Extension [▼]

*Ring Pattern [▼]   *Phone Extension

*No. of Cycles [▼]   1 [▼] Add   Delete

*No Answer Forward [555 ▼]

*Busy Forward [555 ▼]

Always Forward [▼]

Save   Back

Resources

To find the latest user guides and tools for your Packet8 Residential and Virtual Office service, please log in to your account at: *http://www.packet8.com/login*.

To access online user documents, go to your main account page and click on "resources" in the menu on the left side of the screen. You may view or download each of the files as reference.

Residential Customers
By Email:
    E-mail: p8sales@packet8.net
By Phone:
    Phone: Monday - Saturday
    5:00 AM to 9:00 PM PDT.
    1-866-Try-VoIP [1-866-879-8647]
    1-408-687-4120 outside of U.S.

Business Customers
By Email:
    virtualoffice@packet8.net
By Phone:
    Monday - Friday
    6:00 AM to 6:00 PM PDT.
    1-866-Try-VoIP [1-866-879-8647]
    1-408-687-4120 outside of U.S.

Packet8
Internet Phone Service

WARNING

Toll fraud is committed when individuals unlawfully gain access to a customers telecommunication system. This is a criminal offense. Currently, we do not know of any telecommunications system that is immune to this type of criminal activity. 8x8 Inc. will not accept liability for any damages, including long distance charges, which result from unauthorized and/or unlawful use. Although 8x8 Inc. has designed security features into its products and services, it is your sole responsibility to use the security features and to establish security practices within your organization, including training, security awareness, and call auditing to eliminate security risks.

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