Brand New in WebLink

In addition to overhauling the look and feel, we’ve taken this opportunity to add a number of brand new features and new functionality to your WebLink interface.

- **Configure Phones** *(Settings > Phones > Configure)*

  You can now configure a number of custom options per phone, including:
  - Playing tones upon specific triggers
  - Showing useful information on the phone’s display
  - Toggling the availability of features like Do Not Disturb
  - Setting up multiple lines for a phone

- **Phone Directory** *(Settings > Phones > Directory)*

  Add entries to a phone’s contact directory and set up speed dial options.
• **Number Routing**  (*Settings > Delivery > Number Routing*)

Automatically route incoming calls based on the phone number the caller dialed or the caller’s phone number. Options include forwarding to an extension, sending to voicemail, rejecting the call, and more.

**Note:** If you do not see this feature under *Settings > Delivery*, please contact Customer Care so we may enable it for your service (no charge).

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<table>
<thead>
<tr>
<th>Label</th>
<th>From</th>
<th>Action</th>
<th>Destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harassing Caller</td>
<td>5555551212</td>
<td>Reject call</td>
<td></td>
</tr>
<tr>
<td>Calling for San Diego Office</td>
<td>760</td>
<td>Call forward to</td>
<td>x82 - Sample Call Center</td>
</tr>
<tr>
<td>Calling for East Bay Office</td>
<td>510</td>
<td>Call forward to</td>
<td>x82 - Sample Call Center</td>
</tr>
</tbody>
</table>

3 routes

• **Diagnose Phones**  (*Support > Status > Diagnose Phones*)

See a list of all devices activated on your service and any errors they are experiencing. You can drill down to a specific device for more details to quickly troubleshoot.

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<table>
<thead>
<tr>
<th>Model</th>
<th>MAC Address</th>
<th>IP Address</th>
<th>Line</th>
<th>DID Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>IP-601</td>
<td>00:04:F2:05:1A:B6</td>
<td></td>
<td>1</td>
<td>(760) 477-5684</td>
</tr>
</tbody>
</table>

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**Status**

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Description</th>
<th>Suggested Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Offline</td>
<td>Phone is not connected to our servers</td>
<td>Make sure the phone cables and phone are properly connected.</td>
</tr>
</tbody>
</table>
• **Call Display**  
  (*Settings > Phones > Call Display*)

  Set what caller information shows on your phone’s display when receiving incoming calls. Beyond basic caller information, some popular alternate displays include:

  - Route (Group Name/Called Ext Name) -- *ex. “Sales Rotation”*
  - Number Dialed By Caller
  - Caller’s Wait Time
  - Custom Text

  ![Configure Polycom Display](image)

• **Link Phone Numbers**  
  (*Settings > Company > Users*)

  You can now link external phone numbers to users (ex. cell phones or home phone numbers). Forwarded calls to linked numbers will show the appropriate user in WebLink call reports.

  To access this feature, go to *Settings > Company > Users* and **Edit** a user from the User List. Click the **Link Phone #s** button to bind desired numbers.

  ![Link Phone Numbers](image)
• **Search Box**

To help you find the right information or setting, there is now a search box in the upper right-hand corner of every page.

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• **Auto Saving**

Most settings on your service no longer require you to press a **Save** button, eliminating the risk that you might forget and move on. Simply change settings as you see fit and your service will be immediately updated.

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• **Roles**

Set roles to determine what users have permission to access in WebLink. We plan to expand this feature to provide the ability to create and customize new roles with unique permissions.
Where Do I Find ... ?

We’ve revamped the navigation in WebLink with better grouping of similar features and settings. Below is a list of what you will find in each of the main navigation areas, followed by a glossary of new terms and then screenshots of where to find your favorite settings and features in the new interface.

- **Messaging**
  Check your messages, send a fax, or broadcast a voice message.

- **Settings**
  Set up or change to your system, recordings, users, phones, or extensions.

- **Reports**
  See detailed reports and user metrics for call activity on your system.

- **Support**
  Find helpful documentation and diagnostic tools or contact Customer Care.

- **Account**
  Add products, update account information, or review your billing history.

- **Call Stream**
  See real-time reporting for user status, call queues, and call park.
Updated Terminology

As you navigate the new WebLink interface, you will notice that some of the terminology has been changed.

The table below is designed to help you become more familiar with these changes and provide helpful navigation for locating the settings in the new interface.

<table>
<thead>
<tr>
<th>Previous Interface</th>
<th>New Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mailbox <em>(tab)</em></td>
<td>Messaging</td>
</tr>
<tr>
<td>Fax <em>(icon)</em></td>
<td>Messaging &gt; Send Fax</td>
</tr>
<tr>
<td>Send <em>(icon)</em></td>
<td>Messaging &gt; Send Voice Message</td>
</tr>
<tr>
<td>Messages</td>
<td>Messaging &gt; Messages &gt; Type</td>
</tr>
<tr>
<td></td>
<td>• Voice message <em>(person calls you)</em></td>
</tr>
<tr>
<td></td>
<td>• Fax <em>(document received)</em></td>
</tr>
<tr>
<td></td>
<td>• Recording <em>(conversation recorded)</em></td>
</tr>
<tr>
<td>Call Delivery</td>
<td>Settings &gt; Extensions &gt; Call Forwarding</td>
</tr>
<tr>
<td>Message Delivery</td>
<td>Settings &gt; System &gt; Message Notification</td>
</tr>
<tr>
<td>Mailbox Properties</td>
<td>Settings &gt; Extensions &gt; Voicemail Boxes</td>
</tr>
<tr>
<td>System Defaults</td>
<td>Settings &gt; Menus &gt; Menu Defaults</td>
</tr>
<tr>
<td>System Recordings</td>
<td>Settings &gt; Menus &gt; Recordings</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>User Type</td>
<td>Role</td>
</tr>
<tr>
<td>• Update Profile</td>
<td>• Settings &gt; Company &gt; My Profile</td>
</tr>
<tr>
<td>• User List</td>
<td>• Settings &gt; Company &gt; Users</td>
</tr>
<tr>
<td>Devices</td>
<td>Settings &gt; Phones</td>
</tr>
<tr>
<td>• Activate a Phone</td>
<td>• Settings &gt; Phones &gt; Activate</td>
</tr>
<tr>
<td>• Device List</td>
<td>• Support &gt; Status &gt; Diagnose</td>
</tr>
<tr>
<td>Fax Forward Number</td>
<td>Fax Forwarding</td>
</tr>
<tr>
<td>Mailbox Name</td>
<td>Settings &gt; Company &gt; Extensions</td>
</tr>
<tr>
<td>Call Announcement</td>
<td>Settings &gt; Menus &gt; Call Announce</td>
</tr>
<tr>
<td>Call Park Panel</td>
<td>Call Stream &gt; Call Park</td>
</tr>
<tr>
<td>Employee Status Panel</td>
<td>Call Stream &gt; User Status</td>
</tr>
<tr>
<td>Shop (tab)</td>
<td>Account &gt; Add Services</td>
</tr>
<tr>
<td>Minutes Used</td>
<td>Account &gt; Minutes</td>
</tr>
<tr>
<td>Order Hardware</td>
<td>Account &gt; Add Equipment</td>
</tr>
</tbody>
</table>
Manage Users

Add or update your user accounts by going to Settings > Company > Users. Users can now be assigned Roles that determine what they are allowed to see and change within WebLink.

Previous

New!
Activate a Phone

To activate a phone on your system, you now go to Settings > Phones > Activate. This will start a multi-step process similar to the previous interface that will walk you through connecting the device to your service.

Previous

Activate Phone: Identify Hardware

Enter the Mac Address for the phone you wish to activate.

Make: Polycom Model: IP-301

You will have the opportunity to activate additional phones after completing the process for this phone.

The MAC Address is located on the underside of your phone. The number circled in red below, indicates the specific location of the MAC Address on the identification decal for each phone manufacturer. Please note that each phone has a unique MAC Address and the numbers below are shown for location only.

Polycom Hardware

![Polycom Hardware Image]

Linksys Hardware

![Linksys Hardware Image]

New!

Identify Phone

Make: Polycom Model: IP-550

MAC Address: 123456789012

Polycom IP-550: This phone's unique MAC Address is located under the phone on a decal as shown in the above example.
Change System Recordings

System-wide recordings such as the auto attendant, hold music, mailbox directory, and after hours are now found under Settings > Menus > Recordings. Listen to any recording or click Change Audio for options to update.
Change Call Forwarding

Call forwarding settings are now under Settings > Delivery > Call Forwarding. As in the previous interface, you can customize the order and schedule of your entries.

Previous

New!
Groups for Call Forwarding

Forwarding groups to be used for special call distribution (ex. simultaneous ring) can now be configured by going to Settings > Delivery > Forwarding Groups.
Change Voicemail Greeting

You may listen to and change your prompt for callers to leave a voicemail message for an extension by going to Settings > Menus > Voicemail Boxes. You may also now disable the greeting entirely (a beep will play instead).

Previous

New!
Change Notification of Messages

You now set how you are notified of new voice and fax messages by going to Settings > Delivery > Message Notification. There are multiple methods of notification available, including email, text message, and an automated call.

Previous

New!
Check Messages

You can now checking your messages by going to Messaging > Messages. You will be shown your selected extension’s New folder by default and can change folder or extension as desired.

Previous

New!
Send a Fax

Rather than needing to click the Fax icon in the previous version, sending a fax now has its own page, under Messaging > Send Fax. Otherwise, the feature functions the same – upload a document and provide fax numbers for delivery.