dpcNETWORKS

Using My Site

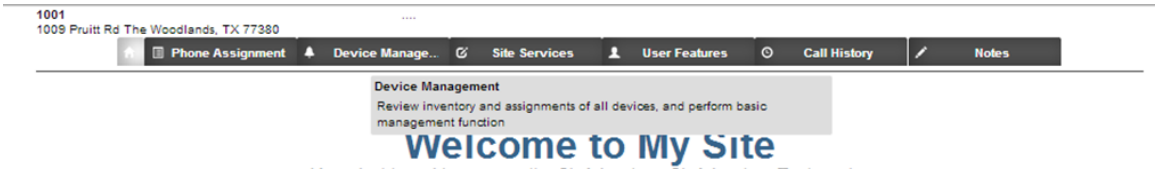
My Site Dashboard Overview

The My Site dashboard provides the BroadCloud PBX customer Administrator a portal for managing users, features, and devices for a specific site. This tool also provides a reporting mechanism for call history, as well as a notes facility.

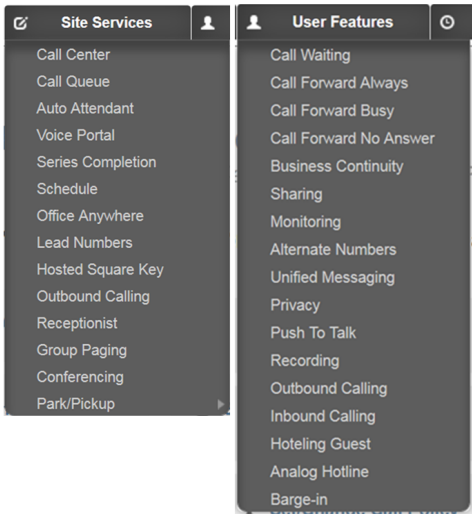
General Use Tips

Common elements throughout the My Site layout:

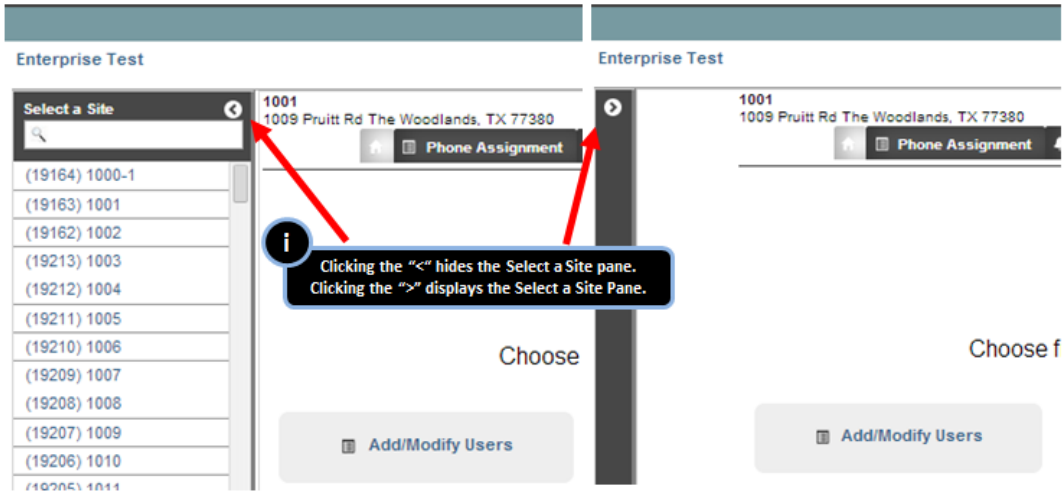
- ***Menu Tabs with icon and hover-over text***.



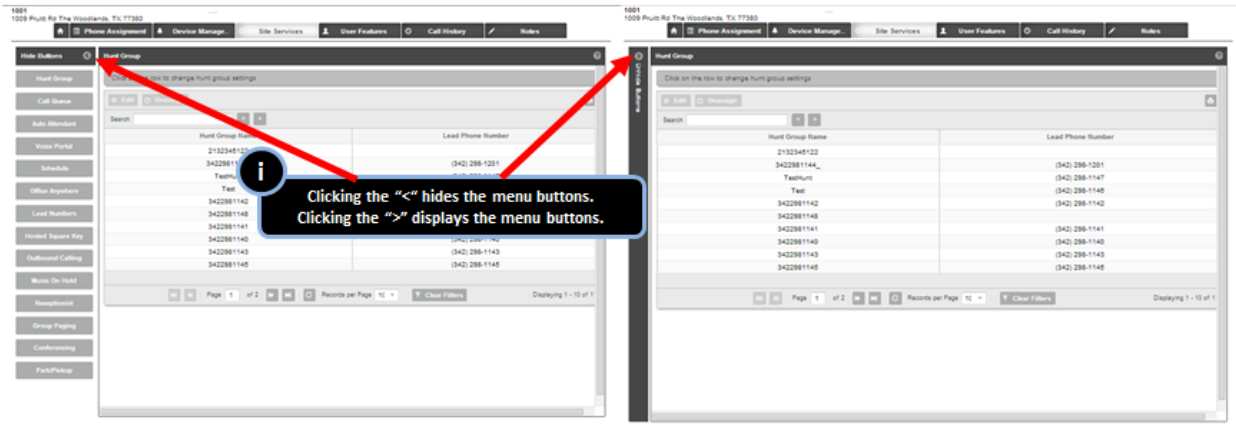
- ***Drop Down Menus***. For the Site Services and User Features, quickly navigate to the specific feature you are managing.



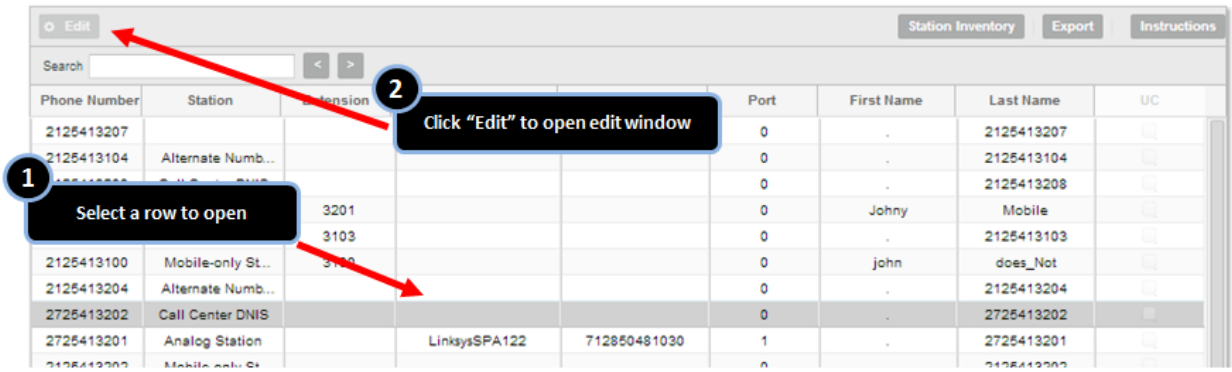
- ***Collapsible Site List***. Hide or display the site selection list.



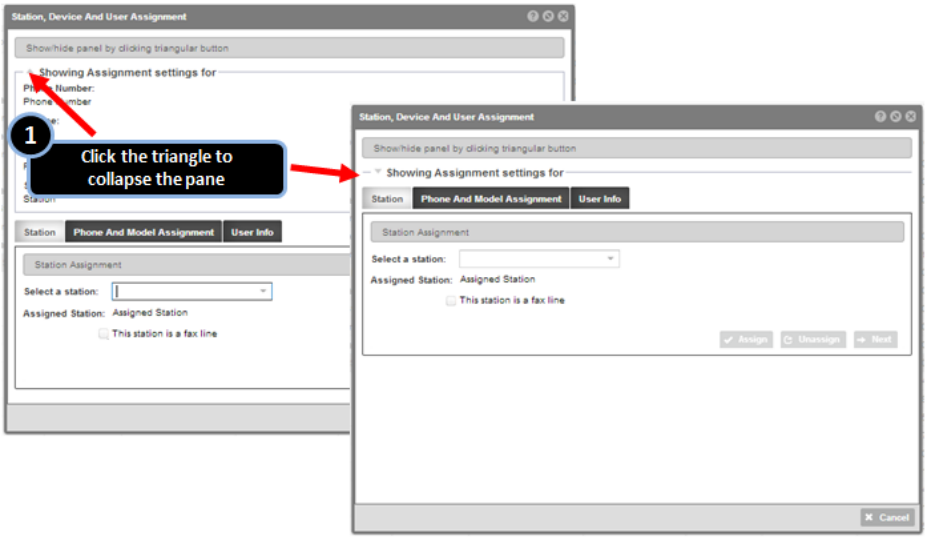
- ***Collapsible Left-hand menu.*** For tabs with menu buttons on the left side of the panel, hide or display these selections as needed.



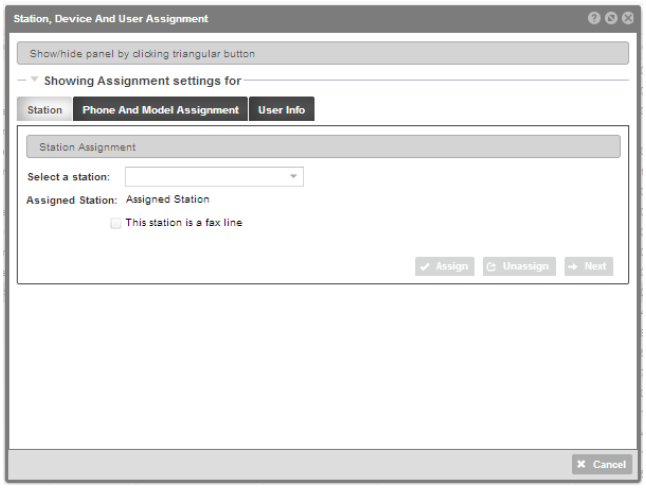
- ***Consistent method of opening line items for editing.*** When presented with multiple line items, users select the row for that item, then click the edit button



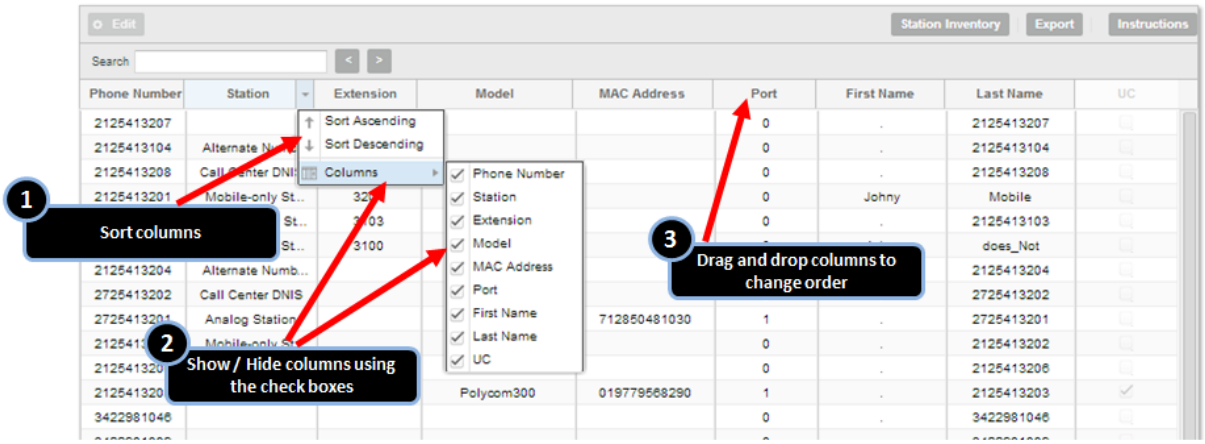
- ***Collapsible editing panes***. Conserve screen space by hiding the editing pane.



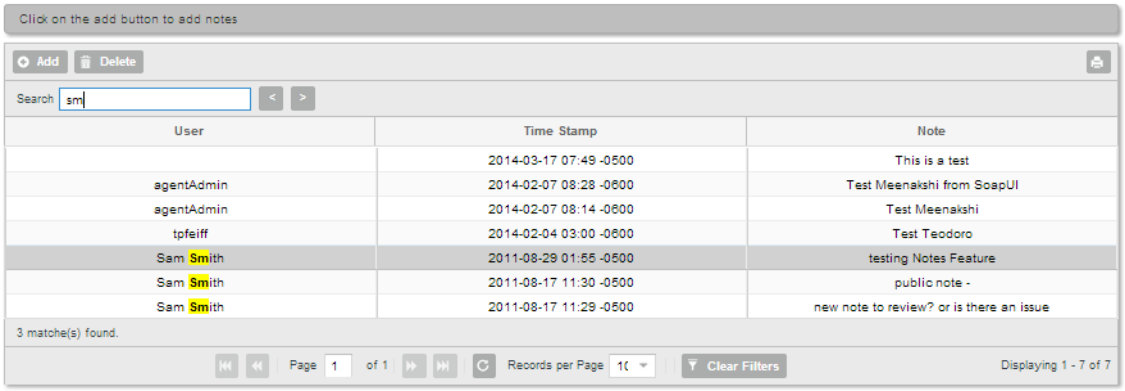
- ***Tabbed panes in editing windows***. Clearly labeled and usable means of selecting different panes within editing screens.



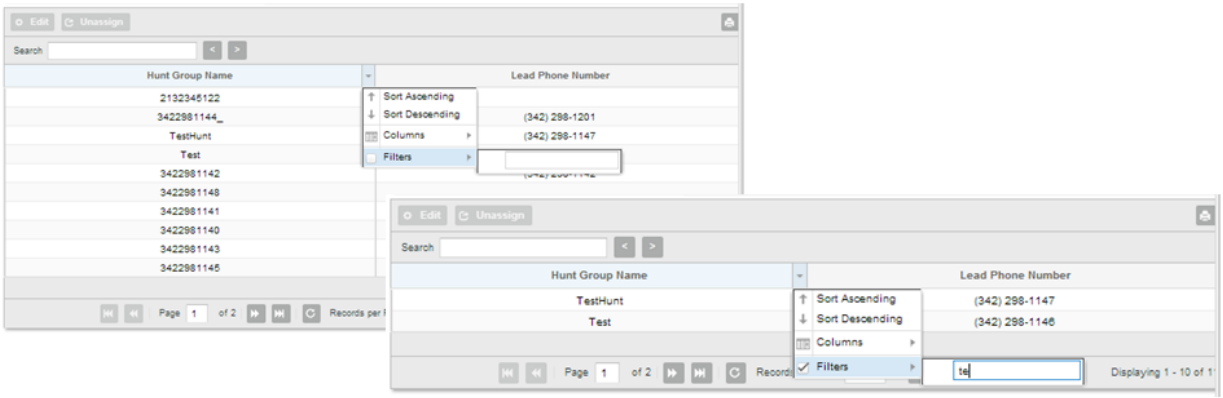
- ***Customize Table View***. Sort, show/hide, or rearrange order of columns in a table.



- ***Search Table.***

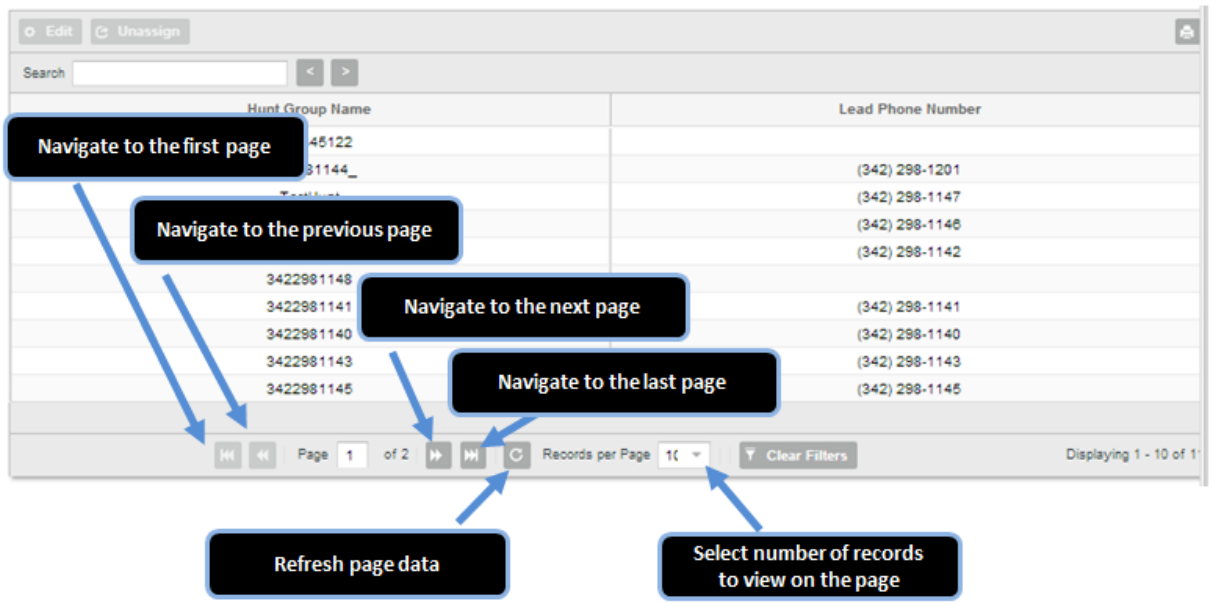


- ***Filter Columns.*** Filter contents of the column. Uses fuzzy logic to find the text search string anywhere within the table. Clear filters resets the view.



- ***On-screen Help.*** Find help with the feature/function you are performing by clicking the button.

- ***Manage Table Size, Page Viewed, and Refresh Data.*** Select number of records to view, navigate page number, and refresh table data.

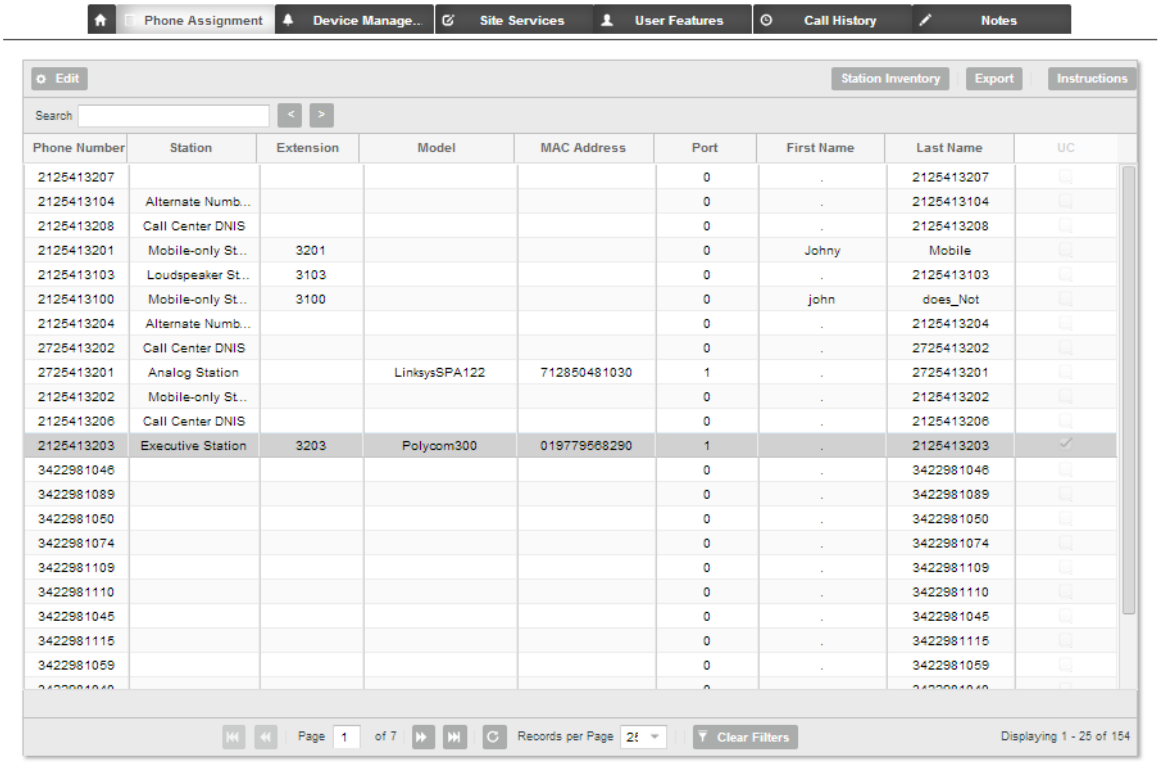


Overview of Menu Tabs

1. **Home**

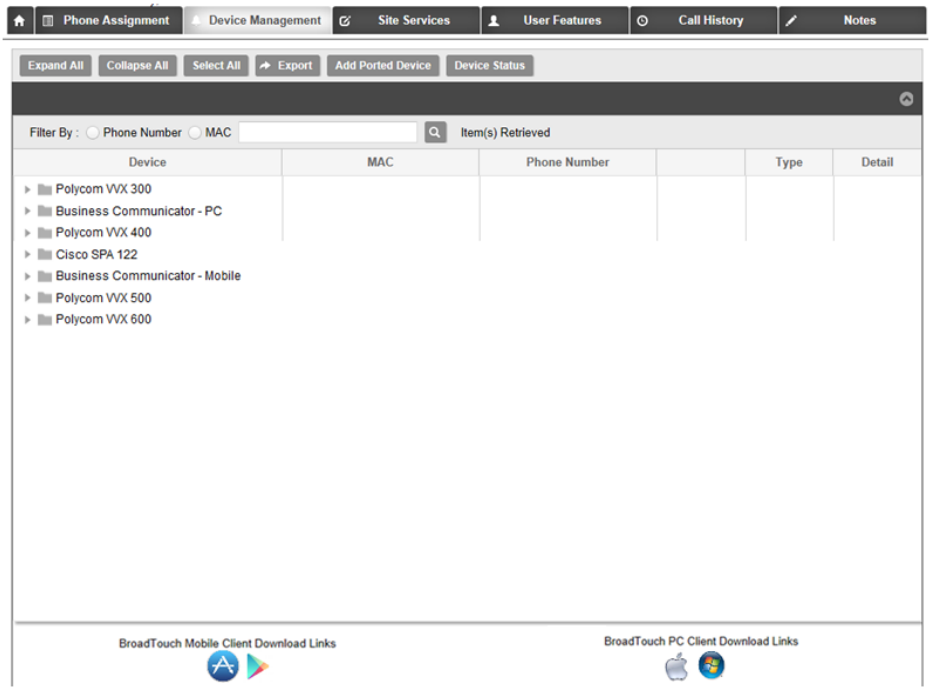
- Quick links to common tasks

2. **Phone Assignment**
   Create users and assign them telephone numbers, stations, and phones. Manage user profiles, extension, and reset passwords. Bulk site assignment functions are available.



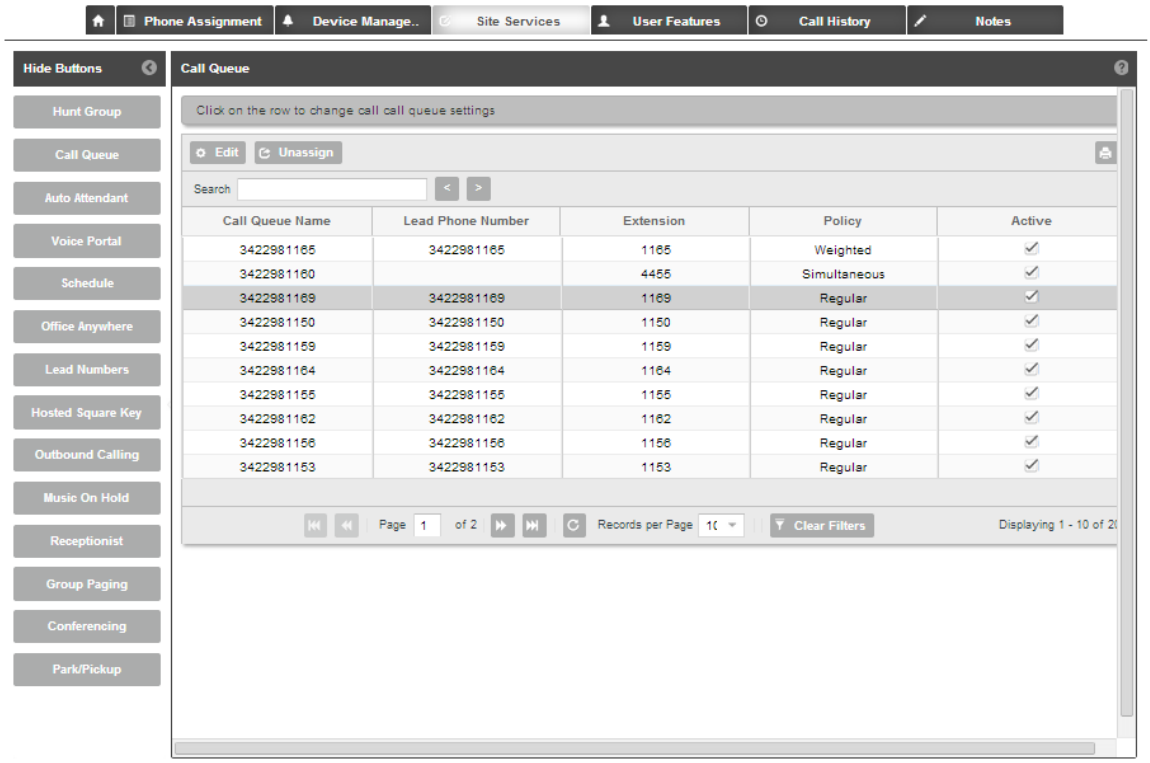
3. Device Management

View list of phones and clients assigned to the site. Manage and view status of phones.



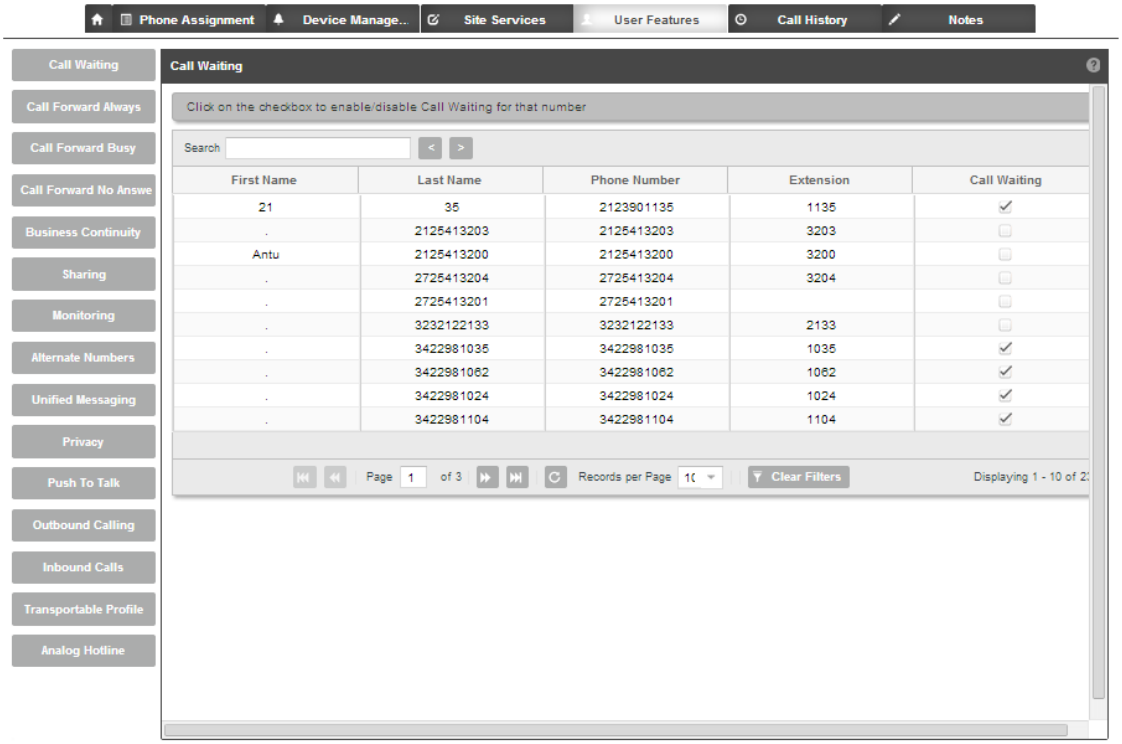
4. Site Services

Configure and manage services, features, and calling plans available to the site.



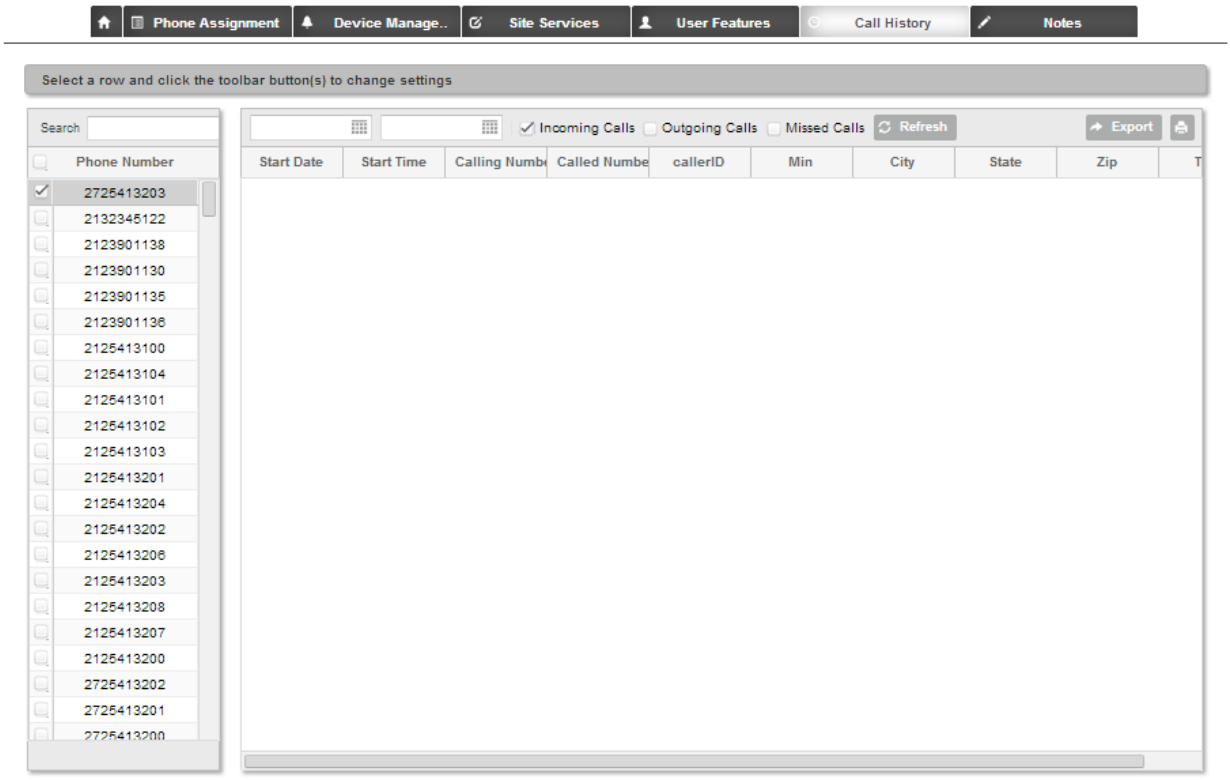
5. User Features

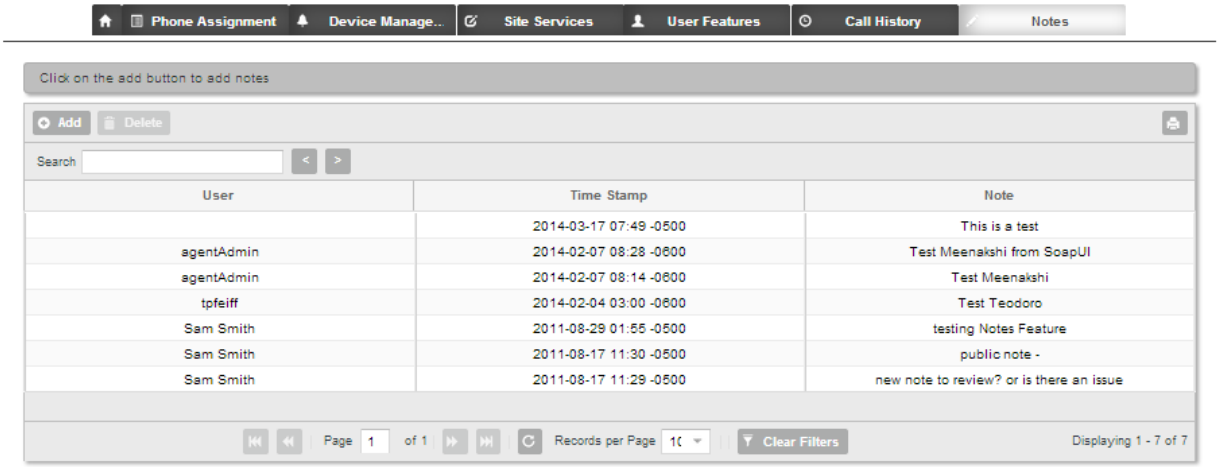
Edit features and calling plans for specific users on the site.



6. Call History

View call history data for users and numbers on the site. Call history can be exported for analysis and use apart from the dashboard.



7. Notes

Add and edit notes for administrators on the site.