

BRUIN Cloud PBX

USER GUIDE



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USING THE BRUIN WALKME GUIDES

Using the Bruin WalkMe Guides

WalkMe is a service that will walk you through the steps in Bruin required to perform a specified action.



Select the question mark button to the left of the bruin symbol above. Then Select 'Cloud PBX' to see the WalkMe options.

LOCATE EXISTING CLOUD PBX GROUP AND USERS

Locate existing Cloud PBX Group and Users

1. SELECT CLIENT



2. FROM SIDEPANE, SELECT INVENTORY



Inventory By Organization

82560 Bruin Group, LLC. apowers@mettel.net 40

Show Map No + Filter Refresh Download Print

Filtered X Status equals Active Clear all filters Custom Filter

		STATUS	SERVICE	ADDRESS	DESCRIPTION	ACCOUNT	ORGANIZATION	TICKETS	
▶	<input type="checkbox"/>	🔄	22075	55 Water St Fl 32 New York, NY	Cloud PBX Group Cloud PBX Group	MetTel	Cloud PBX	+20	⋮
▶	<input type="checkbox"/>	🔄	22075-0001@as.metc...	55 Water St Fl 32 New York, NY	Cloud PBX - Main Line Cloud PBX - Main Line	MetTel	Cloud PBX	NA	⋮
▶	<input type="checkbox"/>	🔄	AA-22075-0001@as.me...	55 Water St Fl 32 New York, NY	Cloud PBX Auto Attendant Cloud PBX Main Line Auto Attendant - Sing...	MetTel	Cloud PBX	NA	⋮
▶	<input type="checkbox"/>	🔄	HG-22075-0001@as.m...	55 Water St Fl 32 New York, NY	Cloud PBX Cloud PBX Main Line Hunt Group	MetTel	Cloud PBX	NA	⋮
▶	<input type="checkbox"/>	🔄	VP-22075-0001@as.me...	55 Water St Fl 32 New York, NY	Cloud PBX Voicemail Portal Cloud PBX Main Line Voicemail Portal	MetTel	Cloud PBX	NA	⋮

3. SELECT LOCATION

This will allow you to view the Cloud PBX Group at various different locations.

Bruin HQ
55 Water St Fl 32
New York, NY 10041-3299

Today ☀️ 39.6° ||||| +5

Cloud PBX No location notes ⋮

ALL Active Cloud Services + ↓

All Lines Filter this by Line...

	STATUS	SERVICE	DESCRIPTION	TICKETS	ACCOUNT	INSTALLED	COST CENTER		
▶	<input type="checkbox"/>	🔄	22075	Cloud PBX Group Cloud PBX Group	+20	MetTel	Feb 2, 2018	Cloud PBX	⋮

LOCATE EXISTING CLOUD PBX GROUP AND USERS

4. SELECT DROPDOWN ARROW TO VIEW USERS

Find the Description that reads 'Cloud PBX Group' and click the dropdown arrow to the left of the 'Status' column.

The screenshot shows the Bruin HQ interface. At the top, there's a header with location information (Bruin HQ, 55 Water St Fl 32, New York NY 10041-3299), weather (39.6°), and a 'Cloud PBX' label. Below the header, there are tabs for 'ALL', 'Active', and 'Cloud Services'. A search bar is present with the text 'Filter this by Line...'. The main content area shows a table of Cloud PBX Groups. The first row is selected, and its details are expanded. The expanded view shows a table of users for the '22075' group.

STATUS	SERVICE	DESCRIPTION	MAIN NUMBER/EXT	TICKETS	ACCOUNT	INSTALLED	COST CENTER
<input type="checkbox"/>		22075-0001@as.metconnect.com Cloud PBX - Main Line Cloud PBX - Main Line	(914) 303-6575 1000	NA	MetTel	Feb 2, 2018	Cloud PBX
<input type="checkbox"/>		22075-0002@as.metconnect.com Jimmy Salame Cloud PBX - Silver Cloud PBX - Silver	(914) 556-3010 1234	NA	MetTel	Feb 20, 2018	Cloud PBX
<input type="checkbox"/>		22075-0003@as.metconnect.com Cloud PBX - Silver Cloud PBX - Silver	(631) 649-1580 1002	NA	MetTel	Feb 27, 2018	Cloud PBX
<input type="checkbox"/>		22075-0004@as.metconnect.com James Hicks Cloud PBX - Platinum Cloud PBX - Platinum	2001	1	MetTel	Feb 27, 2018	Cloud PBX
<input type="checkbox"/>		22075-0005@as.metconnect.com James Hicks Cloud PBX - Silver Cloud PBX - Silver	1020	1	MetTel	Mar 13, 2018	Cloud PBX
<input type="checkbox"/>		22075-0006@as.metconnect.com James Hicks Cloud PBX - Silver Cloud PBX - Silver	1001	NA	MetTel	Mar 13, 2018	Cloud PBX

5. SELECT SERVICE HYPERLINKS TO VIEW USERS

The screenshot shows the Bruin Line Management interface. The user 'James Hicks' is selected, and his details are displayed. The interface includes a navigation menu, a search bar, and a header with the Bruin logo and 'Line Management' text. The user's contact information and service details are shown, along with a list of service links.

James Hicks
Email: jhicks@bruin.com Phone: 2123595059

22075-0004@as.metconnect.com Cloud PBX - Platinum Cloud PBX - Platinum

Details Plans and features Call history Bill Information Change log

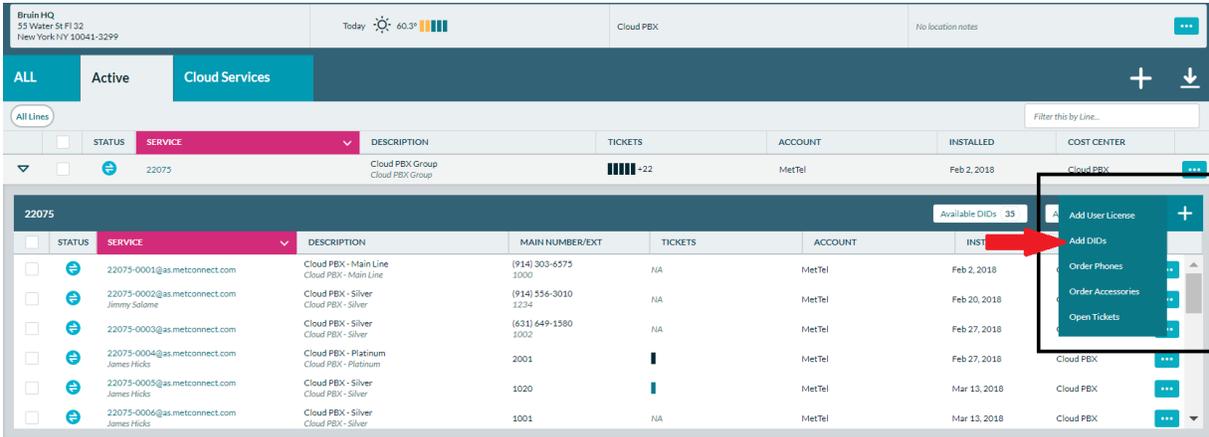
User Name: 22075-0004@as.metconnect.com
First Name: Mark Edit
Last Name: Marshall Edit
Email: NA
Extension: 2001 Edit
Main TN: NA Edit
MAC Address: NA Edit
Service Address: NA

Upgrade New Ticket Reset Voicemail Password

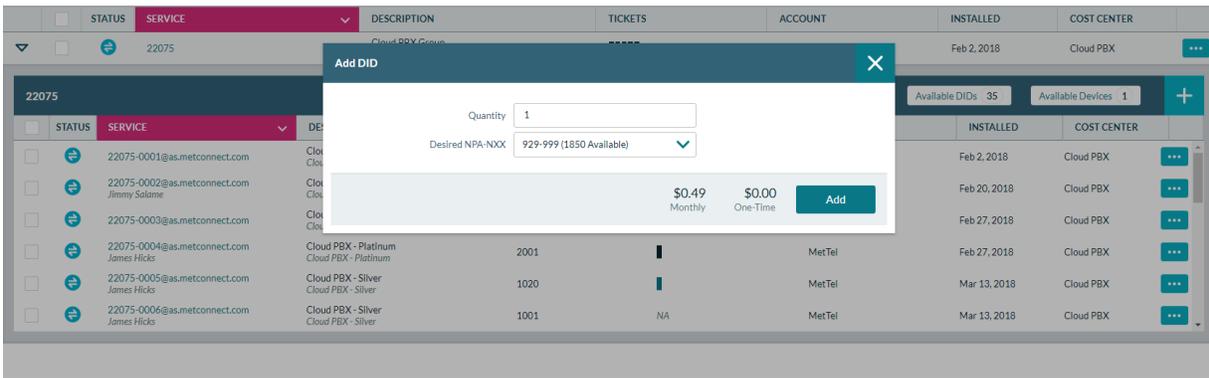
ADD DIDS TO CLOUD PBX GROUP

Add DIDs to Cloud PBX Group

From the Cloud PBX Group view (Location view) after you select the dropdown arrow, there is a + sign at the far right. Scroll over the + sign and a dropdown will appear. From this dropdown select “Add DIDs”.



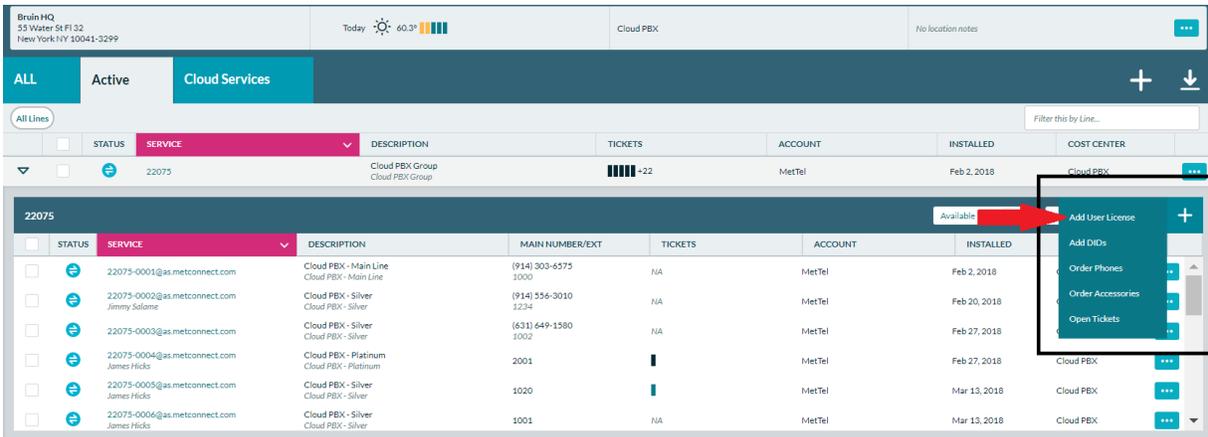
Once the “Add DIDs” option is selected, a form will appear where you can select the quantity of DIDs and view/select from available DID’s.



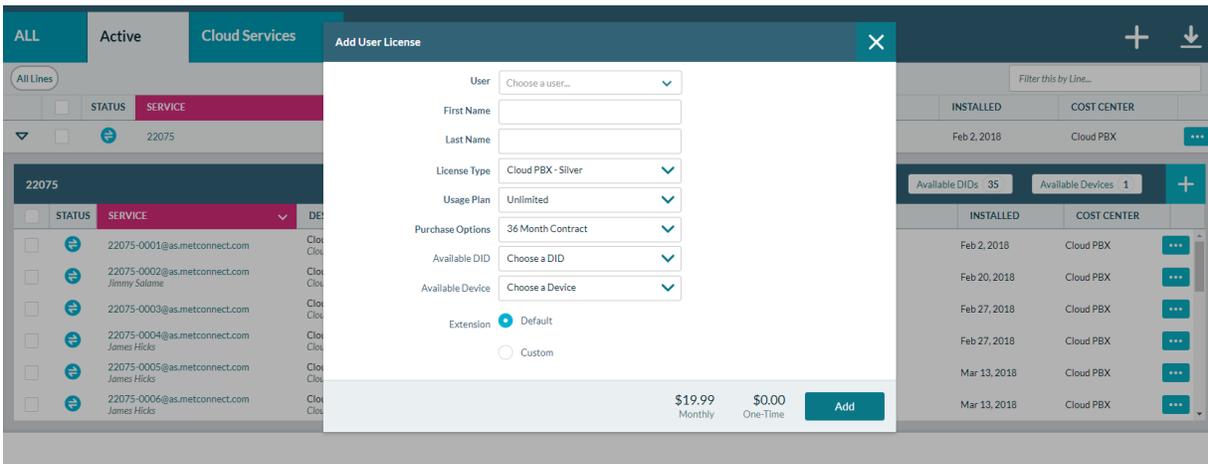
CREATE NEW CLOUD PBX USER

Create new Cloud PBX User

From the Cloud PBX Group view (Location view) after you select the dropdown arrow, there is a + sign at the far right. Scroll over the + sign and a dropdown will appear. From this dropdown select “Add User License”.



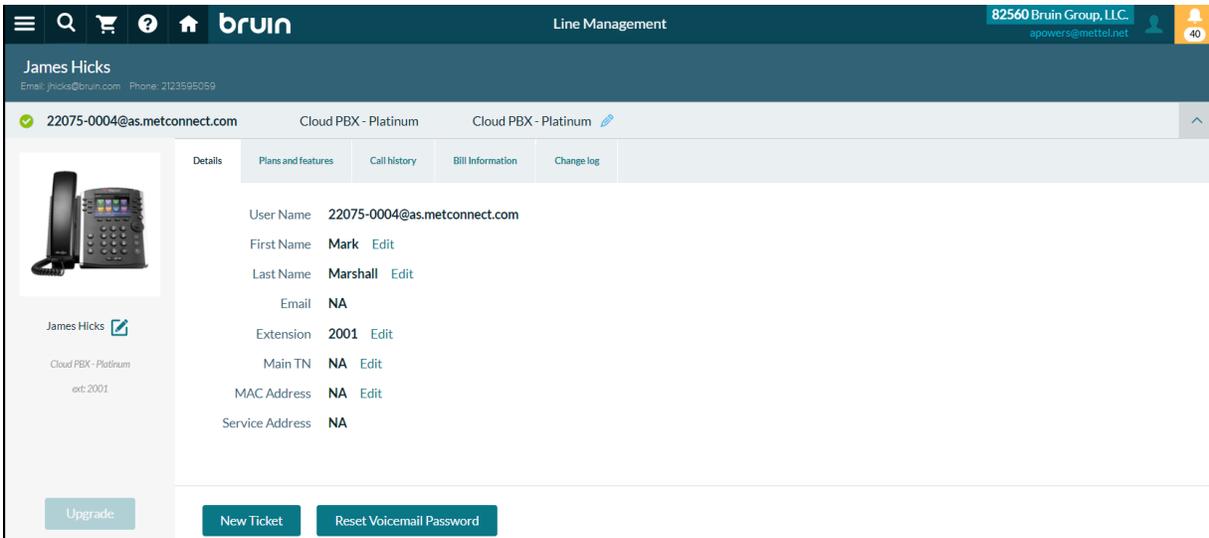
Once the “Add User License” option is selected a form will appear which allows you to select the user, adjust first and last name, choose the license type, usage plan, purchase option, available DID, and available devices in your group. You can also customize the users extension in this screen.



MODIFY CLOUD PBX USER DETAILS

Modify Cloud PBX User Details

From the Cloud PBX User view, there are 8 different fields in the Cloud PBX User Details tab. 5 of these can be modified, below. In order to edit these fields select the 'Edit' hyperlink to the right of the value. In addition, you are able to create new tickets and Reset the Voicemail Password from this tab.



The screenshot displays the Bruin Line Management interface. At the top, there is a navigation bar with the Bruin logo, 'Line Management' text, and user information for '82560 Bruin Group, LLC.' with the email 'apowers@mettel.net' and a notification icon showing '40'. Below the navigation bar, the user profile for 'James Hicks' is shown, including his email 'jhicks@bruin.com' and phone number '2123595059'. The main content area is titled '22075-0004@as.metconnect.com' and shows the user is on a 'Cloud PBX - Platinum' plan. A tabbed interface is visible with 'Details' selected. The 'Details' tab shows the following fields: User Name (22075-0004@as.metconnect.com), First Name (Mark Edit), Last Name (Marshall Edit), Email (NA), Extension (2001 Edit), Main TN (NA Edit), MAC Address (NA Edit), and Service Address (NA). At the bottom of the details section, there are three buttons: 'Upgrade', 'New Ticket', and 'Reset Voicemail Password'.

5 FIELDS YOU CAN MODIFY

1. **First name**
2. **Last Name**
3. **Extension**
4. **Main TN**
5. **MAC Address**

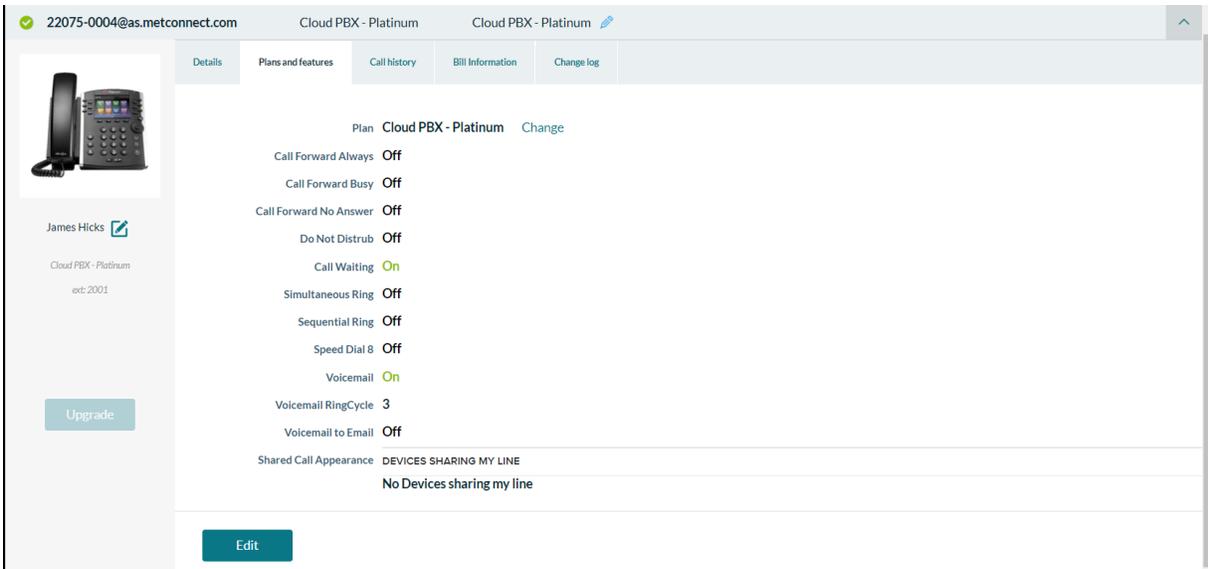
CREATE NEW TICKET

RESET VOICEMAIL PASSWORD

MODIFY CLOUD PBX USER PLAN AND FEATURES

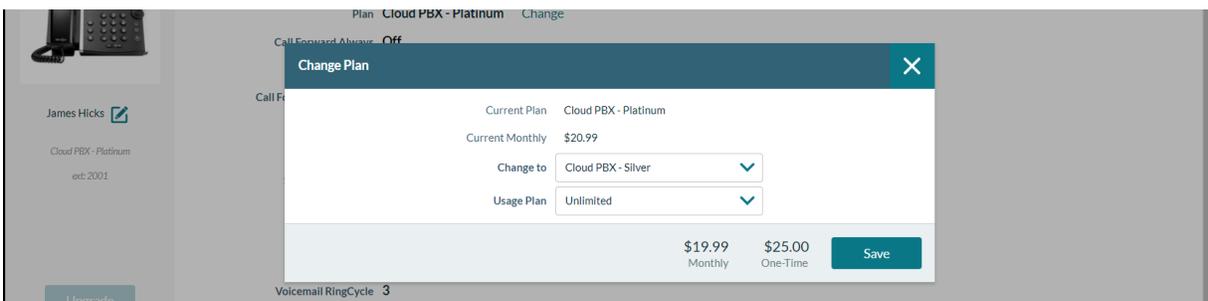
Modify Cloud PBX User Plan and Features

To modify Cloud PBX User Plans or Features Select the 'Plans and Features' tab from the Cloud PBX User screen.



CHANGE CLOUD PBX USER PLAN (LICENSE)

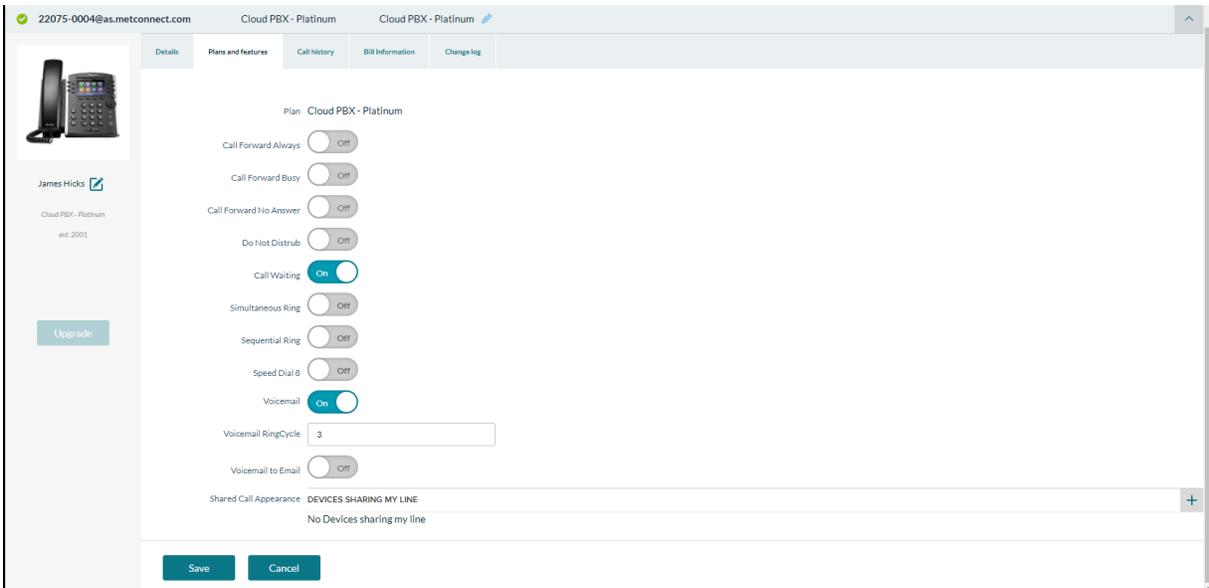
Select the 'Change' hyperlink to the right of the Plan. A pop out screen will appear which allows you to change the plan and usage details. Changing this plan will apply the new cost and plan details to this user in pre-bill. It will also apply a \$25 one-time fee for making the change.



MODIFY CLOUD PBX USER FEATURES

In order to modify features on a Cloud PBX User License, select the 'Edit' button at the bottom of the Cloud PBX User screen.

MODIFY CLOUD PBX USER PLAN AND FEATURES



In this screen you are able to modify all the various features available to the User based on their Plan.

INSPECTING CALL HISTORY

Inspecting Call History

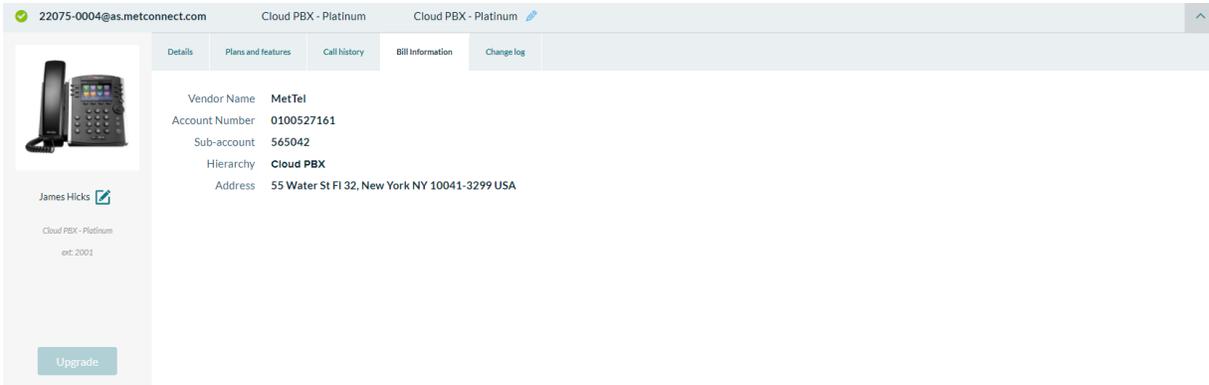
From the Cloud PBX User view, you are able to generate customized CSV reports showing call details, as well as simply view the last 20 calls.

The screenshot displays the user interface for inspecting call history. At the top, the user's email address is 22075-0004@as.metconnect.com, and the service is identified as Cloud PBX - Platinum. The interface includes a navigation menu with tabs for Details, Plans and features, Call history (selected), Bill information, and Change log. On the left, a profile card for James Hicks, a Cloud PBX - Platinum user with extension 2001, includes an 'Upgrade' button. The main area is titled 'Query Call Details' and 'Last 20 Calls'. It features a 'Filter by' section with 'From Date' and 'To Date' input fields, a 'Sort Order' section with radio buttons for 'Descending (Z-A)' (selected) and 'Ascending (A-Z)', and a 'Search' section with a 'Search by number' input field. A 'CSV' button is located at the bottom of the interface.

INSPECTING BILL INFORMATION

Inspecting Bill Information

From the Cloud PBX User view, you are able to view the users billing information. This includes Vendor Name, Account Number, Sub-account number, hierarchy, and address.



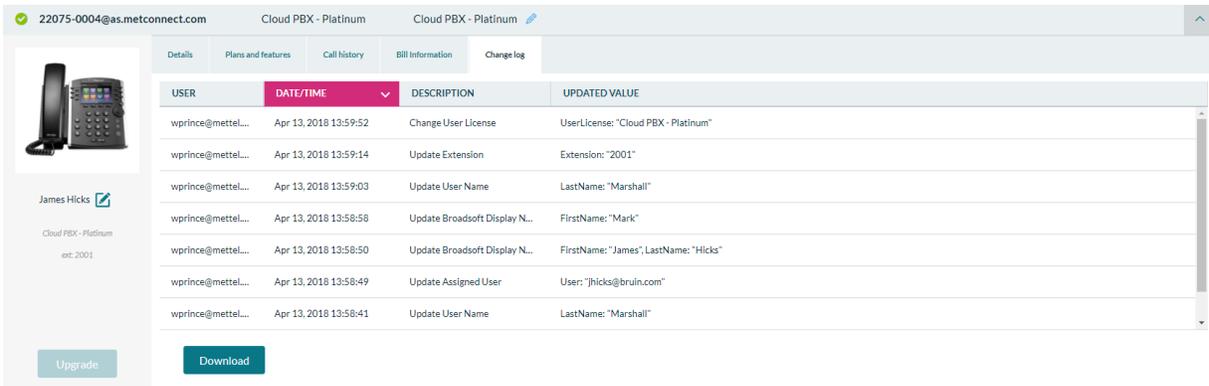
The screenshot shows a user interface for inspecting bill information. At the top, there is a header with the email address 22075-0004@as.metconnect.com and two instances of 'Cloud PBX - Platinum'. Below the header is a navigation bar with tabs for 'Details', 'Plans and features', 'Call history', 'Bill Information', and 'Change log'. The 'Bill Information' tab is active. On the left side, there is a profile card for 'James Hicks' with a phone icon, a checkmark, and the text 'Cloud PBX - Platinum ext. 2001'. Below the profile card is an 'Upgrade' button. The main content area displays the following billing information:

Vendor Name	MetTel
Account Number	0100527161
Sub-account	565042
Hierarchy	Cloud PBX
Address	55 Water St Fl 32, New York NY 10041-3299 USA

INSPECTING CHANGE LOG

Inspecting Change Log

From the Cloud PBX User view, you are able to view all non-ticket creating changes made to the Cloud PBX User. This includes all changes to the Plans and Features, and other changes such as Extensions or First and Last Name. You can also download a version of this report in excel.



22075-0004@as.metconnect.com Cloud PBX - Platinum Cloud PBX - Platinum

Details Plans and features Call history Bill Information Change log

James Hicks
Cloud PBX - Platinum
est. 2001

Upgrade Download

USER	DATE/TIME	DESCRIPTION	UPDATED VALUE
wprince@mettel...	Apr 13, 2018 13:59:52	Change User License	UserLicense: "Cloud PBX - Platinum"
wprince@mettel...	Apr 13, 2018 13:59:14	Update Extension	Extension: "2001"
wprince@mettel...	Apr 13, 2018 13:59:03	Update User Name	LastName: "Marshall"
wprince@mettel...	Apr 13, 2018 13:58:58	Update Broadsoft Display N...	FirstName: "Mark"
wprince@mettel...	Apr 13, 2018 13:58:50	Update Broadsoft Display N...	FirstName: "James", LastName: "Hicks"
wprince@mettel...	Apr 13, 2018 13:58:49	Update Assigned User	User: "jhicks@bruin.com"
wprince@mettel...	Apr 13, 2018 13:58:41	Update User Name	LastName: "Marshall"