BRUIN Cloud PBX

USER GUIDE

MetTel®

TABLE OF CONTENTS

Contents

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**

3. **SELECT LOCATION**

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

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.

5. SELECT SERVICE HYPERLINKS TO VIEW USERS

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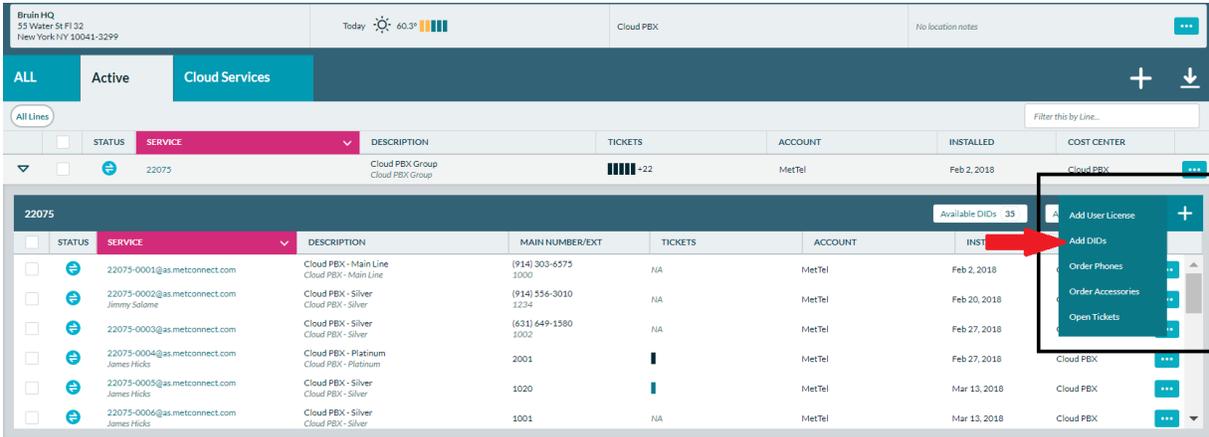
Once the "Add DIDs" option is selected, a form will appear where you can select the quantity of DIDs and view/select from available DID's.

Create new Cloud PBX User

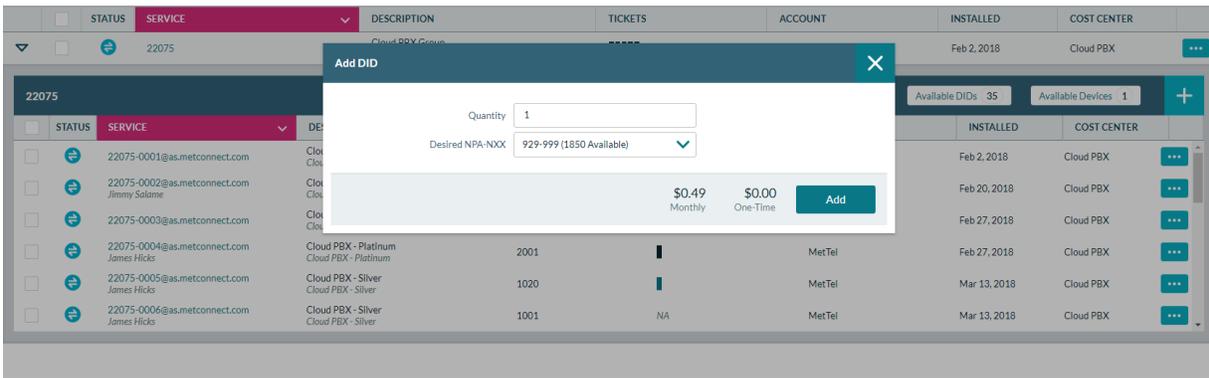From the Cloud PBX Group view (Location view) after you select the dropdown arrow, there is a + sign at the far right. Scroll over the + sign and a dropdown will appear. From this dropdown select "Add User License".
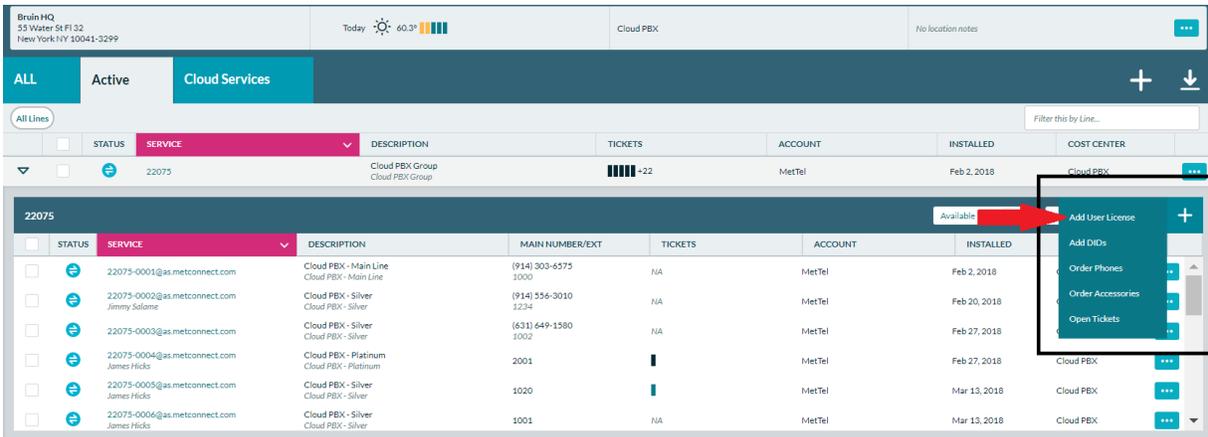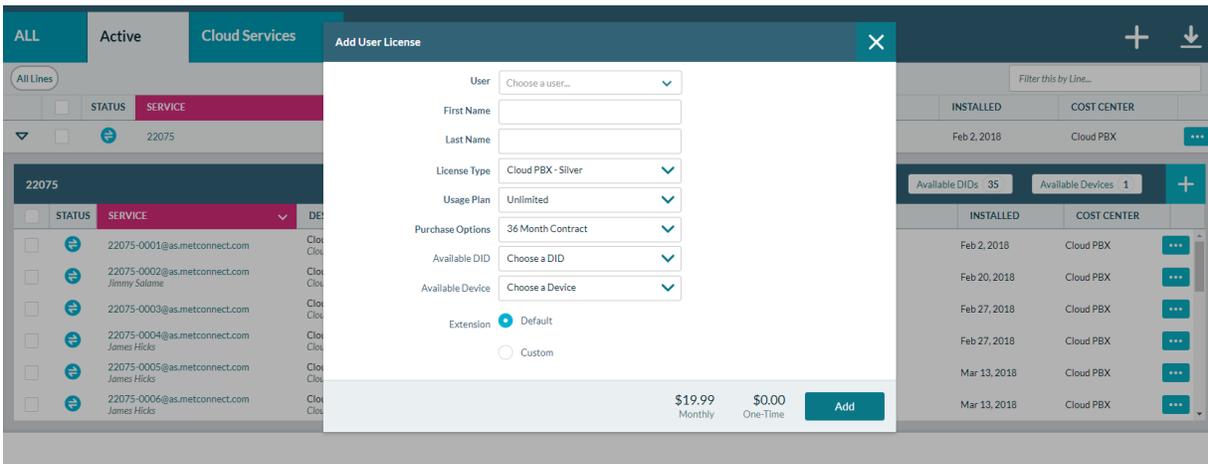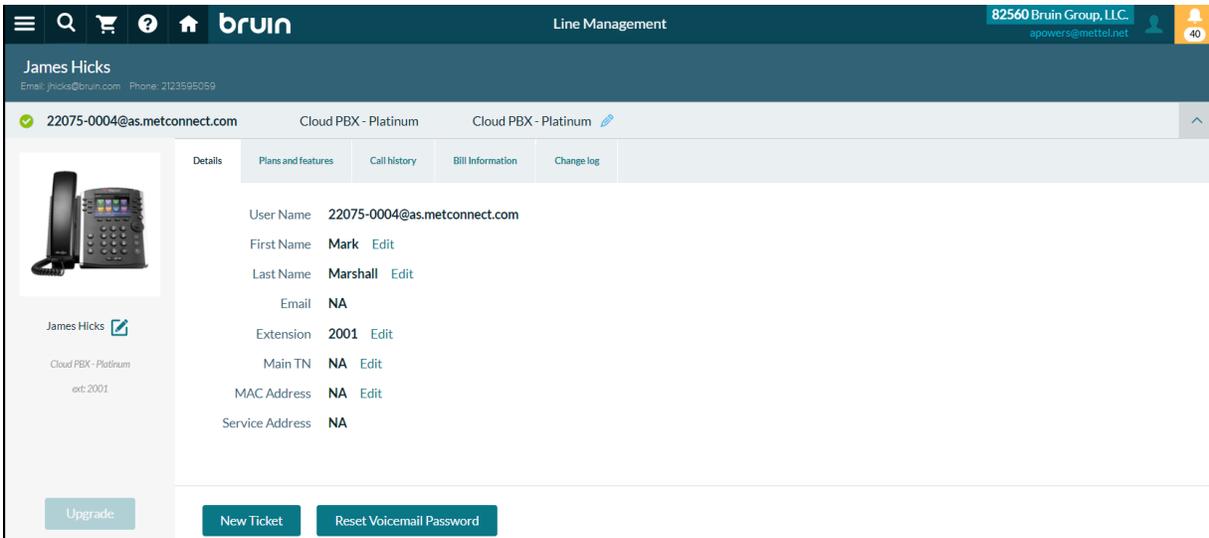

Once the "Add User License" option is selected a form will appear which allows you to select the user, adjust first and last name, choose the license type, usage plan, purchase option, available DID, and available devices in your group. You can also customize the users extension in this screen.

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.

5 FIELDS YOU CAN MODIFY

1. **First name**

2. **Last Name**

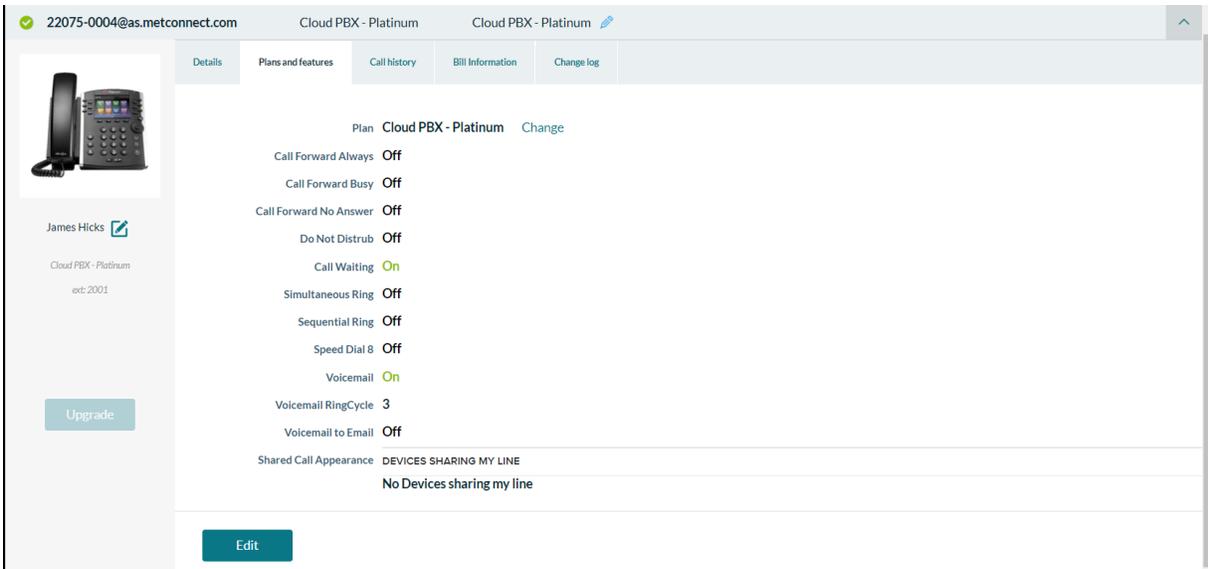3. **Extension**

4. **Main TN**

5. **MAC Address**

CREATE NEW TICKET

RESET VOICEMAIL PASSWORD
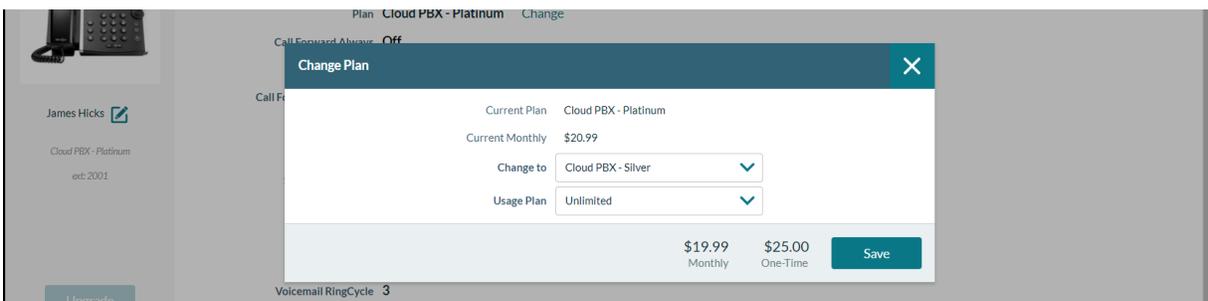
MODIFY CLOUD PBX USER PLAN AND FEATURES

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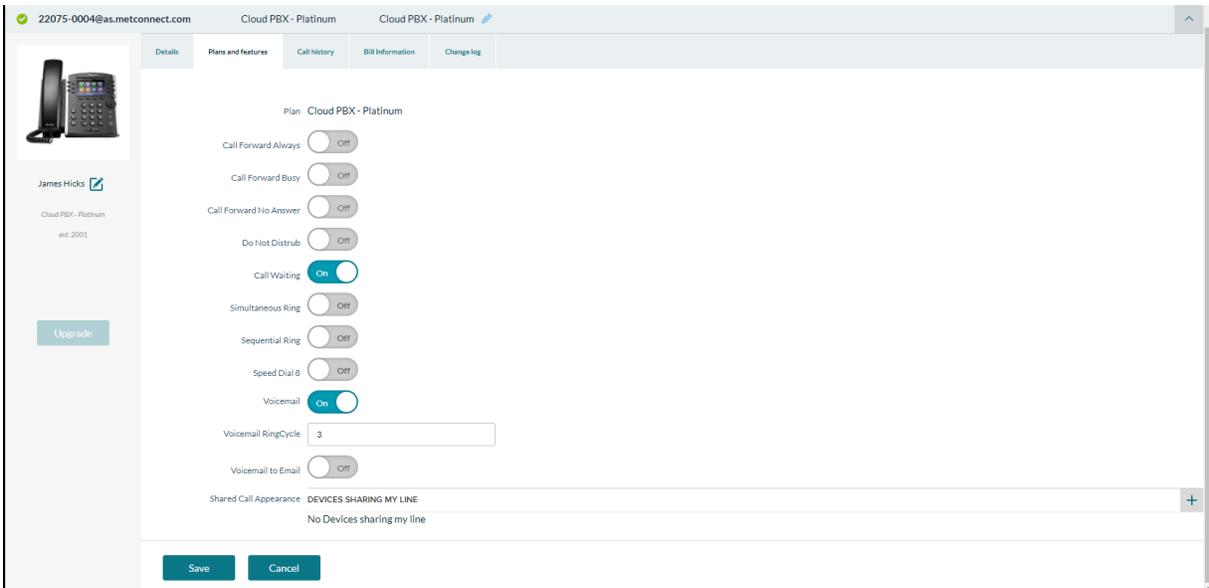
In this screen you are able to modify all the various features available to the User based on their Plan.
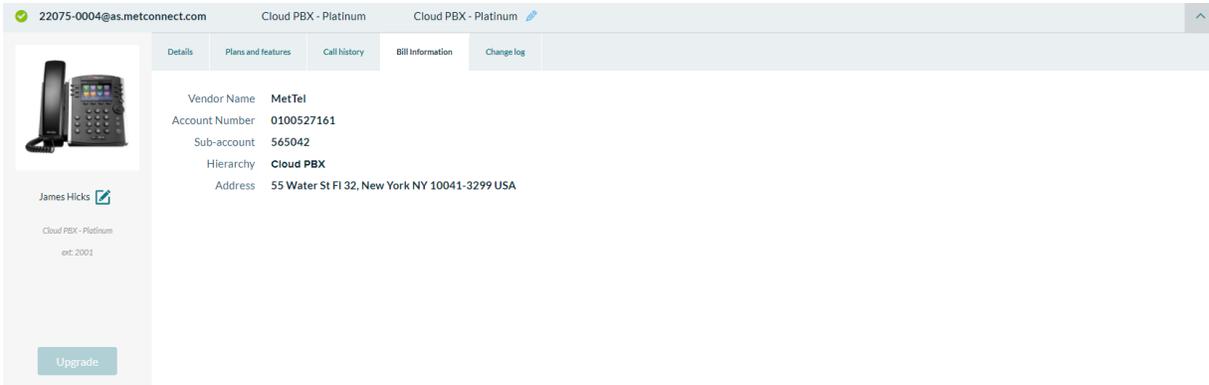
Inspecting Call History

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.

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.
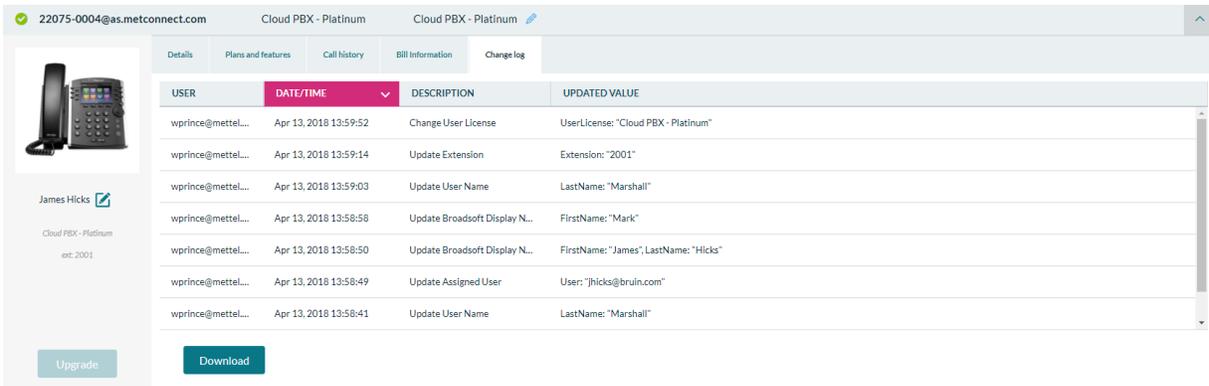
Inspecting Change Log

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.