The Goal of this Guide

The goal of this Administrator Bruin Guide is to help get you familiar with the different pages that Bruin has to offer so you can manage your company's Bruin account.

Getting Started with Bruin

Bruin helps you transition your telecommunication, data and wireless services when business needs change. Bruin is more than just your average TEM (telecom expense management), Bruin helps simplify your complex telecom expenses into a transparent platform, so you can see where your business' money is going.

Sign into your Bruin account at **app.bruin.com** and use the login information that was provided in your welcome email.

Created by the Bruin Success Team in 2019.

Updated by Bruin Client Outreach in 2020.

Contents

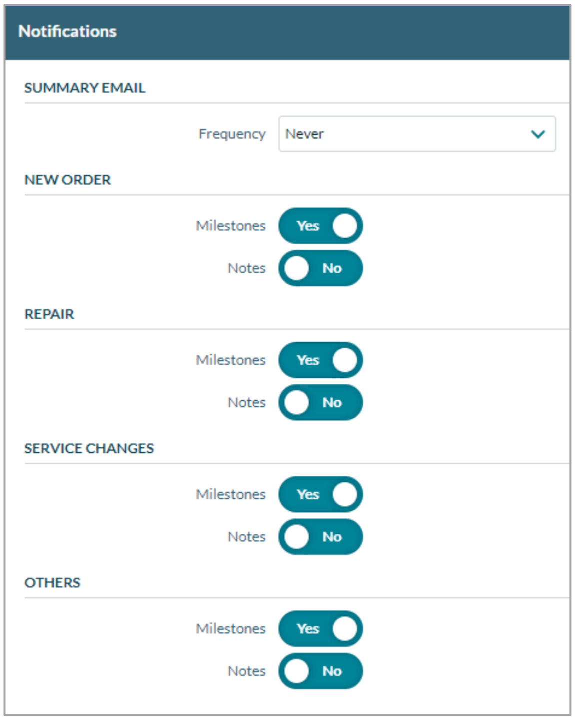
Once you log into your Bruin account, hover over the person icon in the upper right-hand corner. You will see options to open your profile settings, see your inventory, change your password, or logout. **Click on My Profile & Preferences** and continue to the next section.

Profile settings

1. On the left, you will see four categories: Profile, Inventory, Notifications, Preferences.
    a. Under the Profile section, you can edit your contact information.
    b. Under the Inventory section you will see any inventory assigned to you.
    c. Under the Notifications section you can change the frequency of email notifications and what kinds of email notifications you receive for the specific Tickets you have open at your company.

       The frequency can be Never, Hourly, Daily, or Weekly. Milestone notifications are any changes in the status of your Tickets. Notes are any notation that has been added to your Ticket. These settings can be toggled between Yes and No.

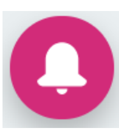
       There is an option for Advanced Options, if you click on this icon in the top right corner of the Notifications tab.



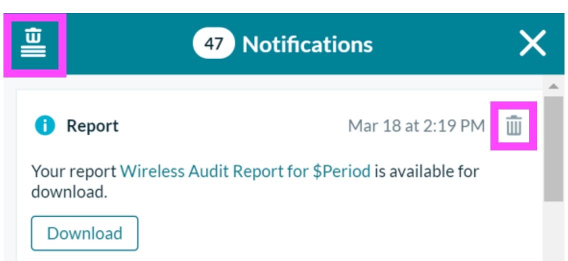
d. Under the Preferences section you can change the line item view within Bruin.

Note: If you make any changes, make sure to click Save in the bottom right corner of each tab in the Profile & Preferences page.

Notifications: The Push Notifications button shows you **notifications for tickets and reports** at the bottom right of the page.



You can Dismiss the notifications individually (at the top right of the notification) or in bulk (top left)



➢ Next, we will go through the different navigation icons located at the top left of Bruin.

Navigation Icons

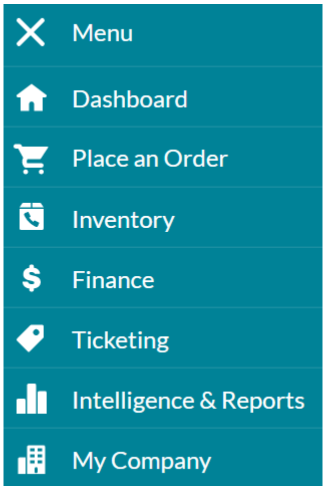
Super Search: The Super Search allows you to search for locations, tickets, users, invoices, and clients. You must type at least 3 characters for the search to begin its mission of finding what you need.

Shopping Cart: The Shopping cart allows you to order new inventory, equipment, and/or services to go along with it.

Home Button: The Home button, if clicked, will take you back to your dashboard/homepage. Feel free to click here if you ever feel lost!

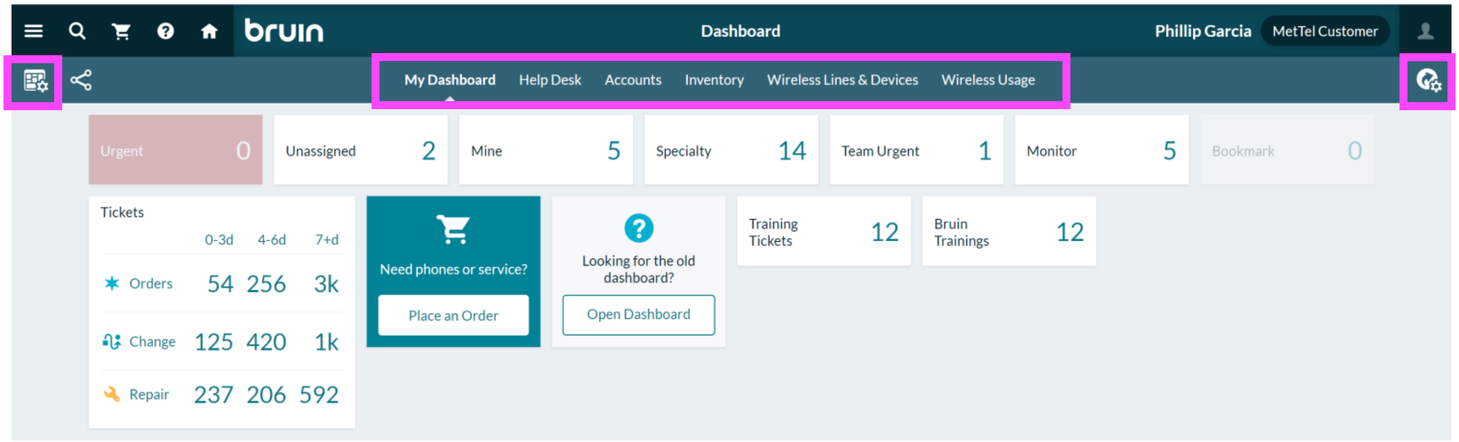
Help Button: The Help button has a comprehensive list of step-by-step tutorials. This will most likely be your first stop for any questions or inquiries on how to perform certain tasks. You can also suggest tasks you'd like to see in this Help button by clicking "Suggest a Topic".

Menu Button: Clicking on this "inedible" Hamburger Icon will allow you to see all the tools you can access within Bruin.



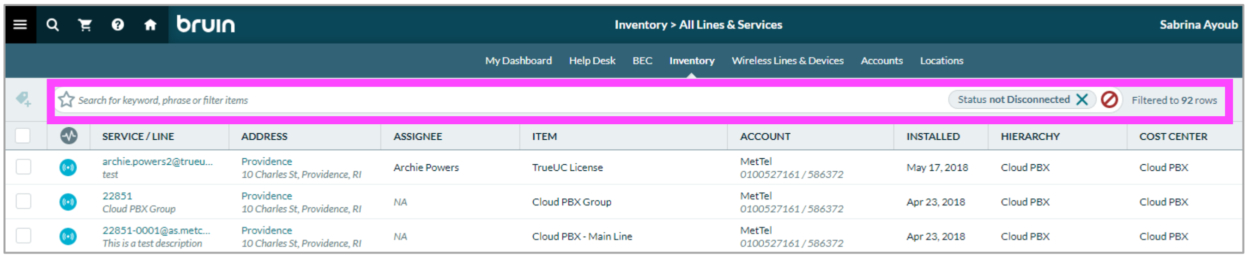
Dashboard: What will you find on the Dashboard?

- The Bruin Dashboard is a customizable widget board. You can create widgets on any favorite filters you have saved. You can create favorite filters on any page with a smart filter. You will also notice some shortcut links to certain Bruin pages. My **shortcut** links are highlighted in pink below. You can select the **arrow button** to the right to **edit your shortcuts**. You can select the **Configure Dashboard** button to the left to **edit your dashboard**.

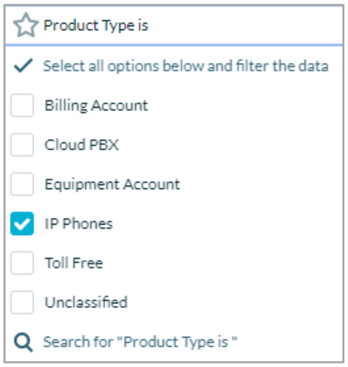


- What are **smart filters** and **favorite filters**?

This is a **smart filter.** The smart filter can be used to search for a keyword, phone #, phrase, or filter items. You may select filters or you can simply start typing in a phone number “7324448624”, a name “Sabrina”, vendor “MetTel”, address “55water”, and more.



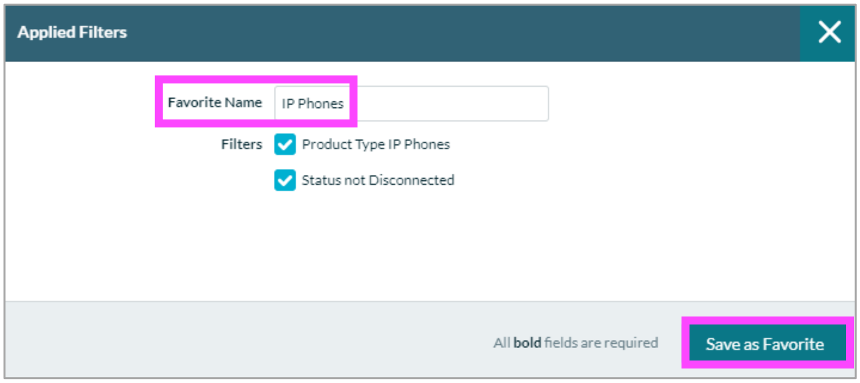
Click on it and a drop-down menu will appear and allow you to select certain criteria to filter on.



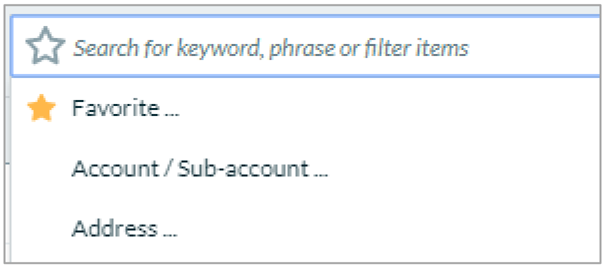
Then click the enter key. Notice how the smart filter altered what we see, and a new filter was added.

To **favorite** this filter combination, click on the **Star** icon

You can then name your **favorite filter** and save it.

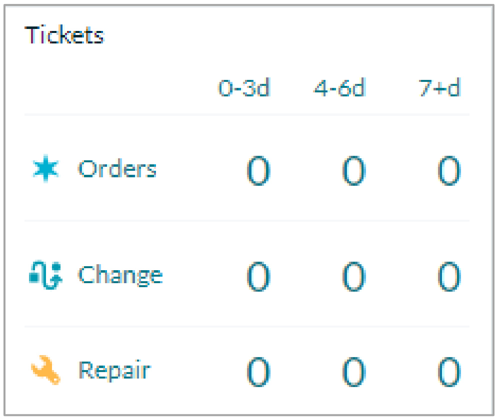


These **favorite filters** can be accessed in the **smart filter drop-down** by clicking on the word **Favorite**…



You can also **add these favorite filters to your dashboard.**

➢ The amount and types of **tickets that are currently active** for your company can be viewed from your dashboard.



Searching for phone numbers, inventory, users, locations, and tickets

The Super Search can be used to search for phone numbers, inventory, users, locations/addresses, account numbers, and ticket numbers.

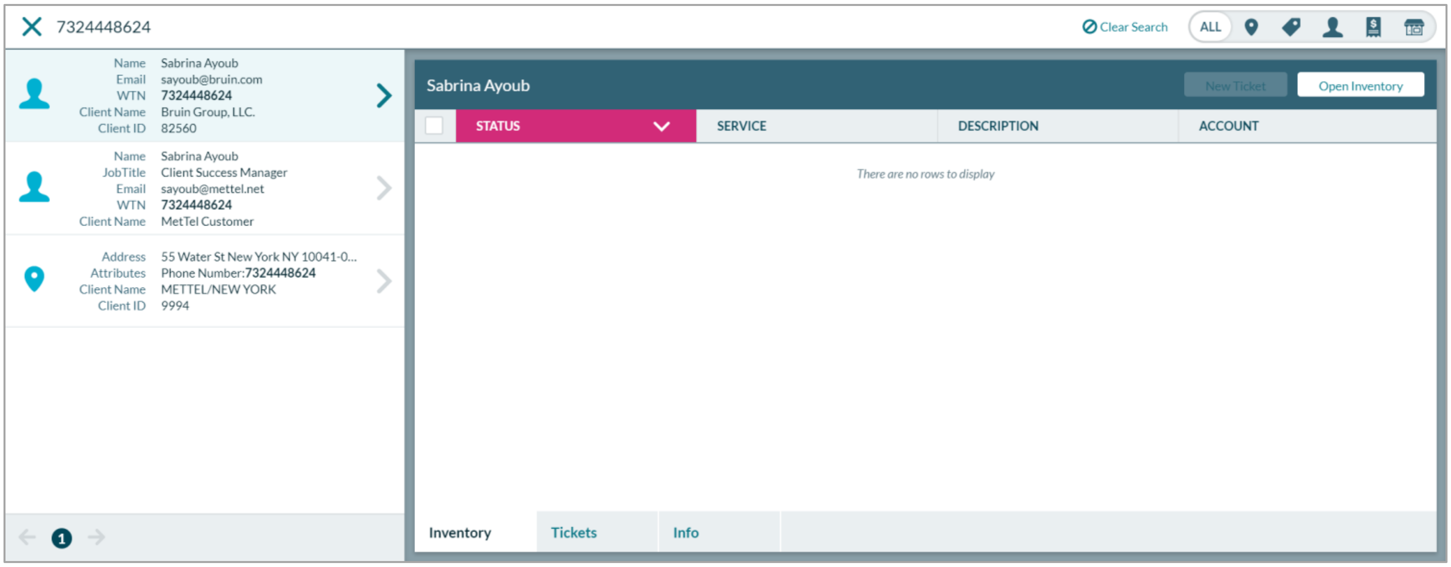
- To use **Super Search** to find the desired line, click the search button as seen here:

Then type the desired line in the search box provided.

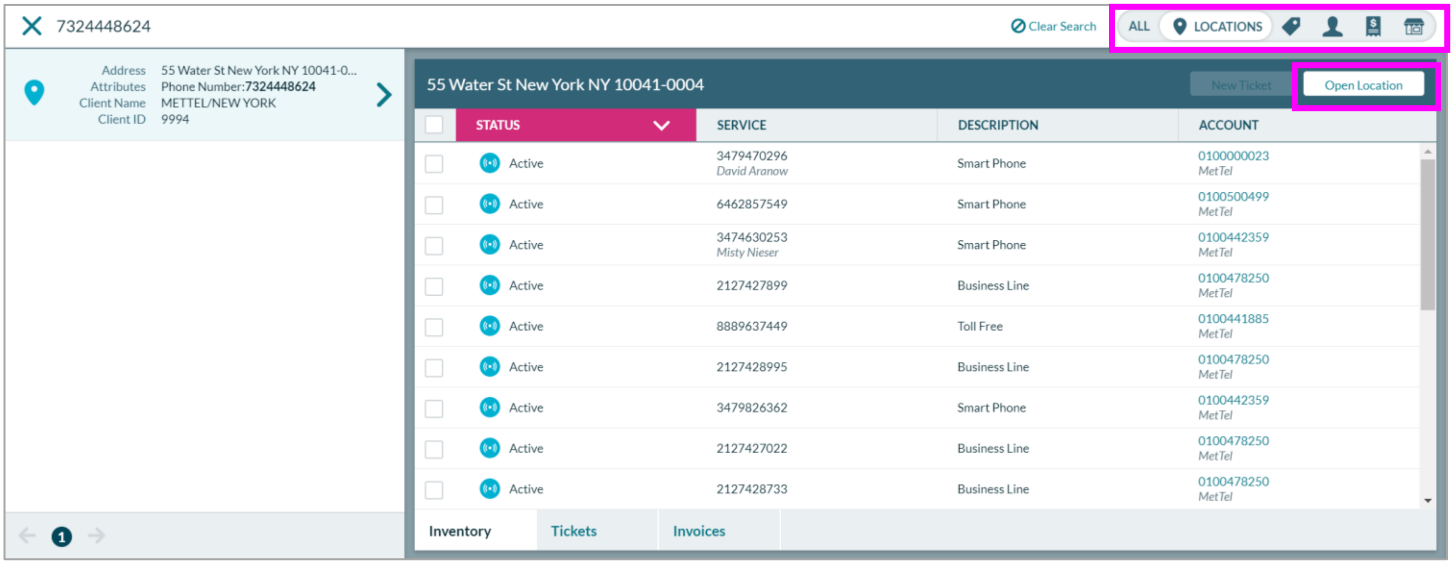
There are filters on the far right side of the Super Search which you can select to narrow down your search results.

The default is **ALL**. From left to right the filters are: all, locations, ticket number, users, account number.

The Super Search will search for the criteria that is input across the portal. Below is a search for the phone number 7324448624. Notice the first two search results pulled up the user associated with this phone number. The third result pulled up the location where this WTN is located.



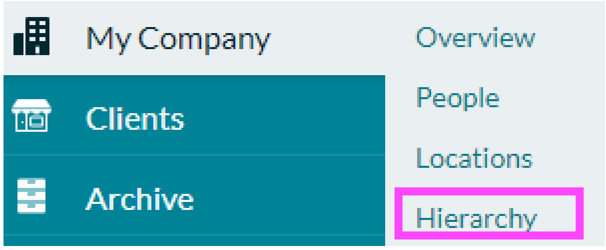
Notice what happens when we select the Locations filter and search the same phone number. It will only pull up the location where this phone number exists. This window will show all inventory at this location. To view only the desired phone number, click **Open Location** located at the right of the Super Search window. This will open a new page with the inventory item.



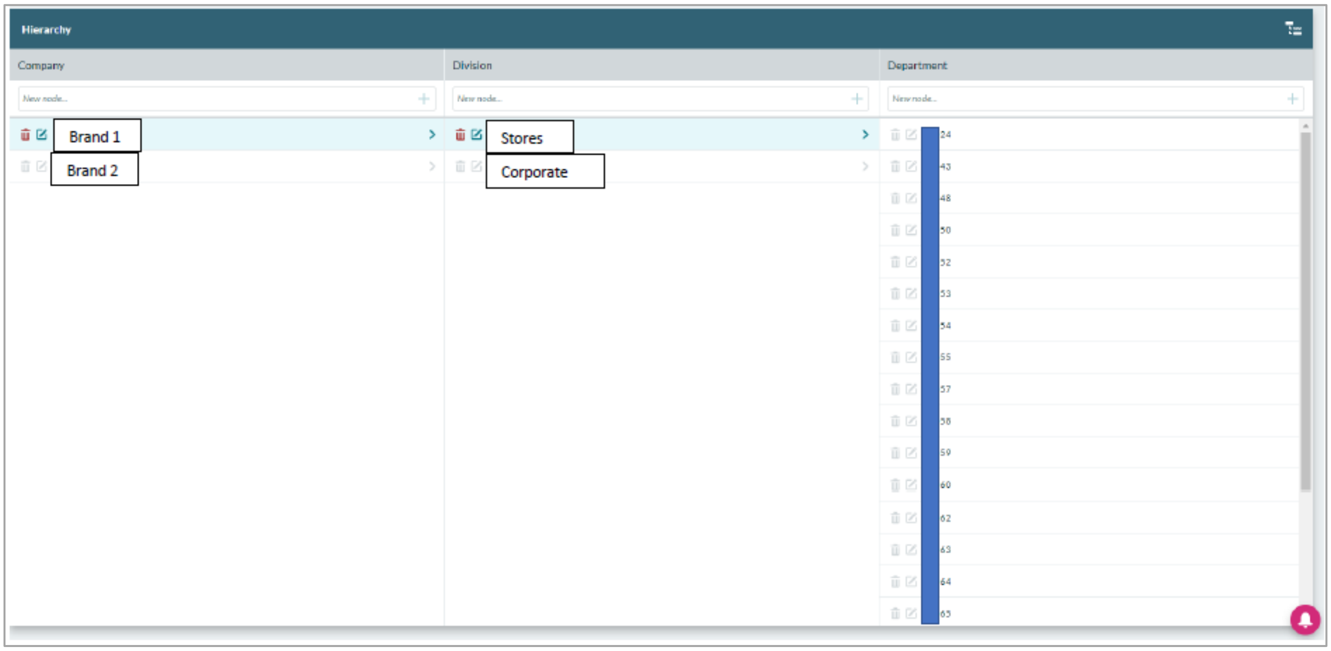
Establishing a Hierarchy

What's a **hierarchy**? Well, it is whatever you can dream it to be! A hierarchy is basically the structure of your business broken down into categories. For example, you can be broken down by region then by store location. Reach out to us if you think your business would benefit from a custom hierarchy structure. Otherwise, we can provide you with what we think is best for your business needs.

The hierarchy page is located in the Main Menu, under the My Company section.

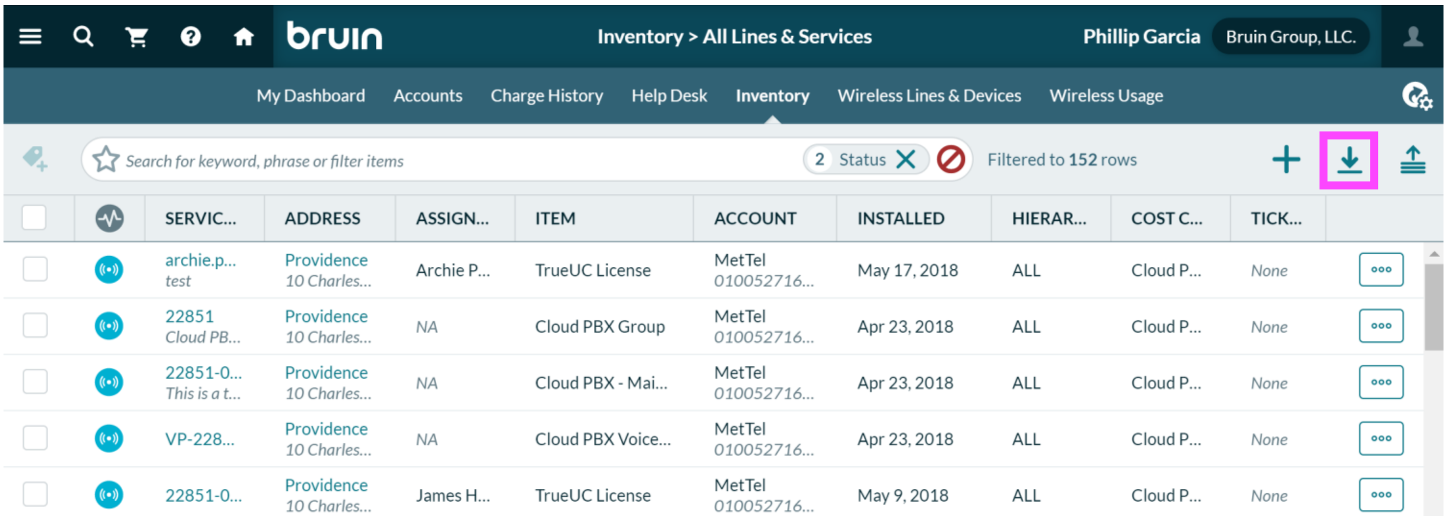


Below is an example of a hierarchy structure. This business is broken down by Brands, Divisions, and Departments.

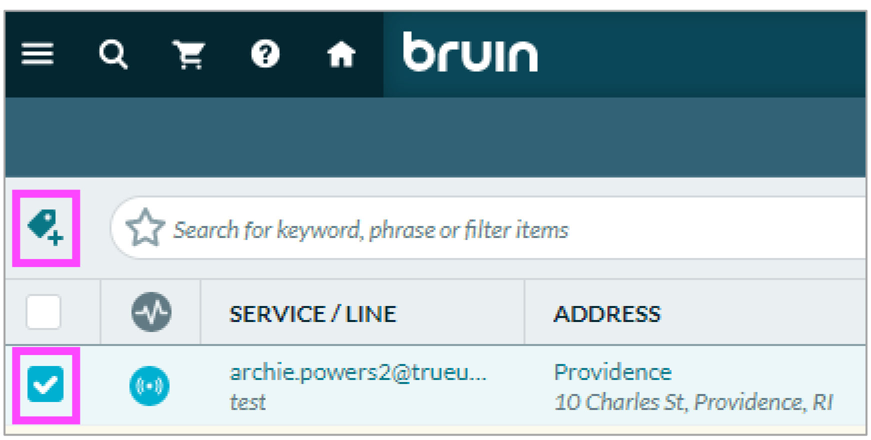


Managing Inventory

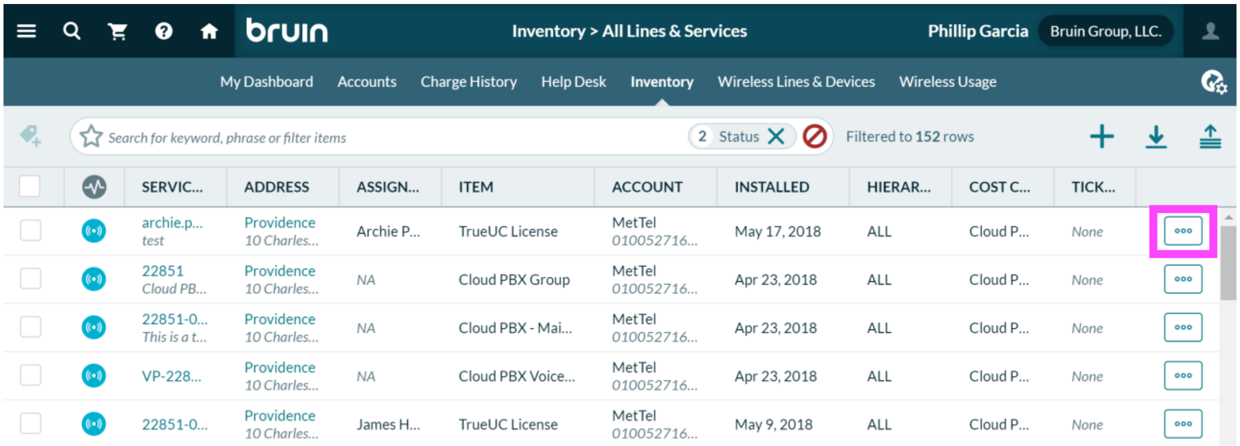
- From the Main Menu, hover over the Inventory section, and click on **All Lines and Services** to get to the Inventory page where you can see all inventory at your company.
- On this page, you can **download inventory** to an Excel spreadsheet using the **Download** button.



- You can open a **New Ticket** on an inventory item by clicking the check box next to the item and clicking the ticket button. You can submit different types of **repair tickets or edit modifications to service.**

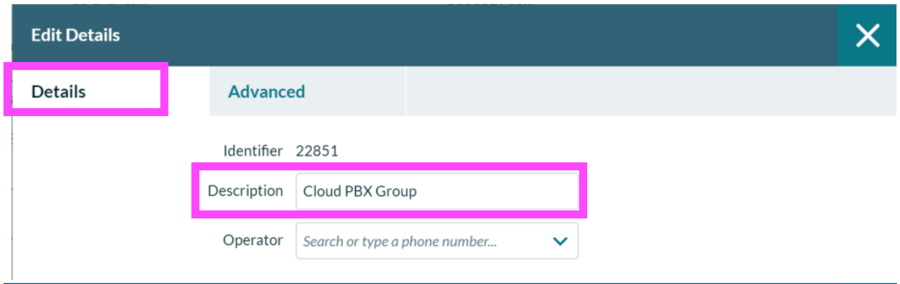


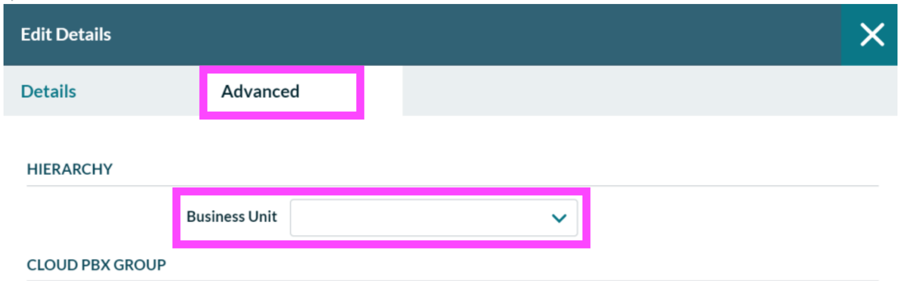
- You can **edit inventory items** by hovering your mouse over the **blue ellipses** on the right side of the page next to the item.



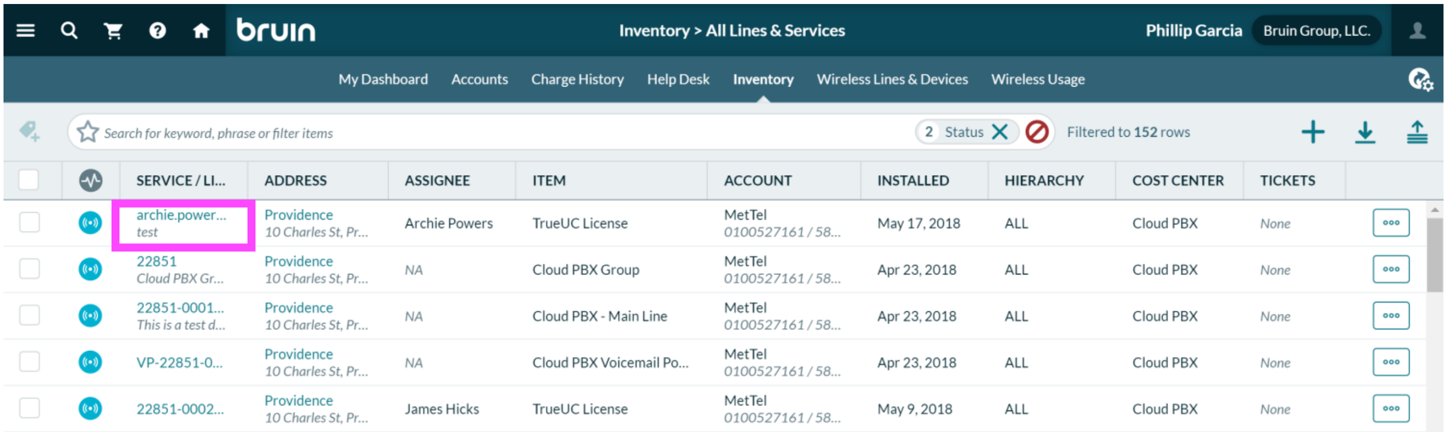
- Then click **Edit Details**.

- Under **Details**, you can edit/add a **Line Description**.
- Under **Advanced**, you can set the **hierarchy for the line**.

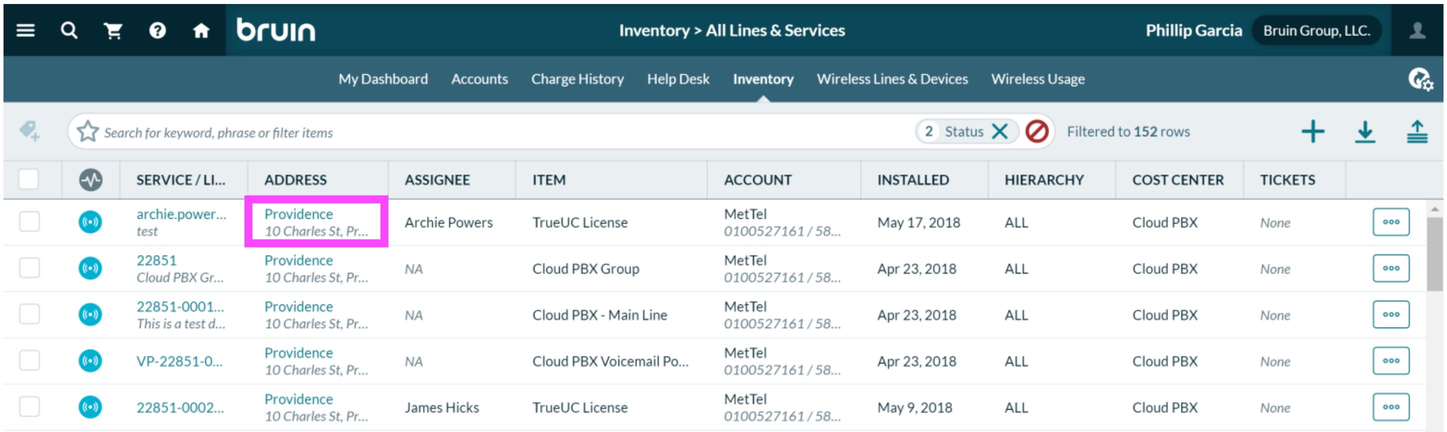




➢ Clicking on a service line will bring you to a new page with the **inventory/asset details**.

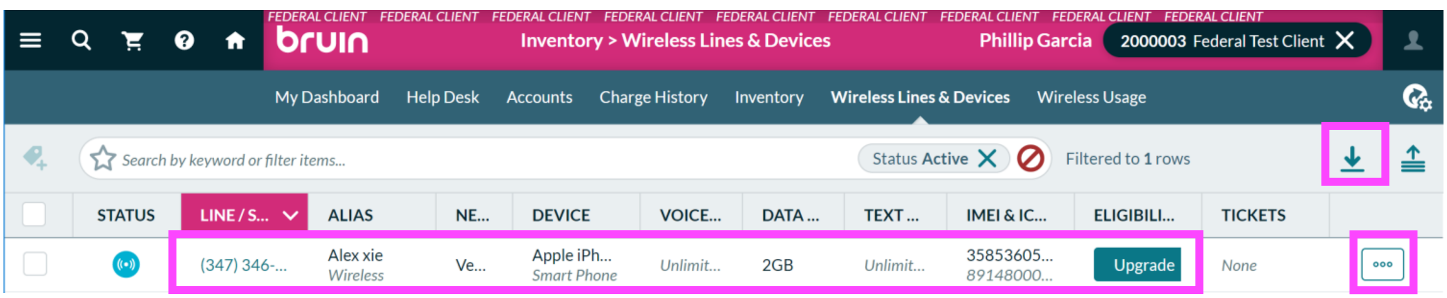


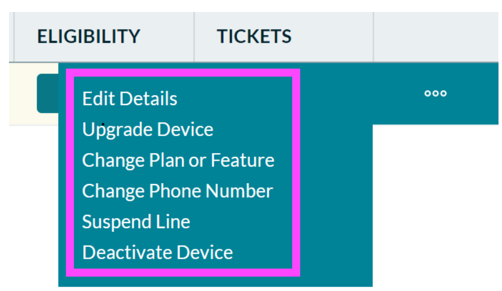
➢ Clicking on a Location in the Address column will bring you to a **Location Details** page with all the assets associated with that location.



Managing Wireless Inventory

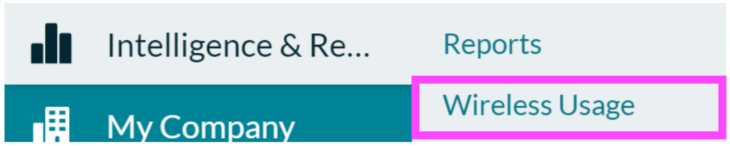
- From the Main Menu, hover over the Inventory section, and click on **Wireless Lines & Devices** to get to the wireless page where you can see all wireless inventory at your company.
- On this page, you can **download inventory** to an Excel spreadsheet using the **Download** button.
- You can see the Inventory details, including:
  - **Line User** – *Who assigned to the device.*
  - **Network**- *AT&T, Verizon, Etc.*
  - **Device**- *Iphone, Samsung Galaxy, Etc.*
  - **Voice/Data/Text Plan**
  - **IMED & ICCID Code**
  - **Eligibility for Upgrade**- *Will either show date when eligible, Value Plan detail, or **Upgrade Button***
    - **Upgrade-** *This button will take you to the New Order Screen to choose your device. See ordering section.*



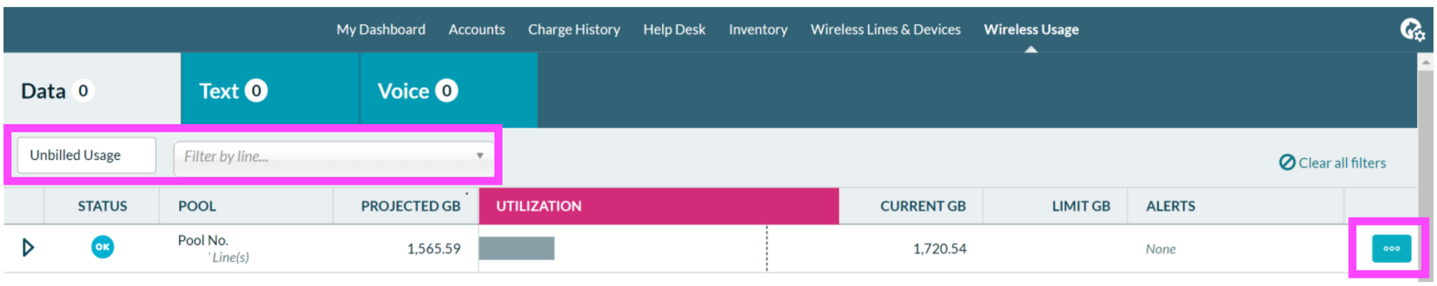


- Hovering over the ellipse to the right will provide **quick links to several mobility ticket tasks**.

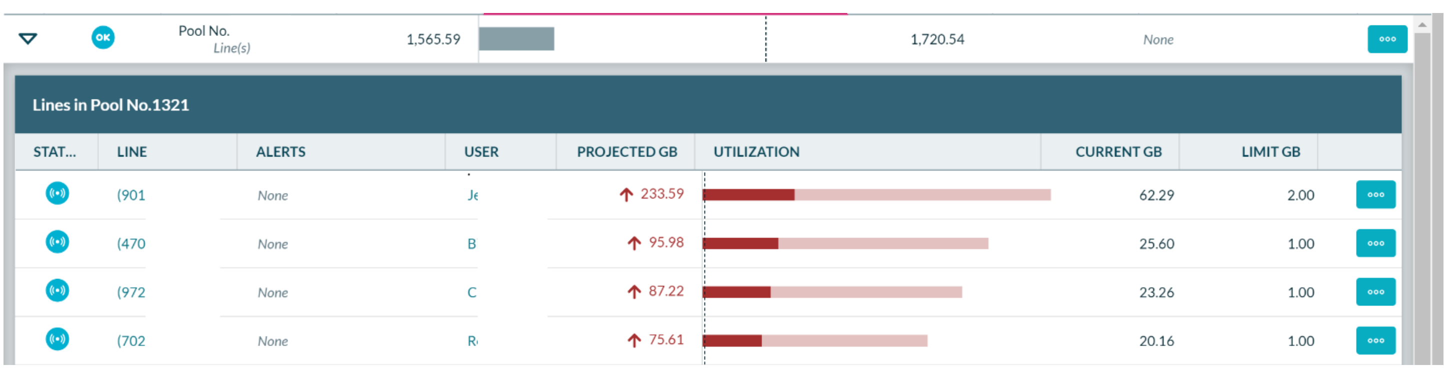
Wireless Usage



- From the Main Menu, hover over the Intelligence & Reports section, and click on **Wireless Usage** to get to the page where you can see all wireless usage at your company.
- On this page, you can **Filter to Past Months** of Data Usage or **Filter by Line** at the **top left.**

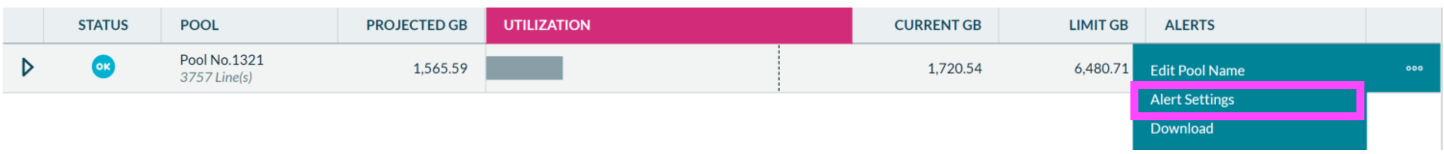


- The Ellipse on the right allows you to **download the usage list** and go to **alert settings**.
- To the left of the Pool, you can select the **Arrow** to Open the Usage Detail
- From the left, you can view:
  - Line Status
  - Number
  - Alerts- *If any alerts were sent out.*
  - Assigned User
  - Projected Data Usage- *How much the line will use by the end of the bill cycle.*
  - Current Data Usage
  - Data Limit
  - Ellipse- *Quick link to suspend and change plan tickets.*

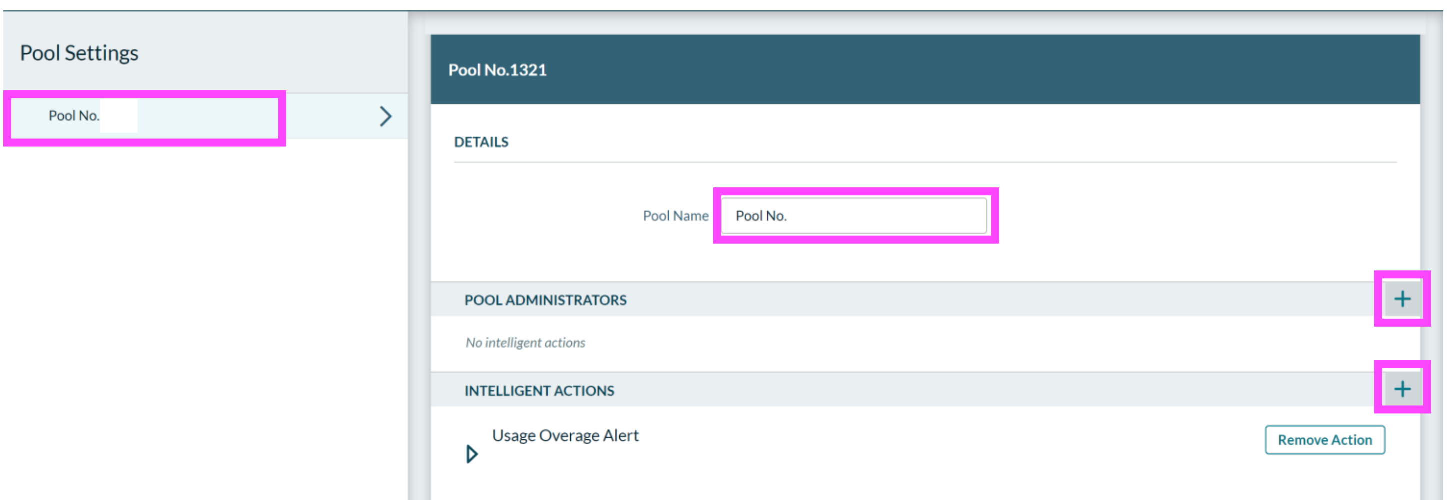


Wireless Alerts/Intelligent Actions

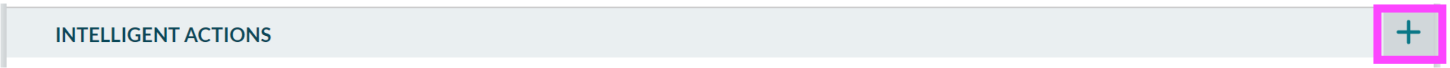
- From the Main Menu, hover over the Inventory section, and click on **Wireless Alerts** to get to the page where you can set up the intelligent actions and alerts for your company.
- This can also be accessed from the **wireless usage page**, from the **ellipse**.



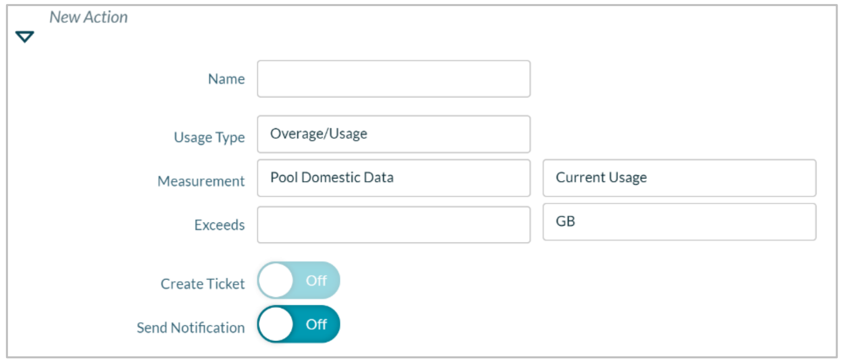
- On the Wireless Alerts Page, you can:
  - Select which data pool you're working.
  - Name the pool.
  - Add/adjust Pool Administrators.
  - Add/Remove/Edit Intelligent Actions.



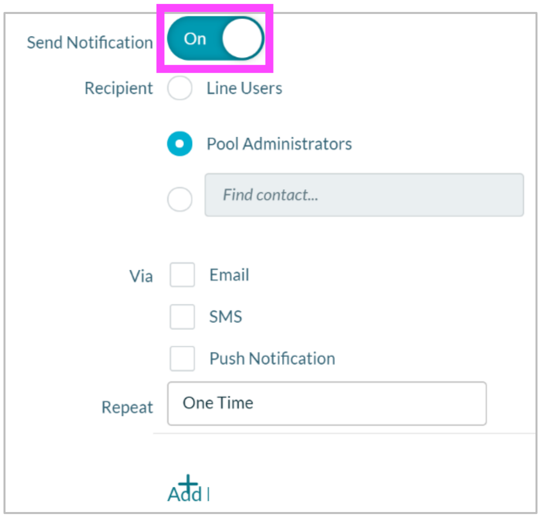
Creating/Managing Intelligent Actions



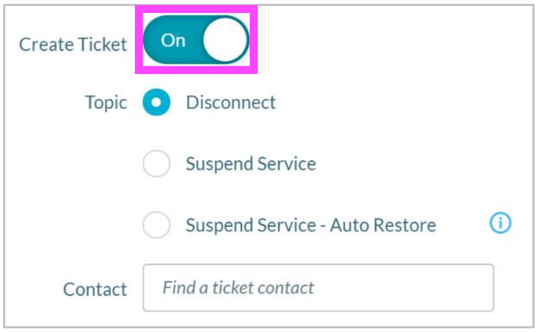
- When on the Alert Settings page, **click the + (Add Intelligent Actions) button**.



- When the **New Action** is open, you can:
  - Name the action.
  - Set the Usage Type- *Overage/Usage or Zero Usage*
  - Set the Measurement- *Pool Domestic Data, Line Domestic Data, Line International Data*
  - Current or Projected Usage
  - Set the Exceeds amount by measure- *GBs, MBs, or Percentage*



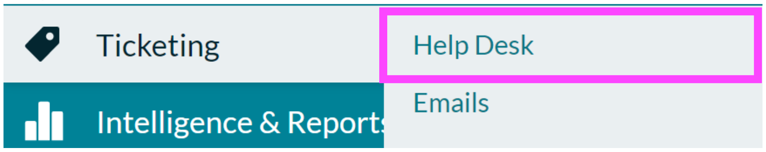
- If you switch on **Send Notification**, you can:
  - Set the Recipient- *Line users, Pool Admins, specific contact.*
  - Set how the notification is sent- *Email, Text, or Bruin Push Notification*
  - Set how much it repeats- *One time, daily, hourly, every other day*
  - Add multiple kinds of notification alerts- *i.e. Pool admins get a one time notification while Line Users get a daily alert.*



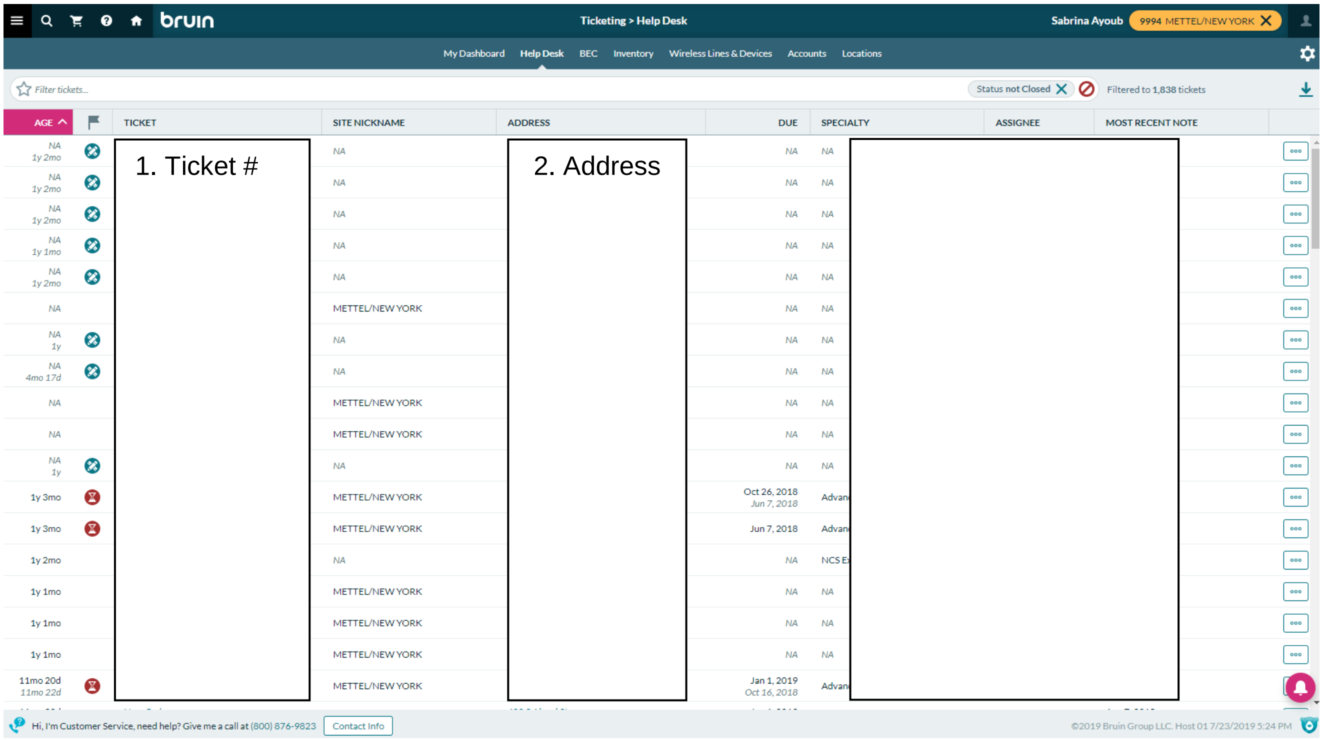
- When You turn on **Create Ticket** (only usable for Line Data):
  - Choose ticket topic
    - Disconnect is great for long term Zero Usage
    - Suspend Service
    - Suspend Service/Auto Restore - *If a service gets suspended, it will be automatically restored at the beginning of the next Bill cycle*
  - Choose Ticket Contact

Viewing Tickets

➢ From the Ticketing section, you can see all **open and closed tickets** at your company in the **Help Desk page.**



➢ All tickets will live on the Help Desk page. This is an example of what the Help Desk dashboard looks like.



1. **Ticket #:** Clicking on the Ticket # will open a new tab with an entire view of the ticket and its notes.
2. **Address:** Clicking on an address will open the **Location Details** page, where you will see all inventory at the selected location.

Creating New Tickets

- There are **two ways to create tickets**. One is a **company-level** ticket and another type of ticket is **asset-level**.
- **Hovering over the Ticketing section** from the Main Menu will also allow you to submit a ticket that is not specific to any inventory. **Some ticket topics you can choose from are training request tickets, support tickets, and more.**

- To submit **inventory specific tickets**, follow the steps below.

1. Select desired line either through **Super Search (Step 2)** or **Inventory page (Step 3)**.

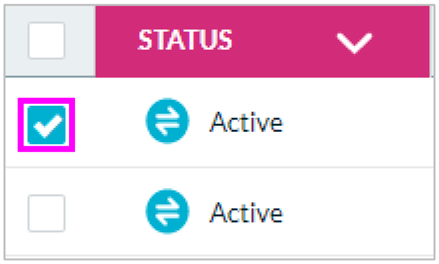
2. To use **Super Search** to find the desired line, click the search button as seen here:

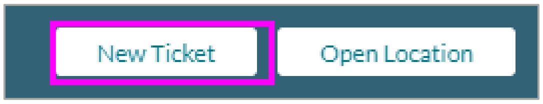
   

   Then type the desired line in the search box provided.

   Your item should appear in the window. Select the **check box** next to the desired line, then click **New Ticket** located in the top right corner.

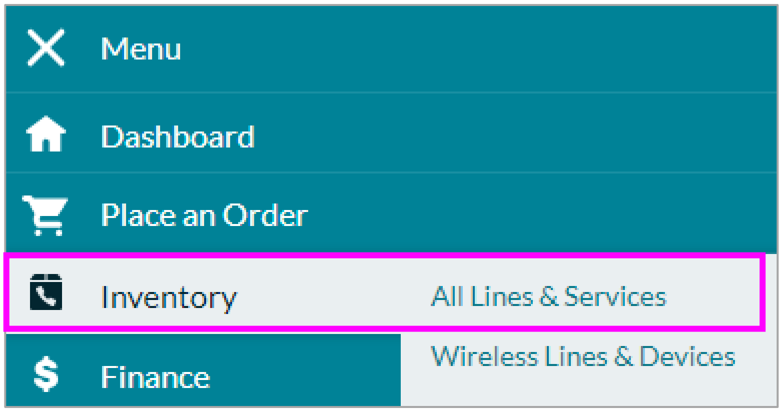
   NOTE: Once you have clicked **New Ticket**, please go to **Step 4.**

3. You can also use the **Inventory** tab to get to the desired line:

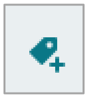
   Click the **Menu button**.

Then hover over **Inventory**. Click **All Lines & Services** to see all inventory.

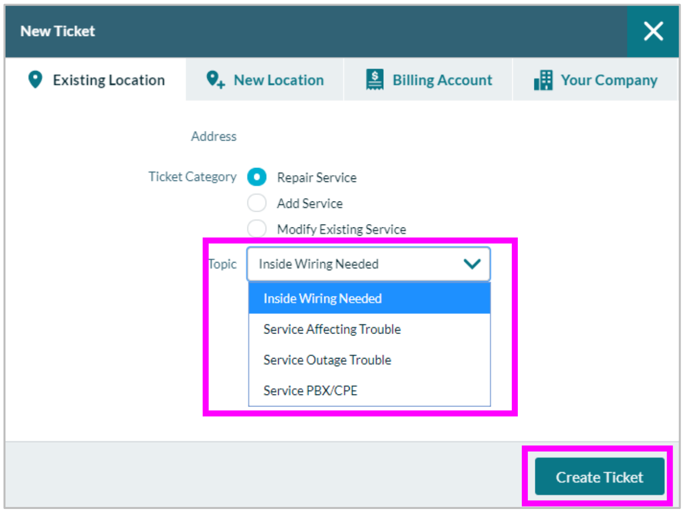


Select the **check box** next to the desired line. Then click the **New Ticket icon** found at the top left of the page.

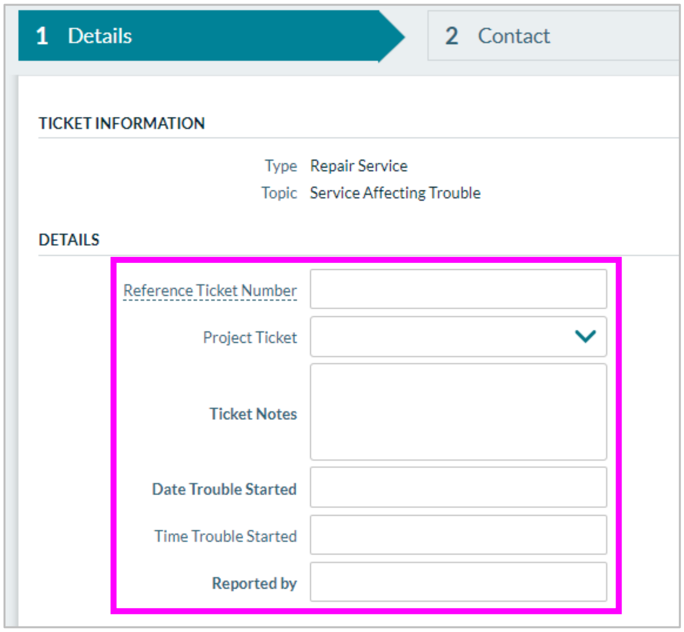


NOTE: Once you have clicked **New Ticket**, please go to **Step 4.**

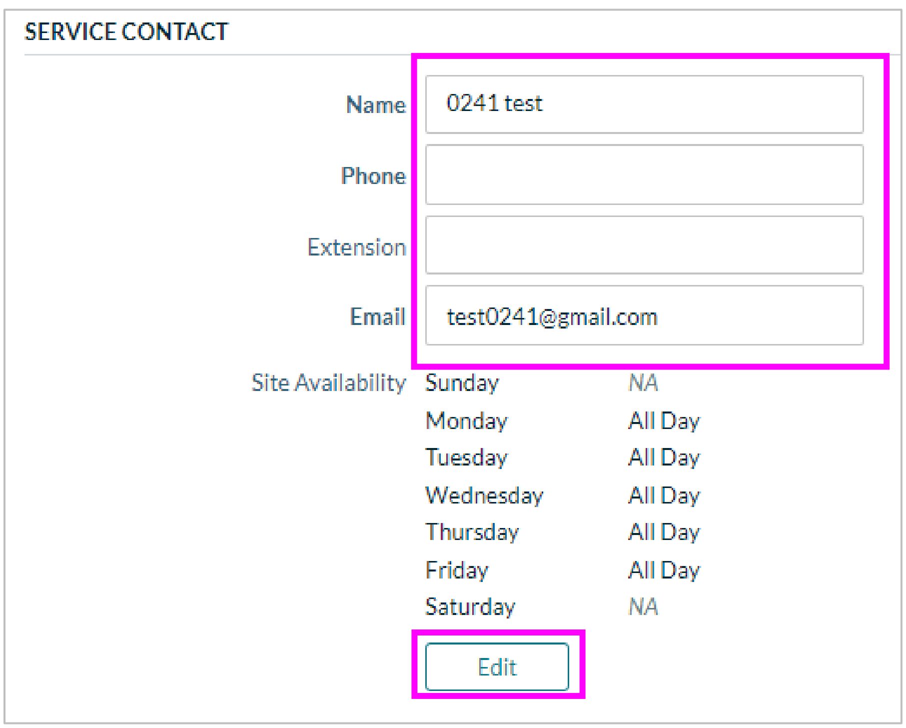
4. After selecting the desired line and clicking **New Ticket**, you will see a page similar to the one below. Now select the **Ticket Type** and choose **Specific Ticket**.
5. Click **Create Ticket**.



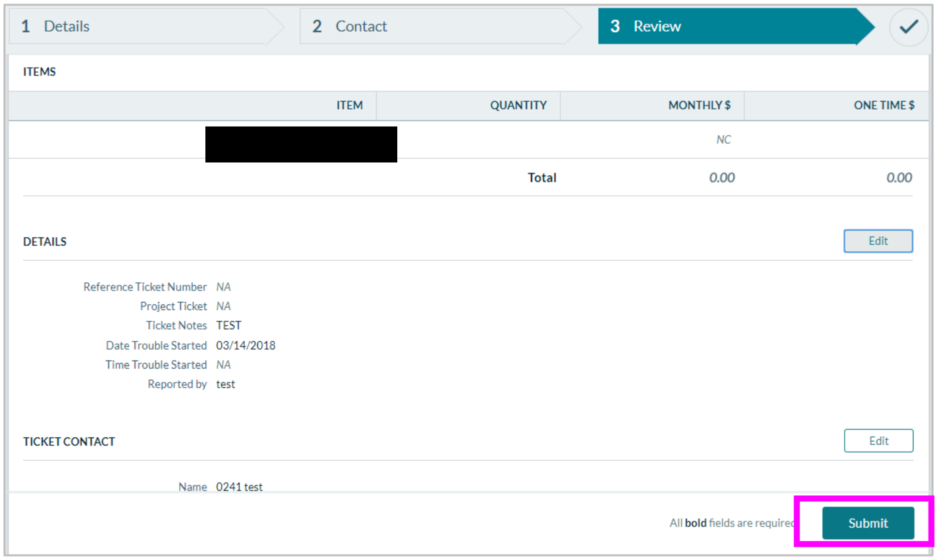
6. Input **Details** (Ticket Notes are useful for clarifying the need for the ticket).



7. Click **Next**.
8. Edit **Service Contact**, **Site Availability**, and **Ticket Contact** as desired.



9. Click **Next**.
10. Review Ticket and click **Submit**.

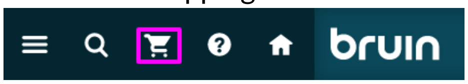


NOTE: Different tickets may ask for different information. However, tickets will follow a similar process.

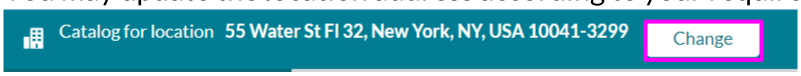
Creating New Order Tickets

➢ To submit **New Order tickets**, follow the steps below.

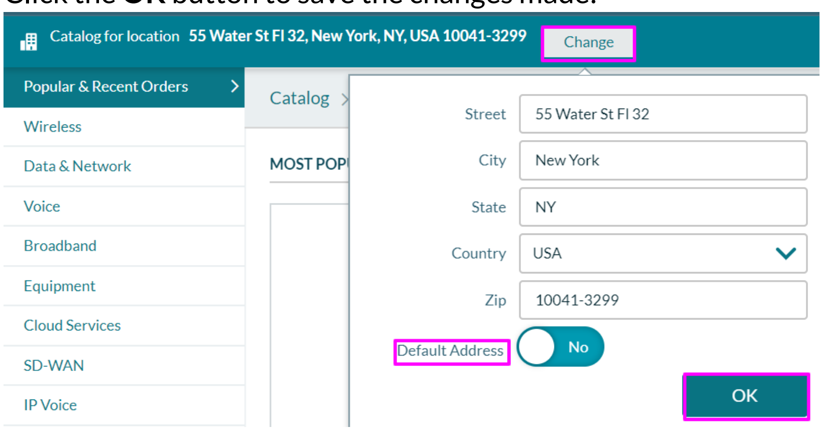
1. Select the Shopping Cart icon as seen here:



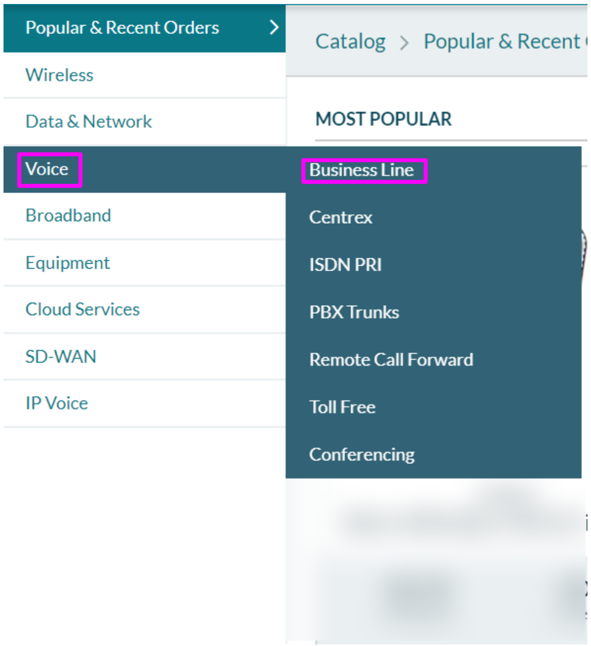
2. You may update the location address according to your requirements



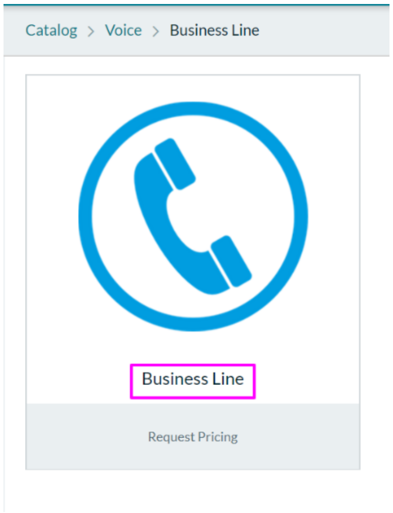
You may choose to make the new address as the **Default** one by choosing **Yes/No** in the **toggle option**. Click the **OK** button to save the changes made:



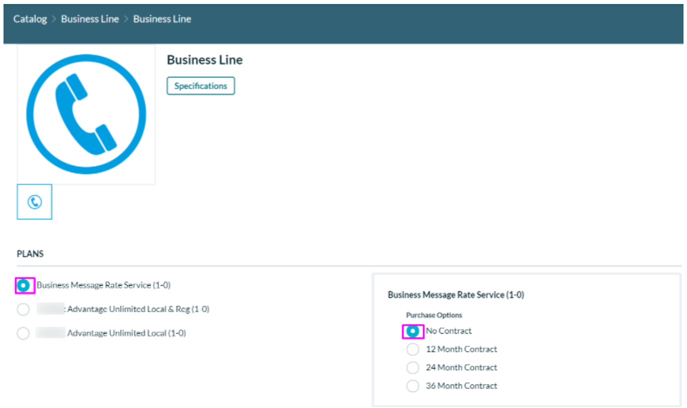
3. Next step would be to choose the **type of Product/Service** you would like to place the order for. For example: **Voice → Business Line** (**Landline**)



4. Choose the desired **Product**:

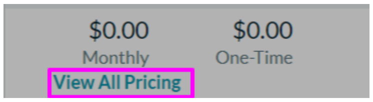


5. Choose the required **Plan**, **Features**, **Additional Features** and **Purchase Options**.

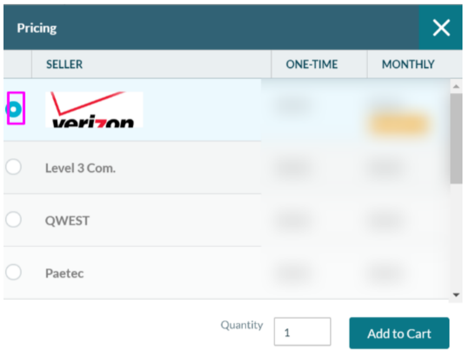


6. Select the **Add to Cart** button

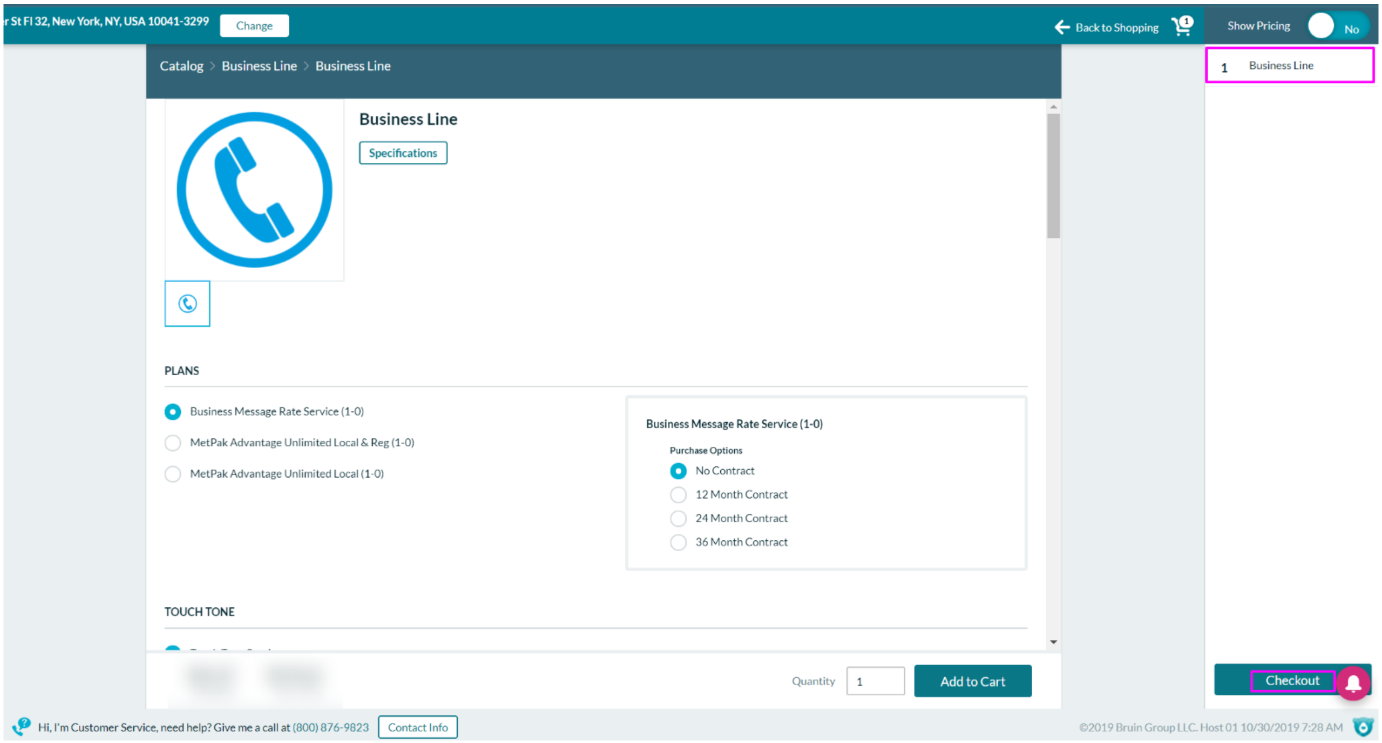
If it is a **TEM product**, then you may choose the **Vendor** of your choice from the **View All Pricing.**



Select **Add to Cart** button after choosing the **Vendor**:



7. Select the **Checkout** button to fill in information related to the product.

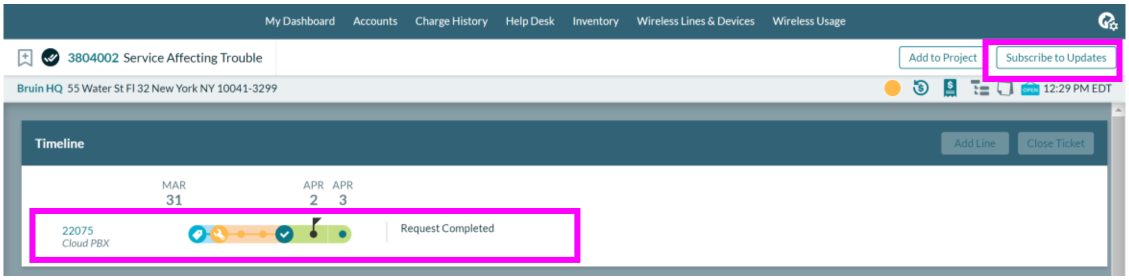


8. Follow **steps 13-17** from **Creating New Tickets** topic.
9. Fill in the **required** fields to successfully **submit** the ticket.

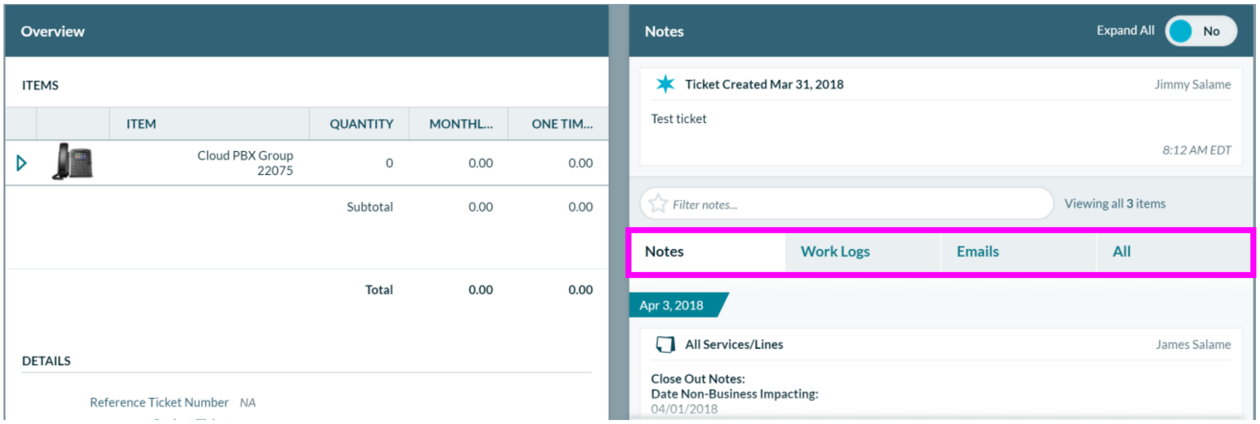
Viewing/Managing Tickets

➢ With tickets created, there are several things you can do to manage the ticket.

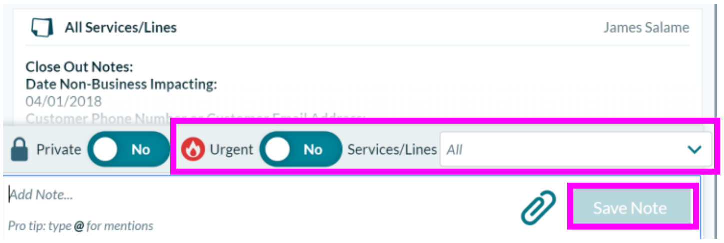
1. When viewing the ticket, the top shows the ticket number and location to the right. On the left, you can view location info and click **Subscribe to Updates** to **subscribe yourself or others** to the ticket.
2. In the Timeline Section, you can view the Ticket's **Timeline**, which has info on **work completed, the current task, and who's assigned to the ticket.**



3. Scrolling down the ticket, you can view on the left the Overview, which is all of the info input at the beginning of the ticket.
4. On the right, you can view the **notes, work logs, and emails** relating to the ticket. You can use the smart filter to filter the notes.

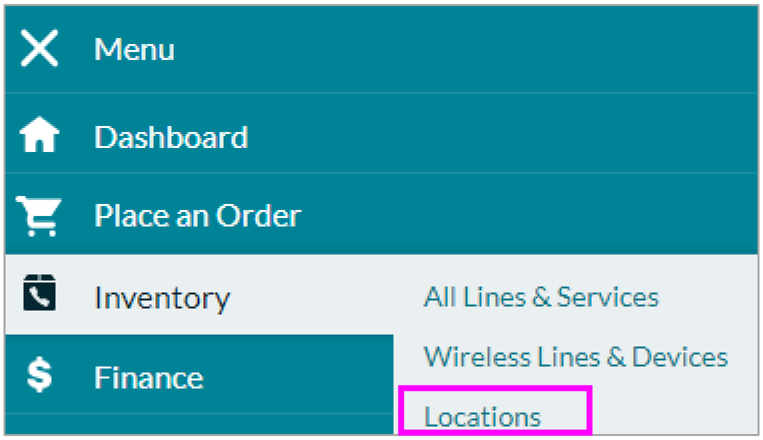


5. You can **add notes** in the **Add Note Section**. You can select **Urgent** to urgent alert those on the ticket. When your note is written, click **Save Note**.

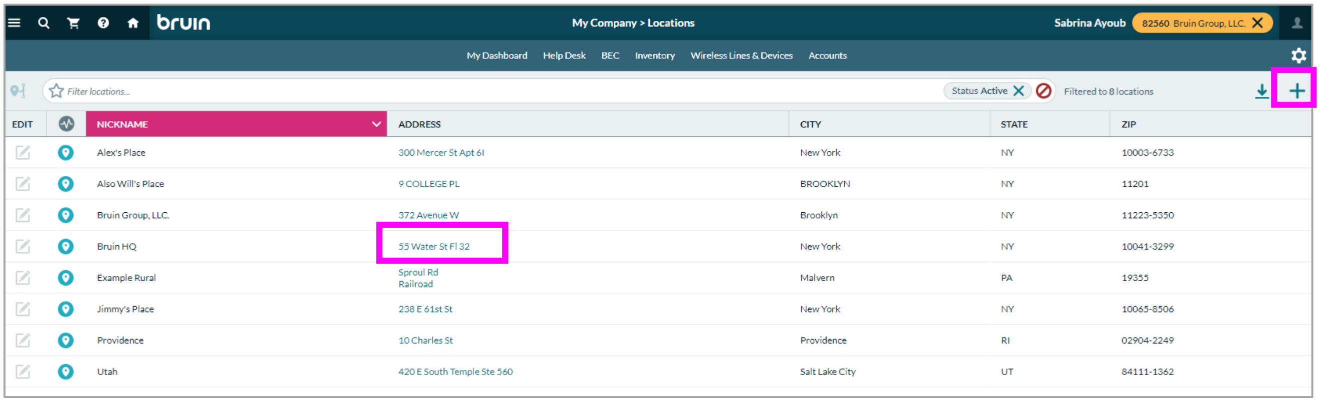


All About Locations

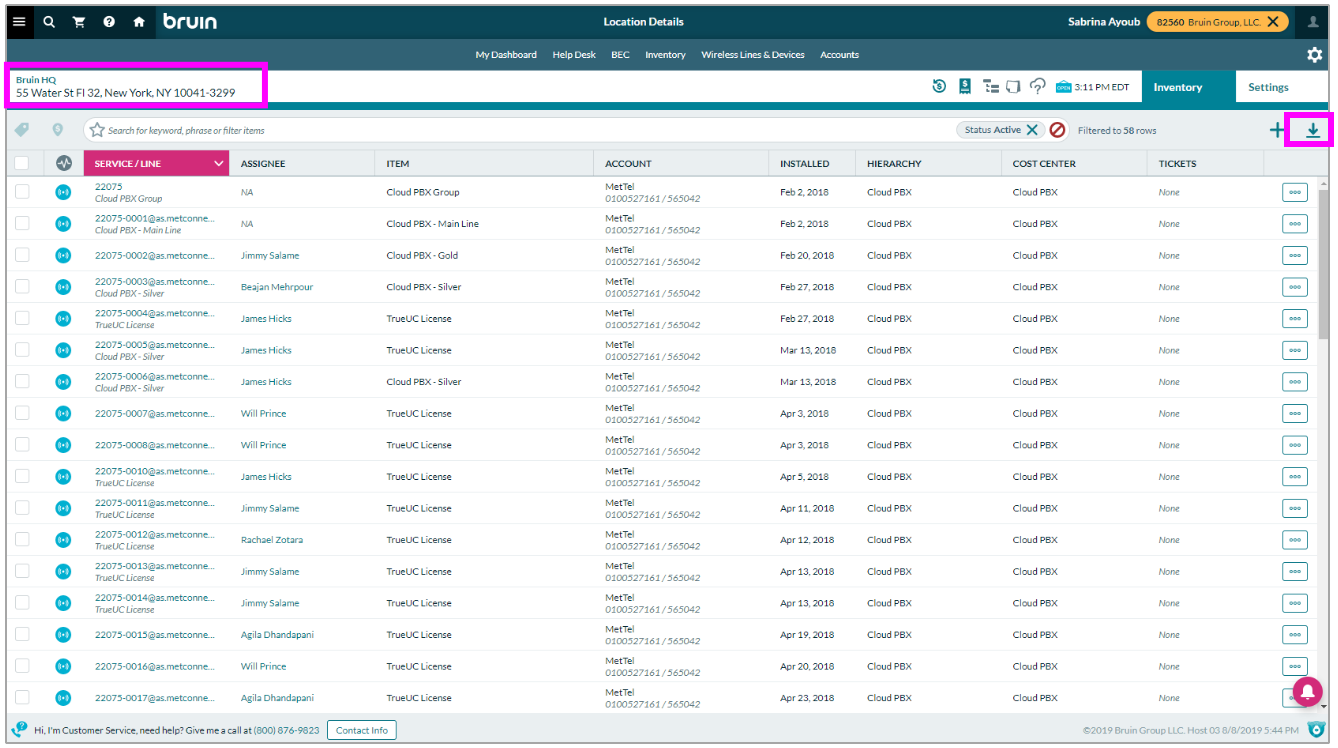
- There are **two different types of location-based pages**. One is the **Locations page** which shows all addresses/locations at your company. The other is the **Location Details page** which displays all assets at the selected location.
- To get to the **Locations page**, go to the Main Menu, hover over Inventory, and click **Locations**.



- The **Locations** page will show you all addresses/locations at your company. You can add additional locations by clicking the **+** button in the top right corner.

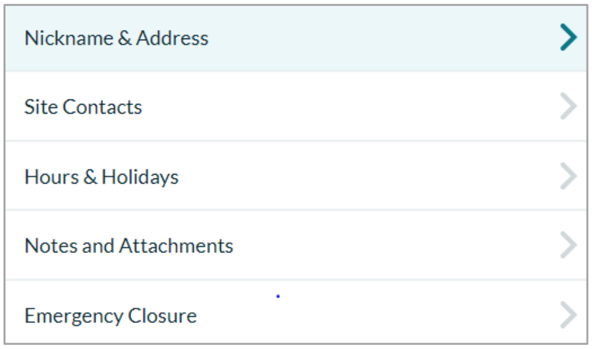


- Clicking on an Address will bring you to the **Location Details** page. Here you will find all assets associated with this location. You can download all these assets and/or create a new ticket on an asset. In the top left you will notice the location's nickname "Bruin HQ" and the address. In the top right corner, you can download all the inventory on this page.



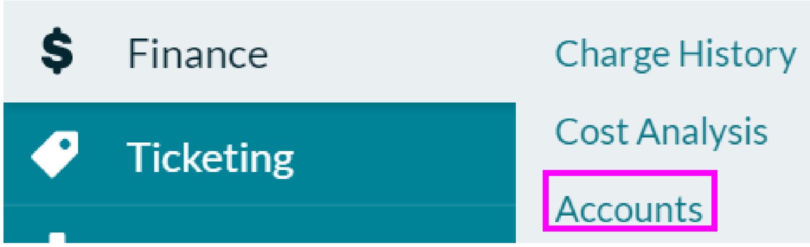
➢ By clicking on the Settings tab in the top right corner of this page, you will have more options to edit information at this location:

➢ From the Settings page you can edit:

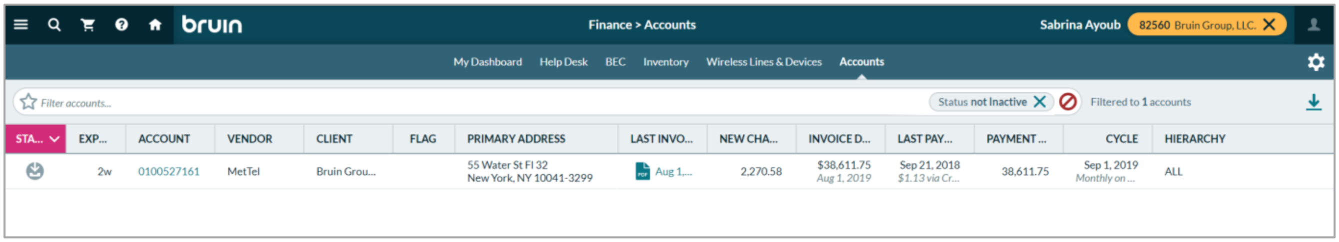


Finance, Accounts, and Invoices

- The **Accounts** page allows you to view current balance, last payment received, and a clickable PDF version of the most recent invoice. To get to the accounts page, go to the Main Menu and hover over the finance tab. Click on **Accounts**.

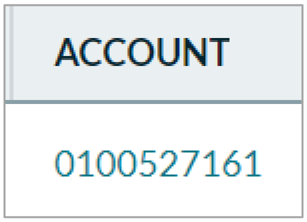


- **Clicking on an account number** will allow you to view **historical invoices** as well.

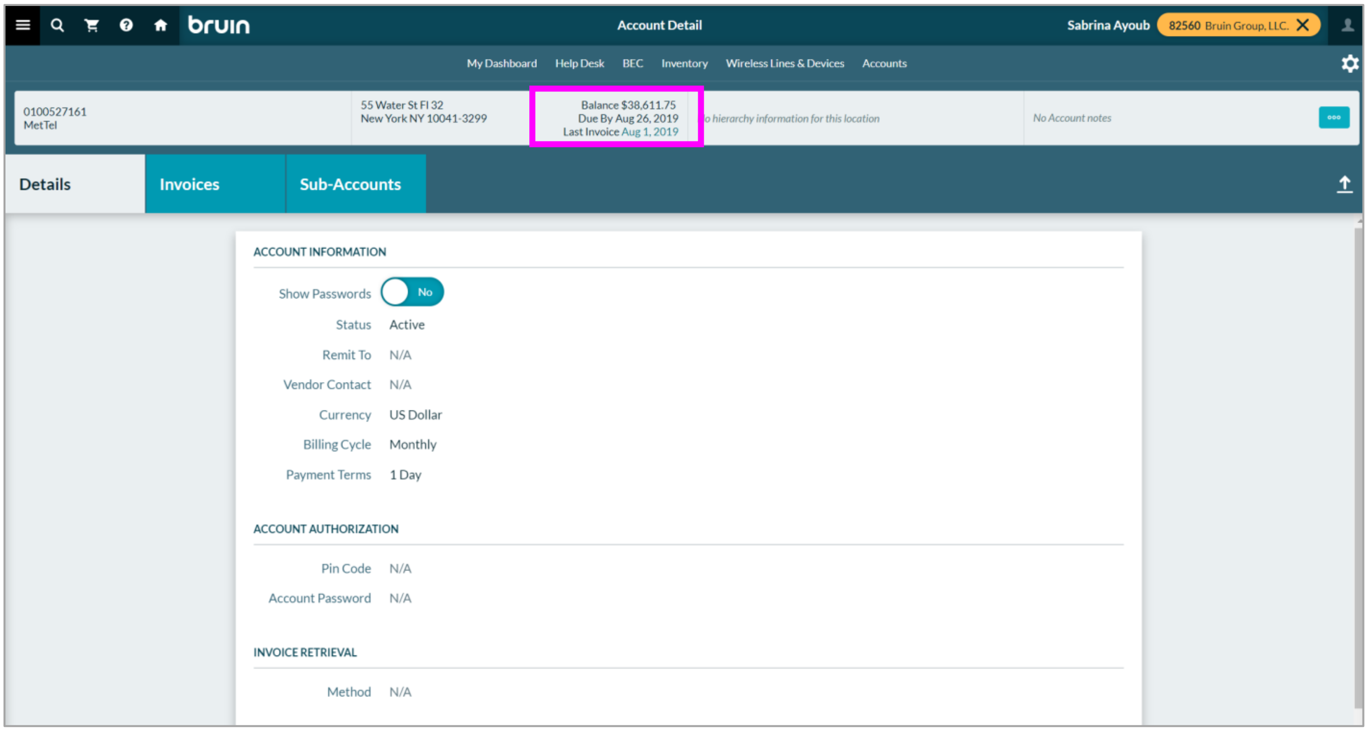


The **status** column shows the status of the payment.
The **expected** column shows the expected due date of the next payment.
The **account** column displays the account #.
The **vendor** column displays the various vendors.
The **flag** column would display any flags or issues found regarding the invoice.
The **address** column displays the primary billing address.
The **last invoice** column is a clickable PDF of the most recent invoice.
The **new charges** column shows the dollar amount of any new charges on the account.
The **invoice due** column shows the dollar amount due and the due date of the payment.
The **last payment** column shows the last received payment.
The **payment due** column shows the payment that is due.
The **cycle** displays the billing cycle.

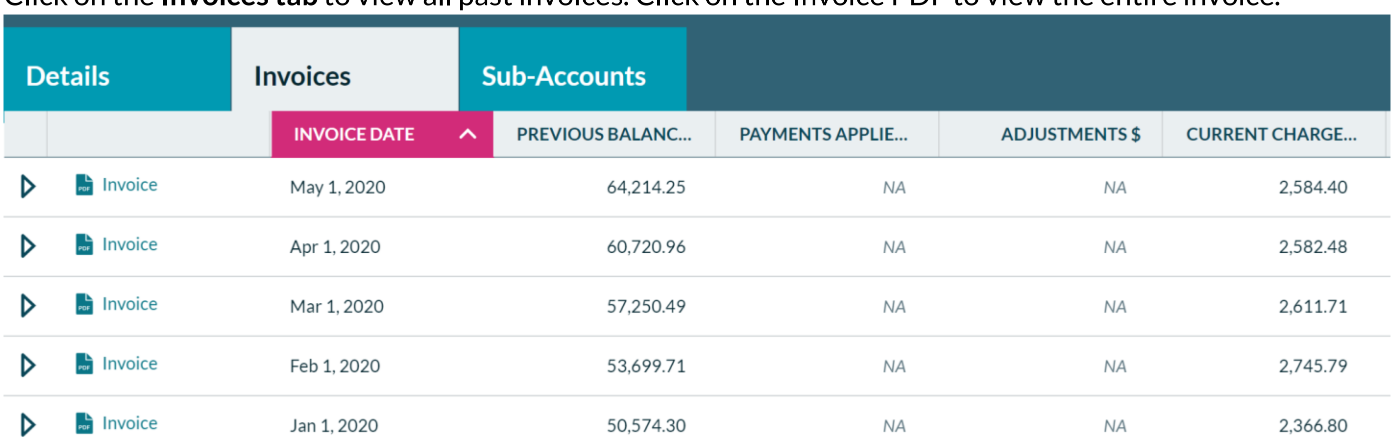
- The **account # is clickable**. Click on the account # to see more details regarding the account, payments, and PDFs with historical invoices.



Clicking on the account # will bring you to **the Account Detail page**. In the top center of the page you will be able to see the account balance and its due date.

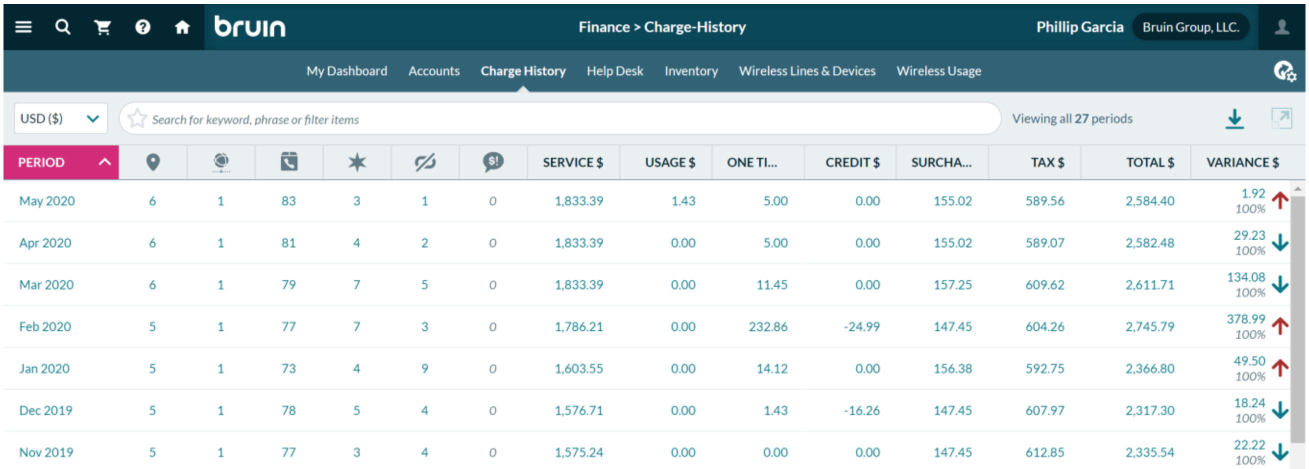


Click on the **Invoices tab** to view all past invoices. Click on the Invoice PDF to view the entire invoice.



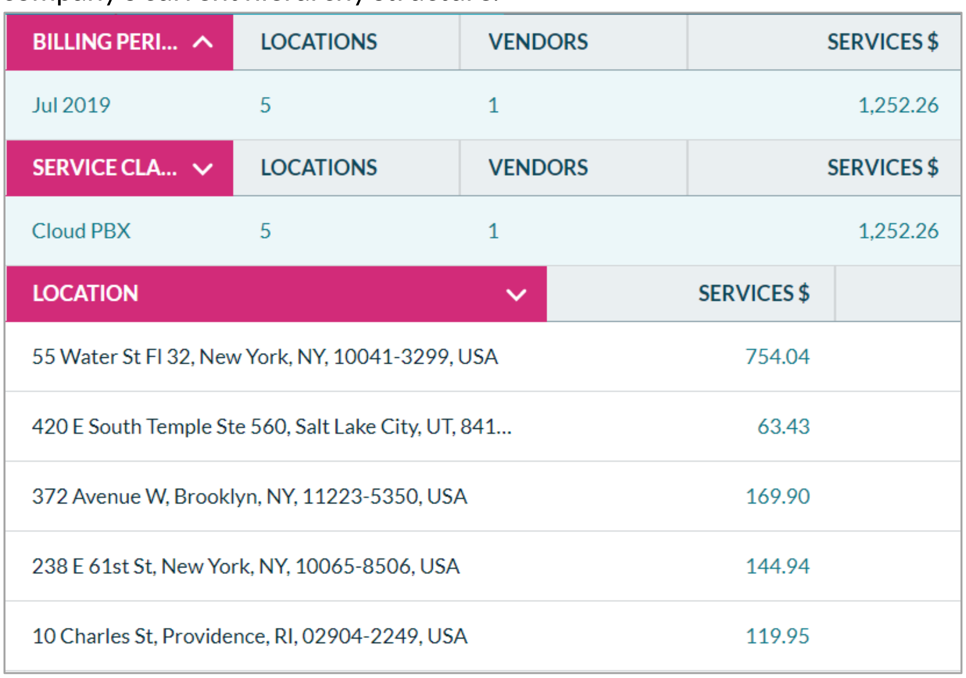
	INVOICE DATE	PREVIOUS BALANC...	PAYMENTS APPLIE...	ADJUSTMENTS $	CURRENT CHARGE...
Invoice	May 1, 2020	64,214.25	NA	NA	2,584.40
Invoice	Apr 1, 2020	60,720.96	NA	NA	2,582.48
Invoice	Mar 1, 2020	57,250.49	NA	NA	2,611.71
Invoice	Feb 1, 2020	53,699.71	NA	NA	2,745.79
Invoice	Jan 1, 2020	50,574.30	NA	NA	2,366.80

- The **Charge History** page allows you to see a breakdown of charges across billing periods, hierarchies, locations, and more. The Charge History page is located on the Main Menu, under the Finance tab.



PERIOD							SERVICE $	USAGE $	ONE TI...	CREDIT $	SURCHA...	TAX $	TOTAL $	VARIANCE $
May 2020	6	1	83	3	1	0	1,833.39	1.43	5.00	0.00	155.02	589.56	2,584.40	1.92 100%
Apr 2020	6	1	81	4	2	0	1,833.39	0.00	5.00	0.00	155.02	589.07	2,582.48	29.23 100%
Mar 2020	6	1	79	7	5	0	1,833.39	0.00	11.45	0.00	157.25	609.62	2,611.71	134.08 100%
Feb 2020	5	1	77	7	3	0	1,786.21	0.00	232.86	-24.99	147.45	604.26	2,745.79	378.99 100%
Jan 2020	5	1	73	4	9	0	1,603.55	0.00	14.12	0.00	156.38	592.75	2,366.80	49.50 100%
Dec 2019	5	1	78	5	4	0	1,576.71	0.00	1.43	-16.26	147.45	607.97	2,317.30	18.24 100%
Nov 2019	5	1	77	3	4	0	1,575.24	0.00	0.00	0.00	147.45	612.85	2,335.54	22.22 100%

- Clicking on July 2019, then clicking on Cloud PBX (the hierarchy level for this client profile) will then bring us to a granular view of charges by location. Please note that this breakdown is customized based on your company's current hierarchy structure.



BILLING PERI...	LOCATIONS	VENDORS	SERVICES $
Jul 2019	5	1	1,252.26

SERVICE CLA...	LOCATIONS	VENDORS	SERVICES $
Cloud PBX	5	1	1,252.26

LOCATION	SERVICES $
55 Water St Fl 32, New York, NY, 10041-3299, USA	754.04
420 E South Temple Ste 560, Salt Lake City, UT, 841...	63.43
372 Avenue W, Brooklyn, NY, 11223-5350, USA	169.90
238 E 61st St, New York, NY, 10065-8506, USA	144.94
10 Charles St, Providence, RI, 02904-2249, USA	119.95

Clicking on a service charge will drill you into this detail:

My Dashboard Accounts **Charge History** Help Desk Inventory Wireless Lines & Devices Wireless Usage

USD ($) | Search for keyword, phrase or filter items | Viewing all 9 items

PERIOD							SERVICE $	USAGE $	ONE TI...	CREDIT $	SURCHA...	TAX $	TOTAL $	VARIANCE $
Jul 2019	5	1	71	2	1	0	1,518.24	0.00	7.98	0.00	150.14	608.38	2,284.74	101.80 100%

TYPE	DESCRIPTION	LINES	AVERAGE RATE $	UNITS	TOTAL $
Monthly Services	TrueUC License	33	25.29	33	834.67
Monthly Services	Cloud PBX Main Line License - Unltd	9	20.55	9	184.91
Features	Eqp Rental	16	6.64	20	132.70
Monthly Services	MetTel Total Care	16	4.99	20	99.80
Features	911 Emergency Service Listing	49	1.85	49	90.65

Clicking on the Lines in the Units column would bring us to this view:

PERIOD							SERVICE $	USAGE $	ONE TI...	CREDIT $	SURCHA...	TAX $	TOTAL $
Jul 2019	5	1	71	2	1	0	1,518.24	0.00	7.98	0.00	150.14	608.38	2,284.74

TYPE	DESCRIPTION	LINES	AVERAGE RATE $	UNITS
Monthly Services	TrueUC License	33	25.29	33

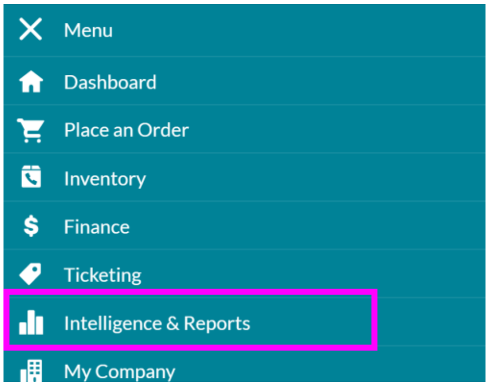
LINE	TYPE / PLAN	ASS...	LOCATION	INVOICE	UNITS
22851-0002@as.m... Cloud PBX	TrueUC License	J..	Providence 10 Charles St, Providen...	MetTel 0100527161	1
jimmy.salame@true... Cloud PBX	TrueUC License	J..	Bruin HQ 55 Water St Fl 32, New...	MetTel 0100527161	1
23048-0005@as.m... Cloud PBX	TrueUC License	A..	Bruin Group, LLC. 372 Avenue W, Brookly...	MetTel 0100527161	1
23048-0003@as.m... Cloud PBX	TrueUC License	A..	Bruin Group, LLC. 372 Avenue W, Brookly...	MetTel 0100527161	1
22075-0005@as.m... Cloud PBX	TrueUC License	J..	Bruin HQ 55 Water St Fl 32, New...	MetTel 0100527161	1

Intelligence & Reporting

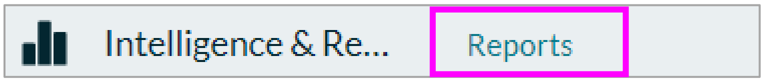
- The **Reports page** allows you to access different reports, download them, and even subscribe your email to receive these on a schedule of your choosing.

1. Click on the menu button in the top left corner of Bruin.

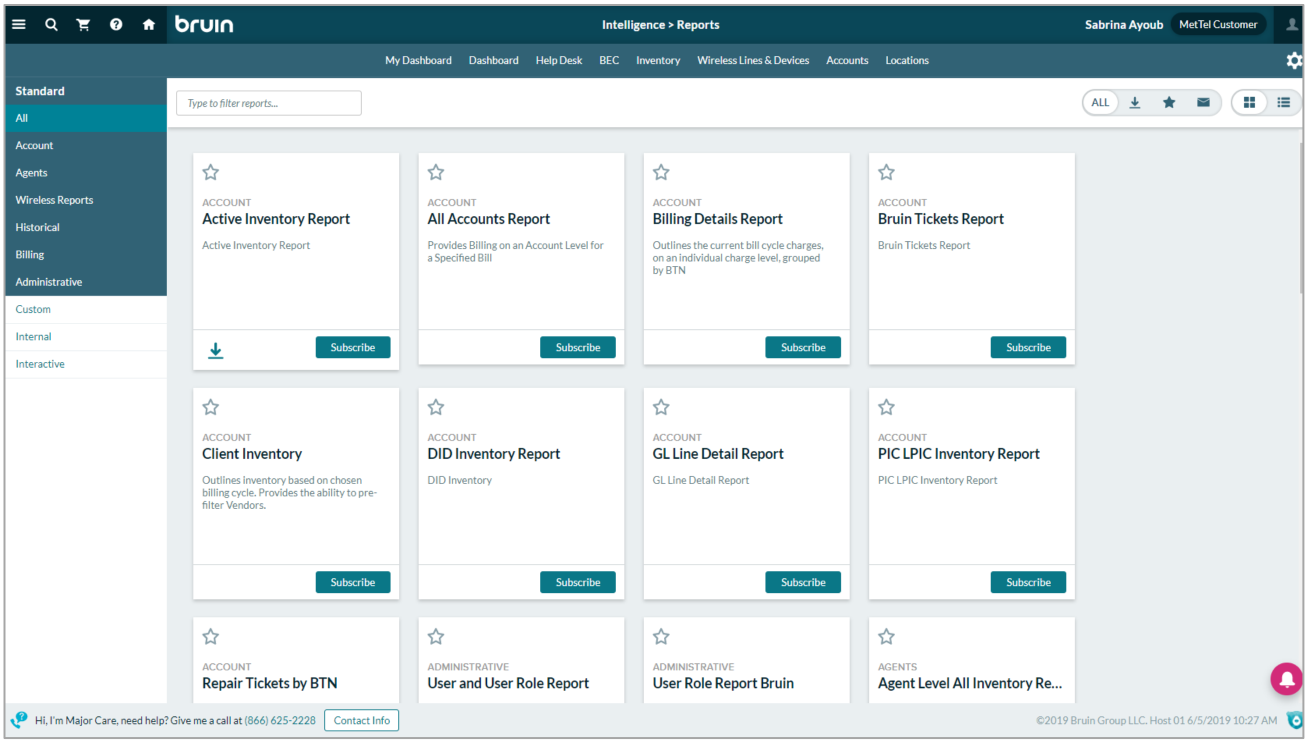
2. Hover over **Intelligence & Reports**:



Click on **Reports**:

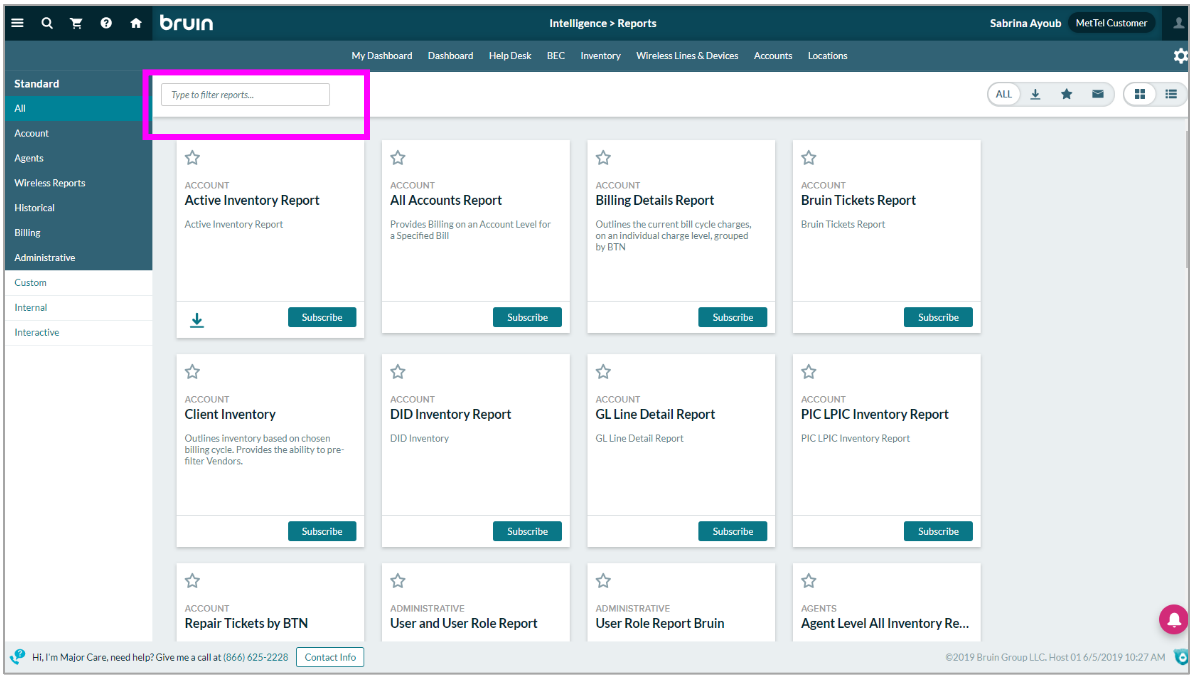


3. Now you know how to navigate to the Reports page!

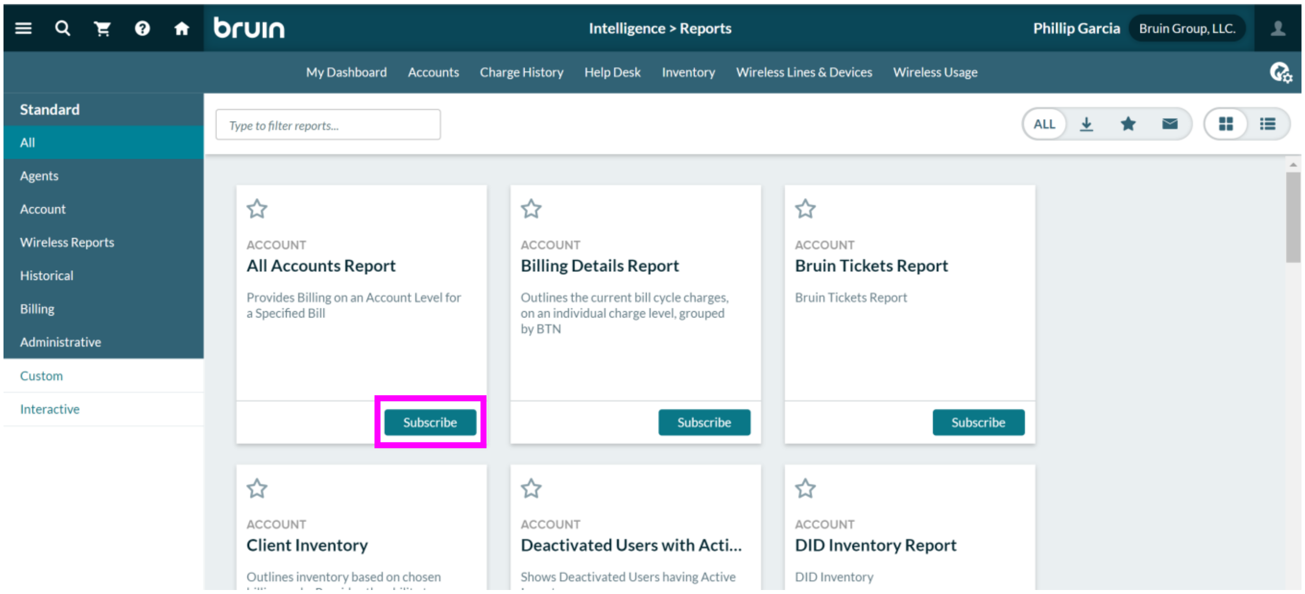


Subscribing to Reports

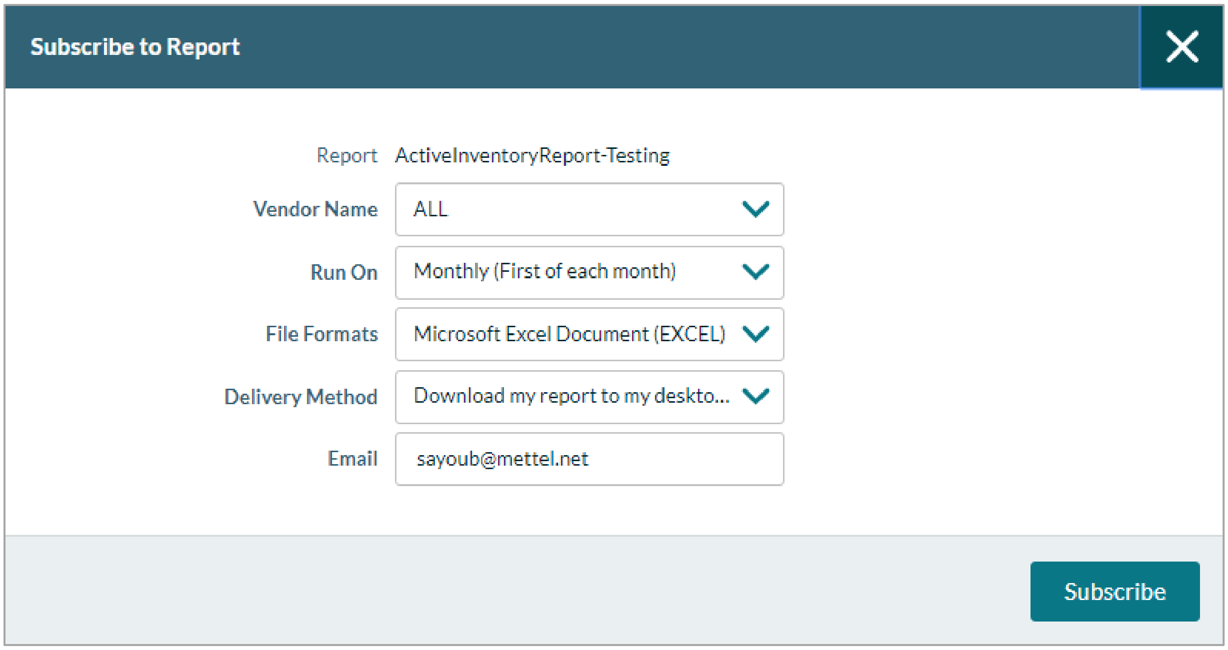
1. You can search for Reports by typing keywords into the search bar.



2. You can **Subscribe to a Report** to receive the Report on a daily, weekly, or monthly schedule. First, click on the **Subscribe** button.



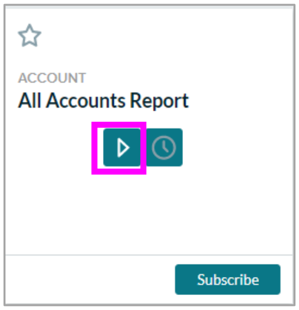
3. This window will pop up:



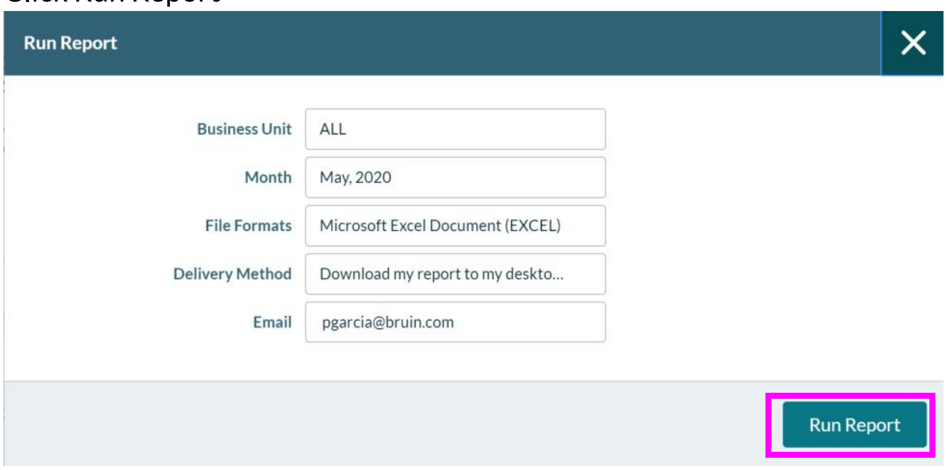
4. You can then click on the drop-down menus to see additional options.
5. **Tip**: When subscribing to receive Reports, a good practice is to select "Email my report when it is ready" for the **Delivery Method**. This way, the report will be sent as an email attachment straight to your inbox!
6. When you're done, click the **Subscribe** button.

Running a Single Report

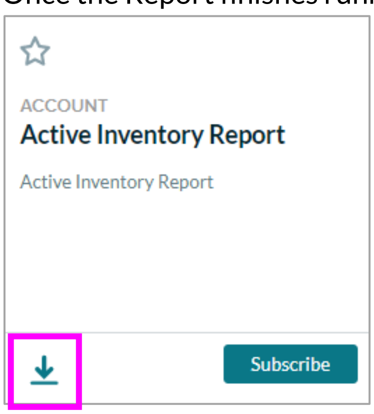
1. To simply **Run** a report once, hover over your desired Report and click the triangle button:



2. With the pop up, set the parameters how you want the report to pull.
3. Click Run Report

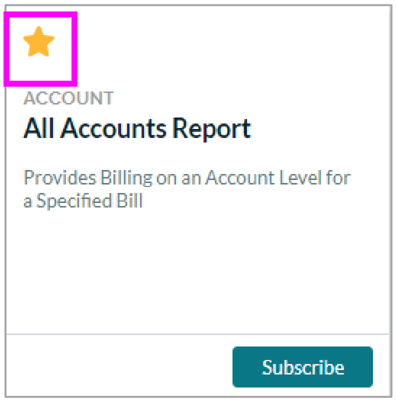


4. Once the Report finishes running, you will see this symbol. Click on it. This will then download to your files.

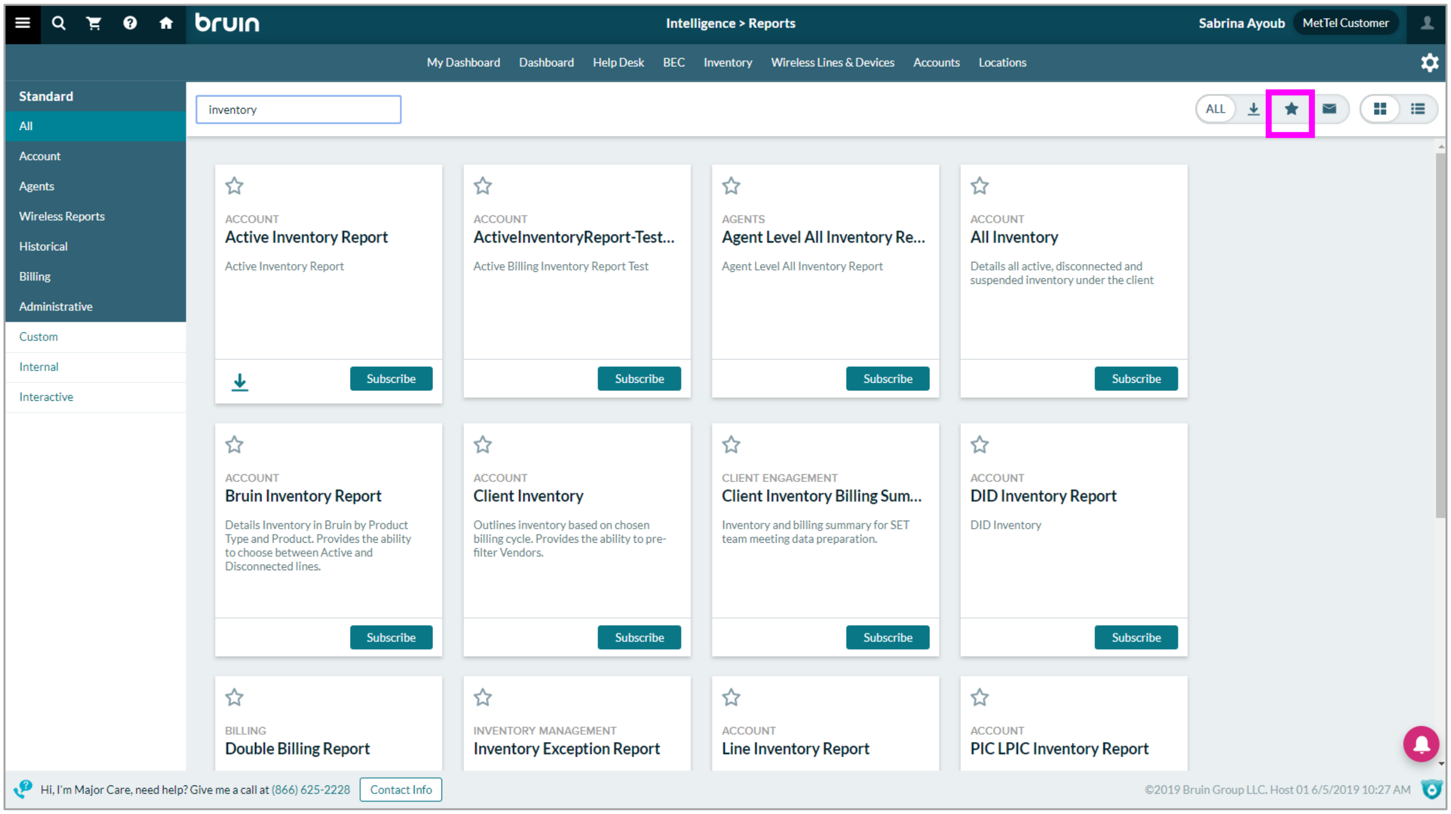


Favoriting a Report

5. To **Favorite** a Report, click on the Star icon on your desired Report.

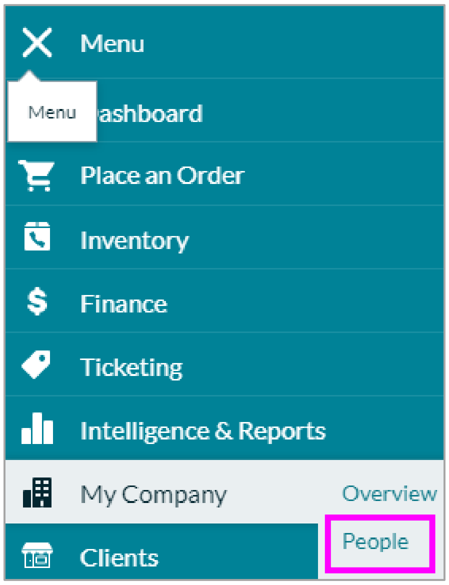


6. To access a Favorite Report, click on this icon:

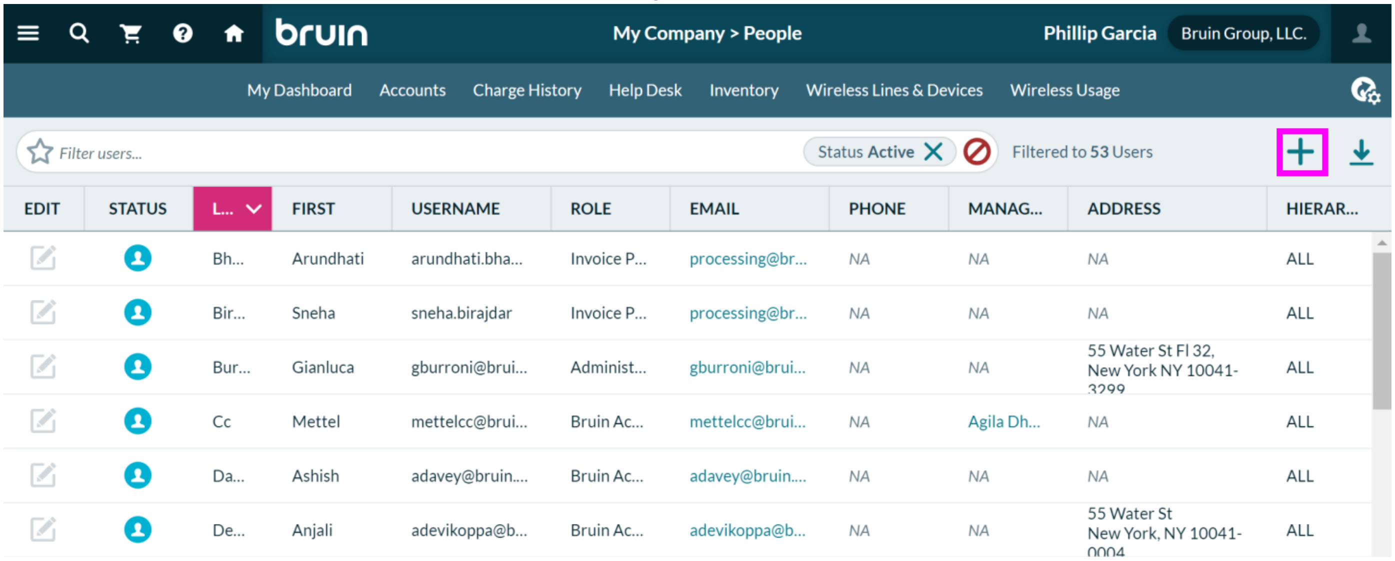


Adding Users and Managing My Company

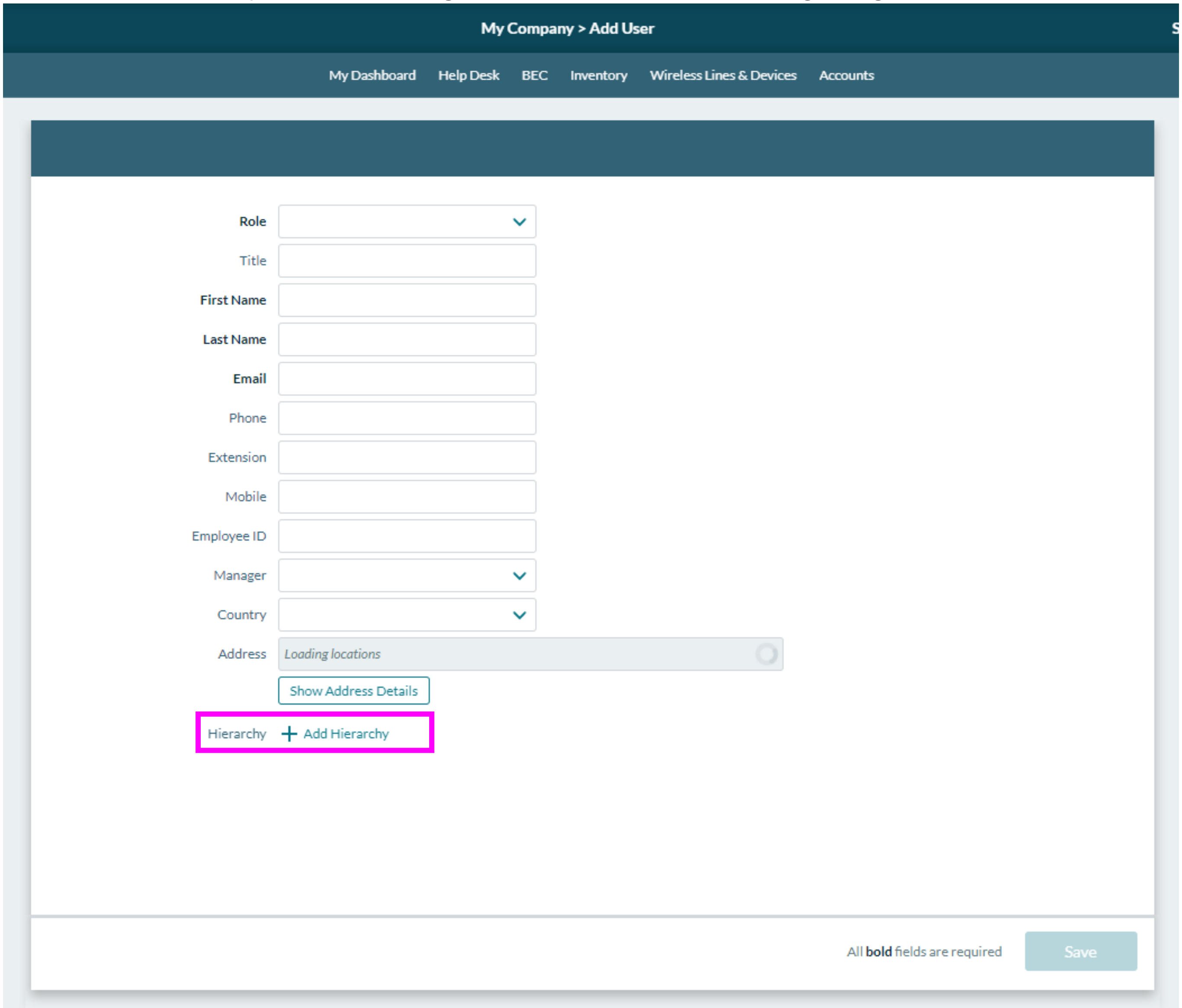
- The **People** page allows you to add new user, edit users, and more.
- To navigate to the People page, go to the Main Menu, hover over My Company, and click People.



- To add new users, click on the **+** button in the top right corner.



- Input the appropriate information when adding your new user. The required fields are **bolded.** The user's email address is usually the username login. See below for information regarding **Role** selection.



- Above you will see **+ Add Hierarchy** which is a way to limit certain user access. If you have hierarchies established in your online portal, then restrictions can be put in place for certain users to only be able to view information pertaining to certain hierarchy levels.
- You must select a **Role** for your new user. See the following for descriptions:

The Default Roles

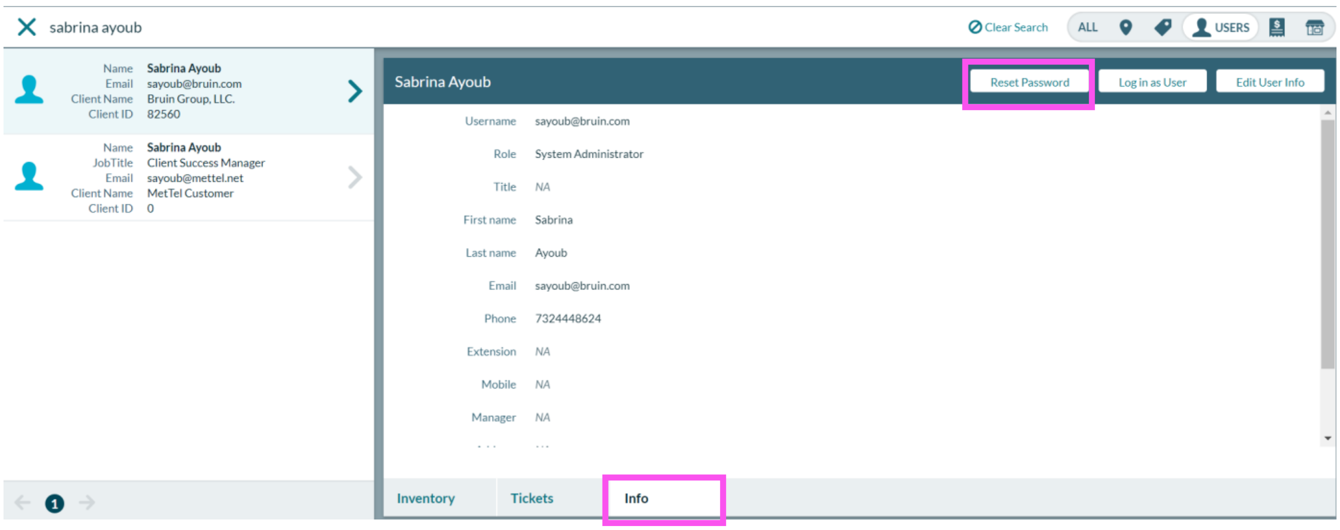
- **Administrator**:
  - Company-level access
  - All ticket creation
  - Full Billing Access
  - User management (Creation, password resets, etc.)
  - Manage mobility (Usage Alerts, Pool Admins, etc.)
  - Inventory management and editing
  - Assign users and/or hierarchies
- **Help Desk and Ordering:**
  - Company-level access
  - All ticket creation (including new orders)
  - No billing or user management
  - Inventory management and editing
  - Pull reports
- **Help Desk:**
  - Company-level access
  - Ticket creation (Modify Existing Service and Repair)
  - No New Orders
  - Inventory management and editing
  - Pull reports
- **Billing and Finance:**
  - Company-level access
  - View billing information
  - Edit accounts (if necessary)
  - View Inventory
  - Pull reports
- **End User:**
  - Personal inventory access
  - View Tickets related to their inventory
  - Create Tickets related to their inventory
  - View Charge History for their inventory
- **Contact Only/Order Only:**
  - Shell role
  - For user creation during a new order
  - For assigning users to lines who won't access Bruin (i.e. Mobile lines)
  - Users created with this role will not get a password setup email

- Let's note a few more things about roles.
  - **Custom Roles**: We can create custom roles in and limit certain restrictions for a client at the role level. Some commons roles that clients may request are Approval + Admin roles. For example, say a client wants to have one person approve all orders before they are submitted.
  - Users cannot be deleted, but they can be deactivated.
  - **Limitations of Roles**: For clients, Administrator is top of the food chain, therefore they have full control of their company's account and can add & deactivate users. One limitation is that an Administrator cannot deactivate another Administrator's account. But an Administrator can deactivate lower weighted roles.

➢ **Note:** For a customized role/permission setup, please contact a Bruin specialist.

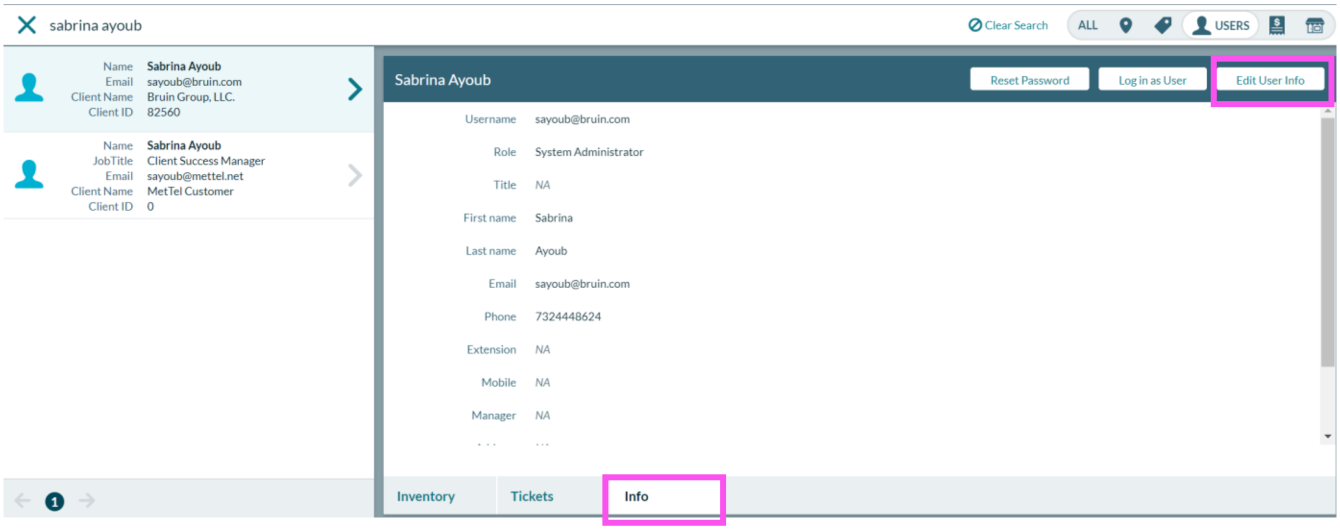
Resetting a Bruin user's password

➢ Use the Users filter in Super Search to find the individual. Type the person's name into the search bar. You will then see something similar to below. Click **info**. Then click **reset password.**

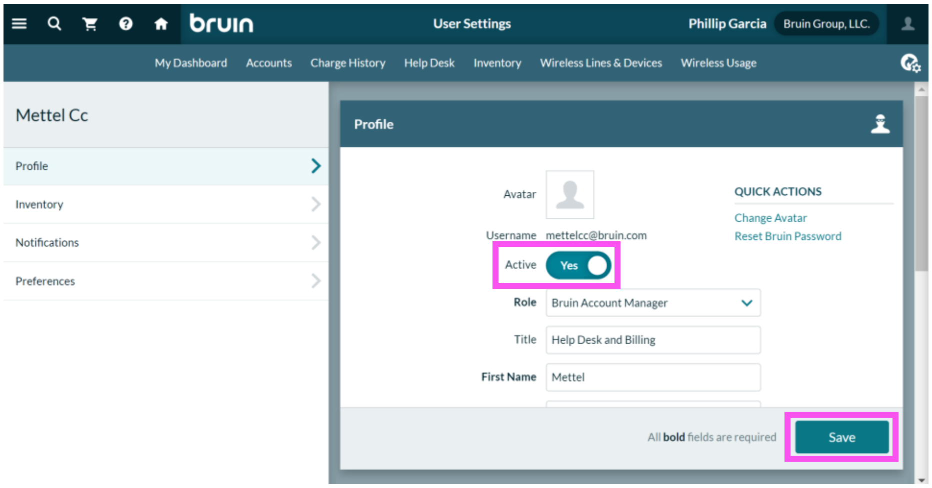


Deactivating a Bruin User

➢ First, use the Users filter in Super Search to find the individual. Type the person's name into the search bar. You will then see something similar to below. Click **info**. Then click **Edit User Info.**



You will then be brought to this page below where all you need to do is **toggle the Active: Yes to No**. Then click **Save** in the bottom right corner. This will deactivate the user. In Bruin we do not delete users, but they can be deactivated.



Next Steps and Help

If you have any questions, comments, or concerns please email your Bruin Account Engineer. We are always happy to help!