

Invite and Manage Admin Accounts

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Invite Admins to the Management Portal and configure them with the appropriate permissions.

Create Admin Roles in Management Portal

Roles are a collection of Privileges granted to Admins. Create your Roles before adding admins because selecting the Role will be a part of the Admin creation process.

Overview

Creating Admin Roles allows your organization to have different types of Admins. For example, you can have an Admin who is only able to invite users, and an administrator who is only able to downloading reports.

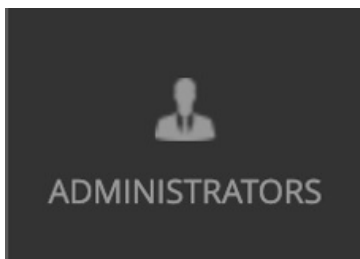
Before you Start

- You need "Roles and Privileges" Privilege in your Role to perform these instructions.


How to create a Role

You can create a role in Administrators > Roles and Privileges.

1. Navigate to the top-most organization that you want to receive the changes. See [Navigating Organizations](https://help.moviuscorp.com/help/navigate-organizations) (<https://help.moviuscorp.com/help/navigate-organizations>).
2. Click **Administrators**.



3. Click **Roles and Privileges**.

Administrator	Roles and Privileges
<input type="text" value="Name / Email"/> <input type="button" value="Q"/>	
<input type="checkbox"/>	Name
<input type="checkbox"/>	 frank w

4. Click **+ Create Role** to create a new role.

Administrator

Roles and Privileges

All available administrator roles for this organization

+ Create Role

<div style="display: flex; align-items: center;"> <div>Enterprise Super Administrator</div> </div>	<div style="display: flex; align-items: center;"> <div>Number Admin 0 administrators assigned</div> <div style="margin-left: auto; display: flex; gap: 5px;"> </div> </div>
<div style="display: flex; align-items: center;"> <div>Invite Amin 0 administrators assigned</div> <div style="margin-left: auto; display: flex; gap: 5px;"> </div> </div>	<div style="display: flex; align-items: center;"> <div>Account manager 0 administrators assigned</div> <div style="margin-left: auto; display: flex; gap: 5px;"> </div> </div>
<div style="display: flex; align-items: center;"> <div>Onboarding Admin 0 administrators assigned</div> <div style="margin-left: auto; display: flex; gap: 5px;"> </div> </div>	

Different privileges can be assigned by checking various features under each section.

1. Enter the name of the role into the **Role Name** field. Note: *When you add admins to the portal, you will assign the role based on the Role Name.*

Administrator

Roles and Privileges

Create A New Role

Role Name *

Name of the role

Dashboard

Accounts

Accounts Bulk Operations

Administrators

API Users

Reports

Setup

Roles and Privileges

Help

Profile

Privileges

Select the checkbox to assign the privileges.

2.

▼ Reports

☐ View

☐ Consumption Metrics

☐ User Metrics

☐ Administrators Activity

☐ Activities

☐ Call Recording

☐ Message Logging

☐ SMS Opt-in

☐ Download

☐ Consumption Metrics

☐ User Metrics

☐ Administrators Activity

☐ Activities

☐ Call Recording

☐ Message Logging

☐ SMS Opt-in

☐ ADK APIs

☐ Call Recording API




☐ Message Logging API

☐ SMS Opt-in

Note: If single or multiple checkboxes of a section are selected, the link for that section will get highlighted in the header link.

Edit Admin Role

1. Click the **pencil** icon to edit an Admin Role.

 Invite Amin
0 administrators assigned  

Your custom Admin Roles are ready!

Now when you [add Admin accounts](https://help.moviuscorp.com/help/invite-administrators-to-management-portal) (https://help.moviuscorp.com/help/invite-administrators-to-management-portal), you'll be able to assign them with the Role you created that only grants them access they need to perform their function in the Management Portal.

What Admin Privileges are in Management Portal?

Read on to learn about Admin privileges in Management Portal.

Overview

When using this help center, you may see instructions that tell you you require a specific "Privilege". Privileges are actions that administrators can perform in the Portal. A Role defines a group of Privileges, see [Create Admin Roles in Management Portal](https://help.moviuscorp.com/help/admins-create-admin-roles) (<https://help.moviuscorp.com/help/admins-create-admin-roles>), and are assigned to administrators when they are added to the Portal.

Below is a table of all the privileges which exist in the Management Portal and their description.

Table of Admin Privileges

Privileges	Description
Accounts	This privilege allows an administrator to View user accounts; Invite new users; Edit and Move, Delete existing accounts, and Filter .
Accounts Bulk Operations	This privilege allows an administrator to Invite, Edit, and Delete multiple user accounts at once based on Filter results.
Administrators	This privilege allows an administrator to View all other Administrators; Create new Administrator IDs; Edit existing information for other Administrators or Delete an existing Administrator ID.
API Users	This privilege allows an administrator to View user accounts; Create new API users; Edit and Delete existing API users.
Reports	<p>This privilege contains three main categories such as View, Download and ADK APIs</p> <p>Options under ADK APIs</p> <ul style="list-style-type: none">• Call recording shows the recorded calls.• Message logging shows the recorded messages.• SMS Opt-In
	<p>Options applicable for View & Download</p> <ul style="list-style-type: none">• Consumption Metrics – are usage charts summarized for that organization.• User Metrics – is a summary of usage across users in that organization.• Administrator Activity – shows the Administrator's activities on the portal.• Activities – are the detailed records (Movius CDRs) around the activity. As this is highly sensitive data, only authorized users should have access to this privilege.• Call recording shows the recorded calls.• Message logging shows the recorded messages.• SMS Opt-In

Privileges	Description
Setup	<p>This section grants the following admin permissions:</p> <p>Edit permissions:</p> <ul style="list-style-type: none"> • Company Profile – Provides Company details. • Invitation Templates – Provides options for SMS and Email Invitation templates. • Manage Alerts – Provides options for the Alerts to Administrators. • Domain Restriction – Provides the ability to restrict invitation access to domains. • Application Version – Provides details about the MultiLine application. • Two Factor Authentication – Provides an additional layer of security to control suspicious login activity. • Webhook Events • Number Management – Provides the options for managing the numbers allocated to an organization. • User Permissions – Provides the ability to define features available on the application. • Feature Settings – Mobile Recording (Call Recording & Message Logging) – Provides options around Mobile Recording. • Messages – Synchronization & Multimedia Messages. • SMS Opt-In – Allows access to the Call and SMS recordings using the ADK. • In-App Messaging • Branding – Portal & Mobile App. <p>View Permissions</p> <ul style="list-style-type: none"> • Company Profile – Provides Company details. • Invitation Templates – Provides options for SMS and Email Invitation templates. • Manage Alerts – Provides options for the Alerts to Administrators. • Domain Restriction – Provides the ability to restrict invitation access to domains. • Application Version – Provides details about the MultiLine application. • Two Factor Authentication – Provides an additional layer of security to control suspicious login activity. • Webhook Events • Number Management – Provides the options for managing the numbers allocated to an organization. • User Permissions – Provides the ability to define features available on the application. • Feature Settings – Manage Recording (Call Recording & Message Logging) - Provides options around Mobile Recording. • Messages – Synchronization & Multimedia Messages. • SMS Opt-In - Allows access to the Call and SMS recordings using the ADK. • In-App Messaging

Privileges	Description
Roles and Privileges	<p>This section grants the following admin permissions:</p> <ul style="list-style-type: none">• View all the roles;• Create a new role;• Edit an existing role;• Delete an existing role.
Help	<p>This grants permissions to admins to View or Edit contents in the Help section.</p>
Profile	<p>This section grants the following admin permissions:</p> <ul style="list-style-type: none">• View Administration Profiles and Sub-Organizations• Edit Administration Profiles and Sub-Organizations• Create Sub-Organization• Delete Sub-\Organizations

Invite Admins to Management Portal

Learn how to add, delete or edit an admin profile in the Administrator section of Management Portal.

Overview

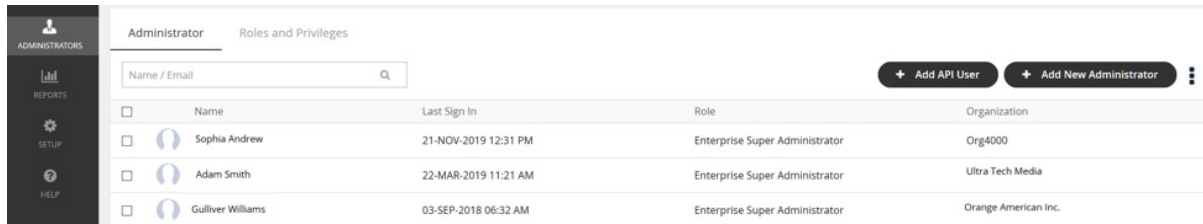
Admin accounts allows people in your organization to access the Management Portal.

Before you Start

- Requires Roles and Privileges Role. See [Admin Roles \(https://help.moviuscorp.com/help/what-admin-roles-mmp/\)](https://help.moviuscorp.com/help/what-admin-roles-mmp/) for more information.
- Before you invite administrators to the organization, you should have already [created Roles for the administrators \(https://help.moviuscorp.com/help/admins-create-admin-roles/\)](https://help.moviuscorp.com/help/admins-create-admin-roles/).

Invite admins

1. [Go to the organization \(https://help.moviuscorp.com/help/navigate-organizations/\)](https://help.moviuscorp.com/help/navigate-organizations/) where you want to perform the action.
2. Click **Administrator**.
3. Click **Add New Administrator**.

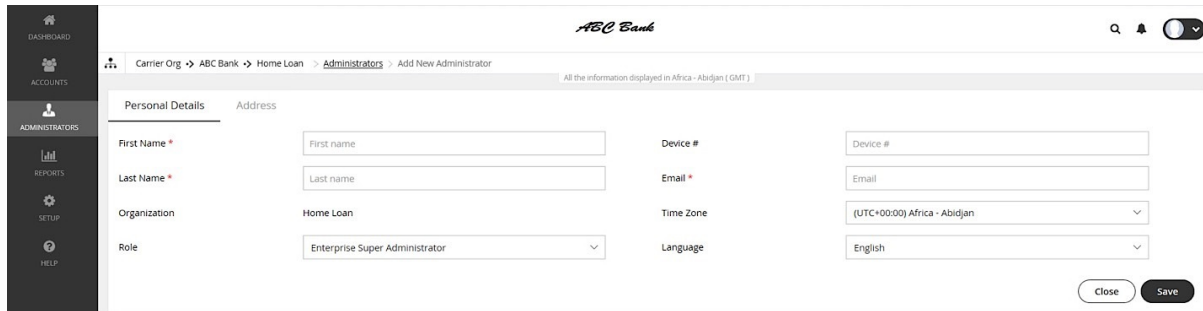


Administrator		Roles and Privileges	
Name / Email			
<input type="checkbox"/>	Name	Last Sign In	Role
<input type="checkbox"/>	Sophia Andrew	21-NOV-2019 12:31 PM	Enterprise Super Administrator
<input type="checkbox"/>	Adam Smith	22-MAR-2019 11:21 AM	Enterprise Super Administrator
<input type="checkbox"/>	Gulliver Williams	03-SEP-2018 06:32 AM	Enterprise Super Administrator
			Organization
			Org4000
			Ultra Tech Media
			Orange American Inc.

4. Enter the details for a new administrator.

- Note that the default language is English but can be modified by the administrator when they review their own profile. Movius currently supports English, Spanish, and Portuguese languages.

5. Click **Save**.



You've invited the admins!

An email will be sent to the new admins which will contain their login credentials and a system-generated password. On the first login, the administrator will be prompted to set their own password.

If you want to check whether administrators have onboarded, you can monitor administrator status in Administrator Reports (see [Managing reports on MultiLine Admins](https://help.moviuscorp.com/help/managing-reports-on-multiline-admins) (<https://help.moviuscorp.com/help/managing-reports-on-multiline-admins>)).

Add API user

Read on to learn how to add an API user to integrate MultiLine into external applications.

Overview

To create a connection from MultiLine to an external application, you will create an **API User**. Once added, the API user will receive an email with their username and password that they can use for consuming the API.

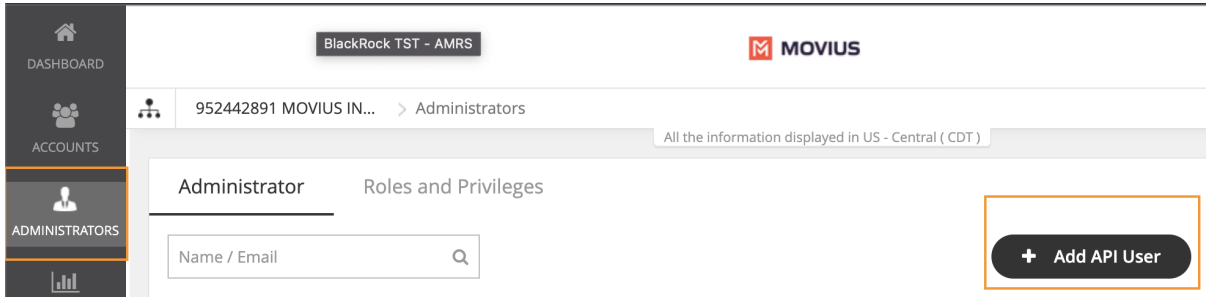
Before you Start

- You need the "**API User**" Privilege in your Role to do this instruction. See [What Admin Privileges are in Management Portal?](https://help.moviuscorp.com/help/what-admin-roles-mmp) (<https://help.moviuscorp.com/help/what-admin-roles-mmp>).

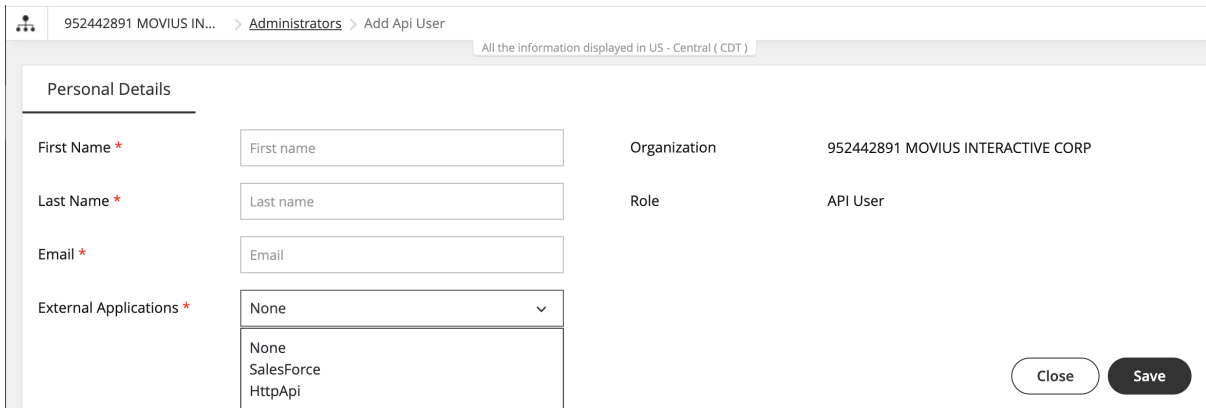
Create an API user

You add an **API User** in the **Administrators** tool.

1. Go to **Administrators**, then select **Add API User**.



2. Enter the required **Personal Details** including **First Name**, **Last Name**, and **Email** of the API administrator.

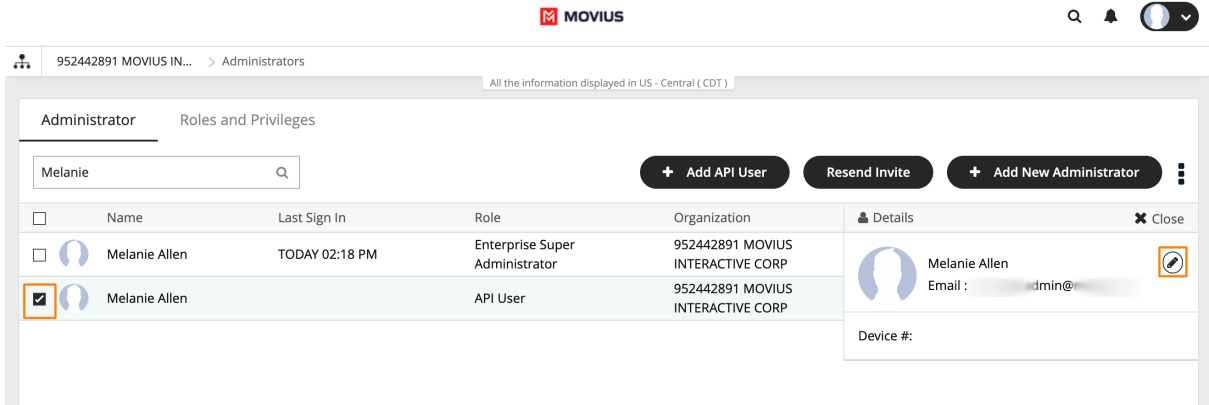


3. Select **External Applications** for which the API user will be accessing the organization data.
 - **HttpApi**: Used for setting up the connection to any external app.
 - **Salesforce**: Used for setting up the connection to the MultiLine for Salesforce App.
 - *Note: you must select Salesforce to create a connection to MultiLine for Salesforce. Selecting HttpApi will not work.*
 - *Note: If your company has created a specific custom app with Movius, select the name of the custom app from the list.*
4. Select **Save**. The user will receive an email with their username and password.

Editing an API user

You can edit the **API User** in the Administrators tool.

1. Go to **Administrators**.
2. Select the checkbox for **API User**, then select the **Edit** pencil.




952442891 MOVIUS IN... > Administrators

All the information displayed in US - Central (CDT)

Administrator Roles and Privileges

Melanie

+ Add API User Resend Invite + Add New Administrator

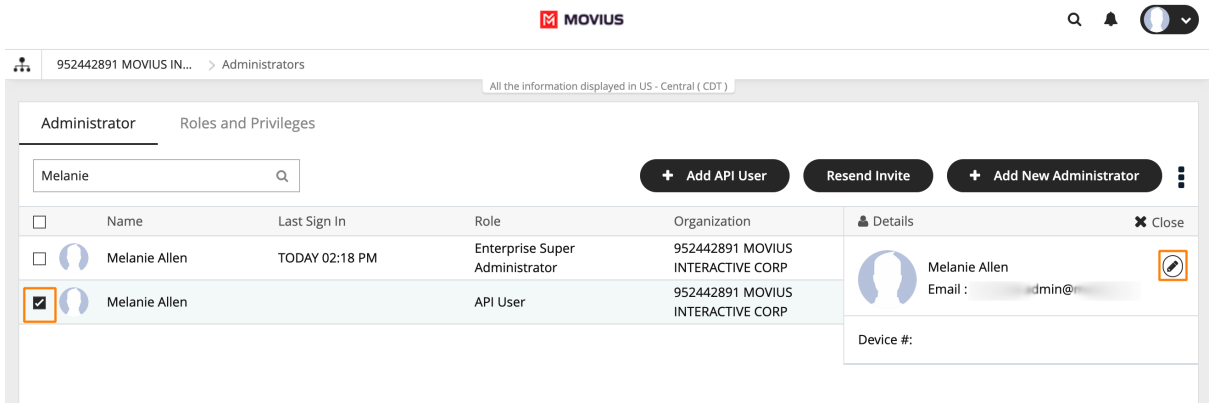
<input type="checkbox"/>	Name	Last Sign In	Role	Organization	Details	Close
<input type="checkbox"/>	Melanie Allen	TODAY 02:18 PM	Enterprise Super Administrator	952442891 MOVIUS INTERACTIVE CORP		
<input checked="" type="checkbox"/>	Melanie Allen		API User	952442891 MOVIUS INTERACTIVE CORP	 Melanie Allen Email : admin@ Device #:	

3. Edit as necessary any required **Personal Details** or **External Applications**.
4. Click **Save**.

Delete an API User

You can delete the API User. This will remove their ability to consume the API.

1. Go to **Administrators**.
2. Select the checkbox for **API User**, then select the **Edit** pencil.




952442891 MOVIUS IN... > Administrators

All the information displayed in US - Central (CDT)

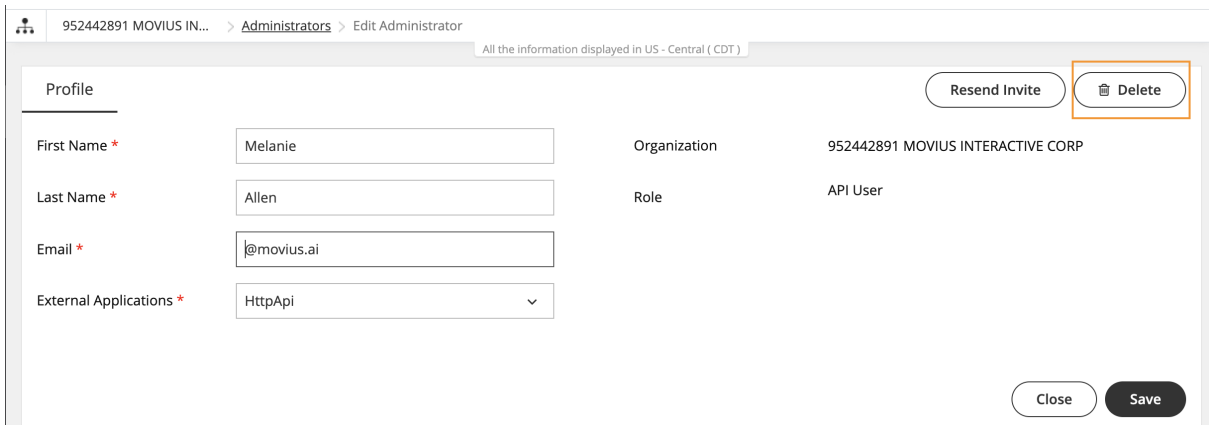
Administrator Roles and Privileges

Melanie

+ Add API User Resend Invite + Add New Administrator

<input type="checkbox"/>	Name	Last Sign In	Role	Organization	Details	Close
<input type="checkbox"/>	Melanie Allen	TODAY 02:18 PM	Enterprise Super Administrator	952442891 MOVIUS INTERACTIVE CORP		
<input checked="" type="checkbox"/>	Melanie Allen		API User	952442891 MOVIUS INTERACTIVE CORP	 Melanie Allen Email : admin@ Device #:	

3. Select **Delete**.



952442891 MOVIUS IN... > Administrators > Edit Administrator

All the information displayed in US - Central (CDT)

Profile

Resend Invite Delete

First Name * Melanie

Last Name * Allen

Email * @movius.ai

External Applications * HttpApi

Organization 952442891 MOVIUS INTERACTIVE CORP

Role API User

Close Save

4. Select **Yes** from the **Confirm** prompt. **Heed the warning: if you delete your only API User for an external application (such as Salesforce), the integration will stop working after the deletion.**

Confirm

'Melanie Allen' is used to connect to 'HttpApi '. If you delete this user, the integration with 'HttpApi ' will fail.

Are you sure you want to delete?

No

Yes

Resend invitations to Management Portal Admins

If an administrator loses their invitation to the Management Portal, you can resend the invitation.

Overview

Invitations to administrators contain the information they need to activate their account into the Management Portal for the first time.

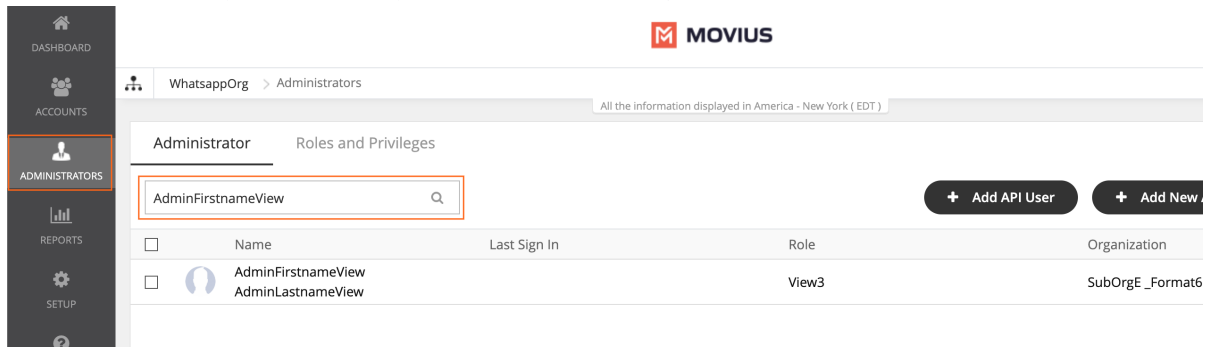
Before You Start

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An admin must have "Administrators" Privilege in their Role in the organization to do these instructions. See [What Admin Privileges are in Management Portal?](https://help.moviuscorp.com/help/what-admin-roles-mmp/) (<https://help.moviuscorp.com/help/what-admin-roles-mmp/>).

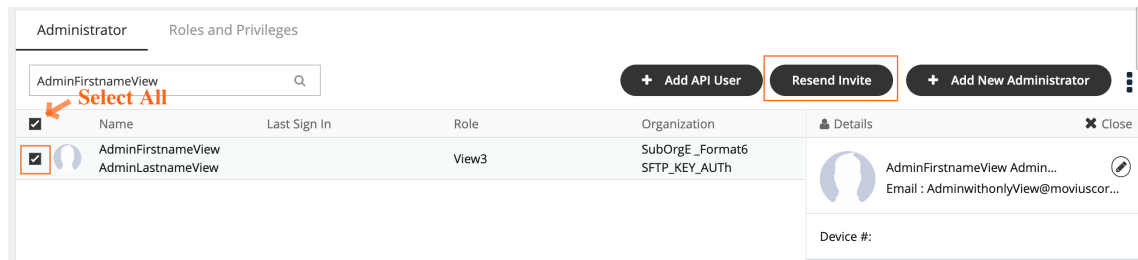
How to resend invite to one or more administrators

1. Go to **Administrators**.
2. If desired, narrow your search by name or email using the search bar.



Administrator	Roles and Privileges
<input type="checkbox"/>	Name
<input type="checkbox"/>	AdminFirstnameView
	AdminLastnameView
	Last Sign In
	Role
	View3
	Organization
	SubOrgE_Format6

3. Select the checkbox for the administrators you want to re-invite.
 - To select all administrators, use the checkbox in the header row.



4. Click **Re-invite**.

After re-inviting administrators, a download link with successful invitation message will appear. Click on the **Download invitation status** link to view the invitation status.

Delete or suspend an Admin account

Read on to learn how to delete or suspend admin accounts.

Overview

Admin accounts provide access to the Management Portal. API admin accounts connect the Management Portal to outside software. You can delete or suspend admin accounts when necessary. This will remove or suspend the ability of the account to access the Management Portal.

Before you Start

- An admin must have "Administrators" Privilege in their Role in the organization to do these instructions. See [What Admin Privileges are in Management Portal?](https://help.moviuscorp.com/help/what-admin-roles-mmp/) (<https://help.moviuscorp.com/help/what-admin-roles-mmp/>).
- Be very careful before deleting API admins. Deleting them will cause the connector to break.

Delete an admin

1. [Go to the organization](https://help.moviuscorp.com/help/navigate-organizations/) (<https://help.moviuscorp.com/help/navigate-organizations/>) where you want to perform the action.
2. Click **Administrators** from the main menu.
3. Select the checkmark for the Admin you want to delete.
4. Click the edit pencil.
5. Click the **Delete** button and confirm.

Suspend an admin

1. [Go to the organization](https://help.moviuscorp.com/help/navigate-organizations/) (<https://help.moviuscorp.com/help/navigate-organizations/>) where you want to perform the action.
2. Click **Administrators** from the main menu.
3. Select the checkmark for the Admin you want to suspend.
4. Click the edit pencil.
5. Select the checkmark for either **Login suspended** or **Account suspended**.

