

Movius for BlackBerry Installation for MultiLine Admins

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Read this guide to learn how to set up your MultiLine organizations in the Management Portal.

In this article:

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- [Part 1: Set up Organization](#)
- [Part 2: Invite Admins](#)
- [Part 3: Invite users](#)
- [Part 4: Manage Users](#)

Note: Click the [Expand](#) → icons below to view the instructions.

Overview

This article is intended for administrators that are overseeing or participating in the initial setup of Management Portal.

Part 1: Set up Organization

Step 1 - Manage organizations

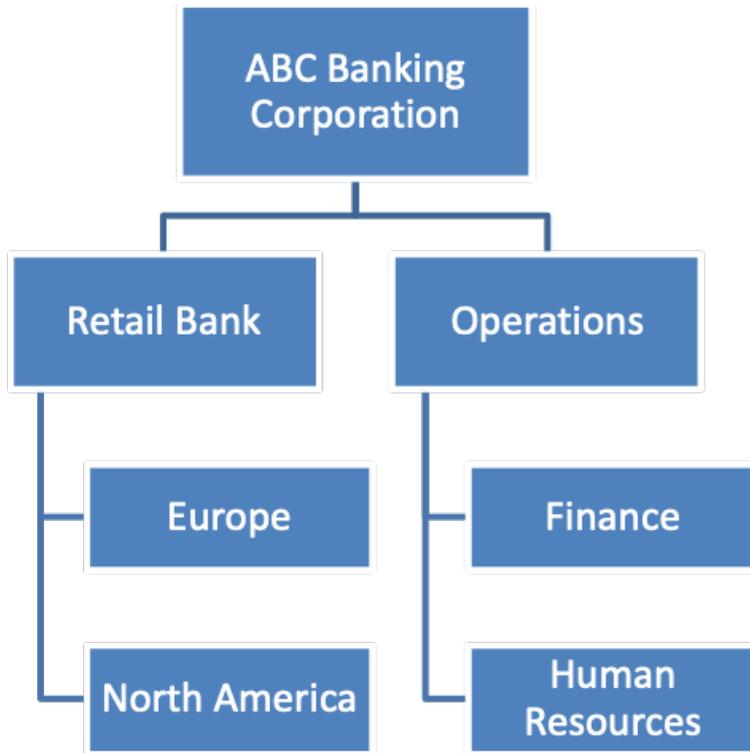
Read on to learn how to create, edit, or delete organizations.

Overview

Organizations contain your user and admin accounts.

You can set up the MMP to reflect your organizational structure where you can create an organization (root node) with the name of your Enterprise. Each node or a branch of the tree represents a department. Each department can have its own administrator with well-defined roles and privileges.

Consider the example below:



You can create one or multiple organizational levels or just create one organizational level below the root node. This structure is flexible enough to manage your employee base.

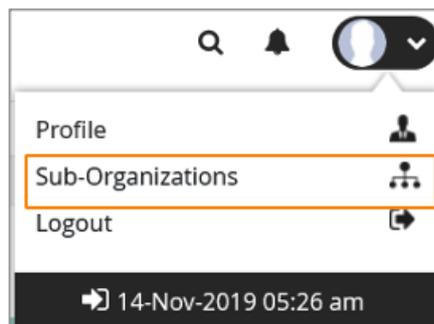
You can have as many organizations and sub-organizations in the portal as needed.

Before you start

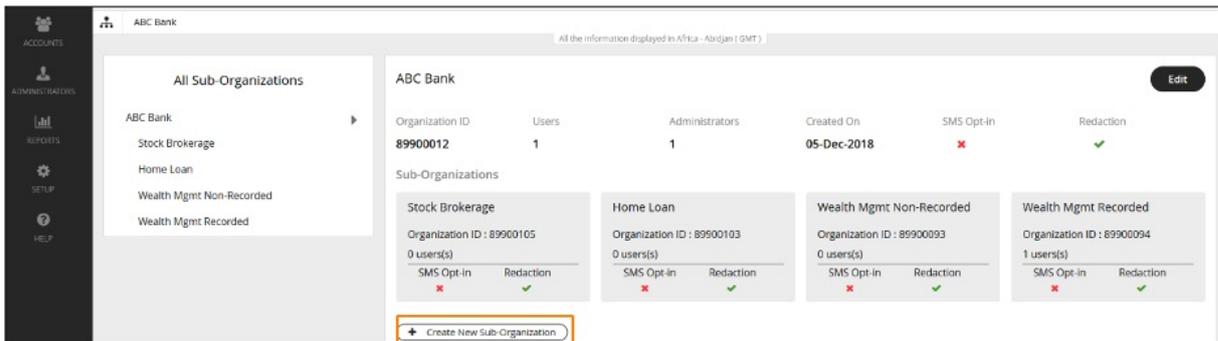
- You need the Profile Role to perform these instructions. See *What Roles are in the Management Portal* (<https://help.moviuscorp.com/help/what-admin-roles-mmp>)?

Create Organization

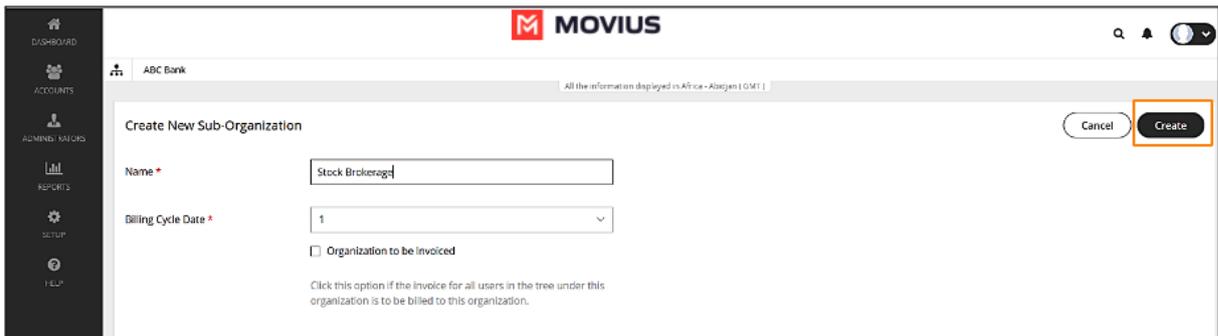
1. Click the profile menu icon  .
2. Click **Sub-Organizations**.



3. Click **Create New Sub-Organization**.

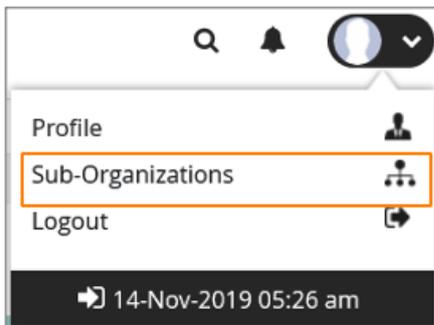


4. Fill out the details and click **Create**.

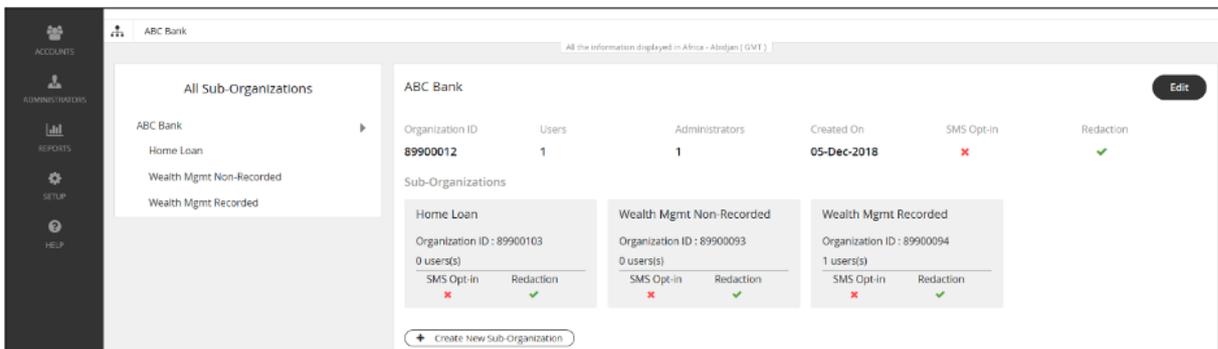


Edit Organization

1. Click .
2. Click **Sub-Organizations**.



3. Click **Edit** to make changes to the parameters within the organization.

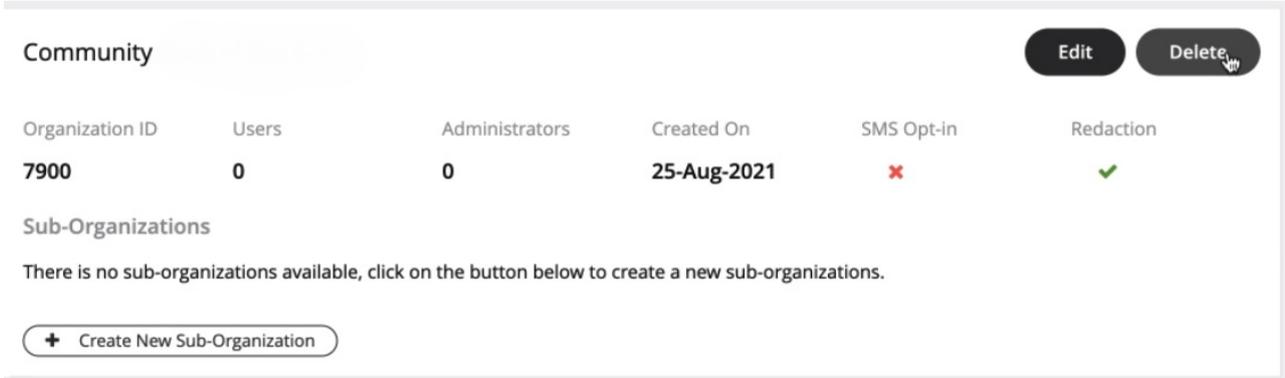


Delete organization

In order to delete an organization, the organization or any of its sub-organizations must not contain any users or administrators.

- [How to delete user](https://help.moviuscorp.com/help/delete-user-and-forward-calls) (https://help.moviuscorp.com/help/delete-user-and-forward-calls)
- [How to move user](https://help.moviuscorp.com/help/move-users) (https://help.moviuscorp.com/help/move-users)

1. Once you have deleted or moved all the users and administrators, the delete button becomes available.



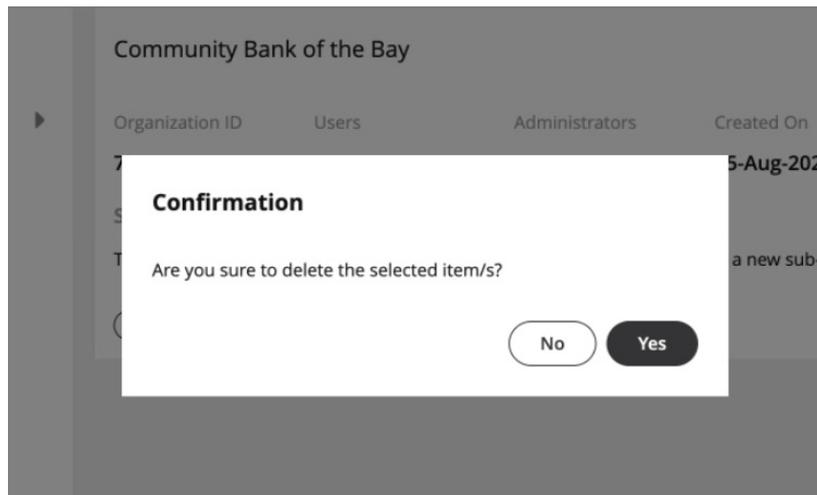
Organization ID	Users	Administrators	Created On	SMS Opt-in	Redaction
7900	0	0	25-Aug-2021	✗	✓

Sub-Organizations

There is no sub-organizations available, click on the button below to create a new sub-organizations.

+ Create New Sub-Organization

2. Click **Yes** to confirm deletion.



Your organizations are ready!

Now administrators can invite administrators and users to the organization.

Step 2 - Customize mobile app

Read on to learn how to add your Enterprise branding to the MultiLine app.

Overview

You can edit your Enterprise's **Mobile App look and feel** under **Branding** in the **Setup** tab. You can customize:

- App Theme: Add logo and branding colors

- About Us screen: Add logo and social accounts
- FAQ screen: Add your own questions and answers with information your MultiLine users may need
- Customer Care screen: Add your IT team's phone number and email address so that user's can get help from you

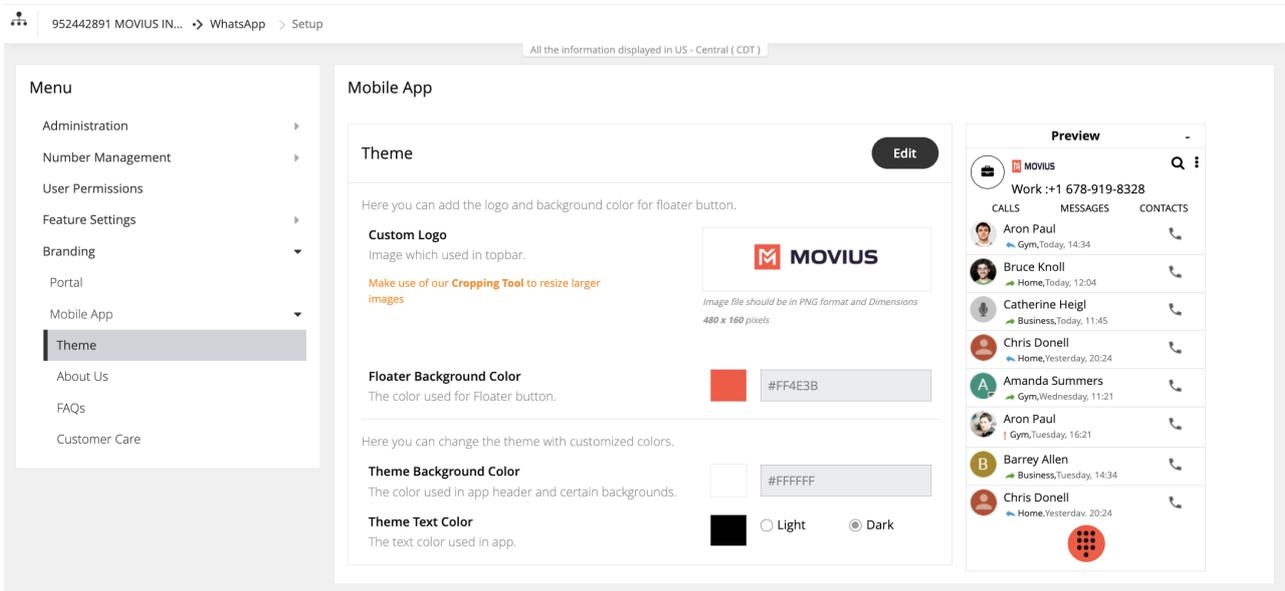
Before you start

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

Customize theme

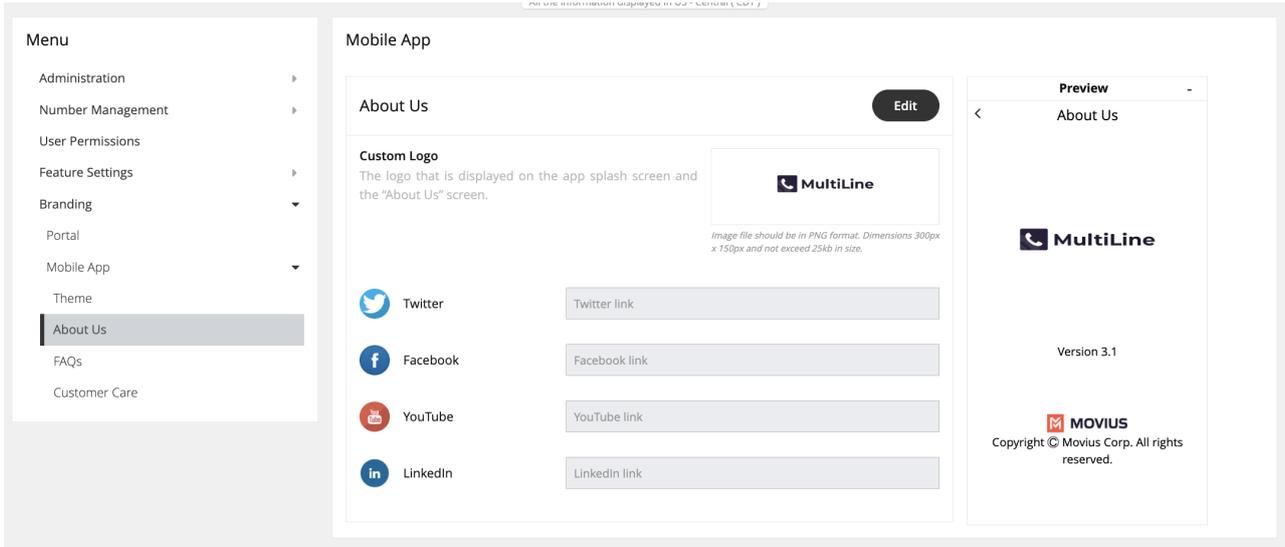
To edit your **Mobile App Theme**, customize the parameters of the following settings:

- Theme Background Color
 - Customizes the background color of the app screens
- Floater Background Color
 - Customizes the background color of the dialpad floater
- Theme Text Color
 - Customizes the color of the text/dialpad floater's 'digits'
- Custom Logo
 - Must be 480 x 160 pixels. If your logo is larger than 480 x 160 pixels, you will be prompted to use the in-app image cropper to fit the logo to size. If you logo is below 480 x 160 pixels, you will be prompted to select a larger image.



Customize About Us screen

To customize your **About Us Page**, edit the parameters of the **About Us** tab under **Branding**.



- Logo must be **300 x 150 pixels**.
- If your logo is larger than **300 x 150 pixels**, you will be prompted to use the in-app image cropper to fit the logo to size.
- If your logo is below **300 x 150 pixels**, you will be prompted to select a larger image.
- File cannot be larger than **25kb**.

Customize FAQ screen

Edit questions or answers

1. Edit the default 'fill-ins' for both the Question, and the Answer fields of the questions you would like to change under the **FAQs** page under **Branding**.
2. Click the **+** icon next to a question to view its respective answer.

Add questions

1. Click the ovalular **ADD** button on the top right.
2. Toggle the **Language** and **Device OS** to identify the fields you want to edit.
You can see a **Preview** of the screen on the right of the MMP.

Mobile App

FAQs Add

Select Language :

Device :

- + 1.
- + 2.
- + 3.
- + 4.
- + 5.
- + 6.

Preview

< **FAQs**

What is my Movius number? ▼

You can see the Movius Number on the main page of the application settings. If you have more than one number allocated, all numbers will be listed there.

Will my call drop if I move outside my Wi-Fi hotspot? ➤

Can I force all calls I make to always use minutes? ➤

Can I force all calls I make to always use data? ➤

Can I force all calls I receive to always use minutes? ➤

Can I force all calls I receive to always use data? ➤

What does the red dot on the top left-hand corner mean? ➤

How do I check my voicemail? ➤

Customize Customer Care screen

To customize your **Customer Care Page**, edit the contact information in the **Customer Care** tab under **Branding**.

Mobile App

Customer Care Edit

Customer Care Phone Number(s)
(Comma seperated)

Customer Care Email Address

Call Progress Brand Text

Preview

< **Customer Care**



+91968637652



moviusticket@moviuscorp.com

Step 3 - Customize invite

Administrators in the Management Portal can customize email invitations. We provide a default email invitation with the required information which you can edit according to the needs of your organization.

Overview

Users receive MultiLine invitations when you add them to an organization. These invitations contain the information users need to download and activate MultiLine and credentials for activating mobile and desktop apps. Some organizations may want to change the default invitation we provide to add their own content or formatting.

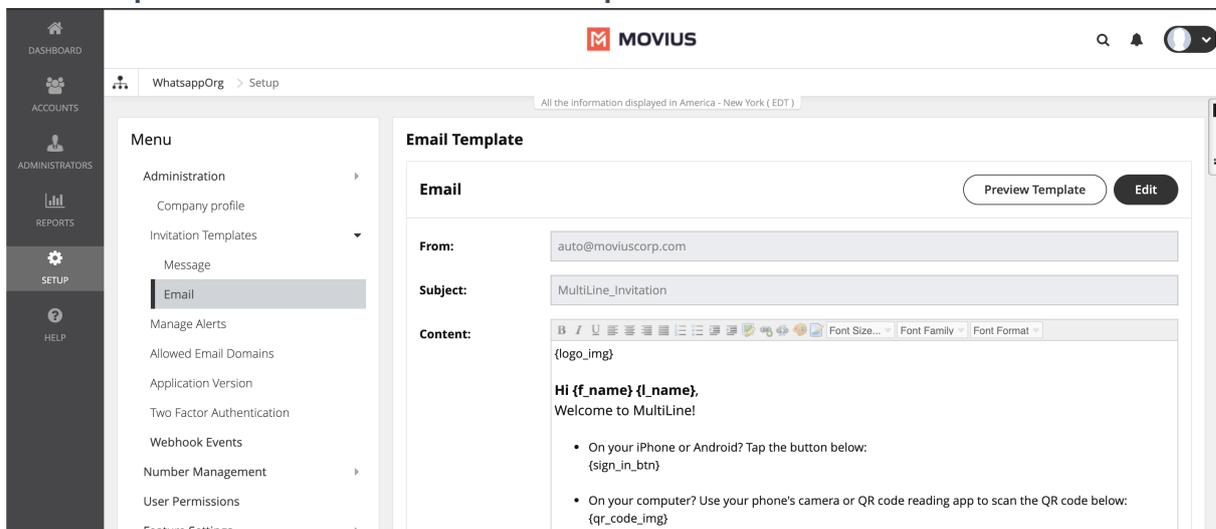
Before you Start

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

How to edit the email invitation template

You can use the editor to add content and formatting to the email.

1. Go to **Setup > Administration > Invitation Templates > Email**



2. Click **Edit** to make changes. *Note: You must include required variables. See below for list of variables.*
3. Click **Preview Template** to see how edits would look and make sure that parameters are working properly.
4. Click **Save**.

Default template

{logo_img}

Hi {f_name} {l_name},
Welcome to MultiLine!

- On your iPhone or Android? Tap the button below:
{sign_in_btn}
- On your computer? Use your phone's camera or QR code reading app to scan the QR code below:
{qr_code_img}
- To manually activate, click this {app_download_link} to download the app and enter the credentials below during onboarding:
Company Id : **{market_code}**
UserName : **{u_name}**
Password : **{pwd}**
- To access **MultiLine Desktop** (<https://help.moviuscorp.com/user-desktop>), click this {web_app_link} and enter the username and password above during onboarding.

Please note that you'll be requested to create a password when signing in to MultiLine Desktop for the first time.

Thanks,
Team Movius

List of invitation variables

Variable Name	Description	Required?
{f_name}	First name of the invited user	No
{l_name}	Last name of the invited user.	No
{app-link}	App link configured by the system administrator. Tapping app link redirects the user to download the app.	No
{qr_code_img}	This is the QR code. Users scan the QR code to automatically download the app (if not already downloaded) and begin activation.	Yes
{sign_in_btn}	This is the "Download and Activate" button. Users tap the button to automatically download the app (if not already downloaded) and begin activation.	No
{u_name}	Email address or mobile number of the invited user.	No
{pwd}	System-generated password for the invited users.	No
{market_code}	Company or Organization ID is automatically defined when the organization is defined.	No

Note: if you do not include {u_name}, {pwd}, and {market_code} variables, your users will not be able to use manual activation.

Tip: Provide help resources to users - It's a good idea to link to our help resources here at <https://help.moviuscorp.com>. Users can also get to help resources within the application in **Settings > Help**.

Your custom MultiLine email invitation is ready!

Any new invitations sent will now have your custom content and formatting.

Part 2: Invite Admins

Step 1 - Create admin roles

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.

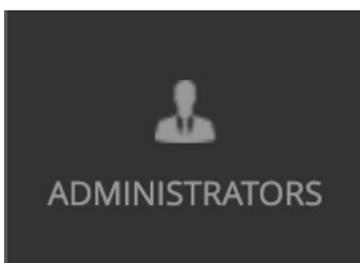
Before you Start

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

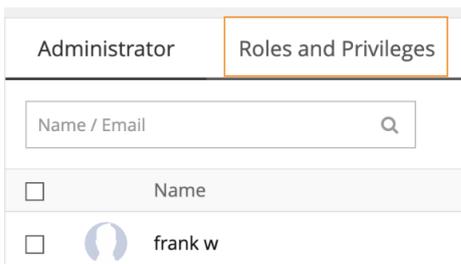
How to create a Role

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**.



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

Administrator Roles and Privileges

All available administrator roles for this organization + Create Role

Enterprise Super Administrator	Number Admin 0 administrators assigned
Invite Amin 0 administrators assigned	Account manager 0 administrators assigned
Onboarding Admin 0 administrators assigned	

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 Cancel Save

Role Name * 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

<input type="checkbox"/> View	<input type="checkbox"/> Download	<input type="checkbox"/> ADK APIs
<input type="checkbox"/> Consumption Metrics	<input type="checkbox"/> Consumption Metrics	<input type="checkbox"/> Call Recording API
<input type="checkbox"/> User Metrics	<input type="checkbox"/> User Metrics	<input type="checkbox"/> Message Logging API
<input type="checkbox"/> Administrators Activity	<input type="checkbox"/> Administrators Activity	<input type="checkbox"/> SMS Opt-in
<input type="checkbox"/> Activities	<input type="checkbox"/> Activities	
<input type="checkbox"/> Call Recording	<input type="checkbox"/> Call Recording	
<input type="checkbox"/> Message Logging	<input type="checkbox"/> Message Logging	
<input type="checkbox"/> SMS Opt-in	<input type="checkbox"/> 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>), 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.

Step 2 - Invite admins

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

Overview

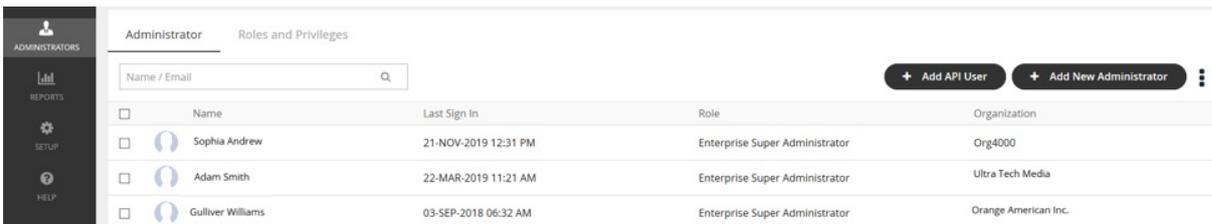
Admin accounts allows people in your organization to access the Management Portal.

Before you Start

- Requires Roles and Privileges Role. See [Admin Roles \(https://help.moviuscorp.com/help/what-admin-roles-mmj\)](https://help.moviuscorp.com/help/what-admin-roles-mmj) 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>).

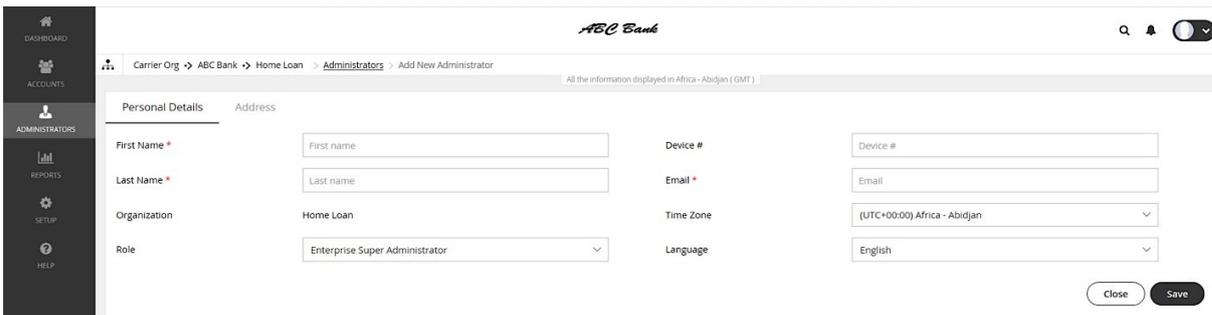
Invite admins

1. **Go to the organization** (<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	Organization
<input type="checkbox"/>	 Sophia Andrew	21-NOV-2019 12:31 PM	Enterprise Super Administrator	Org4000
<input type="checkbox"/>	 Adam Smith	22-MAR-2019 11:21 AM	Enterprise Super Administrator	Ultra Tech Media
<input type="checkbox"/>	 Gulliver Williams	03-SEP-2018 06:32 AM	Enterprise Super Administrator	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**.



ABC Bank

Carrier Org → ABC Bank → Home Loan → Administrators → Add New Administrator

All the information displayed in Africa - Abidjan (GMT)

Personal Details		Address	
First Name *	<input type="text" value="First name"/>	Device #	<input type="text" value="Device #"/>
Last Name *	<input type="text" value="Last name"/>	Email *	<input type="text" value="Email"/>
Organization	Home Loan	Time Zone	(UTC+00:00) Africa - Abidjan
Role	Enterprise Super Administrator	Language	English

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)).

Part 3: Invite users

Step 1 - Create user permissions

Read this to learn how to create custom user permissions that you can apply to Organizations in the **Setup** tab.

Overview

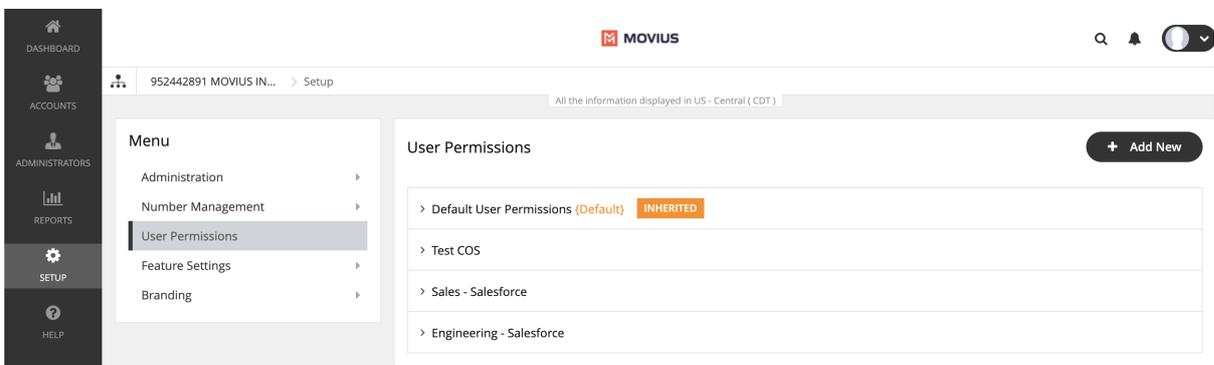
User permissions define what app features are available to users of the MultiLine app. User permissions are set at the organization level and are inherited by any sub-organizations. If your sub-organization has an inherited user permission, you must edit the user permission at the level it was defined.

Before you Start

- An admin must have "Setup" Role in the organization to do these instructions. See [What Admin Roles are in the Management Portal](https://help.moviuscorp.com/help/what-admin-roles-mmp) (<https://help.moviuscorp.com/help/what-admin-roles-mmp>).
- **Default User Permissions** will set permissions for users that are not part of a subgroup.

Create new custom permissions

1. Go to the **organization** (<https://help.moviuscorp.com/help/navigate-organizations>) where you want to perform the action.
2. Go to the **Setup** tab and click **User Permissions**.
3. Click **Add New**.



4. Check the box for a feature to permit it, or uncheck the box for a feature to disallow it.

▼ Default Compliance

Inbound Call Settings <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Data <input checked="" type="checkbox"/> Minutes <input type="checkbox"/> Fall Back 	Outbound Call Settings <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Data <input checked="" type="checkbox"/> Minutes <input checked="" type="checkbox"/> Choose On Dialer 	Contact Sources <ul style="list-style-type: none"> <input type="checkbox"/> Use Native <input type="checkbox"/> Local <input checked="" type="checkbox"/> Exchange 	Personalization <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Use 'MultiLine' As Contact Label
General Settings <ul style="list-style-type: none"> <input type="checkbox"/> Allow Call Forwarding <input checked="" type="checkbox"/> Allow Scheduler <input checked="" type="checkbox"/> Allow "Show Caller ID" <input type="checkbox"/> Allow Simultaneous / Sequential Ring <input checked="" type="checkbox"/> Allow Advanced Wi-Fi Setting <input checked="" type="checkbox"/> Allow Block Caller <input checked="" type="checkbox"/> Allow SMS 	Visual Voicemail <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Allow Spoken Name Recording <input checked="" type="checkbox"/> Allow Custom Greeting Recording 	Onboarding <ul style="list-style-type: none"> <input type="checkbox"/> Enable E-Mail PIN 	

🗑️ Delete ✎ Edit

List of permissions

Inbound Call Settings

- Data: Enable/Disable using data to receive inbound calls.
- Minutes: Enable/Disable using minutes to receive inbound calls.
- Fall back: Enable/Disable trying data first, then minutes, to receive inbound calls.

Outbound Call Settings

- Data: Enable/Disable using data to make outbound calls.
- Minutes: Enable/Disable using minutes to make outbound calls.
- Choose on Dialer: Enable/Disable choosing data or minutes from the dialer when making outbound calls.

Contact Sources

- **Use Native: Enable/Disable using native contacts service in MultiLine.**
- Local: Enable/Disable importing native contacts into MultiLine.
- Exchange: Enable/Disable exchanging contacts between native device and MultiLine server.

Personalization

- Allow Personalize Number: Enable/Disable the ability to customize MultiLine number.
- Use 'MultiLine' as Contact Label: Enable/Disable the ability to label a Contact number with "MultiLine".

General Settings

- Allow Call Scheduler: Enable/Disable call scheduler function.

- Allow Scheduler: Enable/Disable scheduler function.
- Allow "Show Caller ID": Enable/Disable caller ID function.
- Allow Simultaneous/Sequential Ring: Enable/Disable simultaneous/sequential ring function.
- Allow Advanced WiFi Setting: Enable/Disable toggling of the Advanced Wifi settings.
- Allow Block Caller: Enable/Disable incoming caller blocking function.
- Allow SMS: Enable/Disable SMS messaging.

Visual Voicemail

- Allow Spoken Name Recording: Enable/Disable spoken-name voicemail greetings.
- Allow Custom Greeting Recording: Enable/Disable custom, personable voicemail greetings.

Onboarding

- Enable Email PIN: Enable/Disable sending the onboarding OTP PIN via email in addition to SMS.

You've created your custom permission

You can assign the permission set when you **add users** (<https://help.moviuscorp.com/help/send-multiline-invitations-add-users>).

Step 2 - Add users

Learn how to add users and send them invitations that they use to activate their MultiLine service.

Overview

To grant users access to multiLine MultiLine invitations contain user credentials and a password to use for MultiLine activation. Users must activate MultiLine on their device every time they install or reinstall the application. If users lose their invitation, you'll need to send them a new password. See *Getting Started with MultiLine* (<https://help.moviuscorp.com/help/getting-started-with-multiline>) for the user experience.

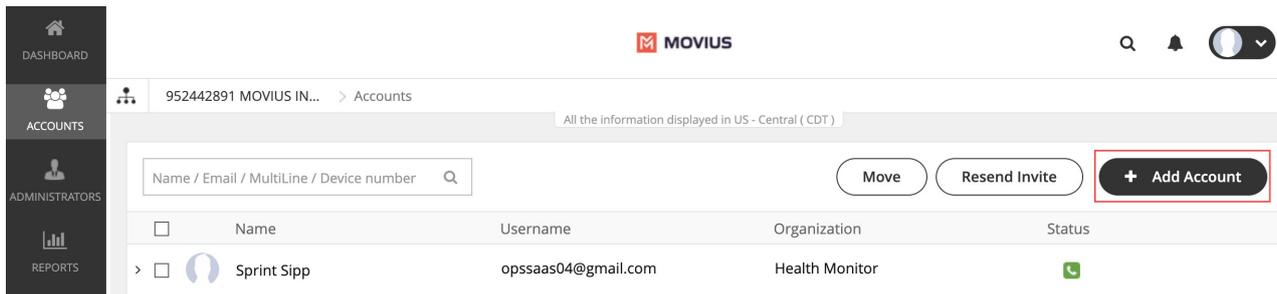
You can add users directly in the portal, or you can upload multiple users at once using a CSV file. You can also add users and invite them to MultiLine immediately or save the information to invite them at a later time.

Before you Start

- An admin must have "Accounts" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal* (<https://help.moviuscorp.com/help/what-admin-roles-mmp>).
- If you would like to **customize the email invitation** (<https://help.moviuscorp.com/help/customize-email-invitations>), you should do this prior to this step.
- If your users need **custom permissions** (<https://help.moviuscorp.com/help/set-user-permissions>), you should create those prior to this step.
- Sending an invitation requires there to be an Available or Reserved number to be assigned to the user account.

Send invitation

From Accounts, you can add accounts individually, or upload multiple accounts using a CSV file. Either way, first go to the **Accounts** tab, and then click **Add Account**.



Add a single account

You can add a single user directly in the portal by using this procedure.

SINGLE ACCOUNT
MULTIPLE ACCOUNTS

Add a single account or to import and/or invite users in bulk, please go to the 'Multiple accounts' tab

First name*	<input type="text" value="Test"/>	User options	<input type="text" value="default cos for org 2000 (Default)"/>
Last name*	<input type="text" value="User"/>	Application(s)*	MultiLine
Organization	Movius Employees	Number of lines allowed	<input type="text" value="1"/> Assign number
Email or Device # *	<input type="text" value="test.user@moviuscorp.com"/>	MultiLine	<input type="text" value="default cos for org 2000 (Default)"/> <input type="text" value="p"/> <div style="border: 1px solid gray; padding: 2px; display: inline-block;"> PORTED 447450347127 </div> <input type="button" value="Invite"/>

1. Enter the **First Name** and **Last Name**.
2. Enter the **Email** or **Device #** that the invitation will be sent to.
3. Click the **Assign Number** link.
4. Choose a number or tag from the drop-down menu. (Example above: "PORTED")
5. Select the **User Permissions** to which to assign this number. (Example above: "default cos for org 2000")
6. You can choose to invite the user immediately or to invite at a later time.
 1. Click **Save** button, and you can invite the user at a later time.
 2. Click the **Save and Invite** button, and you have invited a user.

DISCLAIMER: By clicking on Invite, you agree that you have obtained permission from recipients to receive SMS notifications through employee or other agreement. Message and data rates may apply.

Note: Only Email Invitees can onboard onto the MultiLine Desktop

Note that the available fields on this screen will vary based on your organization's setup.

Add multiple accounts

You can add multiple accounts at once by uploading a CSV file using this procedure.

952442891 MOVIUS IN... > **Accounts** > Add Account

All the information displayed in US - Central (CDT)

SINGLE ACCOUNT **MULTIPLE ACCOUNTS**

To import and/or invite users in bulk, please use this [CSV template](#) to upload the users
 Select the Organization for which the users are to be imported and/or invited. You can directly invite the imported users or you can import them and invite them later.

Choose Organization: 952442891 MOVIUS INTERACTIVE CORP Application(s) *: MultiLine User Permissions: Default User Permissions (Default) Choose CSV File: Upload Upload CSV File

*By clicking on Import & Invite, you agree that you have obtained permission from recipients to receive SMS notifications through employee or other agreement. Message and data rates may apply.

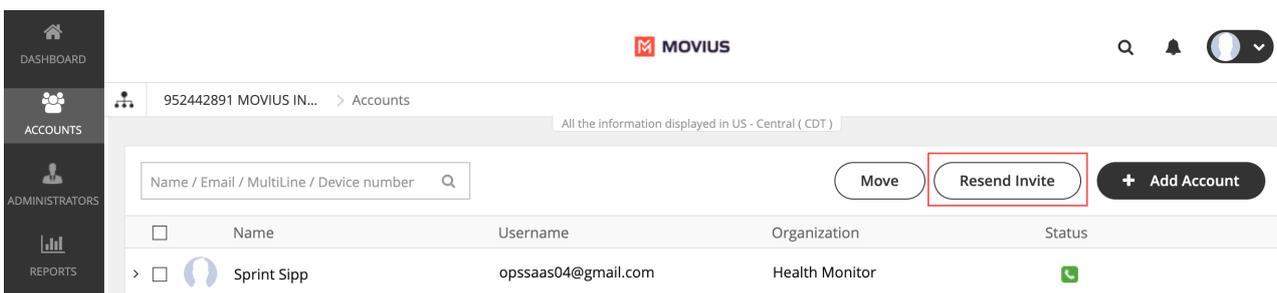
Cancel **Import** **Import & Invite**

1. Click the **Multiple Accounts** tab.
2. Download the **.CSV template** and paste in your users. You can copy/paste from an Excel document.
3. Choose the **sub-organization** that you want these users to be added to.
4. Choose the **User Permissions** group for this upload.
5. Upload the CSV and click **Import and Invite**. This will trigger the invitation to all the users in the CSV. *Note: This will not assign numbers to each user. They will have the option to choose the number themselves, when they onboard onto the application.*

The CSV template currently includes an optional new field "restrict_incoming_social_messaging" that currently is ignored. This field will be used in a future release when Incoming Message Routing for social messaging is enabled.

Resend invitation

1. Select the checkbox next to the User **Name**.
2. Click **Resend Invite**.



952442891 MOVIUS IN... > **Accounts**

All the information displayed in US - Central (CDT)

Name / Email / MultiLine / Device number **Move** **Resend Invite** **+ Add Account**

<input type="checkbox"/>	Name	Username	Organization	Status
<input type="checkbox"/>	Sprint Sipp	opssaas04@gmail.com	Health Monitor	

- The **Resend Invite** button stays active both in the **Accounts** as well as the **Administrator** pages, irrespective of whether the numbers are available or not.
- Moving the pending invitations from one organization to another will not be allowed if the destination organization does not have enough numbers to onboard.
- If a pending invite (without an assigned number) is moved from one organization to another, and if the destination organization does not have enough numbers available then the **Move** button gets disabled. On selecting the destination organization an error message "Unable to move account(s). You do not have enough numbers available in the selected

organization" appears on mouse hover.

Invitation FAQ

Can I assign a number to a specific user?

Yes. Individual numbers can be assigned to a specific person. This is typically needed when numbers are ported or when you need to re-assign a previously used number to a new user.

Can I bulk assign users with specific numbers?

No. At this time, it is not possible to assign a specific number to a user if you use the bulk invitation feature.

Can I resend an invitation if a user did not receive the email?

Yes. Invitations can be resent to any user. Simply find the user in the Accounts tab of the Portal and click the "Send Invite" button.

How can I tell if a user has used their invitation?

[Track Invitation status](https://help.moviuscorp.com/help/tracking-onboarding) (<https://help.moviuscorp.com/help/tracking-onboarding>) in the Accounts tab.

What do I do if I invite a user to the wrong organization?

[Move the user](https://help.moviuscorp.com/help/move-users) (<https://help.moviuscorp.com/help/move-users>) to the desired organization.

What do I do if a user has changed their personal phone number (new device or SIM card)?

When users activate MultiLine, their accounts are associated with their personal phone number. If the user wants to keep the same MultiLine number, [delete the user's current account](https://help.moviuscorp.com/help/delete-user-and-forward-calls) (<https://help.moviuscorp.com/help/delete-user-and-forward-calls>) and send a new invitation to the user.

Part 4: Manage Users

Search users and view Invitation status

Move users

Delete Users

