

Organizations

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Understanding the organizational structure for managing users in Management Portal.

Manage (Add, Edit, or Delete) Organizations

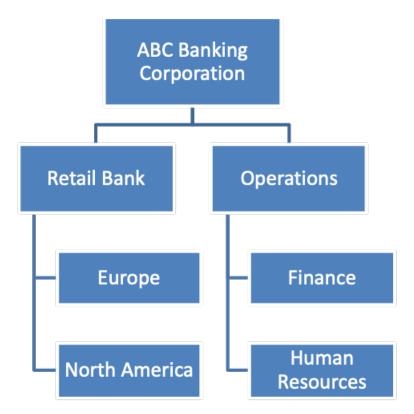
Read on to learn how to create, edit, or delete organizations.

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 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.



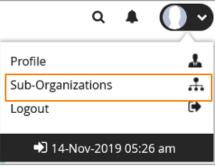
Before you start

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

Create Organization

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





3. Click Create New Sub-Organization.

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ACCOUNTS	12			All the I	iformation displayed in Afri	ca - Abidjan (GMT)				
ADMINISTRATORS	All Sub-Organizations		ABC Bank							Edit
Latel	ABC Bank	F.	Organization ID	Users	Adm	inistrators	Created On	SMS Opt-in	Reda	ction
REPORTS	Stock Brokerage		89900012	1	1		05-Dec-2018	×	~	
¢	Home Loan		Sub-Organization	IS						
SETUP	Wealth Mgmt Non-Recorded		Stock Brokerage		Home Loan		Wealth Mgmt N	on-Recorded	Wealth Mgmt R	ecorded
0	Wealth Mgmt Recorded		Organization ID ::		Organization ID :	20000103	Organization ID ::		Organization ID :	
HELP			0 users(s)	59900105	O users(s)	. 63300103	0 users(s)	5550035	1 users(s)	63300034
			SMS Opt-in	Redaction	SMS Opt-in	Redaction	SMS Opt-in	Redaction	SMS Opt-in	Redaction
			+ Create New Su	b-Organization						

4. Fill out the details and click Create.

🖨 Dashboard					۹	• (
ACCOUNTS	#	ABC Bank	All the information displayed is Africa - Abicjun (SMT)				
	¢	Create New Sub-Organization		Cance		Crea	ate
LIII REPORTS	N	lame *	Stock Brokerage				
¢ setur	e	illing Cycle Date *	1 ~				
O HELP			Organization to be invoiced Click this option if the invoice for all users in the tree under this organization is to be billed to this organization.				

Edit Organization

- 1. Click 🕖 🗸
- 2. Click Sub-Organizations.



۹ 🔺 🚺	
Profile	*
Sub-Organizations	*
Logout	•
🖈 14-Nov-2019 05:26 am	

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

	ABC Bank			All the in	formation displayed in Afric	a - Abidjan (GMT)			
	All Sub-Organizations		ABC Bank						Edit
Last.	ABC Bank	•	Organization ID	Users	Admi	nistrators	Created On	SMS Opt-In	Redaction
	Home Loan		89900012	1	1		05-Dec-2018	×	×
	Wealth Mgmt Non-Recorded		Sub-Organization	s					
	Wealth Mgmt Recorded								
e Help			Home Loan Organization ID : 1 0 users(s)	89900103	Wealth Mgmt N Organization ID : 0 users(s)		Wealth Mgmt F Organization ID : 1 users(s)		
			SMS Opt-in	Redaction	SMS Opt-in	Redaction	SMS Opt-in	Redaction	
			+ Create New Su	b-Organization					

Delete organization

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

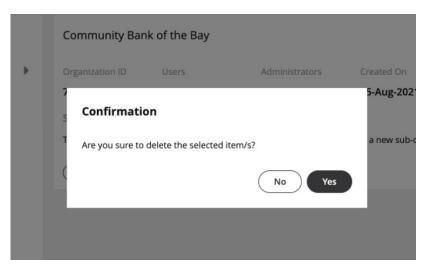
- How to delete user (https://help.moviuscorp.com/help/delete-user-and-forward-calls)
- How to move user (https://help.moviuscorp.com/help/move-users)

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

Community					Edit Delete
Organization ID	Users	Administrators	Created On	SMS Opt-in	Redaction
7900	0	0	25-Aug-2021	×	~
Sub-Organizations					
There is no sub-organ	izations available, clio	k on the button below to	create a new sub-organi	zations.	
+ Create New Sub-	Organization				

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





Your organizations are ready!

Now administrators can invite administrators and users to the organization.

Navigate Organizations

Read on to learn how to go to an organization in the Management Portal.

Overview

Before you perform most tasks, if you manage multiple organizations, you will need to go to the correct organization before beginning.

Before you start

- Best practice is to set policies at the top-most level where they apply, as policies set at the top-level are inherited by the organizations below.
- You can only go to organizations you have access to.
- If you only have access to one organization, you won't need to use this instruction.

Go to organization

- 1. Click the organization icon + on the left side of the header bar.
- 2. Select sub-organizations to reveal their sub-organizations until you find the desired suborganization.

All Sub-Organization	Choose Sub-Org	ganizations					
BC Sank Shock Rockerage Home Loan Weath Ngers Non-Recorded Weath Ngers Recorded	ADC Bard Stock Brokwags Health Mgnit Reco	Home Loan	Wealth Mgritt Nor	n-Recorded		Cancel A	MES Ope on X rided
	G	SMS Opt-In H Create how S	Reduction v	sus oprix R	Reduction	SMS Opera M	Reduction V

3. Click Apply.

