

MultiLine for Intune Installation guide 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:

- Overview
- 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.

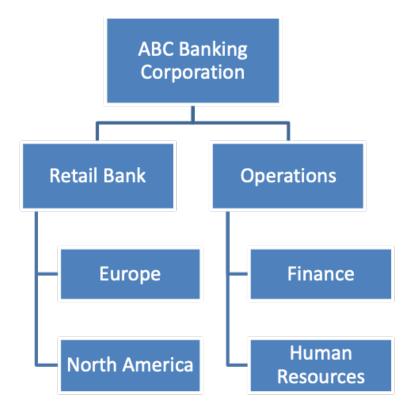
Overview

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

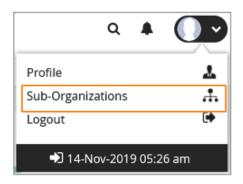
• You need the Profile Role to perform these instructions. See What Roles are in the ${\it Management Portal (https://help.moviuscorp.com/help/what-admin-roles-mmp)?}$

Create Organization

1. Click the profile menu icon ().

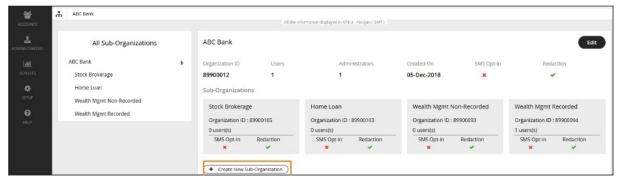


2. Click Sub-Organizations.



3. Click Create New Sub-Organization.



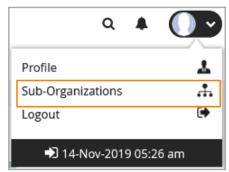


4. Fill out the details and click Create.



Edit Organization

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



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

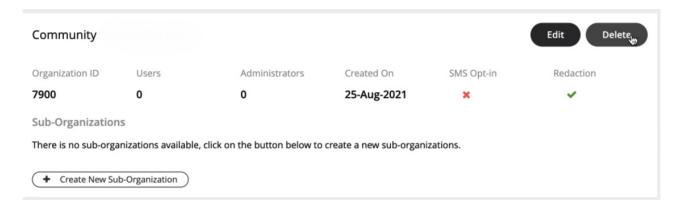


Delete organization

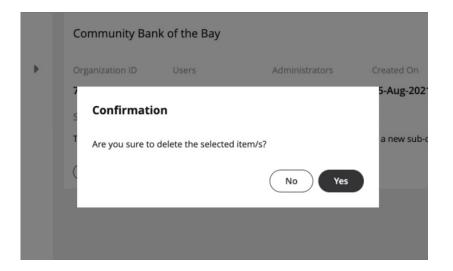
In order to delete an organization, the organization or any of its sub-organizations must not contain any users or administrators.



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



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

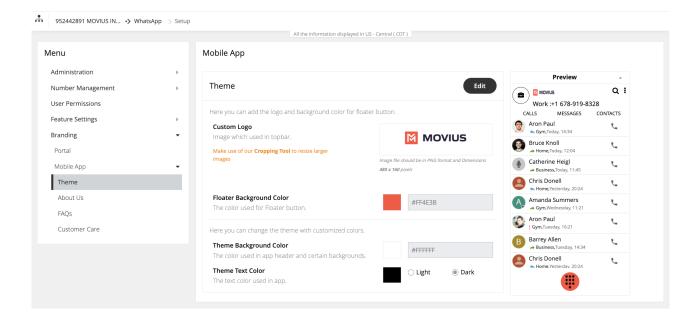
Before you start

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).

Customize theme

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

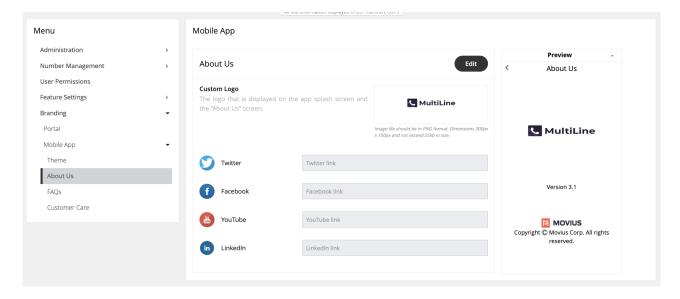
- Theme Background Color
 - Customizes the background color of the app screens
- Floater Background Color
 - Customizes the background color of the dialpad floater
- Theme Text Color
 - Customizes the color of the text/dialpad floater's 'digits'
- Custom Logo
 - Must be 480 x 160 pixels. If your logo 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 you 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

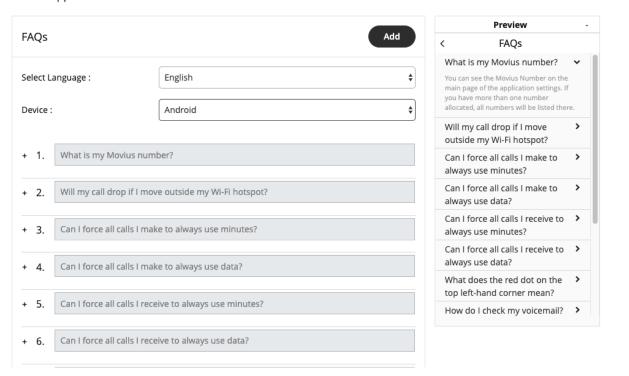
- 1. Edit the default 'fill-ins' for both the Question, and the Answer fields of the questions you would like to change under the **FAQs** page under **Branding**.
- 2. Click the + icon next to a question to view its respective answer.

Add questions

- 1. Click the ovular 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.



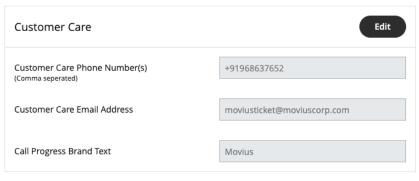
Mobile App



Customize Customer Care screen

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

Mobile App







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.

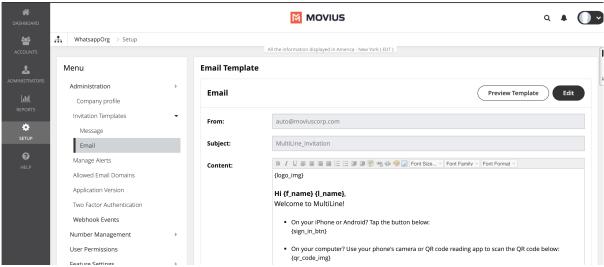
Before you Start

• 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).

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 Organiation ID is automatically defined when the organization is defined.	

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.

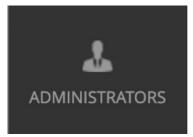
Before you Start

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

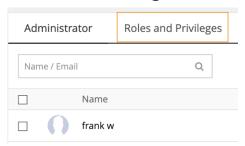
How to create a Role

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).
- 2. Click Administrators.

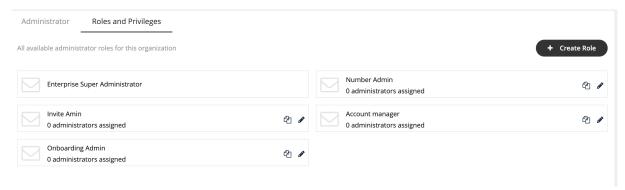


3. Click Roles and Privileges.



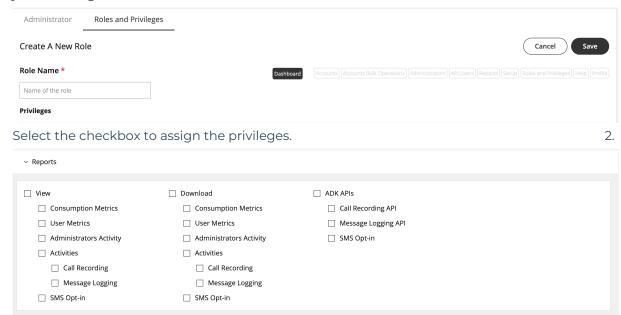
4. Click + Create Role to create a new role.





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

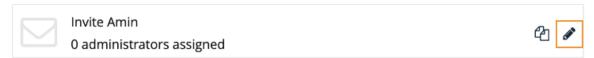
1. Enter the name of the role into the **Role Name** field. *Note: When you add admins to the portal, you will assign the role based on the Role Name.*



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.



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 Managment Portal.

Step 2 - Invite admins



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

Overview

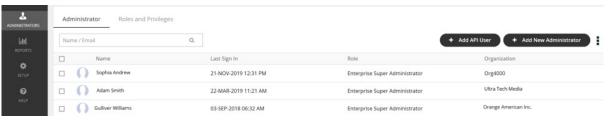
Admin accounts allows people in your organization to access the Management Portal.

Before you Start

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

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.



- 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)).



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

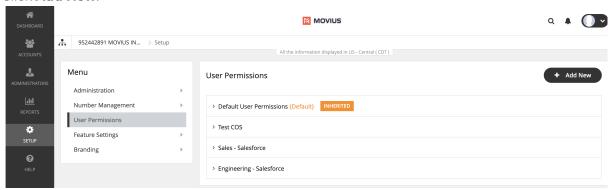
User permissions define what app features are available to users of the MultiLine app. User permissions are set at the organization level and are inherited by any sub-organizations. If your sub-organization has an inherited user permission, you must edit the user permission at the level it was defined.

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).
- **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 Data Minutes Fall Back	Outbound Call Settings Data Minutes Choose On Dialer	Contact Sources Use Native Local Exchange	Personalization Use 'MultiLine' As Contact Label
General Settings Allow Call Forwarding Allow Scheduler Allow "Show Caller ID" Allow Simultaneous /	Visual Voicemail ✓ Allow Spoken Name Recording ✓ Allow Custom Greeting Recording	Onboarding Enable E-Mail PIN	
✓ Allow Advanced Wi-Fi Setting ✓ Allow Block Caller			
✓ Allow SMS			☐ 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.

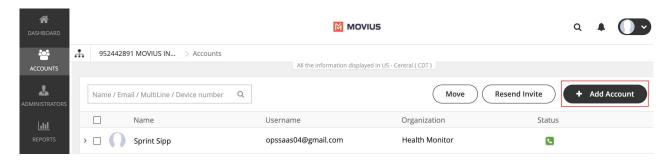
Before you Start

- 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

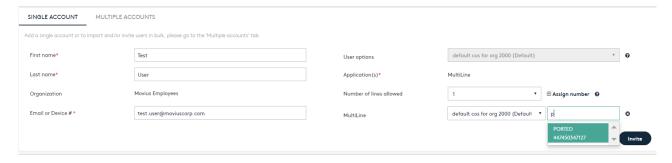


From Accounts, you can add accounts individually, or upload multiple accounts using a CSV file. Either way, first go to the **Accounts** tab, and then click **Add Account**.



Add a single account

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



- 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.

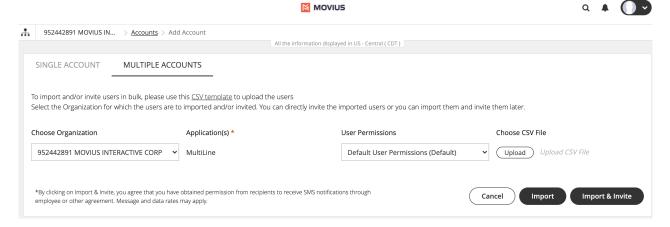


Note that the available fields on this screen will vary based on your organization's setup.

Add multiple accounts

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



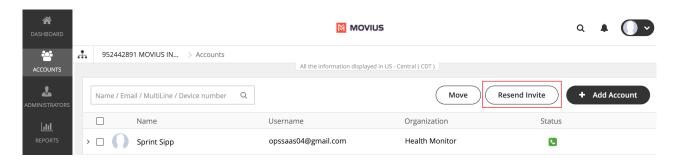


- 1. Click the Multiple Accounts tab.
- 2. Download the **.CSV template** and paste in your users. You can copy/paste from an Excel document.
- 3. Choose the **sub-organization** that you want these users to be added to.
- 4. Choose the **User Permissions** group for this upload.
- 5. Upload the CSV and click **Import and Invite**. This will trigger the invitation to all the users in the CSV. <u>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.</u>

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.



- 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) 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) 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.movjuscorp.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

