

Add and invite users to MultiLine with batch CSV upload

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Learn how to add and invite a batch of users to MultiLine using the batch CSV upload.

Overview

A MultiLine administrator is responsible for adding users to the Management Portal and sending the users MultiLine invitations. MultiLine invitations give them the required information they need to activate MultiLine.

You can [add a single user account](https://help.moviuscorp.com/help/send-multiline-invitations-add-users) <https://help.moviuscorp.com/help/send-multiline-invitations-add-users>, 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

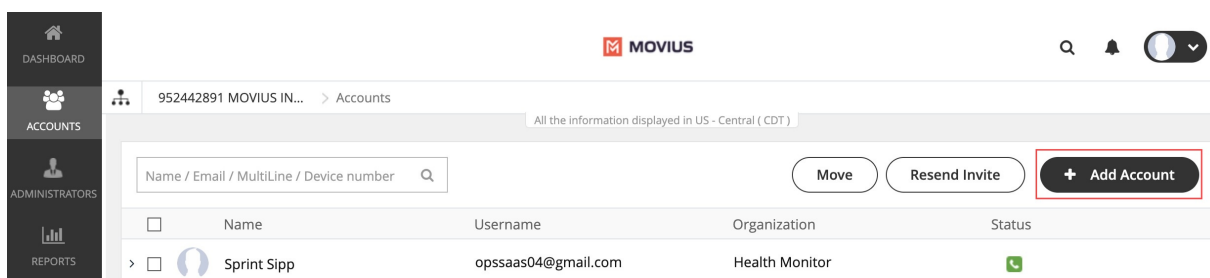
- An admin must have "Accounts" Privilege in their Role in the organization to do these instructions. See [What Admin Privileges are in Management Portal?](https://help.moviuscorp.com/help/what-admin-roles-mmp) <https://help.moviuscorp.com/help/what-admin-roles-mmp>
- You can add up to 1000 accounts at once by uploading a CSV file using this procedure.
- If you would like to [customize the email invitation](https://help.moviuscorp.com/help/customize-email-invitations) <https://help.moviuscorp.com/help/customize-email-invitations>, you should do this prior to inviting users.
- If your users need [custom permissions](https://help.moviuscorp.com/help/set-user-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.

Add and Invite users with the Batch CSV

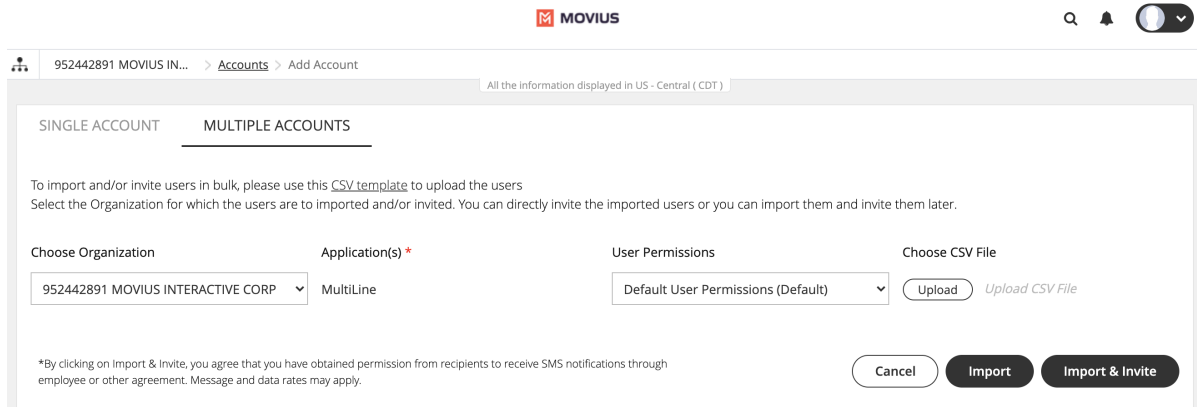
You can add and invite users using the Batch CSV from the **Accounts** screen.

- If you are uploading users in multiple organizations, or multiple permission groups, you will create a separate .CSV file for each organization or permission group.
- You can add up to 1000 accounts at once by uploading a CSV file using this procedure.

1. Go to the **Accounts** tab, and then click **Add Account**.



2. Select the **Multiple Accounts** tab and download the **.CSV template** from the instructions.



3. Edit the .CSV template in your editor of choice.

1. Fill out the details. See "Table of CSV values" below for more information.
2. Delete the "Note" with instructions.

4. Return to the **Multiple Accounts** screen.

5. Select from the **Choose Organization** drop-down, the organization for this upload.

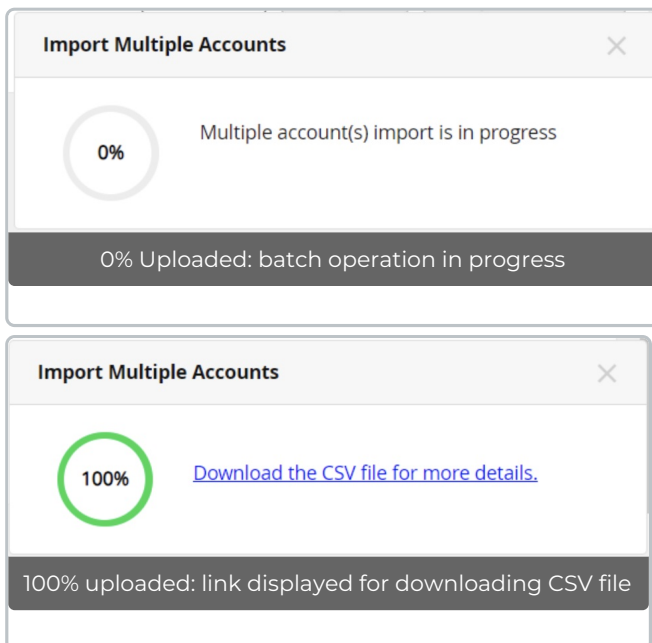
6. Select from the **User Permissions** drop-down, the User Permissions group for this upload. See [Create user permissions](https://help.moviuscorp.com/help/set-user-permissions) for more information.

7. Select the **Upload** button and then select your CSV file.

8. You can import and invite users to begin using MultiLine immediately, or import them and send their invitation to use MultiLine at a later time.

1. Select **Import** to add the users without sending them invitations to use MultiLine. *Note: You will use the "Resend Invitation" process when ready to invite the users to MultiLine.*
2. Select **Import & Invite** to add the users and send their invitations to begin using MultiLine.

9. Progress on the import will be displayed in a window, and when completed you can download the **Batch Operations Report CSV** file.



Once your batch of users has completed uploading, a record is created in Batch Operation Reports, and if configured, designated administrators will receive a notification and summary of the report. See also [Batch Operation Reports](https://help.moviuscorp.com/help/batch-operation-reports)

If you do not set `primary_number` in the CSV, end-users will have the option to select from a short list of available numbers during MultiLine activation.

Table of CSV values

Name	Mandatory?	Description	Note
firstname	optional	Used to set user's first name	-
lastname	optional	Used to set user's last name	-
email address or device	mandatory	Accepts standard email address or phone number	Must be email if using SMTP data offload
social_messaging	mandatory	Yes / No	Yes: enables social messaging (WhatsApp, WeChat, and LINE) No: disables social messaging
multiline_number	optional	Used to set the MultiLine number	Must be an Available number and not allocated to another organization
monitor_calls	mandatory	auto / off	auto: records calls off: does not record calls
monitor_sms	mandatory	on / off	on: records SMS off: does not record SMS
forwarding_number	optional	Accepts values between 4 to 18 digits with country code	Used for accounts that do not have voice calling enabled
restrict_incoming_social_messaging	optional	Accepts true / false	Column only included in the CSV if the organization is configured with Social Messaging; Value only applicable when social_messaging is set to "Yes"
Language	optional	Accepts English, Italian, German, French, and Spanish	

- Moving 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.
