



# HOW TO MANAGE PORTAL USERS AND ADMINS

Fusion Connect Client Portal

## Resources

### Watch a Video:

[How To Manage Portal Users and Admins](#)

### More Resources:

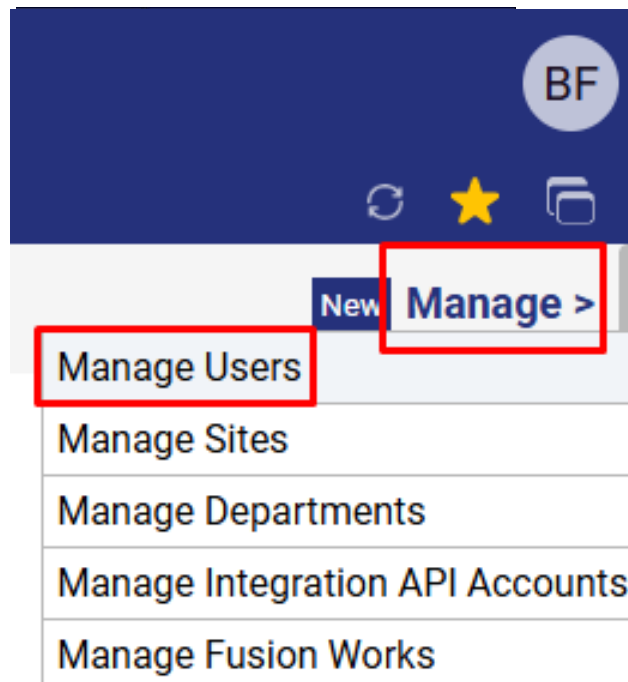
See a complete list of Fusion Connect Client Portal How-To Documents here:

<https://www.fusionconnect.com/support/portal-support>



## How do I manage my portal users and admins?

You can manage the portal Users and Admins, click on **Manage** (top right corner of your Portal), then choose **Manage Users**. This will take you to a list of your current Admins and/or Users:



A new tab will open. Scroll to the bottom of the page and in the User section, you can manage your Users.

User

▼ Name  X

Name	User ID	Label	Administrator	Invoices	Orders	Services	Tickets	Roles
Alex Stewart	astewart	Alex Stewart	✓					Administrator
Billy Fisher	bfisher	Billy Fisher	✓					Administrator
Cindy Burns	cburns	Cindy Burns	✓					Administrator
Kyle Johnson	kjohnson	Kyle Johnson	✓					Administrator
Sama Taku	Staku	Staku	✓					Administrator
Spider Man	7039351803@megapathvoice.c	Aquaman Aquaman (+1703935		Hide	Hide	Hide	Hide	

1 - 6 of 6

[Delete](#) [Add](#) [Edit](#) [Reset and Email Password Link](#) ⋮

To Delete a user, click the **Delete** button.

User

▼ Name  X

Name	User ID	Label	Administrator	Invoices	Orders	Services	Tickets	Roles
Alex Stewart	astewart	Alex Stewart	✓					Administrator
Billy Fisher	bfisher	Billy Fisher	✓					Administrator
Cindy Burns	cburns	Cindy Burns	✓					Administrator
Kyle Johnson	kjohnson	Kyle Johnson	✓					Administrator
Sama Taku	Staku	Staku	✓					Administrator
Spider Man	7039351803@megapathvoice.c	Aquaman Aquaman (+1703935		Hide	Hide	Hide	Hide	

1 - 6 of 6

[Delete](#) [Add](#) [Edit](#) [Reset and Email Password Link](#) ⋮

Then, select the appropriate user to delete by placing a checkmark beside the Name, and then select the **Delete** button at the bottom.

User

**DELETING**

Name	User ID	Label	Administrator	Invoices	Orders	Services	Tickets	Roles
<input type="checkbox"/> Alex Stewart	astewart	Alex Stewart	✓					Administrator
<input checked="" type="checkbox"/> Billy Fisher	bfisher	Billy Fisher	✓					Administrator
<input type="checkbox"/> Cindy Burns	cburns	Cindy Burns	✓					Administrator
<input type="checkbox"/> Kyle Johnson	kjohnson	Kyle Johnson	✓					Administrator
<input type="checkbox"/> Sama Taku	Staku	Staku	✓					Administrator
<input type="checkbox"/> Spider Man	7039351803@megapathvoice.c	Aquaman Aquaman (+1703935		Hide	Hide	Hide	Hide	

Clear All Show Modified Only

**Delete** Cancel

You can also Edit the privileges of Users by selecting the **Edit** button at the bottom.

User

▼ Name  X

Name	User ID	Label	Administrator	Invoices	Orders	Services	Tickets	Roles
<input checked="" type="checkbox"/> Alex Stewart	astewart	Alex Stewart	✓					Administrator
<input checked="" type="checkbox"/> Billy Fisher	bfisher	Billy Fisher	✓					Administrator
<input checked="" type="checkbox"/> Cindy Burns	cburns	Cindy Burns	✓					Administrator
<input checked="" type="checkbox"/> Kyle Johnson	kjohnson	Kyle Johnson	✓					Administrator
<input checked="" type="checkbox"/> Sama Taku	Staku	Staku	✓					Administrator
<input checked="" type="checkbox"/> Spider Man	7039351803@megapathvoice.c	Aquaman Aquaman (+1703935		Hide	Hide	Hide	Hide	


1 - 6 of 6

**Delete** **Add** **Edit** **Reset and Email Password Link** ⋮

Then, select the preferences you would like to update and click the **Save** button.

User



**EDITING**







Name	User ID	Label	Administrator	Invoices	Orders	Services	Tickets	Roles
Alex Stewart	astewart	Alex Stewart	<input checked="" type="checkbox"/>					Administrator
 Billy Fisher	bfisher	Billy Fisher	<input type="checkbox"/>	Hide	Hide	Hide	Hide	Administrator
Cindy Burns	cburns	Cindy Burns	<input checked="" type="checkbox"/>	Hide				Administrator
Kyle Johnson	kjohnson	Kyle Johnson	<input checked="" type="checkbox"/>	Pay				Administrator
Sama Taku	Staku	Staku	<input checked="" type="checkbox"/>	View				Administrator
Spider Man	7039351803@megapathvoice.c	Aquaman Aquaman (+1703935	<input type="checkbox"/>	Hide	Hide	Hide	Hide	

1 - 6 of 6 Show Modified Only


If a User cannot login, you can use the **Reset and Email Password Link** button to send them an email by clicking the button at the bottom.

User

 Name  

Name	User ID	Label	Administrator	Invoices	Orders	Services	Tickets	Roles
 Alex Stewart	astewart	Alex Stewart	<input checked="" type="checkbox"/>					Administrator
 Billy Fisher	bfisher	Billy Fisher	<input checked="" type="checkbox"/>					Administrator
 Cindy Burns	cburns	Cindy Burns	<input checked="" type="checkbox"/>					Administrator
 Kyle Johnson	kjohnson	Kyle Johnson	<input checked="" type="checkbox"/>					Administrator
 Sama Taku	Staku	Staku	<input checked="" type="checkbox"/>					Administrator
 Spider Man	7039351803@megapathvoice.c	Aquaman Aquaman (+1703935		Hide	Hide	Hide	Hide	

1 - 6 of 6



Then, select the appropriate user from the list, place a checkmark by the Name, and select the **Reset and Email Password Link** button.

User

**RESET AND EMAIL PASSWORD LINK**

Name	User ID	Label	Administrator	Invoices	Orders	Services	Tickets	Roles
<input type="checkbox"/> Alex Stewart	astewart	Alex Stewart	✓					Administrator
<input checked="" type="checkbox"/> Billy Fisher	bfisher	Billy Fisher	✓					Administrator
<input type="checkbox"/> Cindy Burns	cburns	Cindy Burns	✓					Administrator
<input type="checkbox"/> Kyle Johnson	kjohnson	Kyle Johnson	✓					Administrator
<input type="checkbox"/> Sama Taku	Staku	Staku	✓					Administrator
<input type="checkbox"/> Spider Man	7039351803@megapathvoice.c	Aquaman Aquaman (+1703935		Hide	Hide	Hide	Hide	

Clear All Show Modified Only

Reset and Email Password Link Cancel

To Add a User, click the **Add** button at the bottom.

User

▼ Name  X

Name	User ID	Label	Administrator	Invoices	Orders	Services	Tickets	Roles
<input checked="" type="checkbox"/> Alex Stewart	astewart	Alex Stewart	✓					Administrator
<input checked="" type="checkbox"/> Billy Fisher	bfisher	Billy Fisher	✓					Administrator
<input checked="" type="checkbox"/> Cindy Burns	cburns	Cindy Burns	✓					Administrator
<input checked="" type="checkbox"/> Kyle Johnson	kjohnson	Kyle Johnson	✓					Administrator
<input checked="" type="checkbox"/> Sama Taku	Staku	Staku	✓					Administrator
<input checked="" type="checkbox"/> Spider Man	7039351803@megapathvoice.c	Aquaman Aquaman (+1703935		Hide	Hide	Hide	Hide	

1 - 6 of 6

Delete Add Edit Reset and Email Password Link ⋮

Add your new User's User Id and User Label.

*\*Note: the User Label is what will be listed as their User Id within the portal.*



The screenshot shows a 'Profile Information' form with the following fields: User Id \*, User Label \*, First Name \*, Last Name \*, Email Address \*, and Phone Number \*. The 'User Id \*' and 'User Label \*' fields are highlighted with a red rectangle. Below the fields is a note: 'Please enter contact phone with country code. E.g. +1'. At the bottom, there is a checkbox labeled 'Send Reset Password Email'.

Then add their First Name, Last Name and Email Address.

*\*Note: the Email Address is important since they will be emailed confirmation that they've been added to the portal and this will allow them to set up their password.*



The screenshot shows the same 'Profile Information' form. In this view, the 'First Name \*', 'Last Name \*', and 'Email Address \*' fields are highlighted with a red rectangle. The other fields and the bottom section remain the same as in the previous screenshot.

Then, enter the Phone Number.

*\*Note: Make sure you add the plus one in front of their area code.*



Profile Information

User Id \*

User Label \*

First Name \*

Last Name \*

Email Address \*

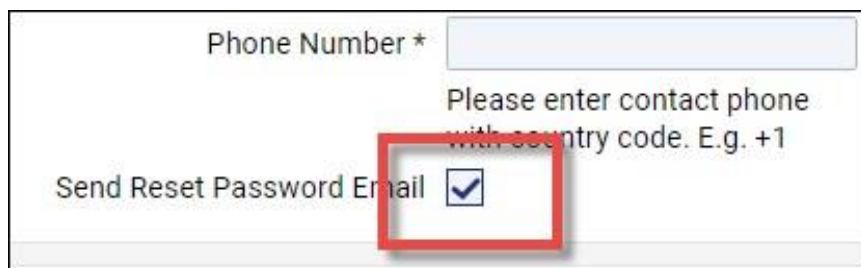
Phone Number \*

Please enter contact phone with country code. E.g. +1

Send Reset Password Email ☐

A red rectangular box highlights the Phone Number field and the instruction text below it. A red circular icon with a white exclamation mark is positioned to the right of the instruction text.

Then, check the **Send Reset Password Email** box. This allows that confirmation e-mail to be sent to this user's e-mail address, allowing them to set up their password.



Phone Number \*

Please enter contact phone with country code. E.g. +1

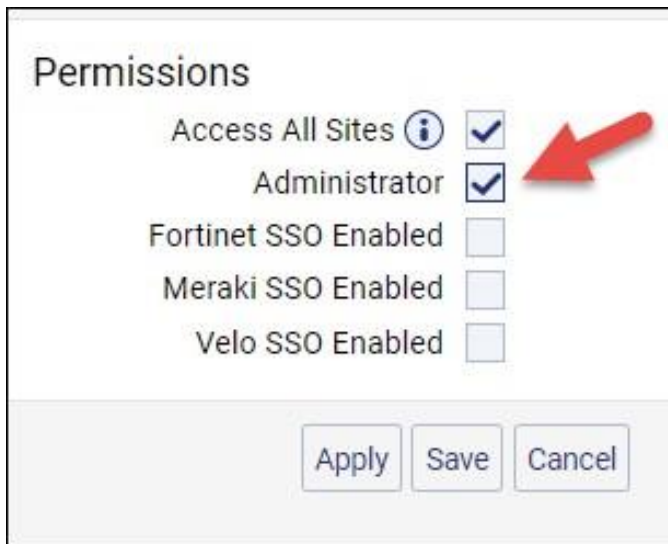
Send Reset Password Email ☒

A red rectangular box highlights the Send Reset Password Email checkbox, which is now checked.




Next, select the Permissions you would like to grant this User.

*Note: Selecting Administrator will grant them full access to your portal.*



**Permissions**

Access All Sites  ☒

Administrator ☒

Fortinet SSO Enabled ☐

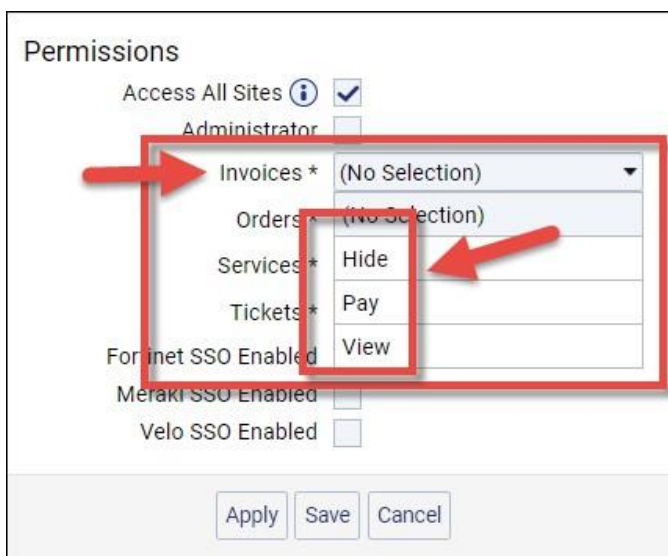
Meraki SSO Enabled ☐

Velo SSO Enabled ☐


Apply Save Cancel

If you do not want them to be a full Administrator, you can select the permissions you would like them to have.


For Invoices, you can hide that tile from their view, allow them to pay, or just view your invoice.



**Permissions**

Access All Sites  ☒

Administrator ☐

Invoices \* (No Selection) 

Orders \* (No Selection)

Services \* Hide

Tickets \* Pay

View

Fortinet SSO Enabled ☐

Meraki SSO Enabled ☐

Velo SSO Enabled ☐

Apply Save Cancel

For Orders, you can hide the tile, allow them to manage and order service, or just view ordered services.

The screenshot shows the 'Permissions' configuration page. At the top, 'Access All Sites' is checked. Below it, 'Administrator' is unchecked. A list of permissions follows: 'Invoices \*' (No Selection), 'Orders \*' (No Selection), 'Services \*' (No Selection), and 'Tickets \*' (No Selection). A red box highlights the 'Orders \*' and 'Services \*' rows. A red arrow points to the 'Orders \*' row. Another red arrow points to the 'Manage' option in the dropdown menu for 'Tickets \*'. At the bottom, there are 'Apply', 'Save', and 'Cancel' buttons.

For Services, you can hide the tile, allow them to manage your voice services or just view your voice services.

The screenshot shows the 'Permissions' configuration page. At the top, 'Access All Sites' is checked. Below it, 'Administrator' is unchecked. A list of permissions follows: 'Invoices \*' (No Selection), 'Orders \*' (No Selection), 'Services \*' (No Selection), and 'Tickets \*' (No Selection). A red box highlights the 'Services \*' and 'Tickets \*' rows. A red arrow points to the 'Services \*' row. Another red arrow points to the 'Manage' option in the dropdown menu for 'Tickets \*'. At the bottom, there are 'Apply', 'Save', and 'Cancel' buttons.

For Tickets, you can hide the tile, allow them to manage your tickets or just view your tickets.

The screenshot shows the 'Permissions' form. At the top, 'Access All Sites' is checked. Below it, 'Administrator' is unchecked. There are dropdown menus for 'Invoices \*', 'Orders \*', 'Services \*', and 'Tickets \*', all currently set to '(No Selection)'. Below these are checkboxes for 'Fortinet SSO Enabled', 'Meraki SSO Enabled', and 'Velo SSO Enabled'. A red box highlights the 'Tickets \*' dropdown menu, which is open, showing three options: 'Hide', 'Manage', and 'View'. A red arrow points to the 'Hide' option. At the bottom of the form are buttons for 'Apply', 'Save', and 'Cancel'.

If you have SD-WAN services, you can checkmark if the User should have portal permissions for the Fortinet, Meraki or Velo. Then, select the permissions level to allow them either full or read only permissions.

The screenshot shows the 'Permissions' form. 'Access All Sites' is checked. 'Administrator' is unchecked. The dropdown menus for 'Invoices \*', 'Orders \*', 'Services \*', and 'Tickets \*' are all set to '(No Selection)'. The 'Fortinet SSO Enabled' checkbox is checked. Below it, 'Fortinet Permission \*' is a dropdown menu set to '(No Selection)'. Below that, 'Meraki SSO Enabled' and 'Velo SSO Enabled' are unchecked. A red box highlights the 'Fortinet Permission \*' dropdown menu, which is open, showing two options: 'Full' and 'Read Only'. A red arrow points to the 'Full' option. At the bottom of the form are buttons for 'Apply', 'Save', and 'Cancel'.

Once you have completed your selections, click both **Apply** and then **Save**.

**Permissions**

Access All Sites ⓘ ☒

Administrator ☐

Invoices \*

Orders \*

Services \*

Tickets \*

Fortinet SSO Enabled ☒

Fortinet Permission \*

Meraki SSO Enabled ☐

Velo SSO Enabled ☐

After both Apply and Save have been clicked, your new User will be sent an auto-generated email from [noreply@fusionconnect.com](mailto:noreply@fusionconnect.com) asking them to create their password and log in.