



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 the **Manage** link in the Sites tile section.

Corporate Account For Cloud Ser Customer Overview

Sites

Total 8

Down 0

Alarm 0

Off 0

Inactive 0

Site	Account Number	City	State
Ashley Palacol	3418205	HERNDON	VA
Billy Fisher	3850266	HERNDON	VA
Billy Fisher LITTLE RIVER	3992460	LITTLE RIVER	SC

1 of 8

Page 1 of 4

Manage >

View all Sites >

Manage Pa

Services

Orders

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.

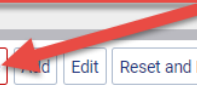
User

▼ 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 X

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	<input type="checkbox"/>	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

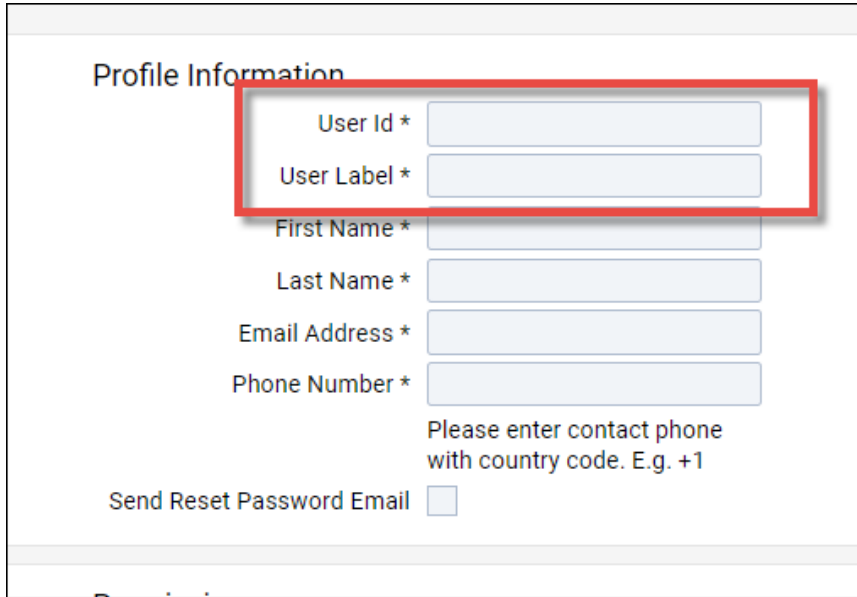
Name	User ID	Label	Administrator	Invoices	Orders	Services	Tickets	Roles
<input checked="" type="checkbox"/> Alex Stewart	astewart	Alex Stewart	✓					Administrator
<input checked="" type="checkbox"/> Billy Fisher	bfisher	Billy Fisher	✓					Administrator
<input checked="" type="checkbox"/> Cindy Burns	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 box. Below the phone number field, there 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 box. The other fields and the note below the phone number field are visible but not highlighted.

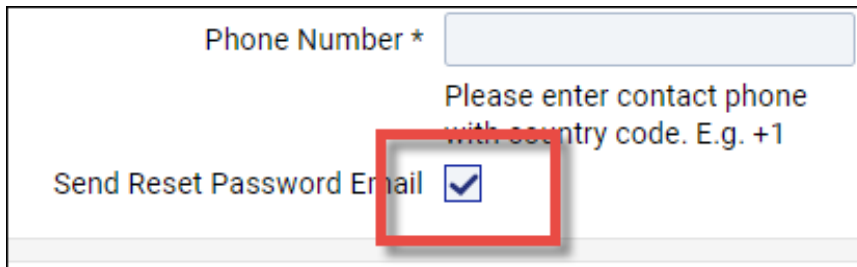
Then, enter the Phone Number.

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



The screenshot shows a 'Profile Information' form with several input fields: User Id *, User Label *, First Name *, Last Name *, Email Address *, and Phone Number *. The Phone Number field is highlighted with a red box. Below it, a red circle with a white exclamation mark contains the text: 'Please enter contact phone with country code. E.g. +1'. At the bottom left, there is a checkbox labeled 'Send Reset Password Email' which is currently unchecked.

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.



This is a close-up of the bottom portion of the form. The 'Phone Number *' field is at the top. Below it is the instruction: 'Please enter contact phone with country code. E.g. +1'. At the bottom, the 'Send Reset Password Email' checkbox is checked, and this checkbox is highlighted with a red box.

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.

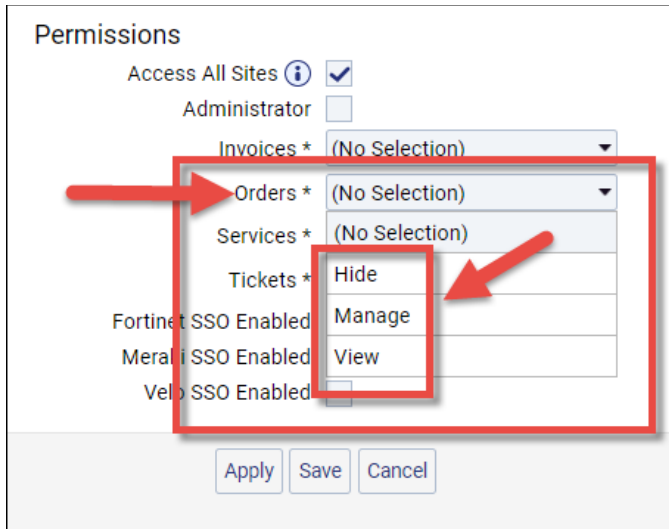
For Invoices, you can hide that tile from their view, allow them to pay, or just view your invoice.

Permissions

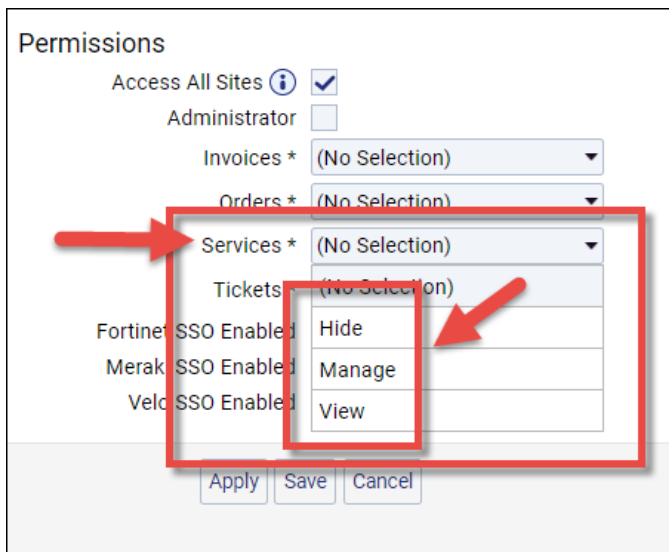
- Access All Sites
- Administrator
- Invoices * (No Selection)
- Orders * (No Selection)
- Services * Hide
- Tickets * Pay
- View
- Fortinet SSO Enabled
- Meraki SSO Enabled
- Velo SSO Enabled

Apply Save Cancel

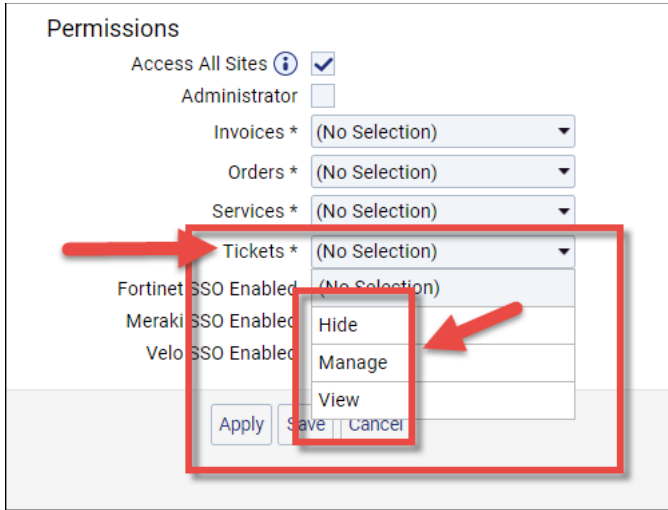
For Orders, you can hide the tile, allow them to manage and order service, or just view ordered services.



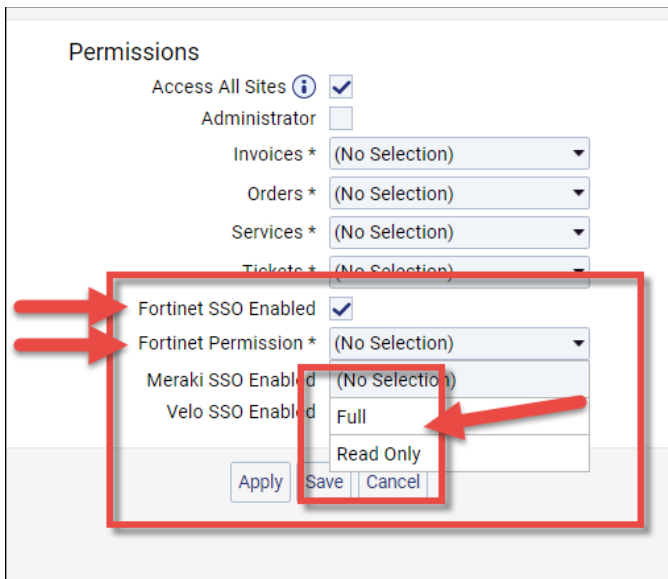
For Services, you can hide the tile, allow them to manage your voice services or just view your voice services.



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



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.



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 asking them to create their password and log in.