HOW TO MANAGE PORTAL USERS AND ADMINS

Fusion Connect Client Portal

Resources

Watch a Video:

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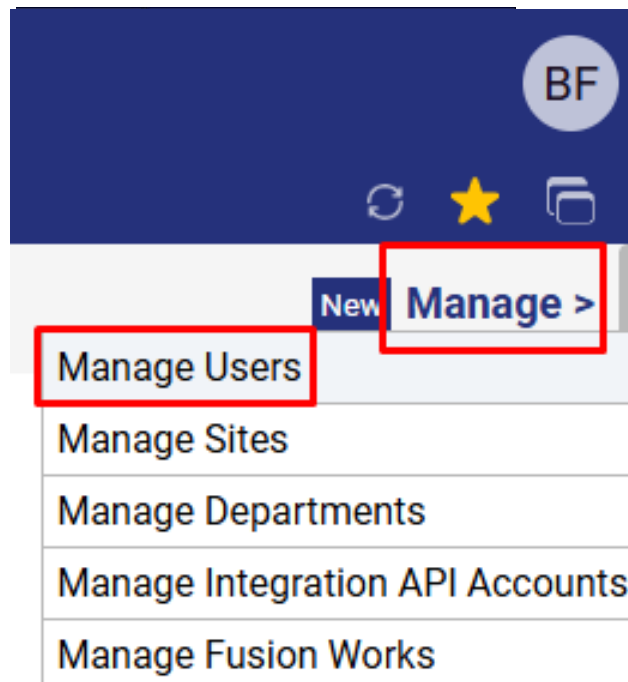
More Resources:

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.

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

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

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

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

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.

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

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

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.

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.

Then, enter the Phone Number.

Note: Make sure you add the plus one in front of their area code.
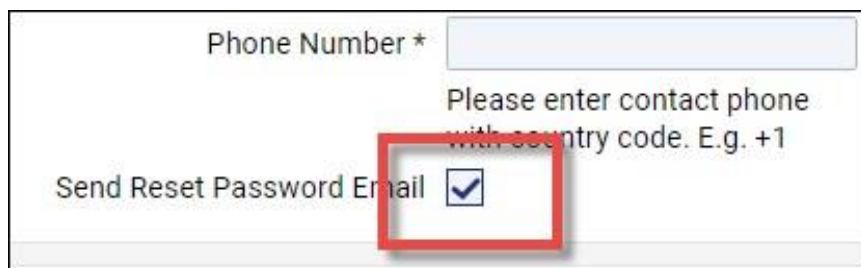
Then, check the **Send Reset Password Email** box. This allows that confirmation e-mail to be sent to this user's e-mail address, allowing them to set up their password.

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

Note: Selecting Administrator will grant them full access to your portal.
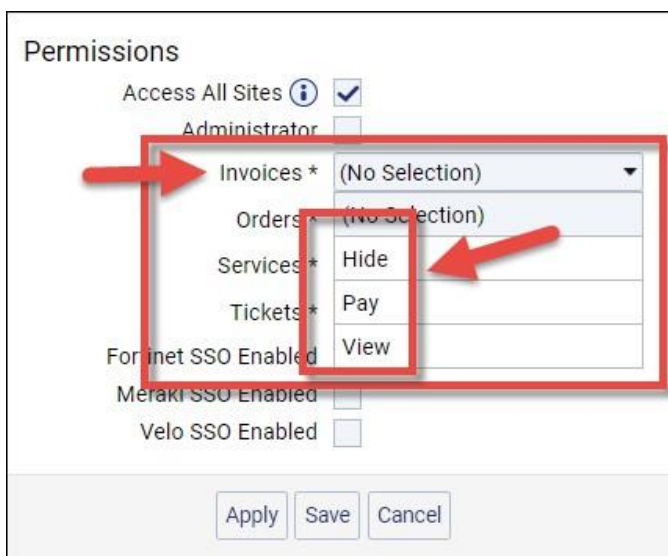
If you do not want them to be a full Administrator, you can select the permissions you would like them to have.

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

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**.

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.