

User Options

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First Steps/Overview

We've created some ways for you to share your Widgets with your colleagues.


Set Login Credentials for Your Team Members

1. First we need to add your team members as authorized Hosts with their own login credentials.
 - Navigate to **Settings/People Management/Host Management**.
 - Click on “New Host” in the top right corner of the screen to bring up the New Host form.
 - Fill out the new Host’s information and assign them a Login Password. Leave the “location” field blank.
 - Make sure to check “Email Credentials” to send the new host their login details, then click **Save**.

The image shows a 'New Host' form with the following fields and options:


- FIRST NAME**: Text input field.
- LAST NAME**: Text input field.
- EMAIL**: Text input field.
- PASSWORD**: Text input field.
- LOCATION**: Dropdown menu with the text 'Select location' and a downward arrow.
- AVATAR**: A circular icon with a person silhouette and a green 'Change' button next to it.
- EMAIL CREDENTIALS?**: A checkbox.
- Save**: A green button at the bottom right.

- You will see your team member on the list of active Hosts. Repeat as required to add additional hosts. The SOAR subscription plan allows for 10 meeting hosts to be added.

Hosts			+ New Host
Name	Status	Actions	
 Alyson Grace	ACTIVE	Edit	Deactivate

Who Can Answer Incoming Videocalls

- For the 3 “Customer Support” presets, as well as any other custom Call Widget configurations you may build on your own, the Account Administrator is the primary host who will answer incoming videocalls. However, you can add additional team members who are authorized to answer a Call Widget.
 - Team members must be assigned to each call-type widget you’d like them to be able to answer. Navigate to Widget Management and scroll to the Call Widget you’d like to add team members to. Click on **Customize** under the “Actions” column.

Widget Management			+ New Widget
Name	Description	Actions	
 Customer Support - Request Meeting		Customize	View Meetings Copy Embed Code

- Scroll down to “**Members of My Team Who Can Answer Incoming Videocalls**” and begin typing the name of a new Host. The name will appear as a drop-down below the field. Click on the name to authorize the new Host to answer incoming videocalls.

WIDGET FUNCTIONALITY

- + Call - Allow inbound video calls.
- Meeting - Create meeting for 2 or more users.
- Copy meeting link to clipboard.
- Open meeting in new browser tab.

MEMBERS OF MY TEAM WHO CAN ANSWER INCOMING VIDEOCALLS (CALL-TYPE WIDGETS ONLY)

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Alyson Grace

- Scroll down to the end of the Edit Widget screen and click on Save.
- The same procedure can be used for a new Call Widget by adding New Hosts first, then clicking on the “New Widget” option in Widget Management and adding the hosts to the “Members of My Team Who Can Answer Incoming Videocalls” field.
- In order to answer the incoming videocalls, your specified team members must be logged in to their Widget administration accounts at widget.magnifi.io to receive those calls

Tips for Small Customer Support Teams

3. For small customer support teams, we suggest designating a generic “Customer Support” email address as one of your 10 Hosts, and having each of your Customer Service representatives sign in as that Host when they are “on-shift”. If you require more advanced customizations (such as individual logins for your customer service team) please use the SDK installation option.

Adding New Hosts to a Meeting Widget using Groups:

Meeting Widgets can only be deployed by the Host(s) of that particular Widget.

Adding Hosts to a Meeting Preset Configuration:

4. To add Hosts to a Preset Meeting Widget, navigate to **Groups/Manage Groups** in the left panel. You’ll see a list of Preset Groups. To help you identify them easily, we’ve named them the same as the Widgets they are linked to. Scroll down to the Group associated with the Meeting Widget you want to edit and click on “**Edit Group**” under the “**Actions**” column for that Widget.

Edit Group

NAME: Instant Meeting

DESCRIPTION:

GROUP ACCESS TOKEN: MBhELpQ

GROUP UNIVERSAL UNIQUE IDENTIFIER (UUID): Instant Meeting

WHICH WIDGET CONFIGURATION WILL THIS GROUP USE?: Instant Meeting

To enable a Team Member to generate meetings with this Widget, add them to the list below

+ Add Member

Save

5. The Edit Group screen will open. Click on the **“+Add Member”** button in the lower right section of the form.
 - Each team member you add, must have a host account. Before starting, make sure that you have added team members in step 1 above prior to starting.
 - Fill out the details for each team member.
 - Make sure **you give each team member a UUID** (Universal Unique Identifier). We suggest using their **email address** as their UUID.
 - To add more team members, click on the **“+Add Member”** button again and another set of fields will appear beneath the first. Repeat as necessary.
 - Click **Save** when you are done.

To enable a Team Member to generate meetings with this Widget, add them to the list below

+ Add Member

FIRST NAME	LAST NAME	EMAIL	MEMBER ACCESS TOKEN	MEMBER UNIVERSAL UNIQUE IDENTIFIER (UUID)
Alyson	Grace	alysongrace@gmail.com	u2j3Fyt	alysongrace@gmail.com

Remove

Save

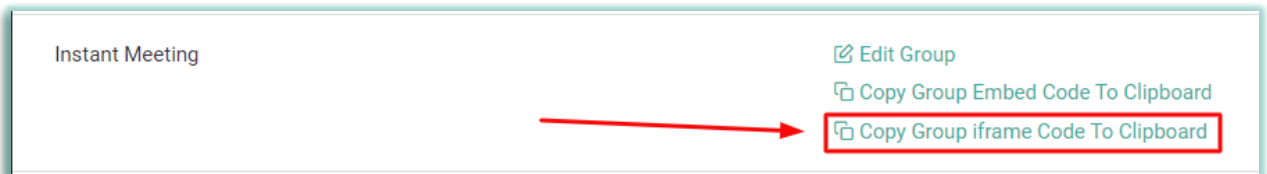
6. To deploy widgets, team members login to the system with their login credentials, and any Widgets they deploy will include their host credentials as part of the code that is embedded.

Adding Hosts to a New Meeting Widget Configuration

7. To Add Hosts to a new Widget configuration is essentially the same process, but you must first create a new Widget configuration in the Widget Admin under **Widget Management**.
 - Click on the “**+New Widget**” button; and configure the Widget as per your requirements. **Save** your configuration.
 - **Set logins** for your team members as in **Step 1**, above.
 - Navigate to **Groups/ Manage Groups** and click on the “**+New Group**” button.
 - Name your group (we suggest using the same name as the Widget it is linked to)
 - Give your group a “**GROUP UNIVERSAL UNIQUE IDENTIFIER.**” The Group UUID can contain alphanumeric characters, dash, and/or underscore. It cannot contain spaces. We suggest something that relates to the Widget/Group name.
 - **IMPORTANT:** under “**Which Widget Configuration will this Group Use?**” make sure to use the dropdown to **select the Widget** you just created.
 - Proceed to add your team members as set out in **Step 4**, above. **Save** when complete.

How to Embed Shared Widget Configurations

8. To embed a Widget with one of your team members as Host:
 - When your team member logs in, the Widget and Group configurations to which you added them will be automatically shared to their Widget Management and Manage Groups pages, respectively.



- Request your team member **Copy** the relevant **Group iframe Code** to their clipboard and send it to you (We suggest they paste it into a program like Notepad on a Windows 10 computer, or Text Edit on Mac, save the file, and then email it to you). This ensures that the iframe code includes the team member’s host credentials.
- Paste the iframe code into your website or application, and Save.