

# Set Up Organization Roles

This page contains instructions on how to add limits and permissions to an Organization account.

- [Overview](#)
- [Set permissions](#)
- [Set limits](#)
- [Select incoming phone numbers](#)

## Overview

To configure the organization's permissions and limits, select the **Choose roles and phone numbers** checkbox in the **Add Organization** page and click **OK**. As soon as you click **OK**, the information on the newly created account is sent by email to the account owner (contact person), but only if the administrator had enabled the **Organization account creation** option from its **Email Templates** page.

An organization that does not have its limitations and permissions set will have all the **Permissions** disabled and all the limits set to 0. The account expiration date is unlimited.

In the **Roles and Phone Numbers for <organization\_name>** page, you can make all the necessary settings.

About permissions and limits for organizations using subscription

If you've created the organization using a [subscription template](#), note that the organization will automatically be assigned the permissions and limits set in that template. However, if subsequently to creating the organization, the admin changes your service provider account levels and permissions, a system verification will be performed.

Upon verification, if the latest service provider account limits and permissions are smaller than those defined in the organization's subscription, the service provider's limits and permissions will be enforced on the organization account. Hence, the subscription will not be modified, but the organization will be restricted to the newly changed service provider account limits and permissions.

So, if you see a warning message next to the permissions and limits in the organization's **Roles and Phone Numbers** page, it's because they are conflicting with the latest service provider account limits and permissions, which ultimately take priority over the values set in the organization's subscription.

## Set permissions

This section allows you to enable or disable permissions on extensions, users management, or phone number management.

Permission	When Enabled	Additional Info
<b>Roles management</b>	The organization can change the users' permissions and limits.	
<b>Extensions and users management</b>	The organization can add and remove users from its account.	Even if this permission is disabled on its account, the organization can still edit the user's contact details. Selecting the <b>Extensions and users management</b> checkbox will automatically select the <b>Roles management</b> and the <b>Extension features management</b> checkbox.
<b>Extension features management</b>	The organization can manage the extension's functions.	If this permission is not activated, the organization cannot enable /disable voicemail, call recording and conference features on Phone terminal extensions or change the queue size on Queue extensions.
<b>Phone extension SIP management</b>	The organization can use the provisioning features on its Phone terminal extensions, as well as set and view the <b>Phone extension SIP management</b> permission for their users. The organization can choose the <b>Allowed codecs</b> option for Phone terminal extensions.	For more information on this topic, you may visit the <a href="#">Provisioning</a> section.
<b>SIP Trunking management</b>	The service provider will be able to activate SIP Trunking on an extension.	This permission cannot be activated unless <b>Phone extension SIP management</b> is active.
<b>Charging plans management</b>	The organization is able to add, remove or change charging plan parameters.	These charging plans can be applied on its user accounts and are used for charging them.
<b>Sound management</b>	The organization can manage, add, remove or modify sound and music on hold files, folders and languages.	

<b>Phone numbers management</b>	The organization can assign public phone numbers to users from its own public phone numbers pool.	
<b>UnifiedAPI management</b>	The organization and its users can use UnifiedAPI and manage third-party applications that are allowed to access the system resources on their behalf, as resource owners. Remote applications are able to handle local and external calls using these users and they are authenticated with the OAuth protocol.	This permission is not available unless the service provider that owns the organization has enabled the UnifiedAPI management option. Even if this option is not enabled, the organization and its users will still be able to manage the SystemAPI. When this option is disabled, the <b>Call Events</b> feature is also disabled for all the organization's extensions.
<b>CallerID management</b>	The organization can edit the CallerID of its users's extensions.	This also allows organization owners to assign this permission to their users as well.

Furthermore:

Permission	Description	
<b>Allow to provision devices</b>	<p>Choose the <a href="#">provisioning permission level</a> granted to the organization account owner. Depending on your selection, the organization account owner will be able to add new SIP devices or not:</p> <ul style="list-style-type: none"> <li>• <b>Modify</b> - Can add SIP devices in his/her own context as well as in the context of his/her Users, regardless of their provisioning permissions.</li> <li>• <b>View</b> <ul style="list-style-type: none"> <li>- Can add SIP devices in the Organization context, but can only assign them to Users with <b>Modify</b> permissions.</li> <li>- Can add SIP devices in the Organization context without assigning them as long as there are no Users with <b>Modify</b> permissions in his system.</li> <li>- Can add SIP devices in a User context on the condition that the User has <b>Modify</b> permission. Otherwise, he can't.</li> </ul> </li> <li>• <b>None</b> - Cannot access the SIP Devices area as it is no longer displayed in the interface.</li> </ul> <p>For more details on the organization account owner's rights to provision and manage SIP devices, please read <a href="#">this page</a>.</p>	
<b>Organization type</b>	<p>Choose the way that the organization's users interact:</p> <ul style="list-style-type: none"> <li>• <b>Business:</b> Users are part of a business organization. They can get in touch with each other.</li> <li>• <b>Residential group:</b> Users are part of a residential group. They are unaware of being part of a group, and cannot get in touch with each other. Choosing this option will hide the <b>User is multi user aware</b> option for all the organization's users.</li> </ul>	
<b>Allow user level permissions and limits</b>	<p>Whenever an organization is created based on a <a href="#">subscription template</a>, all its users inherit the organization's limits and permissions.</p> <p>If you want to enable customization of permissions and limits for certain users, you need to select this checkbox. This will allow you to adjust limits and permissions in the user's context (i.e. the <a href="#">Roles and Phone Numbers</a> area).</p>	

## Set limits

In this area, you can set limitations for the maximum number of users, extensions, mailboxes, etc. allowed for an organization account. You can also set an expiration date for the organization account.

When defining the maximum number of extensions and the maximum storage space, you need to take into account the values set for the service provider that owns the organization.

You get an error message when the number of extensions or the maximum storage allocated to the organization exceeds the one allocated to the service provider.

The **Unlimited** checkbox might be disabled for certain options for which the service provider has some limitations defined on their account.

Where available, you can select the **Unlimited** checkbox if you do not want to restrict the organization.

Limit	Description
<b>Maximum number of users</b>	The maximum number of users that can be created by the organization account.
<b>Maximum number of phone extensions</b>	The maximum number of Phone terminal extensions that can be created by the organization account.

<b>Maximum number of queue extensions</b>	The maximum number of Queue extensions that can be created by the organization account.
<b>Maximum number of IVR extensions</b>	The maximum number of IVR extensions that can be created by the organization account.
<b>Maximum number of voicemail center extensions</b>	The maximum number of Voicemail center extensions that can be created by the organization account.
<b>Maximum number of queue login center extensions</b>	The maximum number of Queue login center extensions that can be created by the organization account.
<b>Maximum number of conference extensions</b>	The maximum number of Conference extensions that can be created by the organization account.
<b>Maximum number of callback extensions</b>	The maximum number of Callback extensions that can be created by the organization account.
<b>Maximum number of callback callerIDs</b>	The maximum number of callback CallerIDs.
<b>Maximum number of calling card extensions</b>	The maximum number of Calling card extensions that can be created by the organization account.
<b>Maximum number of calling card codes</b>	The maximum number of Calling Card codes that can be created by the organization account.
<b>Maximum number of intercom /paging extensions</b>	The maximum number of Intercom/paging extensions that can be created by the organization account.
<b>Maximum public concurrent calls</b>	<p>Limits the number of active simultaneous calls between the organization account's extensions and any other public network destination. The value defined here cannot be bigger than the one set for the service provider and it restricts all the organization's extension accounts as well. Both incoming and outgoing calls are included!</p> <p>By default, when adding a new account, the <b>Maximum public concurrent calls</b> value is set to 1 as it is mandatory to allow at least one active call.</p> <p>The <b>Maximum public concurrent calls</b> depends on the license type, as the sum of values given to this parameter for all the <code>Phone terminal</code> extensions in the system determine the total number of SIP trunking channels, which is limited according to your license.</p> <p>Have in mind that if you set this parameter to <b>Unlimited</b>, then SIP trunking cannot be enabled on extension level from the <a href="#">Provisioning and SIP Preferences page</a>. Therefore, if you want this feature to be used, then it is advisable to set the <b>Maximum public concurrent calls</b> to a value smaller or equal to the limit imposed by your license.</p> <p>The maximum value that can be set by each one of the organization's extensions to their <b>Maximum public concurrent calls</b> parameter is the one set for the organization.</p> <p><b>Example:</b>          If the value set for the organization is 100 and 5 extensions are added to its account, then each of them is able to set its <b>Maximum public concurrent calls</b> to 100.          In case the total active concurrent calls of all the organization's extensions reaches the limit imposed to his account, VoipNow will play a busy tone to all the other calls over this limit. In other words, for the above example, only 100 concurrent calls are allowed on the channel for the organization, and the rest, up to 500, the maximum value for all the 5 extensions, is rejected.</p>

<b>Maximum internal concurrent calls</b>	Limits the number of active simultaneous calls between the organization account's extensions and any other internal network destination. The value defined here restricts all the organization's extension accounts as well. Both incoming and outgoing calls are included. By default, when adding a new account, the <b>Maximum internal concurrent calls value</b> is set to 1 as it is mandatory to allow at least one active call.
<b>Maximum number of queue members</b>	Limits the number of agent extensions that can be added to a queue belonging to this organization account.
<b>Maximum storage</b>	Prior to VoipNow 5.0.0, each category of resources (voicemail messages, call recordings, sound files, music on hold, fax files) had a dedicated storage space. As of VoipNow 5.0.0, maximum storage represents the total storage space allocated to all the above-mentioned resources. If at least one of these former limits had an <b>Unlimited</b> value, then the maximum storage will be <b>Unlimited</b> as well.
<b>Account expiration date</b>	If you want to set an expiration date for the organization account, deselect the <b>Unlimited</b> checkbox and press the calendar button. Click the date on which you want the account to expire. When the organization account expires, all its user accounts expire as well.

## Select incoming phone numbers

In this area you can assign/unassign public phone numbers to the organization account. This section is displayed if at least one of the following requirements is met:

1. At least one public phone number is available in the system (i.e. available means that it has not been assigned to another organization account)
2. When logging in with an organization account, the **Phone numbers management** permission is enabled

Define limits:

- **Available public phone numbers:** The list contains all the unassigned public phone numbers in the system. To assign a public phone number to the organization, click the desired number and it will be automatically moved into the **Assigned public phone numbers** pool.
- **Assigned public phone numbers:** This list contains all the public phone numbers assigned to the organization. To remove a phone number from the pool, click the desired number and it will be automatically moved back into the **Available public phone numbers** list.  
Have in mind that, when you unassign a public phone number that is used as a CallerID by a Phone terminal extension, you are also removing it from the CallerIDs list.

Click **OK** to set the permissions, limits and phone numbers for the new organization or **Cancel** to add the organization without saving the permissions and phone numbers.

Related topics

[Add an organization account](#)

[Manage an organization account](#)

[Check an organization's options](#)