

MultiLine Knowledge Base PDF

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What is MultiLine?

Last Modified on 10/31/2021 8:16 pm EDT

What is MultiLine?

MultiLine is a cloud-based communications service that provides you an additional secure business number for all your business communications on your existing smartphone and carrier network. The MultiLine App gives you a separate business number for all your work calls, texts, voicemail, and contacts while giving you complete privacy over your personal number.

- Separation of business and personal
 - Whether you're using your own phone or a company phone, what you do in MultiLine stays in MultiLine, and what you do outside of MultiLine stays outside of MultiLine.
- Ease of number management
 - Your organization's IT group is fully in charge of the purchased numbers, providing you access to the service, configuring the look and feel of the app, and setting up the features you'll use.
- Compliance
 - If your organization requires it, MultiLine automatically takes care of call and message recording, recording announcement prompts (letting both users know the call is recorded), and getting consent from your clients to send messages (Messaging).
- Customer service:
 - Connecting to clients where they prefer to communicate, whether that's calling, SMS, or WhatsApp.

Mobile apps

All MultiLine mobile apps provide a separate number, contact list, and voicemail that you can use to communicate with your clients. Because this number is a real carrier supported number, you don't need an internet connection to call your clients and can call over Minutes or Data (See What's the difference between Data mode and Minutes mode anyway?).

Integrations

Movius for BlackBerry and MultiLine for Intune are MultiLine apps that integrate with your organizations EMM.

- *Movius for BlackBerry* is MultiLine integrated with BlackBerry Dynamics
- *MultiLine for Intune* is MultiLine integrated with Microsoft Intune

Desktop apps

With the Desktop apps, you'll be able to use your MultiLine from the browser or desktop application. So whether you're at your computer or on the go, you'll be able to connect with clients.

WhatsApp Connector

The WhatsApp Connector lets you send WhatsApp messages directly to users on WhatsApp from

your MultiLine application.

- Our connector provides a compliant way to message with WhatsApp users that abides with their terms of service for business accounts.
- Your customers can click on your profile to see that you're messaging them as an official WhatsApp business account and see your business profile
- Your customers can message you from their personal WhatsApp accounts.
- You just need the connector to send WhatsApp messages-- you don't have to use your personal WhatsApp, or even have WhatsApp downloaded on your phone at all.

Wechat messaging support coming soon!

Salesforce Connector

The Salesforce connector lets you send SMS messages directly to users from Salesforce.

You can:

- communicate to your customers within Salesforce.
- make/receive calls and exchange text messages with your customers using your MultiLine number.
- automatically track all communications with your customer thus eliminating the need to manually log calls and texts.

This saves time and reduces human error compared to manual logging. MultiLine Salesforce Connector is the solution to improve the experience of the sales team by helping them sell faster, smarter and in the environment that they are familiar with.

Find and use your invitation

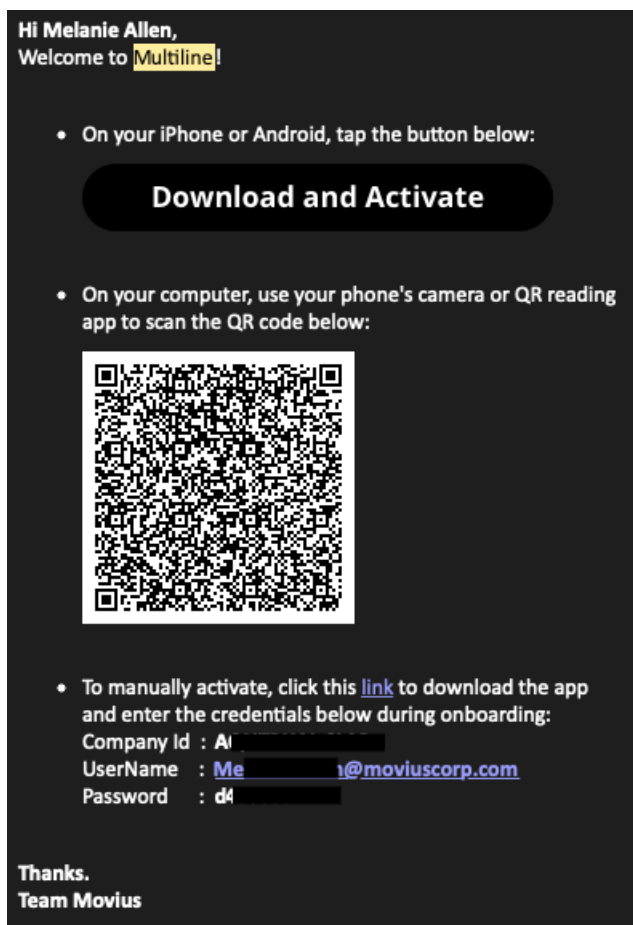
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Everything you need to get started will be sent to you in a MultiLine invitation. You can use it to start the activation process.

Get your invitation

- Expect an invitation to be sent to your work email. *Please don't reply to this email, as it is auto-generated.*
- Your invitation will contain a **Download and Activate** button, a QR code, and credentials for activating MultiLine manually.

Sample Email below:



If you ever need to delete and reinstall the app, even if you're using the same account, you'll need the information from the invitation to set up. Invitations never expire.

Save or archive the email for later. Otherwise, you'll need to contact your company IT administrator to send a new invite any time you need to re-install the app. *Note: You receive MultiLine invitations from your IT organization. Movius or Movius representatives cannot send you invitations.*

You have multiple options for activating MultiLine:

- If you are opening your email on your phone, tap the **Download and Activate** button.
 - It will check if the MultiLine app is installed on your phone and begin installation if not.

The activation process will begin immediately.

- **If you are opening your email on your desktop or tablet**, take out your phone camera and tap the **QR code**.
 - It will check if the MultiLine app is installed on your phone and begin installation if not. The activation process will begin immediately.
 - If you've already downloaded MultiLine, you can also scan the QR code using MultiLine.
 - If necessary, you can also activate manually by entering the details from your invitation. Click the **Activate Manually** link from the invitation or the first screen.
-

Call Settings: Set Data or Minutes calling modes

Last Modified on 11/03/2021 7:17 pm EDT

We want to ensure you stay connected with clients from anywhere. Our patented technology allows you to make and receive calls over wifi, data, and cellular regardless of your underlying carrier.

What is data mode and minutes mode?

Call over Minutes means MultiLine doesn't require an Internet connection for calls.

- You'll still need an Internet connection to send or receive messages.

Example #1: Using Minutes

If you use Minutes mode, MultiLine could work even if you're in a rural area with no access to an internet connection. You will make and receive calls over your carrier minutes plan AT&T, Verizon, T-Mobile, Vodafone, EE, etc...

Call over Data means MultiLine will use an internet connection for calls.

- When you turn on Wi-Fi for your phone, MultiLine will automatically use it for calling, messaging, and other functions.
- If you move outside Wi-Fi coverage, calls will seamlessly transfer to data.

Example #2: Using Data

If you use Data mode and are connected to your office Wi-Fi, and you walk outside the building and start driving in your car, your call will continue without interruption. Behind the scenes, MultiLine seamlessly transitions from Wi-Fi to your data network, so you won't ever have to worry about the call dropping.


MultiLine continuously monitors the quality of your data connection. Look for the colored dot next to the briefcase icon.

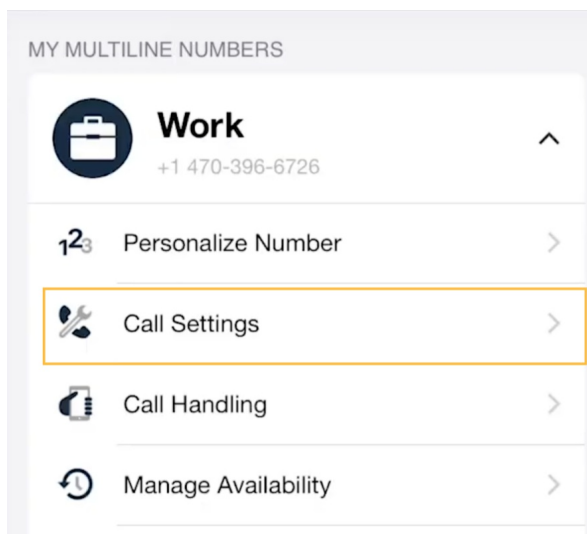
- If it is green, you have a good data connection
- If it is red, your connection is poor and the call quality may be affected when you use data; try switching to minutes
 - The red dot will also appear if you have Data and Wi-Fi turned off in your [Phone Settings](#).



How to set Minutes or Data mode

You can choose when to use data or minutes for calls in the [Settings](#) menu under [Call Settings](#).

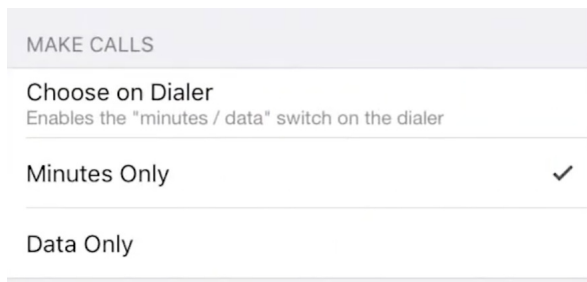
1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap **Settings**, then tap **Call Settings**.



You'll see three options for making and receiving calls.

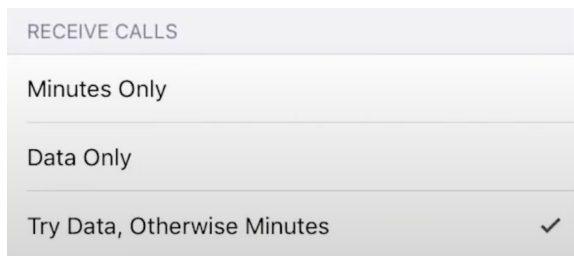
Make calls

Tap the checkmark to choose your setting. Your selection will automatically save when you exit the menu.



Receive calls

Tap the checkmark to choose your setting. Your selection will automatically save when you exit the menu.



Call Handling: Sequential and Simultaneous Dial, Do Not Disturb, Call Forwarding

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Read on to learn about using MultiLine's Call Handling Settings.

Overview

You can use Call Handling in the MultiLine Settings menu to

- Set Simultaneous or Sequential Dial
- Set Call Forwarding
- Set a Business Hours Schedule
- Turn on Do Not Disturb

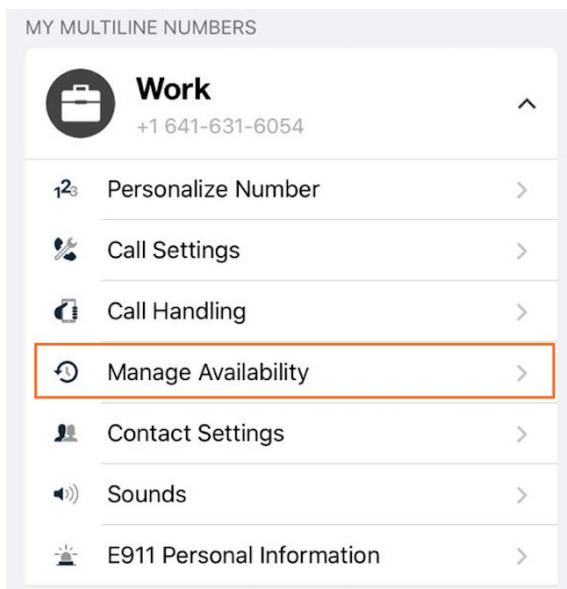
Before you start

- You need to be connected to the Internet to change your Call Handling settings.
- An organization can choose to turn this feature off. If so, you won't see Call Handling in the Settings menu.

Set Simultaneous or Sequential Dial

Use the Call Handling setting to designate multiple numbers for receiving incoming calls all at once (simultaneous), or one at a time in order (sequentially).

1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Go to **Settings** and tap **Manage Availability**.



3. Choose your desired Call Handling setting.


- **Sequential Ring:** Rings the primary MultiLine application and then ring each number one after the other listed in the Add Number list.
- **Simultaneous Ring:** Simultaneously rings all telephone numbers listed in the Add Number list, including your MultiLine number. The first phone to pick up receives the call.
- **Add Number List:** Input a list of numbers to be used by Sequential or Simultaneous ring. The maximum is 10 numbers.

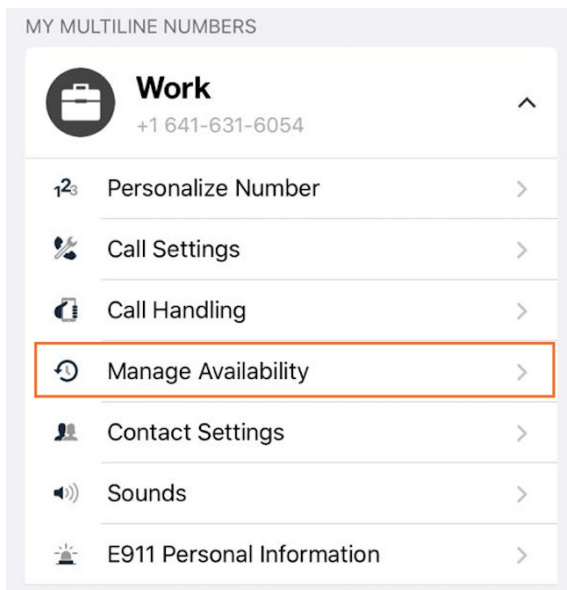
When you leave the menu your settings will automatically apply.

If you have Do Not Disturb or Business Hours settings applied, these rules apply first and your calls will go to voicemail instead of going to the numbers in the Call Handling list.

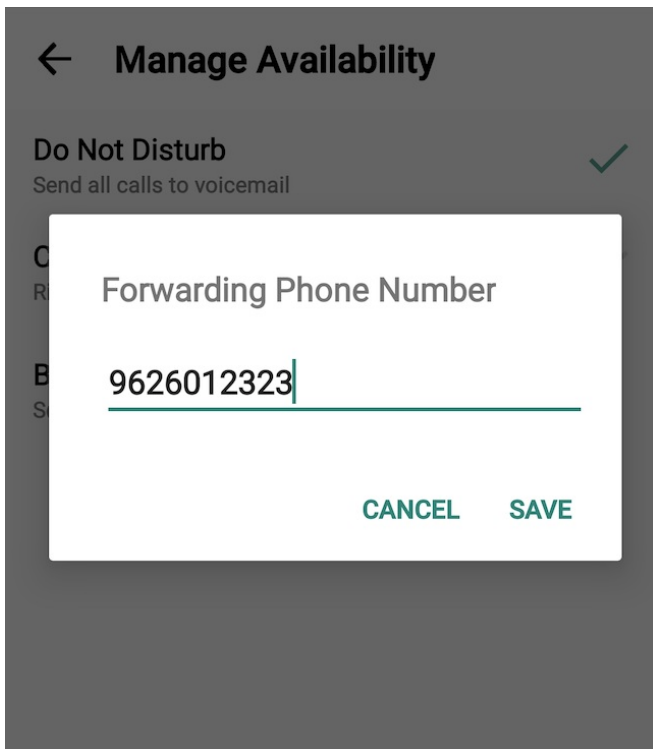
Set Call Forwarding

Use Call Forwarding to send calls to your MultiLine number to the specified number. Your MultiLine phone will not ring or receive the call when Call Forwarding is set.

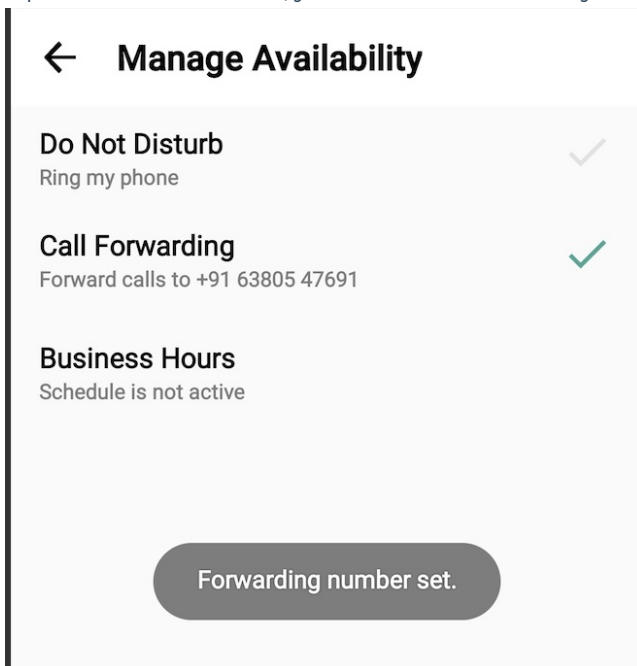
1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Go to **Settings** and tap **Manage Availability**.



3. Tap on **Call Forwarding** to enable it.
4. Enter the forwarding phone number



5. Tap Save. If successful, you'll see the number you set on the screen.




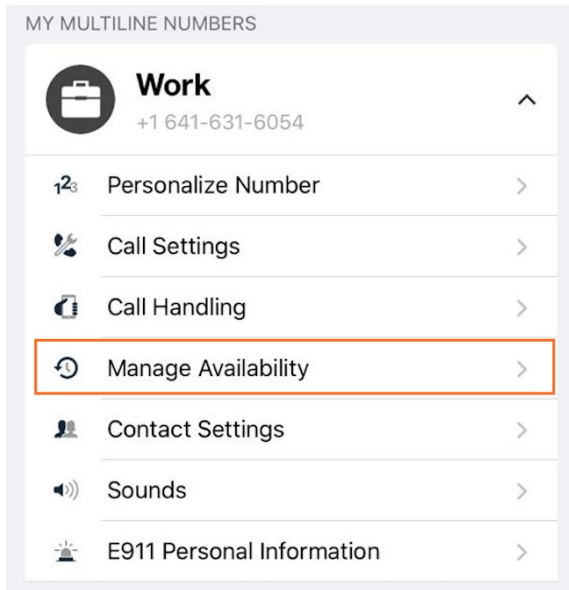
The forward function WILL NOT work if you enter your primary device's number as the call forwarding number.

Set Business Hours

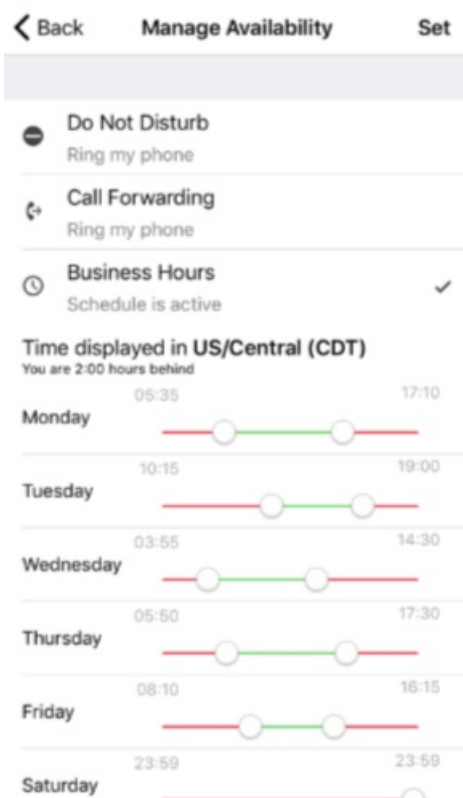
Use Business Hours to set which hours you would like your phone to ring. Outside of those hours,

calls will go to voicemail.

1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Go to **Settings** and tap **Manage Availability**.



3. Tap on **Business Hours** to enable it. *Tap again to disable it.*
4. Use the sliders to set the hours you're available on your MultiLine number. Any incoming calls that are received outside those set hours will automatically be forwarded to your MultiLine voicemail.




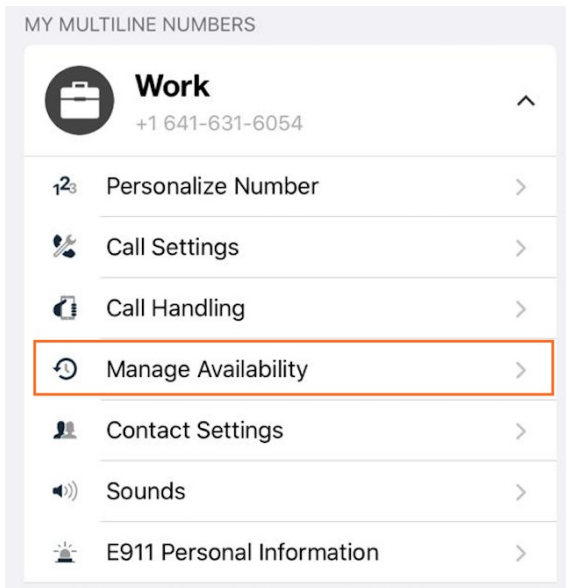
If you are using the **Call Handling** feature to set a list of numbers to simultaneously or

sequentially dial, the **Do Not Disturb** or **Business Hours** settings apply first and the calls will go to your voicemail and not ring the numbers on your **Call Handling** lists.

Set Do Not Disturb

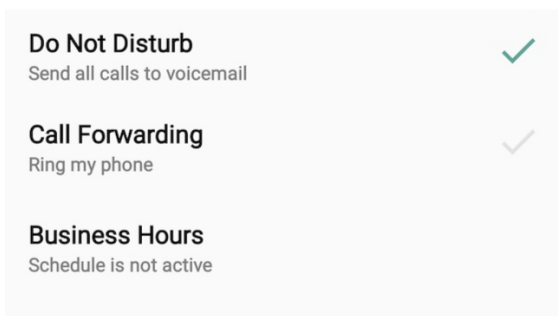
When **Do Not Disturb** is enabled, all the calls will be sent directly to your MultiLine voicemail.

1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Go to **Settings** and tap **Manage Availability**.



3. Tap on **Do Not Disturb** to enable it. *A checkmark will appear and the message will show that MultiLine will send all calls to voicemail. Tap again to disable it. The checkmark will disappear and the message will show that MultiLine will ring your phone.*

Manage Availability



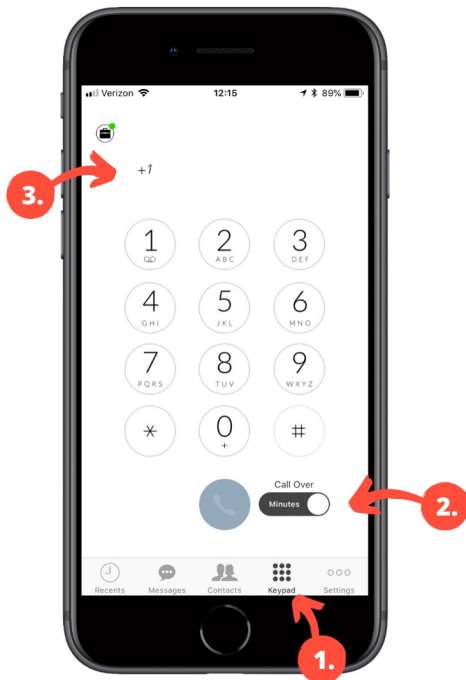
If you are using the **Call Handling** feature to set a list of numbers to simultaneously or sequentially dial, the **Do Not Disturb** or **Business Hours** settings apply first and the calls will go to your voicemail and not ring the numbers on your **Call Handling** lists.

Get started with Calling

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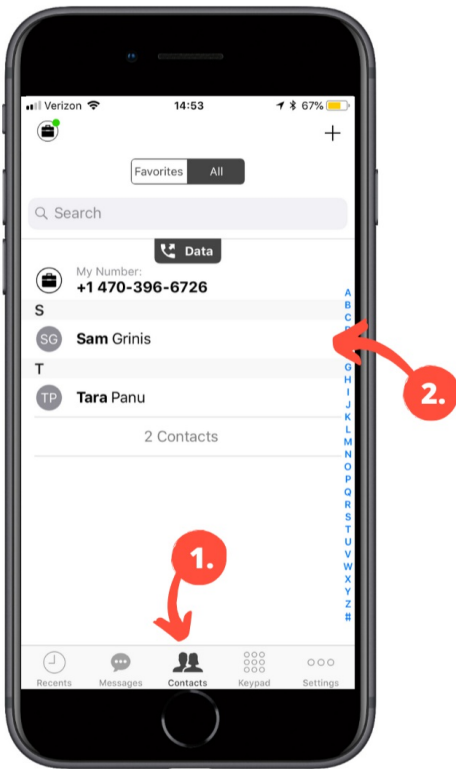
There are multiple ways to place a call in MultiLine: from the **Keypad**, from the **Recents** tab, and from your **Contacts** list.

Make a Call from Your Keypad Screen

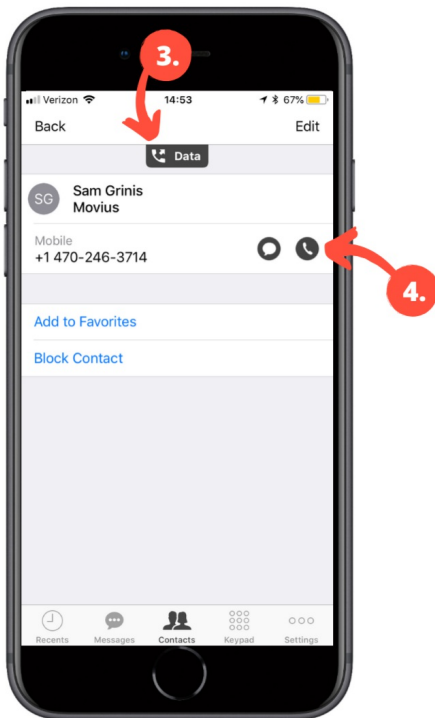


1. Go to your Keypad tab in the navigation bar at the bottom of your screen (iOS) or the bottom right (Android)
2. If you see a toggle, you can choose whether to **make the call over Data or Minutes**
3. Search for a contact or type in a number using the buttons on the screen

Make a Call from Your Contacts Screen

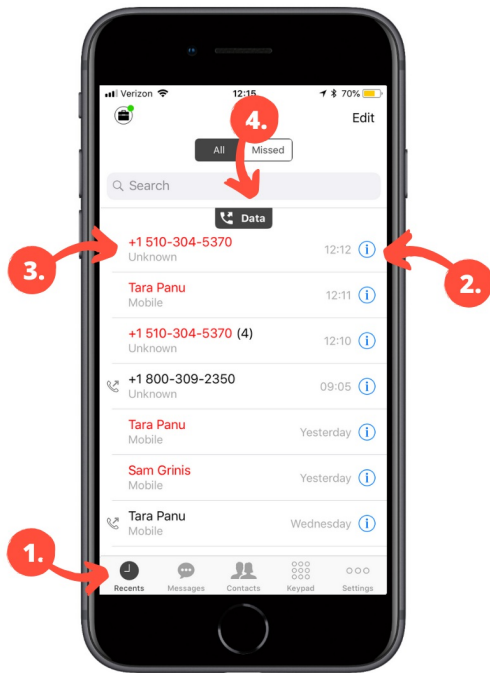


1. Go to your **Contacts** tab in the navigation bar at the bottom of your screen (iOS) or top of your screen (Android) to bring up your Contacts list.
2. Tap a contact.



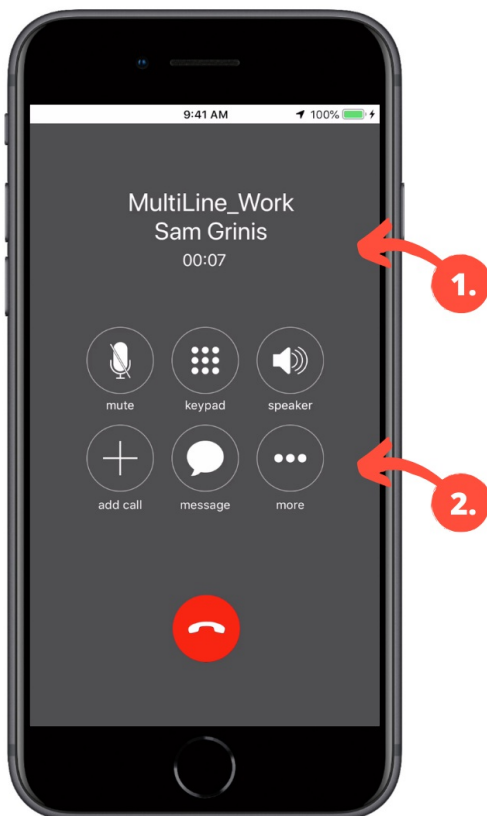
3. If you see this tab, you can choose to **make the call over Data or Minutes**
4. Tap the phone icon to make the call.

Make a call from your Recents screen



1. Go to your **Recents** tab in the navigation bar at the bottom of your screen (iOS) or top of your screen (Android)
2. Tap on the **i** icon to reveal details about that call
3. Tap on the number or contact name to make a call
4. See which connection type over which you will be making the call

Once you've made the call:



1. Check the Caller ID and call duration here

2. Mute your microphone, open your keypad, put the call on speaker, or message the caller and more
-

Get started with Messaging

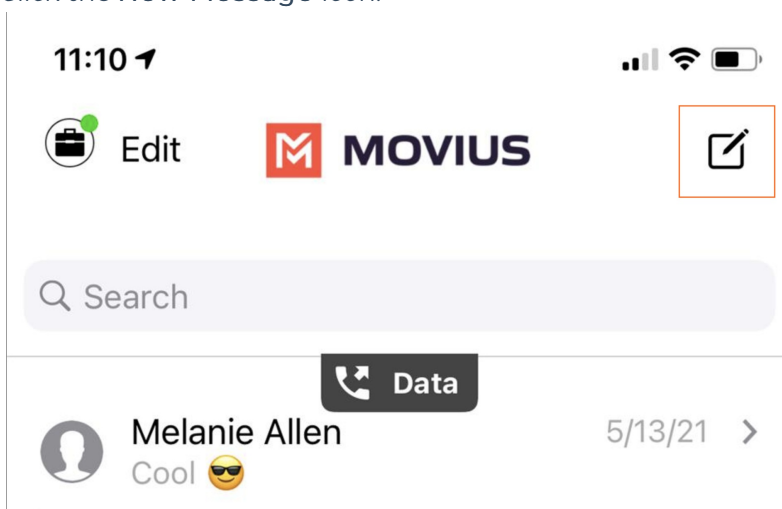
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From the Messages screen, you can see your conversation history and compose new messages.

MultiLine supports group and picture messaging when enabled by your administrator.

How to compose a new SMS (iOS)

1. Go to Messages.
2. Click the New Message icon.



3. Enter a number manually, or type the name of an existing contact
Note: You must type at least 3 numbers or characters before results will appear. Tap a result to send start a conversation with that contact.
Note for Exchange Contacts users: This will not find all the contacts in the GAL, only ones that are stored in the app, or saved as a contact in Exchange. See [Search and Store Exchange Contacts](#) for how to store an Exchange contact.
4. The conversation screen with the contact appears. *Note: If you have never messaged with the contact, this screen will be blank. Later you'll see all the messages exchanged between you and them on your MultiLine number.*

5. Enter your message in the field and tap the Send  icon.

How to reply to SMS (iOS)

1. Go to Messages.
2. Click anywhere on a message to reply.
3. Enter your message in the field and tap the Send icon.

How to compose a new SMS (Android)

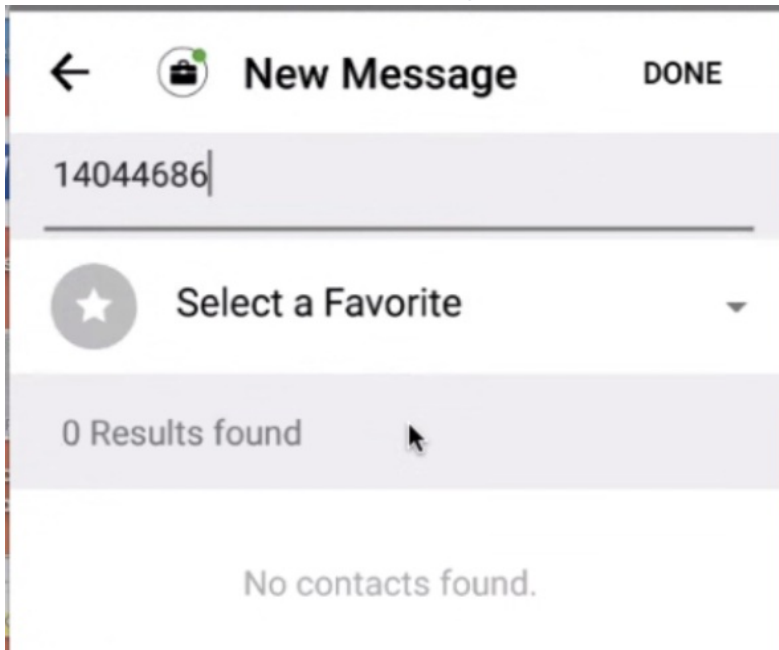
1. Go to Messages.



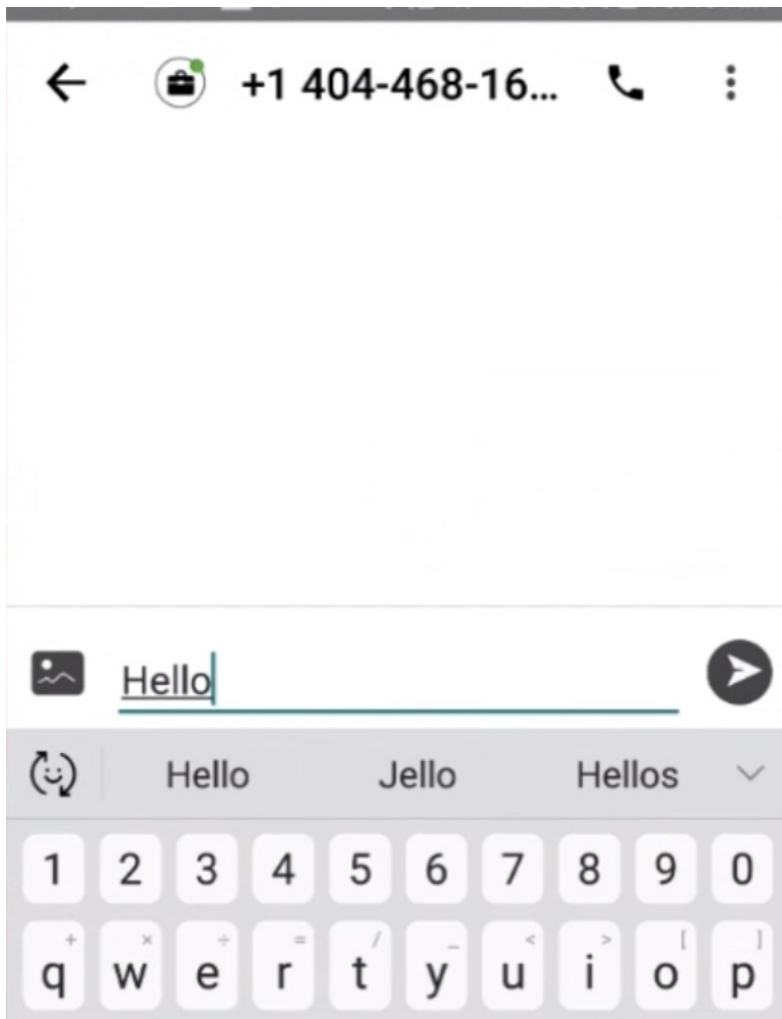
2. Tap the **Message** icon.
3. Enter a number manually, or type the name of an existing contact

Note: You must type at least 3 numbers or characters before results will appear. Tap a result to send start a conversation with that contact.

Note for Exchange Contacts users: This will not find all the contacts in the GAL, only ones that are stored in the app, or saved as a contact in Exchange. See [Search and Store Exchange Contacts](#) for how to store an Exchange contact.



4. The conversation screen with the contact appears. *Note: If you have never messaged with the contact, this screen will be blank. Later you'll see all the messages exchanged between you and them on your MultiLine number.*



5. Enter your message in the field and tap the Send

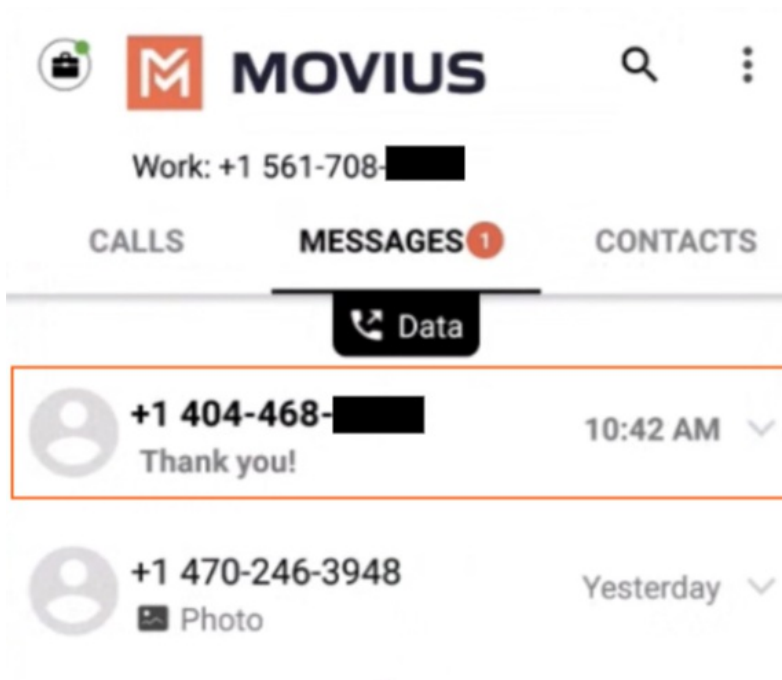


icon.

How to reply to SMS (Android)

1. Go to Messages.

Note: If you see an orange icon with a number indicates that you have that many Message Logs with new messages. The Message Logs with new messages will be in bold.



2. Tap your reply in to the field and tap the Send



icon.

Get consent to message using Opt-In flow

Last Modified on 11/03/2021 7:29 pm EDT

Read this to learn how the Opt-In Flow collects consent for MultiLine users to send SMS or instant messages to users.

Overview

Many regulated users must get consent from their clients to start text messaging conversations. MultiLine automates this process for you, ensuring that any time you are messaging with a number for the first time that your organization will collect their consent to be sent messages.

Before you start

- Your organization determines whether you have SMS Opt-In turned on.
- Using WhatsApp Messaging Connector requires Opt-In.

SMS Opt-In Flow

- Default messages are provided in the scenarios below. Your organization may configure the messages differently.
- You or the client can initiate the opt-in flow.

MultiLine User initiates the Opt-In Flow

When you try to message a client at a number that you haven't messaged with previously, the customer will receive a notification message requesting they accept or reject the Opt-in process.

- **Default:** [Auto Message] is trying to reach you. As per company policy, you must provide your consent to continue messaging. To Opt in, reply YES. To opt out, reply STOP.
- **Note:** will show your name as it was submitted by the MultiLine Admin in the MultiLine Management Portal.

You will also see a message letting you know the customer has been requested to accept the Opt-in.

- **Default:** [Automated Message]: Your contact has been sent a request to Opt-in. Once they accept, you will be able to message with your contact.

When the customer accepts the opt-in request by replying to the message with YES, you'll receive a notification letting you know you can begin messaging with each other.

- **Default:** [Auto Message]: Your Contact has opted in. You may continue to send/receive messages.

The customer will also receive a notification letting them know you can begin messaging with each other.

- **Default:** [Auto Message]: Opt in confirmed. If you wish to opt out at any time, reply STOP

Opt-Out Flow

The client can choose to reject messaging at any time by replying to the message conversation with STOP.

If the client opts out, you'll see a notification letting you know you can no longer message with the client.

- **Default:** [Auto Message]:Your contact has opted out. No further messages can be sent to this contact until they have provided their consent again.

The client will also see a message letting them know they have successfully opted out and how to undo their decision, if desired.

- **Default:** [Auto Message]: Opt out confirmed. If you change your mind, please reply with a new message.

Client initiates the Opt-In Flow

When a client tries to message you first, and you haven't messaged together previously at that number to establish opt-in, the client will automatically see a notification message. The notification is a request to accept or reject the Opt-in process.

- **Default:** [Auto Message] You are trying to reach . As per company policy, you must provide your consent in order for your message to be delivered. To opt in, reply YES. To opt out, reply STOP.
- **Note:** will show your name as it was submitted by the MultiLine Admin in the MultiLine Management Portal.

You will also receive a notification letting you know that the client has tried to contact you.

- **Default:** [Auto Message] A contact has attempted to send you a message. As per company policy, they have been sent a request to opt in. Once confirmed, you will be able to send/receive messages.

When the customer accepts the opt-in request by replying to the message with YES, you'll receive a notification letting you know you can begin messaging with the customer.

- **Default:** [Auto Message] Your Contact has opted in. You may continue to send/receive messages.

The customer will also receive a notification letting them know you can begin messaging with each other.

- **Default:** [Auto Message] Opt in confirmed. To opt out at any time, reply STOP. Note: Employee name is a variable, and will be picked by the system.

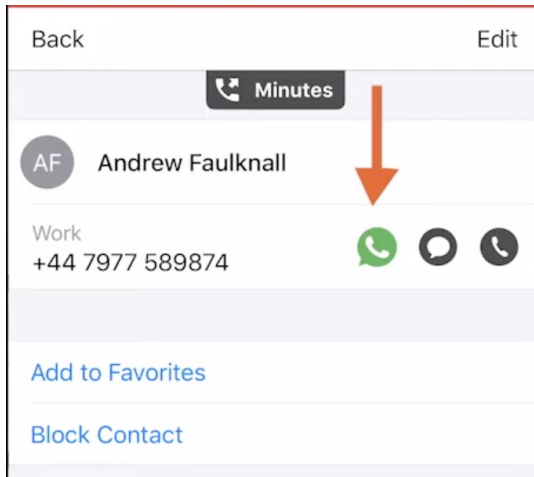
WhatsApp Opt-In Flow

Refer to this topic to learn what to expect when you initiate a new WhatsApp conversation.

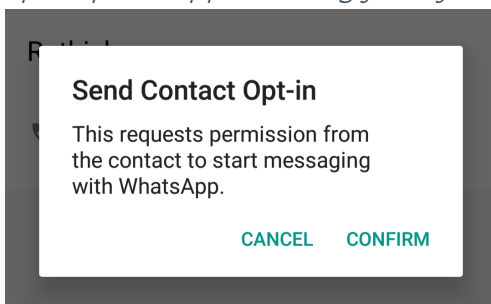
You can only send WhatsApp messages to users in your contacts. If you need help setting up your contacts, see [Add Contacts](#).

When you try to send a message to a client with WhatsApp for the first time, you're required to get consent using an Opt In process.

1. To start a new WhatsApp conversation, find your contact and click the WhatsApp icon.



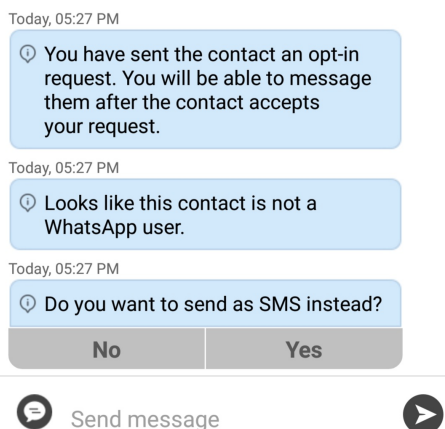
1. A prompt will appear asking you if you'd like to send the contact an Opt In message.



2. Click **Confirm** to send the Opt-In. There are four possible outcomes:

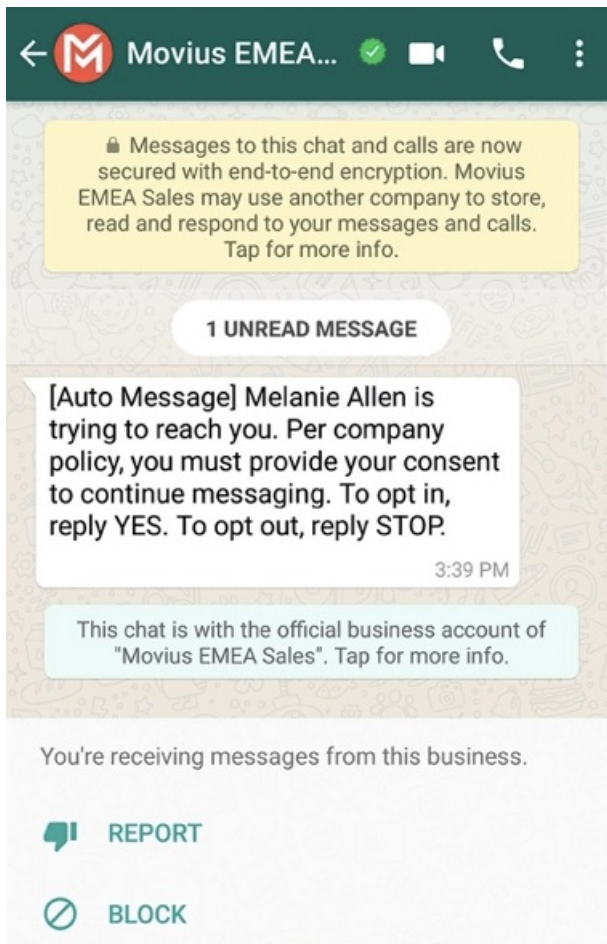
1. *Contact doesn't have WhatsApp*

1. You'll see a message letting you know your contact isn't a WhatsApp user, and ask if you'd like to send an SMS instead.



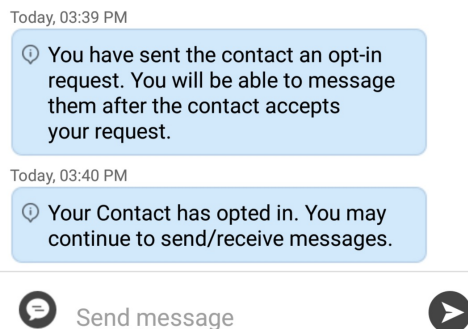
2. Select **Yes** to go to the SMS message screen. Select **No** to return to contacts.

2. *Contact has WhatsApp- customer receives opt-in request*

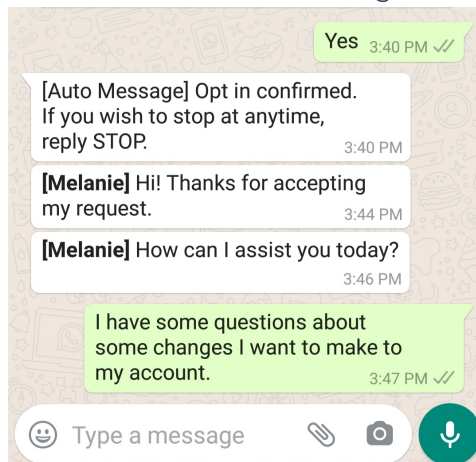


1. *Contact accepts Opt-In request*

1. You'll see a confirmation message letting you know the contact has chosen to opt-in.

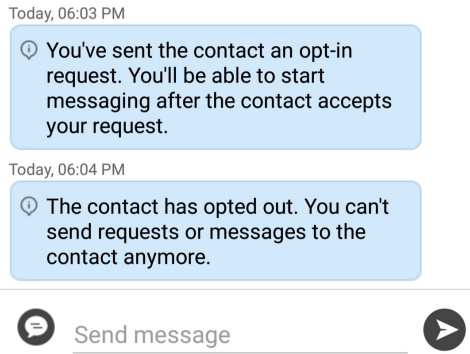


2. Your contact will see a message letting them know they've opted-in.



2. Contact rejects Opt-In request

1. If your contact rejects the Opt-In, you'll see a message letting you know. The message templates and send message field will be disabled for the contact.

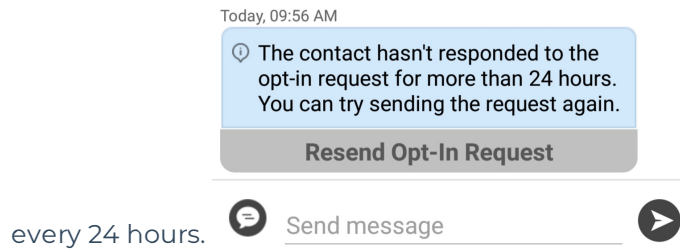


2. The customer will be informed of their Opt-Out status, and that it is possible to Opt-In at any time by replying "yes".



3. Contact doesn't respond to Opt-In request

1. If your contact doesn't respond to the Opt-In, you'll be able to send a new one



Get started with Contacts

Last Modified on 11/03/2021 7:22 pm EDT

Overview


- The MultiLine app provides you a separate contact list to use to make your business calls. We offer three options for starting your Contacts list:
 - Exchange Contacts: connect to an Exchange server, such as Outlook or BlackBerry Exchange; two-way sync means contacts added or updated in MultiLine or Exchange server will update both lists.
 - Local Contacts: manually add contacts in a list that exists only within the MultiLine app.
 - Native Contacts: sync with the Contacts app on your personal device or within the EMM container; two-way sync means contacts added or updated in MultiLine or Contacts app will update both lists.
- Once you set up your Contacts list, any contacts will appear on the Contacts screen. You can:
 - Tap a contact to see options for calling and messaging them
 - View, add, and update contacts

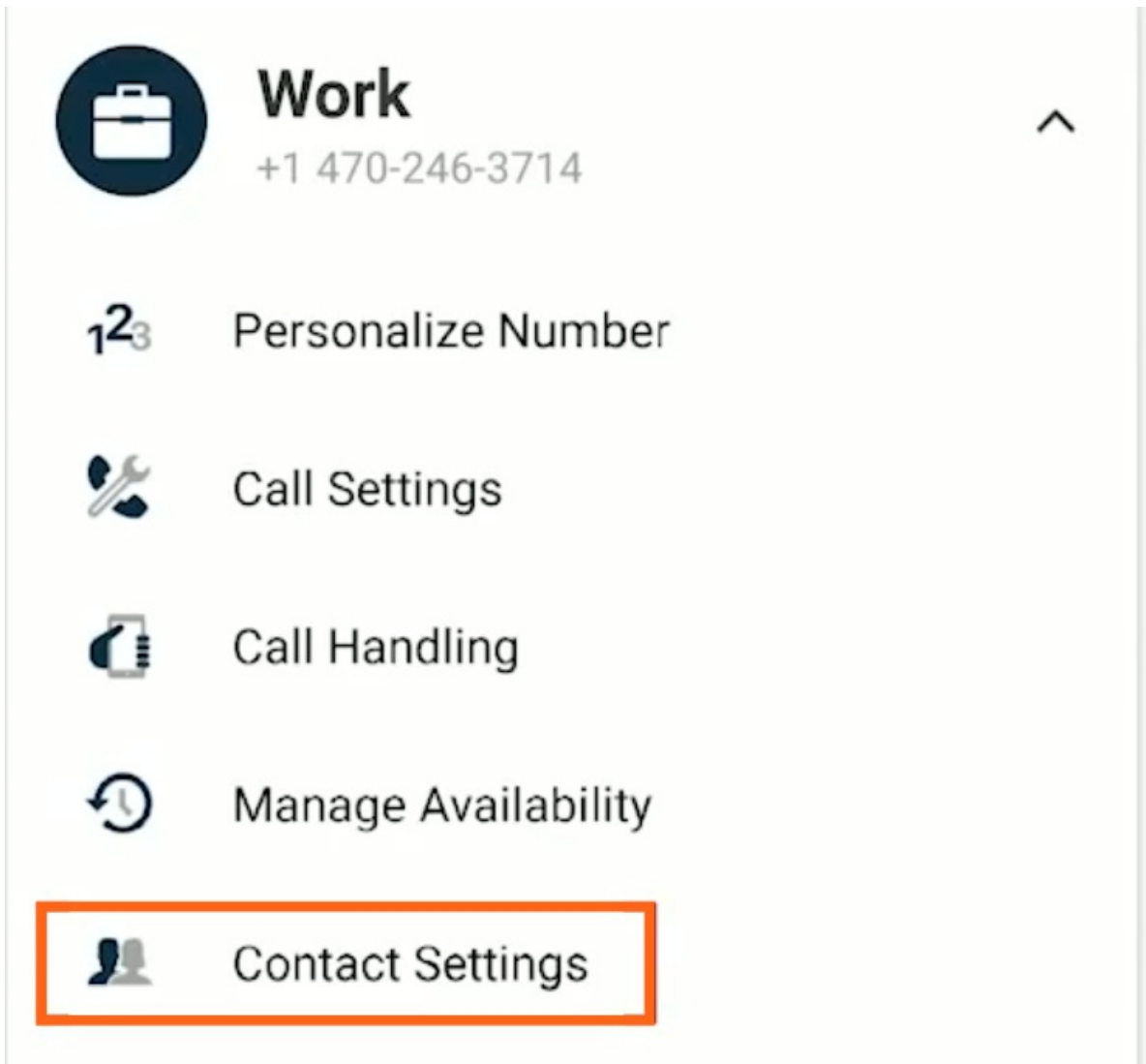
Before you start

- If your organization chooses to restrict the type of Contacts setting you can use, you may not see certain Contact Source options.
- We recommend Exchange Contacts for the best experience with MultiLine Desktop.

How to choose your Contact Setting

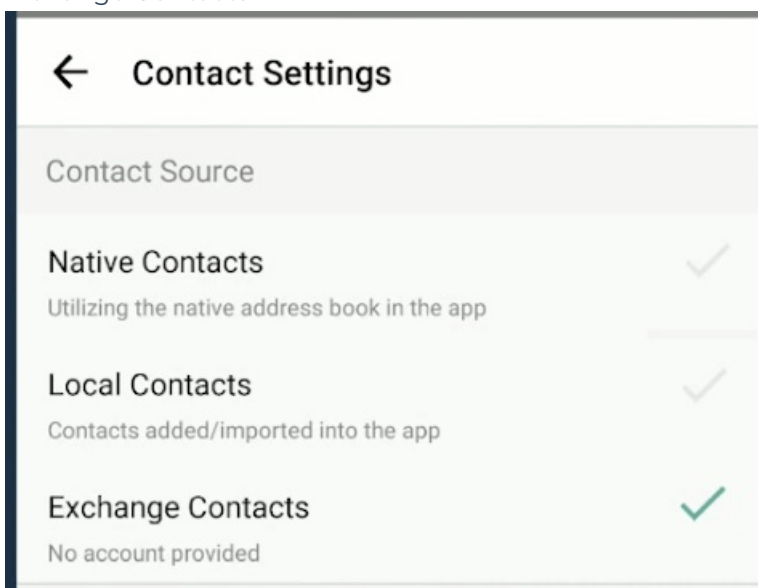
You have options for sourcing, sorting, and displaying contacts. You'll need to choose your **Contact Source** in **Contact Settings** before you begin adding contacts.

1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap **Settings**.
3. Tap **Contact Settings**.



Select your chosen contact source:

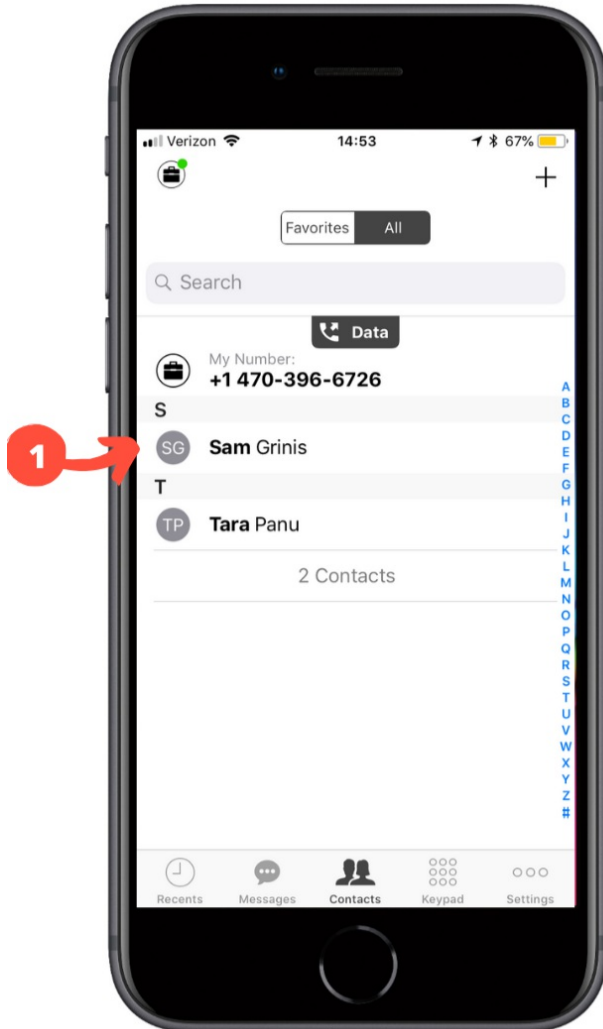
- Native Contacts
- Local Contacts
- Exchange Contacts



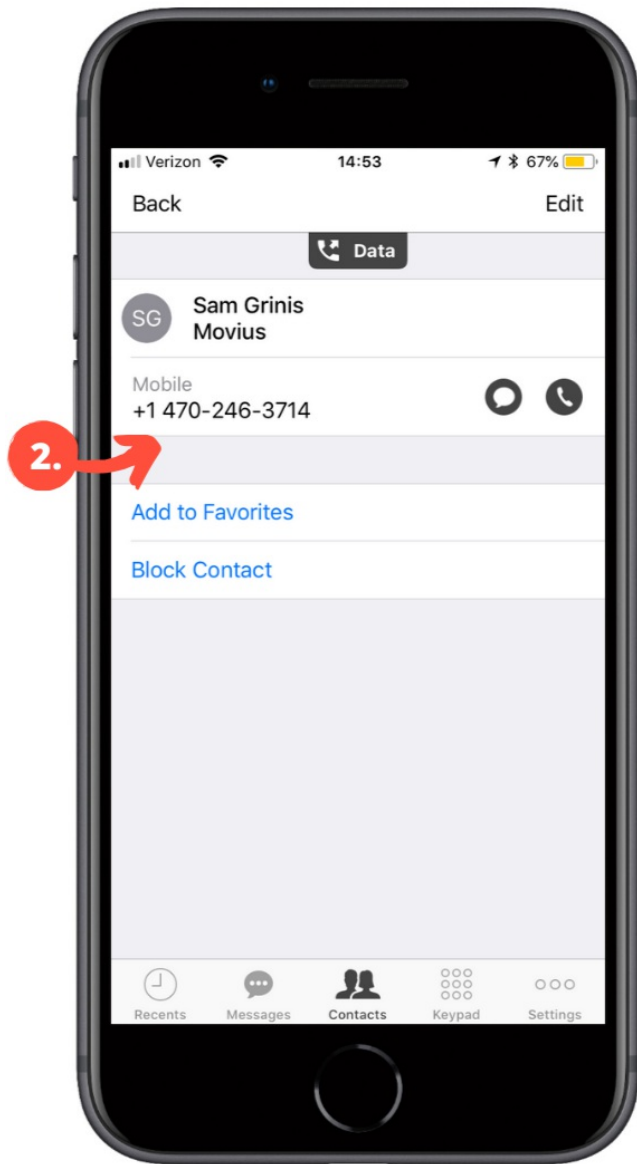
View a contact

To view, edit, delete, or message contacts, you must have at least one contact.

1. The **Contacts** tab displays all contacts in alphabetical order by default.



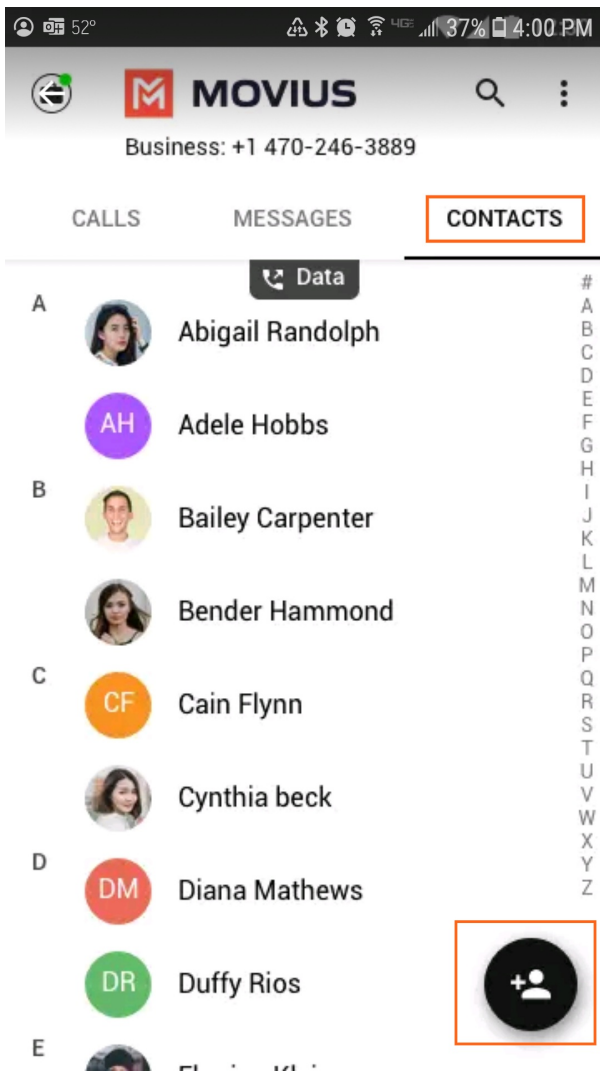
2. Clicking on any contact will bring you to that contact's information page, where you can call, message, favorite, or block the contact.



3. Clicking on the **edit** button in the top right-hand corner allows you to choose to delete or edit, the selected contact.

Add a contact

It's easy to add contacts in the MultiLine application.



1. Go to the **Contacts** tab.
2. Click the **Add Contact** button.
 - Fill out as many details as desired:
 - First name
 - Last name
 - Phone
 - Email
 - Address
 - Clicking "Add Phone field", "Add Email field", or "Add Address field" will let you associate multiple phone numbers, email addresses, and addresses for the contact. You can choose labels for each field.

During onboarding, you should have chosen your Contact Settings, your contacts will either be sourced from an Exchange server, your native device, or locally in MultiLine. See below for details on how adding contacts works for the different settings.

Add a contact - Using Exchange server

- Using the **Exchange Contacts** option means MultiLine gets your contacts from a corporate exchange database.
- Any changes made to the corporate exchange (adding, renaming, deleting, etc.) will automatically be reflected in the MultiLine app and vice versa.

- You'll be able to search for any contact from the Global Address List (GAL), your company's list of all employees. However, the full GAL will not show up in the list of contacts for performance reasons.

Add a contact - Using native device

- Using the Native Contacts option means MultiLine uses the same contacts list as your native phone.
- Any changes made to your native Contact List (adding, renaming, deleting, etc.) will be reflected in MultiLine and vice versa.

Add a contact - Using local contacts

- This is the default contact setting.
- Using the Local Contacts option means your contacts exist within the MultiLine app only.
- You can choose to do a one-time import from your native device and/or manually add contacts yourself.
 - Changes made in MultiLine (adding, renaming, deleting, etc.) will NOT be reflected in your native contact list, and vice versa.
 - There is no automated syncing between the Native and Local Contact Lists.

NOTICE: Local Contacts aren't backed up or stored outside the application, so they can be lost if you lose your device or need to reinstall MultiLine.

*NOTICE: if you create your Contact List using Local Contacts, and then switch your source to Native or Exchange, the contacts you created **will be deleted**.*

Update contact with a new number

If you have a contact that calls you from a new number you can update that contact with the new number.

iOS

1. Go to **Calls**.
2. Tap the blue information icon for the unknown number.
3. Tap **Update**.
4. Enter the name or number of the existing contact you want to update.
5. The new number will be added.
 - From this screen you can change the label, if desired.
 - If you need to delete the previous number, tap the x and confirm.
6. Tap **Save**.

Android

1. Go to **Calls**.
2. Tap the down arrow for the unknown number.
3. Tap **Update**.
4. Enter the name or number of the existing contact you want to update. *Note for Exchange Contacts users: this does not search the entire GAL.*
5. The new number will be added.

- From this screen you can change the label, if desired.
 - If you need to delete the previous number, tap the x and confirm.
6. Tap **Save**.

Add a Favorite contact

You may want to add contacts that you're in touch with more frequently to your favorite contacts. This makes it easier to start new calls or messages with them.

To add a contact to your favorites

1. Go to the **Contacts** tab.
2. Click your contact to open the **Contact** details.
3. Click the **Star** in the upper right-hand corner.

After you've added a contact to your contacts, you will see the Star on their icon.

Get started with MultiLine Voicemail

Last Modified on 11/03/2021 7:22 pm EDT

Read this to learn how to record your voicemail greeting and listen to voicemails.

Overview


The MultiLine application provides you a separate voicemail to use for your business calling.

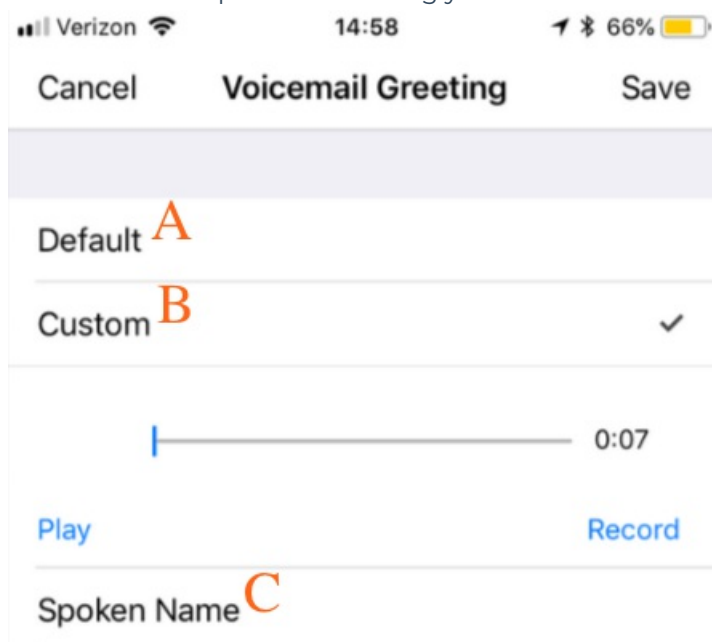
Before you start

- You need to be connected to the internet when updating your Voicemail greeting.
- Your organization can turn off voicemail features. If so, you may not see all the options described here.

Record your Voicemail greeting

Use **Voicemail Greeting** from the **Settings** menu to set up a voicemail greeting. You have three options: the default message, a custom message, and a message that includes audio of you speaking your name.

1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap **Settings**.
3. Tap **Voicemail Greeting**.
4. You have three options for setting your Voicemail Greeting:



A. **Default**: This application comes with a default setting that callers will hear when leaving a voicemail. For an example MultiLine number "+15555555555", the greeting is "You have reached +15555555555, please leave your message after the tone".

B. **Custom**: Allows the user to set a customized voicemail greeting. Once you have recorded a voicemail greeting, you can hit **Play** to listen to it, or **Record** if you want to re-do it. This can be done or redone at any time.

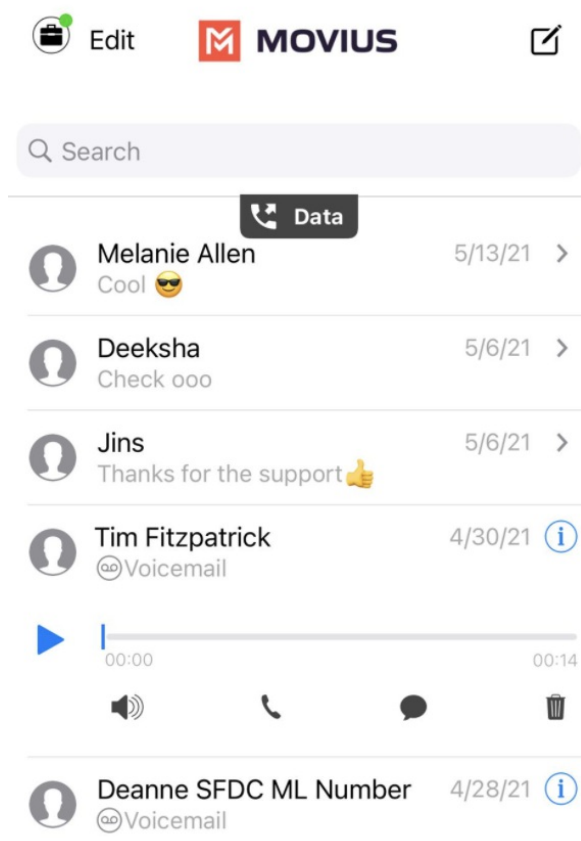
C. **Spoken Name**: Allows the user to record their name. Once you have recorded your name, you can hit **Play** to listen to it, or **Record** if you want to re-do it. This can be done or redone at any time.

Listen to Voicemails

Movius MultiLine has embedded voicemail allowing callers to leave a message.

iOS

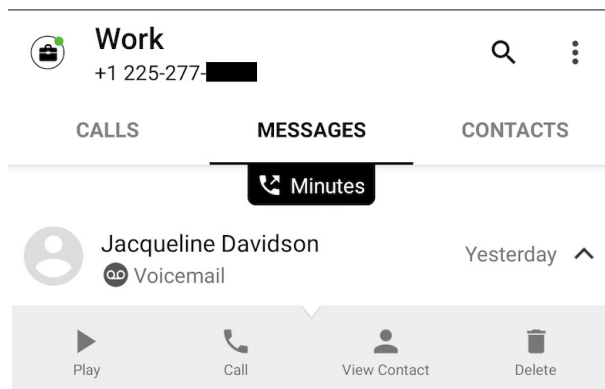
1. Go to the Messages tab.



2. Voicemail messages are indicated by Voicemail icons. Tap anywhere to expose the options.
3. Click the **Play** icon to play the message.
 - The speaker icon lets you play the Voicemail on speaker phone.
 - The phone icon lets you call the party back.
 - The speech bubble icon lets you message the party back.
 - The trash icon lets you delete the message.
 - The info icon will pull up the Contact Details page, where you can see history with the contact or WhatsApp message the party back.

Android

1. Go to the Messages tab. *Voice messages are indicated by a voicemail icon.*



2. Click the menu down arrow to expose the options.
3. Click the **Play** icon.

You can also call back, message back, view contact (see call history and Whatsapp message back) or delete the voicemail from this screen.

Get started with WhatsApp Messaging Connector

Last Modified on 10/31/2021 9:09 pm EDT

Read this to learn about WhatsApp Messaging Connector

Overview

The WhatsApp Messaging Connector allows compliant WhatsApp messaging directly inside MultiLine.

- MultiLine users can send WhatsApp messages to contacts, and they can read and reply to WhatsApp messages on the MultiLine messages screen alongside SMS and Voicemail messages.
- WhatsApp users receive messages from the MultiLine user as coming from an official WhatsApp business account.

Benefits

- Engage with clients on their preferred consumer messaging channel
- Help unify and bring together mobile voice and multiple messaging channels in a single, convenient user experience
- Ability to record and archive all conversations over voice, SMS, and WhatsApp within MultiLine for surveillance and compliance
- All conversations are captured and can be automatically be sent to existing compliance archive and logged inside CRM

Features

- Call, SMS and WhatsApp – all within MultiLine app
- Shared messages inbox containing SMS and WhatsApp messages threads
- Supports one-to-one messaging between MultiLine App and external WhatsApp users
- Enforce mandatory opt-in from WhatsApp user
- MultiLine app detects if WhatsApp is not enabled for the receiving user and offers an option to send SMS
- Supports data loss prevention feature with ability to redact or block WhatsApp messages as per business defined policy
- Optional recording of all WhatsApp messages (with recording add-on)
- Support for iOS and Android

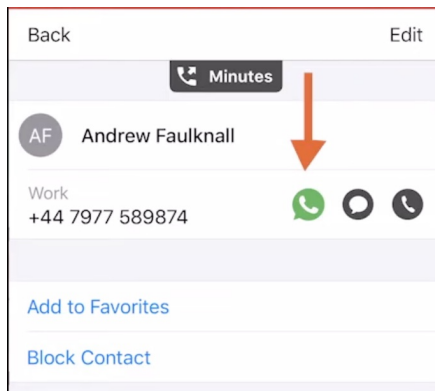
Before you start

- Your organization has to enable WhatsApp Messaging Connector for it to be available in MultiLine. If not, you won't see the green WhatsApp messaging icon.

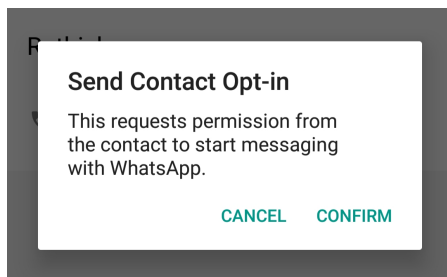
How it works

Step 1: MultiLine user sends the first message to WhatsApp user from MultiLine.

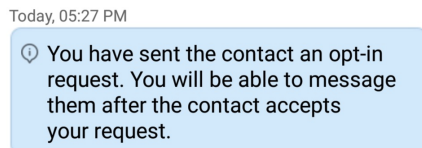
User clicks WhatsApp message icon:



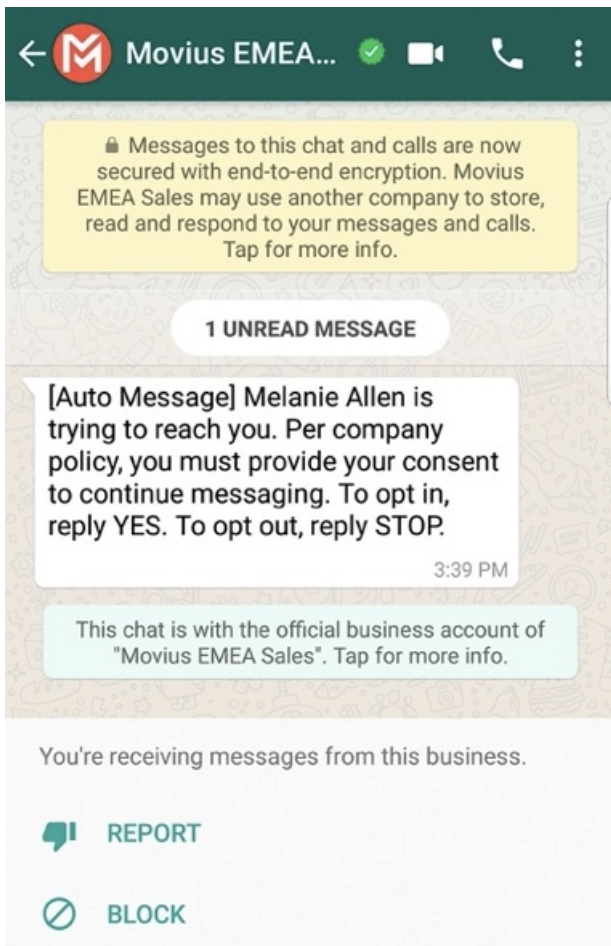
MultiLine asks if the user would like to send the opt-in message:



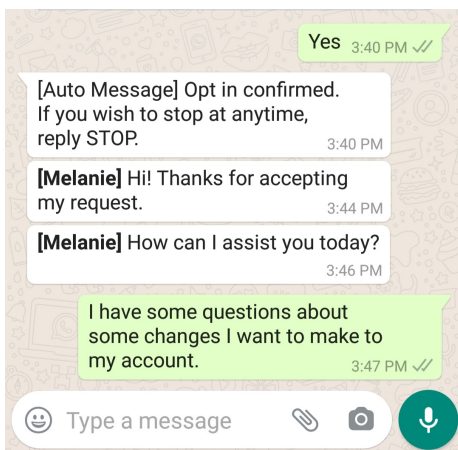
MultiLine sends the opt-in message:



Step 2: WhatsApp user receives a mandatory opt-in message that lets them know the MultiLine user wants to chat.



Step 3: If accepted, a 24 hour conversation session begins. The users can freely message each other.



Step 4: Starting a new conversation session

WhatsApp users may always start new conversation sessions by sending a message. To prevent spam, after a 24 hour lapse of conversation, as a WhatsApp business account user, the MultiLine user must re-initiate conversations using pre-approved template messages. These messages are evaluated ahead of time to make sure they abide by WhatsApp Business policies.

Today, 10:13 AM

🔔 The contact hasn't responded for more than 24 hours. Please use the template button in the bottom-left to select a message to send.

✕ Send message ▶

I'm sorry that I wasn't able to respond to your concerns yesterday but I'm happy to assist you now. If you'd like to continue this discussion, please

I've emailed you the documents to complete. Please fill them out and send back to us as soon as you can. Let me know if you see it, or need me to re-

Just wanted to let you know to check your email for some important documents. Please fill them out and send back to us as soon as

Comparison to other available options

- *Background Recording Agents* snoop on all data and network traffic on the user phone. Our WhatsApp Connector respects the user phone privacy and never accesses private use of the phone.
 - *Modified WhatsApp apps* are unapproved clones that add the recording feature. Our WhatsApp connector is approved, and abides by all WhatsApp policies.
-

Get started with Movius for BlackBerry

Last Modified on 10/31/2021 9:19 pm EDT

Read on to learn the Movius for BlackBerry's unique integration features.

Overview

Movius for BlackBerry is a MultiLine mobile app that specially integrates with BlackBerry UEM.

Before you start

- To learn how to activate and set up your app, refer to the MultiLine Getting Started Guide.
- This guide assumes the BlackBerry administrator is using our recommended settings to enforce separation of business and personal.

Dynamics Launcher Integration

The Movius for BlackBerry client is registered with the BlackBerry Dynamics Launcher, therefore, appearing in the list of available Dynamics apps when the user hits the blue floating launcher button to open the Dynamics Launcher overlay screen.



BlackBerry Exchange Contacts

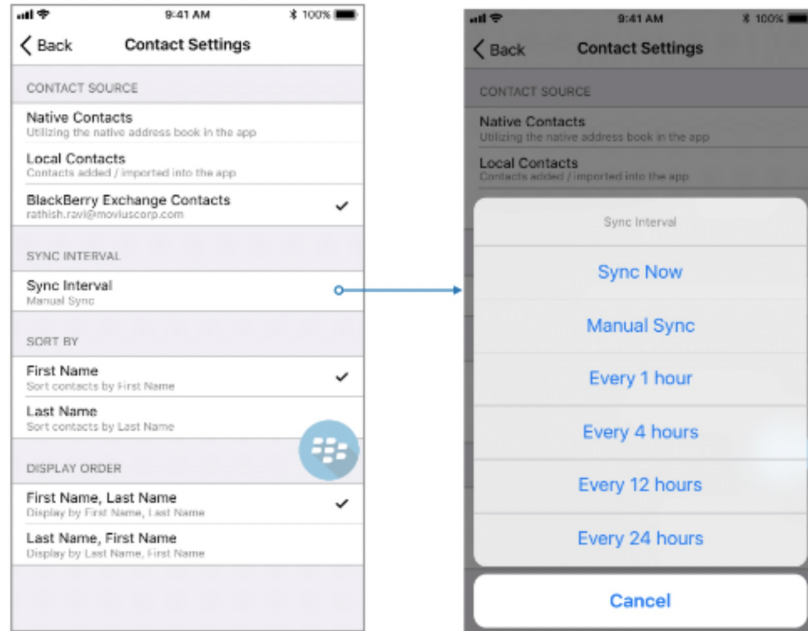
Most Movius for BlackBerry users will use BlackBerry Exchange Contacts.

1. Tap the menu icon  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap Settings.

3. Tap Contact Settings.

4. Tap Exchange Contacts.

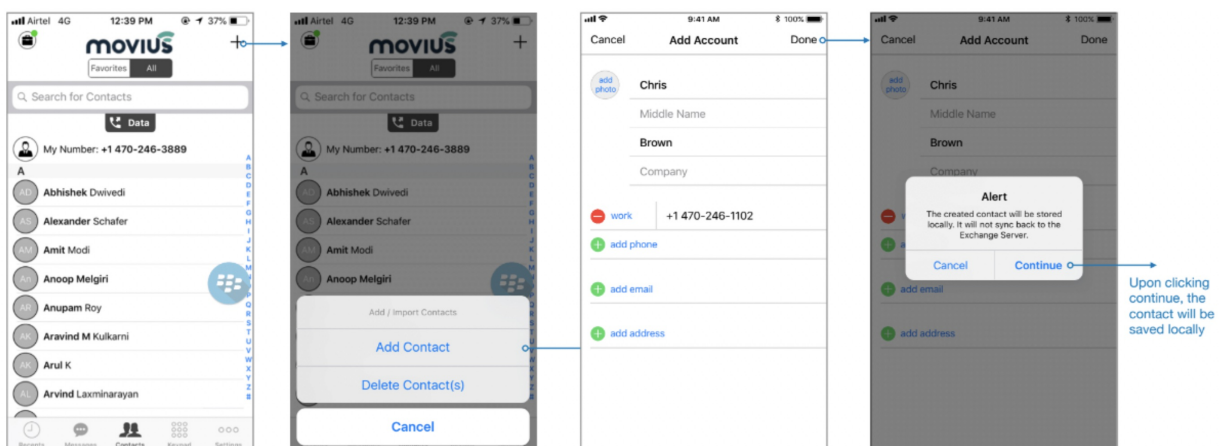
- Once you select BlackBerry exchange contacts the sync will begin and you'll soon have access to your contacts.
- If you'd like to change how often your contacts sync with the exchange server, tap **Sync Interval** and choose your preference.



Note: If you created contacts while using Local Contacts or Native Contacts before switching to Exchange, these contacts will be deleted.

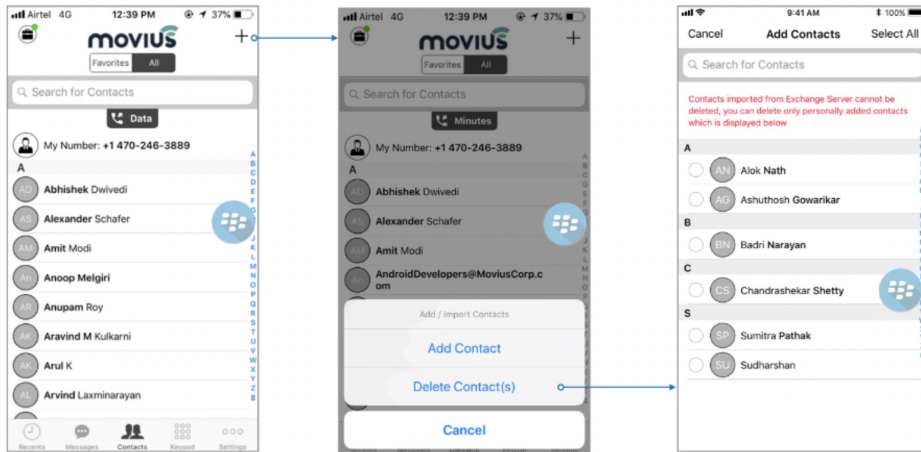
Add contact

If you add a contact on your device locally it won't be synced or created on exchange server. You can modify locally added contacts in Movius for BlackBerry but cannot modify imported contacts.



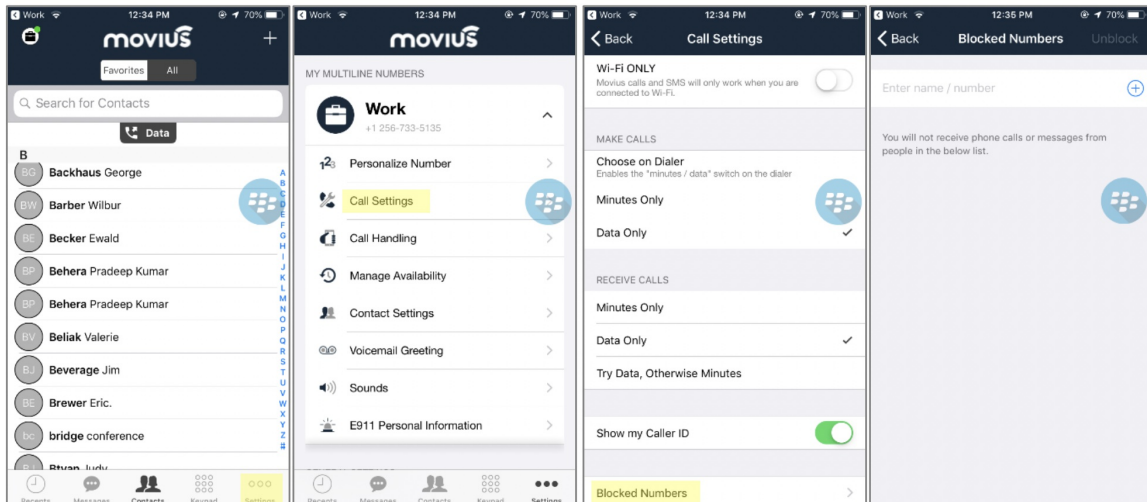
Delete contact

If you try to delete a contact from Movius for BlackBerry, the client will show an error message. You can't delete an imported contact; only locally saved contacts.



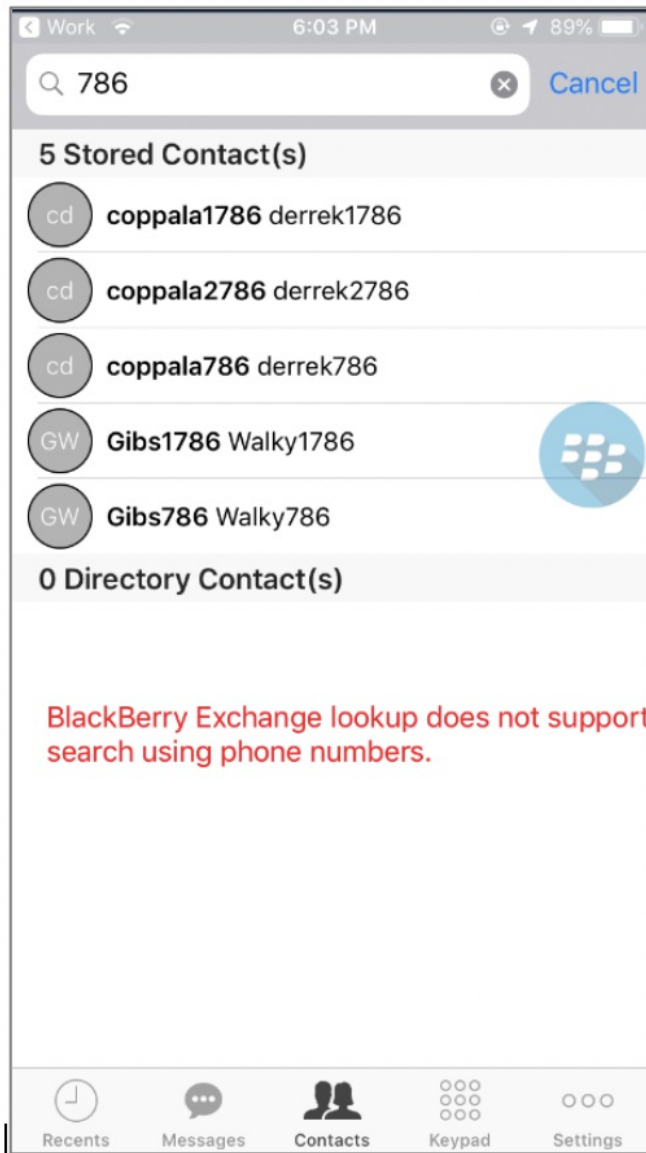
Block contact

You can add a contact (local/exchange) or a number to the Blocked Number list. You won't receive any calls or messages from the blocked number.



GAL Look up

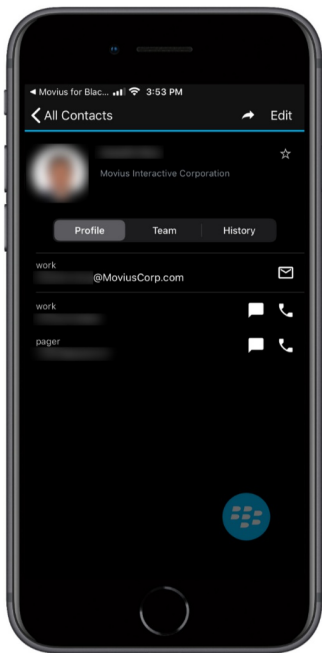
Global Address List (GAL) doesn't allow search for a contact by contact number. If you search for a contact using a number, you'll see a notification message. You can search for a contact using First Name, Last Name, Display Name, Full Name, Alias and Email fields.



Call or text contact

Calling or texting a Contact using the Movius for BlackBerry client directly from the BlackBerry Work Contacts application:

Open a BlackBerry Work Contact and hit the phone number for that contact, or the phone icon beside the number. The Movius for BlackBerry client will call the number directly; as shown below:

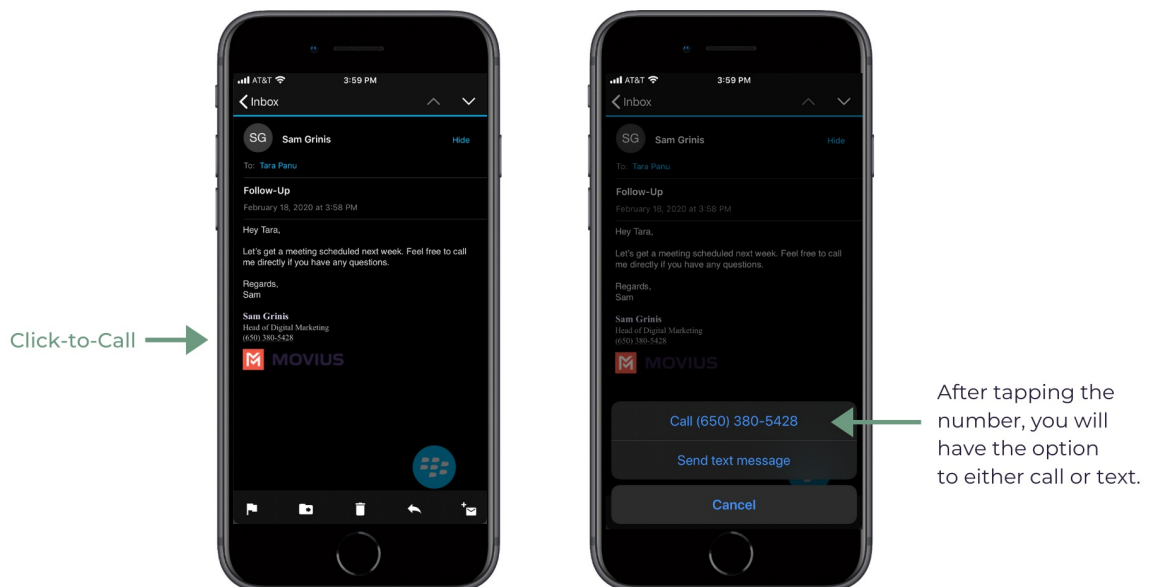


Tapping the message bubble icon beside a contact/number will open the Movius for BlackBerry client to the draft message screen to allow the user to type a message and tap send.

BlackBerry Work Email Integration

When BlackBerry Work recognizes a phone number in an email, it turns the number into a link.

- Tapping on a recognized phone number in a BlackBerry Work email prompts the user to choose to call or text the number.



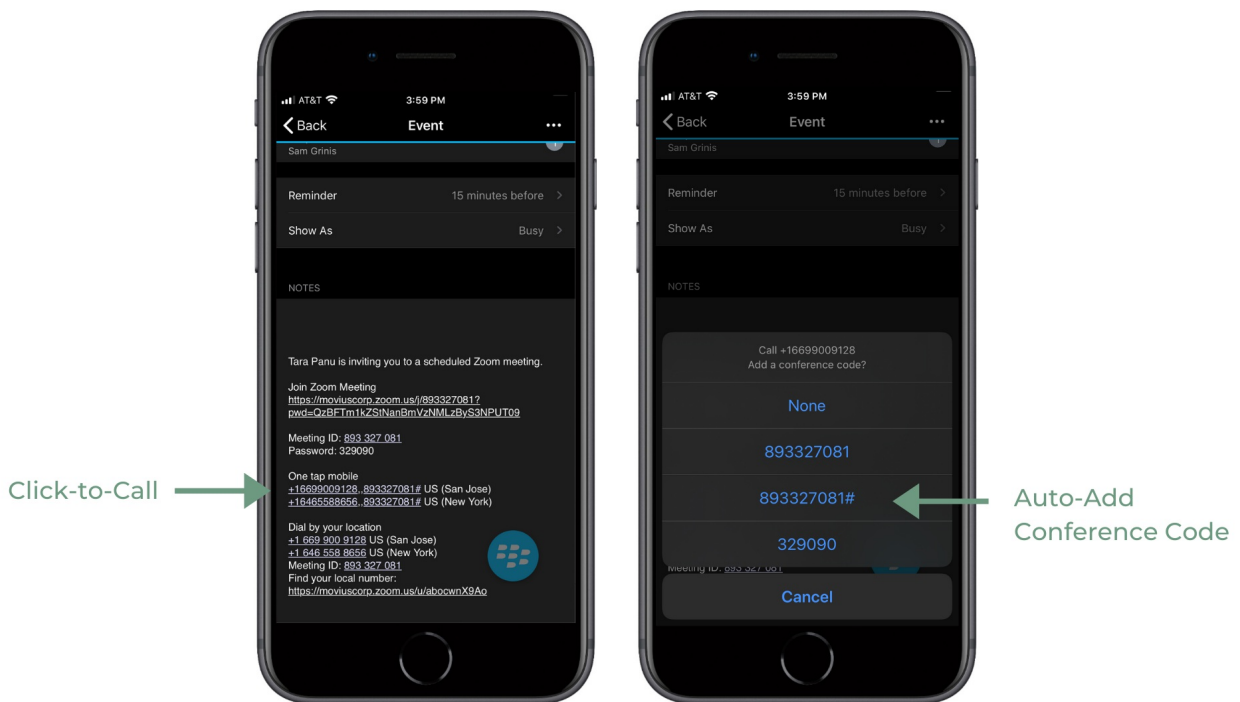
- If you choose call, the client will open and make a call to the number.
- If you choose text, the Movius for BlackBerry client will open to the draft message screen to allow you to type the message and tap **Send**.

BlackBerry Work Calendar integration

Calling a phone number directly from a BlackBerry Work Calendar invitation is supported with Movius for BlackBerry.

When opening a BlackBerry Work Calendar event, if BlackBerry Dynamics recognizes a number within the event details as a phone number, it will be underlined and stylized as blue text.

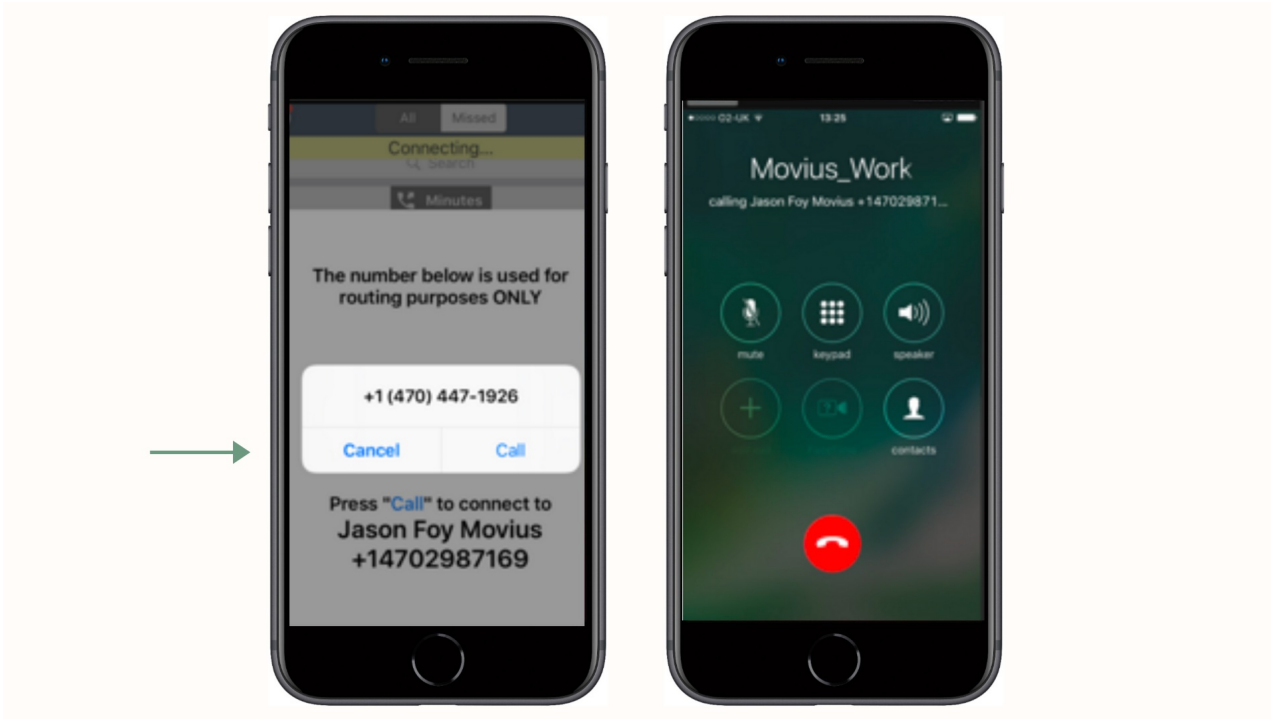
If the user clicks directly on the phone number, they will be prompted to choose whether they want to make a call or send a text.



- When choosing to make a call, the call is made directly using the Movius for BlackBerry client:
- When choosing to send a text, the user will be taken directly to the draft message screen in the Movius for BlackBerry client.

Minutes Calling

If the Movius for BlackBerry client is configured to make calls using minutes, when choosing Movius for BlackBerry, the UI will display the relationship number in the call box. This is not a mistake! This relationship number is how the Movius application routes your call to the intended number using minutes. Calling this assigned relationship number will allow the call recipient's caller ID to show your MultiLine number, as with a VoIP call.



Get started with MultiLine for Intune

Last Modified on 10/31/2021 9:19 pm EDT

What is MultiLine for Intune?

MultiLine for Intune is a secure, carrier-agnostic business application that enables employees to compliantly communicate with external clients through a separate business number on their own personal devices, specially built to be managed by Microsoft Intune. This version of MultiLine allows IT and mobility managers to secure their client communication data while ensuring employees are not using their personal number or other consumer messengers for business communications.

MultiLine for Intune works over any iOS/Android device and can be deployed over any global carrier. MultiLine's patented technology allows employees to make and receive calls on their business number over WiFi, mobile data and/or GSM (not VoIP-only) ensuring employees are always accessible and connected with their clients no matter where they work.

- **Authenticate the same way you do other Work apps**

- Access MultiLine with the corporate credentials you use for Outlook or Office 365.
- If applicable, download MultiLine from corporate-protected App or Play store.

- **One-click sync to Exchange contacts**

- MultiLine for Intune automatically detects the Exchange contacts associated with your email ID.

- **Automatic phone number recognition**

- Whenever a phone number appears in your managed apps—within an SMS or messaging program, in an email, in the browser, the number will be rendered as a clickable link. Tap the link and the MultiLine for Intune call screen will automatically appear to make the call.
-

Get started with Salesforce Connector

Last Modified on 11/03/2021 7:12 pm EDT

Read this guide to learn how to use MultiLine Salesforce connector.

Overview

MultiLine Salesforce Connector offers seamless merging your MultiLine application into Salesforce CRM. With this integration, you can:

- communicate to your customers within Salesforce.
- make/receive calls and exchange text messages with your customers using your MultiLine number.
- automatically track all communications with your customer thus eliminating the need to manually log calls and texts.

This saves time and reduces human error compared to manual logging. MultiLine Salesforce Connector is the solution to improve the experience of sales teams by helping them sell faster, smarter and in the environment that they are familiar with.

Before you Start

- Your organization must purchase Salesforce Connector for you to have access to this tool.
- Only Chrome browser is supported
- Doesn't support Group Messages
 - Incoming group messages will appear as individual messages.
 - If a group message is sent to two or more contacts from the mobile app, records will be logged for each user separately in MultiLine for Salesforce; one for each contact. Each contact's log will individually show the outgoing message sent by the Salesforce user.
- Doesn't support Picture Messages
 - User will receive an automated message reading "Unsupported multimedia" for all incoming picture messages

MultiLine Salesforce Connector Features

Seamless integration between Salesforce and MultiLine app

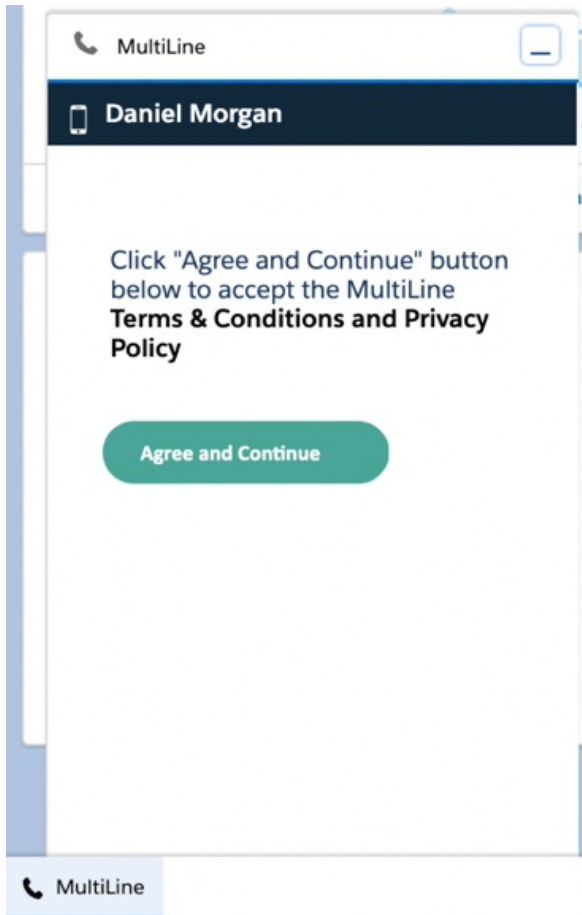
- Inbound/Outbound calling
- Visual Voicemail
- Supports Salesforce Lightning
- MultiLine Utility
- Click to Text
- Click to Call
- Automatic Call Logging
- Alert Notifications
- Notes
- Automatic Reply

- Quick Text Templates
- Reporting

Step 1: Activate MultiLine for Salesforce

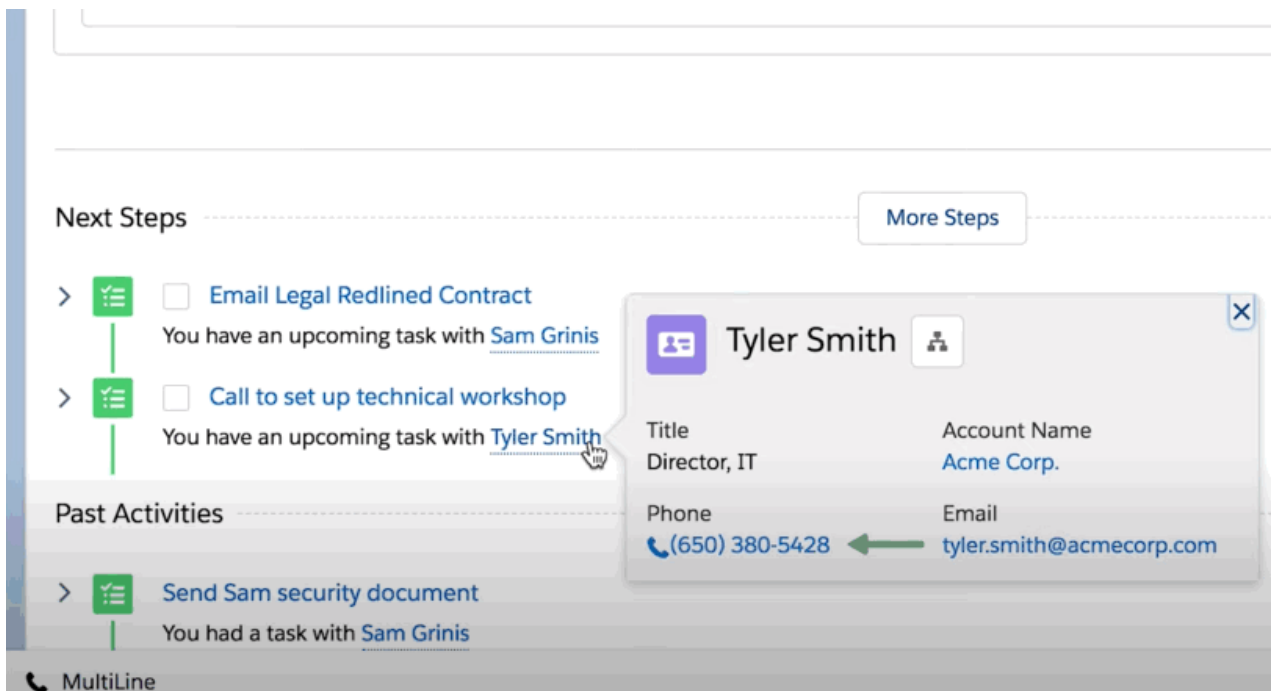
Once your organization sets you up with MultiLine for Salesforce, when you log into Salesforce, you should see the MultiLine utility in the bottom left of your screen.

Agree to the **Terms and Conditions**, and your Salesforce account will be linked to MultiLine.



Step 2: Calls and Messages

With MultiLine for Salesforce all phone numbers in Salesforce are clickable.



- On clicking any phone number field in Salesforce, the MultiLine for Salesforce utility is launched.
- The phone number is automatically populated in the keypad and provides the user a choice to send an SMS or make a call.
- Click on the calling icon to initiate the call.

Softphone Calling Modes

MultiLine for Salesforce supports two calling modes.

1. Softphone Disabled: Allows the Salesforce User to initiate a call from Salesforce directly - but requires the MultiLine app or a deskphone to be configured to continue the call
2. Softphone Enabled: Allows the Salesforce User to make calls directly from the softphone in Salesforce.

This setup is decided by the Salesforce Admin while installing the package. It can be changed by the Salesforce Admin at any time.

Softphone Disabled

Outgoing Calls:

The call first rings on the MultiLine application installed on the user's device - and on the deskphone if the Salesforce User has configured it to do so under Settings. Once the call is answered on either device, it prompts the user to enter any key. Upon entering the key, the call is then connected to the called number. If the call goes to voicemail on the MultiLine number, then the called number is never connected.

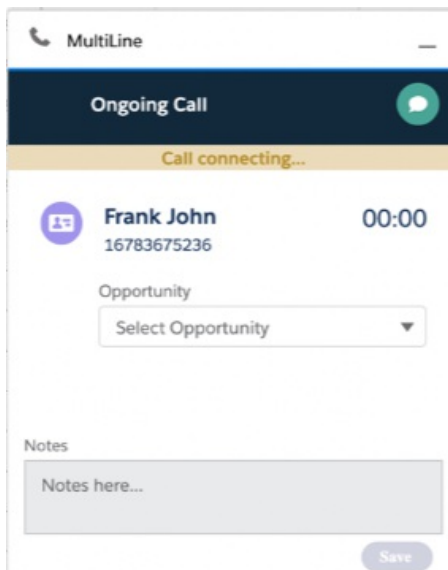
Incoming Calls:

MultiLine for Salesforce opens up automatically to notify the user of the incoming call. Calls ring on both the MultiLine app on the device and on the deskphone if the Salesforce User has configured it to do so under Settings. The user can enter notes on the MultiLine for Salesforce but needs the

MultiLine app on the device or a deskphone for other call controls as mute/keypad/end call.

Answered/Ongoing Calls:

To log notes related to the call, enter the notes in the text area shown below and click **Save**.



Softphone Enabled

Outgoing calls

If a Salesforce Admin enables Softphone, the Salesforce User can make calls from the softphone directly within MultiLine for Salesforce in the Salesforce application.

Incoming calls

On an Incoming call, the calling interface in Multiline for Salesforce opens. You can answer, reject or respond via text from the calling interface.

Click on 'Reject' to reject the call or on 'Answer' to answer the call.

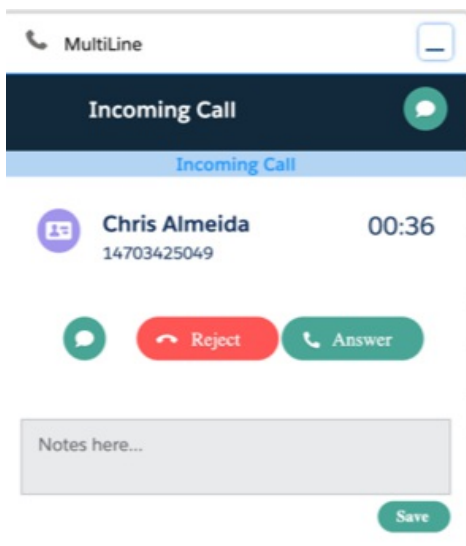
Click on the message icon to disconnect the call and respond with a message.

An incoming call also rings on the MultiLine app. The user has a choice whether to answer the call from MultiLine for Salesforce or from the MultiLine App. Incoming calls will continue to ring on MultiLine for Salesforce even if the device on which the MultiLine app is installed is powered off.

Incoming calls will continue to ring on MultiLine for Salesforce irrespective of the incoming call on data or minute setting of the MultiLine app on the device.

Answered/Ongoing Calls

1. Enter notes within the "notes" blurb and click save to log notes against the call.
2. Click 'Mute' to mute.
3. Click 'Keypad' to add the extension.
4. Even when a call is answered on the MultiLine app the User can add notes into Salesforce.



Syncing between MultiLine and MultiLine for Salesforce

- All calls made from the MultiLine app are synced with MultiLine for Salesforce.
- Incoming calls answered on the MultiLine app appear as “answered” on MultiLine for Salesforce.
- Calls made from MultiLine for Salesforce are NOT synced onto the MultiLine app.
- Incoming calls answered on MultiLine for Salesforce appear as “missed” on the MultiLine app.

Call Logging

All calls made/received on MultiLine for Salesforce are automatically logged as a task under the 'Activity' subsection of the respective contact/lead.

During or after the call, the Salesforce user can enter notes in the notes section located in that subsection. These notes will be saved in the call log. Notes can also be viewed and edited from the 'Tasks' section created for each call under the 'Activity' subsection.

All ongoing calls go through three different stages:

- Call connecting: When the call rings
- Call in progress: When the call is answered
- Call ended: When the call has ended

Recent Calls

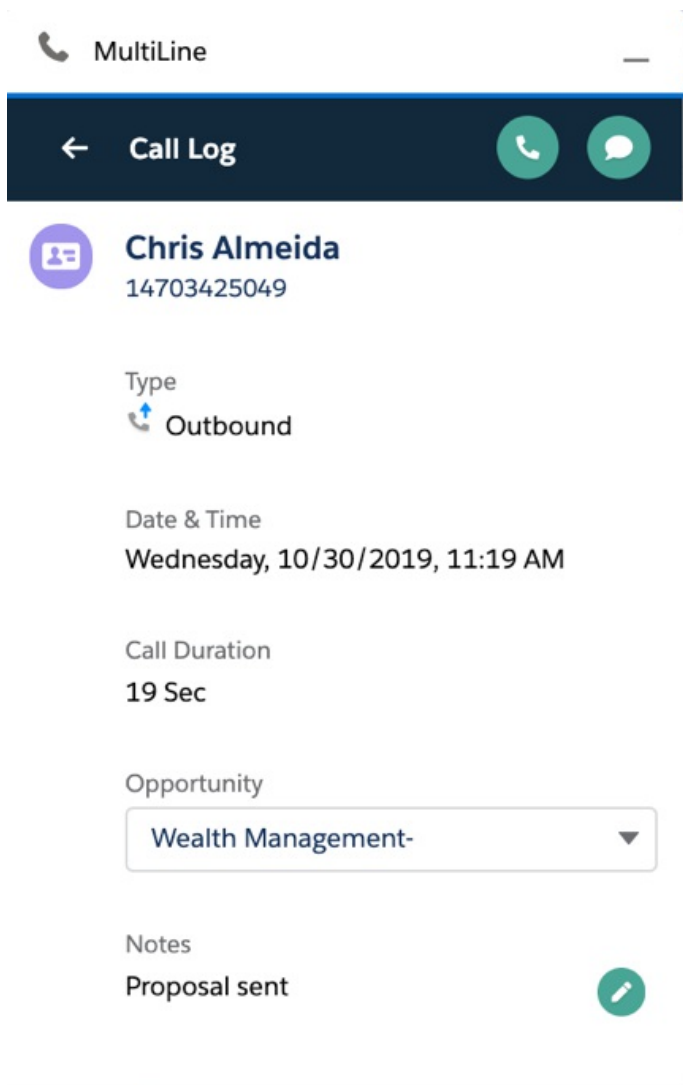
The Call tab in MultiLine for Salesforce lists the calls with a lead, contact or person account. Outgoing calls, incoming calls, and missed calls are differentiated by appropriate indicators.

Each call record shows:

1. The name of the lead, contact or person account,
2. The timestamp of the call (Note: for the current day, only Time is displayed. For the last seven days, the Day and Time is displayed. Prior to last seven days, the Month, Date, Year and Time is displayed)
3. The duration of the call
4. The notes indicator (if notes are logged for the call)
5. Calling ability
6. Messaging ability

To navigate to more extensive details of the lead, contact or person account, click on their name.

Click anywhere else to get call details. Call details shows the notes entered previously. These notes can be modified during the call or any time after the call has ended by clicking .



All calls made from MultiLine for Salesforce can be recorded by purchasing the 'Call Recording' feature from the MultiLine platform. The recordings are available in the MultiLine Admin Portal and/or through the platform's integration with your archival system.


Out of office features

Do not Disturb and **Call Forwarding** settings on the MultiLine application are applicable for incoming calls in the MultiLine Connector as well.

- If **Do not Disturb** is set on the MultiLine app on the device, the call is sent to voicemail.
- If **Call Forwarding** is set on the MultiLine app, the call is forwarded to the number configured in the MultiLine application; whereas the 'Business Hours' configuration in the MultiLine application is ignored in Salesforce.

Handling Unsaved Contacts

You can call to an unsaved number from the keypad. An incoming or outgoing call to an unsaved number will create a record in the Recent calls / Recent messages screen.

On opening the call detail or message conversation screen, click the  icon on the top left to create a new contact or associate an existing contact with this number.

Send or receive an SMS

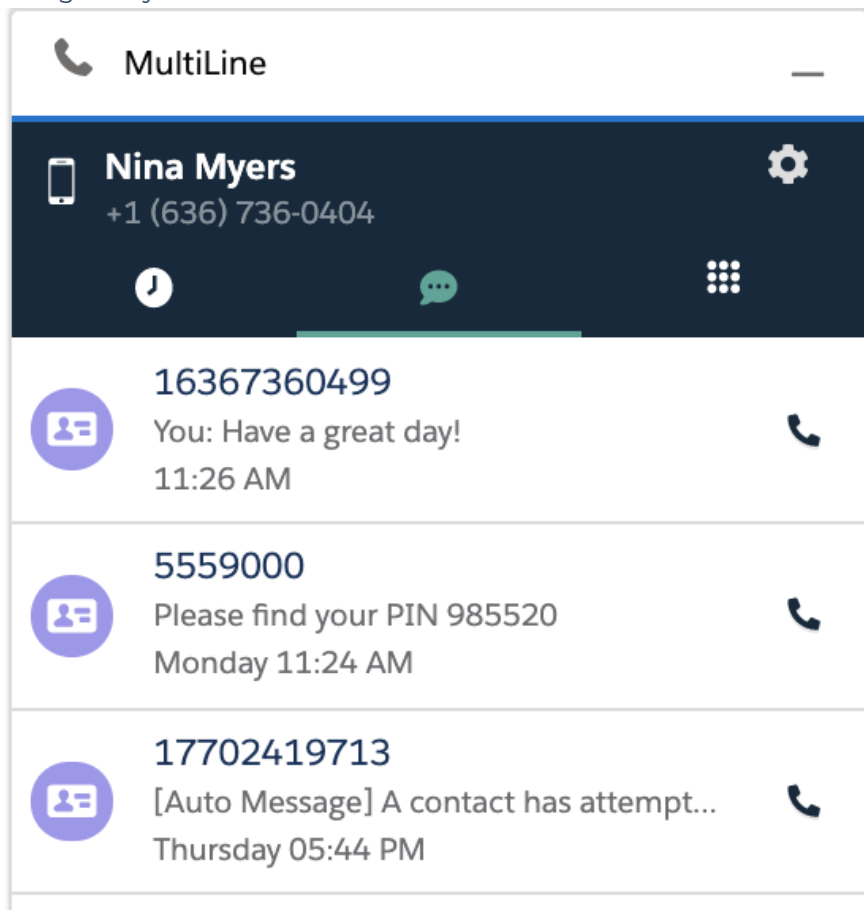
- Clicking any phone number field in Salesforce will launch MultiLine for Salesforce
- The phone number will auto-populate in the keypad
- Clicking on the message icon opens the message conversation thread with that number

Recent messages

Recent Messages shows the list of all the lead, contact or person accounts that the Salesforce User has message conversations with.

Each record shows:

- The name of the lead, contact or person account
- The timestamp of the message (Note: for the current day, only Time is displayed. For the last seven days, the Day and Time is displayed. Prior to last seven days, the Month, Date, Year and Time is displayed)
- A snippet of the last message
- Calling ability



- To navigate to the details of the lead or contact or the person account

1. Click on their name.
2. Click anywhere else to open the message conversation thread.
3. Type the message in the text area or use a Quick Text template.
4. Click on the send button.
5. All messages shared from MultiLine for Salesforce are synced in the MultiLine app on the device, and all messages shared from the MultiLine app are synced in MultiLine for Salesforce.

All messages sent from MultiLine for Salesforce can be recorded by enabling the 'Message Recording' feature for the organization (to be done by Salesforce Admin). The recordings are available in the MultiLine Admin Portal and/or through the platform's integration with the customer's archival system.

Use Salesforce's out-of-the-box functionality for Quick Text to save time by creating common responses ahead of time that you can retrieve easily from the message conversation screen.

Enable Quick Text

1. Open the **Setup** tab
2. Click **Enable Quick Text**

Create a Quick Text

1. Open the **Setup** tab
2. Enter **Quick Text Settings** in the **Quick Find** box
3. Select **Quick Text Settings**
4. Select **Enable Quick Text**
5. Click the **App Launcher**
6. Under **All Items**, select **Quick Text**
 - In standard navigation apps, click the **Quick Text** tab
 - In console navigation apps, select **Quick Text** from the item picker
7. Click **New**
8. If you have more than one quick text record type, select a record type for the new message
9. Click **Continue**
10. Enter a message name
 - Use a name that helps users identify when to use this message
11. Enter the message
 - The message can include line breaks, lists, special characters, merge fields, and up to 4,000 characters
12. Select the channels in which you want the message to be available
 - Depending on which features are enabled in your org, the following channels might be available

◦ Channel types

Email—for Email actions

Event—for Event actions

Internal—works with internal fields, such as the Change Status action Knowledge—for Knowledge articles in Lightning Experience

Live Agent—for Live Agent chat in the Service Console

Phone—for the Log a Call action

Portal—works in a community or a customer portal

Social—for social posts

Task—for Task actions

13. Select a **Category**

- In organizations created before Spring '18 that have quick text enabled in Salesforce Classic, this field is required, and a default Category is provided for you. In organizations created after Spring '18, this field isn't required

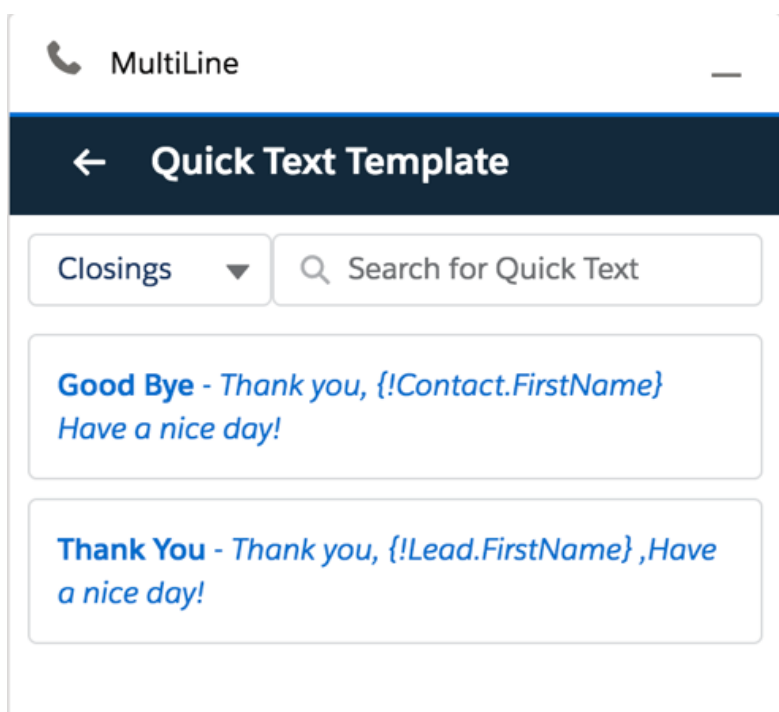
14. Select a folder


- Folders help you organize and share quick text. You can create up to four levels of folders: one root folder and up to three subfolders
- This field is visible only when Share and organize quick text in folders is enabled
- In some organizations, the Folder field must be added to the page layout

15. If you use merge fields, click **Preview** to review the message with data from the records that you choose

16. Click Save

Add a Quick Text



1. When composing a message, click the **Quick Text** icon  to bring up the list of available Quick Text templates
2. Select the template.

The content of the selected template will populate the message text area

Refer to [Salesforce Help](#) for more information on creating Quick Text messages and sharing them.

If you make or receive a call from an unsaved number, this automatically creates a contact under the default account **MultiLine Internal**. This account is set by the Salesforce Admin while installing the MultiLine for Salesforce.

For these contacts:

- The first name and last name fields are saved as the phone number.
- The email address is saved as [phone number]@domain.com.
- The mobile field is saved as the phone number.

The contact can be later modified if the user has privileges to edit contacts.

The Salesforce administrator can further build workflows or visual flows to assign these contacts to separate groups/teams, auto-delete, or take advanced actions such as alert users/groups based on keywords in the text message.

Step 3: Settings

Set an Out of Office auto-reply by going to **MultiLine for Salesforce > Settings > Out of Office**.

1. Enter **From** and **To** dates to set the time range
2. Complete the out of office auto-response
3. Set the **Active** toggle to on and click **Save**

All incoming SMS during the set 'out of office' date range will receive the auto-response defined in this configuration

MultiLine

← Settings

OUT OF OFFICE

Active

From

Aug 6, 2019 7:56 AM

To

Sep 14, 2019 7:56 AM

Reply to every text message with

I am currently on vacation and will be back online on 9/15. Thank you.

Cancel Save

Do Not Disturb and **Call Forwarding** settings on the MultiLine application are applicable for incoming calls in the MultiLine Connector as well.

- If **Do Not Disturb** is set on the MultiLine app on the device, the call is sent to voicemail.
- If **Call Forwarding** is set on the MultiLine app, the call is forwarded to the number configured in the MultiLine application; whereas the 'Business Hours' configuration in the MultiLine application is ignored in Salesforce.

You're ready to use Salesforce Connector

You've learned how to navigate the Salesforce Connector and use it to manage calls and messages within Salesforce. To learn more about using the mobile app, explore the Using MultiLine category.

Get started with MultiLine Desktop

Last Modified on 11/03/2021 7:26 pm EDT

Read on to learn about using MultiLine Desktop.

Overview

MultiLine Desktop brings the mobile business calling and messaging features critical to your frontline client communications to the browser.

For regulated users, these calls and messages will be captured for compliance teams in the Management Portal just as they are in the mobile apps. You can sync with your Office 365 Exchange Contacts, or build a local contact list. 1:1 messaging and calling is supported. Manage Availability and Call Handling settings can only be set in the mobile app, but will apply for the desktop.

Before you start

You can use the MultiLine Desktop application with the following browsers:

- Chrome 90.0.4430 or above
- Safari 14 or above
- MS Edge 90.0.818.39 or above

Activation and first log in

Accept your invitation

To prevent unauthorized users, both mobile and desktop MultiLine applications don't allow self-registration and are invitation-only.

For current users of the mobile app, expect an email from your organization providing you the link to your organization's MultiLine Desktop web site. Use the username and password from your most recent invitation to the mobile app. If you can't find it, you can reset your password using Forgot Password.

For new users to mobile and desktop, The link to MultiLine Desktop and credentials for activating your mobile app and your first log in to the web portal are included in the MultiLine invitation.

- Your username will be an email address.
- The password in your invitation is a one-time use password that will only be used for your first log-in. After you sign in, you will be asked to set a new password.
- If you lose your invitation, contact your IT team to have a new one sent.
- If you receive multiple invitations for any reason, use the details in the most recent invitation.
- Continue to use the password from your most recent invitation whenever you need to activate or reactivate your mobile application, not the new password you set for Desktop.

Hi Brittany Hoffman,

Welcome to MultiLine!

- On your iPhone or Android, tap the button below

Download and Activate

- On your computer, use your phone's camera or QR reading app to scan the QR code below



- To manually activate, click [this](#) link to download the app and enter the credentials below during onboarding

Company ID : MYCT.GHT200

User Name : john.s@gmail.com

Password : GhBf56Xfgt

- To access MultiLine WebClient click [this](#) link and enter the credentials below during onboarding

User Name : Brittany.Hoffman@MoviusCorp.com

Password : GhBf56Xfgt

First Log In

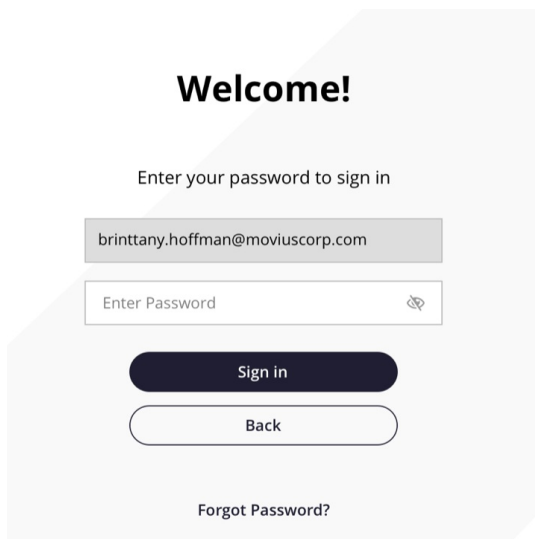
1. Enter the email ID from your invitation on the log in screen.
 - If you're set up with two factor authentication, SSO, or other security measures, these will activate automatically once you've entered your email ID.

Welcome!

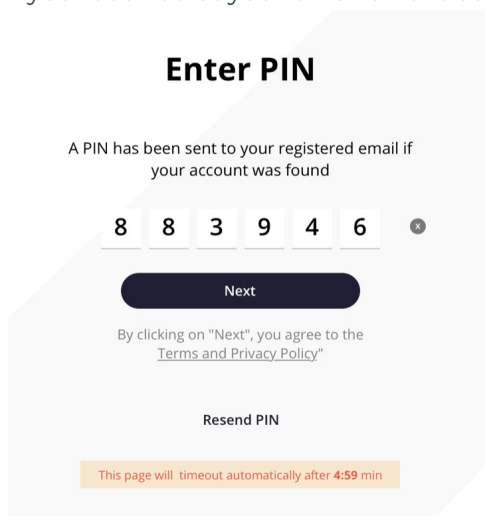
Enter your username to sign in

Continue

2. Enter your password from the invitation, then check your registered email for a PIN. *Note: If you can't find your invitation, click [Forgot Password](#) to set a new one. After completing the Password Reset steps, you'll skip to step 5, syncing your Exchange Contacts.*



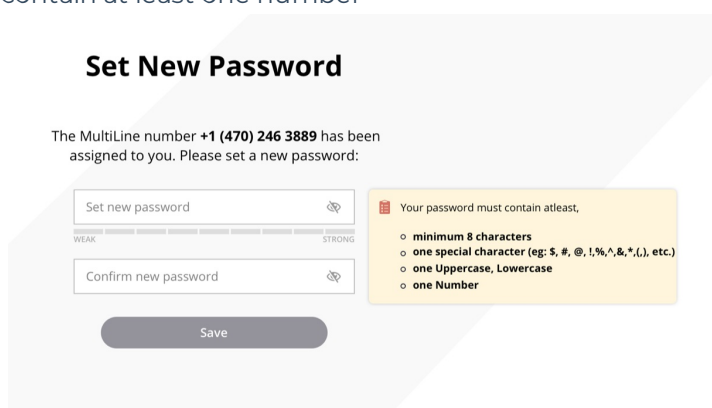
3. Enter the PIN you received at your email on the screen. *Note: You must type it in rather than*



copy-paste.

4. You'll be prompted to set a new password.

- o Password Requirements:
 - minimum of 8 characters
 - contain at least one special character, at least one uppercase and one lowercase character
 - contain at least one number

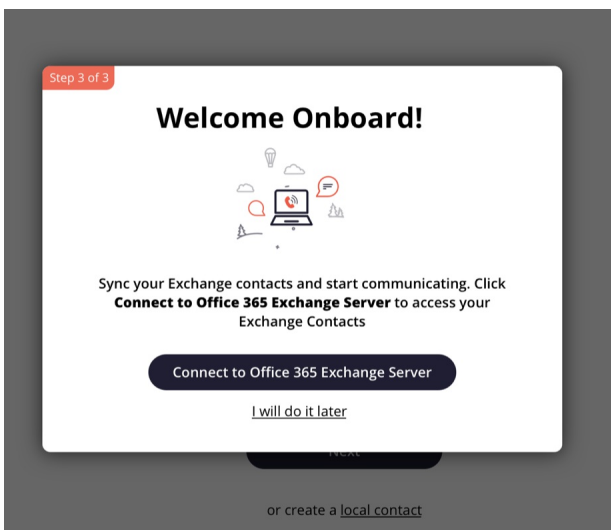


5. If you're a user in the USA, and haven't entered your E911 information into the mobile app, you'll see the E911 screen. Use the address where you'll be using MultiLine Desktop, this address will be used by emergency dispatchers if you contact 911.

Example below for emergency address "11370 Lakefield Drive Johns Creek Duluth, GA 30067":

The diagram illustrates the mapping of form fields to a contact record. On the left, a form has fields for First Name, Last Name, Unit/Apt Number/Street#, Address Line 1, Address Line 2, City, Postal / Zip code, and State. A red arrow points to the right, where the same information is pre-filled in a contact record for 'John Green' at '11370 LAKEFIELD DR, JOHNS CREEK, DULUTH, GA 30067'.

6. You'll be prompted to sync your contacts. We can identify your Office 365 Exchange account using the email you signed in with, so it will only take a few seconds.



That's it! Your MultiLine number will display and the activation process for the web application is complete.

You'll remain logged to MultiLine Desktop as long as you have the site open in the browser even if you are using other tabs or browser windows. We will display a notification and play a sound for incoming calls.

Calling

Making a call

There are multiple ways to make calls in MultiLine Desktop.

Note

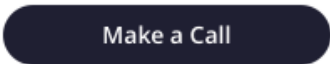
- You must grant MultiLine Desktop permission to use your microphone and speakers to make calls.
- Your organization must allow calling for you to make calls from MultiLine Desktop.

Calls Screen

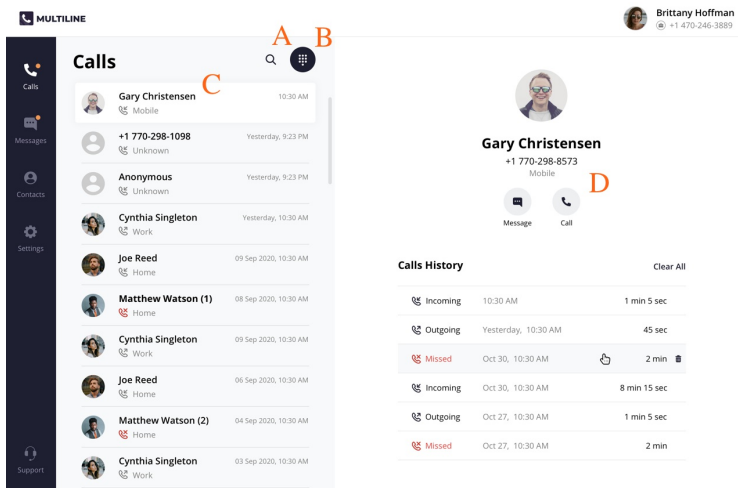
The first time you go to the Calls screen, click the **Make a Call** button to place your first call.



Your contacts are waiting to hear from you! Click **Make a Call** to begin dialing a number.



After you place your first call, your list of recent calls will appear on the **Call logs** screen.



1. Use the **Search** icon to search your recent Calls.
2. Use the **Dialer** icon to bring up the Dialer screen.
3. Clicking a **Call log** will display the call history and contact information, if available. For a saved Contact clicking on the **Contact name** or **Contact picture** will take you to the specific **Contact detail** page.
4. You can easily call or message a contact again from this screen by clicking the **Call** and **Message** icons.

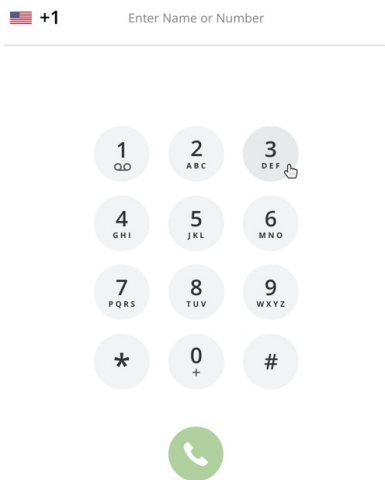
Dialer Screen

From the dialer, you can manually dial a number or enter the first or last name of a contact to pull up their number.

- You can click the numbers or use your keyboard.
- When dialing numbers, please make sure to include the international country code even when placing domestic calls.

Note:

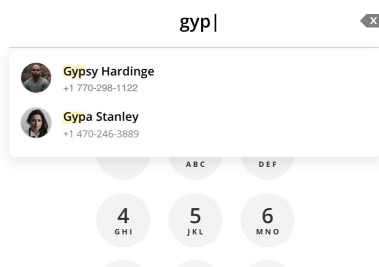
- Dynamic search will only display saved contacts, it doesn't search the GAL. See Search and Store Contacts from GAL.
- You must type at least three numbers or three letters of a contact's first or last name to activate the dynamic search.



Entering a number:



Entering a name:



Complete dialing the number, or select the contact, then click the **Start Call**  button.

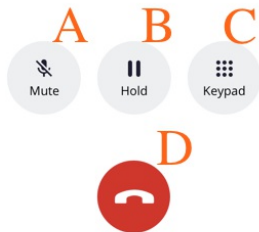
In-Call Screen

The **In-Call** screen will appear when someone you call answers the call, or you answer a call from someone else.



Gary Christensen

+1 770-298-8573
00:01:07



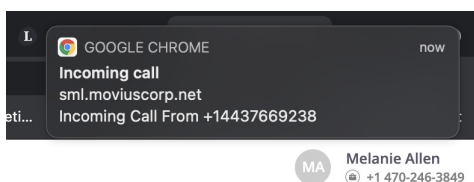
1. Use **Mute** to cut off your microphone. You can hear the other caller, but they can't hear you. Press it again to turn your microphone back on.
2. Use **Hold** to suspend the call. The call will not be disconnected, but neither party will be able to hear the other party during the hold. Press it again to end the hold.
3. Open the **Keypad** to dial numbers.
4. Use the **End Call** button to end the call.

Accept or reject incoming calls

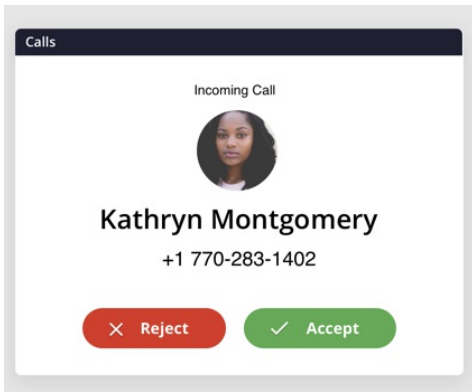
Your incoming call screen and notifications may appear differently depending on what you're doing.

Incoming Call Notifications and Screens

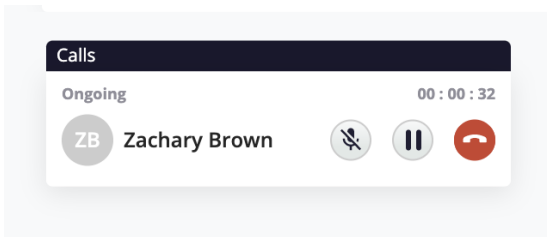
Whether you're on the MultiLine Desktop tab or window, the ringtone will play and a visual notification will display when you receive an incoming call.



If the caller is in your contacts, you'll see their contact information on the incoming call screen and options to **Reject** and **Accept**. Clicking **Reject** will send the user to your voicemail, and **Accept** will answer the call.

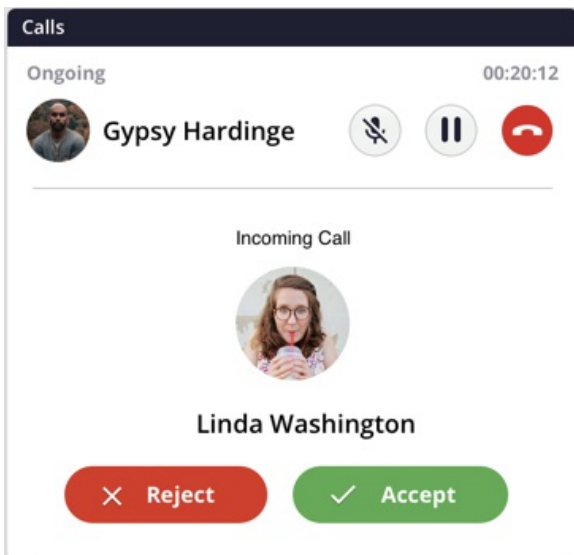


As you move through screens on MultiLine Desktop when you're on a call, the call window will follow. You can move it by clicking and dragging.



If you receive another incoming call, your option to accept or reject the incoming call will appear below your ongoing call. If you accept a call while on a call, this will automatically put the person you're currently talking to on hold.

A window will appear with the two calls. From this screen you can **swap calls**, and perform other actions.



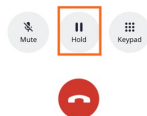
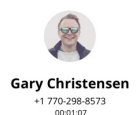
Many web users were bothered by nuisance audio coming from web sites that automatically play when a page is loaded, such as that from videos and advertisements. To address this, Chrome and Safari browsers added a feature that blocks audio by default from web pages if the page or tab is refreshed, but not clicked on by the user.

Therefore, if you haven't accessed the MultiLine Desktop tab since the last time it refreshed (for

example, if you closed and restarted chrome and loaded your tabs from the previous session) the ringing sound will be blocked. However, you'll still be able to see the visual notification of the incoming call.

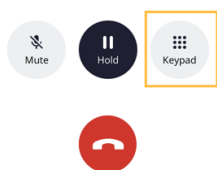
To unblock the ringtone from being played, open the tab where MultiLine Desktop has recently refreshed and click anywhere within the MultiLine Desktop application and this should ensure that the ring sound will play.

Place a call on hold



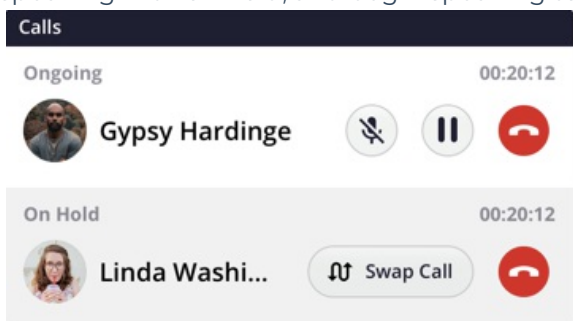
Click the **Hold** button to put the call on hold.

After putting the call on hold, you can dial a number by clicking the Keypad.



When you have two ongoing calls, your ongoing call window will display the information of the two parties. You can only speak to one party at a time the other will be placed on hold.

You will see the **Mute** icon, **Hold** icon, and **End Call** icon for the party you are speaking with. You will see the **Swap Call** icon for the party on hold. Click the **Swap Call** icon to put the party you're speaking with on hold, and begin speaking to the other party.



Use the Manage Availability and Call Handling in the mobile app MultiLine Settings menu to set in MultiLine Desktop.

- **Call Handling**
 - Set Simultaneous and Sequential Dialing
 - Set Call Forwarding

- Set Business Hours
- Set Do Not Disturb

Messaging

MultiLine Desktop currently only supports 1:1 SMS messaging. Group Messaging, Picture Messaging, and WhatsApp messaging coming soon!


When it's your first time on the Messages screen, click **Start a Chat** to send your first message.





Ready to message your contacts? Click **Start a chat** to begin a conversation.

Start a Chat

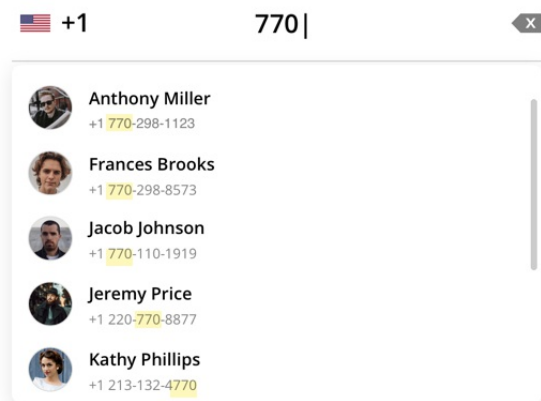
At the new message window, begin typing the first or last name of someone in your saved contacts, or a mobile number.

 +1

After you've entered at least 4 digits (including country code) or letters, you'll see a list of auto-

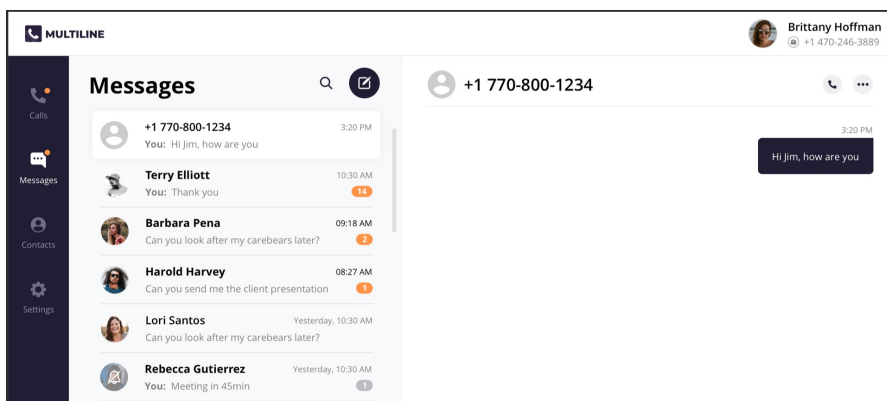
suggestions. *Note: only saved contacts will appear in the auto-suggestions.*



When you have completed entering the number, or selected from the results, you can type your message in the **Type your message...** field.

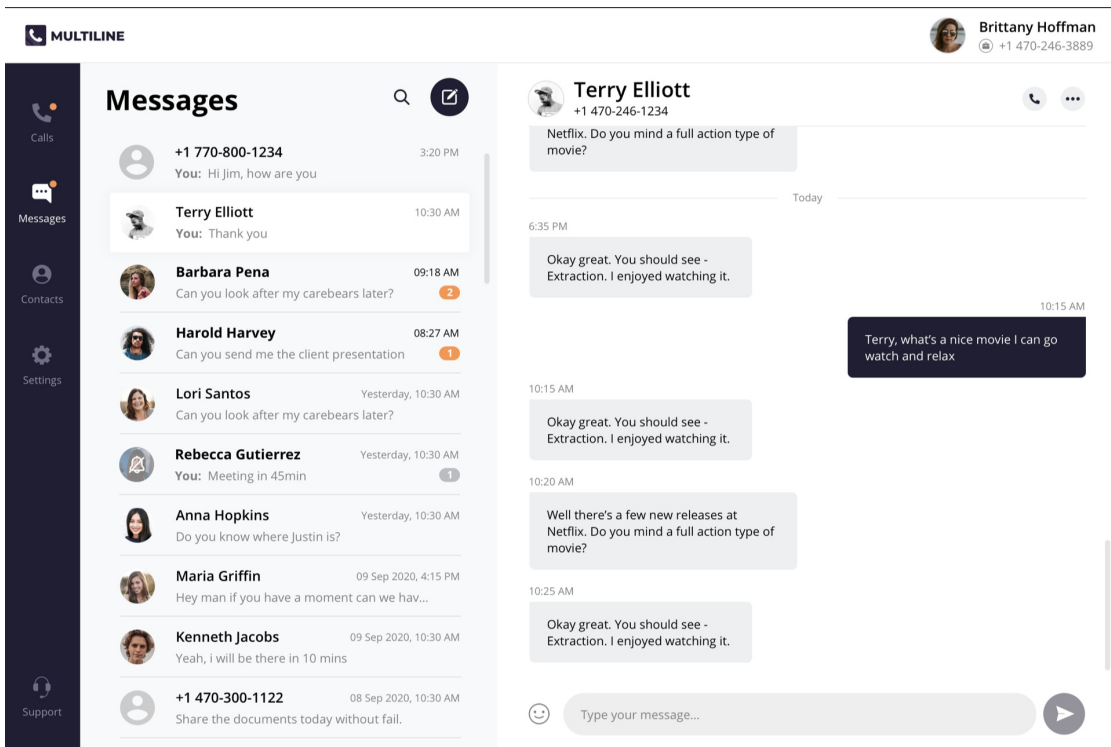



Press the enter or return key, or click the **Send Message** icon to send the message.

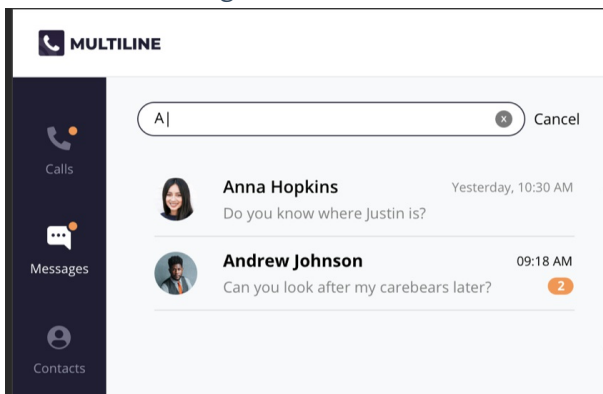



Once you've sent at least one message, your list of Messages will appear on the screen.

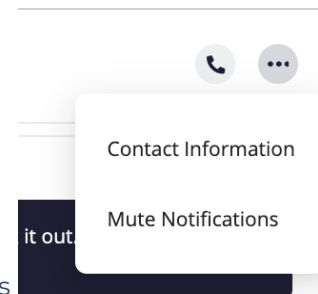
1. Click any **Message** to see your Message history.



2. Click the Search icon  to search your messages by name or number. *Note: search does not search message content.*



3. Click the New Message icon  to start a new message.



4. Click the menu icon to see Contact Information or Mute Notifications

1. Select Contact Information to see the Contact Information screen. If the user is in your contacts, you'll see the information stored. If not, you'll be able to add the user to your contacts from this screen.
 1. User is in contacts:



Terry Elliott

terry.elliott@moviuscorp.com



Message



Call

Details

Home	+1 770-298-8573
Company	Microsoft
Job title	Manager
Business Address	11360 Lakefield Dr Duluth, GA 30097 United States

2. User is not in contacts:



14705182526

Unknown



Message



Call



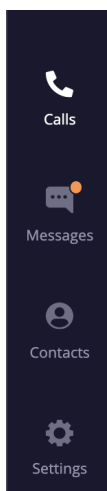
Create Contact



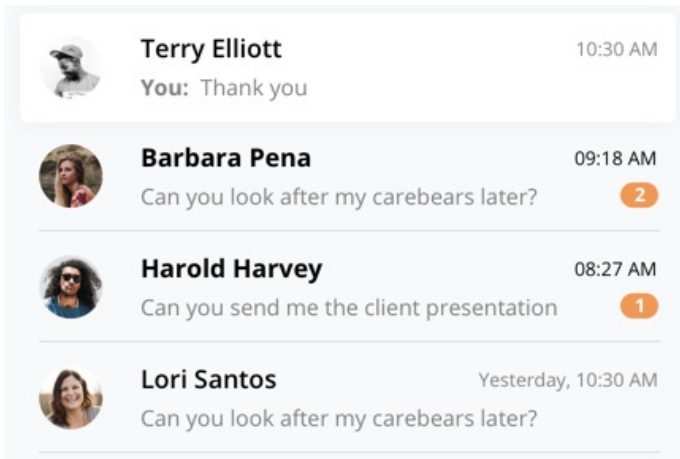
Add to Existing

2. Select Mute Notifications to stop sound and visual notifications when the contact messages you. You will see the messages sent to you when visiting the message thread.

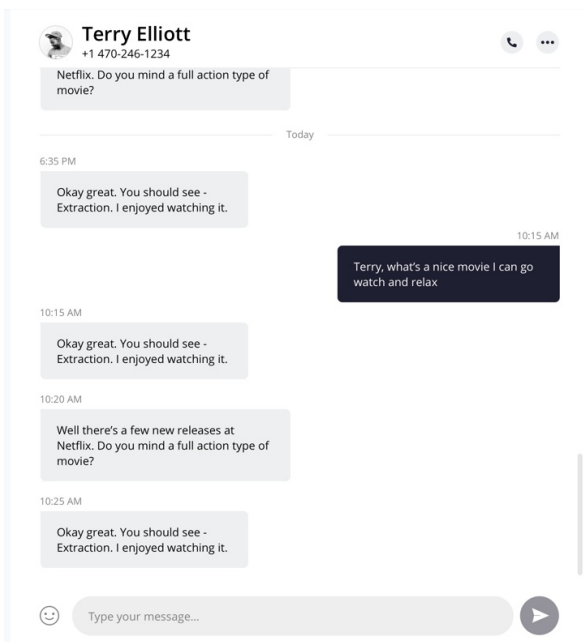
When you have new messages there will be an orange badge notification on the Messages tab.



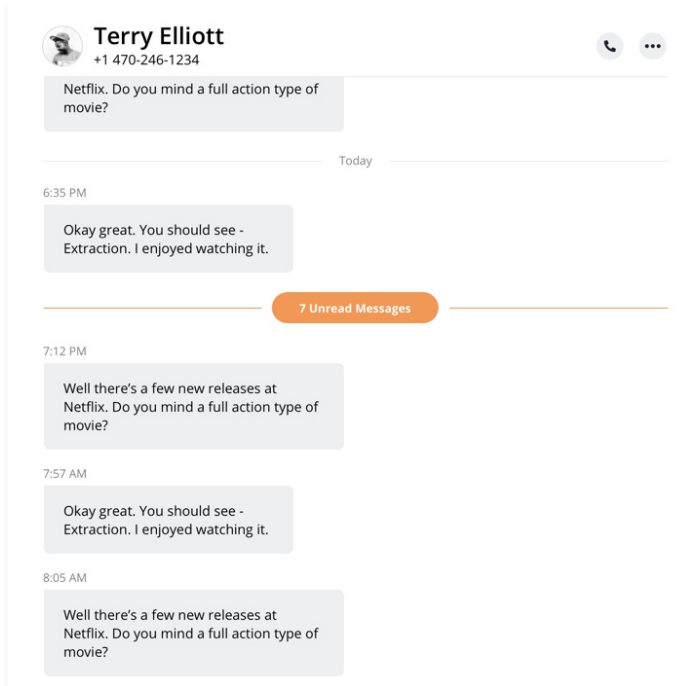
Threads with new messages will have an orange badge notification. The number represents how many unread messages are in the conversation thread.



We provide helpful reminders to help you know what to pay attention to. For example, we might show you that a set of messages is from today.



Or if you've had many new messages, we will show you where your unread messages begin.



Contacts

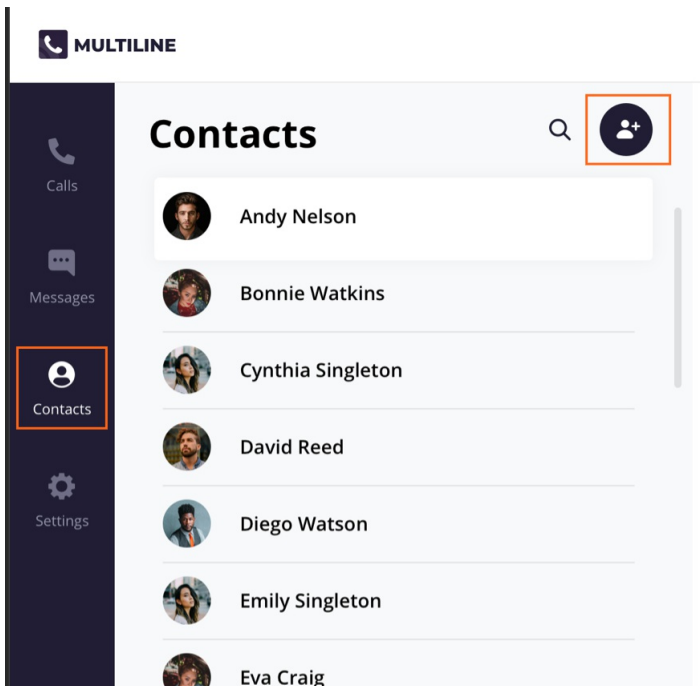
You can add, edit, update and delete contacts from the **Contacts** screen. You can also add and update unknown numbers from the **Calls** and **Messages** screens.

Note: When using Exchange Contacts, you can also add contacts to your list by adding them directly to the Office 365 Exchange Server. It will reflect in your contacts list at the next sync period.

Add a new Contact


You can add, edit, and delete contacts from the **Contacts** screen.

1. Go to **Contacts** and click the **Create Contact** icon.



- The Create Contact screen will appear. Fill out the details then click **Create**. *Note: The only required fields are First Name and Last Name and at least one phone number. You can add all fields that are available in Office 365 Exchange Contacts.*


Create Contact



First name * **A**

Last name *

Contact information



+1 **B**

Email **C**

Work

Company **D**

Notes

Add notes **E**

+ Add More **F**

Cancel

Create

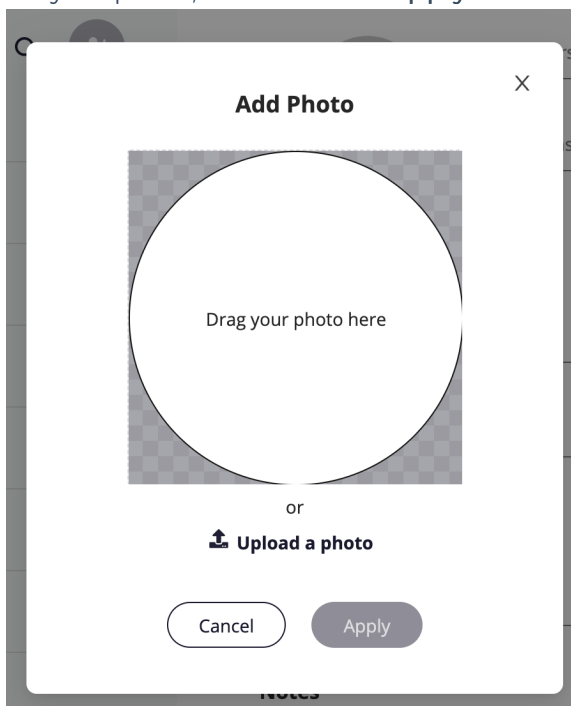
1. First Name and Last Name
2. Contact Information
 - Business Phone is the default label
 - Make sure to include country code when entering phone numbers

3. Email Address
4. Work (Company Name)
5. Notes
6. Add More menu
 1. Click Add More menu to add more fields

Expanded Contacts screen



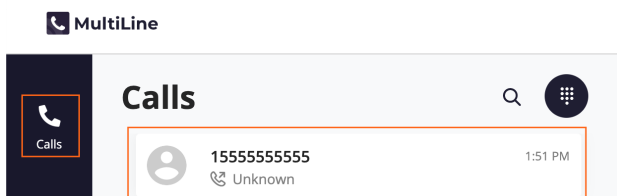
3. Add a picture for the contact by clicking the camera icon.
 - Add your photo, and then click **Apply**.



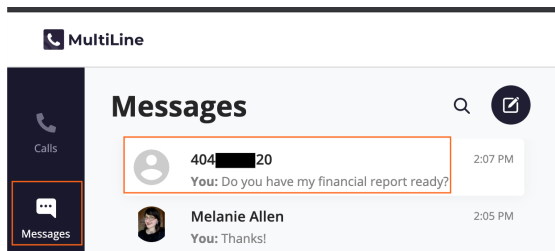
4. When completed, click **Create**.

Add an unknown number to Contacts

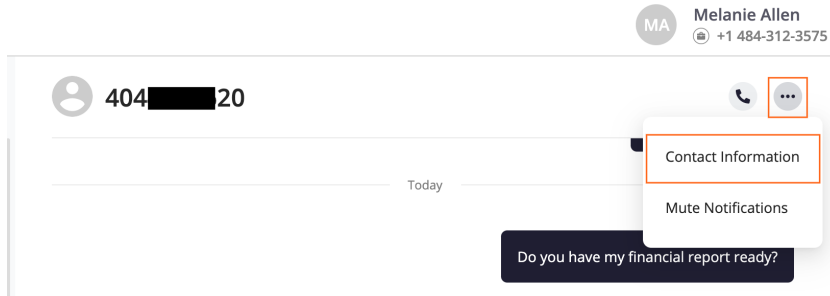
1. You can add an unknown number from **Calls** or **Messages**:
 1. For calls: Go to **Calls** and click the **Call log**.



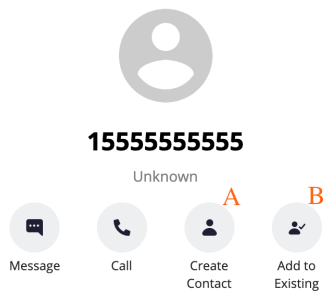
2. For messages:
 1. Go to **Calls** and click the **Message Log**.



2. Click the Messages Menu and select Contact Information.



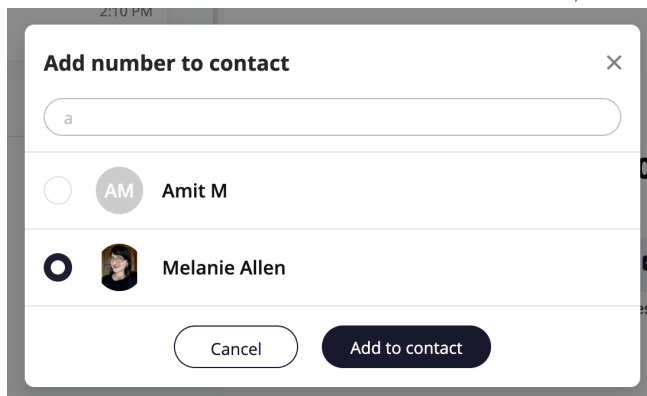
2. You have two options to add the caller to your Contacts list:



Calls History

Outgoing	1:51 PM	1 sec
----------	---------	-------

1. To make a new contact from the Unknown number, click **Create Contact**.
 - This will pull up the **Add a Contact** screen, where you can fill out the details as desired.
2. To add the Unknown number to an existing contact, click **Add to Existing**.
 1. Narrow down the list of contacts by typing in at least one letter of the existing contact's first or last name into the search field.
 2. Click the radio button for the desired contact, then click **Add to Contact**.



3. This will pull up the **Update Contact** screen and automatically add the new number.
 1. Click **Update** to add the new number.
 2. If you need to delete the old number, hover over the number to reveal the

trashcan icon, click it to remove the number, then click **Update**.

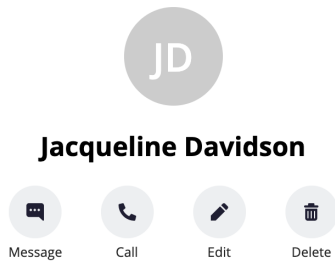
Contact information

Home Phone
+15555555555



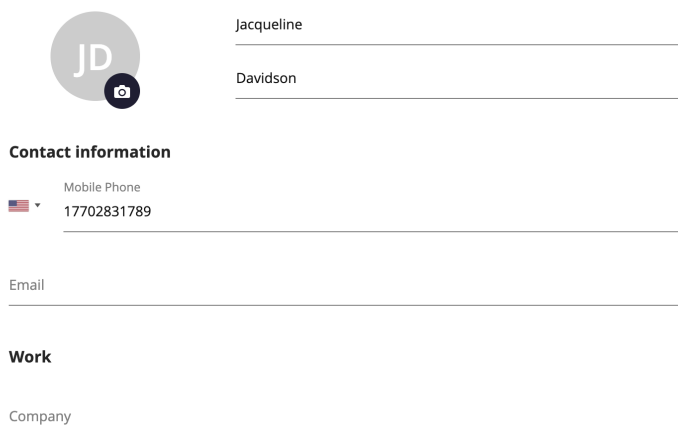
Edit or Update a Contact

1. Go to **Contacts**, and click the **Contact**.



2. Click **Edit**.
3. On the **Update Contact** screen, make your desired changes.

Update Contact



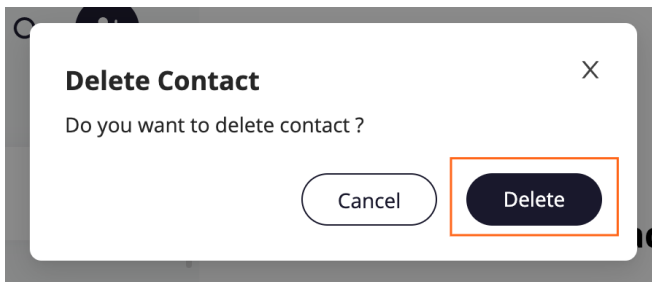
The 'Update Contact' form shows the contact's name 'Jacqueline Davidson' and a profile picture with initials 'JD'. Below the name are input fields for 'Mobile Phone' (with a dropdown menu showing '+17702831789') and 'Email'. Under the 'Work' section, there is an input field for 'Company'.

4. Click **Update**.



Delete a Contact

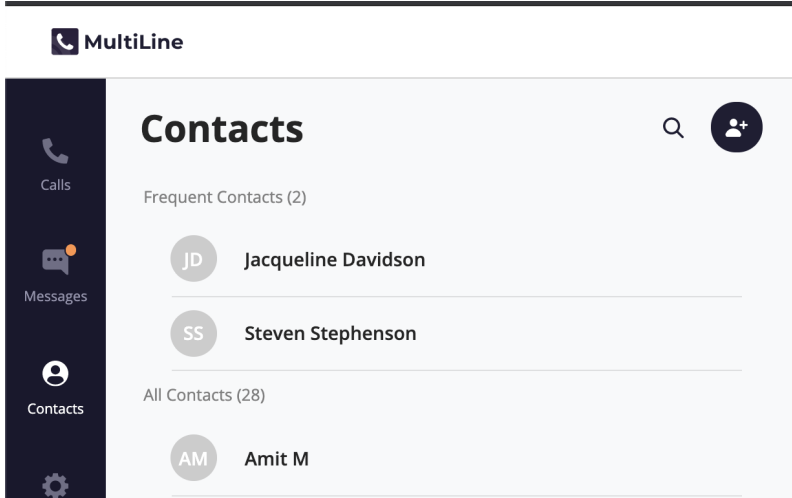
1. Go to **Contacts** and click the **Contact**.
2. Click **Delete**.
3. At the confirmation prompt, click **Delete**.



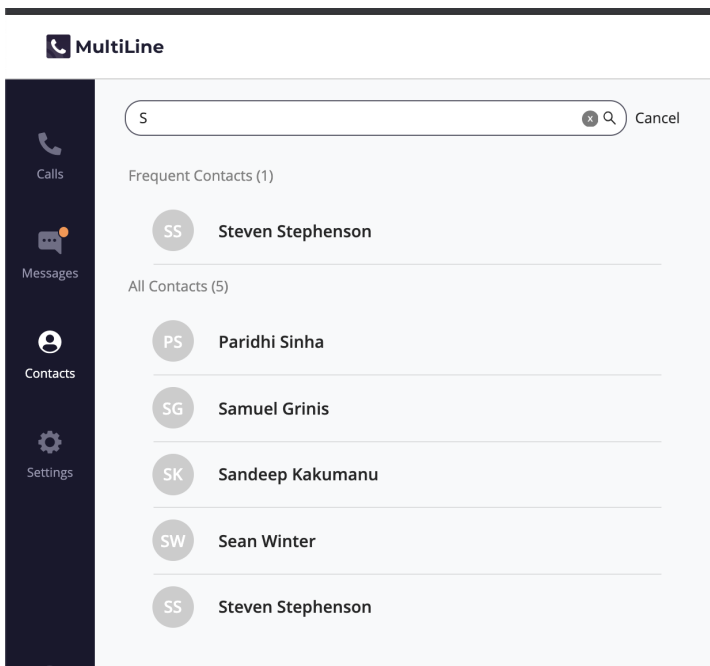
Searching Contacts

You can search contacts from the Contacts page by their first or last name.

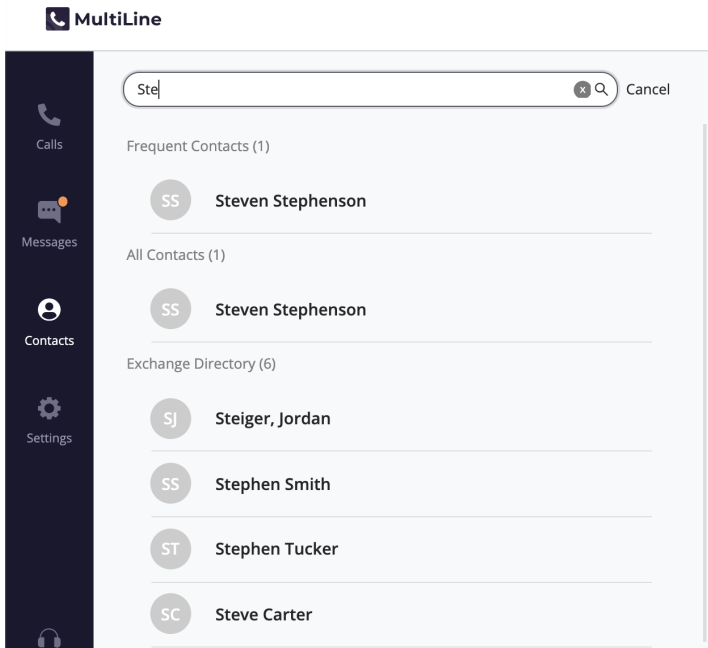
1. Click the Search icon to pull up the search field.



2. Once you begin typing the first letter, dynamic search will automatically pull up matches from your locally added contacts.



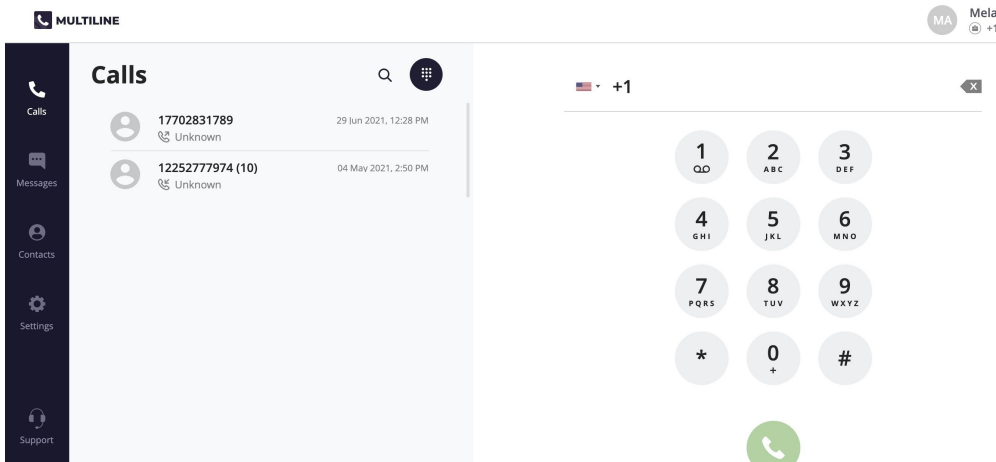
3. If you're using Exchange contacts, type at least 3 characters to search the entire GAL directory.



Voicemail

The first time you dial your voicemail you'll need to set up your voicemail password. The automated system will guide you through the steps.

1. Go to the **Dialer** screen.
2. Long press on 1 for a few seconds until it begins dialing your voicemail.

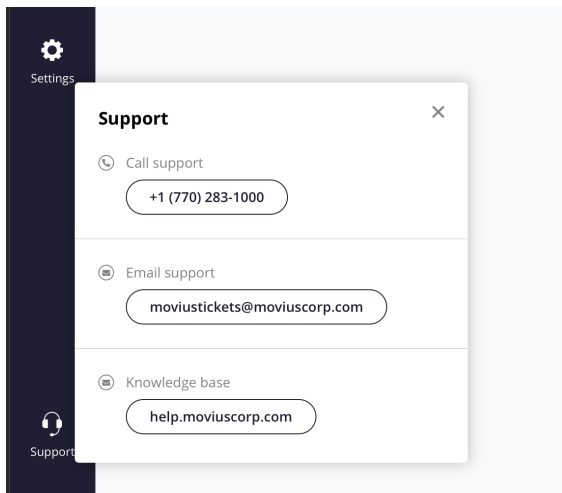


3. When prompted, dial your voicemail password.

You'll be able to listen to each voicemail, repeat, and delete voicemails.

Support

To get technical assistance or submit a bug, click the **Support** icon.



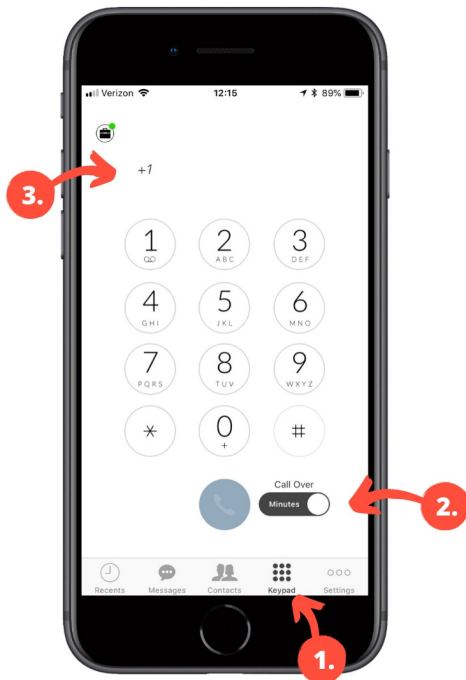
- Click the number to dial IT.
 - Click the email to send an email to IT.
 - Please use the form to describe your issue.
 - This email will automatically include logs to help diagnose your issue.
 - Click the Knowledge base URL to return here and use our self-help resources.
-

Making Calls

Last Modified on 11/03/2021 8:24 pm EDT

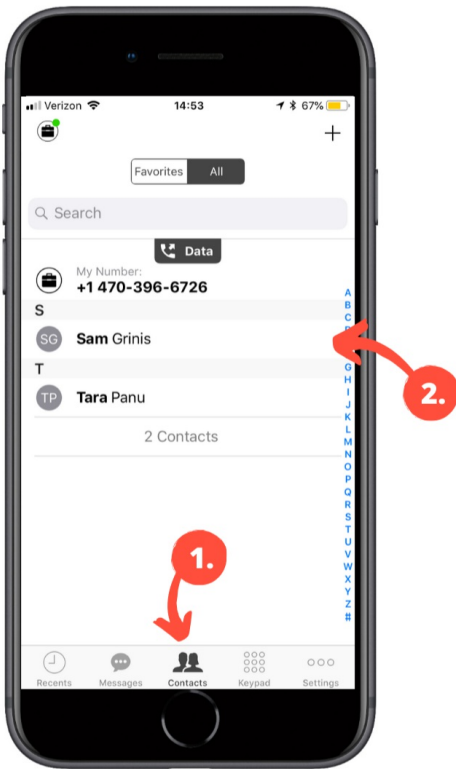
There are multiple ways to place a call in MultiLine: from the **Keypad**, from the **Recents** tab, and from your **Contacts** list.

Make a Call from Your Keypad Screen

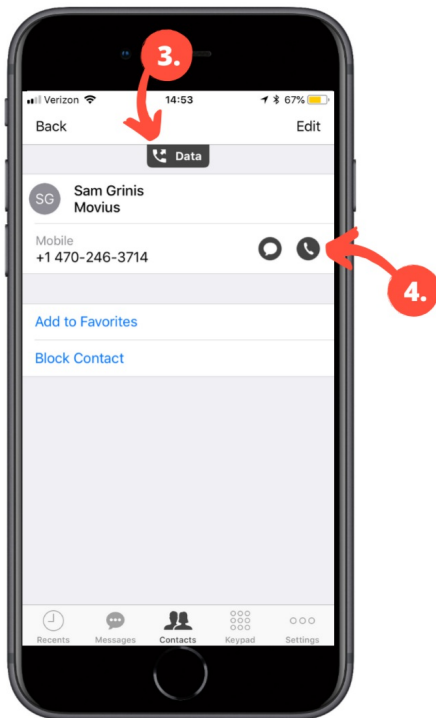


1. Go to your Keypad tab in the navigation bar at the bottom of your screen (iOS) or the bottom right (Android)
2. If you see a toggle, you can choose whether to **make the call over Data or Minutes**
3. Search for a contact or type in a number using the buttons on the screen

Make a Call from Your Contacts Screen

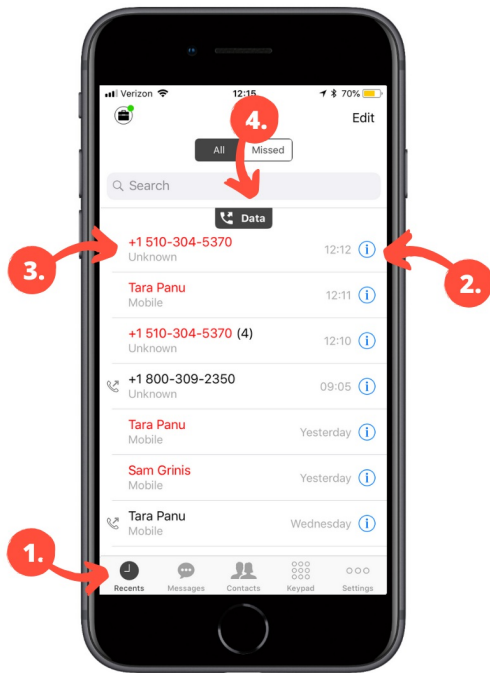


1. Go to your **Contacts** tab in the navigation bar at the bottom of your screen (iOS) or top of your screen (Android) to bring up your Contacts list.
2. Tap a contact.



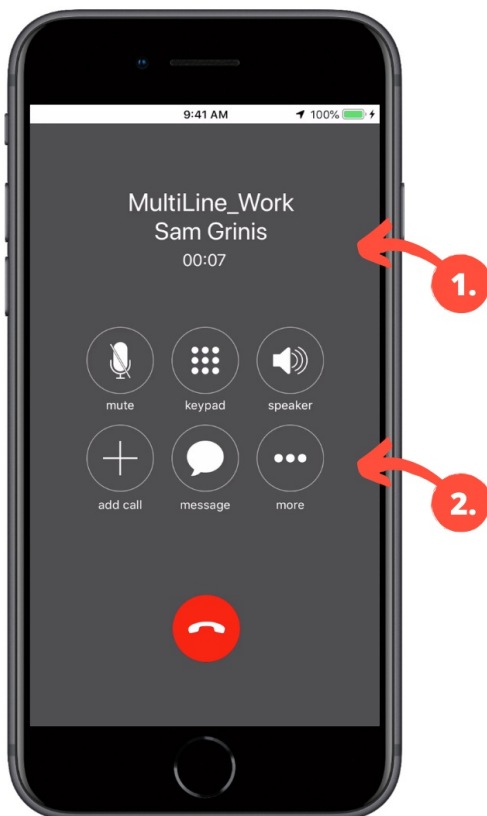
3. If you see this tab, you can choose to **make the call over Data or Minutes**
4. Tap the phone icon to make the call.

Make a call from your Recents screen



1. Go to your **Recents** tab in the navigation bar at the bottom of your screen (iOS) or top of your screen (Android)
2. Tap on the **i** icon to reveal details about that call
3. Tap on the number or contact name to make a call
4. See which connection type over which you will be making the call

Once you've made the call:



1. Check the Caller ID and call duration here

2. Mute your microphone, open your keypad, put the call on speaker, or message the caller and more
-

Call Settings: Set Data or Minutes calling modes

Last Modified on 10/31/2021 9:14 pm EDT

We want to ensure you stay connected with clients from anywhere. Our patented technology allows you to make and receive calls over wifi, data, and cellular regardless of your underlying carrier.

What is data mode and minutes mode?

Call over Minutes means MultiLine doesn't require an Internet connection for calls.

- You'll still need an Internet connection to send or receive messages.

Example #1: Using Minutes

If you use Minutes mode, MultiLine could work even if you're in a rural area with no access to an internet connection. You will make and receive calls over your carrier minutes plan AT&T, Verizon, T-Mobile, Vodafone, EE, etc...

Call over Data means MultiLine will use an internet connection for calls.

- When you turn on Wi-Fi for your phone, MultiLine will automatically use it for calling, messaging, and other functions.
- If you move outside Wi-Fi coverage, calls will seamlessly transfer to data.

Example #2: Using Data

If you use Data mode and are connected to your office Wi-Fi, and you walk outside the building and start driving in your car, your call will continue without interruption. Behind the scenes, MultiLine seamlessly transitions from Wi-Fi to your data network, so you won't ever have to worry about the call dropping.


MultiLine continuously monitors the quality of your data connection. Look for the colored dot next to the briefcase icon.

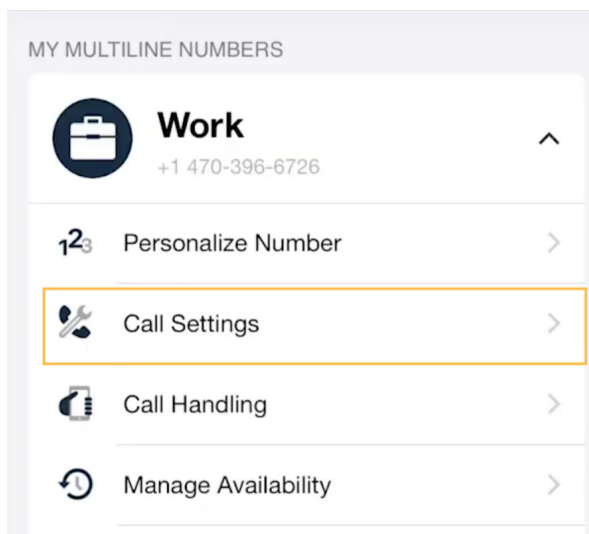
- If it is green, you have a good data connection
- If it is red, your connection is poor and the call quality may be affected when you use data; try switching to minutes
 - The red dot will also appear if you have Data and Wi-Fi turned off in your [Phone Settings](#).



How to set Minutes or Data mode

You can choose when to use data or minutes for calls in the [Settings](#) menu under [Call Settings](#).

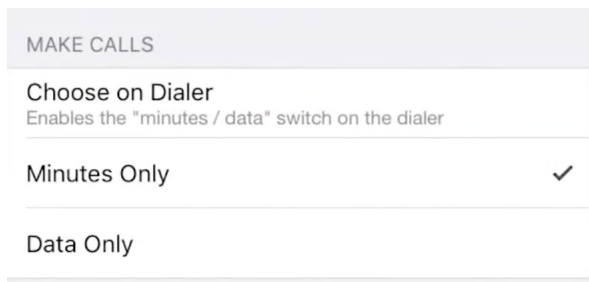
1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap **Settings**, then tap **Call Settings**.



You'll see three options for making and receiving calls.

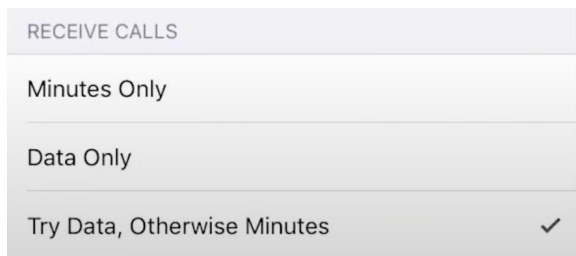
Make calls

Tap the checkmark to choose your setting. Your selection will automatically save when you exit the menu.



Receive calls

Tap the checkmark to choose your setting. Your selection will automatically save when you exit the menu.



Call Handling: Sequential and Simultaneous Dial, Do Not Disturb, Call Forwarding

Last Modified on 11/03/2021 7:18 pm EDT

Read on to learn about using MultiLine's Call Handling Settings.

Overview

You can use Call Handling in the MultiLine Settings menu to

- Set Simultaneous or Sequential Dial
- Set Call Forwarding
- Set a Business Hours Schedule
- Turn on Do Not Disturb

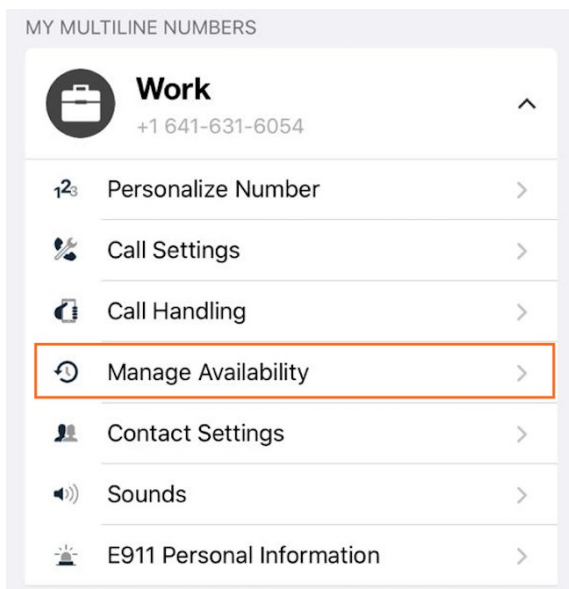
Before you start

- You need to be connected to the Internet to change your Call Handling settings.
- An organization can choose to turn this feature off. If so, you won't see Call Handling in the Settings menu.

Set Simultaneous or Sequential Dial

Use the Call Handling setting to designate multiple numbers for receiving incoming calls all at once (simultaneous), or one at a time in order (sequentially).

1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Go to **Settings** and tap **Manage Availability**.



3. Choose your desired Call Handling setting.


- **Sequential Ring:** Rings the primary MultiLine application and then ring each number one after the other listed in the Add Number list.
- **Simultaneous Ring:** Simultaneously rings all telephone numbers listed in the Add Number list, including your MultiLine number. The first phone to pick up receives the call.
- **Add Number List:** Input a list of numbers to be used by Sequential or Simultaneous ring. The maximum is 10 numbers.

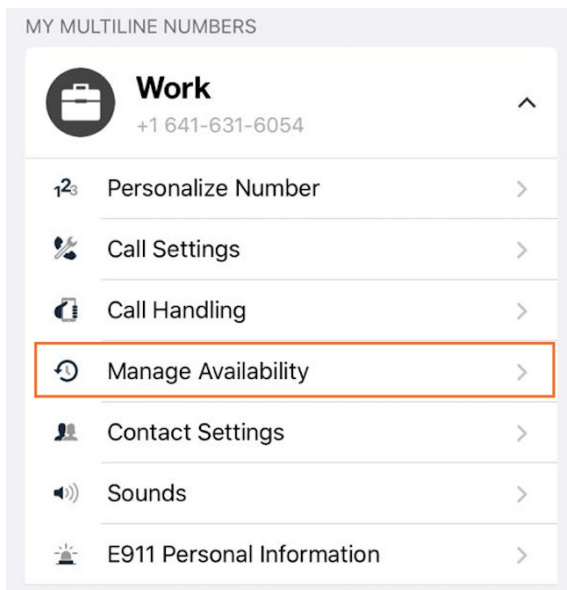
When you leave the menu your settings will automatically apply.

If you have Do Not Disturb or Business Hours settings applied, these rules apply first and your calls will go to voicemail instead of going to the numbers in the Call Handling list.

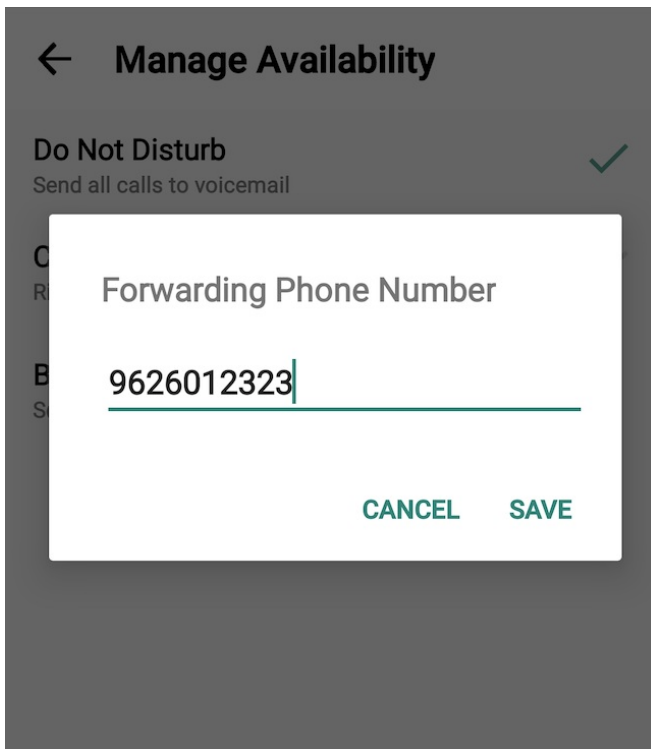
Set Call Forwarding

Use Call Forwarding to send calls to your MultiLine number to the specified number. Your MultiLine phone will not ring or receive the call when Call Forwarding is set.

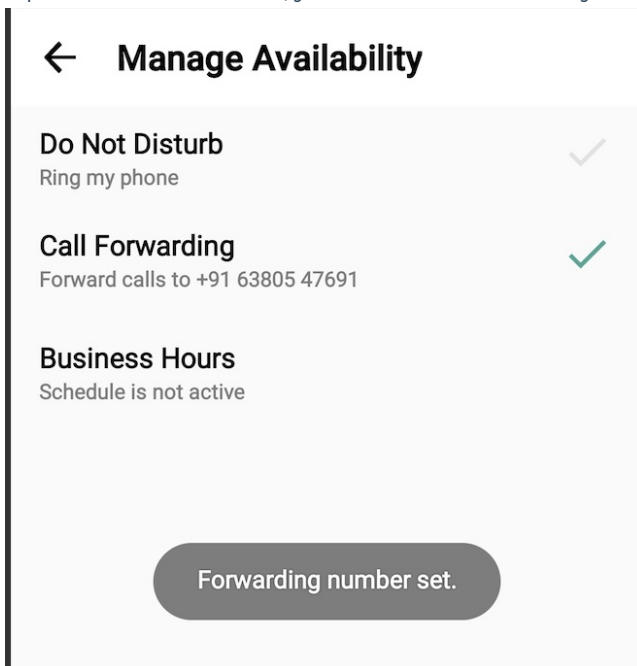
1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Go to **Settings** and tap **Manage Availability**.



3. Tap on **Call Forwarding** to enable it.
4. Enter the forwarding phone number



5. Tap Save. If successful, you'll see the number you set on the screen.




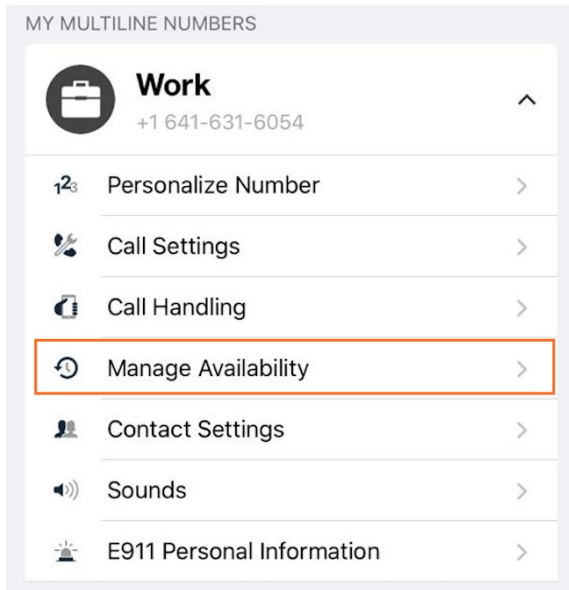
The forward function WILL NOT work if you enter your primary device's number as the call forwarding number.

Set Business Hours

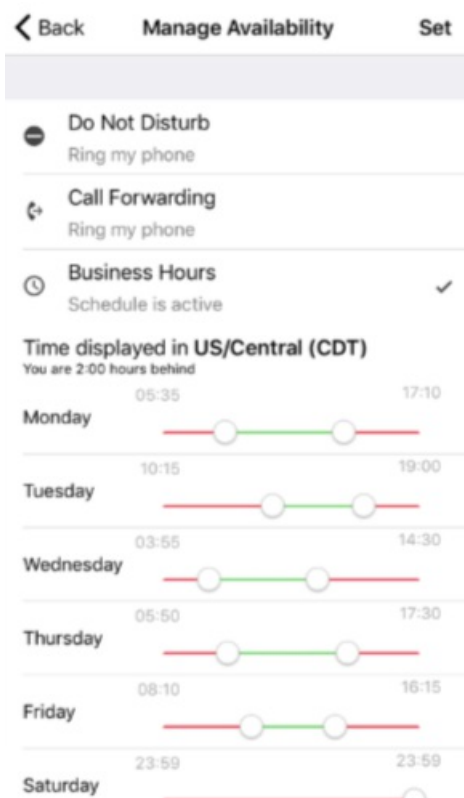
Use Business Hours to set which hours you would like your phone to ring. Outside of those hours,

calls will go to voicemail.

1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Go to **Settings** and tap **Manage Availability**.



3. Tap on **Business Hours** to enable it. *Tap again to disable it.*
4. Use the sliders to set the hours you're available on your MultiLine number. Any incoming calls that are received outside those set hours will automatically be forwarded to your MultiLine voicemail.




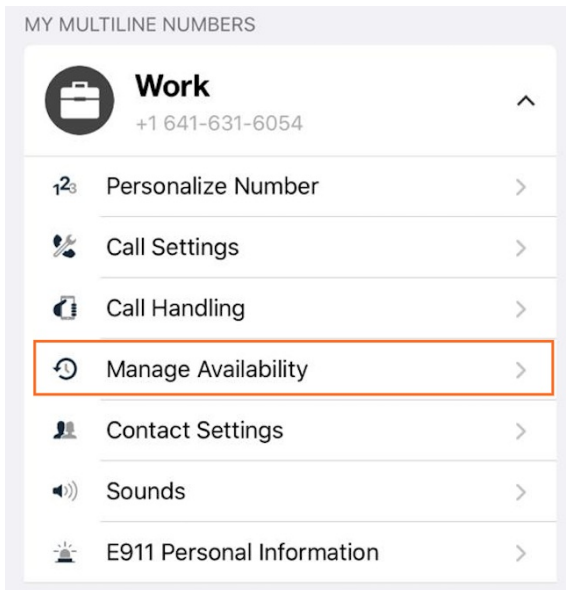
If you are using the **Call Handling** feature to set a list of numbers to simultaneously or

sequentially dial, the **Do Not Disturb** or **Business Hours** settings apply first and the calls will go to your voicemail and not ring the numbers on your **Call Handling** lists.

Set Do Not Disturb

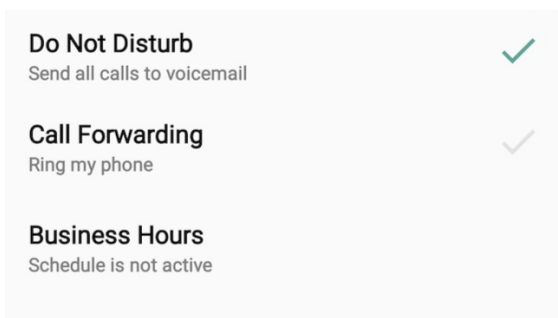
When **Do Not Disturb** is enabled, all the calls will be sent directly to your MultiLine voicemail.

1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Go to **Settings** and tap **Manage Availability**.



3. Tap on **Do Not Disturb** to enable it. *A checkmark will appear and the message will show that MultiLine will send all calls to voicemail. Tap again to disable it. The checkmark will disappear and the message will show that MultiLine will ring your phone.*

Manage Availability



If you are using the **Call Handling** feature to set a list of numbers to simultaneously or sequentially dial, the **Do Not Disturb** or **Business Hours** settings apply first and the calls will go to your voicemail and not ring the numbers on your **Call Handling** lists.



Sending and replying to SMS

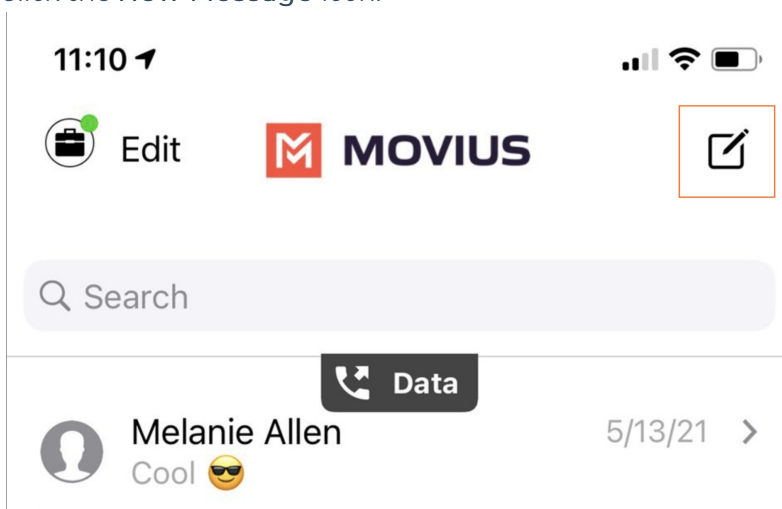
Last Modified on 10/31/2021 9:16 pm EDT

From the Messages screen, you can see your conversation history and compose new messages.

MultiLine supports group and picture messaging when enabled by your administrator.

How to compose a new SMS (iOS)

1. Go to Messages.
2. Click the New Message icon.



3. Enter a number manually, or type the name of an existing contact
Note: You must type at least 3 numbers or characters before results will appear. Tap a result to send start a conversation with that contact.
Note for Exchange Contacts users: This will not find all the contacts in the GAL, only ones that are stored in the app, or saved as a contact in Exchange. See [Search and Store Exchange Contacts](#) for how to store an Exchange contact.
4. The conversation screen with the contact appears. *Note: If you have never messaged with the contact, this screen will be blank. Later you'll see all the messages exchanged between you and them on your MultiLine number.*

5. Enter your message in the field and tap the Send  icon.

How to reply to SMS (iOS)

1. Go to Messages.
2. Click anywhere on a message to reply.
3. Enter your message in the field and tap the Send icon.

How to compose a new SMS (Android)

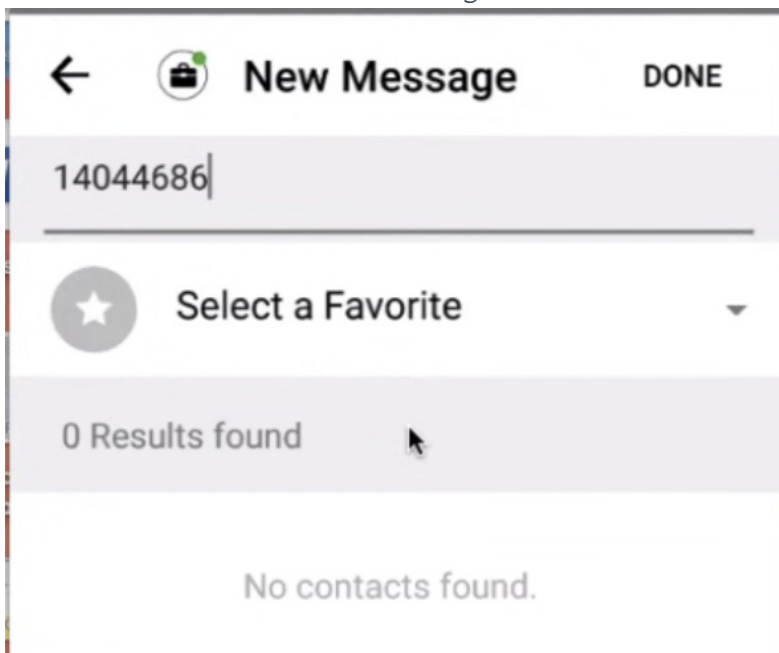
1. Go to Messages.



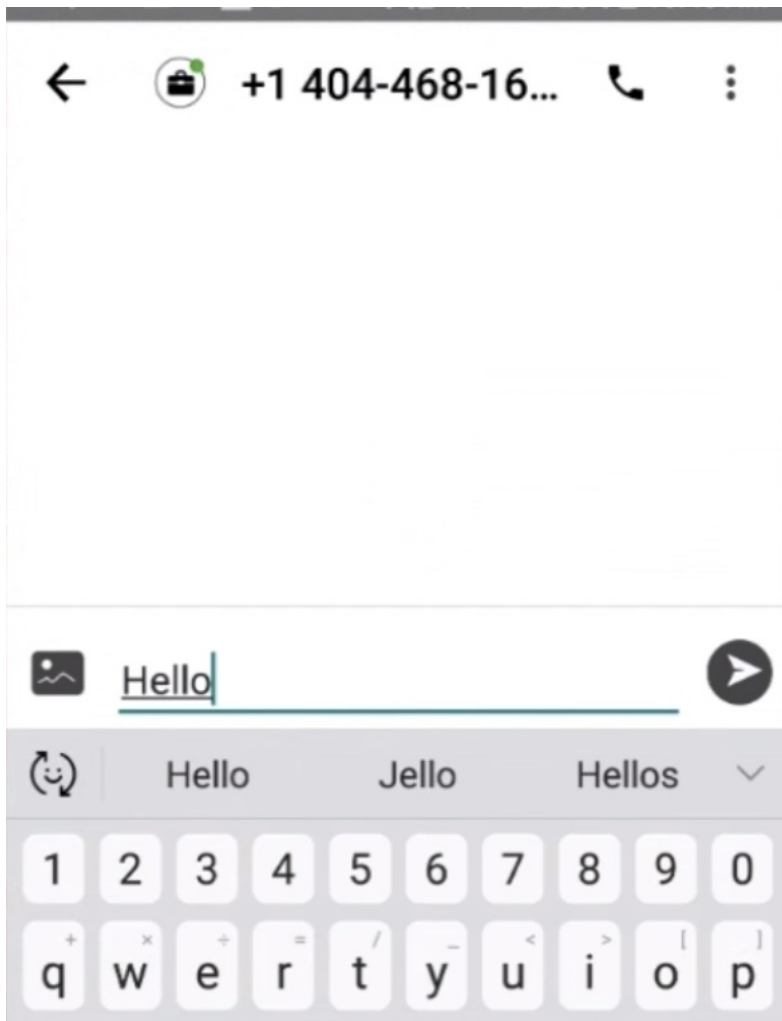
2. Tap the **Message** icon.
3. Enter a number manually, or type the name of an existing contact

Note: You must type at least 3 numbers or characters before results will appear. Tap a result to send start a conversation with that contact.

Note for Exchange Contacts users: This will not find all the contacts in the GAL, only ones that are stored in the app, or saved as a contact in Exchange. See [Search and Store Exchange Contacts](#) for how to store an Exchange contact.



4. The conversation screen with the contact appears. *Note: If you have never messaged with the contact, this screen will be blank. Later you'll see all the messages exchanged between you and them on your MultiLine number.*



5. Enter your message in the field and tap the Send

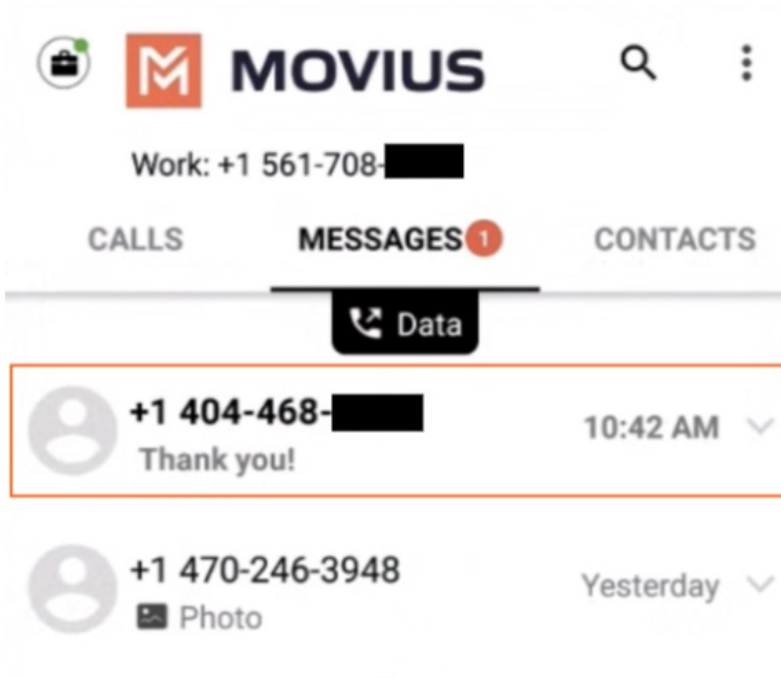


icon.

How to reply to SMS (Android)

1. Go to Messages.

Note: If you see an orange icon with a number indicates that you have that many Message Logs with new messages. The Message Logs with new messages will be in bold.



2. Tap your reply in to the field and tap the Send



icon.

Recording MultiLine voicemail greeting and listening to voicemails

Last Modified on 10/31/2021 9:17 pm EDT

Read this to learn how to record your voicemail greeting and listen to voicemails.

Overview


The MultiLine application provides you a separate voicemail to use for your business calling.

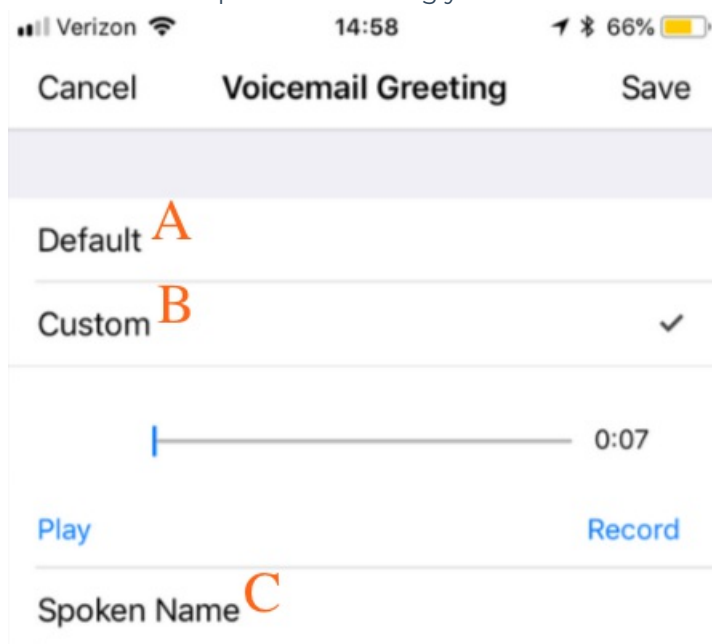
Before you start

- You need to be connected to the internet when updating your Voicemail greeting.
- Your organization can turn off voicemail features. If so, you may not see all the options described here.

Record your Voicemail greeting

Use **Voicemail Greeting** from the **Settings** menu to set up a voicemail greeting. You have three options: the default message, a custom message, and a message that includes audio of you speaking your name.

1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap **Settings**.
3. Tap **Voicemail Greeting**.
4. You have three options for setting your Voicemail Greeting:



A. **Default:** This application comes with a default setting that callers will hear when leaving a voicemail. For an example MultiLine number "+15555555555", the greeting is "You have reached +15555555555, please leave your message after the tone".

B. **Custom:** Allows the user to set a customized voicemail greeting. Once you have recorded a voicemail greeting, you can hit **Play** to listen to it, or **Record** if you want to re-do it. This can be

done or redone at any time.

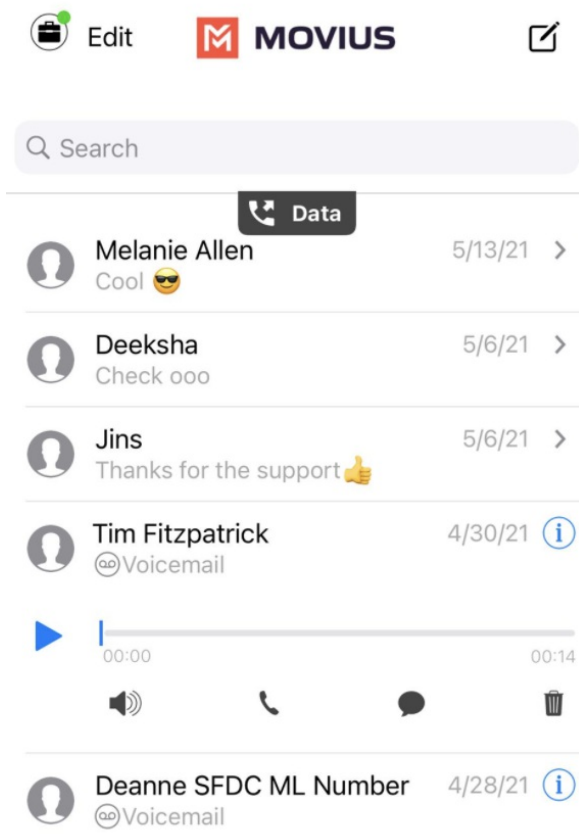
C. **Spoken Name:** Allows the user to record their name. Once you have recorded your name, you can hit **Play** to listen to it, or **Record** if you want to re-do it. This can be done or redone at any time.

Listen to Voicemails

Movius MultiLine has embedded voicemail allowing callers to leave a message.

iOS

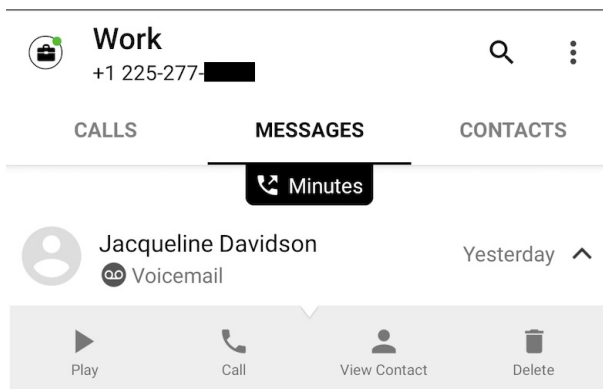
1. Go to the Messages tab.



2. Voicemail messages are indicated by Voicemail icons. Tap anywhere to expose the options.
3. Click the **Play** icon to play the message.
 - The speaker icon lets you play the Voicemail on speaker phone.
 - The phone icon lets you call the party back.
 - The speech bubble icon lets you message the party back.
 - The trash icon lets you delete the message.
 - The info icon will pull up the Contact Details page, where you can see history with the contact or WhatsApp message the party back.

Android

1. Go to the Messages tab. *Voice messages are indicated by a voicemail icon.*



2. Click the menu down arrow to expose the options.
3. Click the **Play** icon.

You can also call back, message back, view contact (see call history and Whatsapp message back) or delete the voicemail from this screen.

Getting consent to message using Opt-In flow

Last Modified on 11/03/2021 7:29 pm EDT

Read this to learn how the Opt-In Flow collects consent for MultiLine users to send SMS or instant messages to users.

Overview

Many regulated users must get consent from their clients to start text messaging conversations. MultiLine automates this process for you, ensuring that any time you are messaging with a number for the first time that your organization will collect their consent to be sent messages.

Before you start

- Your organization determines whether you have SMS Opt-In turned on.
- Using WhatsApp Messaging Connector requires Opt-In.

SMS Opt-In Flow

- Default messages are provided in the scenarios below. Your organization may configure the messages differently.
- You or the client can initiate the opt-in flow.

MultiLine User initiates the Opt-In Flow

When you try to message a client at a number that you haven't messaged with previously, the customer will receive a notification message requesting they accept or reject the Opt-in process.

- **Default:** [Auto Message] is trying to reach you. As per company policy, you must provide your consent to continue messaging. To Opt in, reply YES. To opt out, reply STOP.
- **Note:** will show your name as it was submitted by the MultiLine Admin in the MultiLine Management Portal.

You will also see a message letting you know the customer has been requested to accept the Opt-in.

- **Default:** [Automated Message]: Your contact has been sent a request to Opt-in. Once they accept, you will be able to message with your contact.

When the customer accepts the opt-in request by replying to the message with YES, you'll receive a notification letting you know you can begin messaging with each other.

- **Default:** [Auto Message]: Your Contact has opted in. You may continue to send/receive messages.

The customer will also receive a notification letting them know you can begin messaging with each other.

- **Default:** [Auto Message]: Opt in confirmed. If you wish to opt out at any time, reply STOP

Opt-Out Flow

The client can choose to reject messaging at any time by replying to the message conversation with STOP.

If the client opts out, you'll see a notification letting you know you can no longer message with the client.

- **Default:** [Auto Message]:Your contact has opted out. No further messages can be sent to this contact until they have provided their consent again.

The client will also see a message letting them know they have successfully opted out and how to undo their decision, if desired.

- **Default:** [Auto Message]: Opt out confirmed. If you change your mind, please reply with a new message.

Client initiates the Opt-In Flow

When a client tries to message you first, and you haven't messaged together previously at that number to establish opt-in, the client will automatically see a notification message. The notification is a request to accept or reject the Opt-in process.

- **Default:** [Auto Message] You are trying to reach . As per company policy, you must provide your consent in order for your message to be delivered. To opt in, reply YES. To opt out, reply STOP.
- **Note:** will show your name as it was submitted by the MultiLine Admin in the MultiLine Management Portal.

You will also receive a notification letting you know that the client has tried to contact you.

- **Default:** [Auto Message] A contact has attempted to send you a message. As per company policy, they have been sent a request to opt in. Once confirmed, you will be able to send/receive messages.

When the customer accepts the opt-in request by replying to the message with YES, you'll receive a notification letting you know you can begin messaging with the customer.

- **Default:** [Auto Message] Your Contact has opted in. You may continue to send/receive messages.

The customer will also receive a notification letting them know you can begin messaging with each other.

- **Default:** [Auto Message] Opt in confirmed. To opt out at any time, reply STOP. Note: Employee name is a variable, and will be picked by the system.

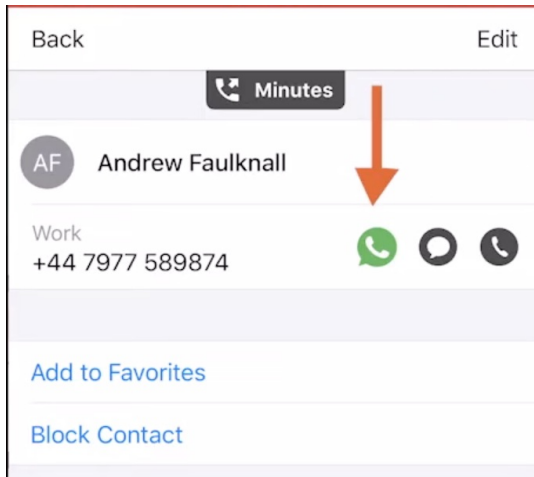
WhatsApp Opt-In Flow

Refer to this topic to learn what to expect when you initiate a new WhatsApp conversation.

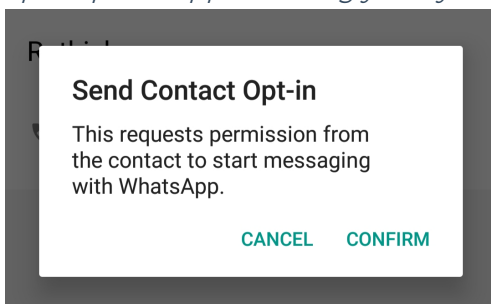
You can only send WhatsApp messages to users in your contacts. If you need help setting up your contacts, see [Add Contacts](#).

When you try to send a message to a client with WhatsApp for the first time, you're required to get consent using an Opt In process.

1. To start a new WhatsApp conversation, find your contact and click the WhatsApp icon.



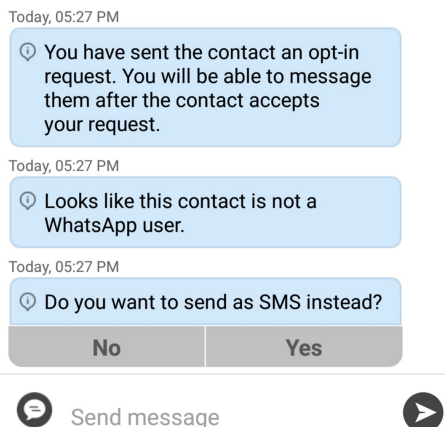
1. A prompt will appear asking you if you'd like to send the contact an Opt In message.



2. Click **Confirm** to send the Opt-In. There are four possible outcomes:

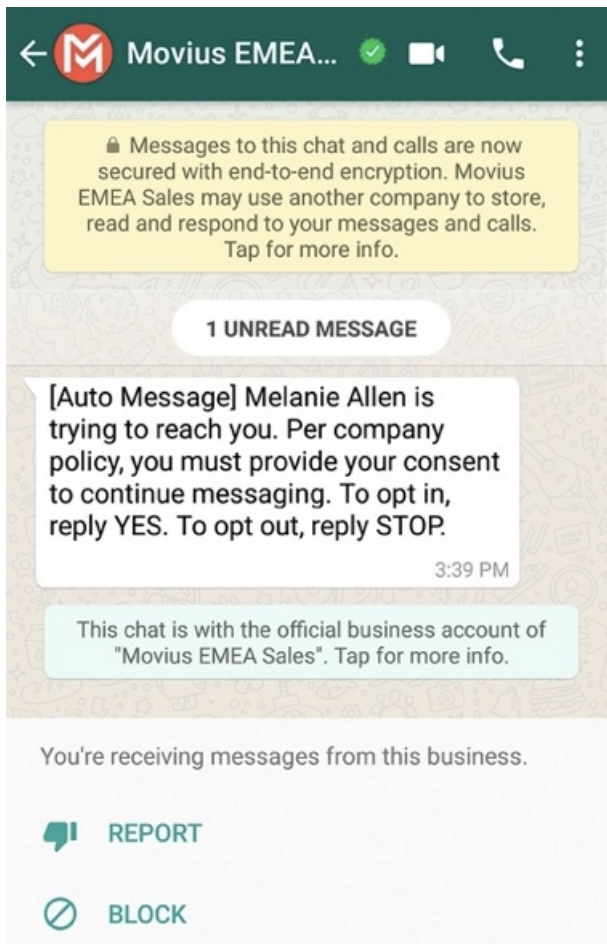
1. *Contact doesn't have WhatsApp*

1. You'll see a message letting you know your contact isn't a WhatsApp user, and ask if you'd like to send an SMS instead.



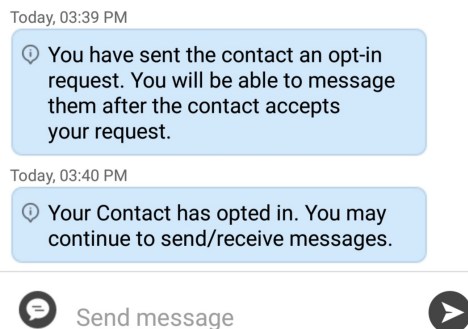
2. Select **Yes** to go to the SMS message screen. Select **No** to return to contacts.

2. *Contact has WhatsApp- customer receives opt-in request*

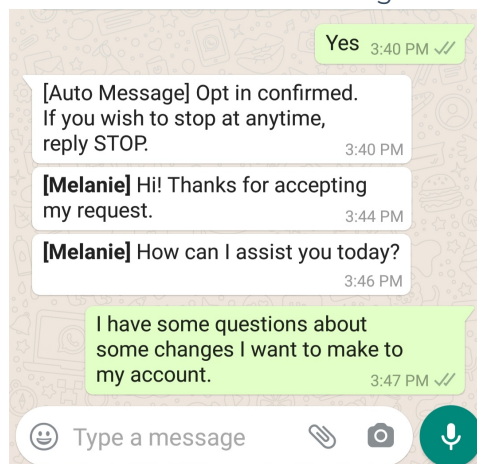


1. *Contact accepts Opt-In request*

1. You'll see a confirmation message letting you know the contact has chosen to opt-in.

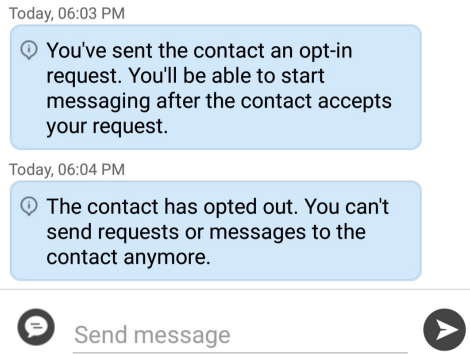


2. Your contact will see a message letting them know they've opted-in.



2. Contact rejects Opt-In request

1. If your contact rejects the Opt-In, you'll see a message letting you know. The message templates and send message field will be disabled for the contact.

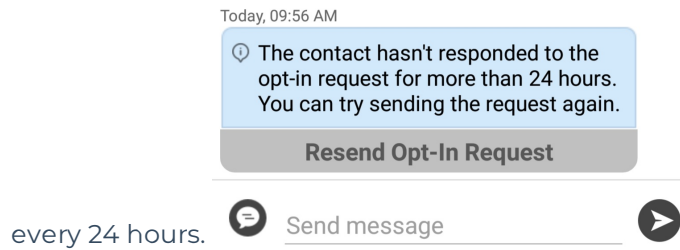


2. The customer will be informed of their Opt-Out status, and that it is possible to Opt-In at any time by replying "yes".



3. Contact doesn't respond to Opt-In request

1. If your contact doesn't respond to the Opt-In, you'll be able to send a new one



Using MultiLine Contacts list

Last Modified on 10/31/2021 9:18 pm EDT

Overview


- The MultiLine app provides you a separate contact list to use to make your business calls. We offer three options for starting your Contacts list:
 - Exchange Contacts: connect to an Exchange server, such as Outlook or BlackBerry Exchange; two-way sync means contacts added or updated in MultiLine or Exchange server will update both lists.
 - Local Contacts: manually add contacts in a list that exists only within the MultiLine app.
 - Native Contacts: sync with the Contacts app on your personal device or within the EMM container; two-way sync means contacts added or updated in MultiLine or Contacts app will update both lists.
- Once you set up your Contacts list, any contacts will appear on the Contacts screen. You can:
 - Tap a contact to see options for calling and messaging them
 - View, add, and update contacts

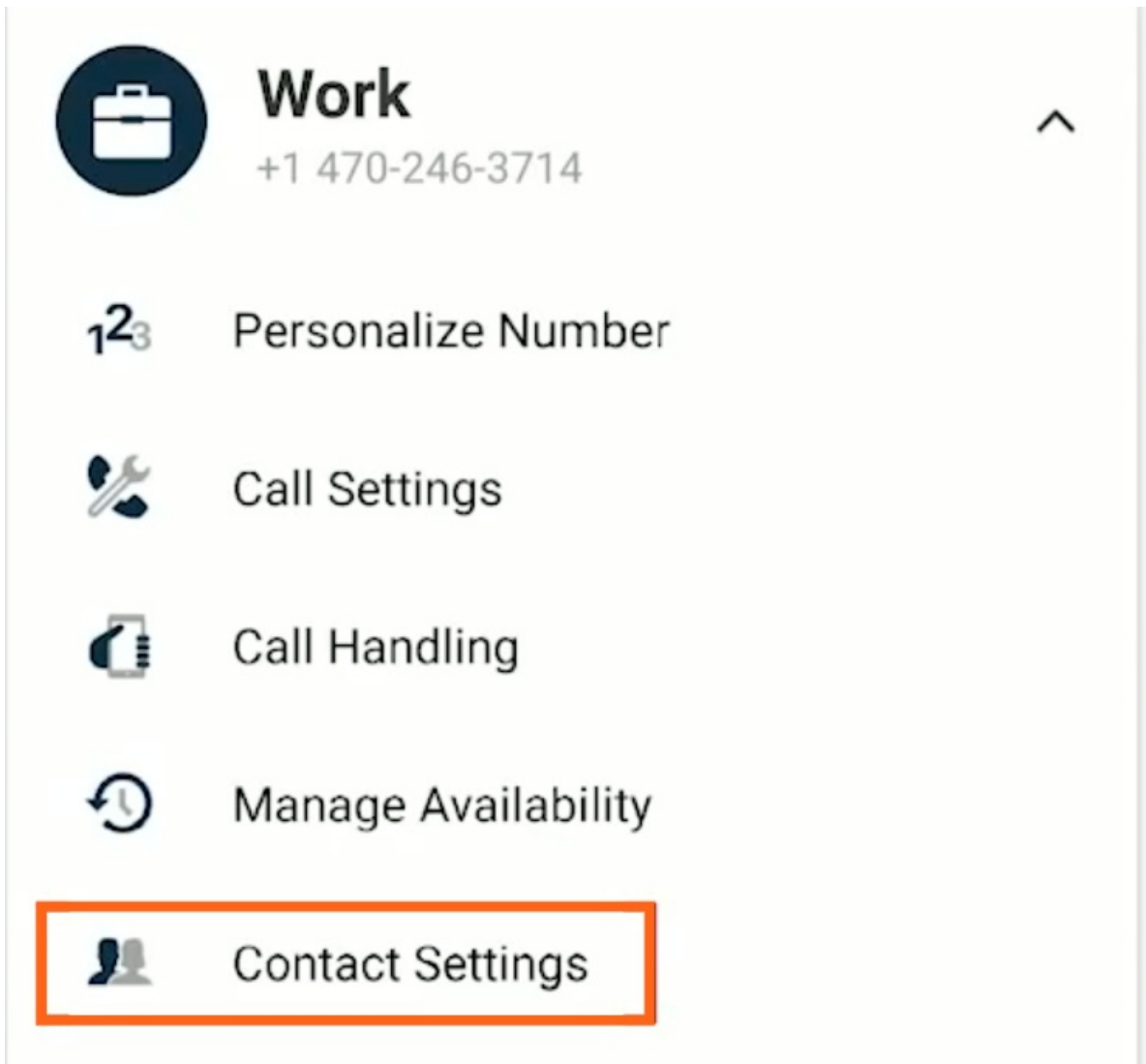
Before you start

- If your organization chooses to restrict the type of Contacts setting you can use, you may not see certain Contact Source options.
- We recommend Exchange Contacts for the best experience with MultiLine Desktop.

How to choose your Contact Setting

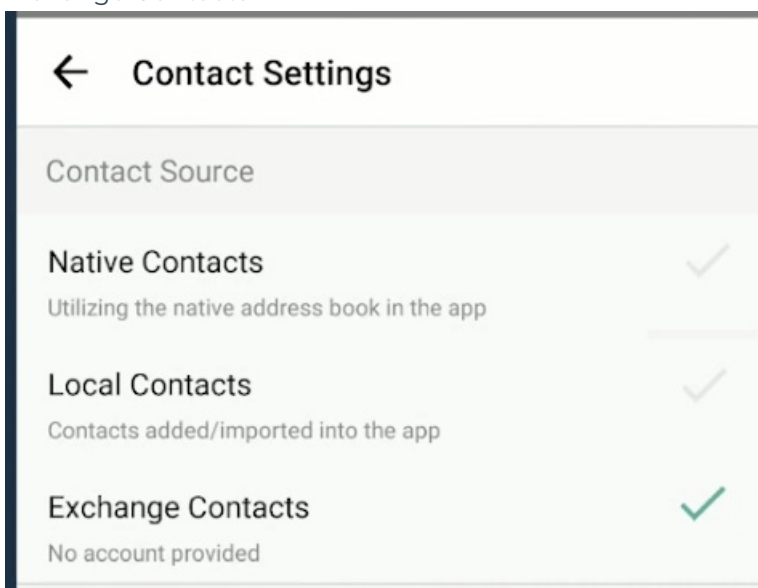
You have options for sourcing, sorting, and displaying contacts. You'll need to choose your **Contact Source** in **Contact Settings** before you begin adding contacts.

1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap **Settings**.
3. Tap **Contact Settings**.



Select your chosen contact source:

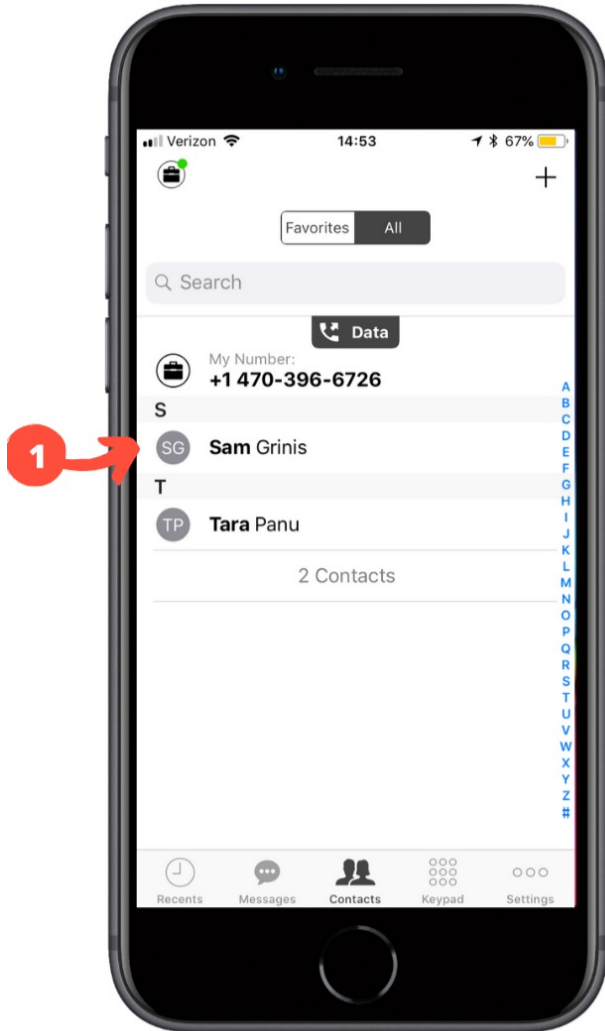
- Native Contacts
- Local Contacts
- Exchange Contacts



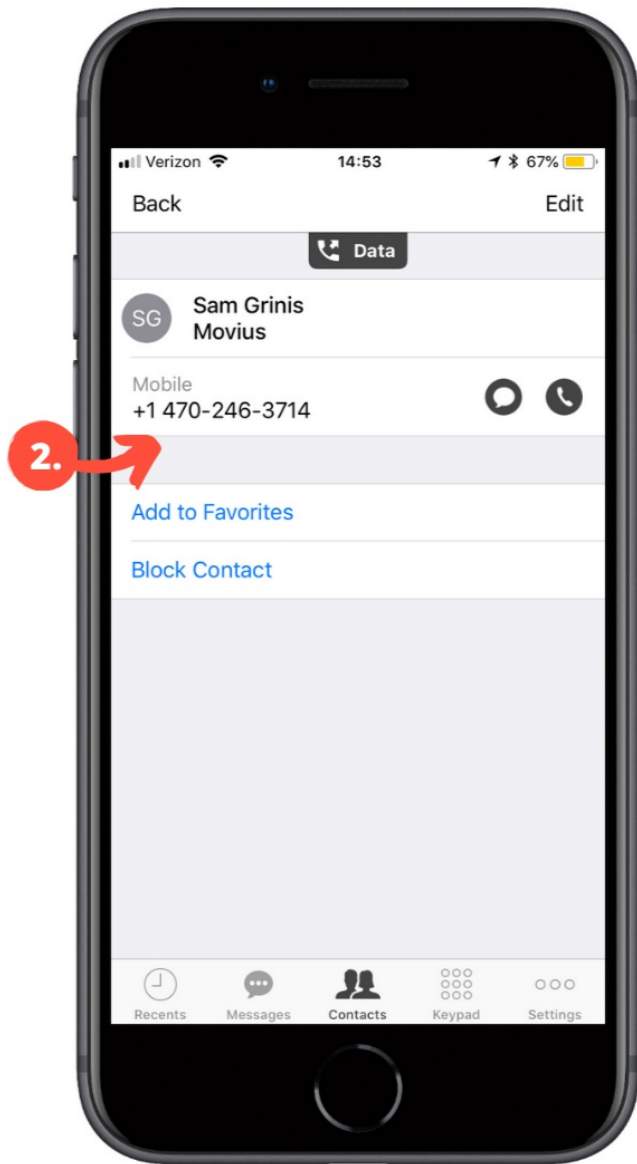
View a contact

To view, edit, delete, or message contacts, you must have at least one contact.

1. The **Contacts** tab displays all contacts in alphabetical order by default.



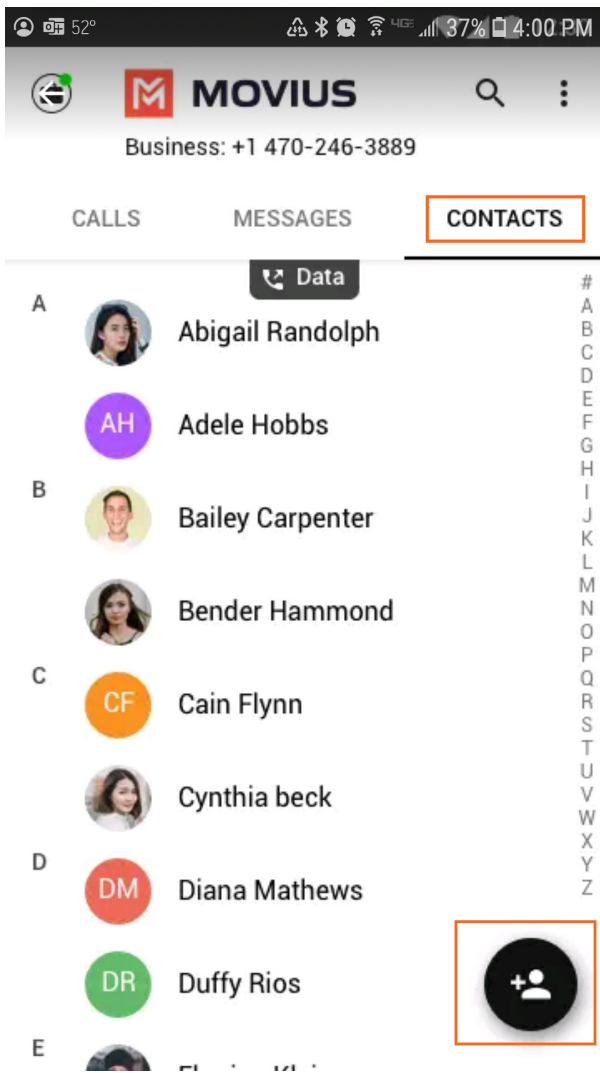
2. Clicking on any contact will bring you to that contact's information page, where you can call, message, favorite, or block the contact.



3. Clicking on the **edit** button in the top right-hand corner allows you to choose to delete or edit, the selected contact.

Add a contact

It's easy to add contacts in the MultiLine application.



1. Go to the **Contacts** tab.
2. Click the **Add Contact** button.
 - Fill out as many details as desired:
 - First name
 - Last name
 - Phone
 - Email
 - Address
 - Clicking "Add Phone field", "Add Email field", or "Add Address field" will let you associate multiple phone numbers, email addresses, and addresses for the contact. You can choose labels for each field.

During onboarding, you should have chosen your Contact Settings, your contacts will either be sourced from an Exchange server, your native device, or locally in MultiLine. See below for details on how adding contacts works for the different settings.

Add a contact - Using Exchange server

- Using the **Exchange Contacts** option means MultiLine gets your contacts from a corporate exchange database.
- Any changes made to the corporate exchange (adding, renaming, deleting, etc.) will automatically be reflected in the MultiLine app and vice versa.

- You'll be able to search for any contact from the Global Address List (GAL), your company's list of all employees. However, the full GAL will not show up in the list of contacts for performance reasons.

Add a contact - Using native device

- Using the Native Contacts option means MultiLine uses the same contacts list as your native phone.
- Any changes made to your native Contact List (adding, renaming, deleting, etc.) will be reflected in MultiLine and vice versa.

Add a contact - Using local contacts

- This is the default contact setting.
- Using the Local Contacts option means your contacts exist within the MultiLine app only.
- You can choose to do a one-time import from your native device and/or manually add contacts yourself.
 - Changes made in MultiLine (adding, renaming, deleting, etc.) will NOT be reflected in your native contact list, and vice versa.
 - There is no automated syncing between the Native and Local Contact Lists.

NOTICE: Local Contacts aren't backed up or stored outside the application, so they can be lost if you lose your device or need to reinstall MultiLine.

*NOTICE: if you create your Contact List using Local Contacts, and then switch your source to Native or Exchange, the contacts you created **will be deleted**.*

Update contact with a new number

If you have a contact that calls you from a new number you can update that contact with the new number.

iOS

1. Go to **Calls**.
2. Tap the blue information icon for the unknown number.
3. Tap **Update**.
4. Enter the name or number of the existing contact you want to update.
5. The new number will be added.
 - From this screen you can change the label, if desired.
 - If you need to delete the previous number, tap the x and confirm.
6. Tap **Save**.

Android

1. Go to **Calls**.
2. Tap the down arrow for the unknown number.
3. Tap **Update**.
4. Enter the name or number of the existing contact you want to update. *Note for Exchange Contacts users: this does not search the entire GAL.*
5. The new number will be added.

- From this screen you can change the label, if desired.
 - If you need to delete the previous number, tap the x and confirm.
6. Tap **Save**.

Add a Favorite contact

You may want to add contacts that you're in touch with more frequently to your favorite contacts. This makes it easier to start new calls or messages with them.

To add a contact to your favorites

1. Go to the **Contacts** tab.
2. Click your contact to open the **Contact** details.
3. Click the **Star** in the upper right-hand corner.

After you've added a contact to your contacts, you will see the Star on their icon.

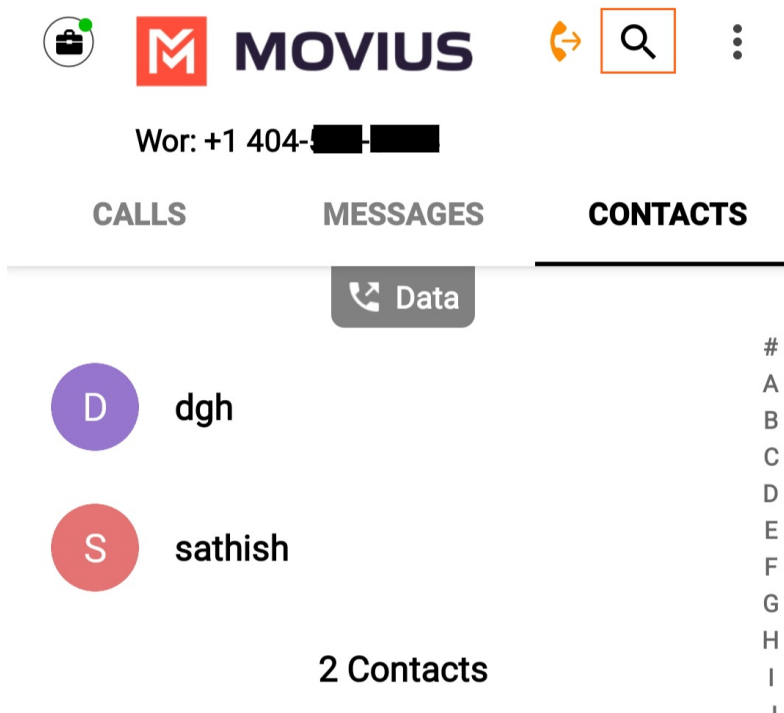
Exchange Contacts: Search and Store

Last Modified on 11/03/2021 5:20 pm EDT

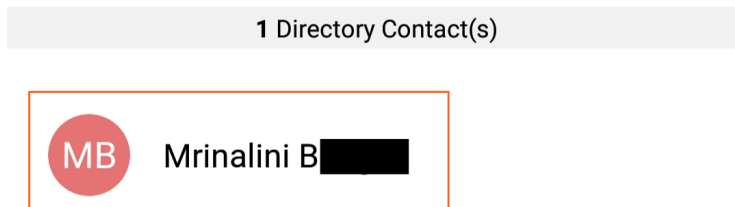
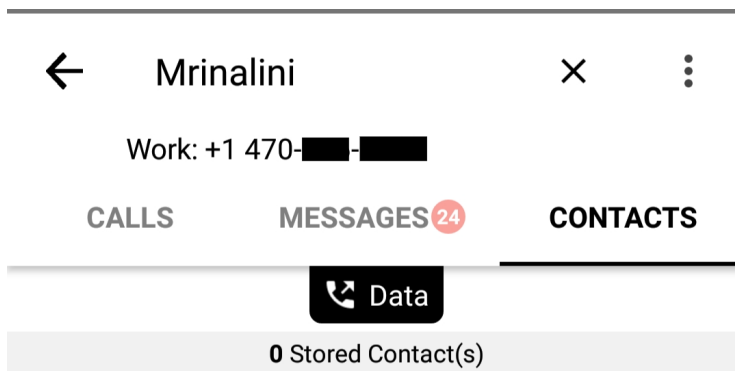
When you're using Exchange contacts, you'll be able to search for any contact from the Global Address List (GAL), your company's list of all employees. However, the full GAL will not show up in the list of contacts for performance reasons. Therefore, you may want to store the contacts you contact often.

How to search and store a contact from Exchange

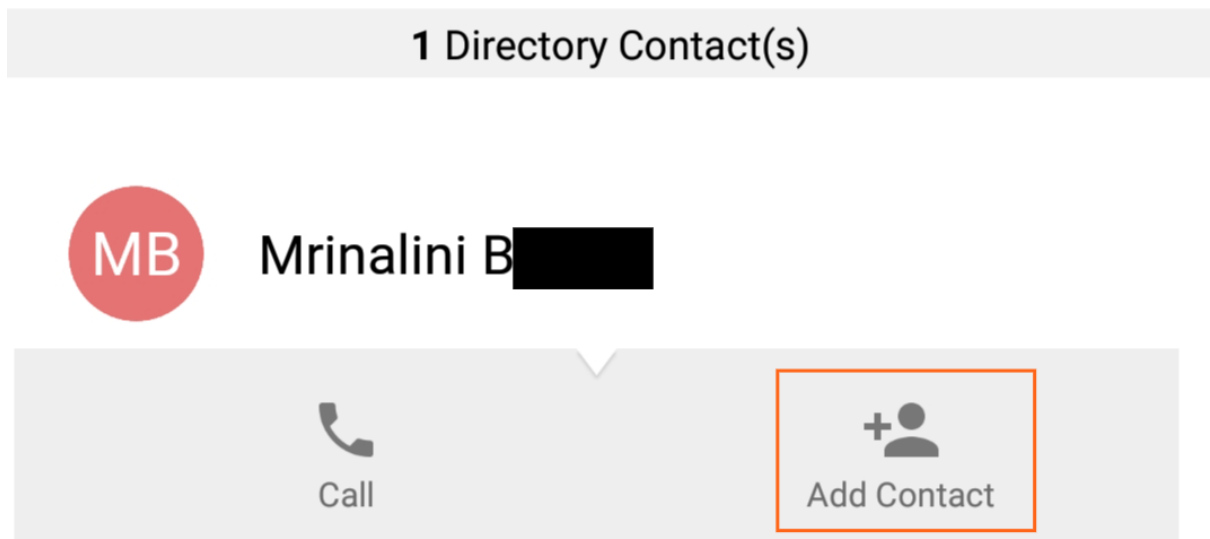
1. To search for a contact, tap the Search icon and enter the name or number of the contact you want to look up.



2. Your result will be displayed in two categories Stored Contacts and Directory Contacts. To store the directory contact, tap the result.



3. Tap the Add Contact button. Now this contact is a Stored Contact and will appear in the Contacts tab.



You may also wish to [add contacts to your Favorites list](#).

Edit ringtone and notification preferences

Last Modified on 10/29/2021 1:11 pm EDT

Read on to learn how to change the notification/ring sounds on your MultiLine in your settings.

Overview


You can set separate notification sounds for receiving calls and texts on MultiLine when using Data mode.

Before you start

- If you're using Minutes mode, MultiLine will use the notification and ring sounds that are set in your Phone Settings.

Edit ringtone and notification preferences

You can change the notification/ring sounds on your MultiLine in your settings.

1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap **Settings** then tap **Sounds**.
 1. To change the ring for Data calls, click **Ringtone (for Data calls)** and select a ringtone.
 - Select **Silent** to silence your Ringtone.
 2. To change the message notification click **Message Notification**, and select a notification sound.
 3. To change the voicemail notification, click **Voicemail Notification** and select a notification sound.
 4. To add a vibration alert for calls and messages, tap to turn on the toggle. Tap again to remove vibration alert.

[← Back](#)

Sounds

Ringtone (for Data Calls) Default >

Vibrate on call

Message notification Fly >

Vibrate on new message

Voicemail notification None >

Vibrate on new voicemail

Set the default country calling code

Last Modified on 10/29/2021 1:32 pm EDT

Read on to learn how to set the default country calling code.

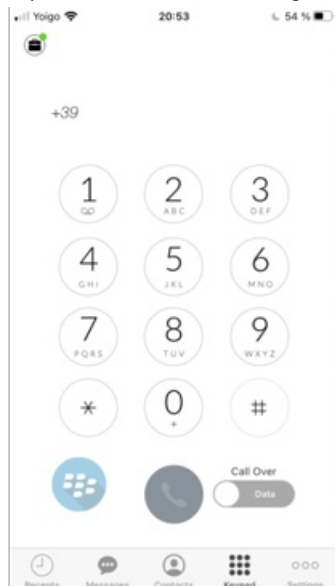
Overview

A country calling code, or country dial-in code, is a prefix dialed before the telephone number when placing an international call. For example +39 is the calling code for Italy. By default, the prefix will reflect the country code of your MultiLine number.

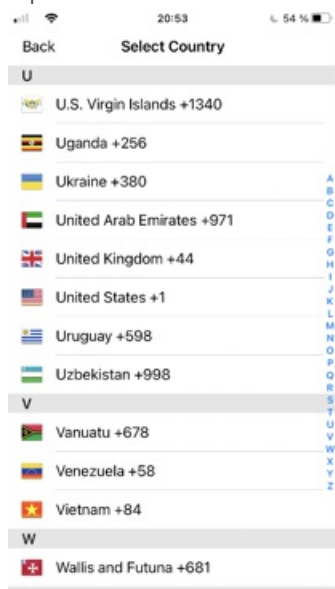
Set the default country code

Mobile

1. Open the dialer.
2. Tap the current country code (example below: +39).



3. Tap from the list to select the desired country calling code.



Desktop

Desktop does not assume any given country code. You should always include the country code when adding contacts, dialing numbers, or entering numbers to text.

Using MultiLine for Intune

Last Modified on 10/31/2021 9:19 pm EDT

What is MultiLine for Intune?

MultiLine for Intune is a secure, carrier-agnostic business application that enables employees to compliantly communicate with external clients through a separate business number on their own personal devices, specially built to be managed by Microsoft Intune. This version of MultiLine allows IT and mobility managers to secure their client communication data while ensuring employees are not using their personal number or other consumer messengers for business communications.

MultiLine for Intune works over any iOS/Android device and can be deployed over any global carrier. MultiLine's patented technology allows employees to make and receive calls on their business number over WiFi, mobile data and/or GSM (not VoIP-only) ensuring employees are always accessible and connected with their clients no matter where they work.

- **Authenticate the same way you do other Work apps**

- Access MultiLine with the corporate credentials you use for Outlook or Office 365.
- If applicable, download MultiLine from corporate-protected App or Play store.

- **One-click sync to Exchange contacts**

- MultiLine for Intune automatically detects the Exchange contacts associated with your email ID.

- **Automatic phone number recognition**

- Whenever a phone number appears in your managed apps—within an SMS or messaging program, in an email, in the browser, the number will be rendered as a clickable link. Tap the link and the MultiLine for Intune call screen will automatically appear to make the call.
-

Using Movius for BlackBerry

Last Modified on 10/31/2021 9:19 pm EDT

Read on to learn the Movius for BlackBerry's unique integration features.

Overview

Movius for BlackBerry is a MultiLine mobile app that specially integrates with BlackBerry UEM.

Before you start

- To learn how to activate and set up your app, refer to the MultiLine Getting Started Guide.
- This guide assumes the BlackBerry administrator is using our recommended settings to enforce separation of business and personal.

Dynamics Launcher Integration

The Movius for BlackBerry client is registered with the BlackBerry Dynamics Launcher, therefore, appearing in the list of available Dynamics apps when the user hits the blue floating launcher button to open the Dynamics Launcher overlay screen.



BlackBerry Exchange Contacts

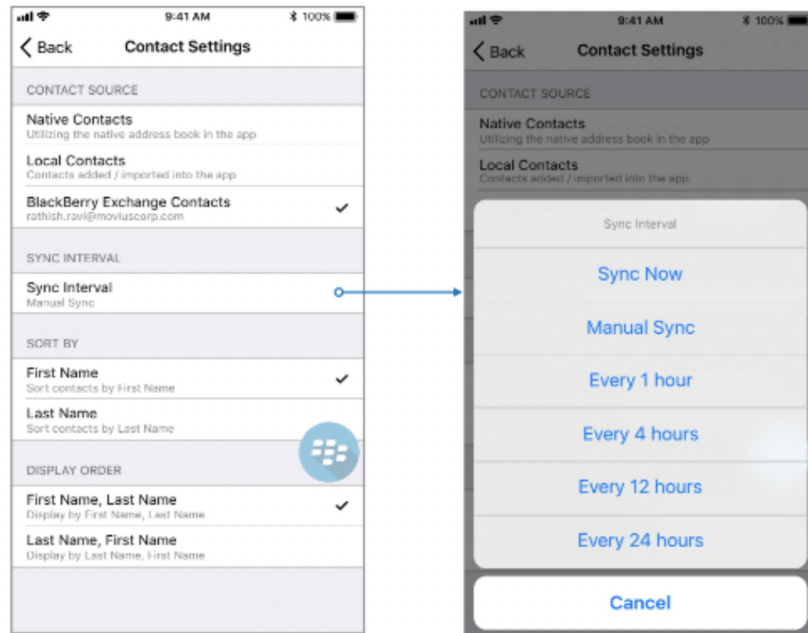
Most Movius for BlackBerry users will use BlackBerry Exchange Contacts.

1. Tap the menu icon  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap Settings.

3. Tap Contact Settings.

4. Tap Exchange Contacts.

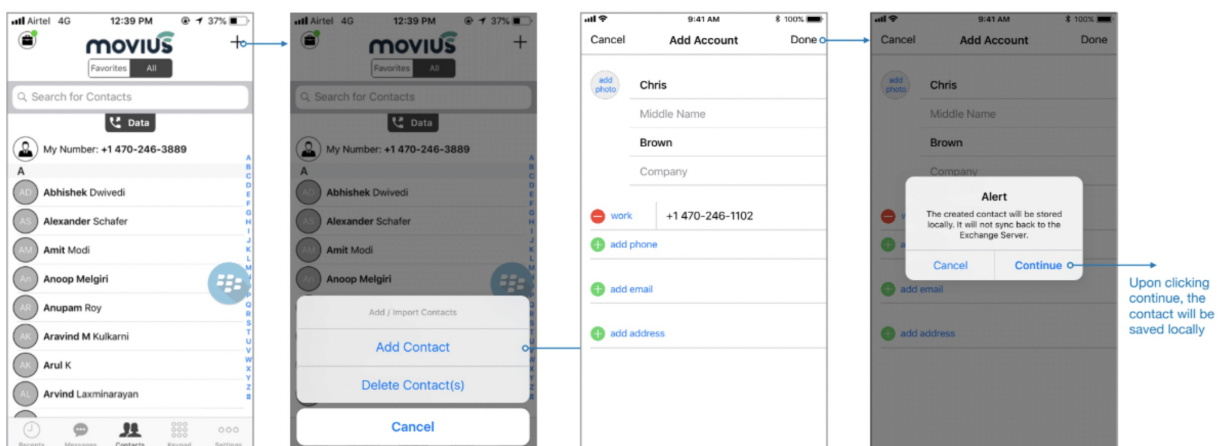
- Once you select BlackBerry exchange contacts the sync will begin and you'll soon have access to your contacts.
- If you'd like to change how often your contacts sync with the exchange server, tap **Sync Interval** and choose your preference.



Note: If you created contacts while using Local Contacts or Native Contacts before switching to Exchange, these contacts will be deleted.

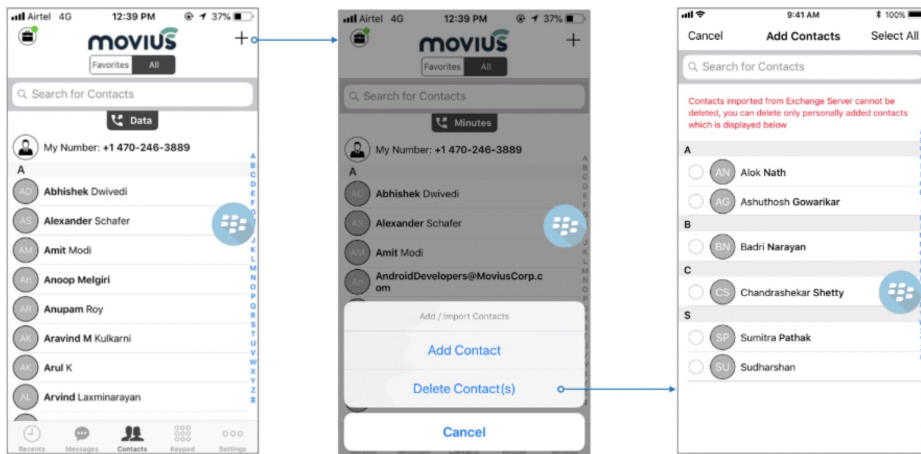
Add contact

If you add a contact on your device locally it won't be synced or created on exchange server. You can modify locally added contacts in Movius for BlackBerry but cannot modify imported contacts.



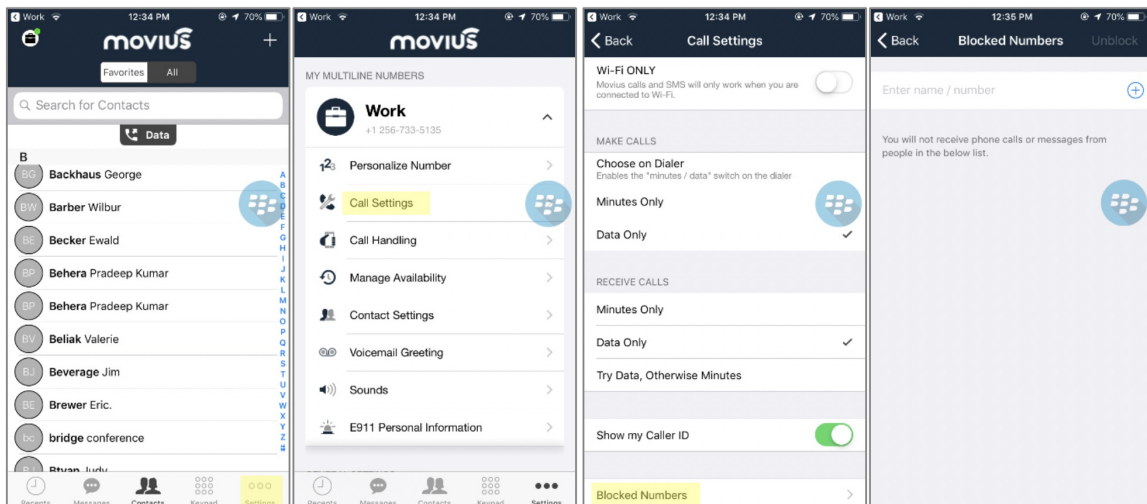
Delete contact

If you try to delete a contact from Movius for BlackBerry, the client will show an error message. You can't delete an imported contact; only locally saved contacts.



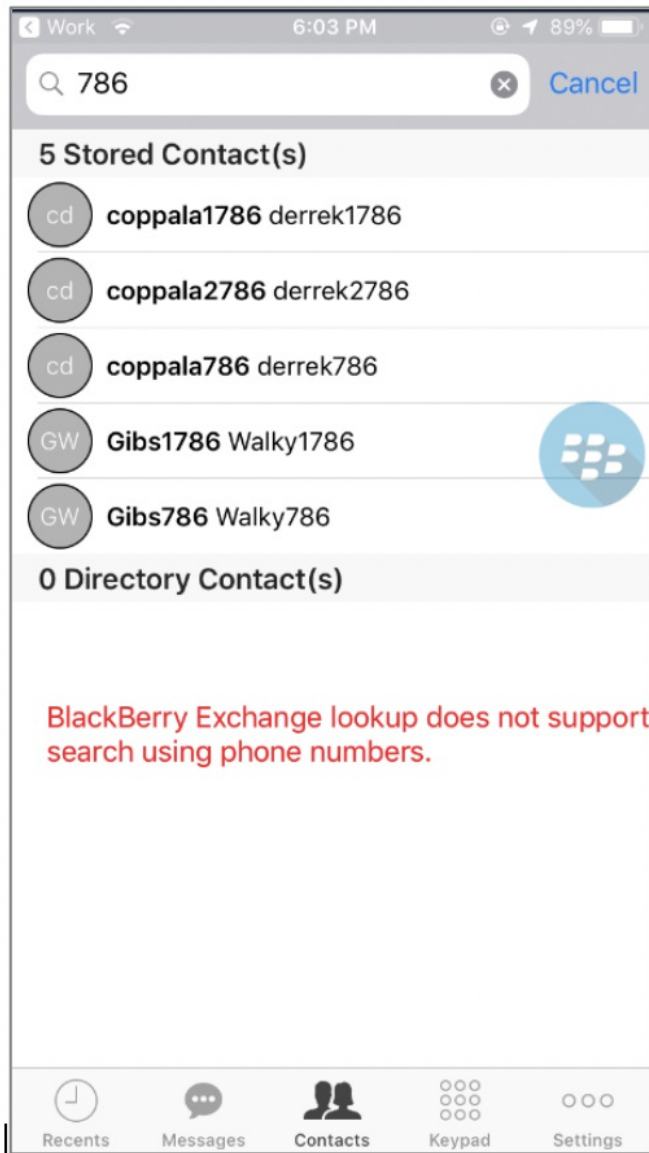
Block contact

You can add a contact (local/exchange) or a number to the Blocked Number list. You won't receive any calls or messages from the blocked number.



GAL Look up

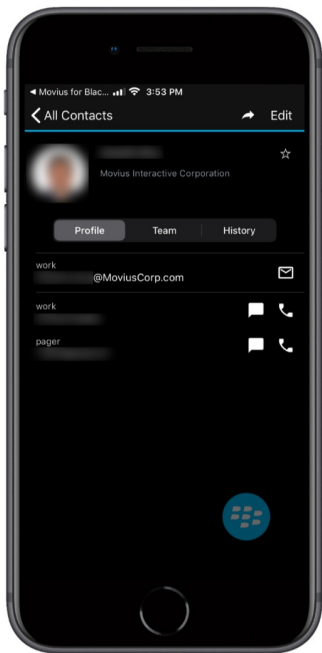
Global Address List (GAL) doesn't allow search for a contact by contact number. If you search for a contact using a number, you'll see a notification message. You can search for a contact using First Name, Last Name, Display Name, Full Name, Alias and Email fields.



Call or text contact

Calling or texting a Contact using the Movius for BlackBerry client directly from the BlackBerry Work Contacts application:

Open a BlackBerry Work Contact and hit the phone number for that contact, or the phone icon beside the number. The Movius for BlackBerry client will call the number directly; as shown below:

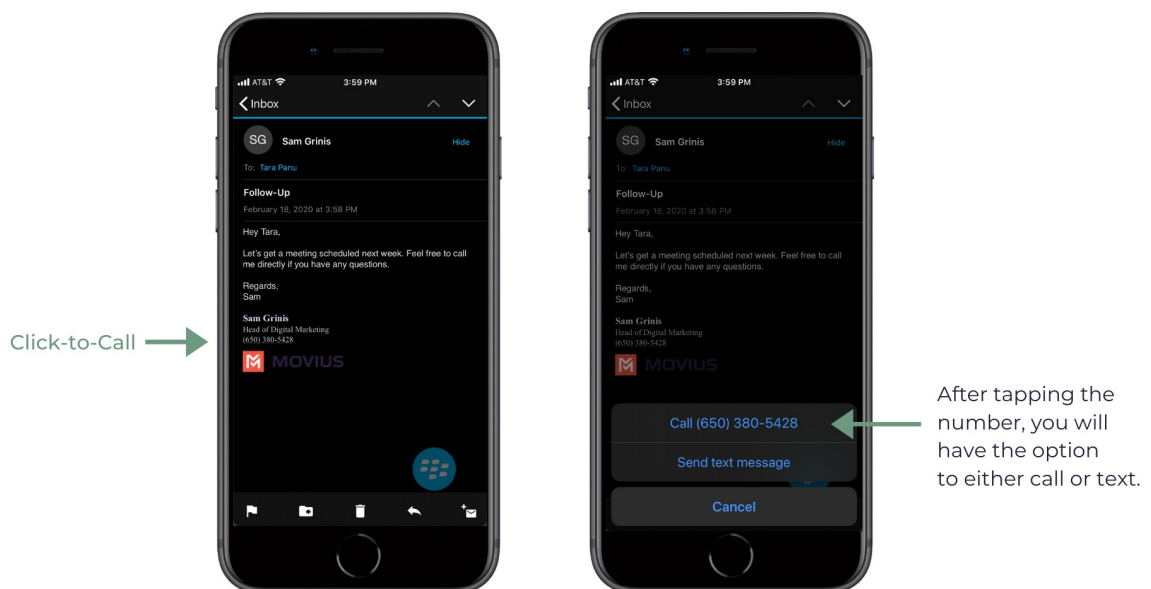


Tapping the message bubble icon beside a contact/number will open the Movius for BlackBerry client to the draft message screen to allow the user to type a message and tap send.

BlackBerry Work Email Integration

When BlackBerry Work recognizes a phone number in an email, it turns the number into a link.

- Tapping on a recognized phone number in a BlackBerry Work email prompts the user to choose to call or text the number.



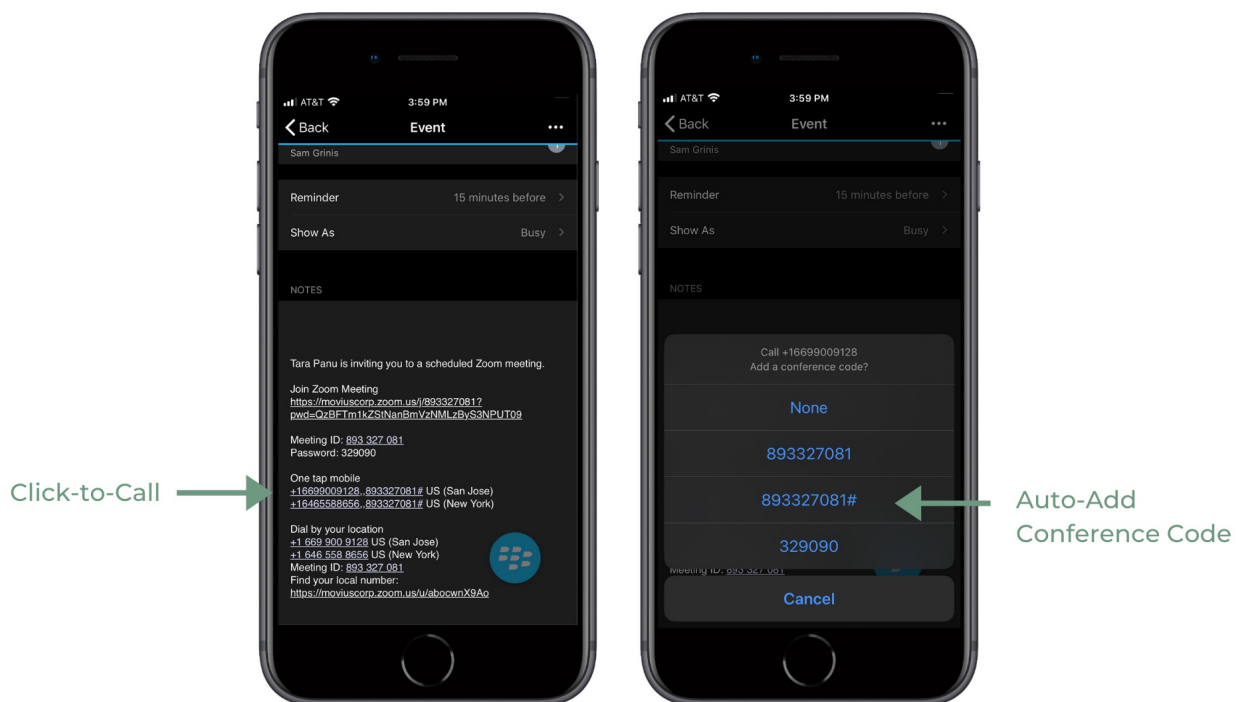
- If you choose call, the client will open and make a call to the number.
- If you choose text, the Movius for BlackBerry client will open to the draft message screen to allow you to type the message and tap **Send**.

BlackBerry Work Calendar integration

Calling a phone number directly from a BlackBerry Work Calendar invitation is supported with Movius for BlackBerry.

When opening a BlackBerry Work Calendar event, if BlackBerry Dynamics recognizes a number within the event details as a phone number, it will be underlined and stylized as blue text.

If the user clicks directly on the phone number, they will be prompted to choose whether they want to make a call or send a text.



- When choosing to make a call, the call is made directly using the Movius for BlackBerry client:
- When choosing to send a text, the user will be taken directly to the draft message screen in the Movius for BlackBerry client.

Minutes Calling

If the Movius for BlackBerry client is configured to make calls using minutes, when choosing Movius for BlackBerry, the UI will display the relationship number in the call box. This is not a mistake! This relationship number is how the Movius application routes your call to the intended number using minutes. Calling this assigned relationship number will allow the call recipient's caller ID to show your MultiLine number, as with a VoIP call.



Using Salesforce Connector

Last Modified on 10/31/2021 9:20 pm EDT

Read this guide to learn how to use MultiLine Salesforce connector.

Overview

MultiLine Salesforce Connector offers seamless merging your MultiLine application into Salesforce CRM. With this integration, you can:

- communicate to your customers within Salesforce.
- make/receive calls and exchange text messages with your customers using your MultiLine number.
- automatically track all communications with your customer thus eliminating the need to manually log calls and texts.

This saves time and reduces human error compared to manual logging. MultiLine Salesforce Connector is the solution to improve the experience of sales teams by helping them sell faster, smarter and in the environment that they are familiar with.

Before you Start

- Your organization must purchase Salesforce Connector for you to have access to this tool.
- Only Chrome browser is supported
- Doesn't support Group Messages
 - Incoming group messages will appear as individual messages.
 - If a group message is sent to two or more contacts from the mobile app, records will be logged for each user separately in MultiLine for Salesforce; one for each contact. Each contact's log will individually show the outgoing message sent by the Salesforce user.
- Doesn't support Picture Messages
 - User will receive an automated message reading "Unsupported multimedia" for all incoming picture messages

MultiLine Salesforce Connector Features

Seamless integration between Salesforce and MultiLine app

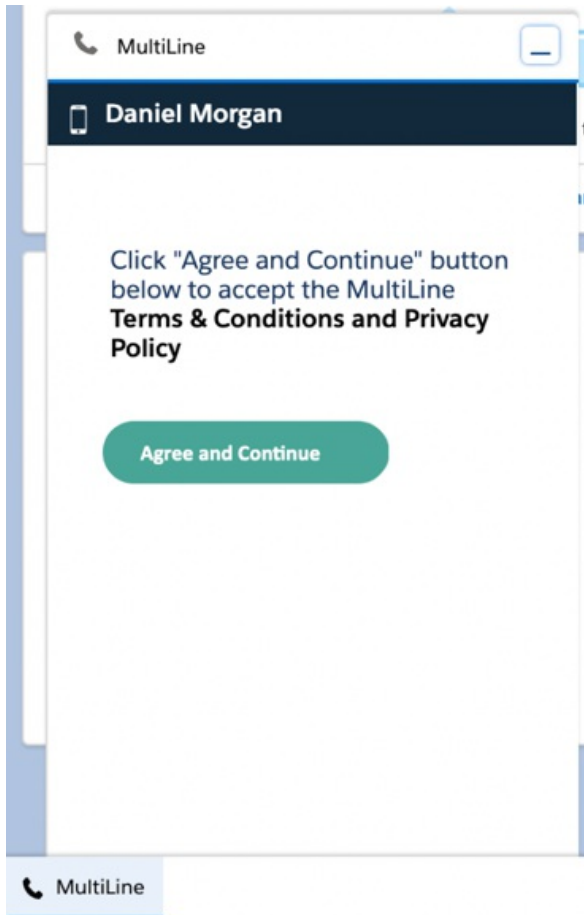
- Inbound/Outbound calling
- Visual Voicemail
- Supports Salesforce Lightning
- MultiLine Utility
- Click to Text
- Click to Call
- Automatic Call Logging
- Alert Notifications
- Notes
- Automatic Reply

- Quick Text Templates
- Reporting

Step 1: Activate MultiLine for Salesforce

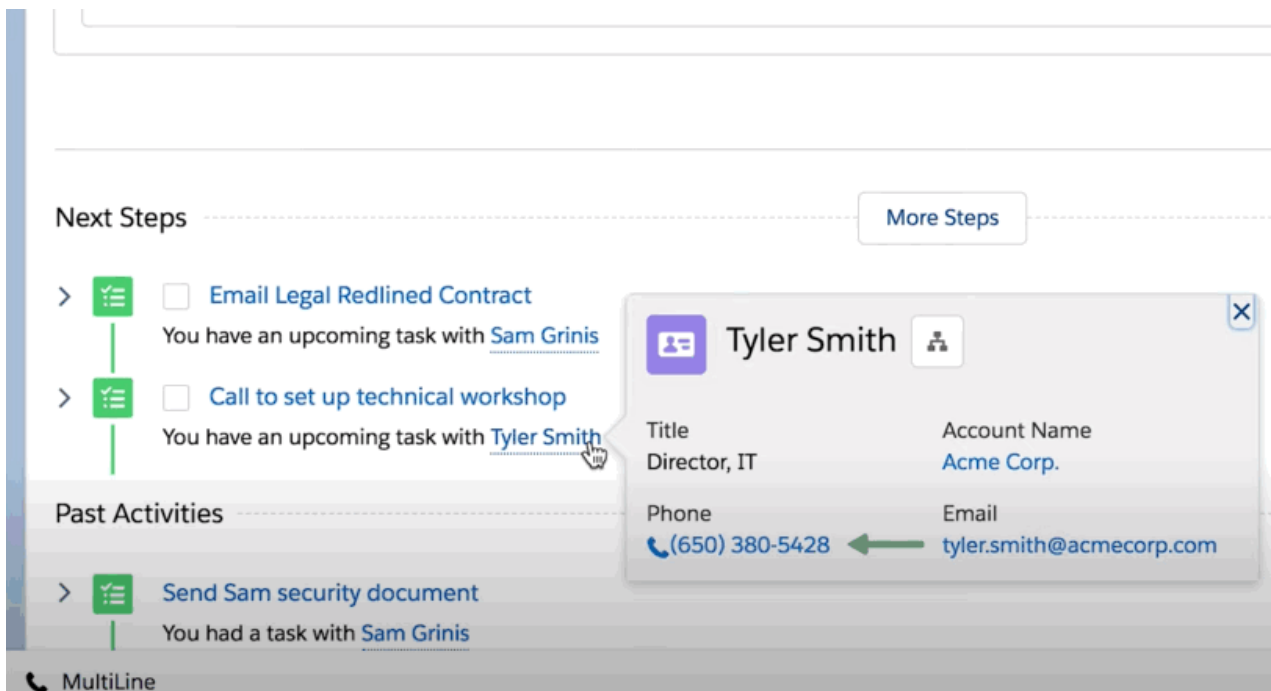
Once your organization sets you up with MultiLine for Salesforce, when you log into Salesforce, you should see the MultiLine utility in the bottom left of your screen.

Agree to the **Terms and Conditions**, and your Salesforce account will be linked to MultiLine.



Step 2: Calls and Messages

With MultiLine for Salesforce all phone numbers in Salesforce are clickable.



- On clicking any phone number field in Salesforce, the MultiLine for Salesforce utility is launched.
- The phone number is automatically populated in the keypad and provides the user a choice to send an SMS or make a call.
- Click on the calling icon to initiate the call.

Softphone Calling Modes

MultiLine for Salesforce supports two calling modes.

1. Softphone Disabled: Allows the Salesforce User to initiate a call from Salesforce directly - but requires the MultiLine app or a deskphone to be configured to continue the call
2. Softphone Enabled: Allows the Salesforce User to make calls directly from the softphone in Salesforce.

This setup is decided by the Salesforce Admin while installing the package. It can be changed by the Salesforce Admin at any time.

Softphone Disabled

Outgoing Calls:

The call first rings on the MultiLine application installed on the user's device - and on the deskphone if the Salesforce User has configured it to do so under Settings. Once the call is answered on either device, it prompts the user to enter any key. Upon entering the key, the call is then connected to the called number. If the call goes to voicemail on the MultiLine number, then the called number is never connected.

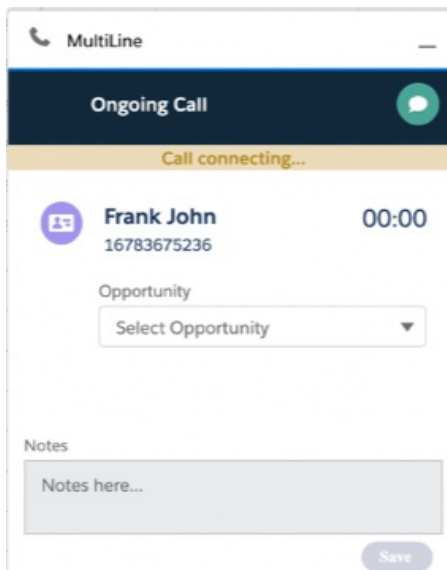
Incoming Calls:

MultiLine for Salesforce opens up automatically to notify the user of the incoming call. Calls ring on both the MultiLine app on the device and on the deskphone if the Salesforce User has configured it to do so under Settings. The user can enter notes on the MultiLine for Salesforce but needs the

MultiLine app on the device or a deskphone for other call controls as mute/keypad/end call.

Answered/Ongoing Calls:

To log notes related to the call, enter the notes in the text area shown below and click **Save**.



Softphone Enabled

Outgoing calls

If a Salesforce Admin enables Softphone, the Salesforce User can make calls from the softphone directly within MultiLine for Salesforce in the Salesforce application.

Incoming calls

On an Incoming call, the calling interface in Multiline for Salesforce opens. You can answer, reject or respond via text from the calling interface.

Click on 'Reject' to reject the call or on 'Answer' to answer the call.

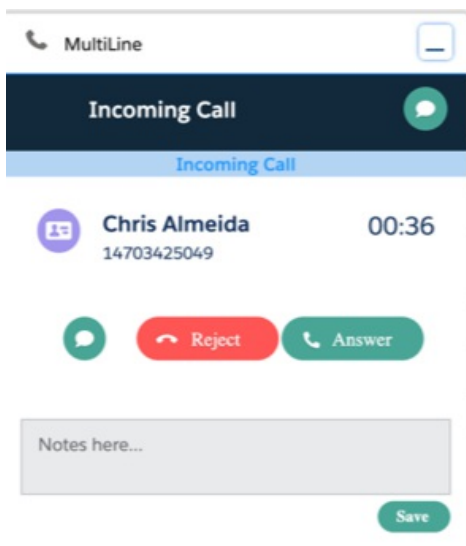
Click on the message icon to disconnect the call and respond with a message.

An incoming call also rings on the MultiLine app. The user has a choice whether to answer the call from MultiLine for Salesforce or from the MultiLine App. Incoming calls will continue to ring on MultiLine for Salesforce even if the device on which the MultiLine app is installed is powered off.

Incoming calls will continue to ring on MultiLine for Salesforce irrespective of the incoming call on data or minute setting of the MultiLine app on the device.

Answered/Ongoing Calls

1. Enter notes within the "notes" blurb and click save to log notes against the call.
2. Click 'Mute' to mute.
3. Click 'Keypad' to add the extension.
4. Even when a call is answered on the MultiLine app the User can add notes into Salesforce.



Syncing between MultiLine and MultiLine for Salesforce

- All calls made from the MultiLine app are synced with MultiLine for Salesforce.
- Incoming calls answered on the MultiLine app appear as “answered” on MultiLine for Salesforce.
- Calls made from MultiLine for Salesforce are NOT synced onto the MultiLine app.
- Incoming calls answered on MultiLine for Salesforce appear as “missed” on the MultiLine app.

Call Logging

All calls made/received on MultiLine for Salesforce are automatically logged as a task under the 'Activity' subsection of the respective contact/lead.

During or after the call, the Salesforce user can enter notes in the notes section located in that subsection. These notes will be saved in the call log. Notes can also be viewed and edited from the 'Tasks' section created for each call under the 'Activity' subsection.

All ongoing calls go through three different stages:

- Call connecting: When the call rings
- Call in progress: When the call is answered
- Call ended: When the call has ended

Recent Calls

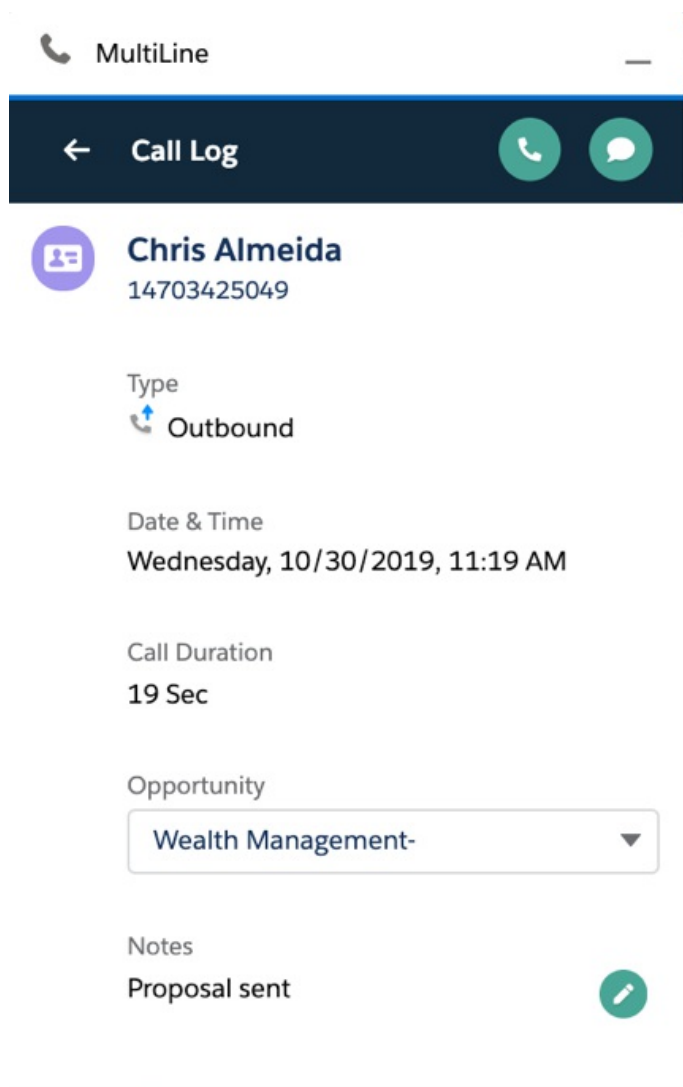
The Call tab in MultiLine for Salesforce lists the calls with a lead, contact or person account. Outgoing calls, incoming calls, and missed calls are differentiated by appropriate indicators.

Each call record shows:

1. The name of the lead, contact or person account,
2. The timestamp of the call (Note: for the current day, only Time is displayed. For the last seven days, the Day and Time is displayed. Prior to last seven days, the Month, Date, Year and Time is displayed)
3. The duration of the call
4. The notes indicator (if notes are logged for the call)
5. Calling ability
6. Messaging ability

To navigate to more extensive details of the lead, contact or person account, click on their name.

Click anywhere else to get call details. Call details shows the notes entered previously. These notes can be modified during the call or any time after the call has ended by clicking .



All calls made from MultiLine for Salesforce can be recorded by purchasing the 'Call Recording' feature from the MultiLine platform. The recordings are available in the MultiLine Admin Portal and/or through the platform's integration with your archival system.


Out of office features

Do not Disturb and **Call Forwarding** settings on the MultiLine application are applicable for incoming calls in the MultiLine Connector as well.

- If **Do not Disturb** is set on the MultiLine app on the device, the call is sent to voicemail.
- If **Call Forwarding** is set on the MultiLine app, the call is forwarded to the number configured in the MultiLine application; whereas the 'Business Hours' configuration in the MultiLine application is ignored in Salesforce.

Handling Unsaved Contacts

You can call to an unsaved number from the keypad. An incoming or outgoing call to an unsaved number will create a record in the Recent calls / Recent messages screen.

On opening the call detail or message conversation screen, click the  icon on the top left to create a new contact or associate an existing contact with this number.

Send or receive an SMS

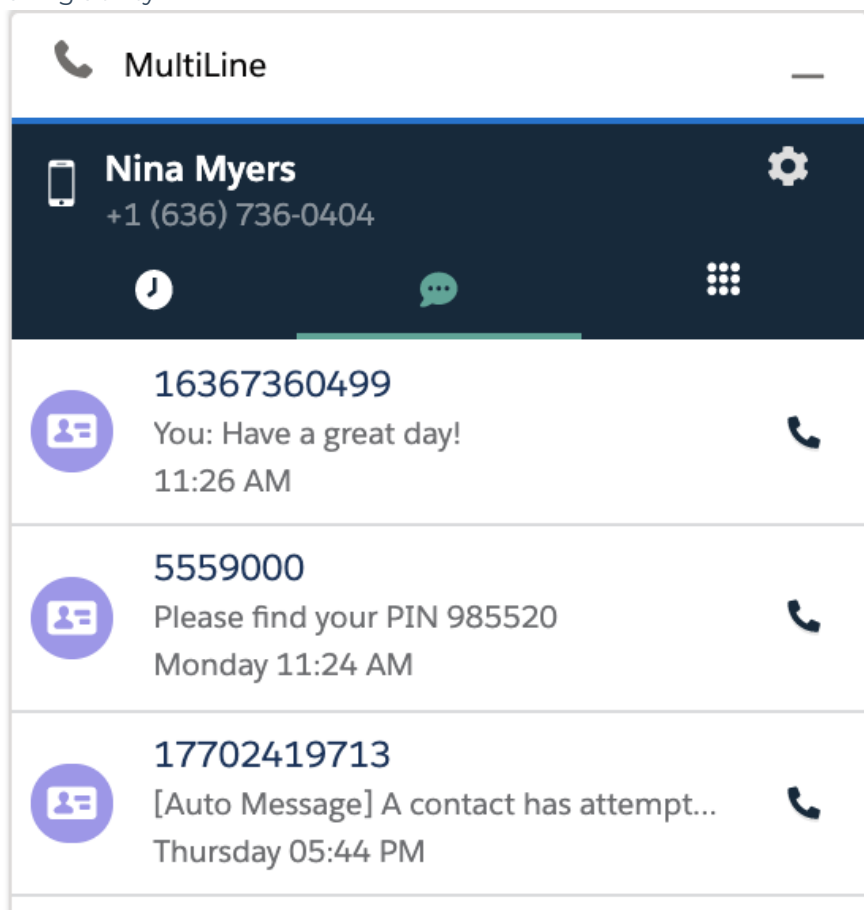
- Clicking any phone number field in Salesforce will launch MultiLine for Salesforce
- The phone number will auto-populate in the keypad
- Clicking on the message icon opens the message conversation thread with that number

Recent messages

Recent Messages shows the list of all the lead, contact or person accounts that the Salesforce User has message conversations with.

Each record shows:

- The name of the lead, contact or person account
- The timestamp of the message (Note: for the current day, only Time is displayed. For the last seven days, the Day and Time is displayed. Prior to last seven days, the Month, Date, Year and Time is displayed)
- A snippet of the last message
- Calling ability



- To navigate to the details of the lead or contact or the person account

1. Click on their name.
2. Click anywhere else to open the message conversation thread.
3. Type the message in the text area or use a Quick Text template.
4. Click on the send button.
5. All messages shared from MultiLine for Salesforce are synced in the MultiLine app on the device, and all messages shared from the MultiLine app are synced in MultiLine for Salesforce.

All messages sent from MultiLine for Salesforce can be recorded by enabling the 'Message Recording' feature for the organization (to be done by Salesforce Admin). The recordings are available in the MultiLine Admin Portal and/or through the platform's integration with the customer's archival system.

Use Salesforce's out-of-the-box functionality for Quick Text to save time by creating common responses ahead of time that you can retrieve easily from the message conversation screen.

Enable Quick Text

1. Open the **Setup** tab
2. Click **Enable Quick Text**

Create a Quick Text

1. Open the **Setup** tab
2. Enter **Quick Text Settings** in the **Quick Find** box
3. Select **Quick Text Settings**
4. Select **Enable Quick Text**
5. Click the **App Launcher**
6. Under **All Items**, select **Quick Text**
 - In standard navigation apps, click the **Quick Text** tab
 - In console navigation apps, select **Quick Text** from the item picker
7. Click **New**
8. If you have more than one quick text record type, select a record type for the new message
9. Click **Continue**
10. Enter a message name
 - Use a name that helps users identify when to use this message
11. Enter the message
 - The message can include line breaks, lists, special characters, merge fields, and up to 4,000 characters
12. Select the channels in which you want the message to be available
 - Depending on which features are enabled in your org, the following channels might be available

◦ Channel types

Email—for Email actions

Event—for Event actions

Internal—works with internal fields, such as the Change Status action Knowledge—for Knowledge articles in Lightning Experience

Live Agent—for Live Agent chat in the Service Console

Phone—for the Log a Call action

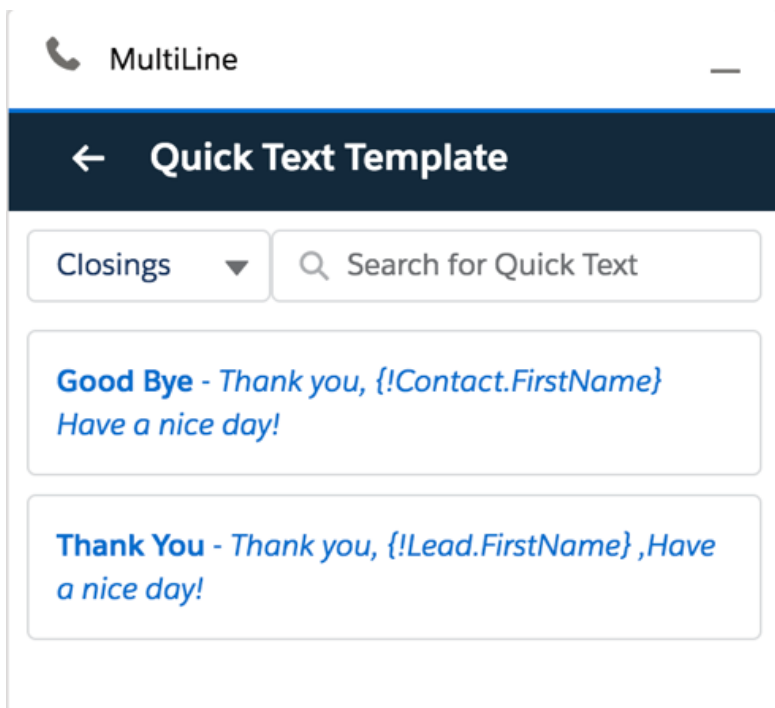
Portal—works in a community or a customer portal


Social—for social posts

Task—for Task actions

13. Select a **Category**
 - In organizations created before Spring '18 that have quick text enabled in Salesforce Classic, this field is required, and a default Category is provided for you. In organizations created after Spring '18, this field isn't required
14. Select a folder
 - Folders help you organize and share quick text. You can create up to four levels of folders: one root folder and up to three subfolders
 - This field is visible only when Share and organize quick text in folders is enabled
 - In some organizations, the Folder field must be added to the page layout
15. If you use merge fields, click **Preview** to review the message with data from the records that you choose
16. Click **Save**

Add a Quick Text



1. When composing a message, click the **Quick Text** icon  to bring up the list of available Quick Text templates
2. Select the template.

The content of the selected template will populate the message text area

Refer to [Salesforce Help](#) for more information on creating Quick Text messages and sharing them.

If you make or receive a call from an unsaved number, this automatically creates a contact under the default account **MultiLine Internal**. This account is set by the Salesforce Admin while installing the MultiLine for Salesforce.

For these contacts:

- The first name and last name fields are saved as the phone number.
- The email address is saved as [phone number]@domain.com.
- The mobile field is saved as the phone number.

The contact can be later modified if the user has privileges to edit contacts.

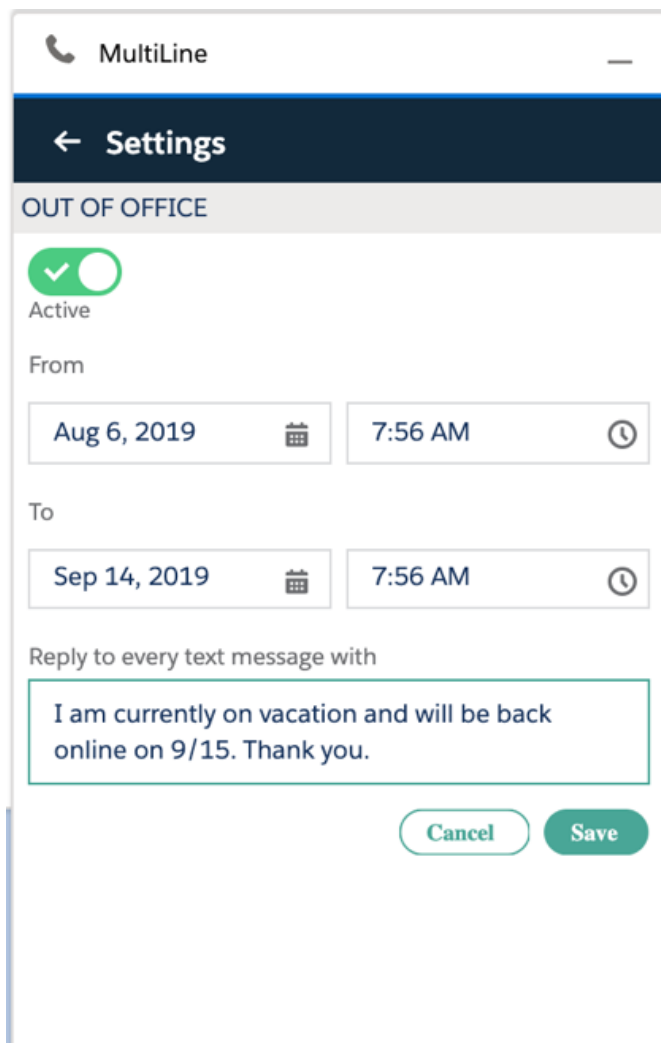
The Salesforce administrator can further build workflows or visual flows to assign these contacts to separate groups/teams, auto-delete, or take advanced actions such as alert users/groups based on keywords in the text message.

Step 3: Settings

Set an Out of Office auto-reply by going to **MultiLine for Salesforce > Settings > Out of Office**.

1. Enter **From** and **To** dates to set the time range
2. Complete the out of office auto-response
3. Set the **Active** toggle to on and click **Save**

All incoming SMS during the set 'out of office' date range will receive the auto-response defined in this configuration



The screenshot shows the 'MultiLine' app interface for configuring 'Out of Office' settings. At the top, there is a 'Settings' header with a back arrow. Below it, the 'OUT OF OFFICE' section is highlighted. A green toggle switch is turned on, labeled 'Active'. Underneath, the 'From' field is set to 'Aug 6, 2019' and '7:56 AM', and the 'To' field is set to 'Sep 14, 2019' and '7:56 AM'. A text box contains the auto-reply message: 'I am currently on vacation and will be back online on 9/15. Thank you.' At the bottom, there are 'Cancel' and 'Save' buttons.

Do Not Disturb and **Call Forwarding** settings on the MultiLine application are applicable for incoming calls in the MultiLine Connector as well.

- If **Do Not Disturb** is set on the MultiLine app on the device, the call is sent to voicemail.
- If **Call Forwarding** is set on the MultiLine app, the call is forwarded to the number configured in the MultiLine application; whereas the 'Business Hours' configuration in the MultiLine application is ignored in Salesforce.

You're ready to use Salesforce Connector

You've learned how to navigate the Salesforce Connector and use it to manage calls and messages within Salesforce. To learn more about using the mobile app, explore the Using MultiLine category.

What is WhatsApp Messaging Connector?

Last Modified on 10/31/2021 9:20 pm EDT

Read on to learn about WhatsApp Messaging Connector

Overview

The WhatsApp Messaging Connector allows compliant WhatsApp messaging directly inside MultiLine.

- MultiLine users can send WhatsApp messages to contacts, and they can read and reply to WhatsApp messages on the MultiLine messages screen alongside SMS and Voicemail messages.
- WhatsApp users receive messages from the MultiLine user as coming from an official WhatsApp business account.

Benefits

- Engage with clients on their preferred consumer messaging channel
- Help unify and bring together mobile voice and multiple messaging channels in a single, convenient user experience
- Ability to record and archive all conversations over voice, SMS, and WhatsApp within MultiLine for surveillance and compliance
- All conversations are captured and can be automatically be sent to existing compliance archive and logged inside CRM

Features

- Call, SMS and WhatsApp – all within MultiLine app
- Shared messages inbox containing SMS and WhatsApp messages threads
- Supports one-to-one messaging between MultiLine App and external WhatsApp users
- Enforce mandatory opt-in from WhatsApp user
- MultiLine app detects if WhatsApp is not enabled for the receiving user and offers an option to send SMS
- Supports data loss prevention feature with ability to redact or block WhatsApp messages as per business defined policy
- Optional recording of all WhatsApp messages (with recording add-on)
- Support for iOS and Android

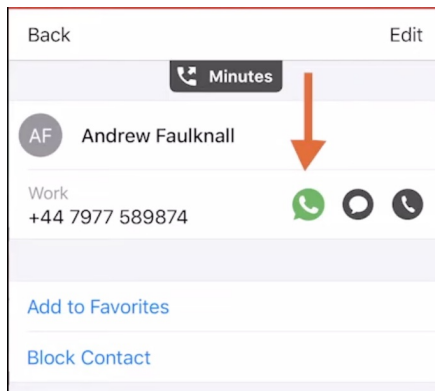
Before you start

- Your organization has to enable WhatsApp Messaging Connector for it to be available in MultiLine. If not, you won't see the green WhatsApp messaging icon.

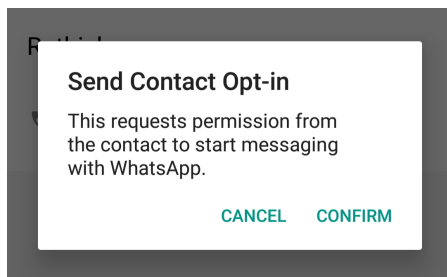
How it works

Step 1: MultiLine user sends the first message to WhatsApp user from MultiLine.

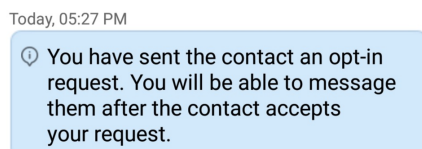
User clicks WhatsApp message icon:



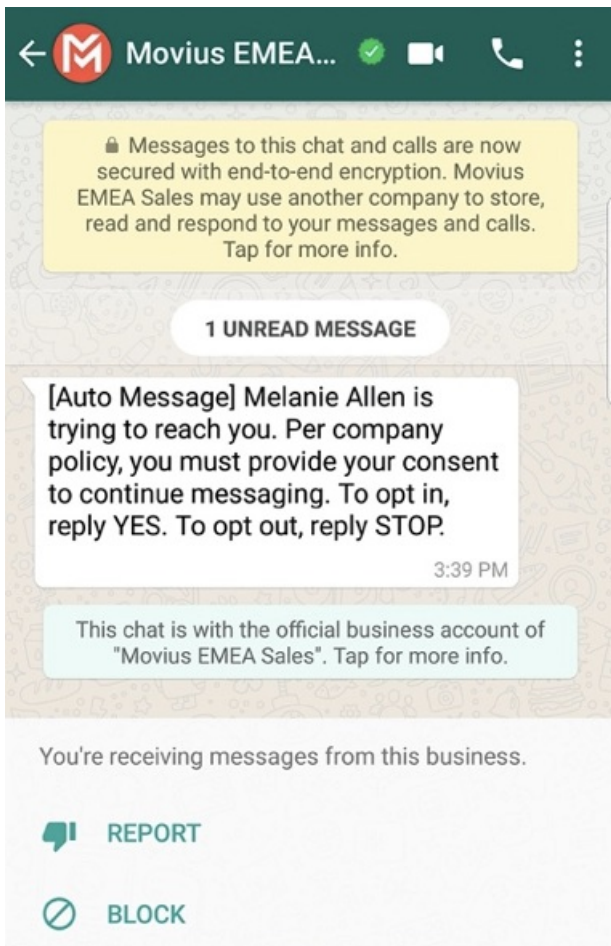
MultiLine asks if the user would like to send the opt-in message:



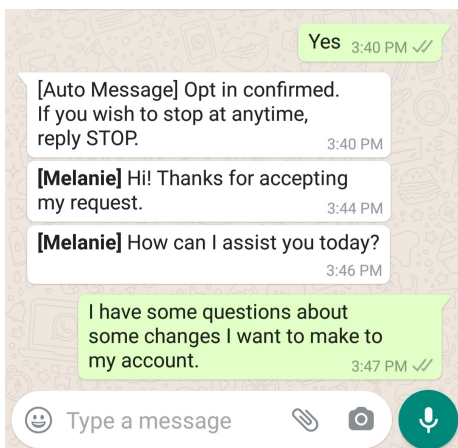
MultiLine sends the opt-in message:



Step 2: WhatsApp user receives a mandatory opt-in message that lets them know the MultiLine user wants to chat.



Step 3: If accepted, a 24 hour conversation session begins. The users can freely message each other.



Step 4: Starting a new conversation session

WhatsApp users may always start new conversation sessions by sending a message. To prevent spam, after a 24 hour lapse of conversation, as a WhatsApp business account user, the MultiLine user must re-initiate conversations using pre-approved template messages. These messages are evaluated ahead of time to make sure they abide by WhatsApp Business policies.

Today, 10:13 AM

🔔 The contact hasn't responded for more than 24 hours. Please use the template button in the bottom-left to select a message to send.

✕ Send message ▶

I'm sorry that I wasn't able to respond to your concerns yesterday but I'm happy to assist you now. If you'd like to continue this discussion, please

I've emailed you the documents to complete. Please fill them out and send back to us as soon as you can. Let me know if you see it, or need me to re-

Just wanted to let you know to check your email for some important documents. Please fill them out and send back to us as soon as

Comparison to other available options

- *Background Recording Agents* snoop on all data and network traffic on the user phone. Our WhatsApp Connector respects the user phone privacy and never accesses private use of the phone.
 - *Modified WhatsApp apps* are unapproved clones that add the recording feature. Our WhatsApp connector is approved, and abides by all WhatsApp policies.
-

Movius PBX Integration

Last Modified on 10/29/2021 5:56 pm EDT

Movius PBX Integration allows you to use the same number when using your PBX desk phone and MultiLine applications.

- You can place and answer calls from your PBX desk phone or mobile phone
 - Simultaneous ringing presents calls to both devices at once
 - The called party sees the same calling number no matter which device is used.
 - For regulated users, all Movius call recording options are available for calls from PBX phone or mobile phone
 - You can send and receive recorded SMS messages with MultiLine apps
-

Using MultiLine Desktop

Last Modified on 10/31/2021 9:35 pm EDT

Read on to learn about using MultiLine Desktop.

Overview

MultiLine Desktop brings the mobile business calling and messaging features critical to your frontline client communications to the browser.

For regulated users, these calls and messages will be captured for compliance teams in the Management Portal just as they are in the mobile apps. You can sync with your Office 365 Exchange Contacts, or build a local contact list. 1:1 messaging and calling is supported. Manage Availability and Call Handling settings can only be set in the mobile app, but will apply for the desktop.

Before you start

You can use the MultiLine Desktop application with the following browsers:

- Chrome 90.0.4430 or above
- Safari 14 or above
- MS Edge 90.0.818.39 or above

Activation and first log in

Accept your invitation

To prevent unauthorized users, both mobile and desktop MultiLine applications don't allow self-registration and are invitation-only.

For current users of the mobile app, expect an email from your organization providing you the link to your organization's MultiLine Desktop web site. Use the username and password from your most recent invitation to the mobile app. If you can't find it, you can reset your password using Forgot Password.

For new users to mobile and desktop, The link to MultiLine Desktop and credentials for activating your mobile app and your first log in to the web portal are included in the MultiLine invitation.

- Your username will be an email address.
- The password in your invitation is a one-time use password that will only be used for your first log-in. After you sign in, you will be asked to set a new password.
- If you lose your invitation, contact your IT team to have a new one sent.
- If you receive multiple invitations for any reason, use the details in the most recent invitation.
- Continue to use the password from your most recent invitation whenever you need to activate or reactivate your mobile application, not the new password you set for Desktop.

Hi Brittany Hoffman,

Welcome to MultiLine!

- On your iPhone or Android, tap the button below

Download and Activate

- On your computer, use your phone's camera or QR reading app to scan the QR code below



- To manually activate, click [this](#) link to download the app and enter the credentials below during onboarding

Company ID : MYCT.GHT200

User Name : john.s@gmail.com

Password : GhBf56Xfgt

- To access MultiLine WebClient click [this](#) link and enter the credentials below during onboarding

User Name : Brittany.Hoffman@MoviusCorp.com

Password : GhBf56Xfgt

First Log In

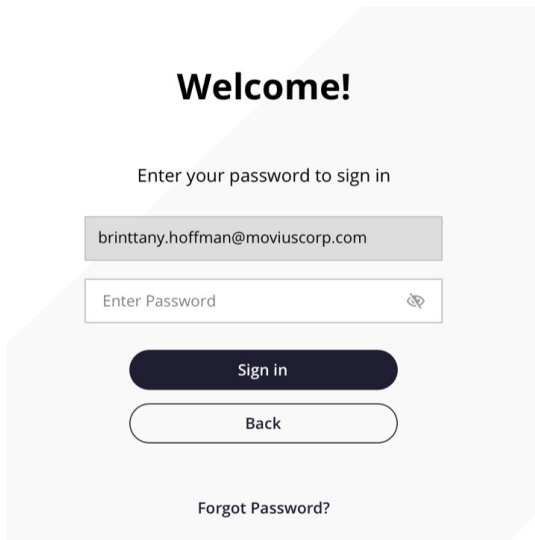
1. Enter the email ID from your invitation on the log in screen.
 - If you're set up with two factor authentication, SSO, or other security measures, these will activate automatically once you've entered your email ID.

Welcome!

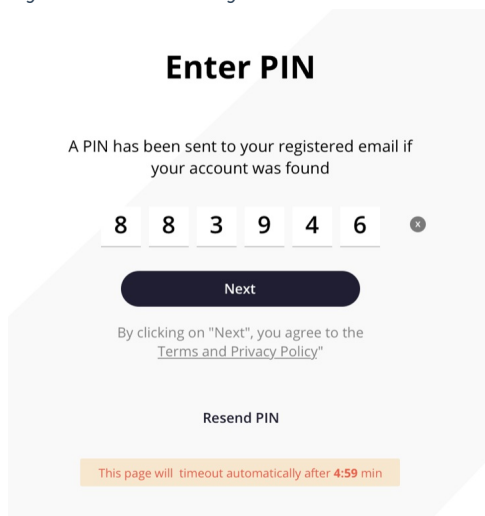
Enter your username to sign in

Continue

2. Enter your password from the invitation, then check your registered email for a PIN. *Note: If you can't find your invitation, click [Forgot Password](#) to set a new one. After completing the Password Reset steps, you'll skip to step 5, syncing your Exchange Contacts.*



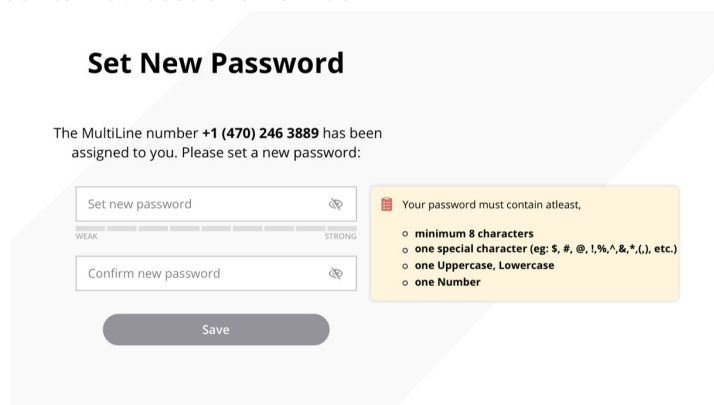
3. Enter the PIN you received at your email on the screen. *Note: You must type it in rather than*



copy-paste.

4. You'll be prompted to set a new password.


- Password Requirements:
 - minimum of 8 characters
 - contain at least one special character, at least one uppercase and one lowercase character
 - contain at least one number



5. If you're a user in the USA, and haven't entered your E911 information into the mobile app, you'll see the E911 screen. Use the address where you'll be using MultiLine Desktop, this address will be used by emergency dispatchers if you contact 911.

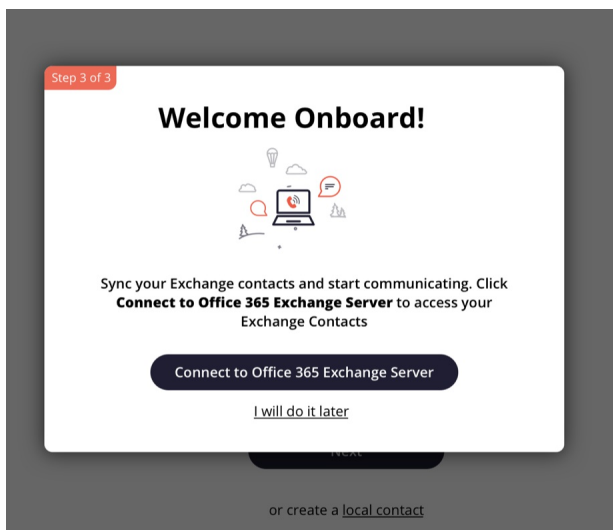
Example below for emergency address "11370 Lakefield Drive Johns Creek Duluth, GA 30067":

First Name	Last Name
Unit/Apt Number/Street#	
Address Line 1	
Address Line 1	
City	Postal / Zip code
State	
By clicking on "Continue", you agree to the E911 Terms & Conditions	



John	Green
11370	
LAKEFIELD DR	
JOHNS CREEK	
DULUTH	30067
GA	
By clicking on "Continue", you agree to the E911 Terms & Conditions	

6. You'll be prompted to sync your contacts. We can identify your Office 365 Exchange account using the email you signed in with, so it will only take a few seconds.



That's it! Your MultiLine number will display and the activation process for the web application is complete.

You'll remain logged to MultiLine Desktop as long as you have the site open in the browser even if you are using other tabs or browser windows. We will display a notification and play a sound for incoming calls.

Calling

Making a call

There are multiple ways to make calls in MultiLine Desktop.

Note

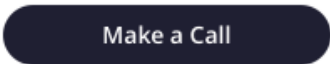
- You must grant MultiLine Desktop permission to use your microphone and speakers to make calls.
- Your organization must allow calling for you to make calls from MultiLine Desktop.

Calls Screen

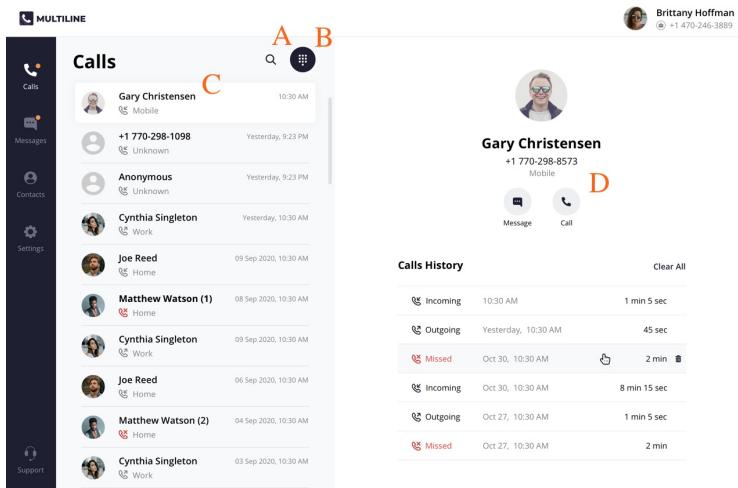
The first time you go to the Calls screen, click the **Make a Call** button to place your first call.



Your contacts are waiting to hear from you! Click **Make a Call** to begin dialing a number.



After you place your first call, your list of recent calls will appear on the **Call logs** screen.



1. Use the **Search** icon to search your recent Calls.
2. Use the **Dialer** icon to bring up the Dialer screen.
3. Clicking a **Call log** will display the call history and contact information, if available. For a saved Contact clicking on the **Contact name** or **Contact picture** will take you to the specific **Contact detail** page.
4. You can easily call or message a contact again from this screen by clicking the **Call** and **Message** icons.

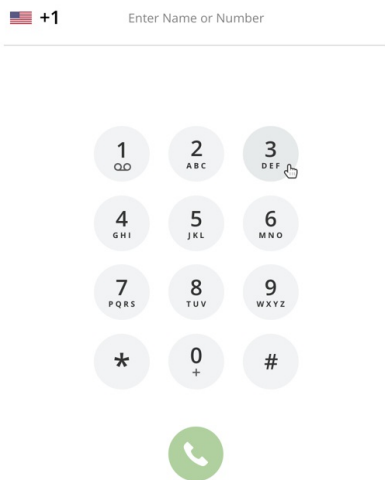
Dialer Screen

From the dialer, you can manually dial a number or enter the first or last name of a contact to pull up their number.

- You can click the numbers or use your keyboard.
- When dialing numbers, please make sure to include the international country code even when placing domestic calls.

Note:

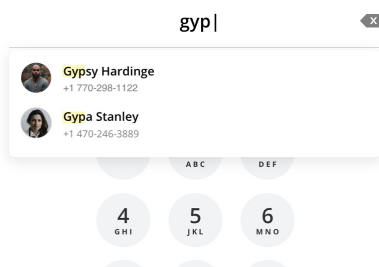
- Dynamic search will only display saved contacts, it doesn't search the GAL. See Search and Store Contacts from GAL.
- You must type at least three numbers or three letters of a contact's first or last name to activate the dynamic search.



Entering a number:



Entering a name:



Complete dialing the number, or select the contact, then click the Start Call  button.

In-Call Screen

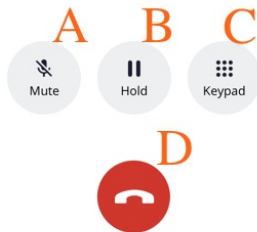
The In-Call screen will appear when someone you call answers the call, or you answer a call from someone else.



Gary Christensen

+1 770-298-8573

00:01:07



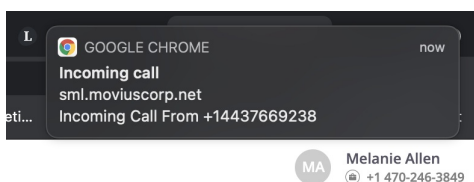
1. Use **Mute** to cut off your microphone. You can hear the other caller, but they can't hear you. Press it again to turn your microphone back on.
2. Use **Hold** to suspend the call. The call will not be disconnected, but neither party will be able to hear the other party during the hold. Press it again to end the hold.
3. Open the **Keypad** to dial numbers.
4. Use the **End Call** button to end the call.

Accept or reject incoming calls

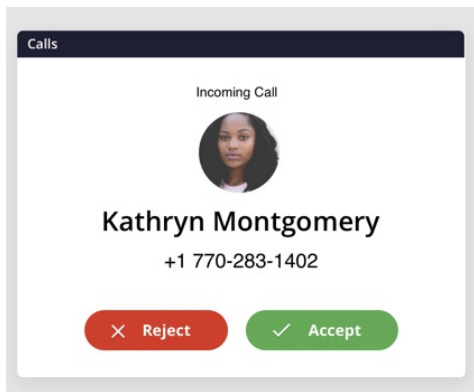
Your incoming call screen and notifications may appear differently depending on what you're doing.

Incoming Call Notifications and Screens

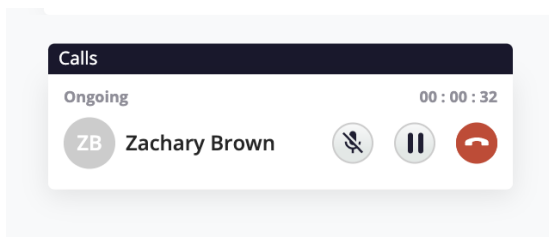
Whether you're on the MultiLine Desktop tab or window, the ringtone will play and a visual notification will display when you receive an incoming call.



If the caller is in your contacts, you'll see their contact information on the incoming call screen and options to **Reject** and **Accept**. Clicking **Reject** will send the user to your voicemail, and **Accept** will answer the call.

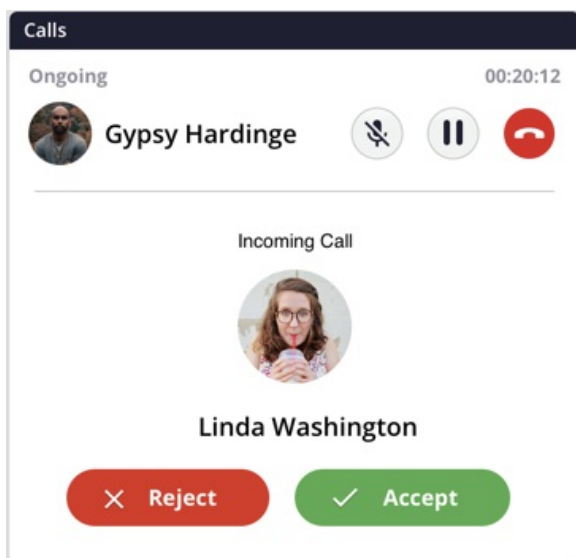


As you move through screens on MultiLine Desktop when you're on a call, the call window will follow. You can move it by clicking and dragging.



If you receive another incoming call, your option to accept or reject the incoming call will appear below your ongoing call. If you accept a call while on a call, this will automatically put the person you're currently talking to on hold.

A window will appear with the two calls. From this screen you can **swap calls**, and perform other actions.



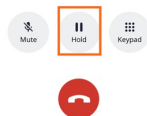
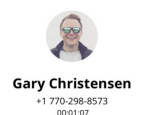
Many web users were bothered by nuisance audio coming from web sites that automatically play when a page is loaded, such as that from videos and advertisements. To address this, Chrome and Safari browsers added a feature that blocks audio by default from web pages if the page or tab is refreshed, but not clicked on by the user.

Therefore, if you haven't accessed the MultiLine Desktop tab since the last time it refreshed (for

example, if you closed and restarted chrome and loaded your tabs from the previous session) the ringing sound will be blocked. However, you'll still be able to see the visual notification of the incoming call.

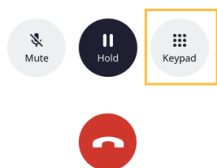
To unblock the ringtone from being played, open the tab where MultiLine Desktop has recently refreshed and click anywhere within the MultiLine Desktop application and this should ensure that the ring sound will play.

Place a call on hold



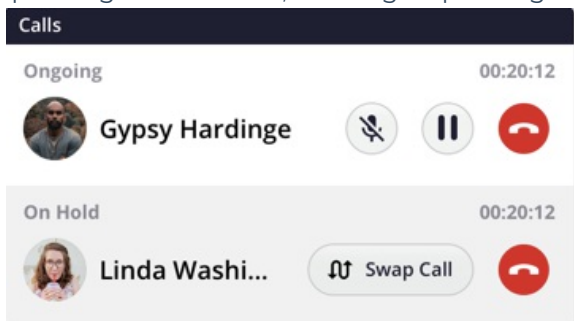
Click the **Hold** button to put the call on hold.

After putting the call on hold, you can dial a number by clicking the Keypad.



When you have two ongoing calls, your ongoing call window will display the information of the two parties. You can only speak to one party at a time the other will be placed on hold.

You will see the **Mute** icon, **Hold** icon, and **End Call** icon for the party you are speaking with. You will see the **Swap Call** icon for the party on hold. Click the **Swap Call** icon to put the party you're speaking with on hold, and begin speaking to the other party.



Use the Manage Availability and Call Handling in the mobile app MultiLine Settings menu to set in MultiLine Desktop.

- **Call Handling**
 - Set Simultaneous and Sequential Dialing
 - Set Call Forwarding

- Set Business Hours
- Set Do Not Disturb

Messaging

MultiLine Desktop currently only supports 1:1 SMS messaging. Group Messaging, Picture Messaging, and WhatsApp messaging coming soon!


When it's your first time on the Messages screen, click **Start a Chat** to send your first message.





Ready to message your contacts? Click **Start a chat** to begin a conversation.

Start a Chat

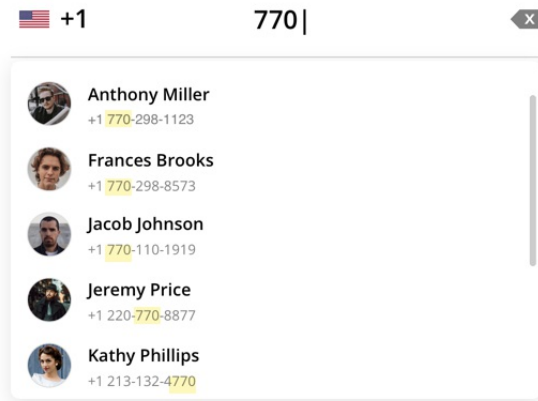
At the new message window, begin typing the first or last name of someone in your saved contacts, or a mobile number.

 +1

After you've entered at least 4 digits (including country code) or letters, you'll see a list of auto-

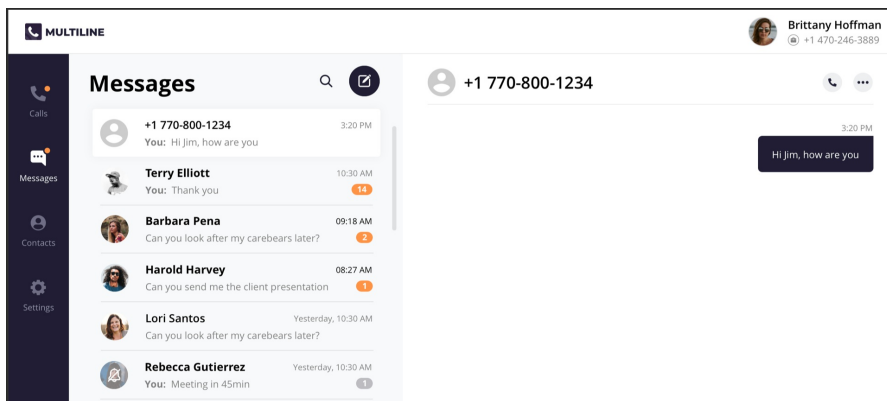
suggestions. *Note: only saved contacts will appear in the auto-suggestions.*



When you have completed entering the number, or selected from the results, you can type your message in the **Type your message...** field.

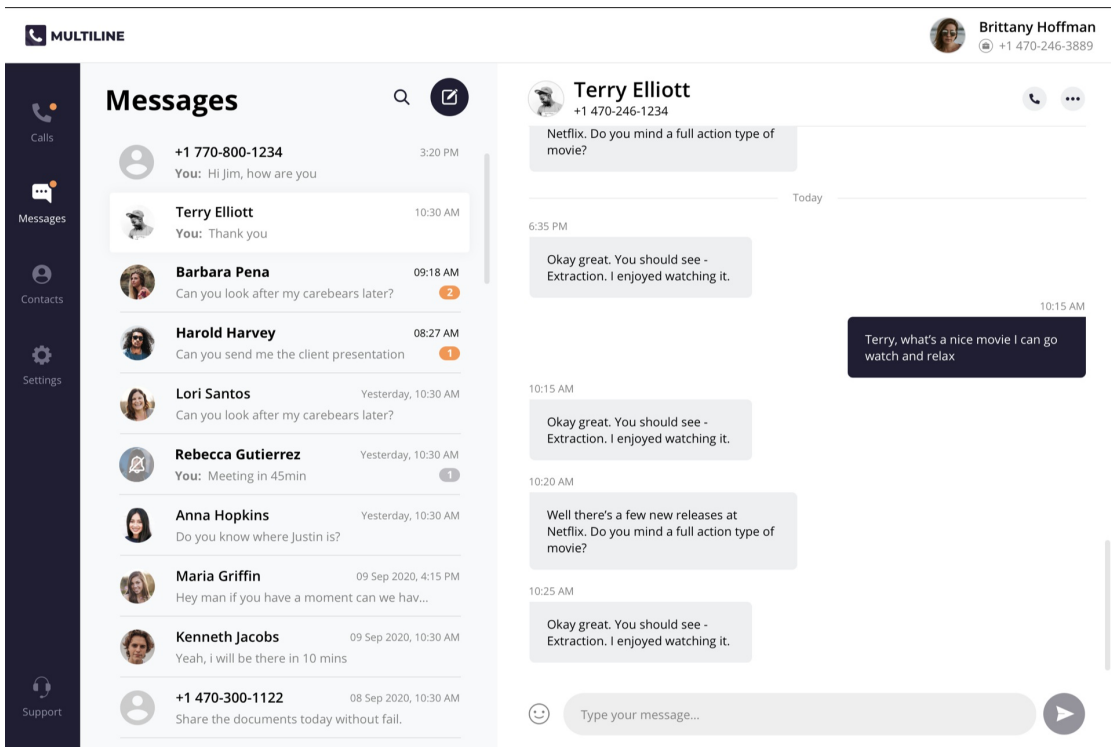



Press the enter or return key, or click the **Send Message** icon to send the message.

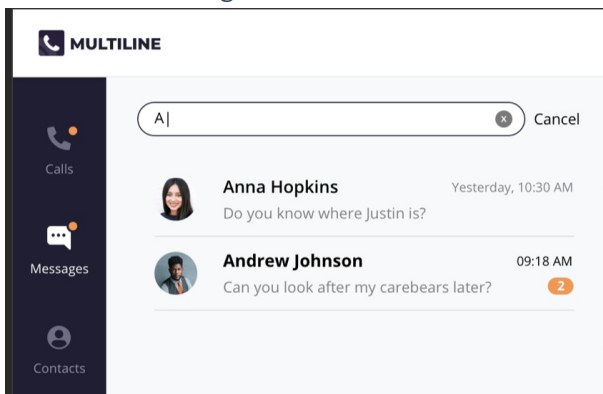


Once you've sent at least one message, your list of Messages will appear on the screen.

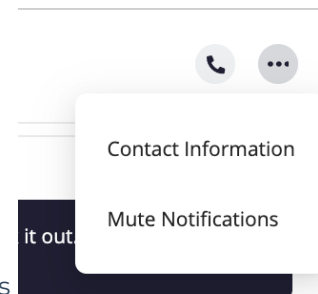
1. Click any **Message** to see your Message history.



2. Click the Search icon  to search your messages by name or number. *Note: search does not search message content.*



3. Click the New Message icon  to start a new message.



4. Click the menu icon to see Contact Information or Mute Notifications
1. Select Contact Information to see the Contact Information screen. If the user is in your contacts, you'll see the information stored. If not, you'll be able to add the user to your contacts from this screen.
 1. User is in contacts:



Terry Elliott

terry.elliott@miviuscorp.com



Message



Call

Details

Home	+1 770-298-8573
Company	Microsoft
Job title	Manager
Business Address	11360 Lakefield Dr Duluth, GA 30097 United States

2. User is not in contacts:



14705182526

Unknown



Message



Call



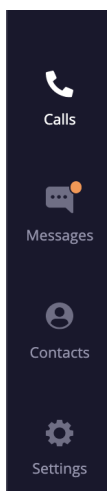
Create Contact



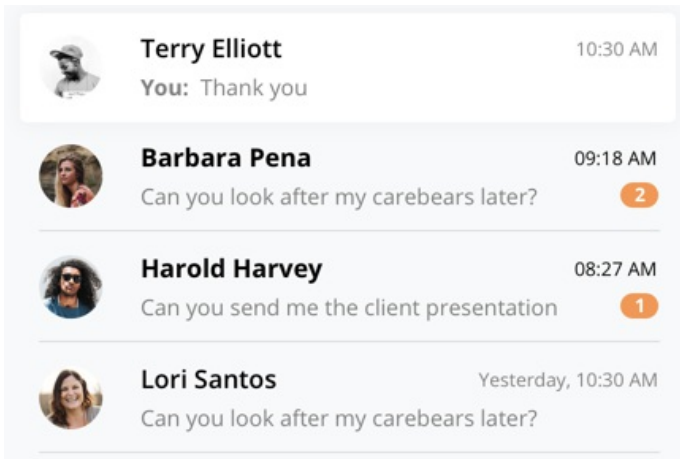
Add to Existing

2. Select Mute Notifications to stop sound and visual notifications when the contact messages you. You will see the messages sent to you when visiting the message thread.

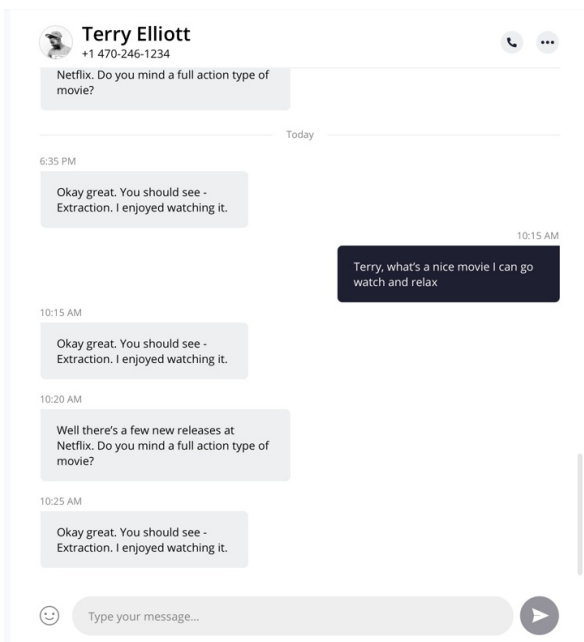
When you have new messages there will be an orange badge notification on the Messages tab.



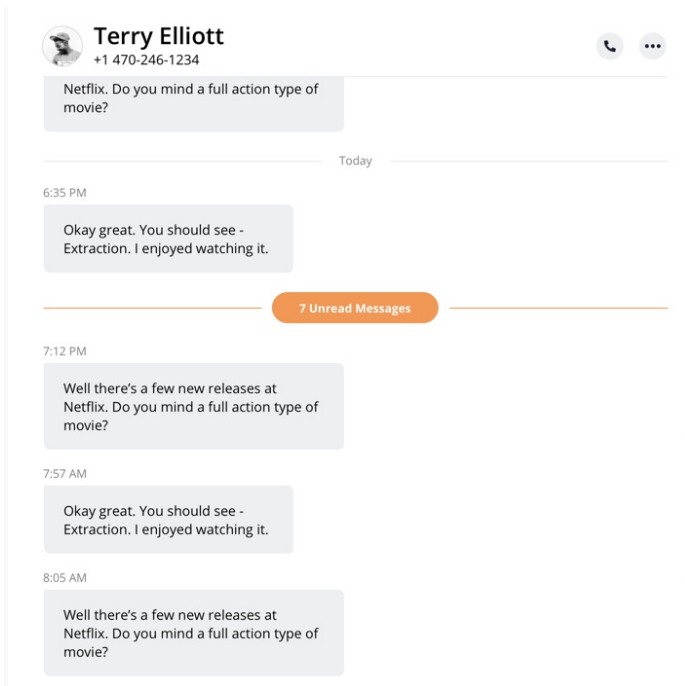
Threads with new messages will have an orange badge notification. The number represents how many unread messages are in the conversation thread.



We provide helpful reminders to help you know what to pay attention to. For example, we might show you that a set of messages is from today.



Or if you've had many new messages, we will show you where your unread messages begin.



Contacts

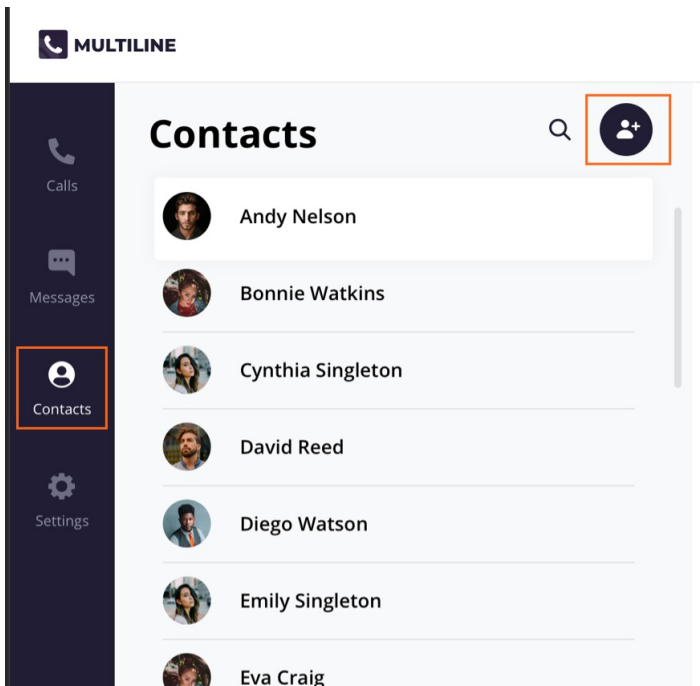
You can add, edit, update and delete contacts from the **Contacts** screen. You can also add and update unknown numbers from the **Calls** and **Messages** screens.

Note: When using Exchange Contacts, you can also add contacts to your list by adding them directly to the Office 365 Exchange Server. It will reflect in your contacts list at the next sync period.

Add a new Contact


You can add, edit, and delete contacts from the **Contacts** screen.

1. Go to **Contacts** and click the **Create Contact** icon.



2. The Create Contact screen will appear. Fill out the details then click **Create**. *Note: The only required fields are First Name and Last Name and at least one phone number. You can add all fields that are available in Office 365 Exchange Contacts.*


Create Contact



First name * **A**

Last name *

Contact information



+1

B

Email **C**

Work

Company **D**

Notes

Add notes **E**

+ Add More **F**

Cancel

Create

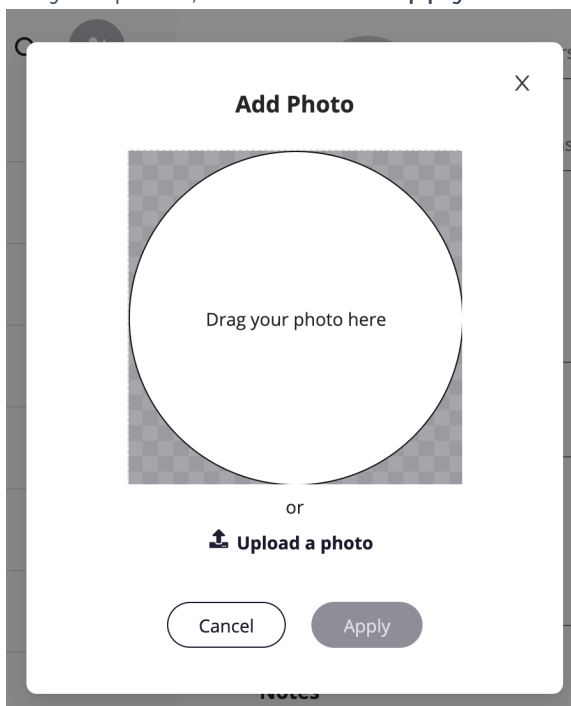
1. First Name and Last Name
2. Contact Information
 - Business Phone is the default label
 - Make sure to include country code when entering phone numbers

3. Email Address
4. Work (Company Name)
5. Notes
6. Add More menu
 1. Click Add More menu to add more fields

Expanded Contacts screen



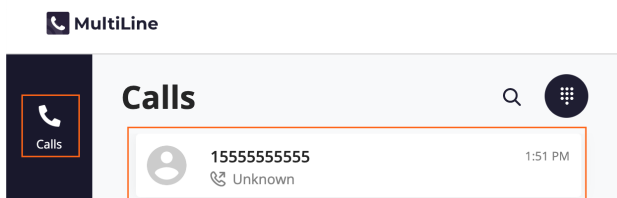
3. Add a picture for the contact by clicking the camera icon.
 - Add your photo, and then click **Apply**.



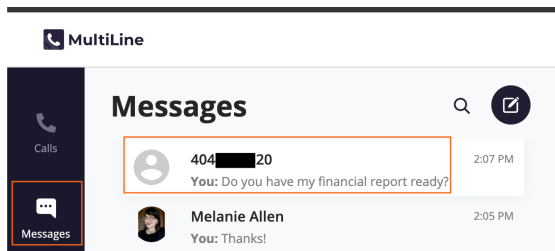
4. When completed, click **Create**.

Add an unknown number to Contacts

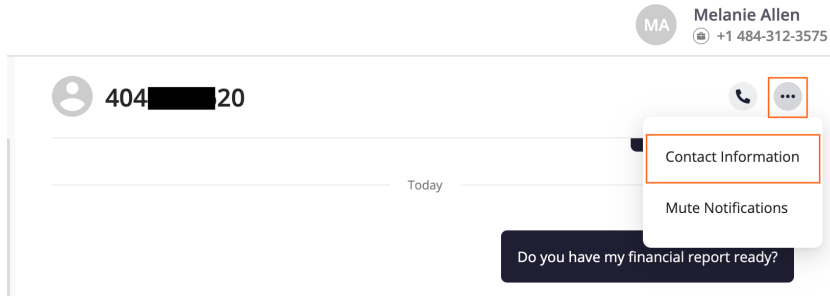
1. You can add an unknown number from **Calls** or **Messages**:
 1. For calls: Go to **Calls** and click the **Call log**.



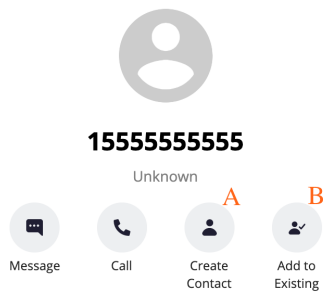
2. For messages:
 1. Go to **Calls** and click the **Message Log**.



2. Click the Messages Menu and select Contact Information.



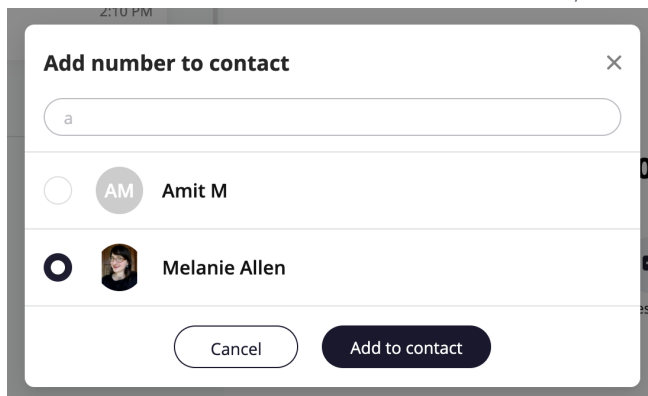
2. You have two options to add the caller to your Contacts list:



Calls History

Outgoing	1:51 PM	1 sec
----------	---------	-------

1. To make a new contact from the Unknown number, click **Create Contact**.
 - This will pull up the **Add a Contact** screen, where you can fill out the details as desired.
2. To add the Unknown number to an existing contact, click **Add to Existing**.
 1. Narrow down the list of contacts by typing in at least one letter of the existing contact's first or last name into the search field.
 2. Click the radio button for the desired contact, then click **Add to Contact**.



3. This will pull up the **Update Contact** screen and automatically add the new number.

1. Click **Update** to add the new number.
2. If you need to delete the old number, hover over the number to reveal the

trashcan icon, click it to remove the number, then click **Update**.

Contact information

Home Phone
+15555555555



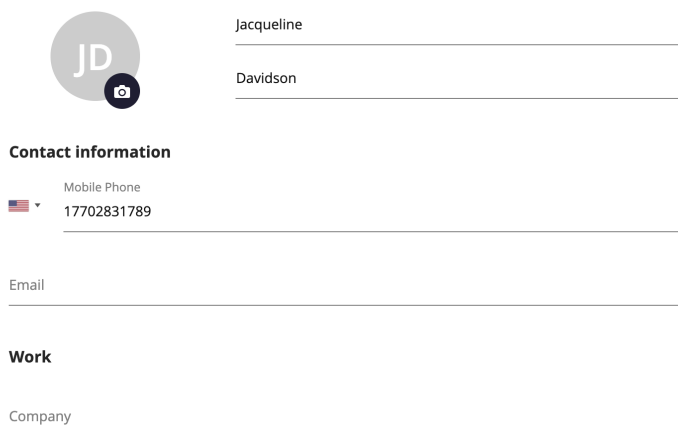
Edit or Update a Contact

1. Go to **Contacts**, and click the **Contact**.



2. Click **Edit**.
3. On the **Update Contact** screen, make your desired changes.

Update Contact



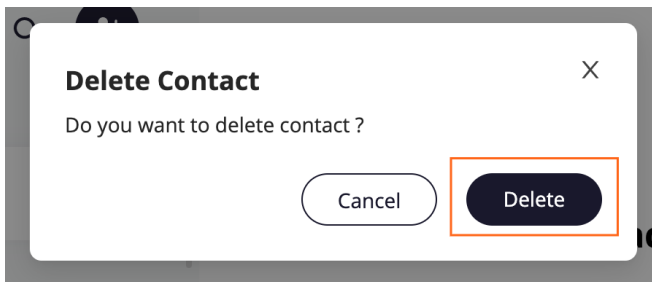
The 'Update Contact' form shows the contact's name 'Jacqueline Davidson' in two input fields. Below this is the 'Contact information' section with a 'Mobile Phone' field containing '+17702831789' and an 'Email' field. A 'Work' section has a 'Company' field. A camera icon is visible next to the profile picture.

4. Click **Update**.



Delete a Contact

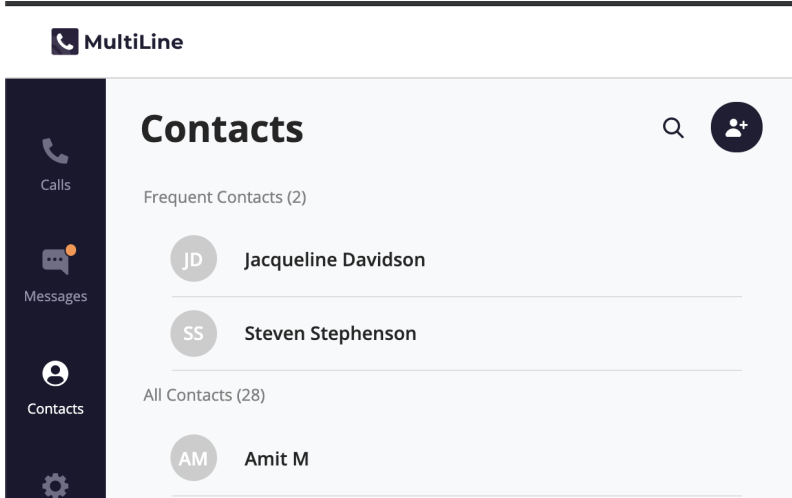
1. Go to **Contacts** and click the **Contact**.
2. Click **Delete**.
3. At the confirmation prompt, click **Delete**.



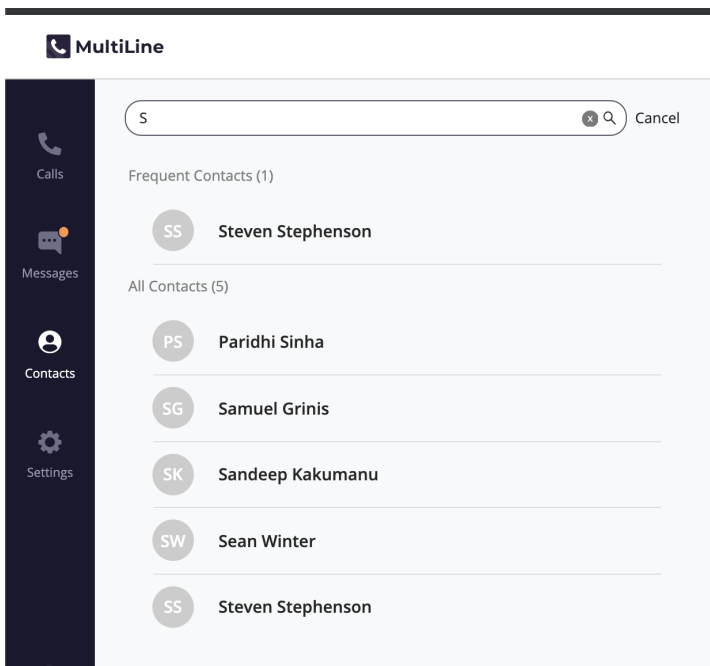
Searching Contacts

You can search contacts from the Contacts page by their first or last name.

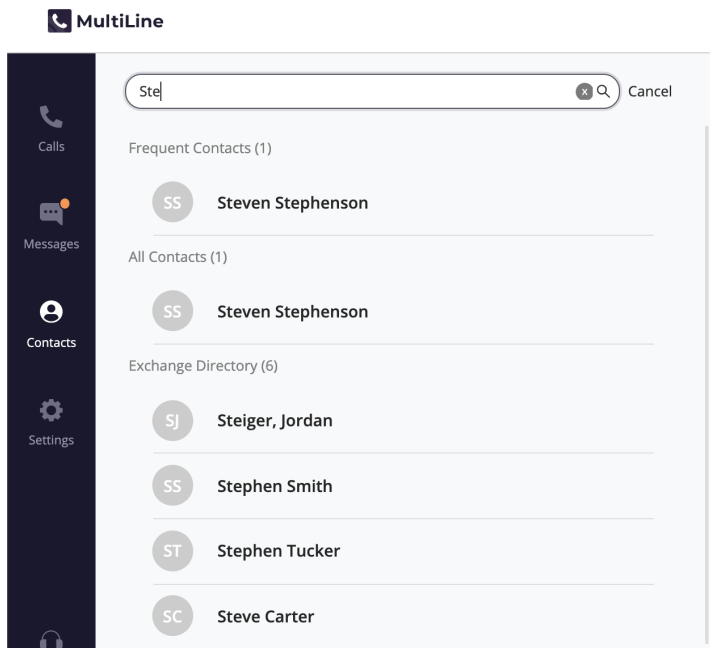
1. Click the Search icon to pull up the search field.



2. Once you begin typing the first letter, dynamic search will automatically pull up matches from your locally added contacts.



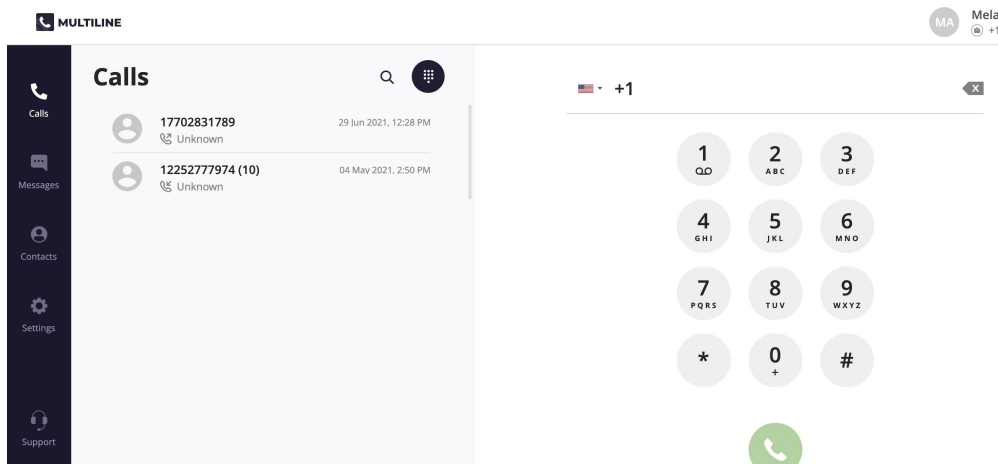
3. If you're using Exchange contacts, type at least 3 characters to search the entire GAL directory.



Voicemail

The first time you dial your voicemail you'll need to set up your voicemail password. The automated system will guide you through the steps.

1. Go to the **Dialer** screen.
2. Long press on 1 for a few seconds until it begins dialing your voicemail.

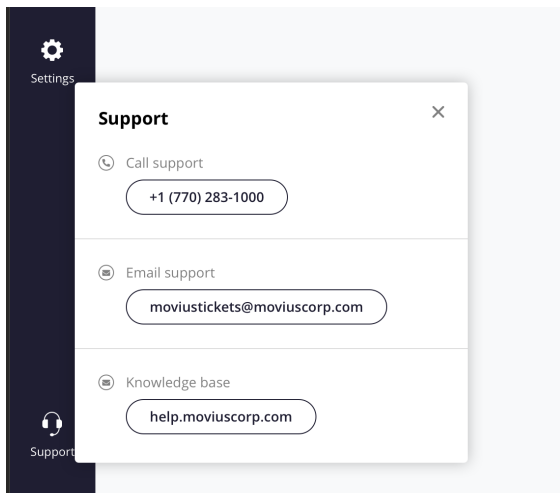


3. When prompted, dial your voicemail password.

You'll be able to listen to each voicemail, repeat, and delete voicemails.

Support

To get technical assistance or submit a bug, click the **Support** icon.




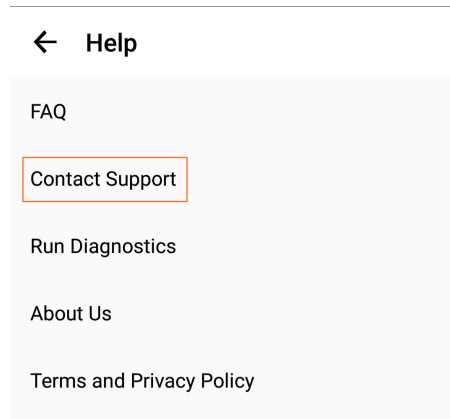
- Click the number to dial IT.
 - Click the email to send an email to IT.
 - Please use the form to describe your issue.
 - This email will automatically include logs to help diagnose your issue.
 - Click the Knowledge base URL to return here and use our self-help resources.
-

How do I contact support?

Last Modified on 10/18/2021 11:40 am EDT

When you need help from support, tap your **Settings** menu, then **Help**, then **Contact Support**.

1. Tap the menu icon  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap **Settings**, then **Help**, then **Contact Support**.

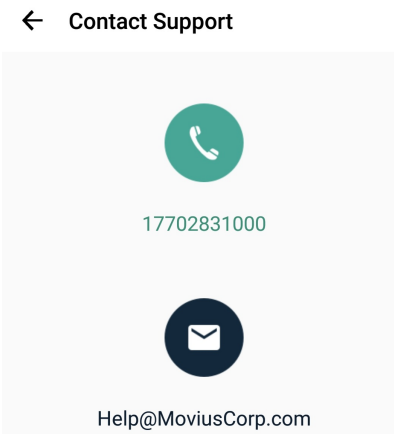


- **Email a Log to Support:**

- If you've been requested to email logs, tap the email icon to generate an email which will include logs to send to support.
- Add your explanation of the problem at the top of the generated email and send.
 - Send logs as soon as possible after a problem occurs, and include the time and date of the problem if you can.

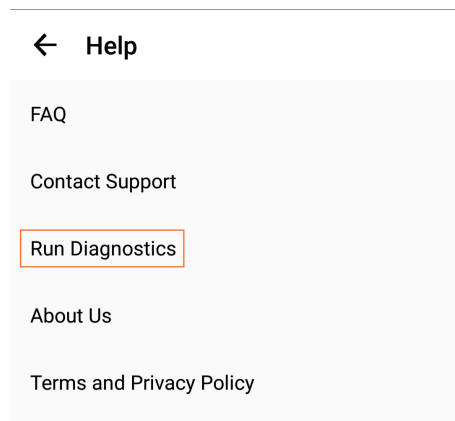
- **Call Support:**

- Tap the number to place the call using your MultiLine app.



- **Run Diagnostics:** If you've been requested to run diagnostics this feature is located in **Settings > Help > Run Diagnostics**.

- This will help identify any issues that may be causing a problem, and will generate a diagnostic report you can email to support.



We recommend using the above steps any time you can because you'll best be supported by contacting your organization's IT support and emailing logs. However, if you're having a problem getting inside the app, you can email help@moviuscorp.com.

The more details you can provide us to resolve your issue the better:

- Details of the problem experienced
 - Application having the problem (Examples: MultiLine for Intune, MultiLine Desktop, Salesforce connector)
 - Environment
 - For mobile apps: Phone OS (Examples: Android, iOS)
 - For Desktop apps: Internet browser (Examples: Chrome, Internet Explorer)
 - Time the problem occurred (include timezone)
 - If reporting a call or messaging issue, phone number dialed
 - Name of your organization
-

How do I solve call quality issues, dropped calls, or connection errors?

Last Modified on 10/18/2021 11:51 am EDT

Overview

MultiLine apps are built to continuously monitor the quality of connection and smartly adapt to changing network conditions to deliver exceptional call quality. However, when making calls in certain environments, you may need to take steps to ensure you have the right settings to make sure you connect to the best available signal.

Before you start

- Your organization can choose to restrict certain call settings. If so, you may not see all the call settings described.
- MultiLine apps depend on the quality of the data or minutes connection, if no good quality connection is available poor call quality will result.

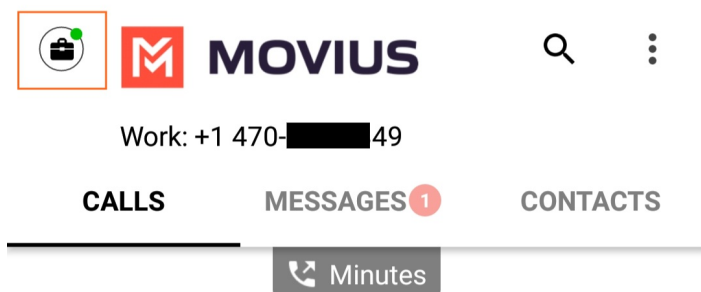
Connection Errors and Dropped Calls

If you're seeing an error message telling you that you're offline or have an unstable internet connection, or the app stalls at a connection screen, or calls drop, there are a few possible resolutions.

MultiLine apps continuously monitor the status of your internet connection. We display this to you using a colored dot on the briefcase badge in the upper left of the screen.

- If you see a green dot, this means MultiLine detects a good Internet connection.
- If you see the red dot, this means MultiLine doesn't detect a good Internet connection.
 - This could be due to a poor Wi-Fi connection or because you're in an area that isn't getting good signal.

Example: MultiLine detects a good connection (green dot)



Example: MultiLine detects a bad connection (red dot)



Work: +1 470-██████49

CALLS

MESSAGES 1

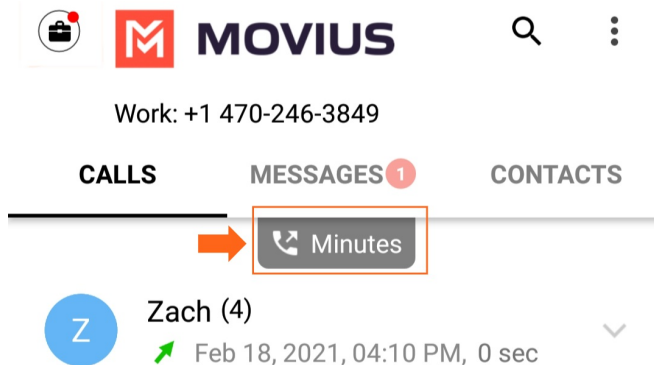
CONTACTS

Minutes

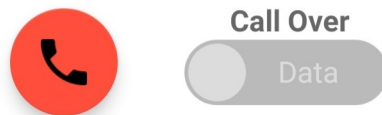
Switch to Minutes

If you already know that you're in an area without Wi-Fi or a good Data connection, then the best option is to use Minutes mode.

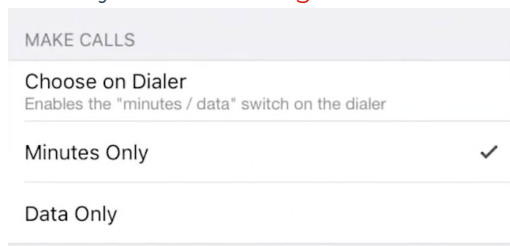
- Before making a call from your recent calls or contacts menu, click the tab to use Minutes Mode.



- Before making a call from the keypad, switch the toggle to Minutes.



- Go into your [Call Settings](#) and switch to Minutes Only.



You can also check the following:

The red icon sometimes appears when Wi-Fi and Mobile Data are turned off in your [Phone Settings](#)

- Do you have Wi-Fi turned on?
- Do you have Mobile Data turned on?

- Have you accidentally turned on **Airplane** mode?
 - Airplane mode turns off Wi-Fi and Mobile Data.

Are you connected to the correct Wi-Fi in your **Phone Settings**?

- Did you accidentally sign into the wrong Wi-Fi network?
- If you only have a few bars of Wi-Fi signal, you may need to connect to better Wi-Fi or to Mobile Data in your Phone Settings.

If you're connected to Mobile Data, how many bars do you have?

- If you only have 1 or 2 bars, your call quality may not be good and you should either connect to Wi-Fi or switch to Minutes.

If you see a green dot, but still face issues, [please send logs to support](#).

Call Quality Issues

What makes MultiLine different from other apps that provide you an additional number, is that we enable you with a real number provided by a carrier. This means you can make calls from our app using the mobile voice network, data, or WiFi. We've built the MultiLine app to be low bandwidth so that it won't degrade your call experience.

Our patented technology and Call Settings give you a lot of options, but just like when you make calls from your phone normally, your call quality can be impacted by your mobile device and your environment.

See [What does a call over data vs. minutes really mean?](#) for information about when you might choose between our different Call Settings.

See [Set your Call Settings](#) for instructions on how to set your desired Call Settings.

Do some connection troubleshooting

- Keep a charged battery
 - One of the easiest things anyone can do is to make sure you keep your battery charged. Having a low battery can cause your connection quality to drop significantly.
 - Most cellphones have "power-saving" settings to decrease battery usage, enable this at peak business hours and you'll still receive notifications, calls, and messages from the MultiLine app.

Troubleshooting data

If you're using data and seem to be having connection issues, there are a few things to keep in mind.

- Try to find a better place to take calls.
 - It's best to be somewhere free from interfering electronics or signal-blocking obstacles such as concrete walls, trees, or hills. Try moving near an open window, going upstairs, or stepping outside, if possible.
- Try resetting your Network Settings.
 - Consult your phone's instruction manual to do this. Sometimes a reset is just the ticket

to improve your connection.

- Try going hands-free.
 - You may not know that the way you hold your phone could be causing your own hand or face to block the signal. Just make sure you place the phone vertically on a surface in an area where you get good signal.

Troubleshooting Wi-Fi

Fortunately, with MultiLine, you can choose to use Wi-Fi instead of data if your signal isn't great in your home. However, if you're sharing your Wi-Fi with family your connection may be affected by the traffic from your family's devices. You also may reconsider your Wi-Fi setup to meet your needs now that you or other family members are working or studying from home.

- Try turning your router off and on again.
 - Sometimes a simple reset is all it takes to get better signal for everyone.
 - Try moving your router.
 - Your router needs to be in a place where the signal won't be blocked by objects or people. Many common electronics such as TVs, microwaves, washing machines can block signal. Even wall studs can interfere with your signal.
 - Try changing your Wi-Fi channel.
 - All routers come with the ability to broadcast on 6 different channels. Most people use the default of channel 1 or channel 6, so if you live in an apartment complex, you may improve performance by switching to a lesser used Wi-Fi channel. Consult your router's manual for how to adjust this setting.
 - Try splitting your Wi-Fi band.
 - This improves speeds by decreasing interference from the multiple devices that are using the Wi-Fi, by routing their traffic to separate bands. If your office is near the router, the 5 GHz wireless frequency is typically faster and less busy than the 2.4 GHz wireless frequency.
-

How do I stop spam callers?

Last Modified on 10/18/2021 11:56 am EDT

Spam calls are an unfortunate reality of mobile communications, but there are several strategies we use for MultiLine that work to reduce the number of spam calls received, and features for our users to help combat spam calls that still make it through these measures.

When people retire their numbers, carriers take these numbers for a period of time and shut them off. This causes the systems spammers and robo-callers use to identify the numbers as inactive and remove the numbers from their systems. Despite these measures, we have found that about 5% of the numbers we purchase will receive a higher than normal percentage of spam calls.

Since October 2021, MultiLine users are noticing far less spam calls thanks to the implementation of state of the art STIR/SHAKEN protocol. The service intercepts calls that are likely scam and routes them to MultiLine voicemail.

Register with Do Not Call

- These registries discourage “legitimate” marketers from calling the number for marketing purposes since they impose fines for unapproved calls.
- They can’t discourage out-of-country or illegitimate marketers from calling since they don’t follow most legal guidelines.

USA

Register with Do Not Call at www.donotcall.gov

Australia

Register with Do Not Call at www.donotcall.gov.au

Canada

Register with Do Not Call List at <https://lnnte-dncl.gc.ca/en>

India

Register with National Customer Preference Register (NCPR) by dialing 1909 or by sending SMS to 1909. You can also register using TRAI DND 2.0 mobile app.

New Zealand

Register with Do Not Call at <https://www.marketing.org.nz/maDNC?Action=New>

UK

Register with Telephone Preference Service at <https://www.tpsonline.org.uk/register>

Block Calls

MultiLine users should aggressively use the call blocking feature that is built into the application so

that any spam or robo-caller won't ring on the phone a second time. Blocking calls is also the best solution to prevent people or companies trying to reach the previous owner of the phone number from disturbing users. Currently MultiLine users can block up to 50 numbers, but very soon we will enable blocking 1000s of numbers.

Add Known Callers

Avoid picking up spam calls by adding known callers and phone numbers to your contact list.

- Any inbound calls from callers in the contact list will have their name display in the inbound call popup.
- MultiLine Users have three options for adding contacts:
 1. Sync with the existing contact list on their phone.
 2. Sync with an exchange server, for example, their corporate BlackBerry or Outlook contacts.
 3. Add them manually within the application.

Number Replacement

If your number consistently gets more than about 5 unsolicited calls per day, and you've tried the above measures to no avail, you can request a new phone number. Go to the support feature in the MultiLine App by tapping **Settings**, then **Help**, then **Contact Support** and your MultiLine Administrator can escalate the situation through the proper channels.

Why is my phone not "waking up" to notify me I received a MultiLine SMS?

When I make or receive calls, why do I see a number that I do not recognize?

Last Modified on 10/29/2021 12:52 pm EDT

When Movius MultiLine is set to use the regular minutes in your carrier plan, you may notice a different number together with the one you are calling or getting the call from.

Don't worry – it's supposed to do that. We call that number a **routing number** and its purpose is to relay the calls through our service to display your Movius MultiLine caller ID and keep your personal phone number private. We associate routing numbers with your contacts and use these routing numbers whenever you place or receive a call on Minutes mode.

If you are a MultiLine user in U.S., the Movius Routing Numbers you will see are from the 913 area code (Kansas). If you are a MultiLine user in the UK, the Movius Routing numbers you will see are UK 07 mobile numbers.

Why is my ringtone different in Minutes mode than Data mode?

Last Modified on 10/29/2021 1:11 pm EDT

When using Minutes mode for incoming calls, the ringtone is based on your Phone settings. When using Data mode for incoming calls, the ringtone is based on your MultiLine settings.

Why aren't my clients seeing my MultiLine number as my caller ID?

Last Modified on 10/29/2021 12:53 pm EDT

Please check that you have enabled caller ID in Multiline application in [Settings > Call Settings > Show my caller ID](#).

Are picture messages I send and receive in MultiLine stored in my camera roll or anywhere on my personal device?

Last Modified on 10/29/2021 1:05 pm EDT

No. We understand our customers need the separation of business and personal, so photos or multimedia sent and received **won't save** to your personal camera roll or any folder on your personal device.

How do I update my MultiLine app?

Last Modified on 10/29/2021 12:55 pm EDT

We recommend turning on automatic updates for your MultiLine app. However, you can also choose to update manually if you prefer.

- For iOS, follow App Store instructions [here \[external link\]](#).
 - For Android, follow Google Play instructions [here \[external link\]](#).
-

How do I find my MultiLine app version number?

Last Modified on 10/29/2021 12:58 pm EDT

To find your app version for troubleshooting purposes, go to **Settings**, then **Help**, then **About Us**.

If you can't open the app, you can find your app version.

iPhone

1. Open the **Settings** app
2. Go to **General > Usage**
3. Find the **Storage** section and a list of your apps should appear
4. Find and tap on the MultiLine app to see App info and find the version number

Android

1. Tap and hold the MultiLine app to reveal the menu and select "App Info"
2. The version number will appear at the very bottom of this screen.

If the instructions above aren't applicable to your device or phone OS, try searching the web for "Find version number for app" for your specific device or phone OS.

Error: Current version is not supported, please upgrade to latest version from Play store

Last Modified on 10/29/2021 12:56 pm EDT

It's always important to update your applications, MultiLine included. Updates may include new features, security updates, and bug fixes. Your administrator will set a minimum version that personnel can use before this error message will appear and you won't be able to continue using the MultiLine app until you update the application.

If you face further difficulty, contact your IT administrator. To help them assist you, include the version of the MultiLine app, your version of iOS or Android OS, and your version of the App Store or Play Store.

- Check version of iOS: <https://support.apple.com/en-us/HT201685>
 - Check version of Android OS: <https://support.google.com/android/answer/7680439?hl=en>
-

Error: Invalid Company / Org ID. Please try again.

Last Modified on 10/29/2021 12:59 pm EDT

Due to security reasons, we can't be more specific about what went wrong with your credentials. If you've typed in your credentials exactly as included in your invitation there are a few reasons you may see this error:

- You received a more recent invitation that has replaced your older invitation
- You used MultiLine with another organization previously, and they did not delete your user account (you can only have one MultiLine account)
- You are supposed to port in the number on your device to MultiLine and get a new number for your personal, but you haven't swapped your SIM card with a new one before onboarding

Also try...

1. Make sure to type the Company / Org ID from your invitation slowly and carefully with no typos.
 - If for any reason you've received multiple invitations, use the most recent credentials.
 2. Temporarily turn off the WiFi connection for your phone when typing in the credentials.
 - [Turn off WiFi for iOS or Android \[External Link\]](#)
 - We recommend using an active cellular Data connection if you face issues because some device's security settings may block transmission of the credentials over a WiFi connection.
 3. When prompted for your phone number to send the PIN, make sure you're entering your active personal phone number of the device (not the MultiLine number, or a number that is being ported into MultiLine service).
 1. A PIN will be sent via text message immediately to this personal phone number.
 2. Enter the received PIN into the MultiLine application when asked.
 4. If you continue to get the Invalid Company / Org ID error, uninstall the MultiLine application from your phone, reinstall the MultiLine application, and re-try using the Credential information included on your invitation.
 5. If additional guidance or a complete new set of credentials is needed, please contact your company administrator using the information in the invitation.
-

Why am I prompted to "Press any key"
when using Minutes mode?

What is my Organization ID? What is my username and password?

Last Modified on 10/18/2021 11:28 am EDT

MultiLine applications are available by invitation only to prevent unauthorized users. Your IT organization will send you an SMS or email containing your credentials. If you can't find your invitation, ask your IT administrator to send you a new one.

If you're seeing “Invalid Company/ Org ID. Please try again”

Due to security reasons, we can't be more specific about what went wrong with your credentials. If you've typed in your credentials exactly as included in your invitation there are a few reasons you may see this error:

- You received a more recent invitation that has replaced your older invitation
- You used MultiLine with another organization previously, and they did not delete your user account (you can only have one MultiLine account)
- You are supposed to port in the number on your device to MultiLine and get a new number for your personal, but you haven't swapped your SIM card with a new one before onboarding

Also try...

1. Make sure to type the Company / Org ID from your invitation slowly and carefully with no typos.
 - If for any reason you've received multiple invitations, use the most recent credentials.
 2. Temporarily turn off the WiFi connection for your phone when typing in the credentials.
 - [Turn off WiFi for iOS or Android \[External Link\]](#)
 - We recommend using an active cellular Data connection if you face issues because some device's security settings may block transmission of the credentials over a WiFi connection.
 3. When prompted for your phone number to send the PIN, make sure you're entering your active personal phone number of the device (not the MultiLine number, or a number that is being ported into MultiLine service).
 - A PIN will be sent via text message immediately to this personal phone number.
 - Enter the received PIN into the MultiLine application when asked.
 4. If you continue to get the Invalid Company / Org ID error, uninstall the MultiLine application from your phone, reinstall the MultiLine application, and re-try using the Credential information included on your invitation.
 5. If additional guidance or a complete new set of credentials is needed, please contact your company administrator using the information in the invitation.
-

Error: Invalid Company/Org ID. Please try again

Last Modified on 10/18/2021 2:10 pm EDT

Due to security reasons, we can't be more specific about what went wrong with your credentials. If you've typed in your credentials exactly as included in your invitation there are a few reasons you may see this error:

- You received a more recent invitation that has replaced your older invitation
- You used MultiLine with another organization previously, and they did not delete your user account (you can only have one MultiLine account)
- You are supposed to port in the number on your device to MultiLine and get a new number for your personal, but you haven't swapped your SIM card with a new one before onboarding

Also try...

1. Make sure to type the Company / Org ID from your invitation slowly and carefully with no typos.
 - If for any reason you've received multiple invitations, use the most recent credentials.
 2. Temporarily turn off the WiFi connection for your phone when typing in the credentials.
 - [Turn off WiFi for iOS or Android \[External Link\]](#)
 - We recommend using an active cellular Data connection if you face issues because some device's security settings may block transmission of the credentials over a WiFi connection.
 3. When prompted for your phone number to send the PIN, make sure you're entering your active personal phone number of the device (not the MultiLine number, or a number that is being ported into MultiLine service).
 - A PIN will be sent via text message immediately to this personal phone number.
 - Enter the received PIN into the MultiLine application when asked.
 4. If you continue to get the Invalid Company / Org ID error, uninstall the MultiLine application from your phone, reinstall the MultiLine application, and re-try using the Credential information included on your invitation.
 5. If additional guidance or a complete new set of credentials is needed, please contact your company administrator using the information in the invitation.
-

How do I get my credentials for MultiLine Desktop?

Last Modified on 11/02/2021 10:16 am EDT

Credentials to sign in to MultiLine Desktop are in the MultiLine invitation.

- **New MultiLine user**
 - Your MultiLine Desktop credentials will be sent to you by your IT admin in a MultiLine invitation by email.
 - Use the same username and password for activating MultiLine and logging into MultiLine Desktop for the first time.
 - Click the link to access the MultiLine Desktop web portal (pin the tab or save it to your bookmarks bar for easy retrieval).
- **Existing MultiLine users**
 - Your organization's IT admins will provide you the unique URL of your MultiLine Desktop web portal (pin the tab or save it to your bookmarks bar for easy retrieval).
 - You can use the same username and password from your MultiLine invitation to log into MultiLine Desktop.
 - If you've lost your MultiLine invitation:
 - Set a new password by using *Forgot Password*
 - Request your IT administrator to send you a new one.

When you log in to MultiLine Desktop for the first time, you'll be asked to change your password for security purposes. *Note: Continue to use the password in your latest MultiLine invitation whenever you need to reactivate the MultiLine mobile app.*

Note

You receive MultiLine invitations from your company or organization's IT administrators. Movius representatives cannot send you invitations.

Error: No Numbers Available

Last Modified on 10/18/2021 1:54 pm EDT

Problem

You see a "No Numbers Available" error screen when you attempt to activate MultiLine.

Why?

For you to receive the number you will use for calling and messaging in MultiLine, your organization needs to purchase or free up a number for you to use.

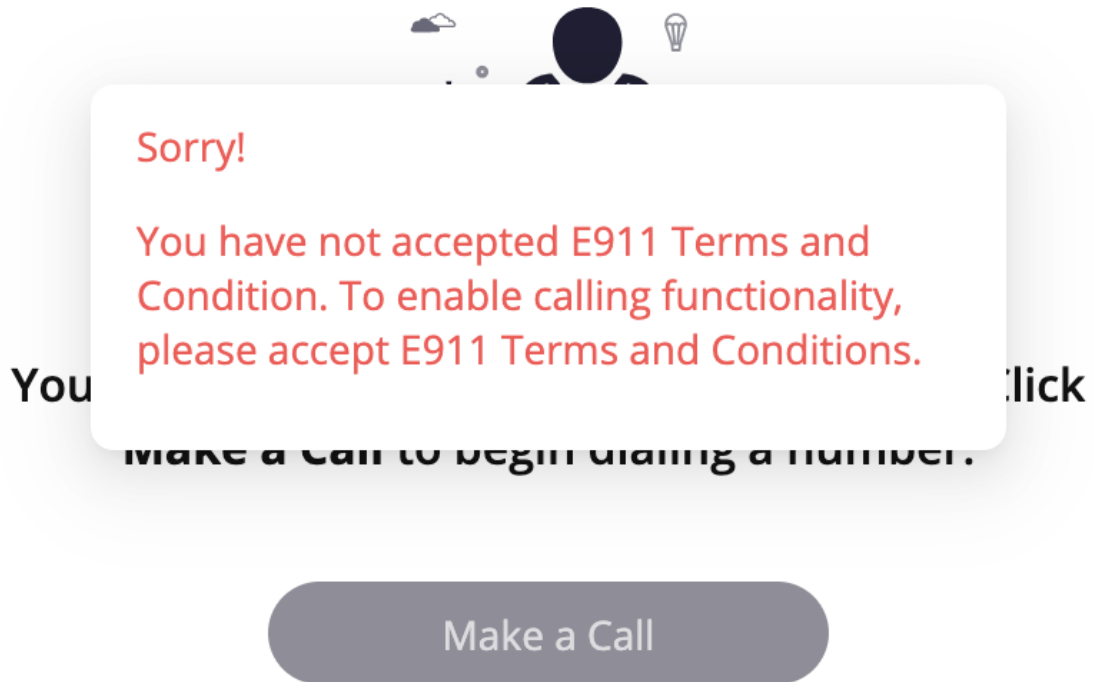
Resolution

You must contact your company's IT team and inform them you saw this error.

Error: Sorry! You have not accepted E911 Terms and conditions

Last Modified on 11/02/2021 10:12 am EDT

When you try to make your first call you may see *the below error*:



This is because we are required to get your E911 address from you before we can provide the calling service.

To resolve, go to **Settings > E911 Address** and click **Add Address**. Enter your address information into the fields. Your ability to call will be enabled when complete. See [Update your E911 Address](#) for more information.

Why am I asked to sync my contacts again?

Last Modified on 11/02/2021 10:13 am EDT

There are two reasons you may need to resync your contacts: you're using multiple devices or browsers, or your organization policy forces the sync to expire.

Using multiple devices or browsers

- We must request you sync your contacts each time you use a new device or browser. Because we respect the privacy of your contacts and have not uploaded or stored them anywhere, each device and browser has its own Index Database that we use to sync your contacts.
- Once you sync your contacts for a given device or browser, you should not be asked to sync again.

Organizational policy

For security purposes, some organizations may occasionally force your sync with Desktop and other applications to expire. If you have questions about this, contact your IT administrator.

Why is there no ring tone played for some incoming calls to MultiLine Desktop? (Chrome/Safari)

Last Modified on 11/02/2021 10:15 am EDT

Many web users were bothered by nuisance audio coming from web sites that automatically play when a page is loaded, such as that from videos and advertisements. To address this, Chrome and Safari browsers added a feature that blocks audio by default from web pages if the page or tab is refreshed, but not clicked on by the user.

Therefore, if you haven't accessed the MultiLine Desktop tab since the last time it refreshed (for example, if you closed and restarted chrome and loaded your tabs from the previous session) the ringing sound will be blocked. However, you'll still be able to see the visual notification of the incoming call.

To unblock the ringtone from being played, open the tab where MultiLine Desktop has recently refreshed and click anywhere within the MultiLine Desktop application and this should ensure that the ring sound will play.

I'm trying to send the client a message, but when I tap on the text field it won't let me enter anything. Why?

Last Modified on 11/03/2021 5:25 pm EDT

Conversation sessions are limited to a 24 hour timespan.

After 24 hours of inactive chat, WhatsApp requires businesses to use the template feature to initiate conversations with customers. These templates are approved ahead of time to make sure they're transactional in nature and are not cold messages or promotional/advertisement messages. If you tap the template button, you'll see a list of messages that you're able to send to the customer. Tap the message to select it, then press the send button.

My client accidentally rejected my opt-in request. What do we do?

Last Modified on 11/03/2021 5:26 pm EDT

When the client opted out, they received instruction about how to opt-in again. Your client only needs to reply with another message opting in, usually “yes”. If the client replies to the conversation with any other message, a new opt-in message will be sent to the user.

Why do I see “The contact hasn't responded to the opt-in request for more than 24 hours. You can try sending the request again.”?

Last Modified on 11/03/2021 5:26 pm EDT

In order for you to message with a client, they must accept your opt-in request. You're allowed to send a new one every 24 hours. If accepted, you'll be able to message with the customer. If it's rejected, we'll let you know, and you won't be able to send any more opt-in requests to the customer.

Why did I get the error message “Looks like this contact is already messaging with another MultiLine user. . .”?

Last Modified on 11/03/2021 5:26 pm EDT

If someone in the same line of business as you is talking with a client, WhatsApp will not allow you to message the client. Contact your administrator.

Why did a client receive the auto message “. . . We're not currently using this number to accept WhatsApp messages.”?

Last Modified on 11/03/2021 5:27 pm EDT

The MultiLine administrator at your company has deactivated WhatsApp for your number. Contact them to resolve.

MultiLine for Intune says I need to install Company Portal, but I already have it?

Last Modified on 11/02/2021 10:05 am EDT

If you already installed Company Portal, but MultiLine for Intune has an error message saying that you need to install it, you need to enable it:

Enable Intune Company Portal

1. Click the link to **Go to Store**.
 2. Click the **Enable** button.
 3. When the **Enable** button changes to **Open**, go back to the MultiLine for Intune app and try starting again.
-

Can't Email Support

Last Modified on 11/02/2021 10:07 am EDT

If you try to email support and your email program isn't activated, resolve with the following steps:

When you reinstall Company Portal this will clear the data for your MultiLine app, including all your settings. If you're using Local Contacts, these contacts will be lost.

1. Reinstall Company Portal and Outlook.
 2. Resign into your Microsoft account for Outlook and MultiLine.
 3. Find your email invitation so you can reactivate the MultiLine application.
 4. Reconfigure your settings (Call Settings, Call Handling, Contact Settings) as desired.
-

How to uninstall the Workspace/Company Portal

Last Modified on 11/02/2021 10:09 am EDT

Follow these instructions if you're instructed to uninstall Company Portal for troubleshooting purposes.

- If you don't have a work profile installed (you tapped Postpone during onboarding), you can delete Company Portal like any other app.
 - If you have a work profile installed (you did not tap Postpone during onboarding), your IT admin will have to enable this for you. Then you'll need to delete the entire Workspace. In the Workspace, tap the menu in the upper right, then click **Uninstall**.
 - *Note: Because you're deleting the Workspace, you'll be deleting all your corporate apps including MultiLine for Intune. Therefore you'll need to reinstall it after you reinstall Company Portal and the Workspace. You can use the same invitation you used to onboard with MultiLine for Intune for reinstallation.*
-

I synced my contacts with an Exchange server, why don't I see any contacts in the list?

Last Modified on 11/03/2021 5:21 pm EDT

I chose Native Contacts for my contact source, but my Contacts list is empty? Why aren't my contacts there?

Last Modified on 11/03/2021 5:24 pm EDT

Native Contacts is one of three Contact Settings you can use with all versions of MultiLine. It pulls contacts that you were using with your personal number into MultiLine.

When you use Native Contacts with MultiLine for Intune, it pulls your contacts from inside the Work container instead of your personal contacts. This is because the Work container completely separates your work use of the phone from your personal use of the phone.

If you haven't been using your Work contacts and need to import your personal contacts instead, do the following:

1. Export your contacts as a .vcf file and email them to yourself in Outlook.
 2. Download the file on your Desktop and open it. *Outlook will begin the process of adding the contacts from the .vcf file to your Exchange contacts.*
 3. Then [set up MultiLine to use Exchange contacts](#).
-

I synced my contacts with an Exchange server, why don't I see any contacts in the list?

Last Modified on 11/03/2021 5:21 pm EDT

I chose Native Contacts for my contact source, but my Contacts list is empty? Why aren't my contacts there?

Last Modified on 11/03/2021 5:23 pm EDT

If you're using MultiLine for Intune or Movius for BlackBerry, MultiLine will not sync with your personal Contacts app. Instead, it will sync with your corporate Contacts app.

What devices does MultiLine work on?

Last Modified on 11/01/2021 1:54 pm EDT

- MultiLine mobile applications work on any Android or iOS smartphone
 - MultiLine Desktop applications work on any desktop or tablet
-

Will I see missed calls when my Business Hours are set?

Last Modified on 11/03/2021 8:15 pm EDT

The Business Hours schedule offers sliders to set the hours you're available on your MultiLine number. Any incoming calls that are received outside those set hours will automatically be forwarded to your MultiLine voicemail and the messages will appear in your MultiLine messages list and won't register as a missed call.

If you prefer to see missed calls instead, turn off Business hours schedule. You can silence your phone, or just [silence MultiLine notifications](#), if you don't want MultiLine to ring your phone.

Are picture messages I send and receive in MultiLine stored in my camera roll or anywhere on my personal device?

Last Modified on 11/01/2021 1:52 pm EDT

No. We understand our customers need the separation of business and personal, so photos or multimedia sent and received **won't save** to your personal camera roll or any folder on your personal device.

Can a call switch from using WiFi to minutes during an ongoing call?

Last Modified on 11/01/2021 1:53 pm EDT

You can use Call Settings to be flexible about using Wi-Fi or Minutes when placing or receiving calls. Calls will handover from WiFi to LTE and vice versa seamlessly. However, it isn't possible for an ongoing call to switch from WiFi to Minutes.

Minutes mode is a separate radio channel and hence cannot pick up a call on minutes and hand over to data and vice versa.

To continue your conversation, you'll need to hang up and redial the number. MultiLine will switch to make the call over the available method.

How does MultiLine protect my privacy?

Last Modified on 11/03/2021 8:10 pm EDT

MultiLine applications address a common problem for BYOD adoption among regulated users. Carrying multiple phones around, your work phone and your personal phone, would be cumbersome. However, if you use your personal phone for work, or your work phone for personal, you potentially would sacrifice your privacy.

MultiLine provides you a separate number, separate contact list, and separate voicemail. It doesn't collect any information from your personal calls, contacts, or messages- nor does it put any corporate information on your personal device. This way, your personal number and personal life can be separate from work.

MultiLine EMM integrations can take this even further, by fully separating work apps from personal apps, and ensuring that your organization can ensure compliance without touching your private life.

Does MultiLine use my personal phone plan's minutes and data?

Last Modified on 11/01/2021 1:53 pm EDT

Yes, when using Minutes or Data mode. MultiLine does support calls and texts over Wi-Fi, which is free and doesn't use the underlying phone plan. See [Call Settings: Set Data or Minutes calling modes](#).

When you use Minutes mode, when you make and receive calls, MultiLine uses the minutes included in your cellular phone plan. For those with unlimited minutes plans, there is no added cost. For those with limited minutes plans, it is subject to company policy. Often the companies we work with will give a small stipend to cover the monthly charge.

When you use Data mode, when you make and receive calls, MultiLine uses the data included in your cellular phone plan. For those with an unlimited data plan, there is no added cost. For those with a limited data plan, it is subject to company policy. Often the companies we work with will give a small stipend to cover the monthly charge.

Note: The average data usage for MultiLine users is 100MB per month. You can see your usage by going to MultiLine Settings > Usage.

How do I purchase a subscription for MultiLine?

Last Modified on 11/01/2021 1:53 pm EDT

If you're looking to buy MultiLine for your organization, please [book a call with us](#).

Why does MultiLine request access to my contacts?

Last Modified on 11/03/2021 8:01 pm EDT

MultiLine does not read, store, transmit, or share any of your personal Contacts information. It does add a single contact to your personal Contacts list which is used for routing the calls.

The Contacts permission is required for the following reasons:

- Proper display of Caller ID information,
 - Enabling one-time import of contacts into MultiLine Contacts,
 - Enabling sync with your Contacts app.
-

If I set Do Not Disturb on my mobile, will it apply to MultiLine Desktop?

Last Modified on 11/02/2021 10:21 am EDT

Yes, if you set Do Not Disturb on your mobile, MultiLine Desktop will not ring either and the calls will go to voicemail.

If I set a Business Hours schedule on my mobile, does it apply to MultiLine Desktop?

Last Modified on 11/02/2021 10:22 am EDT

Yes, if you set Business Hours, calls outside business hours will go to your voicemail and MultiLine Desktop will not notify you of the calls.

Can I upload my mobile MultiLine local contacts or native contacts to MultiLine Desktop?

Last Modified on 11/02/2021 10:22 am EDT

We don't currently support directly uploading MultiLine local contacts or native contacts to MultiLine Desktop. There is no sync between mobile MultiLine local contacts and MultiLine Desktop.

Currently, we support access to Exchange Contacts. If you add your local or native contacts to the Exchange server, you'll be able to use them in MultiLine Desktop.

If I block a number on mobile, will the number be blocked in MultiLine Desktop?

Last Modified on 11/02/2021 10:24 am EDT

No, there is no call blocking currently for Desktop. We are currently working on adding the ability to block numbers in MultiLine Desktop.

How can I get my local contacts back after switching to Exchange? Can I switch my email used?

Last Modified on 11/02/2021 10:26 am EDT

You can only use Exchange contacts with your registered email. Once you sync to Exchange, it is impossible to return back to local contacts. We are working on adding the ability to return to local contacts, and to use Native and Local contacts options.

Can I change my ringtone in MultiLine Desktop?

Last Modified on 11/02/2021 10:26 am EDT

Unlike the mobile app, there's no option to change ringtone at at this time. We plan to offer it in a future release.

Does MultiLine access my personal WhatsApp?

Last Modified on 11/02/2021 9:55 am EDT

No, MultiLine doesn't access your personal WhatsApp at all. When you use MultiLine as your official business app to securely call and message external clients, you'll be using your separate business number which is connected to your company's official WhatsApp account. This keeps your work messaging completely separate from your personal number and personal WhatsApp account.

Can all the messages I send and receive using the WhatsApp connector be recorded?

Last Modified on 11/02/2021 9:56 am EDT

Your organization can compliantly and securely capture all the messages you send and receive on WhatsApp Messaging Connector, if configured.

Can I make a WhatsApp voice call, video call, or send voice messages in MultiLine?

Last Modified on 11/02/2021 9:57 am EDT

This is only a messaging service, and does not support voice, video, or multimedia messages. If you or your client tries to send unsupported content, the person who tries to send it will see an explanatory automessage.

Do opt-in requests time out?

Last Modified on 11/02/2021 9:58 am EDT

No, once you send an opt-in request, your client can say "Yes" at any time to reply. However, if you think they'll benefit from a reminder, you can send a new opt-in every 24 hours.

What is my client's experience when we use the WhatsApp messaging connector?

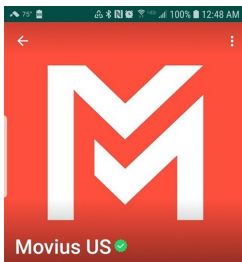
Last Modified on 11/02/2021 9:59 am EDT

The contact will receive the messages natively in their WhatsApp application.

- Your account will be associated with a branded business profile for the client to view.
 - The client can access the business profile by clicking the green check.



- The user profile appears



- Messages you send will include your name at the start, as set up by your administrator (Example: "Melanie"):

[Melanie] Just wanted to let you know to check your email for some important documents. Please fill them out and send back to us as soon as you can. Let me know if you see it, or need me to resend it over.

4:14 PM

Thank you, Melanie I'll take a look now.

4:15 PM ✓✓



Type a message



Can I WhatsApp between MultiLine users in the app?

Last Modified on 11/02/2021 10:00 am EDT

No. The other party is required to have an active account on the WhatsApp messaging app.

The WhatsApp messaging connector only allows you to send WhatsApp messages to WhatsApp users from within MultiLine. It is essentially a bridge from MultiLine to a WhatsApp business account. That business account can only send and receive messages from WhatsApp users, not from MultiLine users.

Note: the WhatsApp business account is associated with a Twilio number rather than your MultiLine number. Any WhatsApp messages to that Twilio number from a WhatsApp user will be received by the MultiLine app. If someone attempts to WhatsApp your MultiLine number, it will not work, because your MultiLine number is not associated with the WhatsApp business account.

Why do I need to install Company Portal?

Last Modified on 11/02/2021 10:03 am EDT

The Intune Company Portal provides you access to corporate apps and resources.

- You need to set up Intune Company Portal App before installing MultiLine for Intune and other Work apps.
- During the initial setup, the app requires that you authenticate yourself with your organization. It then informs you of any device settings you must upgrade. *For example, organizations often set minimum or maximum character password requirements on your device.*

For more information, see [What is device enrollment? \[External Link\]](#).

What information can my organization see when I enroll my device in Intune?

Last Modified on 11/02/2021 10:04 am EDT

See [What information can my organization see when I enroll my device? \[external link\]](#)

Why do I need to install Microsoft Authenticator?

Last Modified on 11/02/2021 10:04 am EDT

If you don't have Microsoft Authenticator already, you'll be prompted to install it when installing Company Portal. You'll need Microsoft Authenticator to use Single Sign On, so that you don't have to keep entering your password every time you launch the app.

Why do I sometimes see "You're using this app outside the Workspace" when I place a call?

Why is there a blue BlackBerry floating icon in the Movius app?

Last Modified on 11/02/2021 10:29 am EDT

The Movius for BlackBerry app is integrated with the BlackBerry Dynamics secure environment, separating it from your personal apps and having a blue floating icon that securely connects it with other BlackBerry secure apps.

The best way to make calls with Movius is to go directly through the Movius app and selecting a contact from the Contacts tab.

Movius also supports click-to-dial from BlackBerry Work, so you can conveniently click on a phone number in your BlackBerry Work email or calendar and be able to call directly from the Movius app.

When clicking a number to dial from BlackBerry Work, why does Movius switch to BlackBerry Work and then again back to Movius?

Last Modified on 11/02/2021 10:30 am EDT

Movius for BlackBerry is integrated with BlackBerry Dynamics authentication methods and policies.

When Movius for BlackBerry is launched, if the BlackBerry Dynamics authentication policy is set to delegate, the BlackBerry Dynamics framework automatically calls BlackBerry Work.

If the user is already authenticated with BlackBerry Work, the user will not be prompted for any information and BlackBerry Work will return control to Movius for BlackBerry. If the user is not authenticated with BlackBerry Work, the user will have to authenticate with the BlackBerry Work password or with Touch ID / Face ID or Fingerprint Authentication on supported iOS and Android devices.

Can Movius for BlackBerry access contacts in the address book in the phone? Can I just go to the contact and dial through Movius for BlackBerry?

Last Modified on 11/02/2021 10:31 am EDT

Movius for BlackBerry users can add contacts using three different contact source settings. In the MultiLine Settings menu, the Contact Settings offer three options for you to select from:

1. Native Contacts: Movius will use the contacts in the address book in the phone. *Note: If this is not an available option for your organization, it will be grayed out.*
2. Local Contacts: Movius will start with an empty list of contacts for you to segregate business contacts into. *Note: If this is not an available option for your organization, it will be grayed out.*
3. Exchange Contacts: Movius will use the corporate contacts and Global Address List as available in BlackBerry Work.

In addition to dialing directly from Movius for BlackBerry, users can click-to-dial with Movius for BlackBerry from BlackBerry Work Contacts, BlackBerry Work E-mail and BlackBerry Work Calendar.

Movius for BlackBerry is designed not to dial from the address book in the phone to meet the imperatives of privacy by design with personal and business separation.

Install Guide: MultiLine Apps

Last Modified on 11/03/2021 7:51 pm EDT

Read this guide to learn how to set up your MultiLine organizations in the Management Portal.

Overview

This article is intended for administrators that are overseeing or participating in the initial setup of Management Portal.

Part 1: Set up Organization

Step 1 - Manage organizations

Step 2 - Customize mobile app

Step 3 - Customize invite

Part 2: Invite Admins

Step 1 - Create admin roles

Step 2 - Invite admins

Part 3: Invite users

Step 1 - Create user permissions

Step 2 - Add users

Install Guide: Salesforce Connector

Last Modified on 10/26/2021 3:36 pm EDT

Read this guide to install MultiLine Salesforce connector in the Management Portal. For installing MultiLine Salesforce connector in Salesforce see Salesforce Admin Install Guide.

Overview

A MultiLine administrator in the Management Portal needs to complete these steps to set up Salesforce Connector. To complete integration, some steps will require actions from the Salesforce Administrator.

Before you start

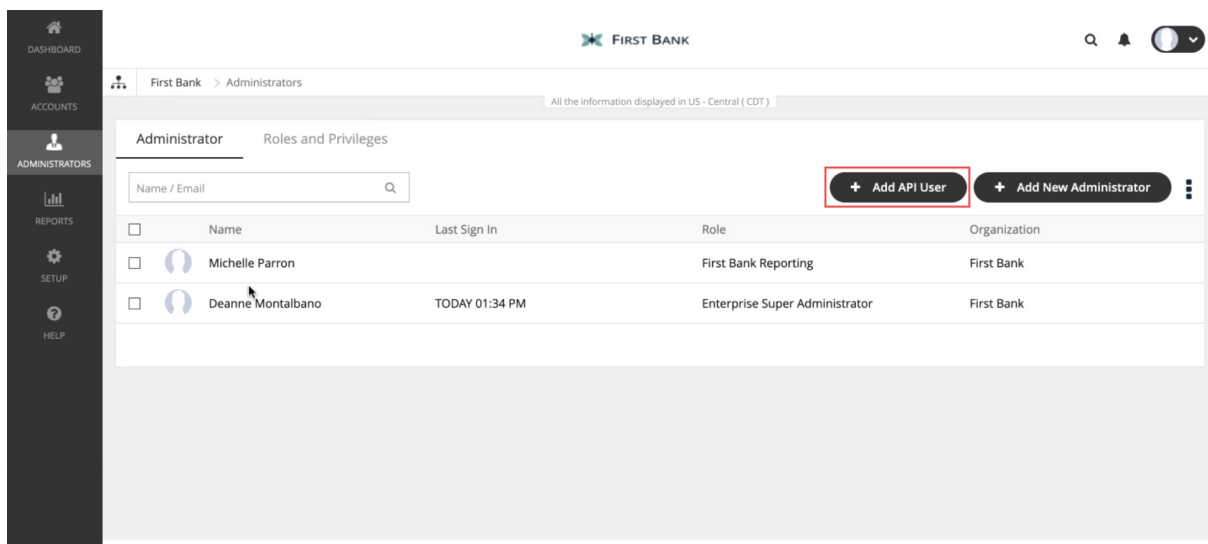
- If possible, perform these steps before adding MultiLine for Salesforce users to the organization.
- An admin must have "Administrators" Role in the organization to do these instructions.
See *What Admin Roles are in the Management Portal*.

Salesforce Connector Installation

Step 1 - Add the Salesforce Administrator as an API user

Use this section to summarize what users will complete in the following steps.

1. Go to Administrators and click Add API User



2. Enter the required details for the **Salesforce Administrator**
Note: Email address must not be associated with an active MultiLine administrator account
3. From the **External Applications** dropdown select **Salesforce**
4. Click **Save**
5. An email will be sent to your Salesforce Administrator's email entered above containing a temporary password

Salesforce Administrator Action Needed

Before proceeding, the Salesforce Administrator must complete the following steps:

- [Getting Started in Salesforce](#)
- [Install MultiLine for Salesforce](#)
- [Register MultiLine](#)
- [Configure MultiLine for Salesforce](#)

Once the Salesforce Administrator actions are complete, you can proceed.

Step 2 - Create User Permissions for MultiLine for Salesforce

Name User Permission MultiLine for Salesforce. ??

Step 3 - Manage Webhook Events

1. Go to **Setup** and click **Webhook Events**.
2. For every Webhook events displayed, click **Edit**.
3. Under **User Permissions** select **MultiLine for Salesforce** and click **Save**.

Step 4 - Manage MultiLine for Salesforce Users

Now you need to apply the user permissions you created to the user accounts.

Select the tab below according to whether the users that are using MultiLine for Salesforce are already MultiLine users, or are new users that need to be invited.

For existing MultiLine users

1. Navigate to the organization where MultiLine for Salesforce users are provisioned
2. Click **Edit** for the user
3. Check that the email address is same as their SFDC account.
4. Click **User Permissions**
5. Select **MultiLine for Salesforce** from the dropdown and click **Save**

For new MultiLine users

1. Navigate to the organization where your MultiLine for Salesforce users will be.
2. Go to **Accounts** and click **Add Account**.
3. Enter the required details. *Note: their email address needs to match their Salesforce email address and must be a valid email address.*
4. Click **Assign Number**, enter SFDC in the search bar and select a number from the list. *Note: MultiLine for Salesforce numbers are tagged in the system as SFDC*
5. Under **User Permissions** select **MultiLine for Salesforce**.
6. Click **Invite**.

Salesforce Administrator Action Needed

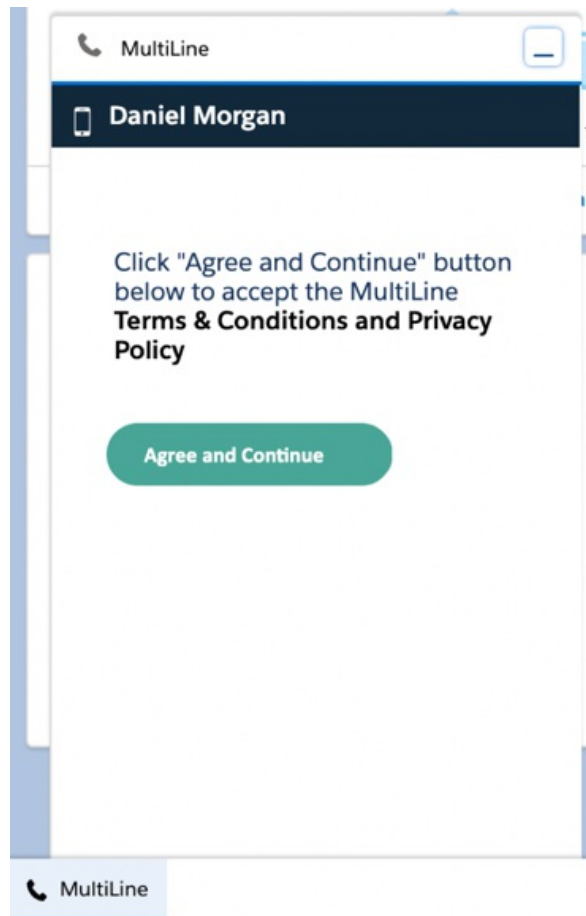
To complete the MultiLine for Salesforce Integration, the Salesforce Administrator needs to complete these steps:

[Manage Licenses and Setup Users](#)

Congratulations!

Once the Salesforce Administrator actions are complete, the integration is finished! When Salesforce users login into Salesforce, they'll see the **MultiLine** utility in the bottom left bar.

After accepting the terms and conditions, they'll be able to use MultiLine.



Note:

1. If their MultiLine number is not assigned to their MultiLine account, then the Salesforce Users will get "MultiLine Registration Failed" error when MultiLine for Salesforce utility is accessed.
2. MultiLine for Salesforce is supported on Chrome browser only

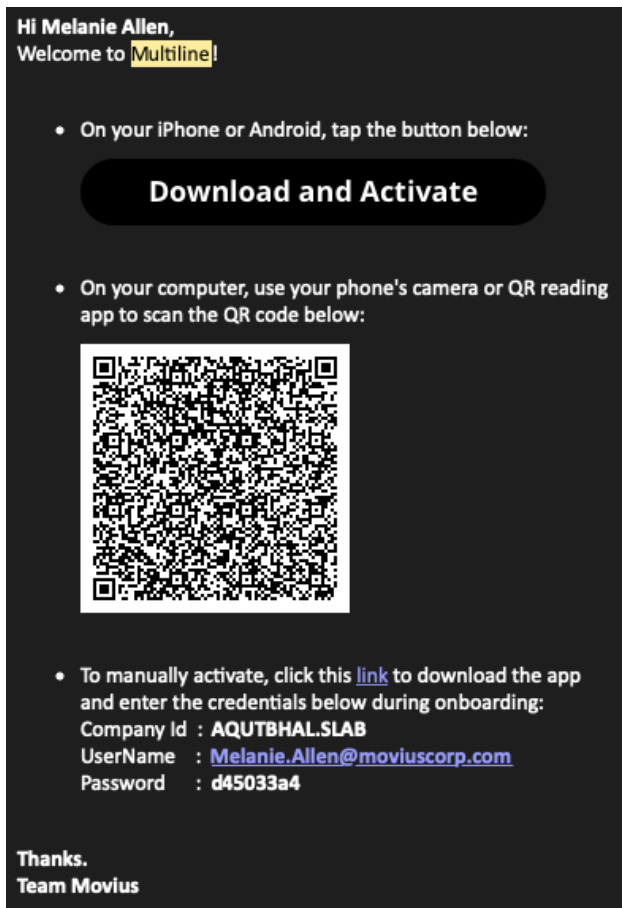
How to update invitations for simplified onboarding

Last Modified on 11/03/2021 7:32 pm EDT

MultiLine email and message invitations have been updated to offer a streamlined experience. Email invitations can now include a user-friendly "Download and Activate" button and QR Code. This new onboarding experience makes it easy for users to find and download the app and doesn't require them to manually enter their credentials.

About the new features for email invitations

- If users have opened the invitation on their phones, they can tap the "Download and Activate" button to automatically download the app and begin activation.
- If users have opened the email invitation using a desktop or tablet, they can use their phone's camera to scan a QR code from an invitation accessed from desktop to automatically download the app and begin activation.
- During activation, they'll only need to enter their personal mobile number, and their one-time PIN will be automatically detected.



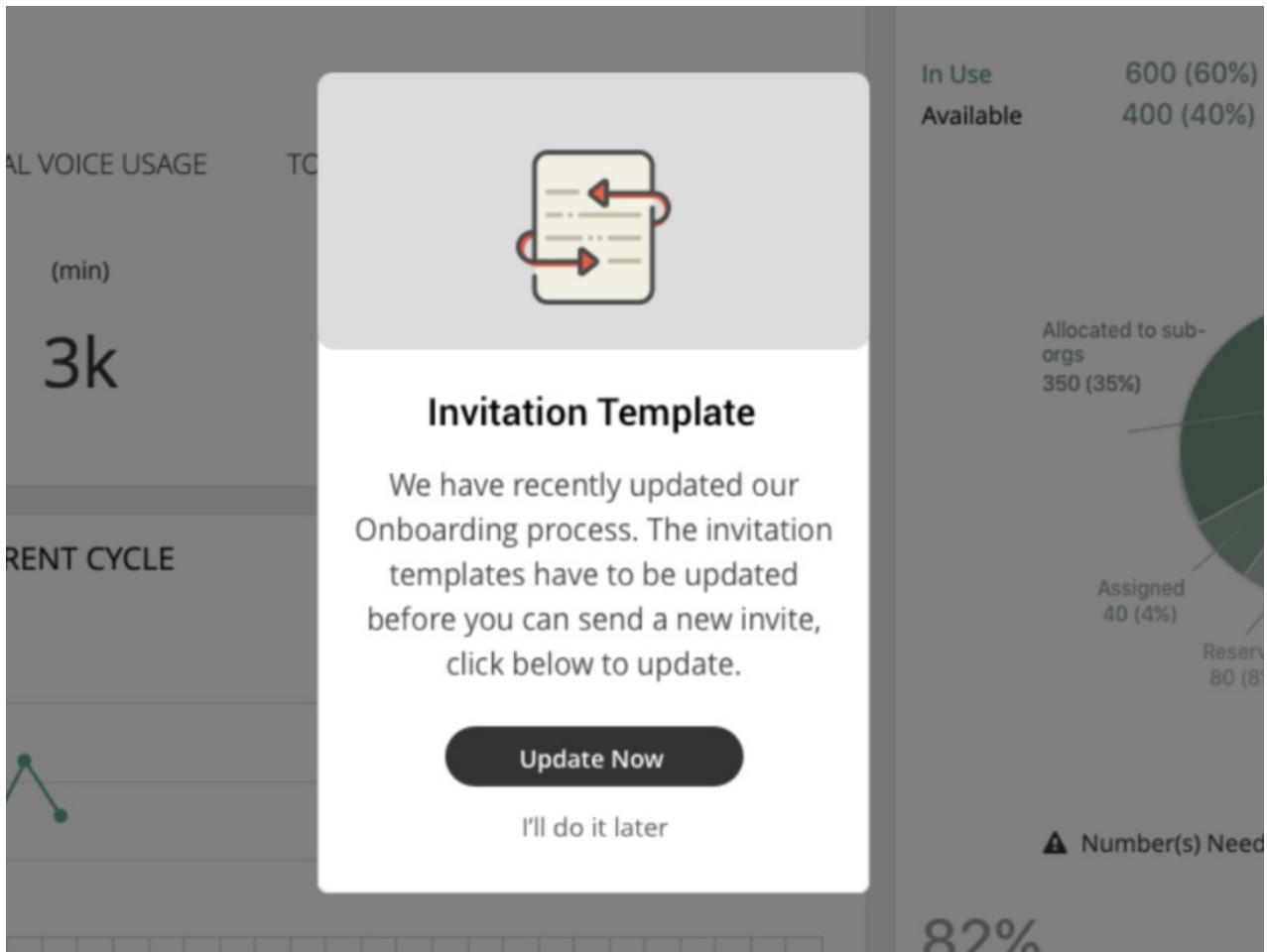
See [Get your invitation and Activate MultiLine](#) for more information on the user experience of the updated invitations.

Updating customized email invitations

There's no action needed for organizations using the default template; these are automatically updated.

When your organization decides to use this feature, Movius will enable it. An admin with email invitation update privileges must update customized email invitations before any new ones can be sent. These admins will be prompted to update invitations the next time they log in, or before trying to resend invitations or send new invitations.

- Clicking **Update Now** will redirect the admin to the **Invitation Templates** screen.



Sample email invitation text will be provided in the **Sample Template**.

1. Click **Edit**.

Email Template

Email Preview Template Edit

From: auto@moviuscorp.com

Subject: MultiLine_Invitation

Content:

B I U [List Icons] [Image Icon] [Link Icon] [Font Size...] [Font Family] [Font Format]

{logo_img}

Hi {f_name} {l_name},

2. Click the down arrow for **Sample Template**.

Email Template

Email Preview Template Cancel Save

Sample template >

New variables include:

Variable Name	Description	Required?
{qr_code_img}	This is the QR code. Users scan the QR code to automatically download the app (if not already downloaded) and begin activation.	Yes
{sign_in_btn}	This is the "Download and Activate" button. Users tap the button to automatically download the app (if not already downloaded) and begin activation.	No

Admins: Customize the invitation

You can customize the invitation templates under Administration in the Setup tab...

Updating customized SMS invitations

If your organization sends invitations by text message, you'll need to update this template to include the new required variable {sign_in_link}.

The **Sample template** has been updated for use.

1. Click **Edit**.

Message Template

Message Preview Template Edit

From: 12567335166

Content: Hi {f_name} {l_name},
Welcome to MultiLine!

2. Click the down arrow for the **Sample template**.

Message Template

Message Preview Template Cancel Save

Sample template ▾

Hi {f_name} {l_name}, Welcome to MultiLine! To get started, please click on the sign in link {sign_in_link}

=====

{f_name}: First name of the invited user.
 {l_name}: Last name of the invited user.
 {sign_in_link}: Tapping on this link will help the user to onboard.

Admins: Customize SMS invitations

When you add users in MultiLine, you can invite them to join by sending an SMS. G...

FAQ

Q: How do I enable this feature in the MMP?

A: Movius will enable the feature for you. It will automatically be enabled for the entire organization and all sub-organizations.

Q: What does the update mean for users that have already been invited?

A: Existing users can continue using the app without interruption. If they uninstall and reinstall the app, or need to install the app on a new phone, will they need to activate again. An admin can send them a new invitation, or they can still use their old credentials and activate manually.

How to onboard users for MultiLine Desktop

Last Modified on 11/03/2021 7:52 pm EDT

We're excited to invite your organization to the MultiLine Desktop experience.

About MultiLine Desktop

MultiLine Desktop brings the mobile business calling and messaging features critical to your organization's frontline communications the browser.

For regulated users, these calls and messages are captured for compliance teams in the Management Portal just as they are in the mobile apps. Users can sync with your Office 365 Exchange Contacts, or build a local contact list. 1:1 messaging and calling is supported. Manage Availability and Call Handling settings can only be set in the mobile app, but will apply for the desktop.

MultiLine Desktop is compatible with the following browsers:

- Chrome 90.0.4430 or above
- Safari 14 or above
- MS Edge 90.0.818.39 or above

Overview

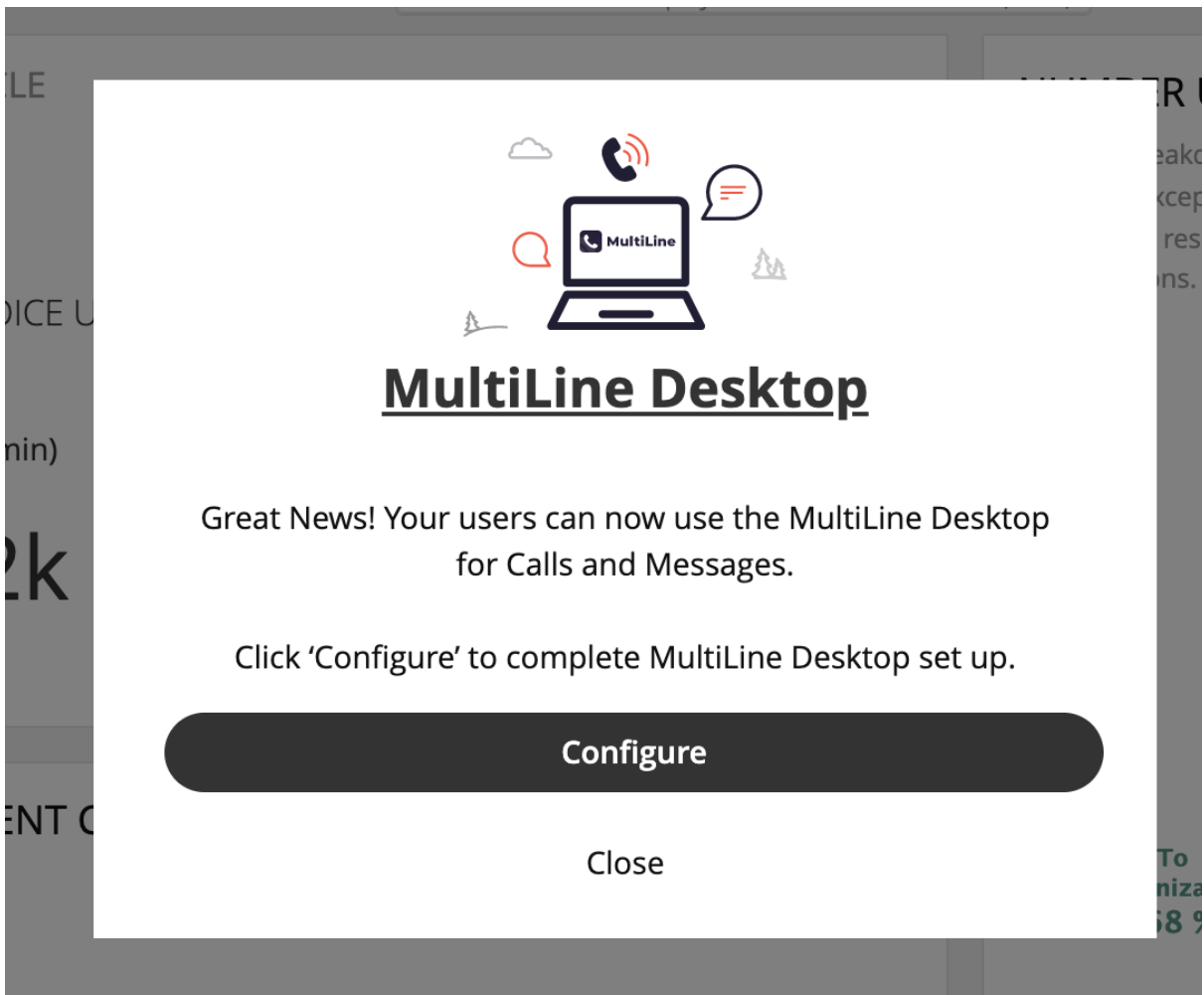
These instructions can be completed by admins with Invite and Setup privileges in the Management Portal for the top level organization. Onboarding requires two steps:

- Step 1: Enable the MultiLine Desktop application
 - If your organization is using a custom email invitation, you'll need to update it
- Step 2: Invite users

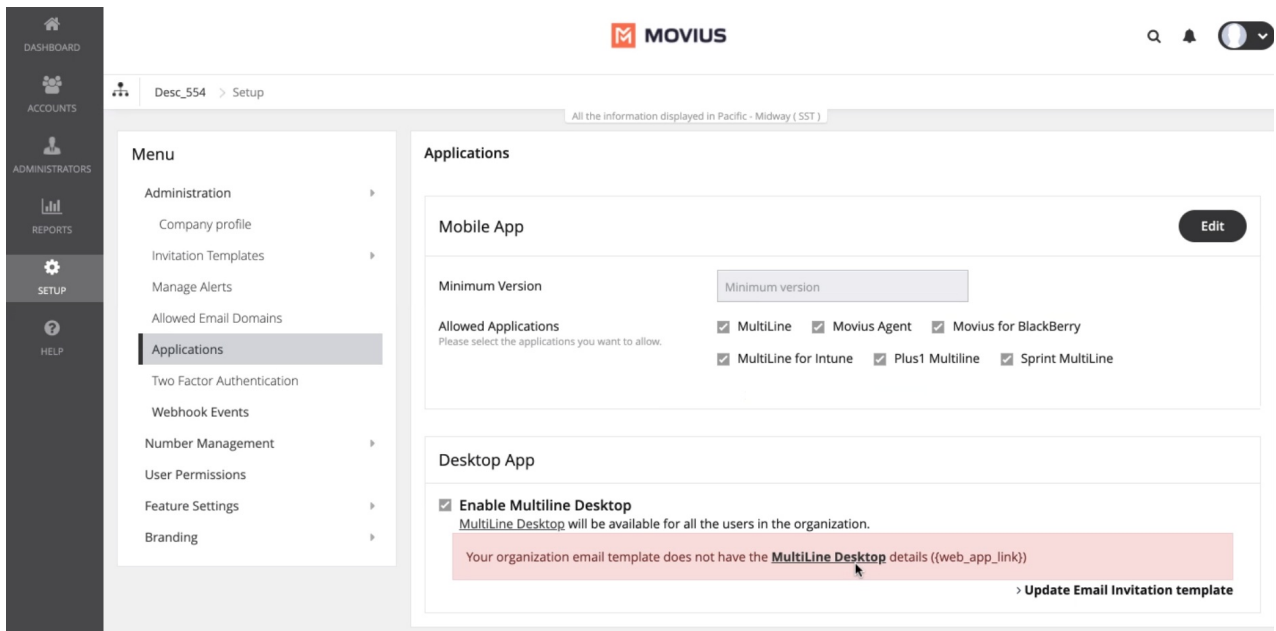
Step 1: Enable MultiLine Desktop

When your organization is able to use MultiLine Desktop, admins will see a pop-up when they log in.

1. Click **Configure** to get started and be redirected to **Setup > Administration > Applications**.



2. Check the box for Enable MultiLine Desktop to enable.

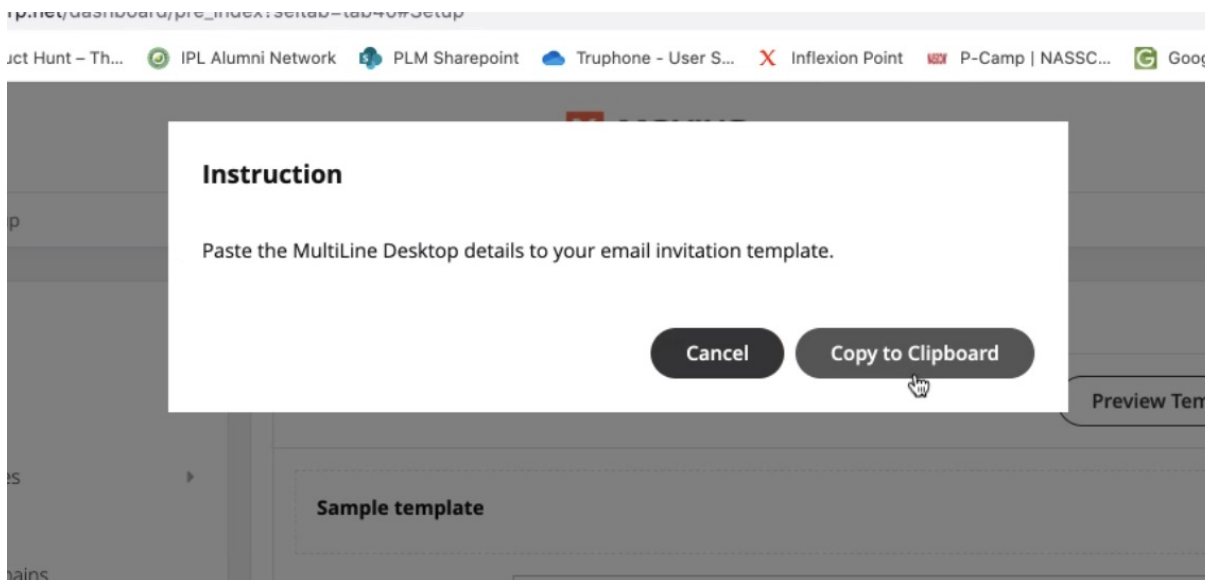


For customers that are using customized email templates, upon enabling, you'll see the notification to update the Email Invitation template if your email invitation template is not updated with the MultiLine Desktop details.

Update the email invitation (for custom email invites only)

You'll only see this prompt if your organization is using a custom email invitation, as we have updated default email invitations automatically.

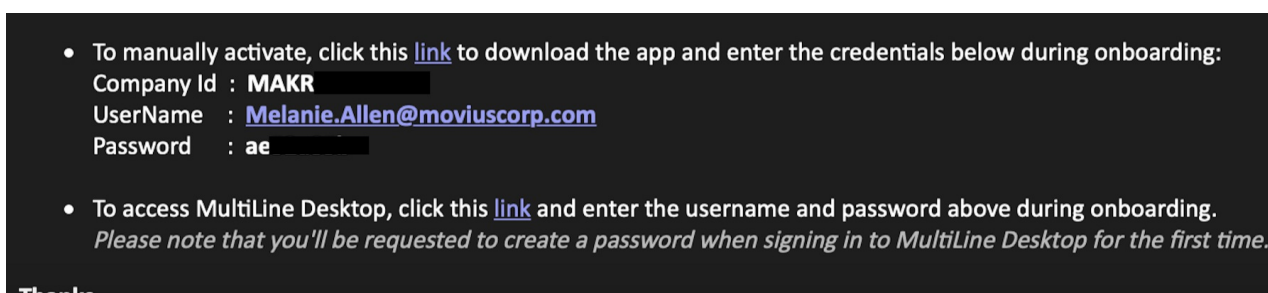
1. Click **Update Email Invitation template**. You'll be redirected to the custom email template screen.
2. Click **Copy to Clipboard**.



3. Paste the content into the invitation and make edits if desired.
4. Click **Edit** to make changes.
5. Click **Preview Template** to see how edits would look and make sure that parameters are working properly.
6. Click **Save**.

Once an admin updates their invitations, other admins will be notified and can view the updated invitation and send to users.

Example invitation with MultiLine Desktop link and instructions added:



Step 2: Invite users

Onboarding new users

For users who have never used the mobile app or desktop app, **invite these users** in the usual fashion after enabling Desktop and updating the invitation, if required. *Note: Only organizations with custom email invitations need to update the invitation manually.* After enabling Desktop, invitations will include activation credentials for Desktop and app.

Onboarding existing users

- You must provide your users the unique MultiLine Desktop URL. If they have their MultiLine invitation, they can use the username and password provided for their first log into MultiLine Desktop.
- Users who have lost their invitation can use **Forgot Password** to reset their password. You only need to **resend invitations** to users that request one, or to new users.
 - *Note: If users do this, they will skip the step to Reset Password during onboarding flow since they just did.*
 - The passwords users set to log into MultiLine Desktop are different from the activation password they need to activate the mobile app. For activating the mobile app, users should continue to use the password from their latest received invitation. If they lose theirs; resend the invitation to provide them the password.
- The username and password for logging in to MultiLine Desktop for the first time is the same as the username and password for activating the mobile app.
- For security reasons, users will be prompted to change the password used for MultiLine Desktop on their first log in. *Note: If they need to reactivate the mobile app in the future, they must use the password provided in their latest invitation, not their MultiLine Desktop password.*

Delete

If your users use Picture Messaging...

Admins: [MultiLine Desktop] Edit Picture Messaging Not Supported Message

You may want to edit the message sent to users when a Picture Message can't be de...

Manage Organizations

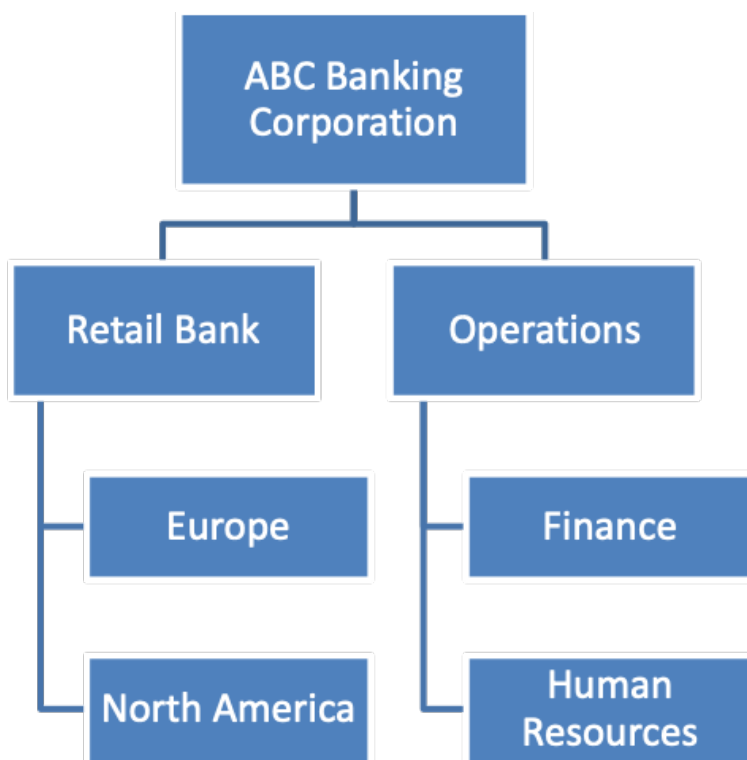
Last Modified on 11/03/2021 7:39 pm EDT

Read on to learn how to create and edit organizations that will contain your user accounts.

Overview

You can set up the MMP to reflect your organizational structure where you can create an organization (root node) with the name of your Enterprise. Each node or a branch of the tree represents a department. Each department can have its own administrator with well-defined roles and privileges.

Consider the example below:



You can create one or multiple organizational levels or just create one organizational level below the root node. This structure is flexible enough to manage your employee base.

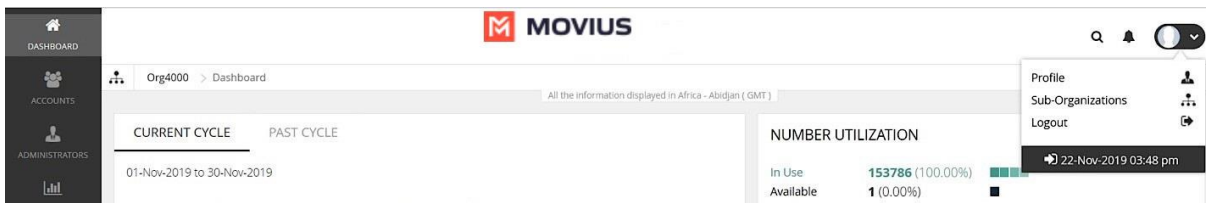
You can have as many organizations and sub-organizations in the portal as needed.

Before you start

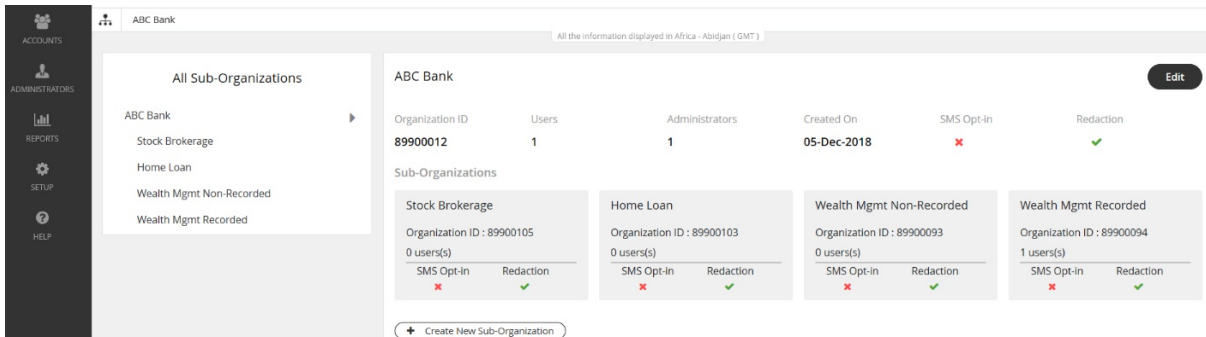
- You need the Profile Role to perform these instructions. See [What Roles are in the Management Portal?](#)

Create Organization

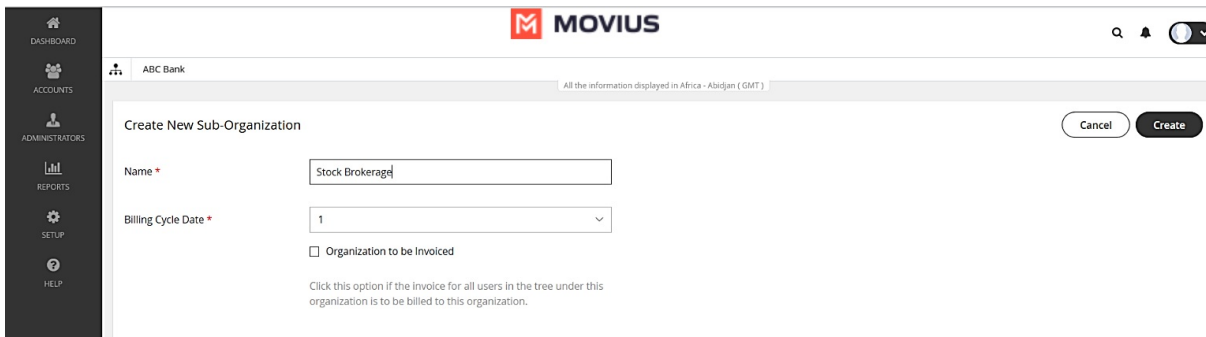
1. Click .
2. Click Sub-Organizations.



3. Click Create New Sub-Organization.



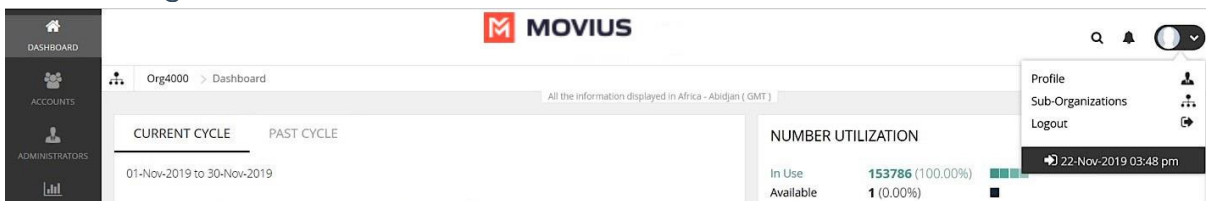
4. Fill out the details



5. Click Create.

Edit Organization

1. Click .
2. Click Sub-Organizations.



3. Click Edit to make changes to the parameters within the organization.

Your organizations are ready!

Now administrators can invite administrators and users to the organization.

Navigate Organizations

Last Modified on 10/25/2021 3:04 pm EDT

Read this to learn how to go to a different organization than you're in.

Overview

Before you perform most tasks in the Management Portal, if you manage multiple organizations, you will need to go to the correct organization before beginning.

Before you start

- Best practice is to set policies at the top-most level where they apply, as policies set at the top-level are inherited by the organizations below.
- You can only go to organizations you have access to.
- If you only have access to one organization, you won't need to use this instruction.

Go to organization

1. Click the organization icon on the left side of the header bar.
 2. Select sub-organizations to reveal their sub-organizations until you find the desired sub-organization.
 3. Click **Apply**.
-

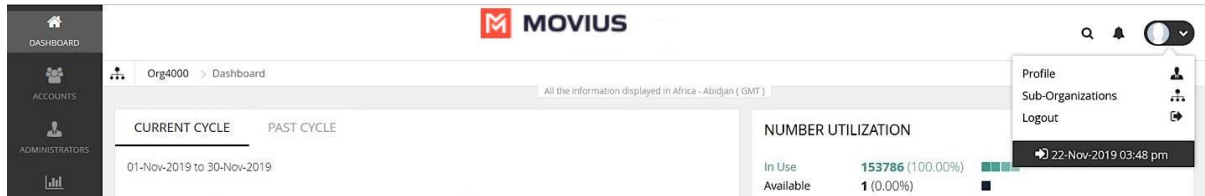
Edit Administrator profile

Last Modified on 10/19/2021 3:22 pm EDT

Your profile is a record of your information as an administrator of this organization. You can edit your profile by adding new information such as your Profile Photo, Address, Time zone, etc.

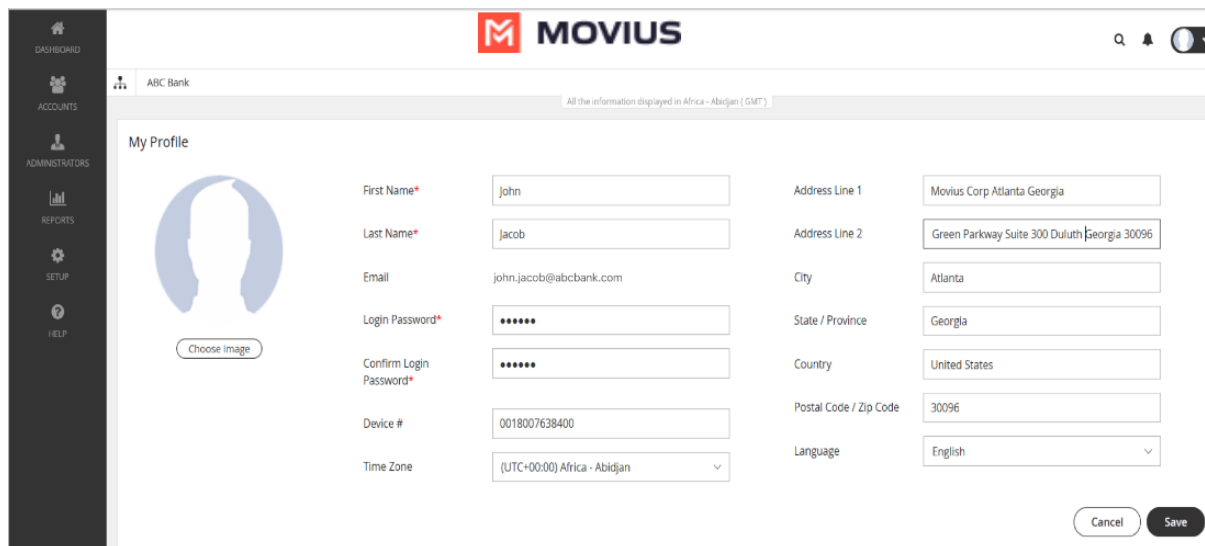
How to edit your administrator Profile

1. Click  .
2. Click Profile.



The screenshot shows the MOVIOUS dashboard interface. On the left is a navigation sidebar with icons for Dashboard, Accounts, Administrators, Reports, Setup, and Help. The main content area displays the dashboard for 'Org4000'. A dropdown menu is open, showing options for Profile, Sub-Organizations, and Logout. The profile option is highlighted. The dashboard also shows a 'NUMBER UTILIZATION' section with 'In Use' at 153786 (100.00%) and 'Available' at 1 (0.00%).

3. Fill out the details and click Save.



The screenshot shows the 'My Profile' form in the MOVIOUS system. The form is for 'ABC Bank' and contains the following fields:


- Profile Photo: A placeholder image with a 'Choose image' button.
- First Name*: John
- Last Name*: Jacob
- Email: john.jacob@abcbank.com
- Login Password*: [Redacted]
- Confirm Login Password*: [Redacted]
- Device #: 0018007638400
- Time Zone: (UTC+00:00) Africa - Abidjan
- Address Line 1: Movius Corp Atlanta Georgia
- Address Line 2: Green Parkway Suite 300 Duluth Georgia 30096
- City: Atlanta
- State / Province: Georgia
- Country: United States
- Postal Code / Zip Code: 30096
- Language: English

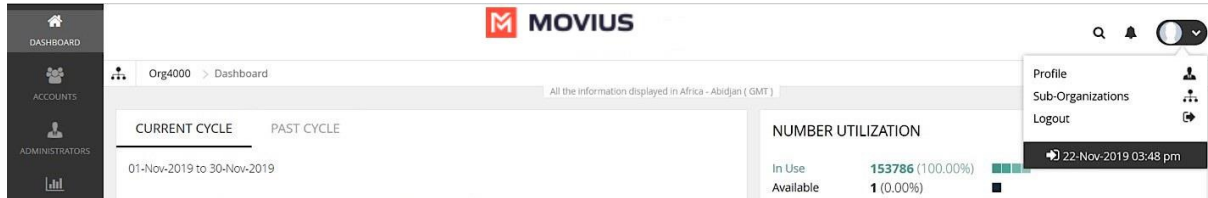
At the bottom right of the form are 'Cancel' and 'Save' buttons.

Log out of Management Portal

Last Modified on 10/25/2021 3:08 pm EDT

Log out of the Management Portal from the Profile menu.

1. Click 
2. Click **Profile**, then click Logout



Customize the mobile app

Last Modified on 11/03/2021 7:40 pm EDT

Read on to learn how to add your Enterprise branding to the MultiLine app.

Overview

You can edit your Enterprise's **Mobile App look and feel** under **Branding** in the **Setup** tab. You can customize:

- App Theme: Add logo and branding colors
- About Us screen: Add logo and social accounts
- FAQ screen: Add your own questions and answers with information your MultiLine users may need
- Customer Care screen: Add your IT team's phone number and email address so that user's can get help from you

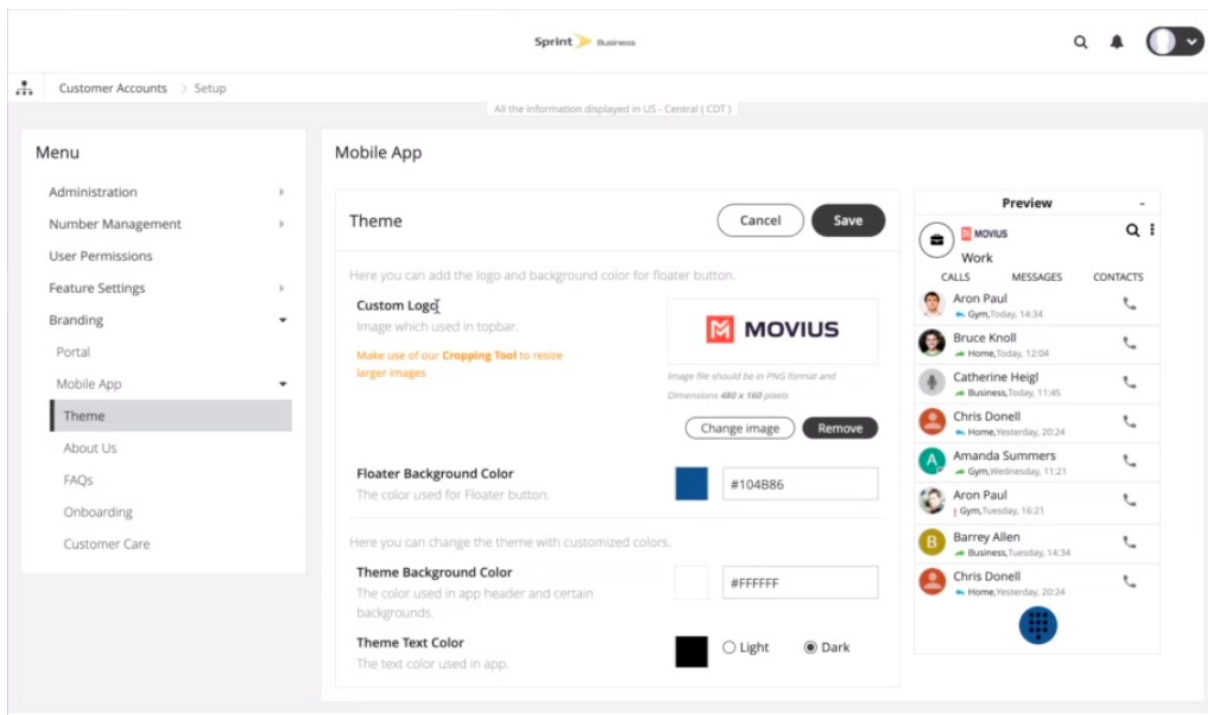
Before you start

- An admin must have "Setup" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal*.

Customize theme

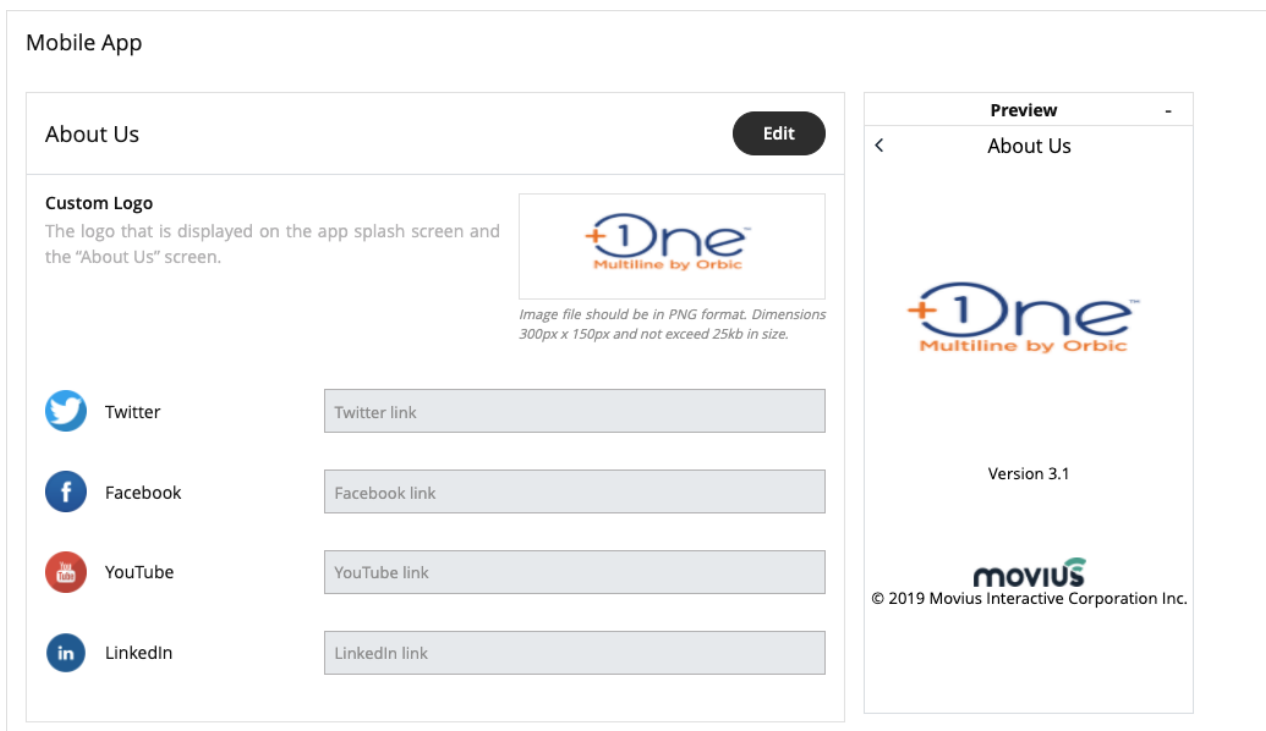
To edit your Mobile App Theme, customize the parameters of the following settings:

- Theme Background Color
 - Customizes the background color of the app screens
- Floater Background Color
 - Customizes the background color of the dialpad floater
- Theme Text Color
 - Customizes the color of the text/dialpad floater's 'digits'
- Custom Logo
 - Must be 480 x 160 pixels. If your logo is larger than 480 x 160 pixels, you will be prompted to use the in-app image cropper to fit the logo to size. If you logo is below 480 x 160 pixels, you will be prompted to select a larger image.
-



Customize About Us screen

To customize your About Us Page, edit the parameters of the About Us tab under Branding.



- Logo must be 300 x 150 pixels.
- If your logo is larger than 300 x 150 pixels, you will be prompted to use the in-app image cropper to fit the logo to size.
- If you logo is below 300 x 150 pixels, you will be prompted to select a larger image.
- File cannot be larger than 25kb.

Customize FAQ screen

Edit questions or answers

1. Edit the default 'fill-ins' for both the Question, and the Answer fields of the questions you would like to change under the FAQs page under **Branding**.
2. Click the + icon next to a question to view its respective answer.

Add questions

1. Click the ovular **ADD** button on the top right.
2. Toggle the **Language** and **Device OS** to identify the fields you want to edit.
You can see a **Preview** of the screen on the right of the MMP.

Mobile App

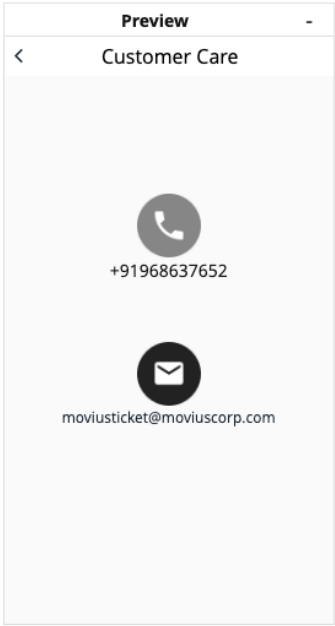
The screenshot displays the 'Mobile App' interface for editing FAQs. On the left, the 'FAQs' section features a list of six questions, each with a plus sign to its left. Above the list are two dropdown menus: 'Select Language' (set to 'English') and 'Device' (set to 'Android'). A black 'Add' button is located in the top right corner of this section. On the right, a 'Preview' window shows a mobile app screen with the same six questions. The first question, 'What is my Movius number?', is expanded to show its answer: 'You can see the Movius Number on the main page of the application settings. If you have more than one number allocated, all numbers will be listed there.' The other five questions are collapsed, showing only their text and a right-pointing arrow.

Customize Customer Care screen

To customize your Customer Care Page, edit the contact information in the Customer Care tab under **Branding**.

Mobile App

Customer Care Edit	
Customer Care Phone Number(s) <small>(Comma seperated)</small>	+91968637652
Customer Care Email Address	moviusticket@moviuscorp.com
Call Progress Brand Text	Movius



What Admin Roles are in Management Portal?

Last Modified on 10/19/2021 2:26 pm EDT

When using this help center, you may see instructions that tell you you require a specific "Role". Below are a list of all the Roles which exist in the Management Portal.

List of Admin Roles

Role	Description
Accounts	This privilege allows an administrator to View user accounts; Invite new users; Edit and Move and Delete existing accounts.
Administrators	This privilege allows an administrator to View all other Administrators; Create new Administrator IDs; Edit existing information for other Administrators or Delete an existing Administrator ID.
API Users	This privilege allows an administrator to View user accounts; Create new API users; Edit and Delete existing API users.
Reports	<p>This privilege contains three main categories such as View, Download and ADK APIs</p> <p>Options under ADK APIs</p> <ul style="list-style-type: none"> • Call recording shows the recorded calls. • Message logging shows the recorded messages. • SMS Opt-In <p>Options applicable for View & Download</p> <ul style="list-style-type: none"> • Consumption Metrics – are usage charts summarized for that organization. • User Metrics – is a summary of usage across users in that organization. • Administrator Activity – shows the Administrator's activities on the portal. • Activities – are the detailed records (Movius CDRs) around the activity. As this is highly sensitive data, only authorized users should have access to this privilege. • Call recording shows the recorded calls. • Message logging shows the recorded messages. • SMS Opt-In
	<p>This section grants the following admin permissions:</p> <p>Edit permissions:</p> <ul style="list-style-type: none"> • Company Profile – Provides Company details. • Invitation Templates – Provides options for SMS and Email Invitation templates. • Manage Alerts – Provides options for the Alerts to Administrators. • Domain Restriction – Provides the ability to restrict invitation access to

Role	Description
Setup	<ul style="list-style-type: none"> • Application Version – Provides details about the MultiLine application. • Two Factor Authentication – Provides an additional layer of security to control suspicious login activity. • Webhook Events • Number Management – Provides the options for managing the numbers allocated to an organization. • User Permissions – Provides the ability to define features available on the application. • Feature Settings – Mobile Recording (Call Recording & Message Logging) – Provides options around Mobile Recording. • Messages – Synchronization & Multimedia Messages. • SMS Opt-In – Allows access to the Call and SMS recordings using the ADK. • In-App Messaging • Branding – Portal & Mobile App. <p>View Permissions</p> <ul style="list-style-type: none"> • Company Profile – Provides Company details. • Invitation Templates – Provides options for SMS and Email Invitation templates. • Manage Alerts – Provides options for the Alerts to Administrators. • Domain Restriction – Provides the ability to restrict invitation access to domains. • Application Version – Provides details about the MultiLine application. • Two Factor Authentication – Provides an additional layer of security to control suspicious login activity. • Webhook Events • Number Management – Provides the options for managing the numbers allocated to an organization. • User Permissions – Provides the ability to define features available on the application. • Feature Settings – Manage Recording (Call Recording & Message Logging) - Provides options around Mobile Recording. • Messages – Synchronization & Multimedia Messages. • SMS Opt-In - Allows access to the Call and SMS recordings using the ADK. • In-App Messaging
Roles and Privileges	<p>This section grants the following admin permissions:</p> <ul style="list-style-type: none"> • View all the roles; • Create a new role; • Edit an existing role; • Delete an existing role.
Help	<p>This grants permissions to admins to View or Edit contents in the Help section.</p>
	<p>This section grants the following admin permissions:</p>

Role	Description
Profile	<p data-bbox="357 154 1091 192">View Administration Profiles and Sub-Organizations</p> <ul data-bbox="389 192 1091 304" style="list-style-type: none"><li data-bbox="389 192 1091 230">• Edit Administration Profiles and Sub-Organizations<li data-bbox="389 230 1091 268">• Create Sub-Organization<li data-bbox="389 268 1091 304">• Delete Sub-Organizations

Create Admin Roles in Management Portal

Last Modified on 11/03/2021 7:40 pm EDT

Roles are a collection of privileges granted to Admins. Create your Roles before adding admins because selecting the Role will be a part of the Admin creation process.

Overview

Creating Admin Roles allows your organization to have different types of Admins. For example, you can have an Admin who is only able to invite users, and an administrator who is only able to downloading reports.

Before you Start

- You need "Roles and Privileges" Role to perform these instructions.

How to create a Role

You can create a role in Administrators > Roles and privileges.

1. Enter the **Organization** where you want to create the role.
2. Click **Administrators**.
3. Click **Roles and Privileges**.
4. Click + **Create Role** to create a new role.

Different privileges can be assigned by checking various features under each section.

- Select the checkbox to assign the privileges.
- If single or multiple checkboxes of a section are selected, the link for that section will get highlighted in the header link.

Your custom Admin Roles are ready!

Now when you add Administrators accounts, they will join with the access they need to perform their role in the Management Portal.

Invite Administrators to Management Portal

Last Modified on 11/03/2021 7:40 pm EDT

Learn how to add, delete or edit an admin profile in the Administrator section of Management Portal.

Overview

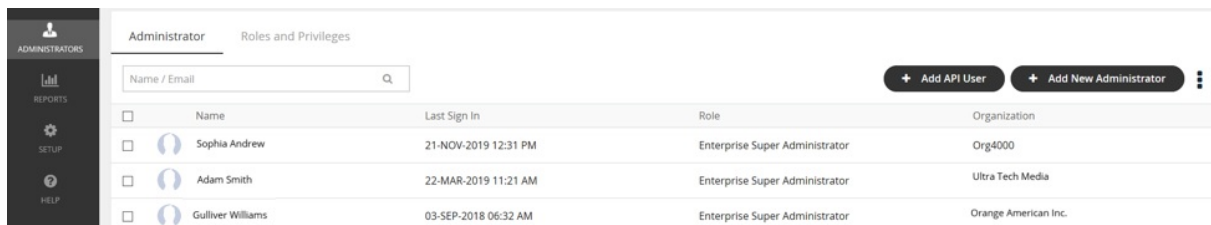
Admin accounts allows people in your organization to access the Management Portal.

Before you Start

- Requires Roles and Privileges Role. See [Admin Roles](#) for more information.
- Before you invite administrators to the organization, you should have already [created Roles for the administrators](#).

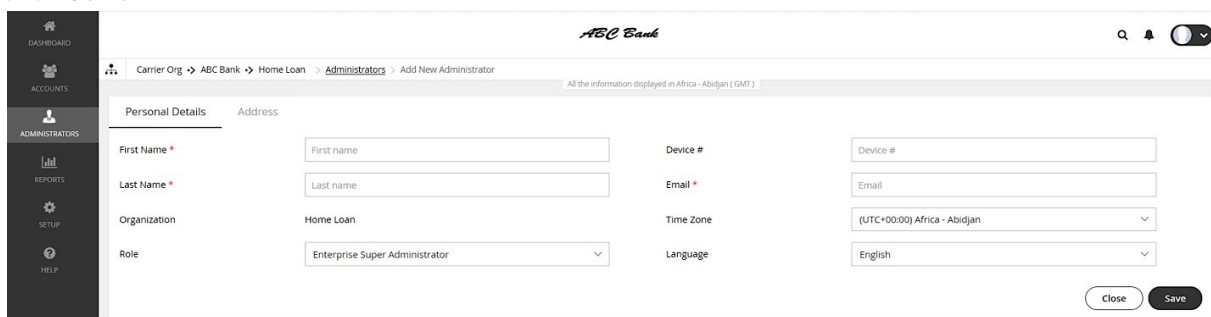
Invite admins

1. [Go to the organization](#) where you want to perform the action.
2. Click Administrator.
3. Click Add New Administrator.



<input type="checkbox"/>	Name	Last Sign In	Role	Organization
<input type="checkbox"/>	Sophia Andrew	21-NOV-2019 12:31 PM	Enterprise Super Administrator	Org4000
<input type="checkbox"/>	Adam Smith	22-MAR-2019 11:21 AM	Enterprise Super Administrator	Ultra Tech Media
<input type="checkbox"/>	Gulliver Williams	03-SEP-2018 06:32 AM	Enterprise Super Administrator	Orange American Inc.

4. Enter the details for a new administrator.
 - *Note that the default language is English but can be modified by the administrator when they review their own profile. Movius currently supports English, Spanish, and Portuguese languages.*
5. Click Save.



ABC Bank

Carrier Org → ABC Bank → Home Loan → Administrators → Add New Administrator

All the information displayed in Africa - Abidjan (GMT)

Personal Details	Address
First Name *	Device #
Last Name *	Email *
Organization	Time Zone
Role	Language

Close Save

You've invited the admins!

An email will be sent to the new admins which will contain their login credentials and a system-generated password. On the first login, the administrator will be prompted to set their own password.

If you want to check whether administrators have onboarded, you can monitor administrator status

in Administrator Reports.

Connect MultiLine to an external application via API user

Last Modified on 11/03/2021 7:40 pm EDT

You can connect MultiLine to an external application (example: Salesforce) by adding an API user.

Overview

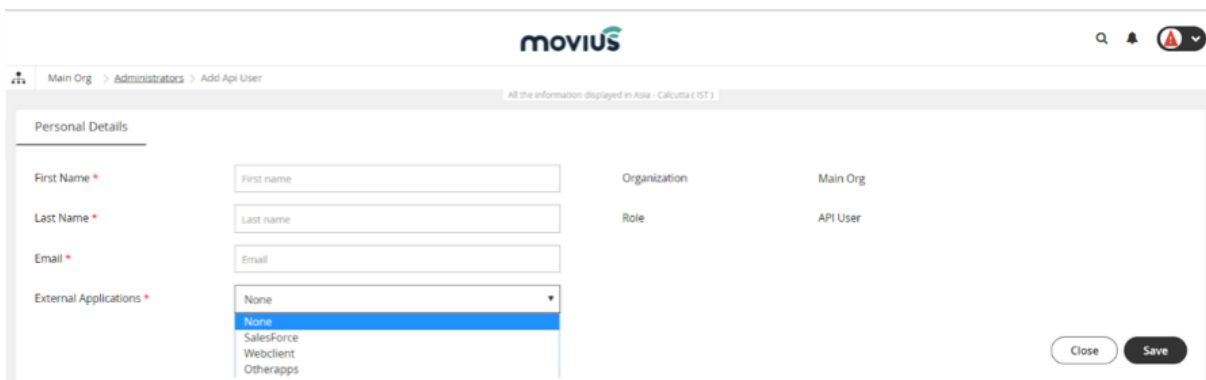
When the API user is created, the user can select an External Application using his account credentials.

Before you Start

- You need the "API User" Role to do this instruction. See [What Admin Roles are in Management Portal?](#)

Create an API user

- Click Administrators.
- Click Add API User.



The screenshot shows the 'Add API User' form in the Movius system. The form is titled 'Personal Details' and contains the following fields:

Field	Value
First Name *	First name
Last Name *	Last name
Email *	Email
External Applications *	None (dropdown menu open showing: None, Salesforce, Webclient, Otherapps)
Organization	Main Org
Role	API User

Buttons: Close, Save

- Enter the Personal Details.
- Select External Applications for which the API user will be accessing the organization data.
- Click Save.

Editing an External Application

An API user has the privilege to edit the selected External Application. To edit an External Application, follow the steps below:

- Click Administrators.
- Click Edit Administrators.
- Edit the Email Address.
- Select External Applications for which the API user will be accessing the organization data.
- Click Save.

Resend invitations to Management Portal Administrators

Last Modified on 10/25/2021 2:33 pm EDT

If an administrator loses their invitation to the Management Portal, you can resend the invitation.

Overview

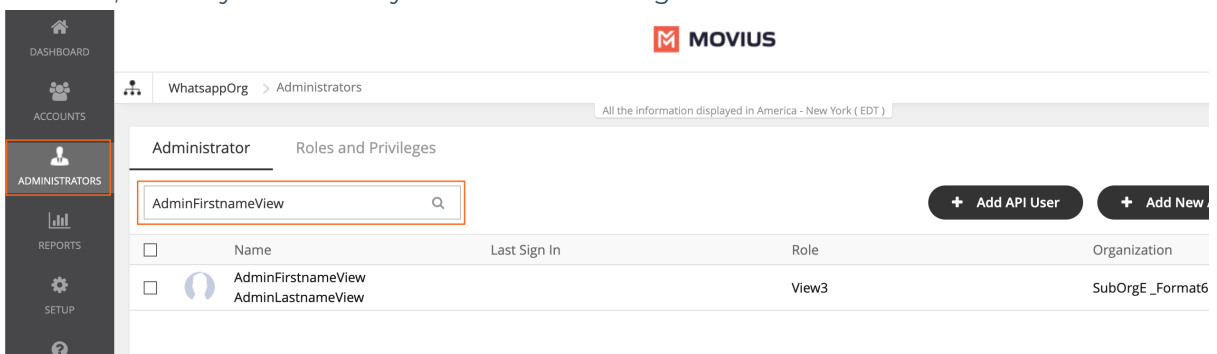
Invitations to administrators contain the information they need to activate their account into the Management Portal for the first time.

Before You Start

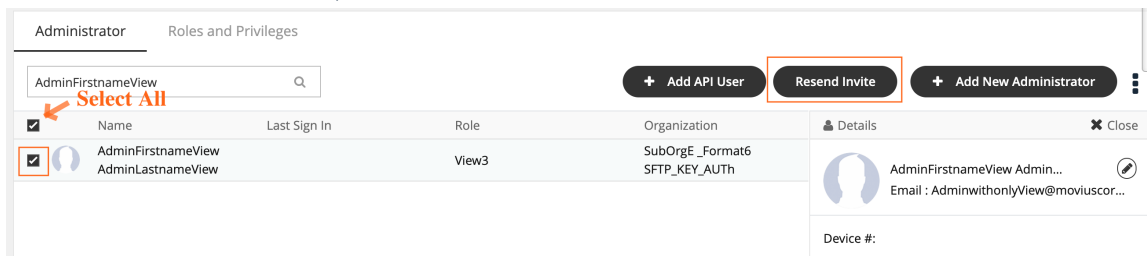
- An admin must have "Administrators" Role in the organization to do these instructions.
See [What Admin Roles are in the Management Portal](#).

How to resend invite to one or more administrators

1. Go to Administrators.
2. If desired, narrow your search by name or email using the search bar.



3. Select the checkbox for the administrators you want to re-invite.
 - To select all administrators, use the checkbox in the header row.



4. Click Re-invite.

After re-inviting administrators, a download link with successful invitation message will appear. Click on the **Download invitation status** link to view the invitation status.

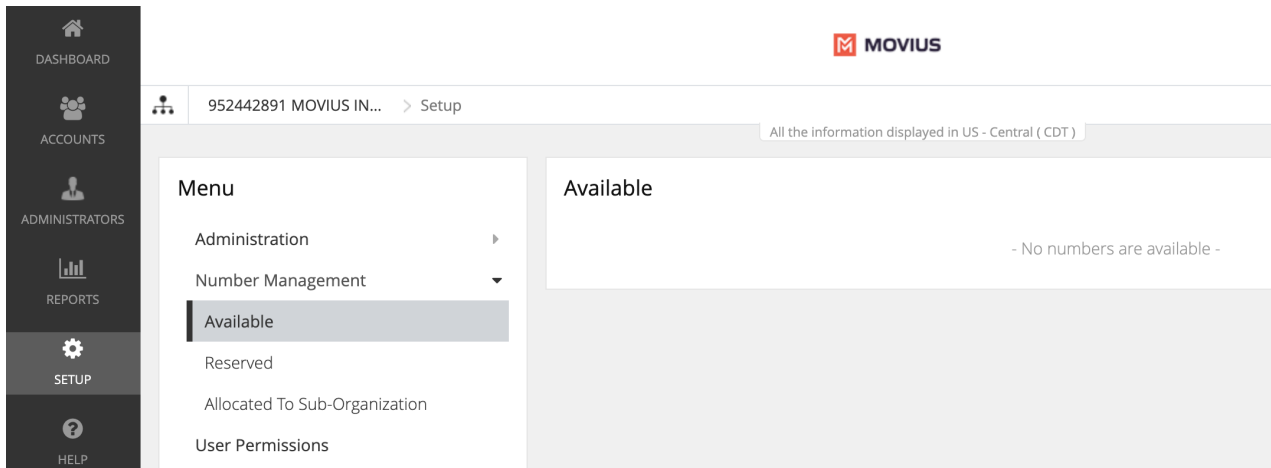
Number Management

Last Modified on 09/10/2021 11:02 am EDT

The **Number Management** section under the **Setup** tab has utilities for managing numbers.

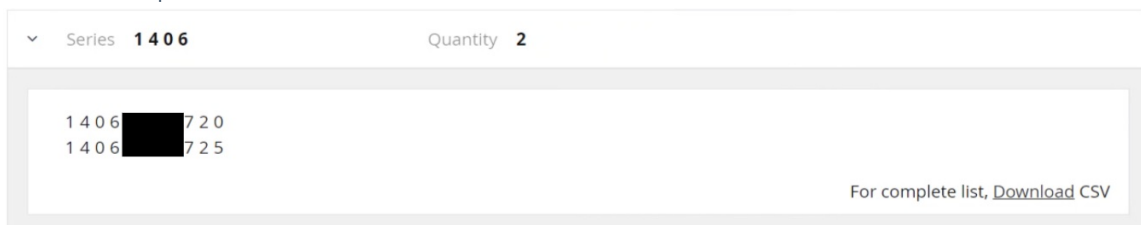
Tasks you can perform include:

- Allocate number(s) to a department or sub-organization.
- Reserve a number for an individual or a role with a Tag.
- View numbers allocated to a department/sub-organization and withdraw unused number(s).



Available

- Available numbers are numbers which are not yet used, reserved, or allocated to any organization.
- Series collect numbers by country code or area code. This is configured in the Service portal.
 - Click the dropdown menu to see the list of available numbers



- You can search any number series in the search bar to narrow your results



- You can allocate numbers from this screen by clicking **Allocate Number**.
 - You'll select the **Series**, the **Quantity** of numbers to allocate, and the **Sub Organization**, then click **OK**.

Available

Available Numbers : 3

Search 1406

Allocate Number

Series

1406

Quantity

2

Sub Organization


WebRTC

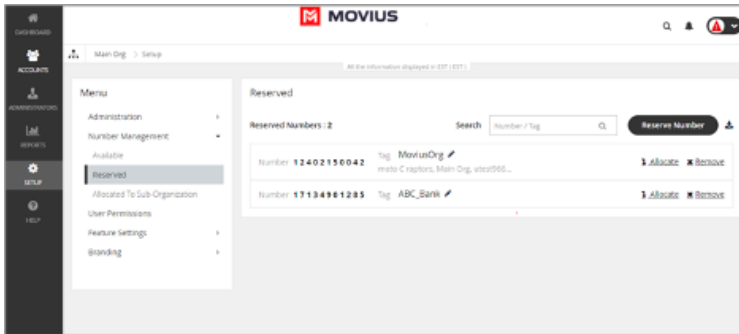
Cancel

OK

Reserved

You can reserve specific numbers for an individual or a role.

- To reserve a number, search for the number you wish to reserve from the list of available numbers.
- You can key in the first few numbers to narrow down the search.
- Click next to the existing Tag and click  to allocate a new tag.



- You can also allocate that reserved number to a specific department/sub-organization.

Allocated to Sub-Organization

A number that is allocated to a sub-organization can only be used by that sub-organization or child organization.

This tab allows you to see a department/sub-organization and the count of numbers allocated to it.



How to withdraw an unused number

Withdrawing a number will remove it from being allocated to that Sub-Organization and moves it to the immediate parent organization. You can only withdraw unused numbers.

1. Click on the organization to expand it and view the allocated number series.

Menu

- Administration
- Number Management
- Available
- Reserved
- Allocated To Sub-Organization**
- User Permissions
- Feature Settings
- Branding

Allocated to Sub-Organization

Allocated Numbers : 153674

Digital Safe UK3			5 Numbers Allocated
Series 1 2 5 6	Allocated 4	Unused 1	1 Withdraw Numbers
Series 2 3	Allocated 1	Unused 0	
sowmya_suborg			- SHARED -
Non Multiline org			- SHARED -
Customers			94694 Numbers Allocated

2. Click **Withdraw Numbers**.

3. A message window pops up as below:

Withdraw Numbers

Unused numbers **1**

Enter quantity to withdraw :

Cancel Proceed

4. Enter the quantity to be withdrawn.

5. Click **Proceed**. *Note: the quantity should not be greater than the Allocated Numbers.*

A confirmation notification appears as below:

1 number from series 1256 has been successfully withdrawn from Digital Safe UK3 organization ✕

Allocated to Sub-Organization

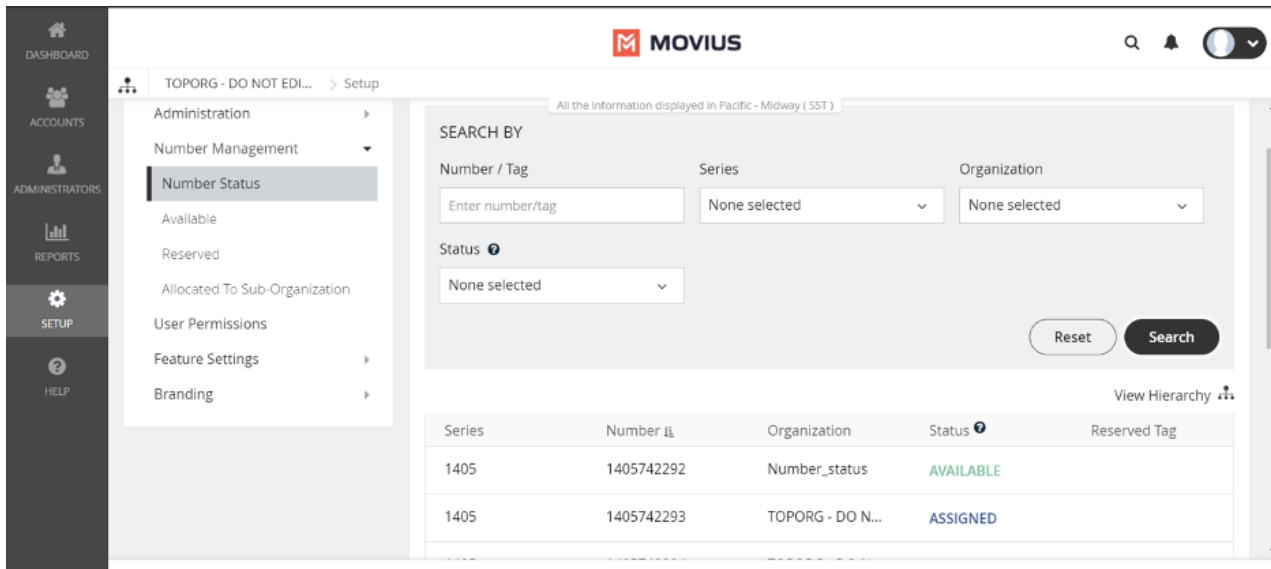
Allocated Numbers : 153673

Number Status and Actions

Last Modified on 09/10/2021 11:04 am EDT

The **Number Status and Actions** section under the **Setup** tab has utilities for searching numbers and performing actions.

- You can search numbers by number, tag, series, organization, or status
- You can move numbers and add, edit, and delete reserve tags.



Search By

Use the Search By panel to refine your results. After making your selections, you will need to click the **Search** button. To undo your selections, click the **Reset** button.

- **Number / Tag:**
 - Type into the field either the number you're looking for or a reserved tag

Number / Tag

This field will perform partial searches. For example, if you search '1418' and there are numbers or tags that have that sequence as a part of them such as **1418898476**, **1876141877**, **1478761418**, **1418_salestag**, **sales_14182**, all these results will appear.

- **Series:**
 - Use the checkboxes to restrict your search to one or more number series

Series

164 ▼

Search 🔍

All

164

1641

16415488

- Use the Search field within the filter to narrow down your options
- Organization:
 - Use the checkboxes to restrict your search to one or more sub-organizations

Organization

None Selected ▼

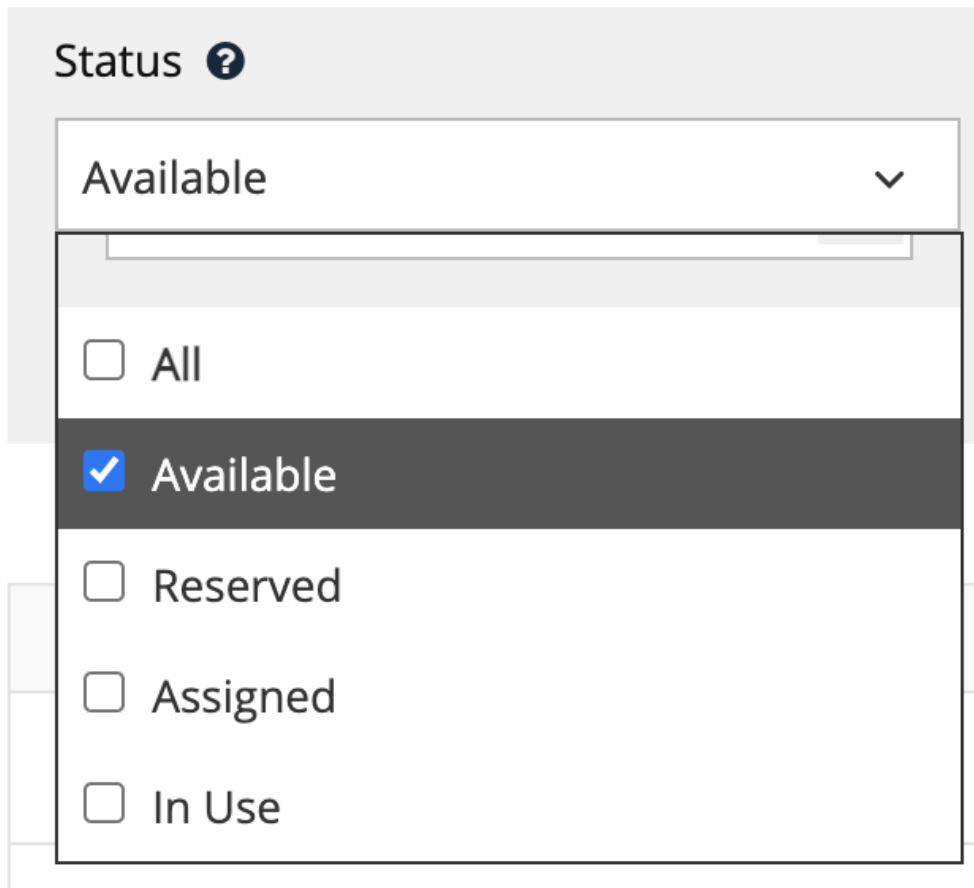
Search 🔍

All

WhatsappOrg

Sub_org d

- Use the Search field within the filter to narrow down your options
- Status:
 - Use the checkbox to restrict your search to one or more statuses including Available, Reserved, Assigned, and In Use
 - Hover over the question mark icon for a reminder of the meaning of each status



- View Hierarchy:
 - Click **View Hierarchy** to explore the sub-organizations within your organization

The actions performed by the Admin depends on which organization they have logged into. For example, If a number in a grandchild org must be moved to the parent organization, then this action is not permitted. This is because the access of the grandchild org is within the org and all the orgs below it.

If you have the right permissions, you can [navigate to the parent organization](#).

- Sort:
 - Hover over the header row of your results to expose a **Sort** button
 - Click it once to sort results by that column. Click it again to reverse the sort order
 - By default, it will display numbers from lowest to highest, characters from A to Z
 - Clicking again will display numbers from highest to lowest, characters from Z to A

Series	Number	Organization	Status	Reserved Tag
--------	--------	--------------	--------	--------------

- Results:
 - Results appear displaying Series, Number, Organization, Status, and Reserved Tag

Series	Number	Organization	Status	Reserved Tag
1405	1405742292	Number_status	AVAILABLE	
1405	1405742293	TOPORG - DO N...	ASSIGNED	

Move and Reserve numbers

The menu icon in the Actions column will show Move and Reserve options for **Available** numbers. It will show the Move option for **In Use** and **Reserved** numbers.

The screenshot displays the MOVIOUS interface for managing number status. On the left is a navigation menu with options like Administration, Number Management, and Number Status And Actions. The main area is titled 'Number Status' and includes a search section with filters for Number / Tag, Series, and Organization. Below the search is a table listing numbers with their status and reserved tags. An action menu is visible for the first row, showing 'Move' and 'Reserve' options.

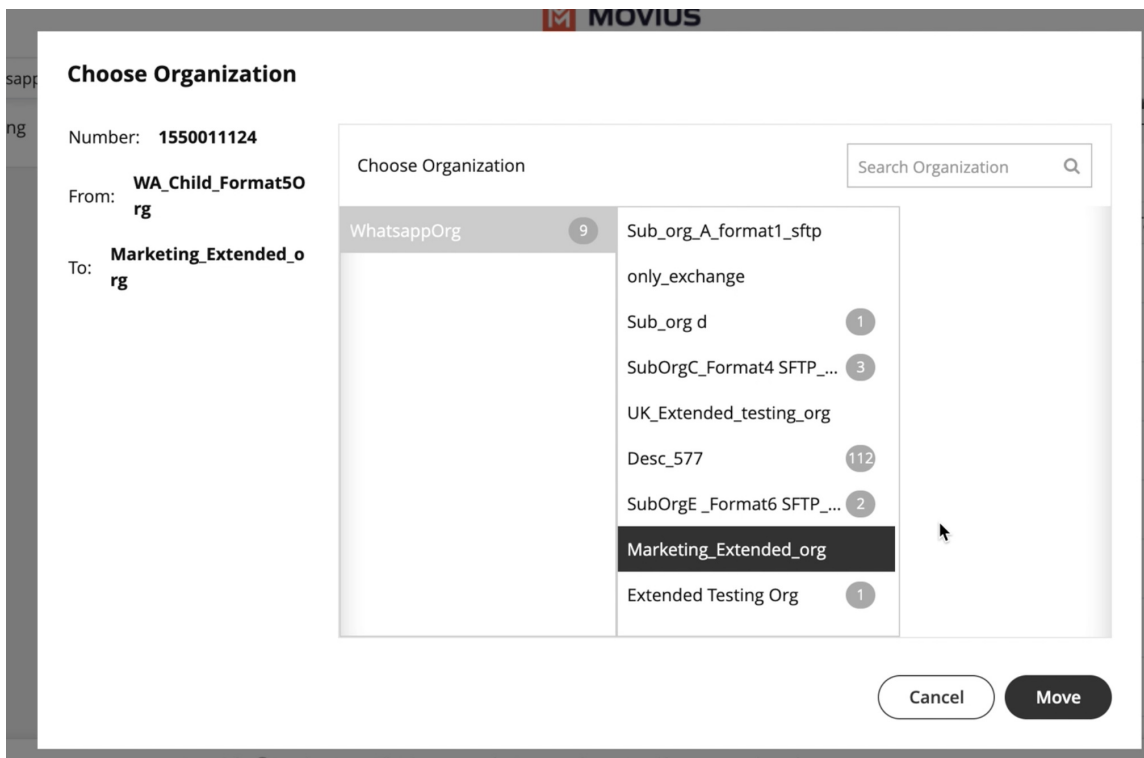
Series	Number ID	Organization	Status	Reserved Tag	Action
1550	1550011128	Wa_grandchild	AVAILABLE		...
1550	1550011132	Wa_grandchild	AVAILABLE		Move Reserve
164	16415488745	Extended Testing Org	RESERVED	sabaresh 2	

Move a number

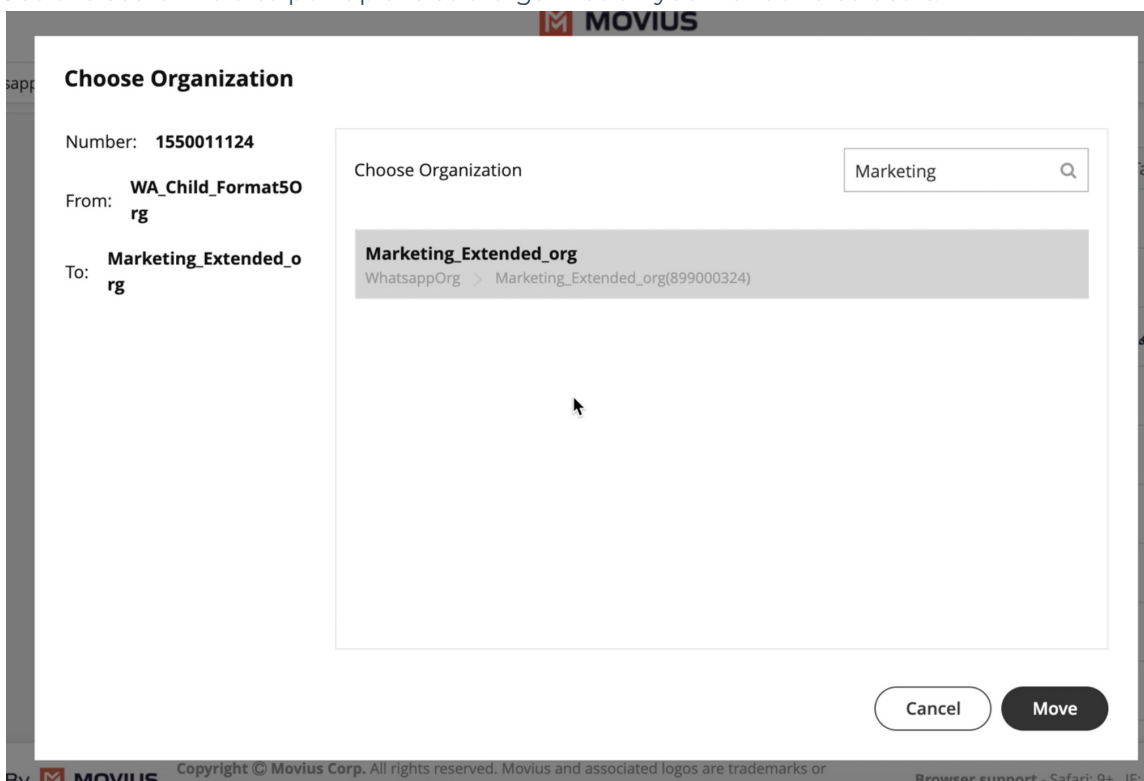
1. Click **Move** from the menu icon in the **Action** column.



2. There are two ways to select the organization you want to move the number to:
 1. Select an organization to display its sub-organizations and keep selecting until you have selected the organization you want to move the number to.



2. Use the search field to pull up the sub-organization you want and select it.



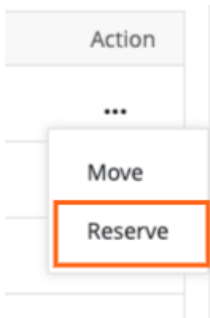
3. Click Move.

Add, edit, and delete Reserved tags

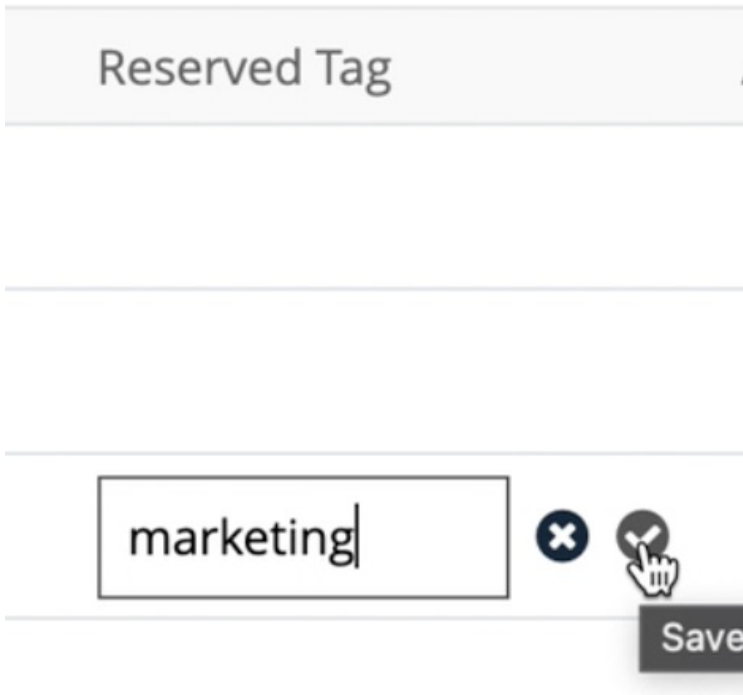
You can add Reserved Tags to Available numbers. If a number is reserved, the Reserved tag column will contain the reserved tag, otherwise it will be blank.

Reserve a number

1. Click **Reserve** from the menu icon in the **Action** column.



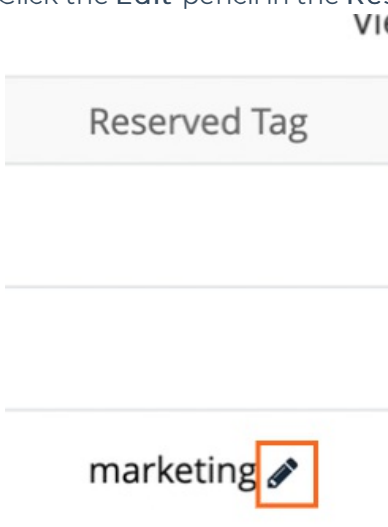
2. In the field that appears in the **Reserved Tag** column, enter your tag name. *Note: you cannot leave this field blank.*



3. Click the check mark to save, or 'x' mark to cancel.

Edit a tag

1. Click the Edit pencil in the **Reserved Tag** column.

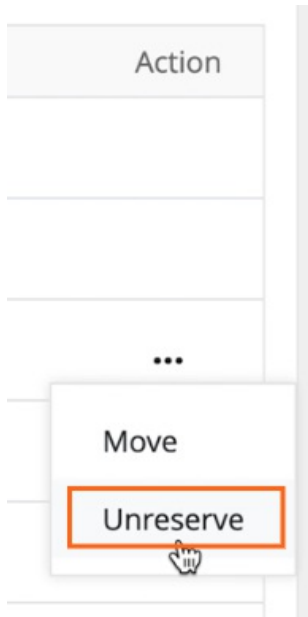


2. Edit the tag name in the field.

3. Click the check mark to save, or 'x' mark to cancel.

Unreserve a number

1. Click **Unreserve** from the action menu to remove the tag. *Note: The status of the number will change from Reserved to Available.*



Manage Reserved Numbers

Last Modified on 10/26/2021 2:48 pm EDT

Read this to learn about how to work with reserved numbers, tagging them, editing and deleting tags, etc.

Overview

Tags put numbers in the Reserved pool. Tags help admins find numbers that are reserved for a specific purpose.

- You're required to add a tag to reserve a number. You can optionally reserve the number for a specific organization.
- You can reserve and unreserve numbers from Number Status and Actions or from Number Management
- When numbers are initially deleted, the admin has a one-time option to tag the number and add a forwarding number. See *Delete user and release, reserve, or forward calls*.
 - *Note: After completing the deletion, it is impossible to forward a number that didn't initially have a forwarding number attached to it.*
 - However, if there is a forwarding number attached at that time, it can be edited or deleted.

Before you start

- An admin must have "Setup" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal*.

Reserve a number

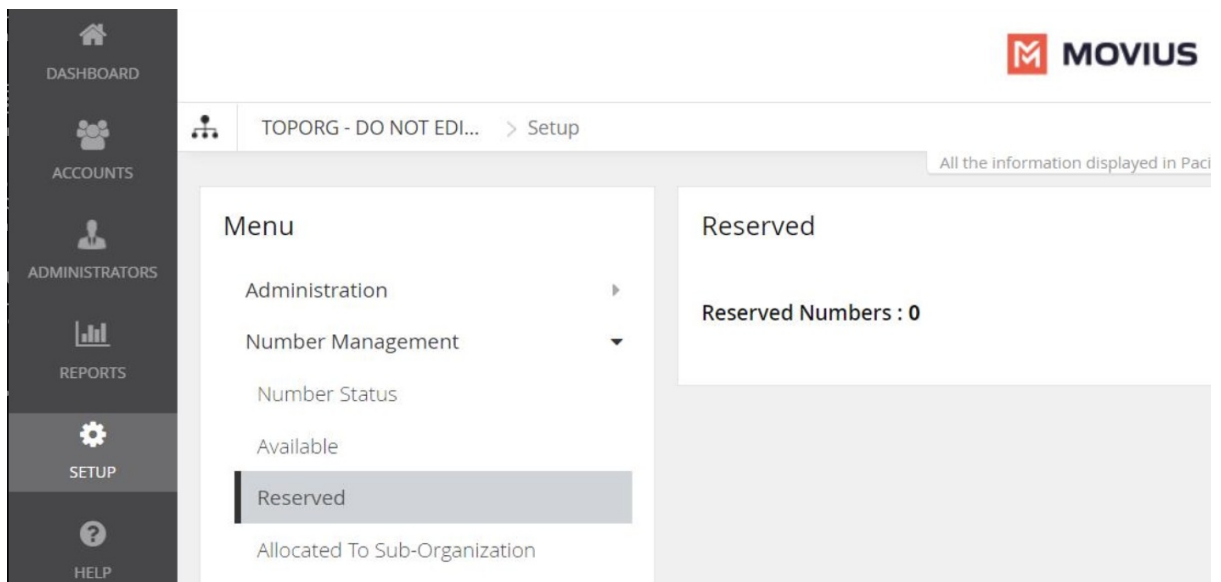
Reserve a number from Number Status and Actions

1. Go to Setup > Number Status and Actions
2. Click **Reserve** from the Actions menu and enter the tag name. *Note: You can't leave tag name blank.*

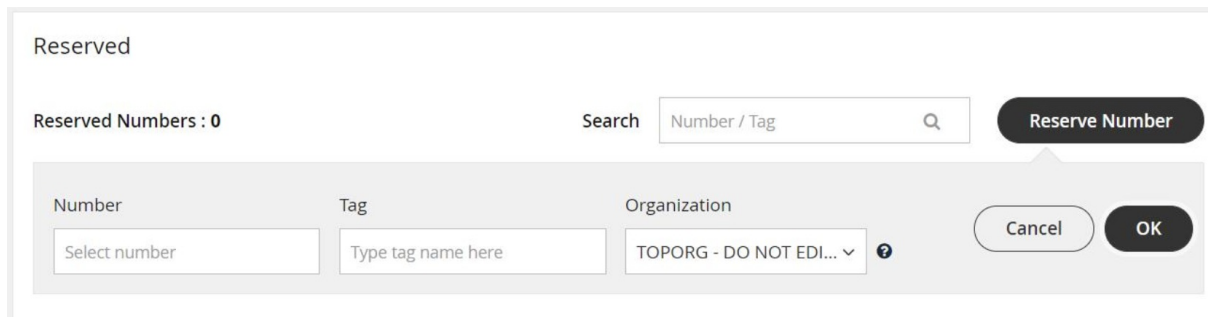
To Unreserve, click **Unreserve** from the Actions menu. This will remove the tag from the number and put it in the Available pool.

Reserve a number from Number Management

1. Go to Setup > Number Management > Reserved Numbers.

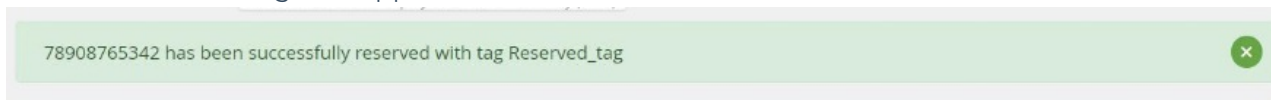


2. Click Reserve Number.



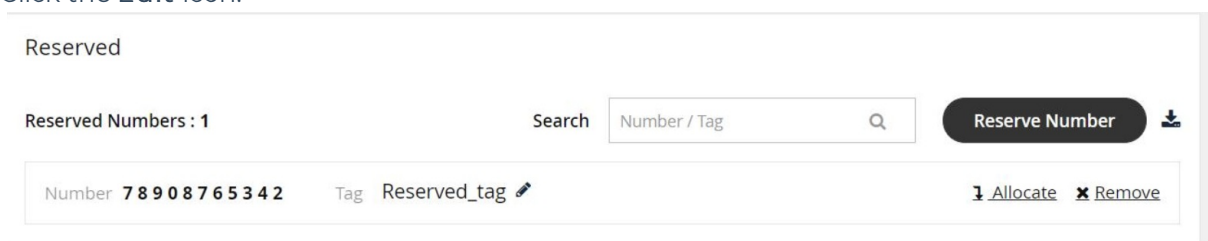
3. Select the number, enter the Tag, and select the Organization you are allocating the number to. Then click OK.

A confirmation message will appear and the number will enter the Reserved Numbers list:



Edit a tag or forwarding number

1. Go to Setup > Number Management > Reserved Numbers.
2. Search for the Number or Tag to narrow your results, if desired.
3. Click the Edit icon.



4. Edit the Tag then click Save.
5. Click Forwarded to to edit the Forwarding Number.
6. Select Update the Number or Remove the Number according to your needs, then click Proceed.


Delete a tag


1. Go to **Setup > Number Management > Reserved Numbers**.
2. Search for the **Number** or **Tag** to narrow your results, if desired.
3. Click **Remove**.

Reserved

Reserved Numbers : 1

Search



Number **78908765342** Tag **Reserved_tag** 

4. You can then confirm you want to delete the **Tag**. The number will be removed from the **Reserved Numbers** list.

Withdraw Unused Numbers

Last Modified on 10/26/2021 2:35 pm EDT

Read this to learn how to withdraw an unused number.

Overview

Withdrawing a number will remove it from being allocated to that Sub-Organization and moves it to the immediate parent organization. You can only withdraw unused numbers.

Before you Start

- An admin must have "Setup" Role in the organization to do these instructions. See [What Admin Roles are in the Management Portal](#).

Withdraw unused numbers

1. Go to Setup > Number Management > Allocated to Sub-Organization.
2. Click on the organization to expand it and view the allocated number series.

Series	Allocated	Unused	Action
1 2 5 6	4	1	Withdraw Numbers
2 3	1	0	

3. Click **Withdraw Numbers**.
4. Enter the quantity to be withdrawn.

Withdraw Numbers

Unused numbers **1**

Enter quantity to withdraw :

Cancel **Proceed**

5. Click **Proceed**. *Note: the quantity should not be greater than the Allocated Numbers.*

You're done!

When completed a confirmation message will appear

1 number from series 1256 has been successfully withdrawn from Digital Safe UK3 organization



Allocated to Sub-Organization

Allocated Numbers : **153673**

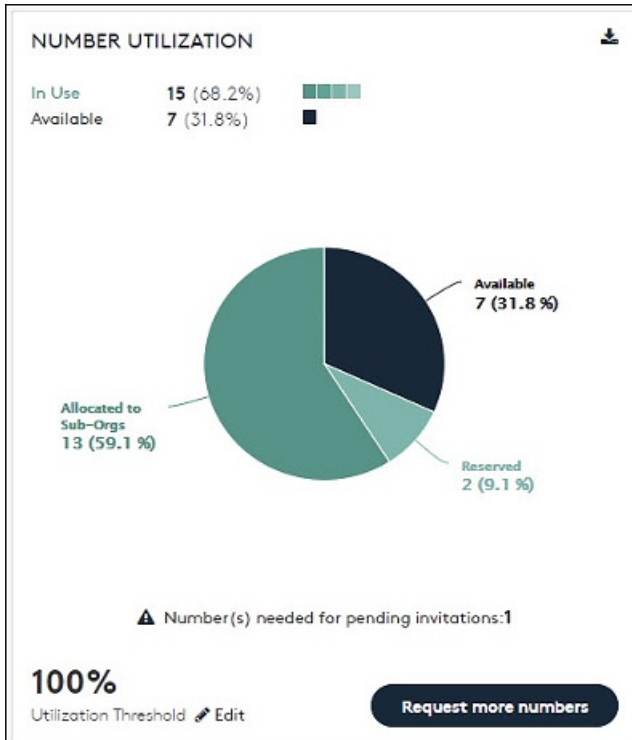
Number Utilization

Last Modified on 10/26/2021 2:50 pm EDT

Read this to learn how to interpret the Number Utilization panel.

About Number Utilization

On the Number Utilization panel on the Dashboard, you can view how many numbers you're using and have available.



In use: Shows the numbers which are currently in use. **In use** numbers include assigned numbers, reserved numbers, registered numbers, and numbers allocated to an organization.

Available: Shows the numbers which are unallocated and can be used by the administrator.

Click anywhere on the Pie chart to see the number utilization in detail as below:

Organization	Total	Available Pending Invitation	Reserved	Assigned	Registered	Allocated To Sub-Organizations
ABC Banking Corporation	35	16 (2)	3	1	0	15

Allocated To Sub-Organizations

Sub-Organization	Total	Available Pending Invitation	Reserved	Assigned	Registered	Allocated To Sub-Organizations
Operation	7	5 (1)	0	1	1	0
Retail Banking	8	4 (1)	1	0	3	0

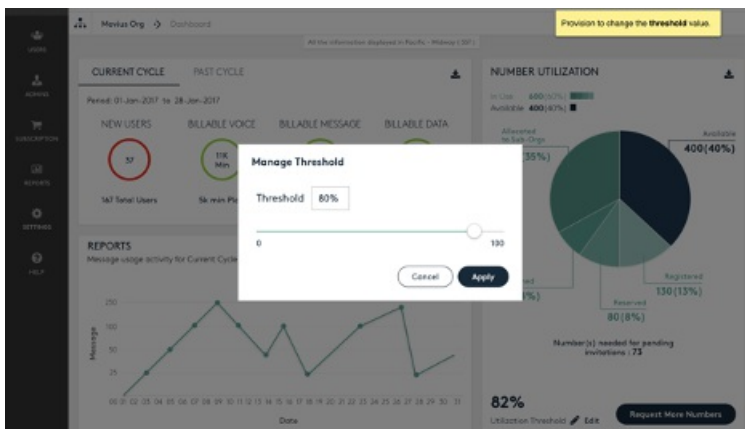
The total quantity of available numbers is divided into 5 categories:

- **Available:** The numbers which are currently not in use.
- **Reserved:** The numbers which are tagged for later use.
- **Assigned:** The numbers which are assigned to a user through invitation, but the user has not on-boarded yet.
- **Registered:** The user has successfully on-boarded.
- **Allocated to Sub-Organizations:** The numbers which are allocated to sub-organizations.

Utilization Threshold: It is the upper limit (in percentage) allocated for notifying the Administrator through an email, that he has utilized the maximum assigned threshold. Every time the administrator assigns a new number till all the available numbers are utilized, an email notifying the same will be sent.

You can edit the Utilization Threshold percentage value to be anywhere between 1 to 100.

Example: In Figure 9 the Utilization Threshold is assigned as 80%. This means, when the Number Utilization percentage reaches 80%, the administrator will receive an email saying that the maximum assigned threshold has been reached.



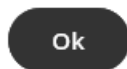
Request More Numbers: When you get an email notification that you have reached the assigned Utilization Threshold, you can request for more numbers using the steps below:

- Click **Request More Numbers**.
- A popup with the following message appears:

Request for More Line Numbers

Call: +1 800 688 4001


Email: Support@moviuscorp.com



- Click **OK**.

- Send an email requesting for more numbers to the email address mentioned in the popup.
- You may also call on the number appearing in the popup.

Download Report: Two reports related to **Consumption (Voice, Message and Data)** and **Number Utilization** can be downloaded from two separate download icons on this screen. The same can be downloaded by following the below steps:

1. Click  (refer to Figure 4) to download the required report.
 2. Choose **Open** or **Save** to view or download the CSV file.
-

Create user permissions

Last Modified on 11/03/2021 7:41 pm EDT

Read this to learn how to create custom user permissions that you can apply to Organizations in the Setup tab.

Overview

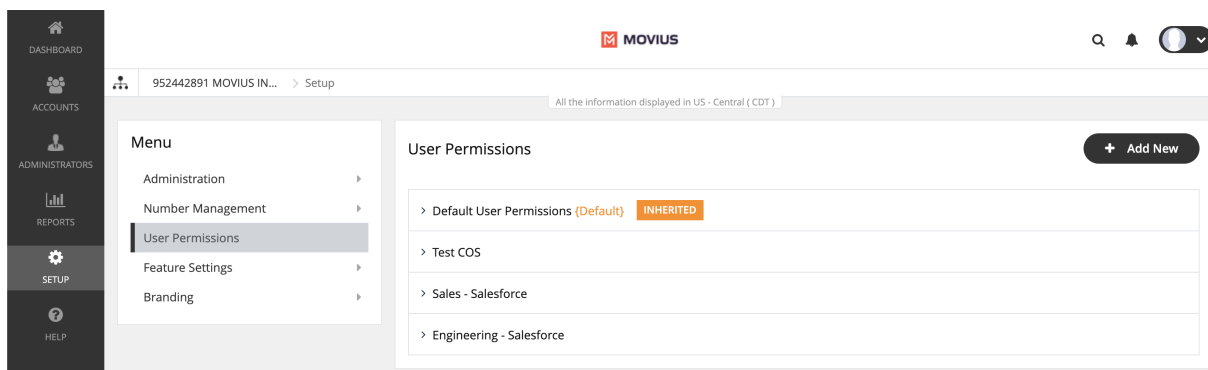
User permissions define what app features are available to users of the MultiLine app.

Before you Start

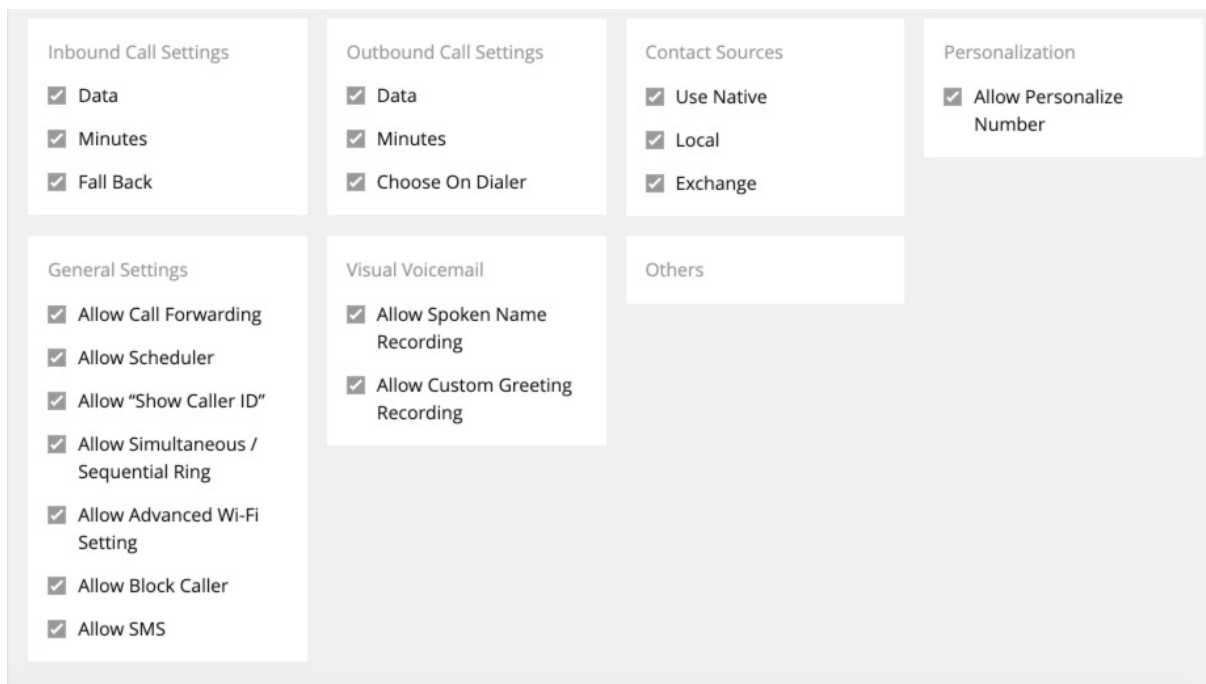
- An admin must have "Setup" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal*.
- Default User Permissions will set permissions for users that are not part of a subgroup.

Create new custom permissions

1. Go to the Setup tab and click User Permissions.
2. Click Add New.



3. Check the box for a feature to permit it, or uncheck the box for a feature to disallow it.



List of permissions

Inbound Call Settings

- Data: Enable/Disable using data to receive inbound calls.
- Minutes: Enable/Disable using minutes to receive inbound calls.
- Fall back: Enable/Disable trying data first, then minutes, to receive inbound calls.

Outbound Call Settings

- Data: Enable/Disable using data to make outbound calls.
- Minutes: Enable/Disable using minutes to make outbound calls.
- Choose on Dialer: Enable/Disable choosing data or minutes from the dialer when making outbound calls.

Contact Sources

- Use Native: Enable/Disable using native contacts service in MultiLine.
- Local: Enable/Disable importing native contacts into MultiLine.
- Exchange: Enable/Disable exchanging contacts between native device and MultiLine server.

Personalization

- Allow Personalize Number: Enable/Disable the ability to customize MultiLine number.

General Settings

- Allow Call Scheduler: Enable/Disable call scheduler function.
- Allow Scheduler: Enable/Disable scheduler function.
- Allow "Show Caller ID": Enable/Disable caller ID function.
- Allow Simultaneous/Sequential Ring: Enable/Disable simultaneous/sequential ring function.

- Allow Advanced WiFi Setting: Enable/Disable toggling of the Advanced Wifi settings.
- Allow Block Caller: Enable/Disable incoming caller blocking function.
- Allow SMS: Enable/Disable SMS messaging.

Visual Voicemail

Allow Spoken Name Recording: Enable/Disable spoken-name voicemail greetings.

Allow Custom Greeting Recording: Enable/Disable custom, personable voicemail greetings.

You've created your custom permission

You can assign the permission set when you **add users**.

Managing Email Domain Restrictions for MultiLine Invitations

Last Modified on 10/27/2021 2:21 pm EDT

Administrators can restrict the email domains that can receive MultiLine invitations, to prevent other administrators from inviting users from those domains.

Overview

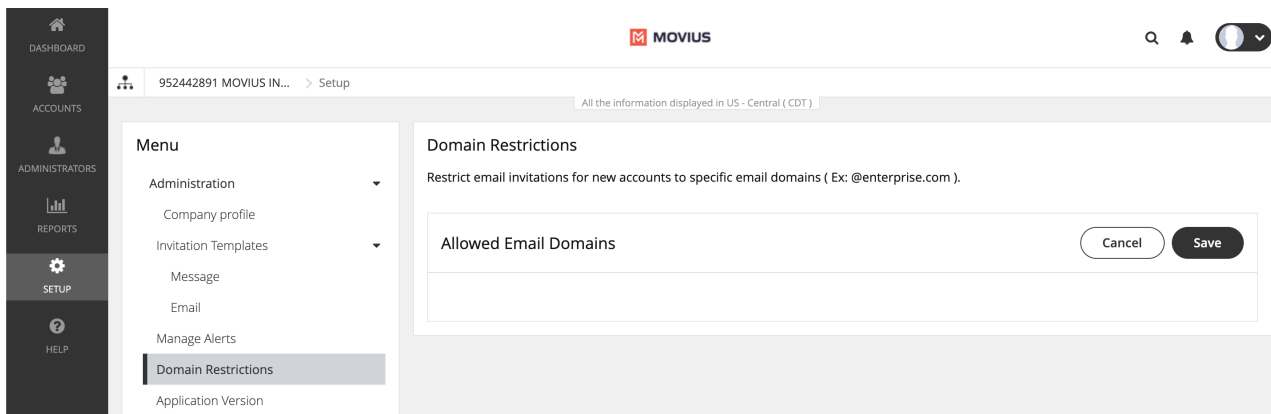
The most common use case of restricting email domains is to enforce that invitations are sent to corporate email accounts to prevent invitations from accidentally being sent outside the organization.

Before you Start

- An admin must have "Setup" Role in the organization to do these instructions. See [What Admin Roles are in the Management Portal](#).
- Navigate to the top-most organization that you want to receive the changes. See [Navigating Organizations](#).

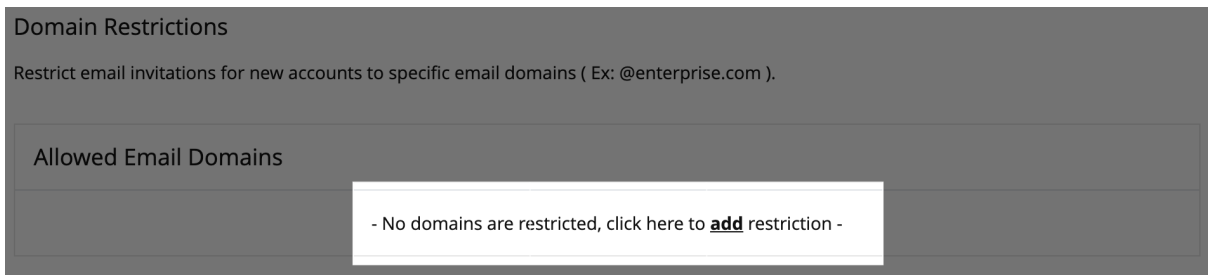
How to add Allowed Email Domains

You can set up a list of allowed email domains under Administration in the Setup tab. This restricts which domains can receive invitations.



Note: If there are no entries under Allowed Email Domains, emails can be sent to any email domain.

1. Go to Setup > Domain Restrictions.
2. If you haven't set up any allowed domains yet, click **add** from the message.



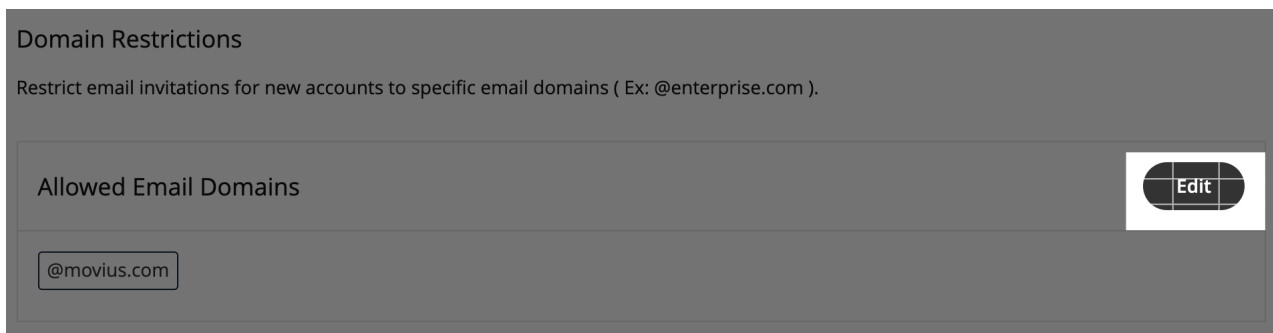
3. Start typing in the **Allowed Email Domains** area, starting with '@' and following with your desired domain and click enter.



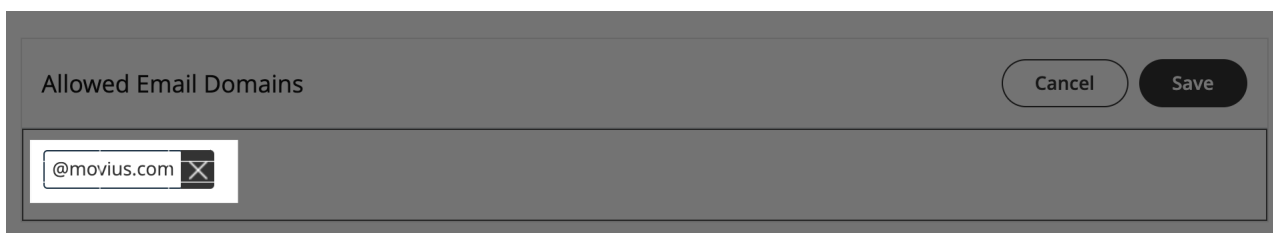
4. Click **Save** and then **Yes** to confirm.

Step 2: Editing and deleting

Add more or delete Email Domains by clicking **Edit**.



To delete, click the x next to an existing domain.



You're done!

Administrators will now only be able to send email invitations to the Allowed Domains.

Customize email invitations

Last Modified on 11/03/2021 7:47 pm EDT

Administrators in the Management Portal can customize email invitations. We provide a default email invitation with the required information which you can edit according to the needs of your organization.

Overview

Users receive MultiLine invitations when you add them to an organization. These invitations contain the information users need to download and activate MultiLine and credentials for activating mobile and desktop apps. Some organizations may want to change the default invitation we provide to add their own content or formatting.

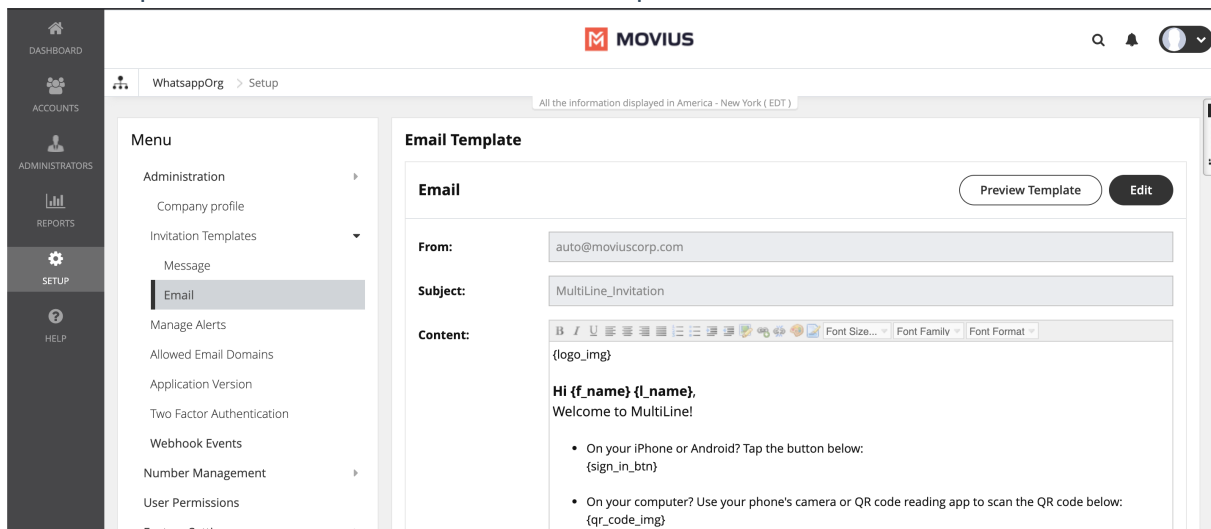
Before you Start

- An admin must have "Setup" Role in the organization to do these instructions. See [What Admin Roles are in the Management Portal](#).

How to edit the email invitation template

You can use the editor to add content and formatting to the email.

1. Go to Setup > Administration > Invitation Templates > Email



2. Click **Edit** to make changes. *Note: You must include required variables. See below for list of variables.*
3. Click **Preview Template** to see how edits would look and make sure that parameters are working properly.
4. Click **Save**.

List of invitation variables

Variable Name	Description	Required?
{f_name}	First name of the invited user	No
{L_name}	Last name of the invited user.	No
{app-link}	App link configured by the system administrator. Tapping app link redirects the user to download the app.	No
{qr_code_img}	This is the QR code. Users scan the QR code to automatically download the app (if not already downloaded) and begin activation.	Yes
{sign_in_btn}	This is the "Download and Activate" button. Users tap the button to automatically download the app (if not already downloaded) and begin activation.	No
{u_name}	Email address or mobile number of the invited user.	No
{pwd}	System-generated password for the invited users.	No
{market_code}	Company or Organization ID is automatically defined when the organization is defined.	No

Note: if you do not include {u_name}, {pwd}, and {market_code} variables, your users will not be able to use manual activation.

Tip: Provide help resources to users - It's a good idea to link to our help resources here at <https://help.moviuscorp.com>. Users can also get to help resources within the application in **Settings > Help**.

Your custom MultiLine email invitation is ready!

Any new invitations sent will now have your custom content and formatting.

Customize SMS invitations

Last Modified on 10/18/2021 4:45 pm EDT

Read this instruction to learn how to customize SMS invitations.

Overview

Administrators in the Management Portal can customize SMS invitations. We provide a default SMS invitation with the required information, but some users may wish to edit according to the needs of their organization.

Before you Start

- An admin must have "Setup" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal*.

Edit the SMS invitation template

Change the text of the SMS invitation template in Setup > Message Template.

1. Go to **Setup > Administration > Invitation Templates > Messages**.
2. Click **Edit**. Make any desired changes.
Note: You must include required variables. See below for list of parameters
3. Click **Preview Template** to see how edits would look and make sure that parameters are working properly.
4. Click **Save**.

List of invitation variables

Variable name	Description	Required?
{f_name}	First name of the invited user.	No
{l_name}	Last name of the invited user.	No
{sign_in_link}	If the user does not have the app, clicking this link will take the user to the App or Play store. If the user already has the app, it will open the app.	Yes

Your custom MultiLine SMS invitation is ready!

All new SMS invitations sent will have your custom content.

Send MultiLine Invitations (Add users)

Last Modified on 11/03/2021 7:41 pm EDT

Learn how to send invitations to users so that they can use them to activate their MultiLine applications.

Overview

MultiLine invitations contain user credentials and a password to use for MultiLine activation. Users must activate MultiLine on their device every time they install or reinstall the application. If users lose their invitation, you'll need to send them a new password. See [Getting Started with MultiLine for the user experience](#).

Before you Start

- An admin must have "Accounts" Role in the organization to do these instructions. See [What Admin Roles are in the Management Portal](#).
- If you would like to [customize the email invitation](#), you should do this prior to this step.
- If your users need [custom permissions](#), you should create those prior to this step.
- Sending an invitation requires there to be an Available or Reserved number to be assigned to the user account.

Send invitation

From Accounts, you can add accounts individually, or upload multiple accounts using a CSV file. Either way, first go to the Accounts tab, and then click **Add Account**.

<input type="checkbox"/>	Name	Username	Organization	Status
> <input type="checkbox"/>	Sprint Sipp	opssaas04@gmail.com	Health Monitor	

Add a single account

952442891 MOVIOUS IN... > Accounts > Add Account

All the information displayed in US - Central (CDT)

SINGLE ACCOUNT **MULTIPLE ACCOUNTS**

First Name * Application(s) * MultiLine

Last Name * Number Of Lines Allowed 1 [Assign Number](#)

Organization 952442891 MOVIOUS INTERACTIVE CORP User Permissions Default User Permissions (Default)

Email or Device # *
with country code
(e.g. For U.S: 1xxxxxxxxx)

*By clicking on Invite, you agree that you have obtained permission from recipients to receive SMS notifications through employee or other agreement. Message and data rates may apply.

1. Enter the **First Name** and **Last Name**.
2. Enter the **Email or Device #** that the invitation will be sent to.
3. Click the **Assign Number** link.
4. Choose a number from the drop-down menu.
5. Select the **User Permissions** to which to assign this number.
6. Click the **Invite** button, and you have invited a user.

Add multiple accounts

952442891 MOVIOUS IN... > Accounts > Add Account

All the information displayed in US - Central (CDT)

SINGLE ACCOUNT **MULTIPLE ACCOUNTS**

To import and/or invite users in bulk, please use this [CSV template](#) to upload the users
Select the Organization for which the users are to be imported and/or invited. You can directly invite the imported users or you can import them and invite them later.

Choose Organization Application(s) * User Permissions Choose CSV File

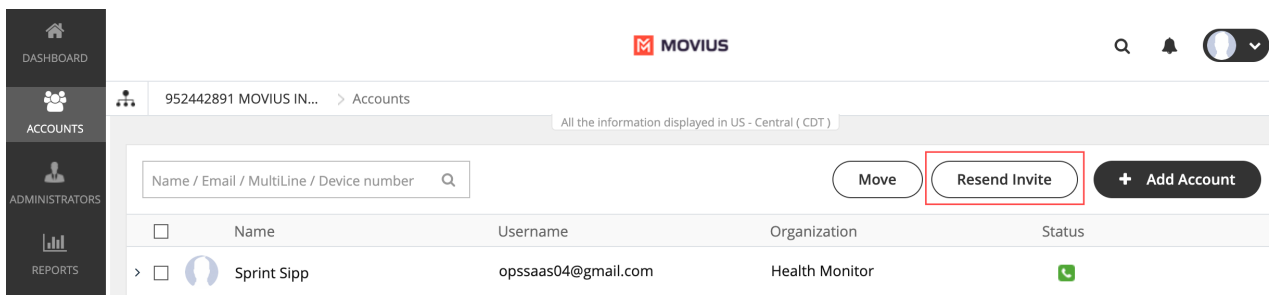
952442891 MOVIOUS INTERACTIVE CORP MultiLine Default User Permissions (Default) Upload CSV File

*By clicking on Import & Invite, you agree that you have obtained permission from recipients to receive SMS notifications through employee or other agreement. Message and data rates may apply.

1. Click the **Multiple Accounts** tab.
2. Download the **.CSV template** and paste in your users. You can copy/paste from an Excel document.
3. Choose the **sub-organization** that you want these users to be added to.
4. Choose the **User Permissions** group for this upload.
5. Upload the CSV and click **Import and Invite**. This will trigger the invitation to all the users in the CSV. *Note: This will not assign numbers to each user. They will have the option to choose the number themselves, when they onboard onto the application.*

Resend invitation

1. Select the checkbox next to the **User Name**.
2. Click **Resend Invite**.



- The **Resend Invite** button stays active both in the **Accounts** as well as the **Administrator** pages, irrespective of whether the numbers are available or not.
- Moving the pending invitations from one organization to another will not be allowed if the destination organization does not have enough numbers to onboard.
- If a pending invite (without an assigned number) is moved from one organization to another, and if the destination organization does not have enough numbers available then the **Move** button gets disabled. On selecting the destination organization an error message "*Unable to move account(s). You do not have enough numbers available in the selected organization*" appears on mouse hover.

Invitation FAQ

Can I assign a number to a specific user?

Yes. Individual numbers can be assigned to a specific person. This is typically needed when numbers are ported or when you need to re-assigning a previously-used number to a new user. Can I send bulk invites to users and assign the number?

Can I bulk assign numbers to users?

No. At this time, it is not possible to assign a specific number to a user if you utilize a bulk invitation.

Can I resend an invitation if a user did not receive the email?

Yes. Invitations can be resent to any user. Simply find the user in the Accounts tab of the Portal and click the "Send Invite" button.

How can I tell if a user has used their invitation?

Track **Invitation status** in the Accounts tab.

What do I do if I invite a user to the wrong organization?

Move the user to the desired organization.

What do I do if a user has changed their personal phone number (new device or SIM card)?

When users activate MultiLine, their accounts are associated with their personal phone number. If

the user wants to keep the same MultiLine number, **delete the user's current account** and send a new invitation to the user.

Search users and view invitation status

Last Modified on 10/26/2021 1:54 pm EDT

Read this to learn how to use the **Accounts** tab to check whether users have onboarded.

Overview

The **Accounts** tab tracks invitation status and some usage, which makes it a great place to start checking whether people are onboarding successfully.

Before you Start

- An admin must have "Accounts" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal*.

Check invitation status and usage

All existing user accounts are visible with the current status of the account on the **Accounts** tab. You can search for accounts by **Name**, **Email ID**, **MultiLine Number** or **Device Number**.

1. Hover over the icons under **Status** to view their current status.
 - Invite Status meanings:
 - Green: Successfully activated
 - Amber: Invitation sent, but user hasn't activated
 - Red: Suspended or Blocked
 - Grey: Opted Out
 2. For Green (successfully activated) accounts, you can click the side arrow for more information, including
 1. Whether the user has started calling and messaging
 2. The type of device, Android or iOS
 3. Assigned user permissions See *Create User Permissions*.
-

Move users

Last Modified on 10/26/2021 1:58 pm EDT

Read this to learn how to move an account to a different organization.

Overview

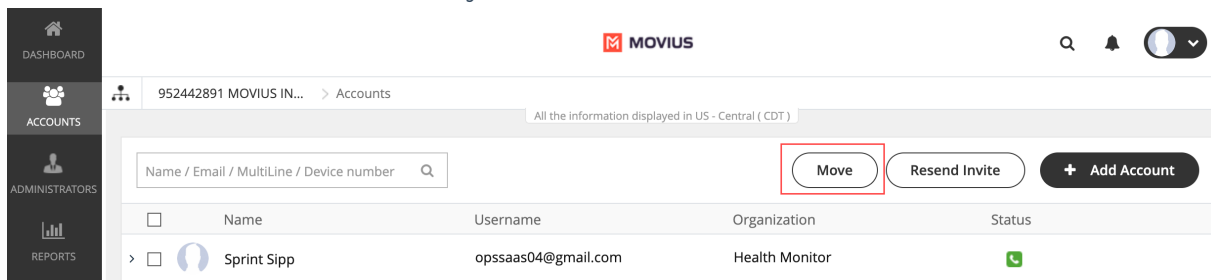
From **Accounts**, you can move an account from organization to another within your tree (according to the hierarchy). Once the user is moved, all settings of the new organization will be applied to the user.

Before you Start

- An admin must have "Accounts" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal*.

Step 1: Optional Title for Step

1. Go to **Accounts**.
2. Select the checkbox for the account you want to move and click **Move**.



3. Search or select the **Organization** or **Sub-Organization** and click **Move**.

Move Account(s)

1 Account Selected

Move To

Name	Organization
Sprint Sipp	Health Monitor

Cancel

Move

4. Click **Yes** on the confirmation page.
 5. Click **Done**.
-

Suspend a user

Last Modified on 10/26/2021 2:01 pm EDT

Read this to learn how to suspend a MultiLine account.

Overview

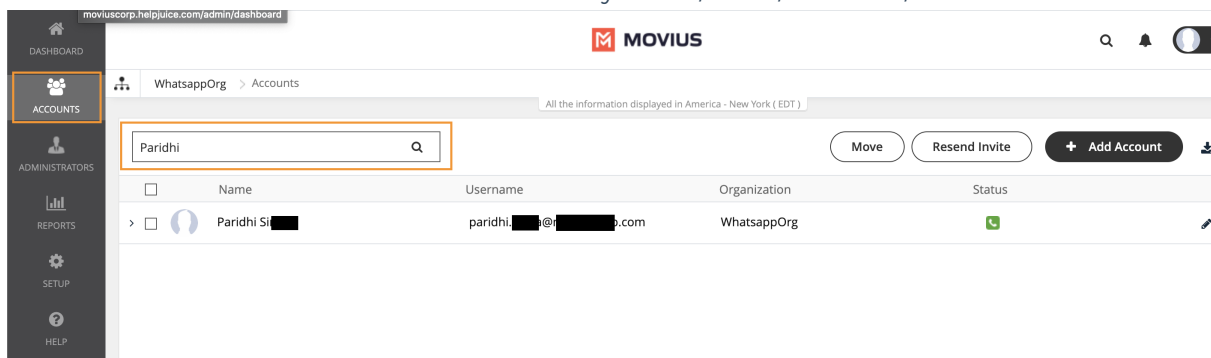
In case a user is misusing the app or is doing activities not allowed by the organization, MultiLine gives the account owner the option of suspending the user's number.

Before you Start

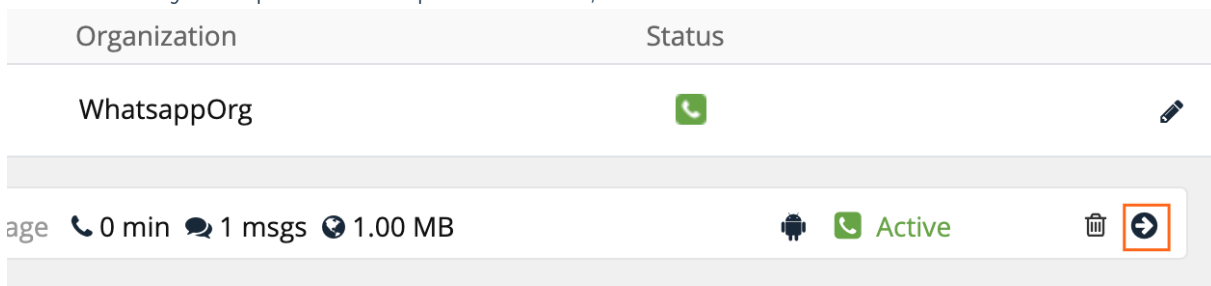
- An admin must have "Accounts" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal*.

Suspend the user

1. Go to the Account tab and search for the user by Name/Email/MultiLine/Device Number.



2. Click the entry to expose the dropdown menu, then click the Edit Line icon.



3. Select the check box for Account Suspended and click Save.

The user is suspended

You can unsuspend the user by unchecking the box at any time. Or you can delete the user.

Delete user and release, reserve, or forward calls

Last Modified on 10/26/2021 1:27 pm EDT

Read this to learn how to delete a user from the Accounts tab.

Overview

Admins may need to delete users when they leave the company, switch their personal phone numbers, or as a troubleshooting step. After deletion, you can release the number to the Available pool, reserve the number for a specific purpose, or add a forwarding number.

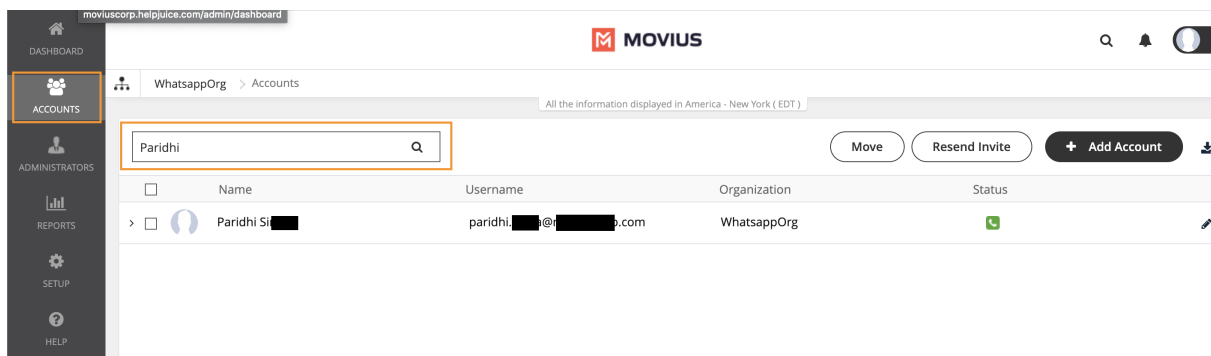
Before you Start

- An admin must have "Accounts" Role in the organization to do these instructions. See [What Admin Roles are in the Management Portal](#).

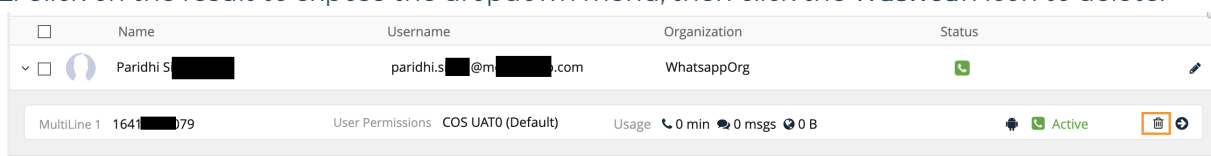
Delete the user

A deleted user will immediately lose access to the MultiLine application.

1. Go to the **Accounts** tab and search for the user by name, MultiLine number, device number, or email ID.



2. Click on the result to expose the dropdown menu, then click the Trashcan icon to delete.



3. A pop-up window will appear asking if you want to tag the number, or enter a number to forward calls to.

- If you do not tag the number, it will enter the Available pool.
- If you tag the number, it will enter the Reserved pool.
- You must tag the number to forward calls. If you do not set the forwarding number at this step, you cannot choose to forward calls later.

- If the deleted number is saved with tag and forward number, than the forward number can be updated later from the Reserved pool in the Setup > Number Management section

Delete MultiLine

Do you want to tag(**16415488350**) for later use?



Enter number for call forwarding (Optional), Forward number cannot be added later

Cancel

Proceed

Enable PBX phone for a user

Last Modified on 10/26/2021 2:10 pm EDT

Read this to learn how to enable PBX phones for users who will use the same number for their PBX phone and their MultiLine.

Overview

Enabling PBX phones will allow for the user's mobile phone and desk phone to ring simultaneously, so the user can pick up the call at their desk or when they're mobile. *Note: The PBX Phone is disabled by default.*

Before you Start

- Not all organizations will have the option to enable PBX phone
- An admin must have "Accounts" Role in the organization to do these instructions. See [What Admin Roles are in the Management Portal](#).

Enable PBX Phone

1. When adding a user or editing a user, go to a User's Profile tab.
2. Click on the checkbox for PBX Phone to enable.
3. Click Save.

Profile Activity Delete

MultiLine	16416316065	Usage	📞 Calls	📧 Messages	📊 Data
PBX Phone	<input type="checkbox"/> Disabled		8 min	0 msgs	0 B
User Permissions	default user permissions (Default)	Call Recording	<input checked="" type="radio"/> Enable	<input type="radio"/> Disable	
Organization	GEO Testing	Message Logging	<input checked="" type="radio"/> Enable	<input type="radio"/> Disable	
Device #	🍏 916363806095		<input type="checkbox"/> Login Suspended		
Language	English		<input type="checkbox"/> Account Suspended		

Close Save

Manage Alerts: Choose activities that trigger email notifications to administrators

Last Modified on 10/26/2021 3:12 pm EDT

You can set up alerts to send an email to the Organization administrator and any other designated recipients.

Overview

Setting up alerts helps your organization keep track of what is happening in the Management Portal. You can manage alerts under Administration in the Setup tab.

Before you Start

Admins must have Setup privileges in the organization to manage alerts.

Turning alerts on or off

Lead in sentence.

Event Description	Email Recipients	Status
<input type="radio"/> Suspicious Login Activity	Dave.Townsend@MoviusCorp.com	<input checked="" type="checkbox"/>
<input type="radio"/> User Granted Administrator Privilege	Dave.Townsend@MoviusCorp.com	<input checked="" type="checkbox"/>
<input type="radio"/> Account Added	Dave.Townsend@MoviusCorp.com	<input checked="" type="checkbox"/>
<input type="radio"/> User Revoked Administrator Privilege	Dave.Townsend@MoviusCorp.com	<input checked="" type="checkbox"/>

1. Write steps in a numbered list. Include screenshots with a step whenever applicable.
2. When you add a screenshot, add one linebreak (press shift-enter) after the image for extra space between instruction.
3. If the step is common, make a snippet.

Adding recipients to an alert

Edit Alerts

Alert Name

Account suspended by administrator

Deliver To

Organization Administrator

Other Recipients

Cancel

Save

What alerts are available?

Alert Name	Description
Account Moved	An administrator can select an organization administrator or a recipient to receive this alert when an account is moved to or from the organization.
Threshold exceeded for invitations	An administrator can select all administrators or other recipients to receive this alert when the count of numbers needed for pending invitations exceeds the count of available numbers.
User granted administrator privilege	An administrator can select all administrators or other recipients to receive this alert when administration rights are granted to a user.
Suspended Account made active	An administrator can select all administrators or other recipients to receive this alert when a user account that was previously suspended is reactivated.
Account added	An administrator can select all administrators or other recipients to receive this alert when a new Movius user account is added in the Portal.
New administrator added	An administrator can select all administrators or other recipients to receive this alert when a new organization administrator account is added in the Portal.

Alert Name	Description
Number Utilization threshold exceeded	An administrator can select all administrators or other recipients to receive this alert when the percentage of numbers used exceeds the set threshold.
User revoked administrator privilege	An administrator can select all administrators or other recipients to receive this alert when a user administrator rights are revoked.
Suspicious login activity	An administrator can select all administrators or other recipients to receive this alert when an unauthorized person is attempting to access a user account.
Account deleted	An administrator can select all administrators or other recipients to receive this alert when an administrator deletes a MultiLine user account.
Administrator and MultiLine password changed	An administrator can select all administrators or other recipients to receive this alert when a user password is changed.
Account suspended by administrator	An administrator can select all administrators or other recipients to receive this alert when a user account is suspended.
Privacy Settings Opted Out	When a user turns-off or rejects privacy policy, the user account will be suspended. An alert is sent to the defined administrator.
Privacy Settings Resumed	When a user turns-on or resumes privacy policy, the user account will be resumed. An alert is sent to the defined administrator.

Store and Forward with Digital Safe

Last Modified on 10/26/2021 3:17 pm EDT

This article provides a description of Digital Safe, an option of the Movius solution that provides offloading of voice, SMS recordings, and (if enabled) WhatsApp messages.

What is Digital Safe?

Digital Safe offers a simple method for your enterprise to receive permanent copies of your call, SMS, and (if enabled) WhatsApp message activity for compliant archival.

- Your enterprise will have access to recordings as often as the data is uploaded from Digital Safe.
- Digital Safe can temporarily store the data in the event of a short-term outage or maintenance preventing you from receiving its data.
- Digital Safe doesn't require the dedicated private connections of other methods.
- Digital Safe doesn't require specialized equipment in your Data Center.

With Digital Safe, the Movius platform will export recordings via a secure SFTP interface at regular pre-defined intervals. The Digital Safe SFTP Offload solution uses secure SFTP connections to periodically push recordings to your SFTP server where an intermediary can retrieve for integration with an archiving platform.

We configure the Digital Safe for you. The Digital Safe service is configured at the main organization of your enterprise and applies to all sub-organizations.

What information does Movius need to set up Digital Safe?

- Destination directories for the metadata CSV files and any audio recording files sent by Digital Safe.
 - There can be separate directories for Voice Call and SMS recordings/WhatsApp messages.
 - These directories can even be on different SFTP servers.
- An SFTP server and the following SFTP access information:
Note: provide separate access information for audio and text transfer. Additionally, use a timeout of 6 minutes to allow for the transfer of large audio files.
 - SFTP username.
 - SFTP password or shared SSH key.
 - SFTP server destination directory.

Note: Movius also offers a separate option to integrate with customer's recorders with a live recording integration model, based on SIPREC. This can run parallel with Digital Safe for a subset of customer organizations.

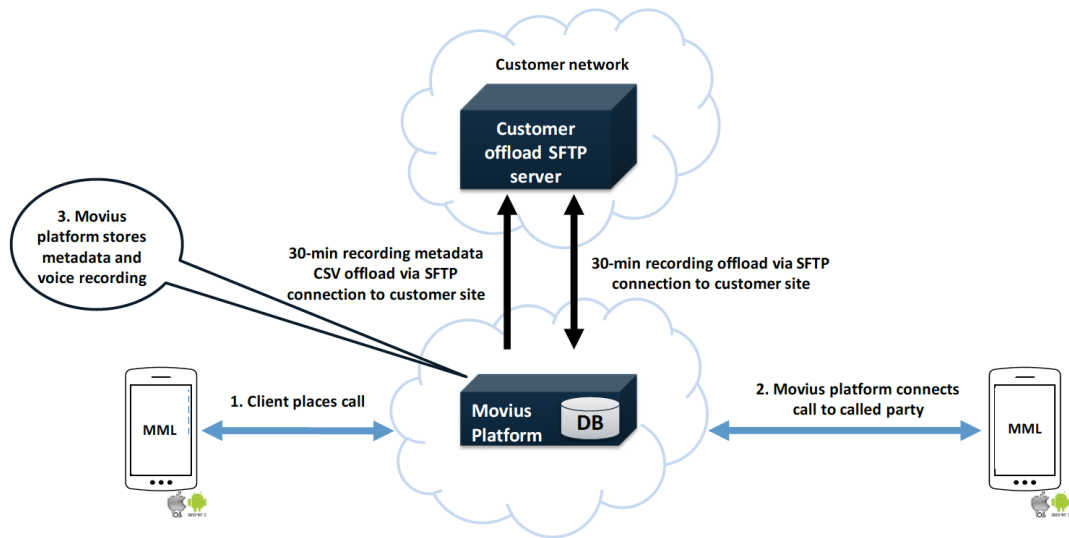
Offload flow

The Digital Safe SFTP Offload solution uses secure SFTP connections to periodically push recordings into a customer provided SFTP server where an intermediary can retrieve for integration with the customer archiving platform.

The content transferred over the SFTP connection consists of:

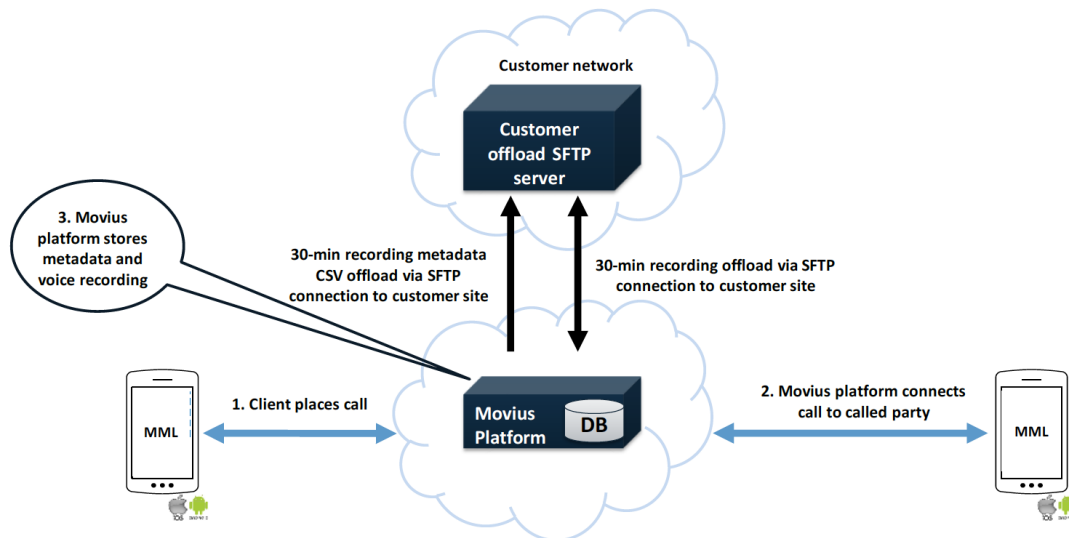
1. For voice:

1. CSV files with metadata and audio files (WAV) with the content.
2. Transfer is scheduled every 30 minutes.



2. For SMS:

1. CSV files with metadata and the content.
2. Transfer is scheduled every 24 hours.



3. Once the information is transferred, the Movius platform will purge the audio recording file, wiping it clean before deleting.

Digital Safe File Formats

The format archives monitored audio and message recordings, with voice and messages in separate delivery events (separate files under separate schedules) and with separate .CSV files for Voice and Messages. A zero-byte file is generated in the event no content is available to archive. There is an option to generate just audio, just text of both file types.

Delivery Method: SFTP

Zero Length File Generation (File generated if there is no content in the interval): Yes, when no rows are found using this format, a zero-row file will be sent.

Separate CSV files for Voice and Message recordings: Yes

Provides Message recordings: Yes

Support for Voice Call Recordings: Yes

Audio File Delivery: Yes

Message File Delivery: Yes

SMS Filename Format: monitored_call_archive_YYYYMMDD__UUID.csv

WhatsApp Message Filename Format: monitored_call_archive_YYYYMMDD__UUID.csv

Audio Filename Format: monitored_call_archive_audio_YYYYMMDD_HHMMSS__UUID.csv

for both file types, where:

NOTE: All phone numbers in these files are prepended with a '+'. All texts have the newline character ('\n') replaced with ". All double quotes in the Message data will be preceded with an additional double quote.

CSV File Attributes

The following table describes the fields included in each entry in the text and audio csv file.

For audio recordings the media files are also sent to the server. Media file names contain a unique identifier:

r_.wav

for example:

r_7dddacca-bf0d-493c-aa7c-1015a457a40e.wav

Media files use G.711 u-law 8-bit encoding.

The audio CSV file will contain the name in the 'body' column so that the CSV meta data and the media file can be associated.

Attributes included in CSV File Entries:

Sample SMS CSV File

Digital Safe format begins with the "Count" of the number of entries, followed by the header information defining the field layout and the entries.

```
#COUNT:1
"SID","Name","Email Address","Type of Message","To (Number)","To (Name)","To (SID)","To (Email)","From (Number)","From (Name)","From (SID)","From (Email)","Body","Message Time (UTC)","SMS Unique ID"
"", "MJ_Hiremath", "mj.hiremath@moviuscorp.com", "Outgoing", "+12567335228", "MJ_Hiremath", "", "mjshiremath@gmail.com", "+12567335223", "MJ_Hiremath", "", "mj.hiremath@moviuscorp.com", "Hi, How's it going?", "2018-10-08 12:01:55.120", "11b21371-ab97-4a28-b963-dbe3e6690cf0"
```

Sample WhatsApp Message CSV File

```
#COUNT:1
"SID","Name","Email Address","Type of Message","To (Number)","To (Name)","To (SID)","To (Email)","From (Number)","From (Name)","From (SID)","From (Email)","Body","Message Time (UTC)","SMS Unique ID"
"","MJ_Hiremath","mj.hiremath@moviuscorp.com","OUT- WhatsApp Message","+12567335228","MJ_Hiremath","", "mjshiremath@gmail.com","+12567335223","MJ_Hiremath","", "mj.hiremath@moviuscorp.com","Hi, How's it going?","2018-10-08 12:01:55.120","11b21371-ab97-4a28-b963-dbe3e6690cf0"
```

Sample Audio CSV File

Digital Safe format begins with the “Count” of the number of entries, followed by the header information defining the field layout and the entries.

```
#COUNT:1
"SID","Name","Email Address","Type of Message","To (Number)","To (Name)","To (SID)","To (Email)","From (Number)","From (Name)","From (SID)","From (Email)","Body","Message Time (UTC)","SMS Unique ID"
"","MJ_Hiremath","mj.hiremath@moviuscorp.com","Outgoing","+12567335228","MJ_Hiremath","", "mjshiremath@gmail.com","+12567335223","MJ_Hiremath","", "mj.hiremath@moviuscorp.com","r_7dddacca-bf0d-493c-aa7c-1015a457a40e.wav","2018-10-05 15:03:55.120","ee533787-623d-4c1e-8f00-6ead31f155de"
```

Digital Safe Performance

Movius deploys Digital Safe processing for voice and messages independently in order to meet differentiated compliance requirements. In this configuration, Movius offloads the Metadata and Message Recording content once a day to the customer's SFTP server. Movius also offloads the Metadata and Call Recording content every 30 minutes to the customer's SFTP server.

Movius recommends that the customer dimension the SFTP servers to accommodate for the Compliance Data Offload from Digital Safe. This allows the solution to offer optimal levels of data offload speed and compliance with regulatory requirements.

Movius deploys our Digital Safe solution behind a 10 Gbps outbound connection to ensure exceptional transfer speed and bandwidth to our Customers. The outbound connection runs at a very low data saturation rate meaning that there is ample connectivity to support the transfer speed and bandwidth demands for Digital Safe usage.

Offload Interval

The Digital Safe offloads follow the audio offload timing of 30-minute intervals. The offload will begin but may not be completed before the next 30-minute interval occurs. In this case, the next batch of offloads will be queued and will start once the first batch has completed. Each offload has unique date, time, and hash information that will allow us to complete the offload to the customer's SFTP location for voice **without any loss of data**.

Digital Safe offloads for Message Recording run once a day and offload to the customer's SFTP location for messages. The Metadata for Message Recording is much smaller than for voice and is processed and transferred in a short period of time.

The Digital Safe offloads will contain WAV formatted audio that ensure the highest level of audio quality in the event that the customer's Compliance team needs to review Employee/Customer conversations. This audio is provided in media files using G.711 u-law 8-bit encoding.

The sizing of the audio files and example transfer times for different transfer speeds are below:

The approximate user sizing based on the number of minutes they use in a 30-minute period are below:

Offload Performance Monitoring

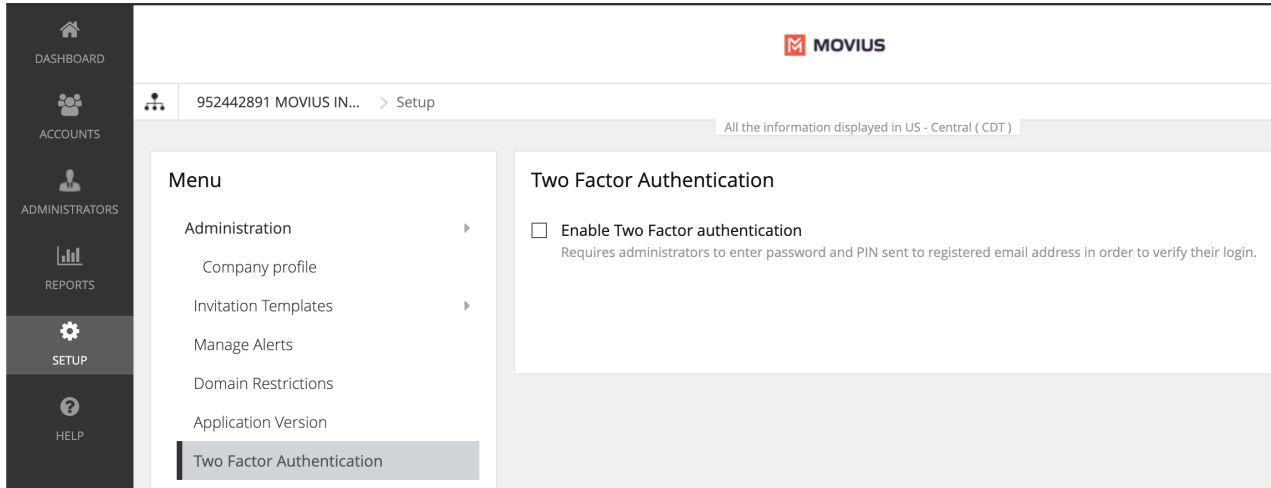
The Movius Digital Safe solution provides information about when it starts, how many audio files it offloads, and when it completed. This information is stored in Movius' observability solution for real-time review and historical analysis.

This information is available to our Operations and Support organizations for monitoring the offload performance and will be made available to the customer in an ad-hoc report as required.

Enable Two Factor Authentication (2FA) for Management Portal Admins

Last Modified on 10/26/2021 3:18 pm EDT

You can enable Two Factor Authentication under Administration in the Setup tab.

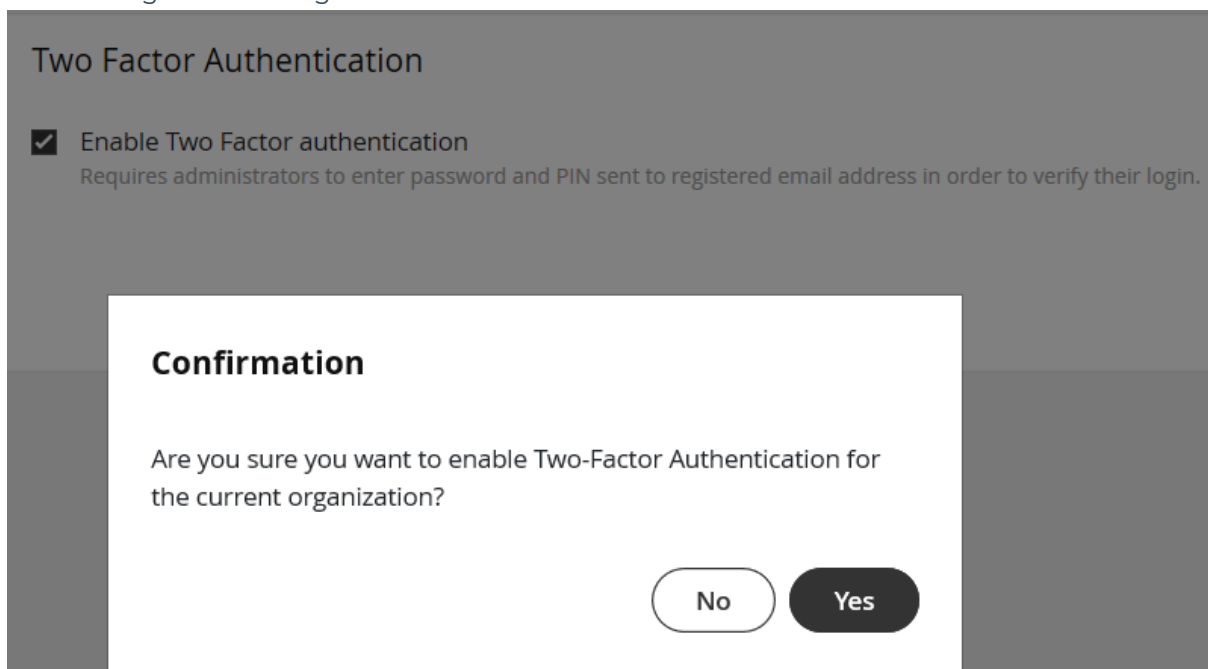


This feature provides an additional layer of security to curtail suspicious login activity. Additional security control is provided by making use of a PIN sent to your registered email ID to log in to the MMP.

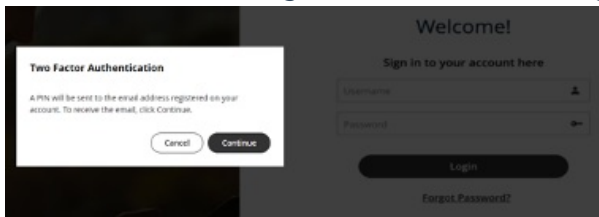
To enable and disable Two Factor Authentication, you must have the Edit privilege for your organization.

Enable Two Factor Authentication for all users in your organization:

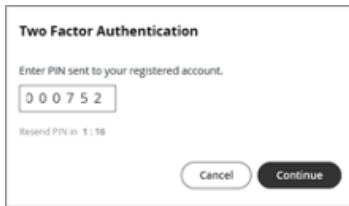
1. Log in to the MMP
2. Navigate to **Setup > Administration > Two Factor Authentication**
3. Click on the checkbox labeled **Enable Two Factor Authentication**
4. Acknowledge the message in the confirmation window



5. Click **Yes** to confirm
6. An authentication PIN will be sent to all users in the organization
7. When a user tries to log in to MMP, the following message pops up:



8. Click **Continue**
9. Check your registered email inbox and copy the PIN received in the email
10. Enter the PIN



11. Click **Continue** to login.

Note

- If you've forgotten the login password, click **Forgot Password**.
 - A pin will be sent to your registered email ID. *Note: If you have not added your email ID, contact your administrator.*
 - You can reset your password using the temporary password sent in the invitation.
 - After resetting the password, you'll be redirected to the login page.
- When you enable Two Factor Authentication for your organization, the 'Forgot Password' feature will no longer work. Users who forget their passwords must request their parent administrator to resend the MMP account invite.

Manage TCPA Opt-In Messages

Last Modified on 10/26/2021 3:19 pm EDT

You can enable or disable opt-in under **Feature Settings** in the **Setup** tab.

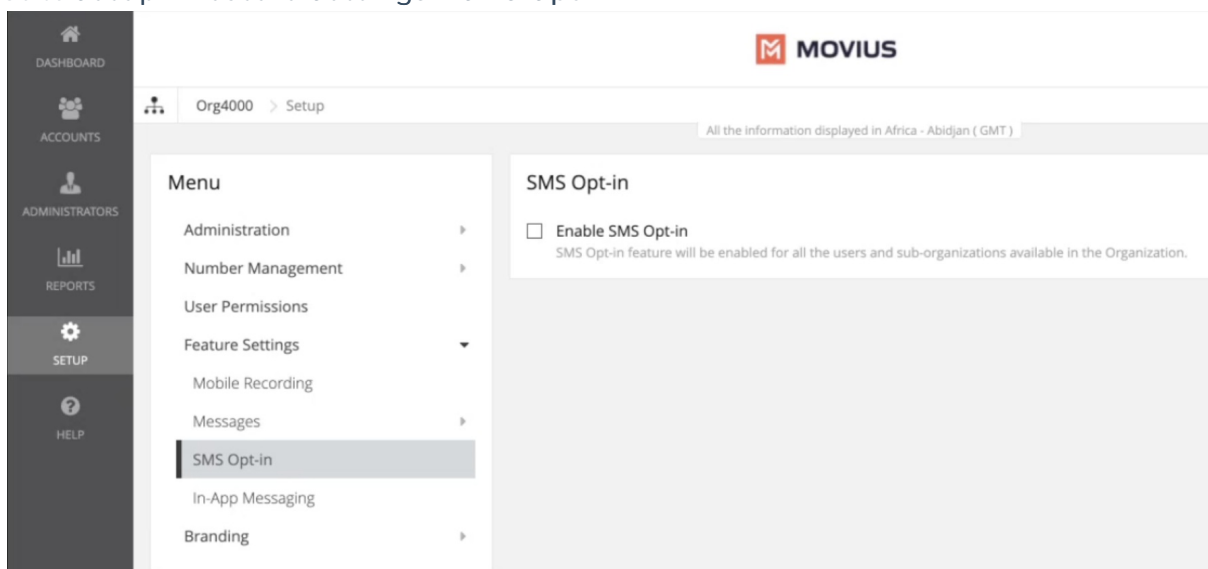
What is Opt-In?

There are regulations in some industries which require that prior to communicating with clients using text messages, the client's consent to receive text messages is requested and captured.

- When the MultiLine user first texts a client, the client will receive a message which allows them to either opt-in to texting by replying "YES" or decline the invitation by replying "STOP" to the text conversation.
- If the client replies "YES", both the MultiLine user and the client receive an auto-generated message informing of the client's decision – and this message is recorded in the Portal/Archival System/Salesforce for compliance verification. The MultiLine user and client can now send each other text messages.
- If the client replies "STOP", the MultiLine user and client will not be able to send each other text messages.
- The automated message in all the YES and STOP cases can be configured through customizable strings.

Enable SMS Opt-in

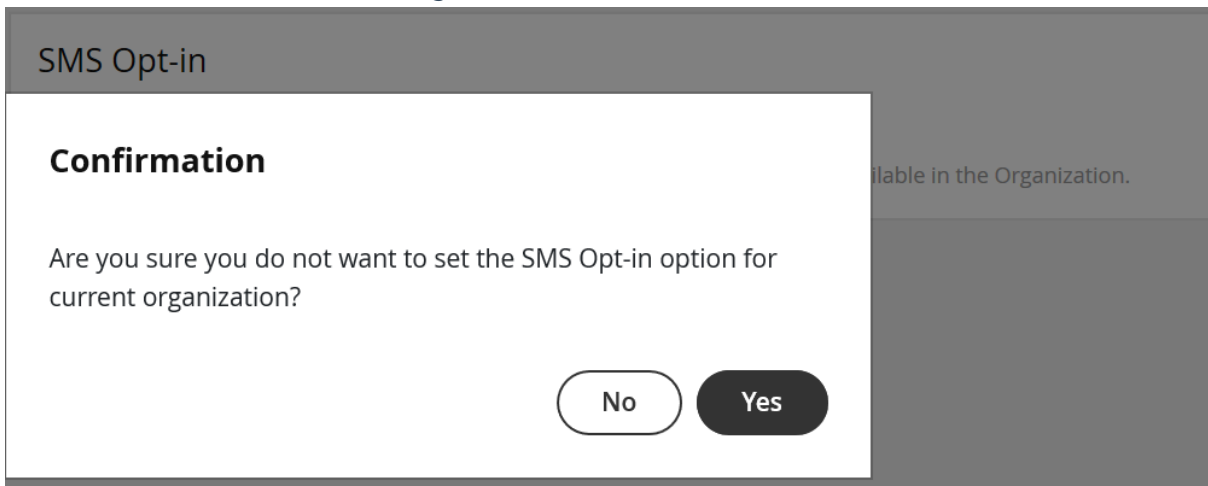
1. Login to MMP
2. Select the relevant Organization/Sub-Organization
3. Go to **Setup > Feature Settings > SMS Opt-in**



If you don't see the SMS Opt-In option in the menu

- To get access to the SMS Opt-In feature, please have your admin team reach out to the Movius Support team to make this change on the organization's behalf.
- SMS Opt-In is configured for the Enterprise Customer by the MultiLine service provider. The Enterprise Customer has an "Organization" dedicated to their account. This organization may have smaller sub-organizations representing the Enterprise Customer's regions, business units, departments, etc. The SMS Opt-In service is configured at the

- main organization of the Enterprise Customer and applies to the entire account.
- 4. Select or deselect the checkbox to enable or disable SMS Opt-In.
- 5. Click Yes in the confirmation dialog



Notice

Group Message and SMS Opt-in cannot be enabled simultaneously.

Group Messages cannot be enabled if the SMS Opt-in is turned ON for the organization, and vice versa.

You can contact your customer service representative to request custom messages to use in the SMS Opt-In feature.

In the scenarios below "XYZ" is a stand in for the name of an Enterprise.

Template Type	Description
SMS Opt-in: SMS Content sent to the customer in case of MT	<p>When a customer initiates the first sms to an XYZ employee, a notification is sent to the customer. The notification is a request to accept or reject the Opt-in process.</p> <p>SMS Opt-in: SMS Content sent to the customer in case of MT</p> <p>Default: [Auto Message] You are trying to reach . As per company policy, you must provide your consent in order for your message to be delivered. To opt in, reply YES. To opt out, reply STOP.</p> <p>Note: Employee name is a variable, and will be picked by the system.</p>
SMS Opt-in: Opt-in requested status notification for MT case	<p>A notification is sent to XYZ employee. This is an information to XYZ employee that a customer is initiating an SMS conversation.</p> <p>Default: [Auto Message] A contact has attempted to send you a message. As per company policy, they have been sent a request to opt in. Once confirmed, you will be able to send/receive messages.</p> <p>When the customer accepts the opt-in request, a notification is sent to XYZ</p>

SMS opt-in: OPT-IN accepted status notification for MT case	<p>employee. This is an information to XYZ employee that they can begin messaging.</p> <p>Default: [Auto Message] Your Contact has opted in. You may continue to send/receive messages.</p>
SMS opt-in: OPT-IN confirmation status notification for MT case	<p>When the customer accepts the opt-in request, a confirmation is sent to the customer. This is an information to customer that they can begin messaging</p> <p>Default: [Auto Message] Opt in confirmed. To opt out at any time, reply STOP. Note: Employee name is a variable, and will be picked by the system.</p>
SMS opt-in: SMS Content sent to the customer in case of MO	<p>When an XYZ employee initiates the first sms to a customer, a notification is sent to the customer. The notification is a request to accept or reject the Opt-in process.</p> <p>Default: [Auto Message] is trying to reach you. As per company policy, you must provide your consent to continue messaging. To Opt in, reply YES. To opt out, reply STOP.</p> <p>Note: Employee name is a variable, and will be picked by the system.</p>
SMS Opt-in: Opt-in requested status notification for MO case	<p>A notification is sent to XYZ employee. This lets XYZ employee that an opt-in request has been sent to the customer.</p> <p>Default: [Automated Message]: Your contact has been sent a request to Opt-in. Once they accept, you will be able to message with your contact.</p>
SMS opt-in: Opt-in accepted status notification for MO case	<p>When the customer accepts the opt-in request, a notification is sent to XYZ employee. This is an information to XYZ employee that they can begin messaging.</p> <p>Default: [Auto Message]: Your Contact has opted in. You may continue to send/receive messages.</p>
SMS opt-in: Opt-in confirmation status notification for MO case	<p>When The customer accepts the opt-in request, a confirmation is sent to the customer. This is an information to the customer that they can begin messaging.</p> <p>Default: [Auto Message]: Opt in confirmed. If you wish to opt out at any time, reply STOP</p> <p>Note: Employee name is a variable, and will be picked by the system.</p>
SMS opt-in: Opt-in rejected status notification for MO	<p>XYZ employee sends an sms to a customer. When the customer rejects an opt-in request or requests an opt-out, a notification is sent to the employee. This is an information to the employee that they will no longer be able to message with the customer.</p>

case	Default: [Auto Message]:Your contact has opted out. No further messages can be sent to this contact until they have provided their consent again.
SMS opt-in: Opt-in rejected status notification to guest for MO case	<p>XYZ employee sends an sms to a customer. When the customer rejects an opt-in request or request an opt-out, a notification is sent to the employee. This is an information to the employee that they will no longer receive messages.</p> <p>Default: [Auto Message]: Opt out confirmed. If you change your mind, please reply with a new message.</p>
SMS opt-in: Opt-in rejected status notification for MT case	<p>A customer sends an sms to an XYZ employee. When the customer rejects the opt-in request or request an opt-out, a notification is sent to the XYZ employee. This is an information to the XYZ employee that they will no longer be able to message with the customer.</p> <p>Default: [Auto Message] Your contact has opted out. No further messages can be sent to this contact until they have provided their consent again.</p>
SMS opt-in: Opt-in rejected status notification to guest for MT case	<p>A customer sends an sms to an XYZ employee. When the customer rejects the Opt-in request or request an Opt-out, a notification is sent to the customer. This is an information to the customer that they will no longer receive messages.</p> <p>Default: [Automated Message] Opt out confirmed. If you change your mind, please reply with a new message.</p>
Opt-in text	The text which is send to accept SMS messages. Default: YES
Opt-out text	The text which is send to terminate SMS messages. Default: STOP

Manage Redaction and Lexicon policies

Last Modified on 10/26/2021 3:20 pm EDT

With Redaction, you can prevent certain kinds of information from being sent or received in text. This works by using a lexicon that identifies strings in outgoing and incoming text messages that contain information that shouldn't be shared. These messages can be blocked entirely, or the message can be sent with only the illegal content redacted.

To set up Redaction, please have your admin team reach out to the Movius Support team to configure it for your enterprise.

You can see whether the Redaction feature is enabled for an organization or sub-organization from the profile menu in the upper right hand corner. Navigate to the organization and then click sub organization from the profile menu.

The screenshot shows the Movius dashboard interface. On the left is a dark sidebar with navigation icons for Dashboard, Accounts, Administrators, Reports, Setup, and Help. The main content area has the Movius logo at the top right and a search, notification, and settings menu. Below the logo, there's a breadcrumb trail: 952442891 MOVIUS IN... > Sales Demo > Deanne Demo > Dashboard. A note states: "All the information displayed in US - Central (CDT)". The dashboard is divided into two tabs: "CURRENT CYCLE" (selected) and "PAST CYCLE". Under "CURRENT CYCLE", the period is "01-May-2020 to 31-May-2020". A table displays usage statistics:

NEW USERS	TOTAL VOICE USAGE (min)	TOTAL MESSAGE USAGE (msgs)	TOTAL DATA USAGE (B)
0	0	0	0

Below the table, there's a section titled "VOICE USAGE FOR THE CURRENT CYCLE" for the period "01-May-2020 to 31-May-2020". A dropdown menu is set to "Voice".

Redaction from a WhatsApp Messaging user

The screenshot shows a WhatsApp chat interface. At the top, there's a back arrow, a contact icon with a redacted name, the name "Elena Jackson", a voice call icon, and a three-dot menu icon. A blue system message reads: "The contact has opted in. You can start messaging with them." Below this, the timestamp "Sep 22, 04:14 PM" is shown. A large black redaction box covers the message content, with white text that reads: "Just wanted to let you know to check your email for some important documents. Please fill them out and".

send back to us as soon as you can.
Let me know if you see it, or need me
to resend it over.

Sep 22, 04:15 PM

Thank you, Melanie I'll take a look now.

Today, 05:27 PM

Just wanted to let you know to
check your email for some important
documents. Please fill them out and
send back to us as soon as you can.
Let me know if you see it, or need me
to resend it over.

Today, 05:28 PM

I see the documents. Can't I just
send you my credit card number? It's



Send message



Redaction in an SMS conversation



Elena Jackson



Today, 08:32 PM

Hi Elena, I've sent over the documents. Please fill them out and I will take care of the trade for you.

Today, 08:34 PM

Melanie, can you just fill them out for me?
My cc number is *****

Send message

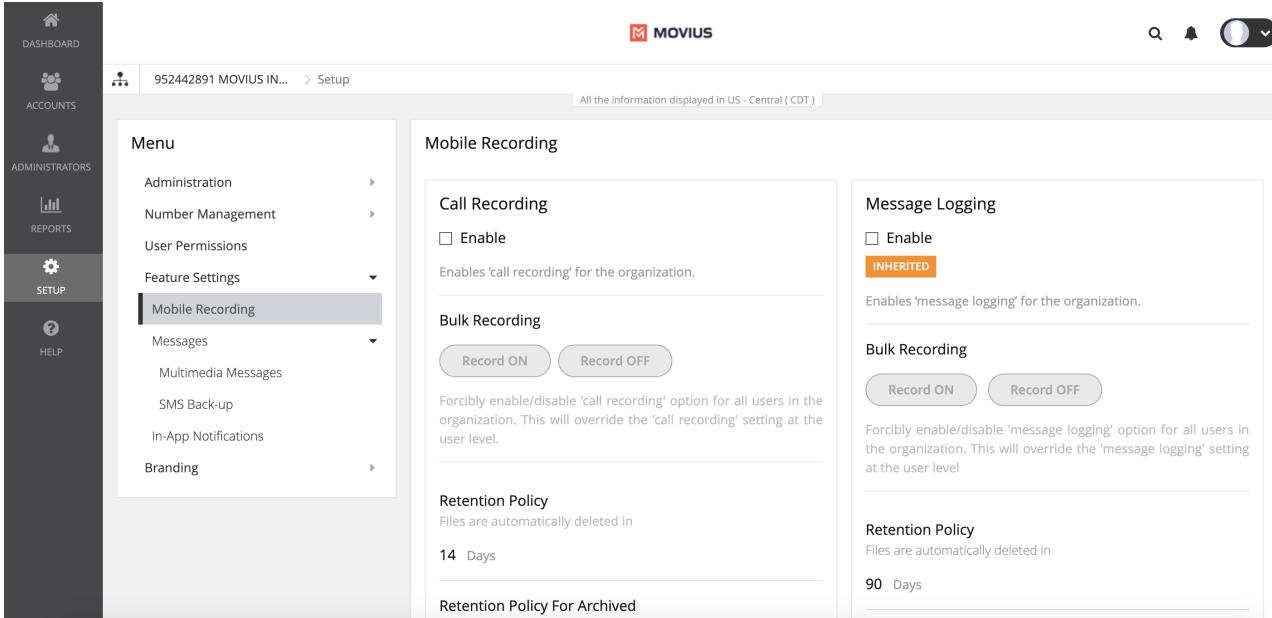




Manage mobile recording settings

Last Modified on 10/26/2021 3:20 pm EDT

You can edit settings for voice recording, text recording, group messaging, and picture messaging in **Mobile Recording** under the **Setup** tab.

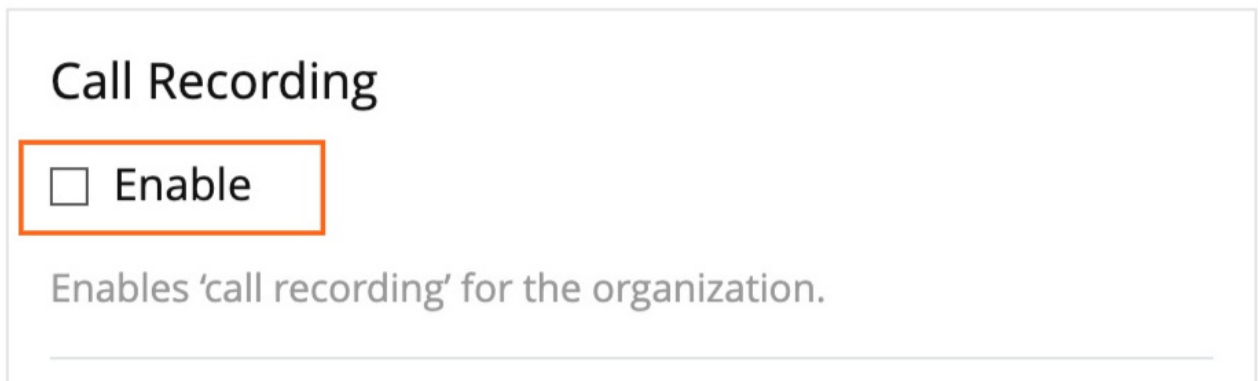


Mobile Recording

Call Recording

All calls will be captured by enabling this option.

Check **Enable** checkbox to enable **Call Recording**.



Message Logging

All messages will be captured by enabling this option. Text, picture, and group messages will be recorded when the feature is enabled.

Check Enable checkbox to enable Message Logging.

Message Logging

Enable

INHERITED

Enables 'message logging' for the organization.

Bulk Recording

Use to forcibly enable or disable call or text capture for all users in the organization. This will override the Call Recording setting at the user level.

- Click the Record ON button to enable recording for all users
- Click the Record OFF button to disable recording for all users.

Mobile Recording

<div><h4>Call Recording</h4><p><input type="checkbox"/> Enable</p><p>Enables 'call recording' for the organization.</p><hr/><h4>Bulk Recording</h4><p>Record ON Record OFF</p><p>Forcibly enable/disable 'call recording' option for all users in the organization. This will override the 'call recording' setting at the user level.</p></div>	<div><h4>Message Logging</h4><p><input type="checkbox"/> Enable</p><p>INHERITED</p><p>Enables 'message logging' for the organization.</p><hr/><h4>Bulk Recording</h4><p>Record ON Record OFF</p><p>Forcibly enable/disable 'message logging' option for all users in the organization. This will override the 'message logging' setting at the user level.</p></div>
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Retention Policy

Retention Policy

Non-editable information for management portal users. You must put in a ticket with your customer success team in order to change the value.

The Retention Policy defines when files will be deleted. For example, if it is set as 14 days, the recorded files are deleted after 14 days. The Retention policy can be different for voice and message files.

Retention Policy for Archived

Non-editable information for management portal users. You must put in a ticket with your customer success team in order to change the value.

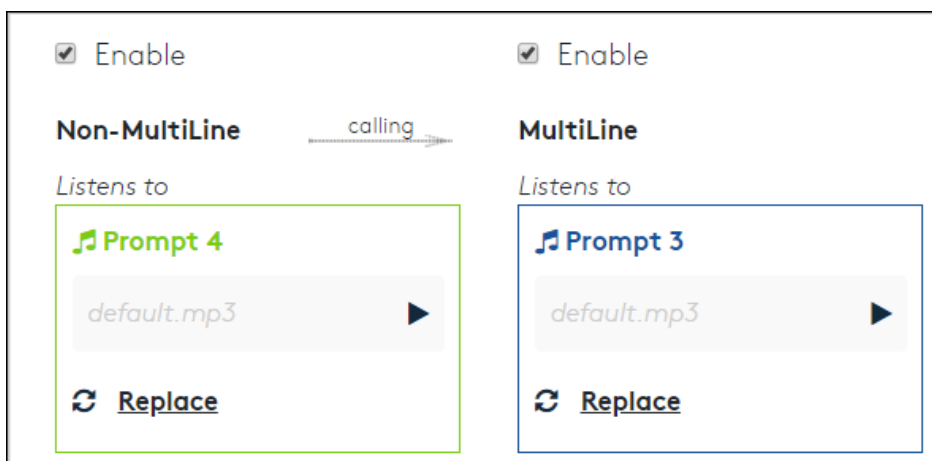
The **Retention Policy for Archived** defines when archived files will be deleted. For example, if it is set as **14** days, the recorded files are deleted after 14 days. The Retention policy can be different for voice and message files.

Announcements

Set Up Announcements

Enables **Voice Prompts** for the call recording. It allows you to upload an audio file that can be played as an announcement for outbound and inbound calls. The audio file formats supported are **WAV** and **MP3**. Different audio files can be uploaded for different call scenarios. A few examples of the prompts that be set up are given below:

- **MultiLine Calling Non-MultiLine:**
MultiLine user hears prompt 1 and Non-MultiLine user will not hear any prompt.
- **Non-MultiLine Calling MultiLine:** The Non-MultiLine user hears prompt 4 and MultiLine user hears prompt 3.



- **MultiLine Calling MultiLine:**
MultiLine calling users will not hear any prompt and MultiLine receiving user hears prompt 6.

Note: If you do not want the user to hear any prompts, then do not select the **Enable** checkbox.

Manage In-App Notifications

Last Modified on 10/26/2021 3:23 pm EDT

Read to learn about sending in-app notifications.

Overview

Problem: A CIO wants to send a yearly reminder to all employees to complete mandatory security training or a manager wants to send a daily reminder to all contractors to submit time sheets.

Solution: In-App Messaging controlled from Management Portal.

- Requires mandatory acknowledgement by end-user
- Helps with compliance reporting of delivery/acknowledgement

Before you Start

- An admin must have "Setup" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal*.

Configure in-app messaging

A user or a group of users view an in-app message when MultiLine is launched. You can configure in-app messaging at the organization level under **Feature Settings** in the **Setup** tab.



By default, the In-App Messaging feature is set as disabled.

The message frequency has four options: Day, Week, Month, and Year.

- **Day:** displays the message once a day.
- **Week:** displays the message for any one day in a week.
- **Month:** displays the message every 1-31 or 1-30. *Note: If the selected date is not available for the current month, then the last day of the month will be selected by default.*
- **Year:** displays for any day of any month of the respective year. *Note: You can't select February 29 as the date and month for the message frequency.*

Enable In-App Messaging:

1. Log in to MMP.
2. Go to **Setup > Feature Setting > In-App Messaging**.
3. Select the checkbox to enable the In-App messaging feature.
4. Enter the message into the **Message Content** text box. *The maximum allowed characters*

are 150 - and this field should not be left empty!

5. In the **Repeat Every** menu, select the message frequency
6. Note the Purge Time Period appear on your screen. *Purge Time Period is just an information display and it is not an editable field.*

Limitations

The In-App Messaging feature has the following limitations:

- When the In-App Messaging feature is enabled, the message will be displayed on the iOS or Android device of the user but will not be displayed on the Web Client.
 - As there is no option to queue the message, the user will not be able to navigate, view, or delete the old messages received.
-

Set allowed applications

Last Modified on 10/26/2021 2:06 pm EDT

Read this to learn how to set the allowed applications for your organization.

Overview

If you're deploying MultiLine, Movius for BlackBerry, MultiLine for Intune, or one of our other integrations, you need to add them to the **Allowed Applications**. You can also set the minimum application version to ensure that user applications are receiving proper security updates and bug fixes.

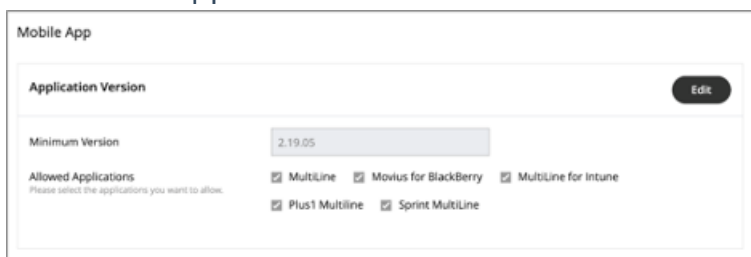
This setting is under **Mobile App** in the **Setup** tab.

Before you Start

- An admin must have "Setup" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal*.

Set Allowed Applications

1. Go to the **Setup** tab.
2. Click **Edit** for **Application Version**.



The screenshot shows the 'Mobile App' configuration interface. At the top, there is a section for 'Application Version' with an 'Edit' button. Below that is the 'Minimum Version' field, which is currently set to '2.19.05'. The 'Allowed Applications' section lists several options with checkboxes: MultiLine, Movius for BlackBerry, MultiLine for Intune, Plus1 MultiLine, and Sprint MultiLine. All checkboxes are currently checked.

- Use the **Minimum Version** field to set the minimum version of MultiLine that users can use.
- Set the **Allowed Applications** by checking or unchecking the box for the items.

You're done!

Users in the organization will now only be able to use the selected apps.

Managing reports for Enterprise-wide MultiLine usage

Last Modified on 10/19/2021 2:50 pm EDT

Read this to understand where you can view how many messages, calls, and data have been consumed by all the users in your organization.

Overview

The Consumption Metrics page will give you an enterprise-wide overview of your organization's MultiLine usage - tracking and graphing the amount of minutes used, messages sent, and mobile data consumed. You can choose to view a number of timeframes, including the current cycle, past cycle, or week by week.

Before you Start

- An admin must have "Reports" Role in the organization to do these instructions. See [What Admin Roles are in the Management Portal](#).

View Enterprise Consumption Metrics

The screenshot shows the MOVIUS Reports page. A dark sidebar on the left contains navigation options: DASHBOARD, ACCOUNTS, ADMINISTRATORS, REPORTS (highlighted), SETUP, and HELP. The main content area is titled 'Consumption Metrics' and features three line graphs. The first graph, labeled 'VOICE', shows 'Incoming (4644)' and 'Outgoing (5242)' minutes from 01-Feb-2020 to 29-Feb-2020. The second graph, labeled 'MESSAGES', shows 'Messages Received (3909)' and 'Messages Sent (3769)' from the same period. The third graph, labeled 'DATA', shows 'Total Data Usage 2017.76 MB'. Red callouts with numbers 1 through 4 are overlaid on the image. Callout 1 points to the 'REPORTS' tab in the sidebar. Callout 2 points to the 'Consumption Metrics' sub-tab in the 'Reports Menu'. Callout 3 points to the 'MESSAGES' graph. Callout 4 points to the 'DATA' graph.

1. Go to the **Reports** tab and then to the **Consumption Metrics** tab in the sub-menu.
2. This will show you your organization-wide voice usage.
3. This will show you your organization-wide message usage.
4. This will show you your organization-wide data usage.

You're done!

Conclude with description of achievement.

Managing reports for MultiLine usage by user

Last Modified on 10/19/2021 2:41 pm EDT

Read this to find out how to pull a report that shows data on a MultiLine user's calls and messages over a certain time period.

Overview

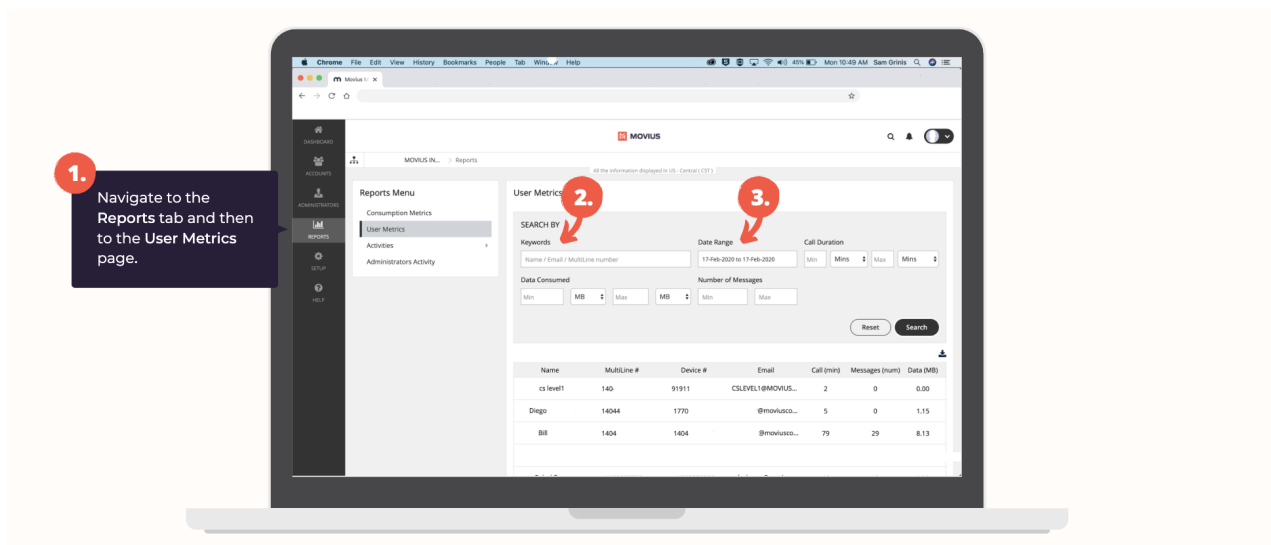
You can pull a user's report in the Management Portal using a wide variety of search criteria including customizable date ranges, user names, or phone numbers.

Before you start

- An admin must have "Reports" Role in the organization to do these instructions. See [What Admin Roles are in the Management Portal](#).

Pull a report for a specific user's MultiLine usage

The User Metrics page gives you an overview of a specific user's MultiLine usage - allowing you to search by name, number, call duration, and more!



1. Go to the **Reports** tab and then to the **User Metrics** page in the sub-menu.
2. Search a **Name**, **Email** or **MultiLine** number to see call and message records for that user.
3. Enter a **Date Range** within you wish to search.

Reports can be exported to Excel in the .CSV format using the small export icon on the top right of the report results page.

Managing reports on MultiLine Admins

Last Modified on 10/19/2021 3:02 pm EDT

Read this to learn how to search, view, and download reports on activities Admins are doing in the Management portal.

Overview

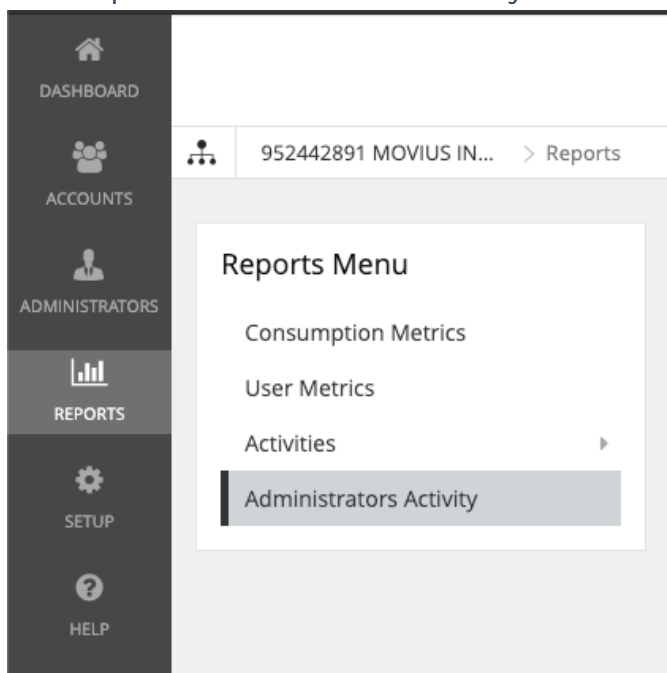
Whenever Admins perform actions in the Management Portal the actions are logged in reports. The **Administrator Activity** page provides a detailed and comprehensive search of all activities performed by Admins in the organization.

Before you Start

- An admin must have "Reports" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal*.

Step 1: Optional Title for Step

1. Go to Reports > Administrator Activity



2. Search by
 - **Date Range**
 - **Activity Type** (by default all are selected)
 - All
 - Portal Access
 - View
 - Write
 - Download
 - **Event Type** (by default all are selected)
 - There are 40 event types corresponding to all the activities administrators can perform in the portal or API.

- Examples: Login, Download Activities, Delete User Account
- Administrator (name or email)
- Organization (name or id)
- Details
 - MultiLine number
 - First and last name
 - Device number
 - User permissions
 - Email address
 - IP Address
 - and more...

Administrators Activity

SEARCH BY

Date Range	Activity	Event Type
<input type="text" value="23-Nov-2020 to 23-Nov-2020"/>	<input type="text" value="All Selected (4)"/>	<input type="text" value="All Selected (40)"/>
Administrator	Organization	Details
<input type="text" value="Enter name / email"/>	<input type="text" value="Enter organization / ID"/>	<input type="text" value="Contains text"/>

Date	Name & Email	Organization	Activity	Event Type	Details
23-Nov-2020 10:41:37	Melanie Allen melanie.allen@moviu...	2334 (952442891 MOVI...	Portal Access	Login	Successful >

3. View the results

- If you search using the **Details** field, searched terms will be highlighted when you expand a result's details

Administrator	Organization	Details
<input type="text" value="Enter name / email"/>	<input type="text" value="Enter organization / ID"/>	<input type="text" value="nancy"/>

Date	Name & Email	Organization	Activity	Event Type	Details
16-Jun-2020 08:15:45	Victoria Reyes victoria.r@abccorp...	Ops Team (1001)	Write	Send Invite	nancy.w@abc... >

First Name	Nancy
Last Name	Wand
Organization	ABC Corporation
Email & Device #	nancy.w@abccorp.com
User Permissions	Default User Permissions (default)
Applications	MultiLine
Number of lines allowed	1
Assign Number	No

In this example search is for 'Nancy'

Only one result found, so list will be expanded
And characters will be highlighted

4. Use the **Download** buttons to save the .CSV file(s)

- This action, like any other you take in the portal, will generate an activity report under your administrator details

Managing reports on MultiLine usage by activity (Voice, Messaging, Data)

Last Modified on 10/19/2021 3:08 pm EDT

Read this to learn how to search, view, and download reports on MultiLine usage by activity, including voice, messages, and data.

Overview

You can view detailed metrics on usage of voice, messages, and data in your organization.

Before you Start

- An admin must have "Reports" Role in the organization to do these instructions. See [What Admin Roles are in the Management Portal](#).

How to pull reports on MultiLine usage by activity

The Activities pages will allow you to search and download MultiLine calls and messages.

1. Go to **Reports** then to the **Activities** page.
2. Choose **Voice, Messages, or Data**.

The screenshot shows the Movius Reports interface. On the left is a navigation sidebar with options: DASHBOARD, ACCOUNTS, ADMINISTRATORS, REPORTS (selected), SETUP, and HELP. The main content area is titled '952442891 MOVIUS IN... > Reports'. Below this is a 'Reports Menu' with options: Consumption Metrics, User Metrics, Activities (selected), Messages, Data, and Administrators Activity. The 'Voice Activity' section is active, showing search filters: Call Type (All calls), Keywords (Name / Email / Device number), Date Range (14-Sep-2020 to 14-Sep-2020), Call Duration (Mins), and Call Mode (All). A table below displays call records:

Date	From	To	Call Quality	Duration (Min)	Call Mode
14-Sep-2020 14:28:38	<13618814970>	Denise Morgan <14702463907>	📞	1	Auto-attendant
14-Sep-2020 14:28:05	<14155054205>	Amutha C <14155059389>	📞	1	TDM

Voice activities

Field

Description of Use

Narrow your search to:

Call Type

- All calls
- Calls received
- Calls sent
- Calls to voicemail
- Dropped calls

Field	Description of Use
Keywords	Search by Name, Email, or Device #
From/To	Narrow your search to calls from or to specific numbers
Date Range	Narrow your search to calls between a start and end date
Call Duration	Narrow your search within a minimum and maximum duration
Call Mode	Narrow your search to TDM or Data calls

Messages activities

Field	Description of Use
	Narrow your search to: <ul style="list-style-type: none"> • All messages • All sent messages • All received messages

WhatsApp enabled organizations

Type	If you're in a WhatsApp enabled organization, you can choose from the following: <ul style="list-style-type: none"> • All messages • SMS sent • SMS received • WhatsApp Messages sent • WhatsApp Messages received
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Keywords	Narrow your search to Name, Email, Device #, or group id
From/To	Narrow your search to messages from or two specific numbers
Date Range	Narrow your search within a start date and end date
Mode	Narrow your search to messages sent over TDM or data

Data activities

Field	Description of Use
Keywords	Narrow your search to Name, Email, or MultiLine number
Date Range	Narrow your search within a start date and end date
Network Type	Narrow your search to Wi-Fi or Data network type
Data Consumed	Narrow your search between minimum and maximum MB or GB consumed
Application	Narrow to MultiLine usage or 3rd party app usage

Enable WhatsApp Messaging for users

Last Modified on 10/31/2021 10:21 pm EDT

Read on to learn how to enable WhatsApp Messaging for users.

Overview

You can enable WhatsApp Messaging by Organization or by User Account.

Before you start

- An admin must have "Setup" Role in the organization to do these instructions. See *What Admin Roles are in the Management Portal*.

Enable WhatsApp messaging for an Organization

1. Log into the MMP.
2. Navigate to the WhatsApp sub-organization.
3. Go to Setup > Feature Settings > WhatsApp Messaging.

The screenshot shows the Movius Management Portal interface. The sidebar on the left contains navigation options: DASHBOARD, ACCOUNTS, ADMINISTRATORS, REPORTS, SETUP, and HELP. The main content area is titled 'WhatsApp Messaging' and includes the following sections:

- Menu:** Administration, Number Management, User Permissions, Feature Settings (expanded), Mobile Recording, Messages, SMS Opt-in, WhatsApp Messaging (selected), In-App Notifications, Branding.
- WhatsApp Messaging:** **Enable WhatsApp Messaging**
WhatsApp Messaging will be available for all users in this organization
- Business Information:**
WhatsApp Business Number: +14049485122
WhatsApp Display Name: Movius MultiLine
- WhatsApp Messaging Templates:**

Key	Value
template_5	Hi! Just wanted to remind you of our meeting tomorrow. Please reply back if you need to reschedule.
template_6	I am trying to follow up on my previous message. I wanted to check if there is any update from you.
template_8	This is to acknowledge your message. We will get back to you as soon as possible.
template_9	This is to notify you that your concern has been resolved. Please reply if you have any questions.

4. Review the details and then check the box to Enable WhatsApp Messaging.

WhatsApp Messaging

Enable WhatsApp Messaging

WhatsApp Messaging will be available for all users in this organization

Inherited Flag

If you see a yellow Inherited label, that means you are in a sub-organization of an organization which has WhatsApp Messaging enabled, and therefore WhatsApp Messaging was enabled its sub-organizations.

You can uncheck Enable WhatsApp Messaging to disable it for the sub-organization. This will disable its sub-organizations as well. Admins of those sub-organizations will then be able to enable it if needed.

WhatsApp Messaging

Enable WhatsApp Messaging INHERITED

WhatsApp Messaging will be available for all users in this organization

Business Information INHERITED

WhatsApp Business Number +14049485122

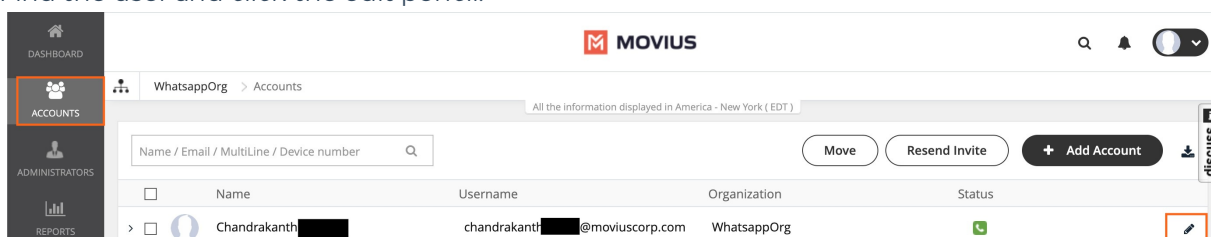
WhatsApp Display Name Movius MultiLine

Onboarding users in the enabled organization will automatically have the WhatsApp messaging feature when they complete their onboarding.

Existing users will see a pop-up in-app letting them know the WhatsApp messaging feature is available for use.

Enable or disable WhatsApp messaging for individual user

1. Log into MMP.
2. Go to **Accounts**.
3. Find the user and click the edit pencil.



4. To enable WhatsApp Messaging switch the **WhatsApp Messaging** toggle to on (green)

checkmark). To disable, switch the toggle to off (grey 'x' mark).

The screenshot shows the 'Edit Line' configuration page for a WhatsAppOrg account. The page is divided into several sections:

- Profile:** MultiLine (164-██████████), User Permissions (COS UAT0 (Default)), Organization (WhatsappOrg), Device # (91-██████████), Language (English).
- Emergency Services:** E911 (checked), 23 Jul 2021, 12:01.
- Usage:** Calls (0 Min), Messages (4 msgs), Data (2.00 MB).
- Features:** Call Recording (checked), Message Logging (unchecked), WhatsApp Messaging (checked), Login Suspended (unchecked), Account Suspended (unchecked).

The 'WhatsApp Messaging' toggle is highlighted with a red box. At the bottom right, there are 'Close' and 'Save' buttons.

5. Click Save.

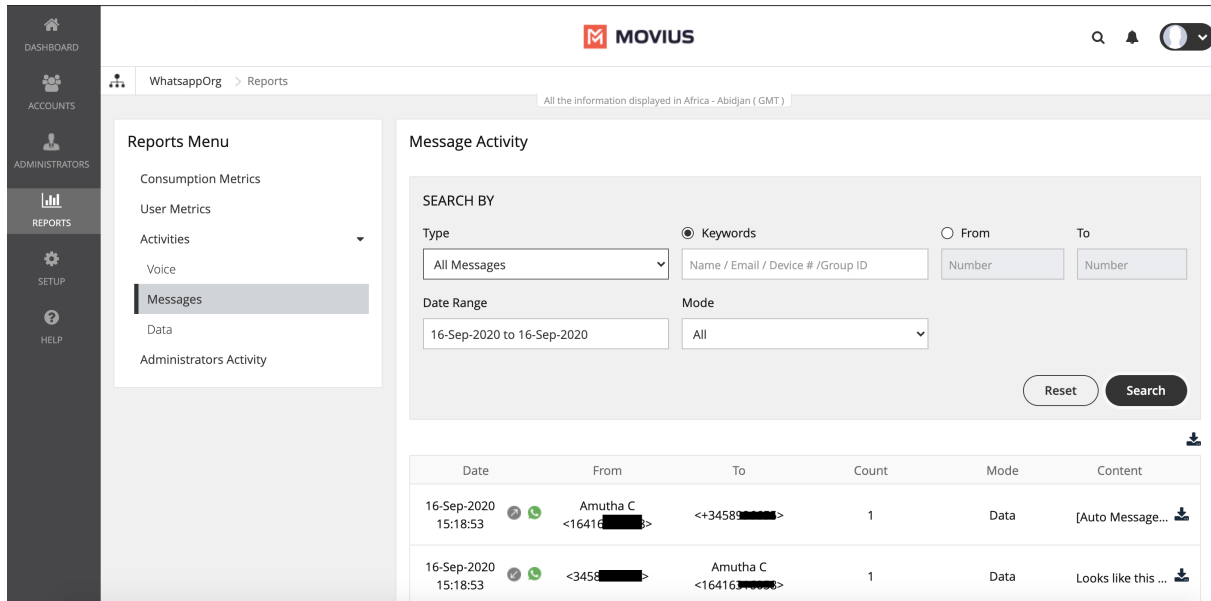
Pull WhatsApp Message Reports

Last Modified on 11/01/2021 8:04 am EDT

You can retrieve your WhatsApp message reports from the Management Portal in Reports > Activities > Messages, just as you would SMS messages.

How to pull WhatsApp message reports

1. Go to Reports then to the Activities page.
2. Choose Messages.



3. WhatsApp messages are indicated by the green WhatsApp icon.

Date	From
16-Sep-2020 15:18:53	Amutha C <16416[REDACTED]>
16-Sep-2020 15:18:53	<3458[REDACTED]>

Messages activities

- Field Description of Use
- You can narrow your search to:
- All messages
 - All SMS messages
 - SMS messages received

Field	Description of Use
Type	<p>WhatsApp messages</p> <ul style="list-style-type: none"> • All WhatsApp messages • WhatsApp messages received • WhatsApp messages sent
Keywords	Narrow your search to Name, Email, Device #, or group id
From/To	Narrow your search to messages from or two specific numbers
Date Range	Narrow your search within a start date and end date
Mode	Narrow your search to messages sent over TDM or data

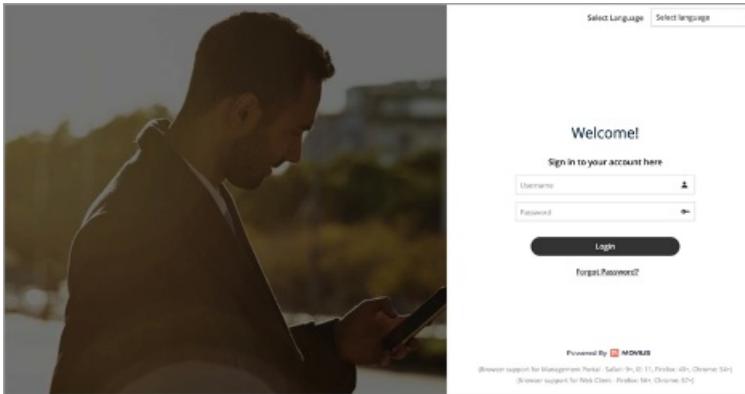
Log into Management Portal

Last Modified on 11/03/2021 7:53 pm EDT

- The Enterprise Administer is a specific user privilege level with a set of user access rights to the various features of the Movius Management Portal (MMP).
- You'll need to contact Movius Support to receive an email containing a portal link and login credentials.

Follow the instructions below after receiving an email from Movius with a link to the MMP, username, and password.

1. Go to your organizations MMP link.
2. Enter the provided username and password and click **Login**



3. Type new password in **Set New Password** and **Confirm Password** and click **Save**

4. When redirected to the MMP Welcome page, enter your username and the password you set to complete logging in

To help reduce unwanted calls, please register your number with the US Government Do Not Call database at: <https://www.donotcall.gov/>

Once you're logged in a tour will begin that will lead guide you to the **Accounts** page and adding your first user.

Is it possible to add multiple administrators to the Management Portal?

Last Modified on 11/01/2021 2:08 pm EDT

Yes. The Enterprise super administrator can **add other Admins**. They can also create and assign Administrator roles with custom privileges and responsibilities.

How do I help a user that loses their Activation password?

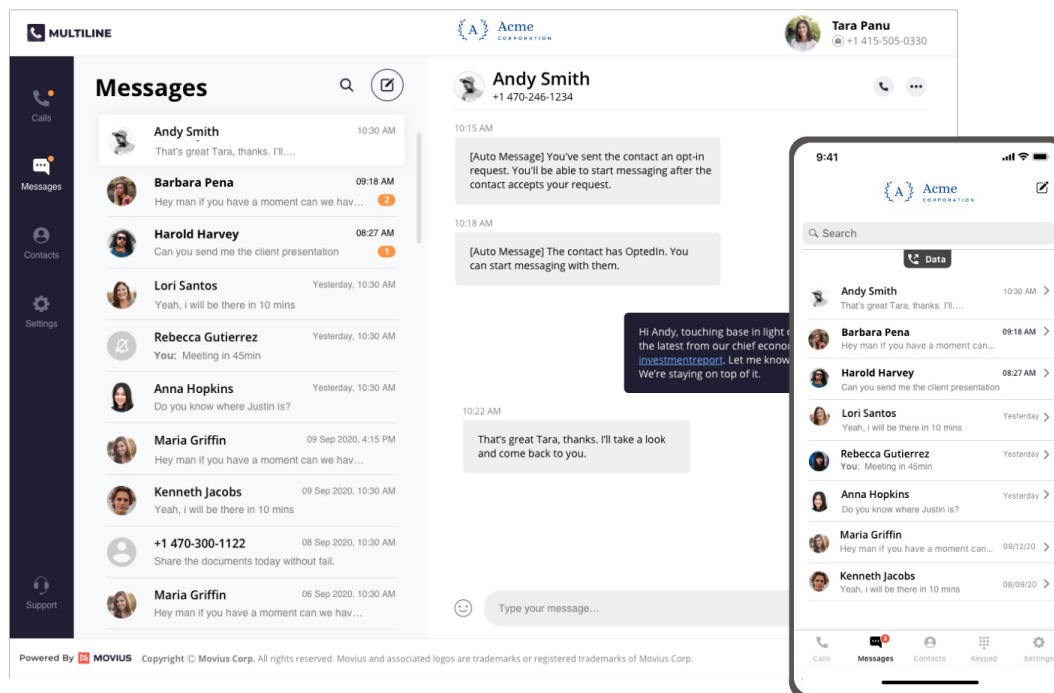
Last Modified on 11/01/2021 2:11 pm EDT

Users receive Activation passwords in their MultiLine invitations. If the user can't find theirs, you can **resend the invitation** to provide them a new one.

Release Notes | MultiLine Desktop | October 3, 2021

Last Modified on 11/03/2021 7:35 pm EDT

On October 3, 2021, we are thrilled to announce we are releasing MultiLine Desktop 1.0.



What is MultiLine Desktop?

About MultiLine Desktop

MultiLine Desktop brings the mobile business calling and messaging features criti...

What's coming next?

The next release of MultiLine Desktop will enable group messaging.

Where can I learn more?

Our Customer Success team is ready to help. MultiLine Desktop is included free in all product offerings and will not cost your organization a penny to enable it for all your MultiLine users.

- User Getting Started Guide is available at <https://help.moviuscorp.com/help/getting-started-with-multiline#get-started-with-multiline-desktop>

- Admin Guide to onboarding users is available at <https://help.moviuscorp.com/help/setting-up-users-to-use-multiline-desktop>
-

Release Notes | App and Server | October 2021

Last Modified on 11/03/2021 5:12 pm EDT

Movius October 2021

Last Updated 10/20/2021 at 11:48 AM EDT

Read on to learn what's new with MultiLine Apps and the Management Portal.

App Update Schedule

- October 5, 2021 | Movius for BlackBerry v. 2.31.01
- October 6, 2021 | T-Mobile MultiLine 2.28
- October 15, 2021 | Movius MultiLine v. 2.31.01
- October 22, 2021 | T-Mobile MultiLine v. 2.31

What's new with all MultiLine Apps

- MultiLine users will notice far less spam calls thanks to the implementation of state of the art STIR/SHAKEN protocol. The service will intercept calls that are likely scam and route them to MultiLine voicemail.

App Issue Fixes

Issue Key	Platform	Released in version	Issue description
CS-231752	Movius MultiLine	v. 2.31.01	MultiLine Activation UI fix: font size
CS-231902	Movius for BlackBerry	v. 2.31.01	Issue preventing Contact Sync
CS-231901	Movius for BlackBerry	v. 2.31.01	Resolved various client restarts
CS-231062	T-Mobile MultiLine	v. 2.28	App crash when transition from WiFi to LTE
CS-231164	T-Mobile MultiLine	v. 2.28	Experienced "Service not available">
CS-231535	T-Mobile MultiLine	v. 2.28	iOS - Poor network indicator started and persisted
CS-231597	T-Mobile MultiLine	v. 2.28	"Verify me" was greyed out on invitation screen
CS-231592	T-Mobile MultiLine	v. 2.28	+91 Appended to number on welcome screen
CS-231650	T-Mobile MultiLine	v. 2.28	"No Wifi" message persists when the Wifi and LTE are ON and good
CS-231703	T-Mobile MultiLine	(iOS) v. 2.28.01.39	No WiFi and red dot condition

Changes for Unbranded App:

M2021-T-Mobile
308 MultiLine v. 2.31

- Renamed App from "Sprint" to "T-Mobile" MultiLine in Play and App stores
- Icon on Phone menu:
 - Changed label to "MultiLine"
 - Icon appears as blue/black phone
- About Us screen:
 - Large Movius Logo is replaced by "MultiLine" logo. (Brandable in Management Portal)
 - Small Movius logo below the word "from" is unchanged and the Copyright notice is unchanged.
- Help screen:
 - Knowledge Base link still goes to Movius Help Center
 - In the description UNDER the Knowledge base link, the word "Movius" shall be changed to "MultiLine".
- Contact Name changed from "Movius_Work " to "Multiline_Work"
- Terms and Privacy is unchanged (lists Movius as supplying party)

Server Update Schedule

Site	Start Date & Time	End Date & Time
SNG01	Friday 1-Oct-2021, 12:00 pm EDT	Friday 1-Oct-2021, 5:30 pm EDT
LON02	Friday 1-Oct-2021, 9:00 pm EDT	Saturday 2-Oct-2021, 02:00 am EDT
DAL10	Saturday 2-Oct-2021, 01:00 am EDT	Saturday 2-Oct-2021, 06:00 am EDT
WD_HRC06	Saturday 2-Oct-2021, 01:00 am EDT	Saturday 2-Oct-2021, 06:00 am EDT
DAL12	Friday 22-Oct-2021, 01:00 am EDT	Friday 22-Oct-2021, 06:00 am EDT
SNG01	Friday 22-Oct-2021, 12:00 pm EDT	Friday 22-Oct-2021, 5:30 pm EDT
LON02	Friday 22-Oct-2021, 9:00 pm EDT	Saturday 23-Oct-2021, 02:00 am EDT
DAL20	Saturday 23-Oct-2021, 01:00 am EDT	Saturday 23-Oct-2021, 06:00 am EDT
WDC06	Saturday 23-Oct-2021, 01:00 am EDT	Saturday 23-Oct-2021, 06:00 am EDT

What's new in the Server and Management Portal

- We've improved verbiage in the Management Portal relating to the Retention Policy to help admins better understand the Retention Policy set for the organization and what it means for the data stored on the platform.
- We made enhancements to assist with displaying and managing the dispatchable street address for 911 calls.

- We've made performance enhancements to deliver quicker sign-in to the portal.
- We've made performance enhancements to deliver quicker loading time on the Accounts page.

Server Bug Fixes

- CS-231875 | Server: Moving accounts results in a timeout
 - M2021-308 | DAL10 Server: FAQ renamed from "Movius" to "MultiLine", "Movius Number" to "MultiLine number"
-

Release Notes | Server | September 2021

Last Modified on 11/03/2021 7:36 pm EDT

These release notes outline details of upcoming changes to the Movius Management Portal and server.

Number Status and Actions in Number Management

Management Portal

- In the previous release, we introduced the Number Status feature which provided a robust search of your numbers. Now, administrators will be able to perform actions including moving, reserving, removing and editing reserved tags, and editing Forwarding To numbers directly from the search results on this screen.
 - Use the menu icon in the Action menu to Move and Reserve numbers.
 - Use the pencil icon in the Reserved Tag column to edit the tag. To unreserve, edit and save as a null value.

The screenshot displays the Movius Management Portal interface. On the left is a navigation sidebar with options: DASHBOARD, ACCOUNTS, ADMINISTRATORS, REPORTS, SETUP, and HELP. The main content area is titled 'WhatsappOrg > Setup' and shows a 'Number Status' section. This section has a 'SEARCH BY' area with input fields for 'Number / Tag', 'Series', and 'Organization', and a 'Status' dropdown menu. Below the search area is a table with the following data:

Series	Number	Organization	Status	Reserved Tag	Action
1550	1550011128	Wa_grandchild	AVAILABLE		...
1550	1550011132	Wa_grandchild	AVAILABLE		Move
164	16415488745	Extended Testing Org	RESERVED	sabaresh 2	Reserve

- Learn more: [Number Management](#)

Server Updates Roundup

- Emergency Calls and Messages (US Only):
 - E-911 SFDC:
 - When using MultiLine in the Salesforce Connector, users will be required to grant permission to use their location. Unless the permission is granted, they will not be able to make any outbound calls or texts. Their location data will be used for calling or texting 911 instead of manual entry.
 - When texting 911, users will be appropriately messaged to guide them to using the

feature (example: no group messaging or picture messaging allowed). In the event 911 messaging service isn't available, users are instructed to call 911 instead.

- **Suicide Prevention Hotline (988):** Users will be able to call the 988 short code for the Suicide Prevention Hotline. Calls to 988 will be kept private from SIPREC and MMP reports.
 - **WhatsApp Enablement:**
 - **Messages Routing:** Like SMS and MMS, all WhatsApp messages, including those between MultiLine users, will route through the carrier network for consistency in performing lawful intercept.
-

Release Notes | App | August 2021

Last Modified on 11/03/2021 7:36 pm EDT

Movius August 2021 Release Notes

These release notes outline new features and enhancements to the Movius MultiLine Solution. This release introduces updates to Movius MultiLine, Movius for BlackBerry, and MultiLine for Intune.

Download the latest version of MultiLine apps

- Movius for BlackBerry [Play Store](#) | [App Store](#)
- MultiLine [Play Store](#) | [App Store](#)
- MultiLine for Intune [Play Store](#) | [App Store](#)

Movius MultiLine

- For iOS users, to protect the separation of business and personal, images taken using the camera in MultiLine, or images sent to MultiLine users by MMS will no longer be stored in local folders. *Note: Only MML iOS app had stored images in a local folder.*

Movius for BlackBerry

- We've improved the Contact sync experience leading to minimum to no syncing failures
- When users visit their Contact Settings, they'll now see the last time their contacts were synced

MultiLine for Intune Call Quality Enhancements

- Users will see Clearer notifications about the quality of the data connection
- We've made enhancements to call quality to prevent call drops and improve experience when switching between networks
- E911 is now able to use location services to update address for data calls to 911 (US Only)

Issue Fixes

Issue Key	Impacted	Problem Summary
CS-231749	Movius for BB	Incorrect country code prepended in device number field
CS-231734	Movius for BB	No prompt heard
CS-231729	Movius for BB	Unsolicited second contact sync triggered
CS-231716	Movius for BB	No ringback tone for client to guest call
CS-231703	Movius for BB	No WiFi and red dot
CS-231571	Movius for BB, iOS	Incorrect Incoming Receiving Mode after onboarding
CS-231650	Movius for BlackBerry, iOS	"No WiFi" message remains when WiFi and LTE connection is good



Release Notes | Server | July 2021

Last Modified on 11/03/2021 7:37 pm EDT

Movius July 2021 Server Release Notes

These release notes let you know what's new with the Movius Management Solution on the server side.

Site	Start Date & Time	End Date & Time
SNG01	7/23/21, 2:30 p.m. EDT	7/23/21, 7:30 pm EDT
LON02	7/30/21, 10 pm EDT	7/30/21, 4 am EDT
DAL10	7/31/21, 12 am EDT	8/1/21, 6 am EDT

MultiLine Platform Enhancements

- **WhatsApp enablement:** MMP admin can now enable and disable WhatsApp Connector for individual users. Previously, Movius Management Portal administrators only had the option to turn WhatsApp Connector on and off for users at the organizational level.
 1. See [Enable WhatsApp Messaging](#) for users in the Knowledge Base.
- **SMS and MMS Routing:** All SMS and MMS messages, including those between MultiLine users, will now route through the carrier network for consistency in performing lawful intercept.
- **MMS Carrier Support:** Previously, the MultiLine solution was only configured to send MMS messages based on a single carrier systemwide. Now we can route MMS to multiple carriers based on the subscriber's MultiLine carrier. *This update applies to Sprint/T-Mobile customers.*
 1. We have built the server functionality required to move subscribers using one carrier to another. *This update applies to Sprint/T-Mobile customers.*
- **Blocking text to short code numbers:** System administrators can now block subscribers from sending texts to short codes on an organization basis.
 1. Reports will capture that a message sent to a short code was blocked similarly as blocked messages are reported now.
- **Number Management:** We have added functionality to Management Portal and API for pulling lists of Reserved Numbers and added the ability to add or remove Reserved Tags.
 1. You can fetch all Reserved Numbers, or pull the list by country code, area code, exact Tag, or partial Tag (starting with at least 3 characters).
 2. To remove a Reserved Tag using the API, add a Reserved Tag with the null value (empty).

Note: Updated API and System Administrator documentation available on request.

Issue Fixes

Key	Platform	Issue Fixed
CS-231561	All apps	Fixed a back-end issue that caused SMS delivery to fail
CS-231553	All apps	Fixed issue where disabling SMS messaging prevented WhatsApp messaging
CS-231551	Management Portal	Improved UI so that new accounts list uses the full screen to display more users

Release Notes | MultiLine and Movius for BlackBerry | June-July 2021

Last Modified on 11/03/2021 7:38 pm EDT

Movius June-July 2021 Release Notes

These release notes outline new features and enhancements to the Movius MultiLine Solution. This release introduces updates to the Movius MultiLine, MultiLine for Intune, Movius for BlackBerry app and the Movius Management Portal.

Download the latest MultiLine apps Version 2.28

- Movius for BlackBerry [Play Store](#) | [App Store](#) (Target date: July 30th)
- MultiLine [Play Store](#) | [App Store](#) (Target date: July 16th)

Mobile app enhancements

- Clearer notifications about the quality of the data connection
- Call quality updates to prevent call drops and improve experience when switching between networks
- Movius for BlackBerry will abort activation if users deny the Contacts permission during setup
 1. See [Why does MultiLine require access to my Contacts?](#)
- E911 is now able to use location services to update address for data calls to 911 (US Only)

New Features for Management Portal

Viewing Number Status in Number Management

We're introducing a new **Number Status** screen that will be available under **Setup > Number Management**.

- The Number Status screen will have a search panel and a list of numbers in table form
 1. By default, all numbers from the administrator's organization and sub-organizations will appear in ascending order by the **Number** column
 2. Admins can use the **Search by** panel to filter out results based on desired parameters, including:
 - **Number / Tag**: Type a MultiLine number or Reserved tag into the search field
 - **Series**: Select the checkmark for one or more series
 - **Organization**: Select the checkmark for one or more organizations
 - **Status**: Select the checkmark for one or more number statuses
 - **Available**: Numbers that are free to be reserved or assigned to users
 - **Reserved**: Numbers that are tagged to be used for a specific user or role
 - **Assigned**: Numbers that are assigned to users who have been invited
 - **In Use**: Numbers that invited users have used to complete registration
- Admins can reverse the sort order by hovering over a column header and clicking the **Sort** icon
- To learn more on how to use the new feature, see [Admins: Number Status](#) Knowledge Base article

Management Portal Improvements

- Pagination and search functions for the Accounts page have been optimized with backend and frontend changes
- Administrators will be alerted when deleting API users to prevent accidental deletion of these users, which are used to connect the MultiLine application to external applications, such as Salesforce
- Administrators will be restricted from trying to send SMS invites using a Device Number which is the same as any other numbers in the available pool, reserved pool, or associated with another user as an assigned MultiLine number or as a device number
- Previously, Management Portal admins had to configure the same recording settings for WhatsApp and SMS, choosing to capture both or neither, but now they can be managed separately; admins can choose to set only WhatsApp or only SMS to be recorded. *Note: This update only applies to organizations using Format 7.*

Crash Reporting

A consent flag has been added to BlackBerry Work UEM settings to opt-in to sending Firebase crash reports for Movius for BlackBerry apps. We recommend BlackBerry Work administrators to grant this consent so that Movius can use Firebase Crashlytics to diagnose and resolve issues.

Issue Fixes

Key	Impacted	Issue Fixed
CS-231454	Server - MMP, Platform	Admins couldn't delete an organization, receiving error message that users were assigned even though MMP and Service Portal showed no users were assigned
CS-231343	Server - MMP, Platform	Problem with CDR log generation
CS-231535	MultiLine for Intune - iOS	Poor network indicator persisted after network conditions were no longer poor
CS-231516	MultiLine for Intune - Android	"No Wifi, connected over mobile data" message displayed when device was properly connected to Wifi
CS-231592	iOS	Resolved issue where +91 appended to number incorrectly on welcome screen
CS-231615	iOS, Platform	Resolved problem causing app crash leading to call drop during transition from WiFi to LTE
CS-	Movius for BlackBerry	

Key	Impacted	Resolved
231628	iOS	Problem causing call transition issue if WiFi is turned off during call
CS-231623	Movius for BlackBerry - Android	User didn't receive notifications for activity while phone was offline after returning online because they were blocked by firewall
CS-231164	iOS	User experiencing confusing "Service not available" error message after reinvite
CS-231062	Movius for BlackBerry - iOS	Problem causing app crash during transition from WiFi to LTE
CS-230994	MultiLine - iOS	Zombie WiFi condition even though WiFi network was perfect.
CS-231499	Movius for BlackBerry - iOS	UX issue where a user wants to send an SMS message to a contact name that has multiple matches
CS-231597	MultiLine - iOS	Problem causing "Verify me" to be greyed out on invitation screen
CS-231434	Server - MMP, Platform	Alarms regarding a CDRtool DB not available for voicemail_vm
CS-231511	Server - MMP	Fixed Spanish translation on User Permission page
CS-231682	Movius for BlackBerry, Platform	Fixed issue with processing the click-to-dial calls from numbers that were formatted with two '#' at the end causing Webex calls to not work

Release Notes | May 2021

Last Modified on 11/03/2021 5:09 pm EDT

May 2021 Release Notes

These release notes outline new features and enhancements to the Movius MultiLine Solution.

What's New in MultiLine?

Activate MultiLine with QR code or button

It's easier than ever to activate MultiLine. Previously when users install or reinstall MultiLine apps, they needed to manually enter details such as their organization ID, username, mobile number, and password from their invitation.

We've introduced a simpler process that works whether users access their invitation on desktop or mobile phone.

- Use the phone's camera to scan a QR code from an invitation accessed from desktop to automatically download the app and begin activation.
- Tap the button from an invitation accessed by phone to automatically download the app and begin activation.
- During activation, they'll only need to enter their personal mobile number, and their one-time PIN will be automatically detected.



Hi John Smith,
Welcome to MultiLine!

- On your iPhone or Android, tap the button below

Download and Activate

- On your computer, use your phone's camera or QR reading app to scan the QR code below



- To manually activate, click [this](#) link to download the app and enter the credentials below during onboarding

Company ID : MYCT.GHT200
User Name : john.s@gmail.com
Password : GhBf56Xfgt

Thanks,
Team Movius

Powered by MOVIOUS

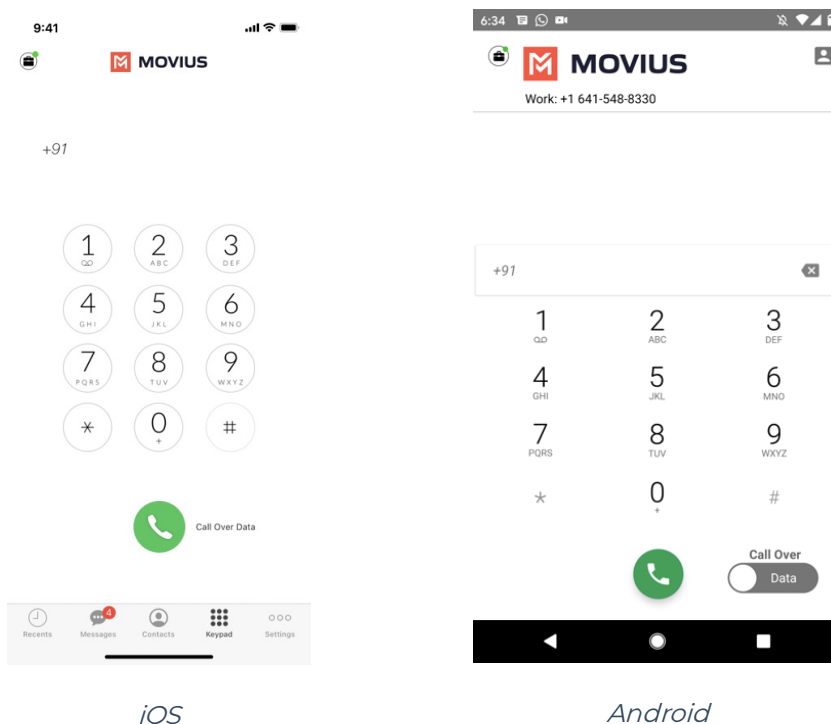
If for some reason users are unable to use the simpler onboarding features, manual entry will still be available.

Simplified Onboarding will be available in all MultiLine and Movius for BlackBerry Android and iOS

More intuitive Call button

Branding colors will no longer be applied to the Call button in iOS and Android applications. We want to match user expectations that a green Call button is used for making a call and red Call button is used for disconnecting a call.

The change will be available in the MultiLine, Sprint MultiLine, and MultiLine for Intune Android and iOS apps with this release.



Below updates apply to all MultiLine applications

MultiLine App-to-MultiLine App call handling improvements

This release changes how it handles calls between two MultiLine users served by the same Movius server instance. Today, such calls are connected within the Movius solution. Going forward these calls will be routed through the carrier networks as other calls between a MultiLine user and a Guest (non-MultiLine) user.

How it works:

- A Call from MultiLine user A to MultiLine user B is treated as a Call from MultiLine user A to a Guest phone number (which is MultiLine user B's MultiLine number. This call routes through

the carrier network serving MultiLine user A's MultiLine number.

- The resulting call to MultiLine user B's MultiLine number is present over MultiLine User B's carrier network as a call from a Guest phone number (which happens to be MultiLine user A's MultiLine number).

Benefits:

- All calls are available within carrier networks for legal intercept. Special routing is no longer required.
- From an Organizational reporting standpoint, all calls are reported in a consistent manner.
- When calls are between MultiLine users in different Organizations, a given MultiLine user's Organization Administrator does not see that the other MultiLine user is also a member of another Organization.
- For billing purposes, all calls are treated in a consistent manner since they all route through carrier networks.

For backward compatibility, the new call handling can be disabled at an organization level.

Block up to 1000 numbers

We have increased the amount of phone numbers that users can add to their blocked numbers list from 50 to 1000. We hope that this will help users defend against unwanted callers and spam callers.

- [Block a Number Knowledge Base article](#)
- [How do I stop Spam callers? Knowledge Base article](#)

What's New in the Movius Management Portal?

Dropped call records added to MMP Reports and CDR Call API

Records of calls that are dropped prior to being answered will be added to the MMP and CDR Call API for detailed call information requests. Previously this information only included answered calls.

Filter for dropped calls added to Voice Activity Reports search

Filter for dropped calls will be added as an option for Call Type in Voice Activity Reports search.

Voice Activity

SEARCH BY

Call Type

- All calls
- Calls received
- Calls made
- Calls to voicemail
- Dropped call

Keywords

From

Call Duration

Call Mode

- [MMP Activity Reports Documentation](#)
- API documentation available upon request.

Improved Accounts page user experience

We've made changes to the Accounts page to be easier to navigate:

- Admins can view information about the number of users and pages
- The current page is highlighted so admins know where they are
- Admins will return to the page they were on after editing records

ABC Bank > Accounts

All the information displayed in US - East-Indiana (EST)

<input type="checkbox"/>	Name	Username	Organization	Status	
> <input type="checkbox"/>	Arthur Obrien	arthur.o@gmail.com	ABC Bank	<input checked="" type="checkbox"/>	
> <input type="checkbox"/>	Kyle Nelson	kyle.n@gmail.com	Whatsapp Org	<input checked="" type="checkbox"/>	
> <input type="checkbox"/>	Emma Johnson	emm.j@gmail.com	ABC Bank	<input checked="" type="checkbox"/>	
> <input type="checkbox"/>	Jeremy Pena	jeremy.p@gmail.com	Complaine Org	<input checked="" type="checkbox"/>	
> <input type="checkbox"/>	Bobby Garza	bobby.g@gmail.com	Whatsapp Org	<input checked="" type="checkbox"/>	
> <input type="checkbox"/>	Kathryn Montgomery	kathy.m@gmail.com	Complaine Org	<input checked="" type="checkbox"/>	
> <input type="checkbox"/>	Brittany Cruz	brit.c@gmail.com	Complaine Org	<input checked="" type="checkbox"/>	
> <input type="checkbox"/>	Linda Rios	linda.r@gmail.com	ABC Bank	<input checked="" type="checkbox"/>	
> <input type="checkbox"/>	Wayne Lewis	wayne.l@gmail.com	Whatsapp Org	<input checked="" type="checkbox"/>	
> <input type="checkbox"/>	Andrew Stephens	andrew.s@gmail.com	Complaine Org	<input checked="" type="checkbox"/>	

Displaying 1-20 of 326 users

...

Issue Fixes

Key Issue Fixed

CS-230772 Server - Non-TP MultiLine MO Data to MultiLine MT Data issue

M2021-546 Server - Native Voicemail Prevention for Inbound Minutes Calls

CS-231356 Server - MMP - Failed to Create administrator on sprint instance

CS-231455 Server - API - list user API related issue DalI0

CS-231452 Server - API - list user API timed out for one customer

CS-231450 Client - Android Intune - Exchange contacts not syncing properly

CS-231361 Client - IOS - Unable to onboard when there is + symbol in username (email ID)

CS-231351 / Client - Movius MultiLine - Cannot call HK numbers

CS-231135

Release Notes | March 2021

Last Modified on 11/03/2021 5:08 pm EDT

Movius Release Notes for March 2021

We have many new features and enhancements we're releasing to the Movius MultiLine Solution to announce.

What's New for MultiLine App?

Access Knowledge Base from the App

Users now have direct access to the [Movius Knowledge Base](#) from **Settings > Help** in the Multiline app and the Movius for BlackBerry app.

Once in the Knowledge Base, type a topic into the search bar to find answers to any question you may have about using the app or browse topics by category.

Note: this feature is not yet available in MultiLine for Intune.

Better Error Messages

When there's an error, we want to make sure you know what's going on and what to do. We reviewed error messages across all our applications and updated them to be more informative and user friendly.

Click-to-Call from Salesforce App using Movius for BlackBerry

Users of Movius for BlackBerry and Salesforce mobile app will be getting an exciting new functionality. Now when users tap any phone number link in the Salesforce mobile app, the call will be placed through Movius for BlackBerry. As usual, Movius for BlackBerry will also detect if there's an associated conference code if dialing into a conference call.

Blackberry SDK 8.1 Update for Android Clients

Movius for BlackBerry will be updated to use the latest Blackberry SDK 8.1. The Blackberry SDK is used by the MML Clients to integrate with Blackberry Dynamics.

[Blackberry released SDK 8.1](#) [external link] in October 2020. The release includes security enhancements, enhanced compatibility with Android SDK APIs, and removal of support for BB SDK 6 and lower.

Geo Redundancy

Movius now supports Redundant Geo sites. Implementing Redundant GEO sites provides protection against catastrophic loss of a single site. In the case that one of the sites is disabled for

maintenance or suffers a catastrophic failure, a combination of a global load balancer and secondary routing in the carrier networks will switch sites so that the service interruption is minimized. This ensures that MultiLine applications will be able to function, including onboarding, calls, messaging, and other activities.

Issues Fixed

iOS App CRs

#	Fixed Issue
CS-231243	IOS: Client freezing and RED Dot conditions
M2021-396	IOS: Persistent red dot condition
M2021-397	IOS: I was on a call and switched out my ear buds but the call went dark
M2021-394	IOS: Calls are not made to the guest number when click to call number has invalid characters passed from Blackberry Work (Click to Dial)
M2021-399	IOS: Copy and Paste did not work properly in the Blackberry Client
M2021-392	IOS: Intune SMS not received when app was closed

Android App CRs

#	Fixed Issue
CS-231272	Android: Apps is constantly crashing
M2021-391	Android: Diagnostic email can't be modified
M2021-398	Android: Diagnostics Report: Call set-up issue over mobile data
M2021-393	Android: When upgrading to 2.23.03.34 the app continues to crash
M2021-405	Android: BB Exchange - Need to support all contact labels that are currently supported by blackberry
CS-231241	Android: Intune-Freezing and crash dialing a contact

Server CRs

#	Fixed Issue
CS-231290	Relationship Number showing in Number Utilization Report
CS-231288	Visual Voicemail Notification issue for Orbic Users
CS-231259	Intermittently MO Data Calls do not connect
CS-231259	Unable to Onboard using Orbic Client
CS-231208	Moving from one org to another creates issues with mess

#	Fixed Issue
CS-231185	MMP – Consumption Metrics Report – Bug
CS-231167	The error for open timeout and read timeout are the same
CS-231154	Alarm regarding CDRTools on Sprint Platform – sls/voicemail

Release Notes | MultiLine for Intune | February 2021

Last Modified on 11/03/2021 5:07 pm EDT

Movius Release Notes for February 2021

We have an exciting feature we're releasing to the MultiLine for Intune iOS and Android apps to announce.

Whats New with MultiLine for Intune?

- The latest release of MultiLine for Intune IOS and Android Clients delivers Click-to-Dial capabilities.
 - Phone numbers in the apps you use for work will render as a clickable phone number
 - Clicking the phone numbers will launch your MultiLine for Intune client so that you can make the call
-

Release Notes | January 2021

Last Modified on 11/03/2021 5:05 pm EDT

January 2021 Release

These release notes outline new features and enhancements to the Movius MultiLine Solution including to our MultiLine Applications, Movius Management Portal (MMP), and API. We have been hard at work implementing new exciting functionality.

What's New?

MMP Enhancements

Administrator Search Details Enhancement

This enhancement allows Administrators to use the Details field to search by MultiLine number, Name, and Device Number and any other values present in the details and detailed information. The searched terms are also highlighted in the results.

In this example search is for 'Nancy'

Only one result found, so list will be expanded
And characters will be highlighted

In this example search is for 'Lori'

Multiple result found, so list will not be expanded

See (next slide) for expansion

List expanded and characters will be highlighted

Deleted Account Tracking

This enhancement will provide an easier and more compliant way to investigate deleted accounts using the Administrator Activity Report. You can now search all the details of the deleted account including name, email, MultiLine number, organization, and more details, similar to what was previously available in reports for added accounts.

Activity Report Enhancement

This enhancement will add information in the MMP CSV report that identifies SMS and WhatsApp messages.

- The column **Message Type** will be renamed to **Message Platform**, and it will include whether the message is on the **SMS** or **WhatsApp** platform.

Add User Permissions to MMP Account CSV List and List User API

This enhancement will add a User Permission column in the MMP CSV report for all users irrespective of the registration status of the user. This will also be added to the List User API.

Suspend Subscribers Using APIs

This enhancement will grant the functionality to suspend MultiLine users from the Modify User Parameter API. The suspended parameter will be added as an optional input parameter which can be **True** or **False**. When set to true, the subscriber is suspended, and when set to false, the user can access the MultiLine application as usual.

API Audit Trail for ADKs

This enhancement will include MMP activities performed using ADK APIs in the Administrator Activity Report. Specifically, the following activities will be included in the audit trail:

- Create a Sub-Organization
- Modify an Organization
- Send Invitation to a New User
- Send a Saved Invitation/Resend Invitation
- Modify User Parameter
- Delete an Invitation
- Delete User

API Enhancements

Changes to credentials shared for Webhook API

Twilio requires credentials for calling the Movius webhook for sending inbound messages and status callback. We previously used the MMP administrator credentials for this purpose.

To meet compliance requirements, this enhancement will ensure the MMP administrator

credentials are private by adding a new admin role specific to Twilio and WhatsApp. Users in this new role can only be added from the Service Portal. The MMP will not show or allow management of users with this new role.

Changes to CDR API output

We will enhance the CDR API output for clearer reporting of SMS and WhatsApp messages in the reports.

- The parameter **Message Type** will be renamed to **Message Platform**, and it will return whether the message is on the **SMS** or **WhatsApp** platform.
- The WhatsApp CDR output will also be enhanced for telemetry and billing purposes.
 1. Updated to differentiate between WhatsApp and SMS
 2. Updated to identify the WhatsApp business number that is used in the user's org (Applies to both inbound/outbound CDRs)

Suspend Subscribers Using APIs

This enhancement will grant the functionality to suspend MultiLine users from the Modify User Parameter API. The suspended parameter will be added as an optional input parameter which can be **True** or **False**. When set to true, the subscriber is suspended, and when set to false, the user can access the MultiLine application.

Add User Permissions to MMP Account CSV List and List User API

This enhancement will add a User Permission column in the MMP CSV report for all users irrespective of the registration status of the user. This will also be added to the List User API.

Digital Safe Enhancements

SMS and WhatsApp

We will enhance the Digital Safe reports for clearer reporting of SMS and WhatsApp messages. These changes apply to Formats 1,4,5,6, and 7.

- The **Message Platform** column will be added.
 1. Message Platform column will return **SMS** or **WhatsApp**.
 2. The **Type of Message** column will return either **Incoming** or **Outgoing**.
- A new column at the end of the data will be added named **Business Identifier**.
 1. This will include the **WhatsApp business number** for WhatsApp messages and will be left blank for SMS messages.

Format 3 update for SMS Journaling via e-mail

This enhancement is for those that use Source One as an SMS Journaling partner. This format archives conversations that involve recorded users. The Source One system receives journals by email. There will be changes made to Format 3 to make it suitable for this purpose.

Format 4 update for Audio CSV (FTP Option) to match HS

This enhancement brought uniformity to file naming format between FTP and HS methods.

MultiLine Application Enhancements

Expose URL schemes to invoke Movius app

This enhancement makes it so that Salesforce Mobile users can click on phone numbers and have MultiLine make the call instead of their native dialer.

This feature can extend to any third-party apps with valid or pre-approved tokens. This feature will be paid and will be controlled at the organization and system level.

Bug Fixes Summary

CS-230841 SMS: SMS messages stuck in SMS transactions table (auto messages to alphanumeric guests) and cannot delivered

CS-230796 SMS: Messages stuck in SMS transactions queue (MMS/emails) (Duplicate of CS-230841)

CS-230877 SMS: When sending a message to a user who has special characters in their name the message is not immediately sent to the client

CS-230900 SMS: Dropped an outbound message and was not retried.

CS-230840 ADK/API: ADK is generating 503 Service Unavailable Errors when the user line does not exist.

CS-230815 ADK/API: Changes made using Movius APIs are not captured in MMP reports

CS-231020 ADK/API: Customers are unable to retrieve CDR data for certain periods using the REST API

CS-231029 ADK/API: Customers are unable to retrieve CDR data having special characters for certain periods using the REST API

CS-231095 MMP: Customer reported long delay when trying to fetch MMP reports from US system

CS-230389 MMP: Hide unsupported Languages in MMP

Digital Safe: Format 4 in Digital Safe CSV file does not have
CS-230838 timestamp in filename

Lassen 2 Release Notes | August 2020

Last Modified on 11/03/2021 5:05 pm EDT

Movius Lassen 2 Release Notes

August 2020

These release notes outline new features and enhancements to the Movius MultiLine Solution. These notes will provide details of changes to the MultiLine App and Movius Management Portal.

What's New?

CDR API Enhancements:

This release contains additional parameters in the REST Voice CDR API. These parameters provide additional information that helps more accurately determine the call quality in real time.

New feature - WhatsApp Messaging Connector:

This release contains the WhatsApp Integration into MultiLine. You must have an active MultiLine subscription to activate this add-on feature.

The new WhatsApp Messaging Connector (currently in BETA) allows MultiLine users to send and receive WhatsApp messages directly within the MultiLine App. The user must simply click the new icon which appears on a contact's page, alongside calling and texting icons.

MMP and Digital Safe message reports capture the message data where it is as searchable and exportable in the same way as texts. Organizations can also apply the same opt in and lexicon policies that apply to texts to WhatsApp messages.

Client issues (IOS)

CS-230896 – Fix IOS JPMC: IOS Client - Screen presenting "Phone" instead of "Unknown"

CS-230894 – Fix IOS L2 client - native contact not recreated in certain situations

CS-230879 – Fix IOS Exchange Sync of contacts does not work with a schedule

CS-230889 – Fix IOS JPMC: When onboarding the client allows that user to customize the name presented when making/receiving calls.

CS-230888 – Fix IOS JPMC: Problems in click to dial

Client Issues (Android)

CS-230849 – Fix Android sls_relationship table not cleaned up causing all calls to be diverted to voicemail for that number

CS-230895 - Fix Android 11 not working on Movius for Blackberry on 2.21 version of the client

Server Issues

CS-230867 - Fix Digital-safe SMS upload failure

CS-230838 - Fix DS - Format 4 CSV file does not have timestamp in filename

[Movius Lassen 2 Release Notes.pdf](#)

Lassen 1.1 Release Notes | July 2020

Last Modified on 11/03/2021 5:04 pm EDT

Movius Lassen Release Notes

July 2020

These release notes outline new features and enhancements to the Movius MultiLine Solution. These notes will provide details of changes to the MultiLine App and Management Portal.

What's New?

Enhancement to User Provisioning APIs:

We're enhancing the Movius User Provisioning APIs by adding parameters to set Voice and SMS recording features. Now you can set up these features prior to end-user onboarding.

- Added input and output parameters to **Create Account/Invite User**
- Added output parameters to **Resend Invite**

Additionally, we added parameters to set the number to which calls can be forwarded.

- Added output parameters to **Modify User**

Bug Fixes

The following items are addressed in this release:

Server CRs

- CS-230736: Fix for an issue that caused calls from reported SPAM numbers to divert Voicemail.
- CS-230723: Fix for an issue that caused admins to be unable to download the files/reports from the Management portal. This issue was only observed for Chrome browsers in Chromebooks and Windows PC.
- CS-230533: Fix for an issue that caused the Client to not receive all emojis sent from the Guest in an SMS message.

Server Additional Feature Enhancement:

- CS-230689: Added call and SMS recording flags to invitation API as an enhancement to enable recording for the MultiLine user.

Lassen 1 Release Notes | June 2020

Last Modified on 11/03/2021 5:03 pm EDT

Movius Lassen 1 Release Notes

June 2020

These release notes outline new features and enhancements to the Movius MultiLine Solution. These notes will provide details of changes to the MultiLine App and Management Portal.

What's New?

Design Changes: iOS Push Notification

Movius made necessary design changes to adapt to Apple's new guideline for push notifications. Apple made changes to their notification design with the introduction of iOS13 operating system with Xcode 11. Changes in iOS 13 impacted the Movius MultiLine App with regard to push notifications for inbound SMS & Voicemails; and VOIP calling. To support the newer notification design of iOS 13, Movius platform needs both server changes (released first) and updated iOS MultiLine Apps.

Terms and Conditions Updated

Movius renewed the Privacy policy in the Terms and Conditions. In addition to English, the new Terms and Conditions is also available in Spanish and Portuguese languages. Enterprise can choose to accept the policy on behalf of all its users. In that case, users will not be asked to accept the policy while onboarding.

Reliability Enhancements

The release contains bug fixes and enhanced logging for the call quality parameters of the data calls to help with proactive monitoring of quality.

Bug Fixes

The following items are addressed in this release:

Server CRs

- CS-230684 and CS-230652: Fixed issues in Ruby.
- CS-230666 and CS-230665: Fix to ensure that the Digital Safe wait time configurations are not

overwritten. The configurations are listed in the monitored_calls file.

- CS-230654, CS-230653, and CS-230652: Fixed minor errors in Digital Safe.
 - CS-230590: Fix for an issue, where a reporting discrepancy is found in the call timestamp where a call is made before DST and reports for them are downloaded after DST time.
 - CS-230565: Fix for an issue with 2-Factor Authentication OTP being the same on different production servers.
 - CS-230533: Fix for an issue where Guest sends long SMS including emojis to the client, but the client did not receive all the emojis.
-

MultiLine for Intune Release Notes | June 2020

Last Modified on 11/03/2021 5:03 pm EDT

Movius MultiLine for Intune Release Notes

June 2020

These release notes outline new features and enhancements to the Movius MultiLine Solution. These notes will provide details of changes to the MultiLine App and Management Portal.

MultiLine for Intune

Movius now supports the Microsoft Intune enterprise mobility suite, providing integration with the entire Microsoft ecosystem. Microsoft Intune is a cloud-based service that focuses on mobile device management (MDM) and mobile application management (MAM). Customers manage apps using the Intune console in the Azure portal.

The new application named “MultiLine for Intune” is now available in the Apple App store and Google Play store. The features & behavior are similar to the existing Movius for Blackberry application.

[End user documentation](#) and instructions for administrators [to add MultiLine for Intune as an allowed application](#) are available in the knowledge base.

Limitations:

When sharing a log from MultiLine for Intune with customer service by email you need to manually fill out the fields:

- **To field:** Enter your customer support email ID
- **Cc field:** Enter the email ID of anyone who wants to track progress on the issue
- **Subject:** Enter the description of the issue you’re having
- **Body:** Enter the details described below.

To help us assist you, please open the log which is attached to your email and find the following details (use ctrl-F to find “App Name”):

<ul style="list-style-type: none">• App Version• OS Version• Device• Company/Org ID• Virtual Number• Inbound/Outbound Call Mechanism	
---	--

```
already logged in for ID:14702463738
[11/06/20, 3:09:50 PM MultiLine] -
[SettingsViewController reloadVVMTableView:]
SettingsViewController, notification received,
refreshing rows
[11/06/20, 3:09:50 PM MultiLine] -
[SiphonApplication decodeVVMNotificationMessage:]
Refresh for VMgreeting has been called
[11/06/20, 3:09:50 PM MultiLine] -
[SiphonApplication pushConsumptionMethod:] local
notification sent after didReceiveIncomingPush
[11/06/20, 3:09:50 PM MultiLine] -
[SiphonApplication
pushRegistry:didReceiveIncomingPushWithPayload:forT
ype:withCompletionHandler:] used completion voip
push, ios 13 for iOS 11 or later
[11/06/20, 3:09:50 PM MultiLine] +
[FineGrainControlHandler
getBoolInUserDefaults:key:] Bool to return YES for
key allow_line_name_change
[11/06/20, 3:09:50 PM MultiLine] +
[FineGrainControlHandler
getBoolInUserDefaults:key:] Bool to return YES for
key allow_broadcast_calling
[11/06/20, 3:09:51 PM MultiLine] -
[UIViewController(Logging) viewDidLoad] Loading
AboutCustomerViewControlller
[11/06/20, 3:09:51 PM MultiLine] -
[UIViewController(Logging) viewWillAppear:]
Displaying AboutCustomerViewController
[11/06/20, 3:09:51 PM MultiLine] -
[AboutCustomerViewController mailAction:] Clicked
mail button
[11/06/20, 3:09:51 PM MultiLine] -
[AboutCustomerViewController mailAction:] app info
App Name : MultiLine for Intune
App Version : 2.21.03.01
OS Version : 13.4.1
Device : iPhone XR
Company/Org ID : sml
Virtual number : 14702463738
Inbound / Outbound Call Mechanism : DATA / DATA
name: calls - call-secure
Monday : 00:00-23:59
Tuesday : 00:00-23:59
Wednesday : 00:00-23:59
Thursday : 00:00-23:59
Friday : 00:00-23:59
Saturday : 00:00-23:59
Sunday : 00:00-23:59
Last Call MOS : -1.000000
[11/06/20, 3:09:51 PM MultiLine] -
[UIViewController(Logging) viewDidLoad] Load
UIActivityViewController
```



Kaziranga Release 3 | May 2020

Last Modified on 11/03/2021 5:02 pm EDT

Movius Kaziranga 3 Release Notes

May 2020

These release notes outline new features and enhancements to the Movius MultiLine Solution. These notes will provide details of changes to the MultiLine App and Management Portal.

What's New?

CDR Logging Enhancements:

- RTP statistics for every call now contain additional logging of call quality parameters and enhanced logging of error codes and call status that are helpful for telemetry.
- The MOS score calculations reported (for an incoming leg of the calls) have also been enhanced.

Introducing Local Ring-back Tone (RBT) for calls:

- A Ring-back Tone (RBT) is the ringing sound that is played to the calling party when someone makes a call. Typically the carrier network of the called party generates the RBT. From a Sprint/T-Mobile legal/ regulatory perspective, no local RBT must be played for calls.
- The Movius platform uses a Local Ring-back Tone (RBT) for the calling party for inbound/outbound calls in certain scenarios to prevent dead air on the call.
 - When a guest makes a data call to MultiLine number, there is a 2-20 second delay after the guest has placed the call for the MultiLine user's device to ring. This variable delay is caused because the state of the App can affect push notification.
 - In this release, we ensure that the Movius platform does not generate a Local RBT except in this calling scenario. Specifically, the Movius platform will continue to generate a Local RBT only to the guest caller for inbound data calls to a Sprint MultiLine number.
 - The inbound data call scenario will be handled separately in the future release.

Bug Fixes

Key	Description
Server CRs	
CS-230577	Fix for an issue where the RTT value is calculated as zero which results in a false MOS score.

CS-230556	The report does not show any update in the attributes when there is an RTP session reset. Fix will be provided in this release with the report enhancement.
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Kaziranga Release 2 | March 2020

Last Modified on 11/03/2021 5:01 pm EDT

Movius Kaziranga 2 Release Notes

March 2020

What's New?

PBX Integration

This release introduces a new way of using MML.

There are enterprises that have PBX phones today. Movius PBX Integration provides several important capabilities to these users:

- Allows their existing number to be answered on both the PBX phone on their desk and on their mobile device.
- Simultaneous ringing presents calls to both devices at once.
- Users can place calls from the PBX phone or from the mobile device. The called party sees the same calling number no matter which device is used.
- For regulated users, all Movius call recording options are available. Calls are recorded by Movius even if the user is using the PBX desk phone.
- Because Movius offers SMS recording, a regulated user can now send recorded SMS messages with the Movius mobile client. Without this Movius product, regulated users have no way to use SMS from the PBX desk phone.
- In the US, 911 calls can be made from the PBX phone or the Movius mobile client.
- Movius provides Lawful intercept of calls and SMS's for both the PBX desk phone and the Movius mobile client.
- Movius provides regulatory call recording and Lawful Intercept even for calls between two PBX desk phones.

Branding changes for Movius

- Changes to replace Movius' old branding with new done on Movius Management Portal as well as WebClient

What's Fixed?

The following items are addressed in this release:

- CS-230384: Incorrect pending invitation count on Number Utilization Dashboard fixed.
- MMP-6216: Calls forwarded from a number that is recorded, were not being recorded. This is fixed with this release
- Movius Management Portalsession expiry due to illegal entry fixed
 1. MMP-6210: Administrator Activity => Organization

2. MMP-6200: Administrator Activity => Details.
- MMP-6208: Bug in the filter in Administrator Activity fixed.
 - Issues with SMS Calea fixed.
 1. CGB-6658: Duplicate messages.
 2. CGB-6659: Redacted messages.
 - Issues with Call Calea fixed.
 1. CGB-6618: Client to Client Calea when one Client has Calea enabled and other doesn't wasn't looping.
-

Kaziranga Release | February 2020

Last Modified on 11/03/2021 5:00 pm EDT

Movius Kaziranga 3 Release Notes

February 2020

These release notes outline new features and enhancements to the Movius MultiLine Solution. These notes will provide details of changes to the MultiLine App and Management Portal.

What's New?

Movius Management Portal

This release introduces a number of changes to the Movius Management Portal to improve the Admin User experience:

"User Permission" dropdown moved for clarity: The "User Permission" dropdown position has been changed to avoid confusion of having two user permissions in the "Add Account" page. When "Assign Number" is clicked, the original "User Permissions" is replaced with UI to select the Phone number and "User Permission" together.

Previous:

SINGLE ACCOUNT MULTIPLE ACCOUNTS

Add a single account or to import and/or invite users in bulk, please go to the 'Multiple Accounts' tab

First Name * Cynthia User Permissions default user permissions (Default) ⓘ

Last Name * Perez Application(S) * MultiLine

Organization Parent_org_4000 & . . . - ' @ * Number Of Lines Allowed 1 ⓘ Assign Number ⓘ

Email or Device # * cynthia.perez@moviuscorp.com
with country code
(e.g. For U.S: 1xxxxxxxxx)

*By clicking on Invite, you agree that you have obtained permission from recipients to receive SMS notifications through employee or other agreement. Message and data rates may apply.

Cancel Invite

Change:

SINGLE ACCOUNT MULTIPLE ACCOUNTS

First Name * First name Application(S) * MultiLine

Last Name * Last name Number Of Lines Allowed 1 ⓘ Assign Number ⓘ

Organization Org4000 User Permissions ⓘ default user permissions (Default) ⓘ

Email or Device # * Email or device #
with country code
(e.g. For U.S: 1xxxxxxxxx)

*By clicking on Invite, you agree that you have obtained permission from recipients to receive SMS notifications through employee or other agreement. Message and data rates may apply.

Cancel Invite

SINGLE ACCOUNT MULTIPLE ACCOUNTS

First Name * First name Application(S) * MultiLine

Last Name * Last name Number Of Lines Allowed 1 ⓘ Assign Number ⓘ

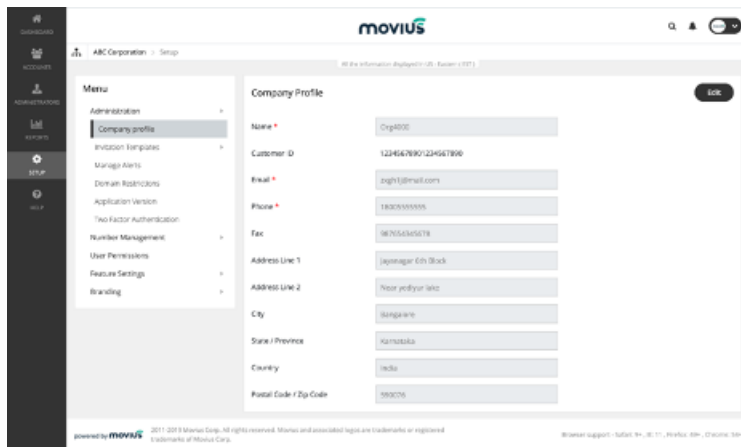
Organization Org4000 MultiLine User Permissions ⓘ Assign number

Email or Device # * Email or device # default user permissions ⓘ Search # or type tag ⓘ
with country code
(e.g. For U.S: 1xxxxxxxxx)

*By clicking on Invite, you agree that you have obtained permission from recipients to receive SMS notifications through employee or other agreement. Message and data rates may apply.

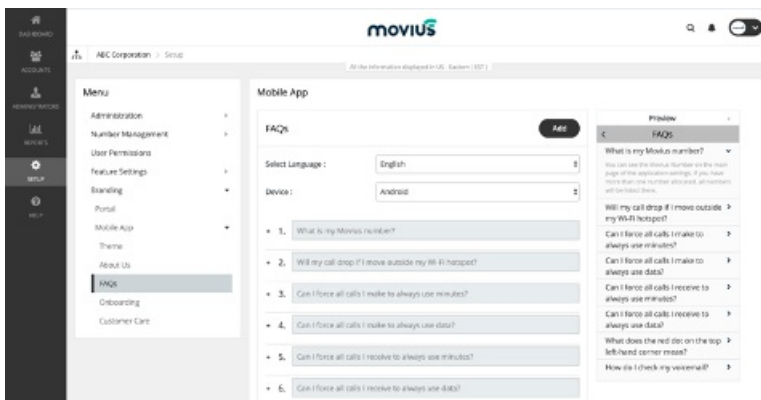
Cancel Invite

Company profile location moved: The Company profile page has been moved to the Setup Menu. The CIDN label has been renamed to: “Customer ID”.



Default for Consumption Metrics: Default time period for the Consumption Metrics has been changed to the “current cycle”.

Editable FAQ available for all the orgs: Frequently Asked Questions section is now available for all the organizations in the MMP. This allows the authorized administrator to view and customize their organization's FAQs.



Account Activity Details: The Account details page in the MMP now shows additional activity information to indicate when the user first logged in / last logged in on the various flavors of the MultiLine solution such as MultiLine Mobile App, Web Client and MultiLine Connector on the Salesforce. The page also gives the version number and instance details of the MultiLine solution.



Add-On SOC and Tagging: This capability is applicable to paid add-on features. There are five paid add-on features that Movius supports today: Voice Recording, SMS Recording, SMS Opt-In, SMS Redaction and Salesforce Connector. The add-ons are associated with specific SOC codes depending on the carrier. The SOC codes are sent to Movius in a feed along with the MultiLine numbers (PTNs) by the carrier. Each of these features require custom configurations to enable the features. For the first four add-ons, Movius Customer Support (CS) will now create separate sub-orgs under the parent org for the Customer. The sub-orgs would be also be configured for the corresponding feature. The PTNs with the add-on SOC would be placed in the respective sub-orgs so that users who are assigned with the PTNs are enabled with the add-on features.

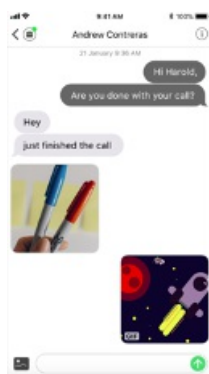
When PTNs are sent to Movius with the Salesforce add-on SoC, the Movius CS will configure the parent org for the Customer with the Salesforce feature and apply a reservation tag to the PTNs called "SFDC". The reservation tag will allow the MMP admin to assign the correct PTNs to end-users who need access to the Salesforce add-on. Detailed flows for the add-on processing are provided separately to the carrier.

Movius MultiLine

International Ringback Tone based on the called party: In case of an inbound data (MT) call, the Movius Platform used to play a standard US ringback tone to the calling party. The Movius platform is now enhanced to play a ringback tone that is dependent on the country of the MultiLine number. For example, if a user calls a Singapore MultiLine number, they will hear the ring back tone that is standard to Singapore.

Client changes update without restart: The MultiLine App is now enhanced to update the changes done by MMP admin without the need of restart of application. For example, if the admin changes the theme of the mobile app, the user's MultiLine will be updated within 24 hours without restart.

Support for .gif files in Picture Messaging: This enhancement to the Picture Messaging feature allows the subscriber to receive and send .gif files along with .jpg, .png, .jpeg formats.



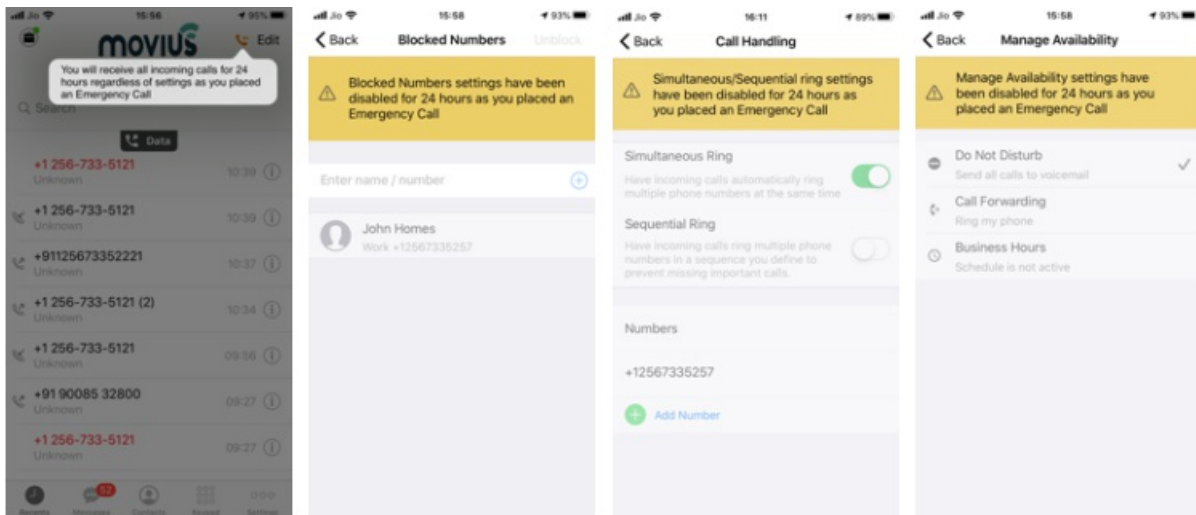
E911 Compliance [US-Only Functionality]: Once a 911 call has been placed from MultiLine, over

data, any features that could restrict emergency responders to call back on that number will be disabled for the next 24 hours. These settings include:

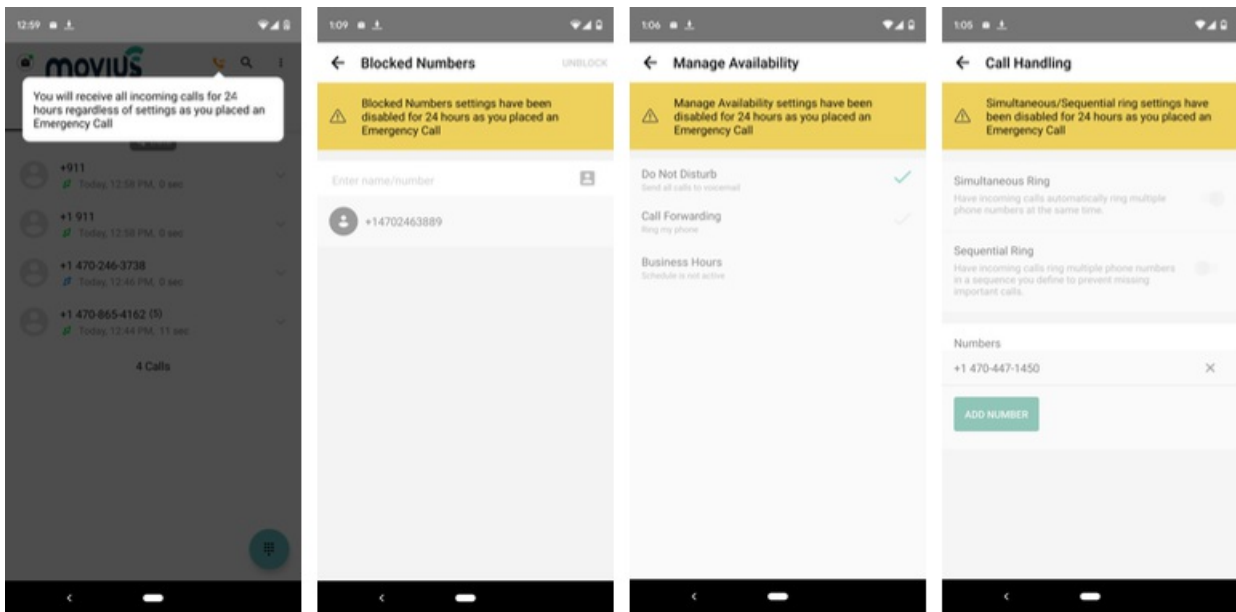
- All Manage Availability settings such as
 1. Business Hours which could restrict the times that MutliLine can accept calls
 2. Do Not Disturb
 3. Call Forwarding
- All Call Handling settings such as
 1. Simultaneous Ringing
 2. Sequential Ringing
- Any blocked numbers
- All SPAM filters that prevent calls from coming through

The user will receive all incoming calls for these 24 hours. However, after 24 hours, settings will reset to what was defined before the 911 call was made. These changes are not applicable if the 911 call is made over minutes because only the native phone number of the user is passed on to the Emergency responders and not the MultiLine number.

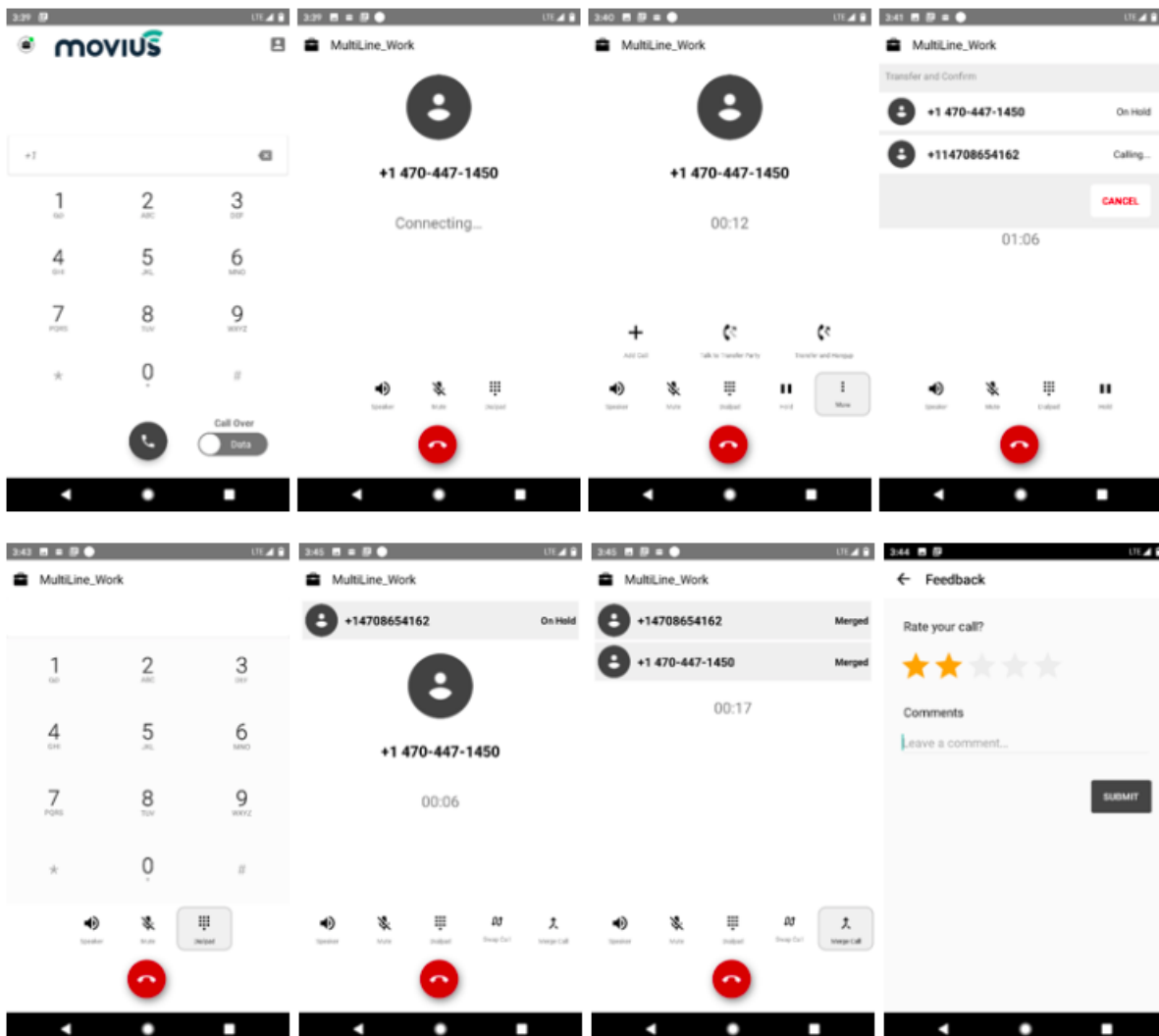
IOS



Android



Android UI Enhancements: Enhancements are made to the Dailer and Call screens for Android. In particular, Incoming VOIP, Outgoing VOIP, Call Transfer, Call Swap and Call merge screens are modified to accommodate alignment, typography and icon changes.



User Provisioning REST API

Today, Voice/Message/Data Activity reports can only be extracted through Movius Multiline Portal. API users can now extract Voice/Message/Data reports of all the registered Movius MultiLine users on their system through a REST API. These reports can be extracted and downloaded as a CSV file via the new REST API.

Note: Please refer to the document REST API User Guide for more details.

Digital Safe Archiving Timers

Two new timers enhance the flexibility of Digital Safe recording store and forward capability. There are now timers for retention of recorded data after it has been successfully been archived. There is a time for recorded voice and another timer for SMS recordings. The purpose of these new timers is to retain archived data as a safeguard in case there was a problem with the archived files after they were archived to the customer's data center. This allows the customer to re-archive the data.

Prior to this feature, archived files were purged (destroyed) during the next daily purge cycle.

Because many customers have privacy concerns regarding retention of data longer than absolutely necessary, the default for these timers is zero. This disables this feature and maintains the earlier functionality of immediately scheduling a purge of archived data.

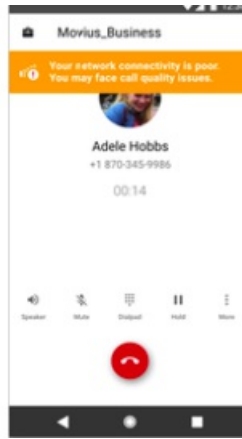
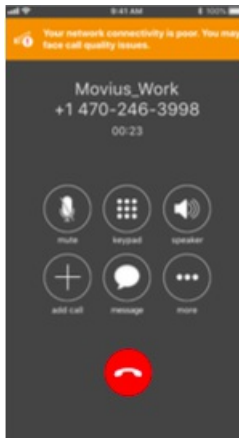
Individual customers that wish to use this feature should open a support ticket that indicates the number of days they wish to retain archived data.

Clients to Support Georedundancy Migration

As part of to rollout of georedundant sites for Movius Multiline solutions in the US market, there is a need to force clients to change their IP routing and/or their set of relationship numbers. A new client capability allows Movius to push a notification to the clients that instructs the clients to request updated primary/secondary IP addresses and updated Relationship Number definitions.

This capability does not affect existing functionality and will be deployed worldwide.

Poor Network Connectivity Indicator



Movius MultiLine will now indicate to the end-user if the network connectivity is poor on the device when a data call is underway. A visual message accompanied by audible beeps will indicate to the user that the network connectivity is poor and hence call quality issues might be experienced.

Bug Fixes

Key	Description
Server CRs	
CS-3917	Fix for an issue where call recording prompt was not heard in some scenarios.
CS-3820	Fix for an issue where the monthly Orbic report did not show all the active lines.
CS-3718	Fix for a customer issue where the MultiLine app onboarding process results in a previously assigned number to be associated with the physical device.
CS-3599	Fix for CDR reporting failures on the UK3 platform.
CS-3837	Server side fix where a software was overwriting the call recording hotfix
Client CRs	
CS-4010	Fix for an iOS issue where incoming mode changed from data to minutes automatically without user input.

CS-3924	Fix for an iOS issue where the SMS sent to the SML App was delayed.
CS-3913	Fix for an iOS issue where there was a delay in message delivery on SML.
CS-3876	Fix for an iOS issue with the Orbic Plus1 App, where the customer was unable to onboard on data and received an error message: "Generic Error".
CS-3866	Fix for an Android issue where if the MultiLine passcode is enabled, the user is always prompted to enter the MultiLine passcode after unlocking the phone, irrespective of which App is being used currently.
CS-3988	Fix for an issue where the Android SML App was not showing the custom logo branding, even if the branding was set correctly in MMP.
CS-3986	Fix for a one-way audio issue while using the Android MultiLine App on a Google Pixel device.
CS-3905	Fix for an Android issue where the back button didn't work to exit out of the SML.
CS-3860	Fix in iOS where the user was unable to copy a number from messages

Joshua Tree Release | October 2019

Last Modified on 11/03/2021 5:00 pm EDT

Movius Joshua Tree-2 Release Notes

October 2019

The pre-release notes outline new features and enhancements to the Movius MultiLine Solution. These notes will provide details of changes to the MultiLine App and Management Portal.

What's New?

Plus1 Multiline now supports multiple enhanced features for individual users.

Number Porting: Plus1 Multiline supports porting of numbers. Users in the US have the capability to port their existing wireline/wireless numbers from any carrier to Plus1 Multiline application. Users can also choose to continue using their ported number within the plus1 Multiline application.

Default State Picker: Plus1 Multiline defaults to New York (NY) state for users during their new employee onboarding. Users have the option to change the state if they do not want a New York number.

Report Enhancement: An updated report, to include activation, expiration and renewal dates of the different plans, will be sent to Sprint and Orbic on a daily basis. This is a change from the monthly report that was shared with Sprint.

MMS Support: Plus1 Multiline supports Multimedia messaging (MMS) and includes picture and group messaging.

Picture messaging: Users can send/receive picture messages that are .jpg, .jpeg, or .png. Both Android and iOS users have ability to take a photo with their camera or select an image from their existing photo gallery.

Additional Notes:

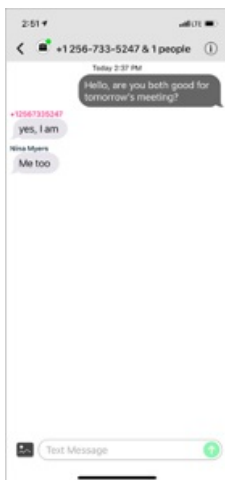
- Picture messaging is only available for customers in the US.
- Granting MultiLine access to your native Photos and Camera is required.
- Picture Messaging is CALEA compliant.
- Videos and other file formats are not currently supported. If a user attempts to send or receive a message containing an unsupported file format, both parties will receive an error.



Group Messaging: Users are able to send / receive messages from a group of participants. (Max of 11 recipients per group message)

Additional Notes:

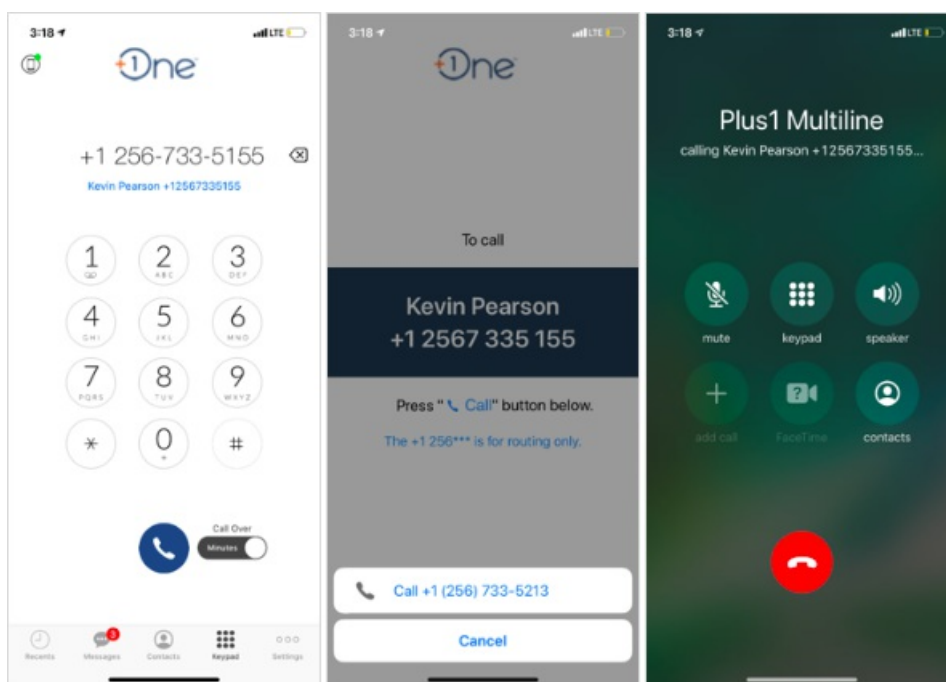
- Group messaging is only available for customers in the US.
- If a participant is removed or added to the existing thread, a new group conversation will be created.



Improvements:

- Android only: The Minutes Overlay was removed, which was displayed whenever the user made/received a minutes call. The call information that was in the overlay will now be shown within the call progress screen.
- Enhancement to iOS and Android message notification banners
- In-App UI Enhancements to iOS and Android
- iOS 13 replaces the popup message while making an outbound minutes call with an action sheet. To complement this change, new background information to guide the user about the action sheet is introduced in the iOS App. This change is applicable only if the user has iOS 13+.

Please see the screenshots below regarding the end-to-end flow while making an outbound minutes call.



Removal of Caller ID in Movius for Blackberry:

Movius for BlackBerry supports a new feature where you can turn off the caller ID to be displayed on the device, when you make an outbound minutes call. By opting/enabling this option, Caller ID will not be saved in the native call logs and native contact. This feature is controlled by Movius. To enable or disable this feature, request must come through Movius support.

Bug Fixes

Key	Description
Server CRs	
CS-3899	Fix an issue with MMS where automated messages are not sent to a guest who sends a video/unsupported file to a MultiLine user (unsupported MMS Media).
CS-3886	Fix an issue where a user, with an 808 area code native number, trying to onboard MultiLine is not receiving OTP via SMS .
CS-3845	Fix for an issue where CALEA is not triggered when MMS is sent from one

	Multiline user to another MultiLine user.
Android CRs	
CS-3819	Fix an issue with the Movius for BlackBerry Android App, where client logs (for issue debugging) could be sent via any App outside the BlackBerry container. With this fix only BlackBerry Work would be able to send the logs from the Movius for BlackBerry App.

Guide: Deploy Movius for BlackBerry using Good Control

Last Modified on 10/31/2021 9:40 pm EDT

This document describes the necessary steps for setting up Movius for BlackBerry to work within a Good EMM environment.

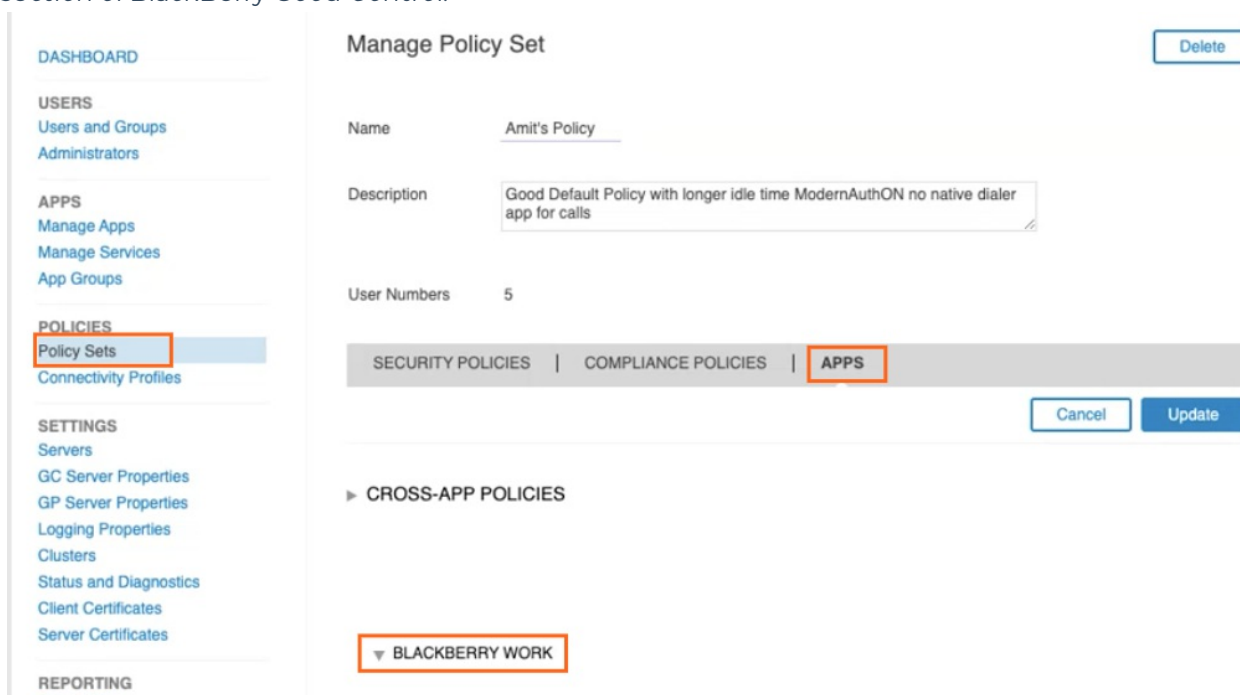
These steps should be performed by the BlackBerry administrator before Movius for BlackBerry MultiLine administrators can begin adding users in the Management Portal and must be performed before users can successfully activate the apps.

Info

Note: This guide covers important settings that allow the Movius for BlackBerry app to work correctly and to ensure your organization is able to enforce your compliance policies. It isn't a complete guide to all settings in BlackBerry Good Control, for that see [BlackBerry Good Control documentation](#).

Step 1: Configure the policy set for Movius for BlackBerry users

For all instructions in this section, you'll be in the Policies > Policy Sets > BlackBerry Work section of BlackBerry Good Control.



Disable use of Native Phone

To prevent users from making calls or SMS on their native phone number and restrict use to Movius for BlackBerry, you need to uncheck the option in the Policy Set:

1. To add or edit a policy set, go to Policy Sets under Policies.

2. On the Manage Policy Set screen, go to Apps >App Specific Policies > BlackBerry Work.
3. Go to the Interoperability tab.

▼ BLACKBERRY WORK



4. In the Voice and SMS categories, deselect permissions to use native phone features and select options to use VOIP apps. *Note: while Movius for BlackBerry is not a VOIP-only app, but this setting allows the app to be used for calls.*



5. Click Update.

Disable Contacts sync to native

Use these settings to control use of **BlackBerry Contacts**. If you allow syncing to device

1. To add or edit a policy set, go to Policy Sets under Policies.
2. On the Manage Policy Set screen, go to Apps >App Specific Policies > BlackBerry Work.
3. Go to the Address Book tab.



ADDRESS BOOK SYNC

4. In the Address Book Sync section.
 1. Deselect Allow syncing BlackBerry Contacts to device. *Note: selecting Allow syncing BlackBerry Contacts to device makes it possible for the native device to contact the BlackBerry Contacts.*
 2. Deselect Allow device to use BlackBerry Contacts for Caller ID.

ADDRESS BOOK SYNC

Allow syncing BlackBerry Contacts to device.

Allow access to the following contact fields:

- | | | | |
|---|--|---|---|
| <input type="checkbox"/> Title | <input type="checkbox"/> Email 1 | <input type="checkbox"/> Email 2 | <input type="checkbox"/> Email 3 |
| <input checked="" type="checkbox"/> Work number | <input type="checkbox"/> Work 2 | <input checked="" type="checkbox"/> Mobile number | <input checked="" type="checkbox"/> Home number |
| <input type="checkbox"/> Home 2 | <input type="checkbox"/> Home fax number | <input type="checkbox"/> Work fax number | <input type="checkbox"/> Other fax number |
| <input type="checkbox"/> Home address | <input type="checkbox"/> Company name | <input type="checkbox"/> Company address | <input type="checkbox"/> Notes |
| <input type="checkbox"/> Radio | | | |

Maximum length for notes field

Even if iCloud is enabled, allow syncing BlackBerry Contacts to device.

CALLER ID

Allow device to use BlackBerry Contacts for Caller ID.

Set up sync to the Exchange Server

Use these settings to allow Movius for BlackBerry to access their Exchange Contacts inside the Movius for BlackBerry app.

Movius for BlackBerry will not upload, store, or transmit the Exchange contacts. The sync will only allow the display and use of the contacts by the user within the app locally.

1. To add or edit a policy set, go to **Policy Sets** under **Policies**.
2. On the **Manage Policy Set** screen, go to **Apps > App Specific Policies > BlackBerry Work**.
3. Go to the **Basic Configuration** tab.
4. Complete the fields for **Exchange ActiveSync Settings**, including **Default Domain**, **ActiveSync Server**, and **Autodiscover URL**. *Note: Completing the Autodiscover URL allows users to sync to the server without manually filling in server details.*

EXCHANGE ACTIVESYNC SETTINGS

Default Domain

Windows NT Domain to try automatically when logging in. If your server uses newer UPN (email@host.com) style login

ActiveSync Server

Specify the default Exchange Server used to attempt to connect. (Example: cas.mydomain.com)

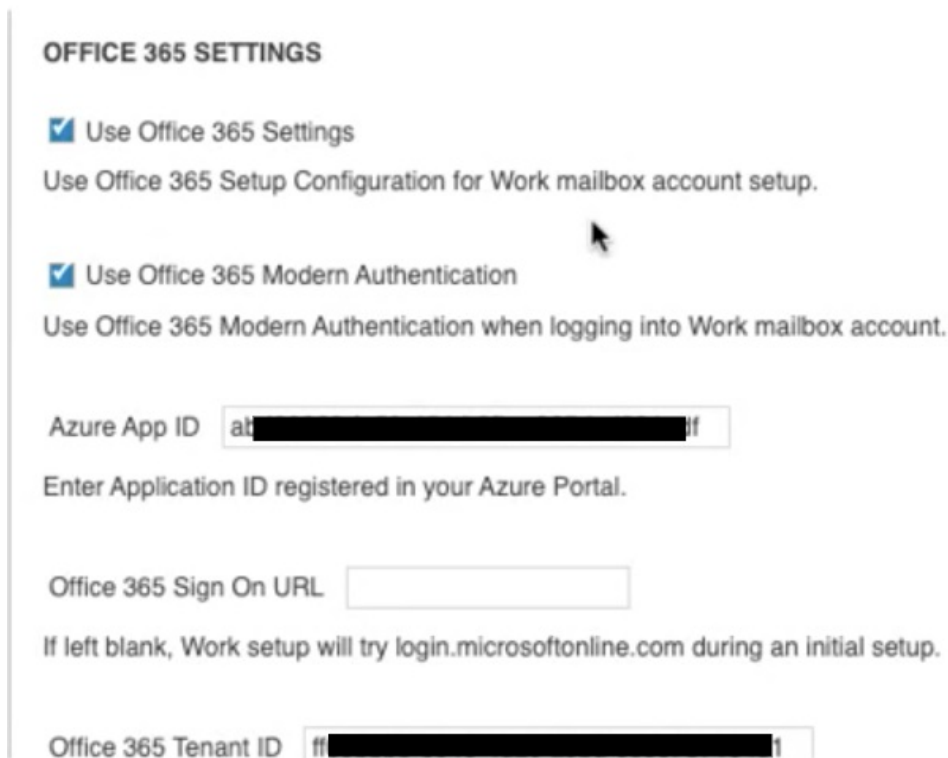
Autodiscover URL

Provide Autodiscover URL if known. This will speed up the Autodiscover setup process. (Example: https://autodiscover.

Set up OTP/Office 365

Use these settings to set up SSO and OTP authentication.

1. To add or edit a policy set, go to **Policy Sets** under **Policies**.
2. On the **Manage Policy Set** screen, go to **Apps >App Specific Policies > BlackBerry Work**.
3. Go to the **Advanced Configuration** tab.
4. Select **Use Office 365 Settings**.
5. Select **Use Office365 Modern Authentication**.
6. Enter **Azure App ID**.
7. Enter **Office 365 Tenant ID**.



OFFICE 365 SETTINGS

Use Office 365 Settings
Use Office 365 Setup Configuration for Work mailbox account setup.

Use Office 365 Modern Authentication
Use Office 365 Modern Authentication when logging into Work mailbox account.

Azure App ID
Enter Application ID registered in your Azure Portal.

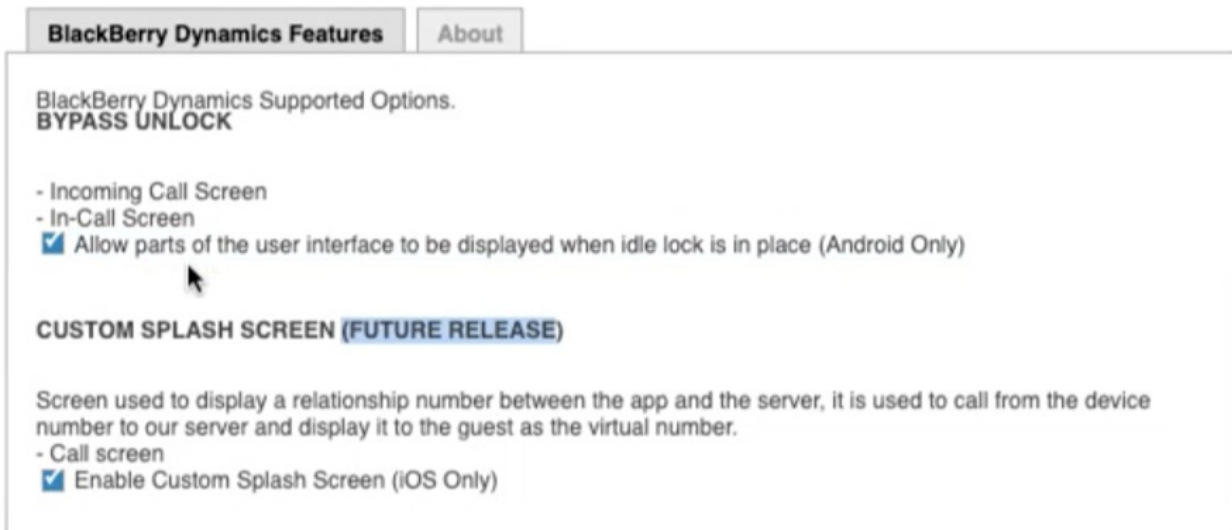
Office 365 Sign On URL
If left blank, Work setup will try login.microsoftonline.com during an initial setup.

Office 365 Tenant ID

Bypass Unlock Splash Screen

Use these settings to make sure that users can see who is calling without authentication.

1. To add or edit a policy set, go to **Policy Sets** under **Policies**.
2. On the **Manage Policy Set** screen, go to **Apps >App Specific Policies > BlackBerry Work**.
3. Select **Allow parts of the user interface to be displayed when idle lock is in place**.
4. Select **Enable Custom Splash Screen**.
5. Click **Update**.



Step 2: Add new users

This step will send an invitation to a user. Adding a Good user requires an email address, a desired App Group, and Policy Set.

Use these steps if the users' email addresses are in the accepted domains. Otherwise use the next steps for [Add custom users](#), instead.

1. Go to Users and Groups



2. Click Add Users



3. There are two ways to add users:

1. If they're in the directory service, import the user by searching their name

Add Users

IMPORT FROM DIRECTORY SERVICE

Search for a user or group in your directory service.

ADD OR IMPORT CUSTOM USERS NOT IN ACTIVE DIRECTORY SERVICE

2. Otherwise, add a custom user

1. Fill in the Email Address, First Name, and Last Name fields, then click **Submit**

Add Users

ADD USER | **IMPORT USERS**

Please type in the new user information below.

Email Address

First Name


Last Name

4. Select from the list to change to the desired policy set. *Refer to BlackBerry documentation for instructions on custom policy sets.*

Manage User

Tara Panu [tarapanu@gmail.com](#)

Policy Set

App Groups **Movius** 

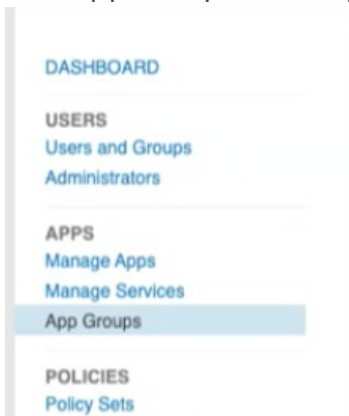
5. Click the edit pencil for App Groups to select the ones that you've set up for your Movius for BlackBerry users from the list, and click OK.



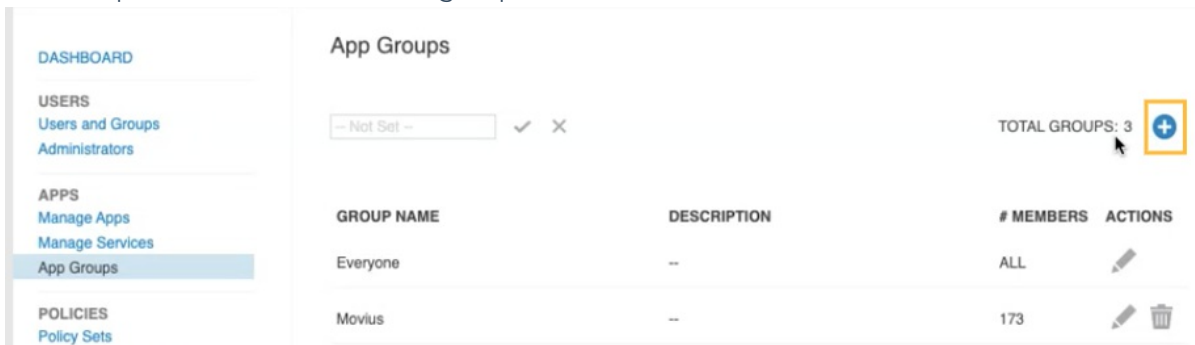
Step 3: Create App Groups for Movius for BlackBerry users

App groups define which apps users are able to see, such as the Movius for BlackBerry app. You will add members and apps to the App groups.

1. Go to App Groups under Apps



2. Click the plus icon to create a new group.

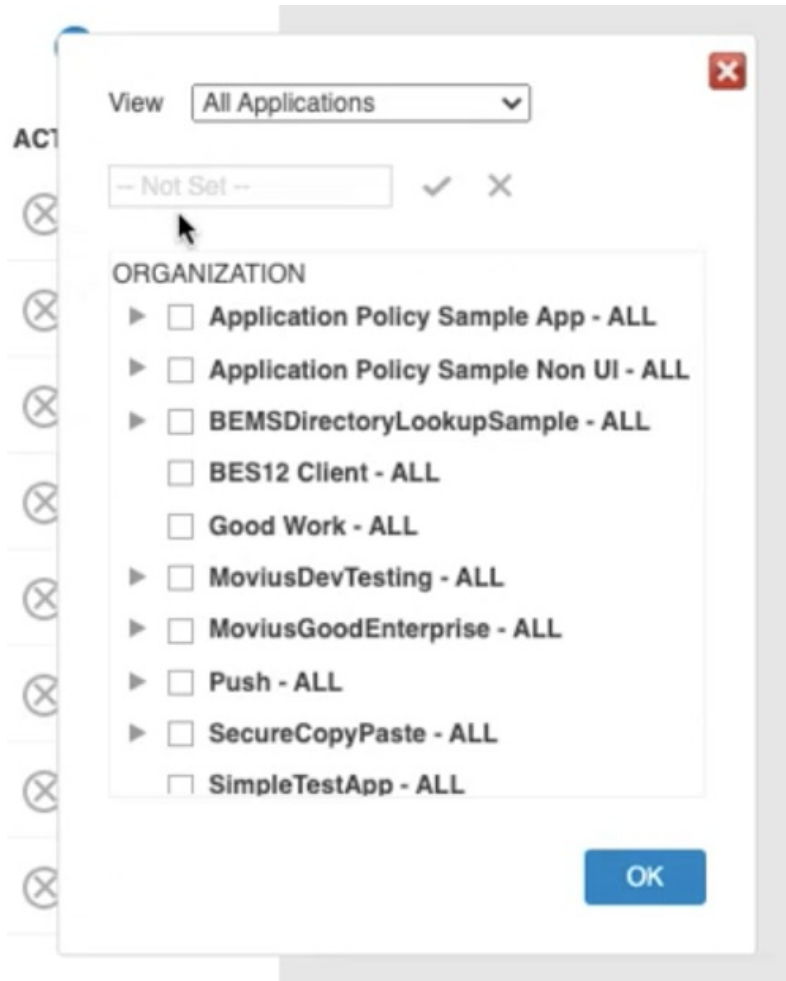


3. Click Members then Add to add people to the app group.



4. Click Apps then Add More to add Movius for BlackBerry and any other desired apps.

5. Select the apps and click OK.



6. Verify that all the apps you want the group to access are added in the Apps section.

MEMBERS | APPS

ENTITLED ENTERPRISE APPS + Add More

APP / GD VERSION	GD ENTITLEMENT ID	GD	ACTIONS
WorkGood	com.moviuscorp.workgood	✓ (Org)	⊗ 🗑
██████████	██████████	✓ (Org)	⊗ 🗑
Movius for BlackBerry	com.moviuscorp.moviusgood	✓ (Partner)	⊗ 🗑

Add Movius for BlackBerry to BlackBerry Control

Last Modified on 10/31/2021 9:39 pm EDT

If the Movius for BlackBerry app doesn't appear automatically in your organization, you may need to add it to your Control server from the public store.

Add Movius for BlackBerry to BlackBerry Control Server

1. Go to Manage Apps and click Add App.

Manage Apps

ENTERPRISE

Filter: Name / GD Entitler

70 Apps

OS: 3% iOS, 9% Android, 9% Both, 79% Other

Form Factor: 20% Universal, 80% Unknown

GD/Non-GD: 6% Non-GD, 94% GD

Source: 9% Public Store, 11% Custom, 80% CD ID Only

Add App

2. Select Public App Store.

Add App: Select App Type

- Public App Store**
Available on the Apple App Store or Google Play.
- Custom**
You have the binaries and other assets to upload.
- Web**
URL and icon that launches in the browser.
- GD Entitlement ID and Version only**
For development and other cases where the actual app binaries are not yet available or needed. Public App Store and Custom apps that use GD should be added using one of the other choices.

Cancel **Next**

3. Enter Public Store URL: <https://apps.apple.com/us/app/movius-for-blackberry/id1291542514>, and click Next.


Enter Public Store URL

Enter a URL for an app on Google Play or the Apple App Store.

<https://itunes.apple.com/us/app/movius-for-blackberry/id1291542514?mt=>

4. Click Add App.

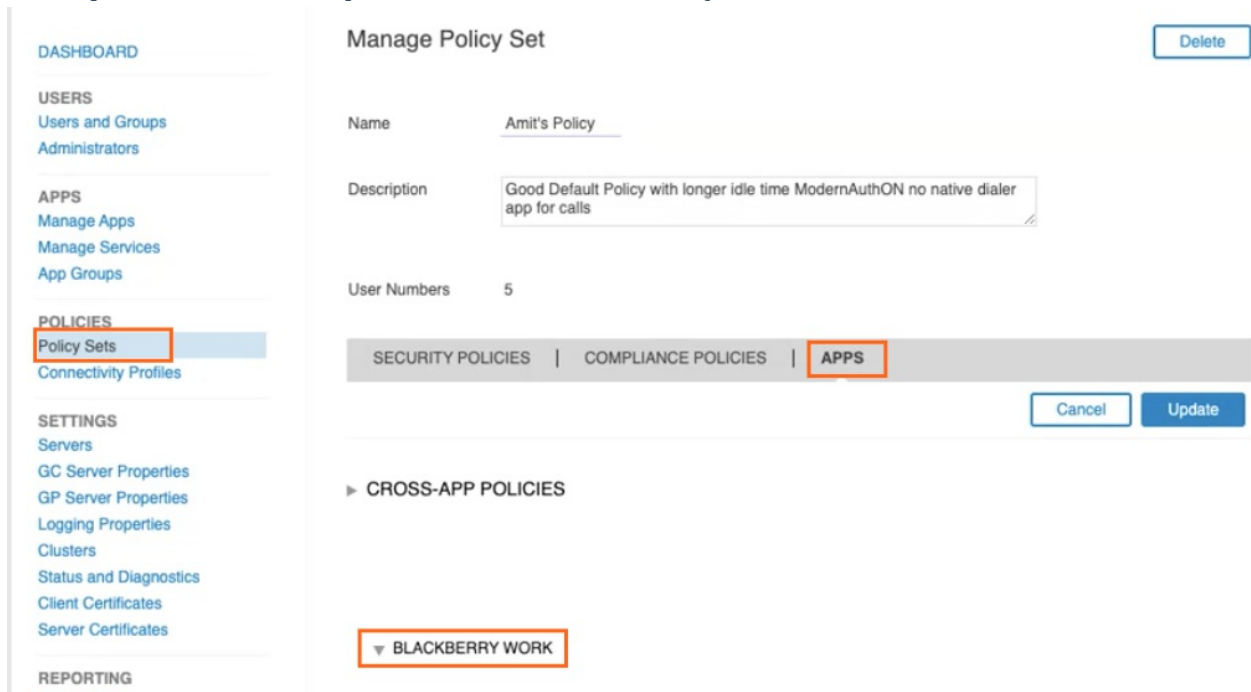
Add this App

 **Movius for BlackBerry**
v2.15.02
IOS 9.0+
IPHONE
74.5 MB

Configure policy settings for Movius for BlackBerry in Good Control

Last Modified on 10/31/2021 9:41 pm EDT

These instructions provide information on important policy settings that you should set in **Policies > Policy Sets > BlackBerry Work** section of BlackBerry Good Control.



Disable use of Native Phone

To prevent users from making calls or SMS on their native phone number and restrict use to Movius for BlackBerry, you need to uncheck the option in the Policy Set:

1. To add or edit a policy set, go to **Policy Sets** under **Policies**.
2. On the **Manage Policy Set** screen, go to **Apps > App Specific Policies > BlackBerry Work**.
3. Go to the **Interoperability** tab.

▼ BLACKBERRY WORK



4. In the **Voice** and **SMS** categories, deselect permissions to use native phone features and select options to use VOIP apps. *Note: while Movius for BlackBerry is not a VOIP-only app, but this setting allows the app to be used for calls.*



5. Click Update.

Disable Contacts sync to native

Use these settings to control use of **BlackBerry Contacts**. If you allow syncing to device

1. To add or edit a policy set, go to **Policy Sets** under **Policies**.
2. On the **Manage Policy Set** screen, go to **Apps > App Specific Policies > BlackBerry Work**.
3. Go to the **Address Book** tab.



4. In the **Address Book Sync** section.
 1. Deselect **Allow syncing BlackBerry Contacts to device**. *Note: selecting Allow syncing BlackBerry Contacts to device makes it possible for the native device to contact the BlackBerry Contacts.*
 2. Deselect **Allow device to use BlackBerry Contacts for Caller ID**.

ADDRESS BOOK SYNC

Allow syncing BlackBerry Contacts to device.

Allow access to the following contact fields:

- | | | | |
|---|--|---|---|
| <input type="checkbox"/> Title | <input type="checkbox"/> Email 1 | <input type="checkbox"/> Email 2 | <input type="checkbox"/> Email 3 |
| <input checked="" type="checkbox"/> Work number | <input type="checkbox"/> Work 2 | <input checked="" type="checkbox"/> Mobile number | <input checked="" type="checkbox"/> Home number |
| <input type="checkbox"/> Home 2 | <input type="checkbox"/> Home fax number | <input type="checkbox"/> Work fax number | <input type="checkbox"/> Other fax number |
| <input type="checkbox"/> Home address | <input type="checkbox"/> Company name | <input type="checkbox"/> Company address | <input type="checkbox"/> Notes |
| <input type="checkbox"/> Radio | | | |

Maximum length for notes field

Even if iCloud is enabled, allow syncing BlackBerry Contacts to device.

CALLER ID

Allow device to use BlackBerry Contacts for Caller ID.

Set up sync to the Exchange Server

Use these settings to allow Movius for BlackBerry to access their Exchange Contacts inside the Movius for BlackBerry app.

Movius for BlackBerry will not upload, store, or transmit the Exchange contacts. The sync will only allow the display and use of the contacts by the user within the app locally.

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2. On the **Manage Policy Set** screen, go to **Apps > App Specific Policies > BlackBerry Work**.
3. Go to the **Basic Configuration** tab.
4. Complete the fields for **Exchange ActiveSync Settings**, including **Default Domain**, **ActiveSync Server**, and **Autodiscover URL**. *Note: Completing the Autodiscover URL allows users to sync to the server without manually filling in server details.*

EXCHANGE ACTIVESYNC SETTINGS

Default Domain

Windows NT Domain to try automatically when logging in. If your server uses newer UPN (email@host.com) style login

ActiveSync Server

Specify the default Exchange Server used to attempt to connect. (Example: cas.mydomain.com)

Autodiscover URL

Provide Autodiscover URL if known. This will speed up the Autodiscover setup process. (Example: https://autodiscover.

Set up OTP/Office 365

Use these settings to set up SSO and OTP authentication.

1. To add or edit a policy set, go to **Policy Sets** under **Policies**.
2. On the **Manage Policy Set** screen, go to **Apps >App Specific Policies > BlackBerry Work**.
3. Go to the **Advanced Configuration** tab.
4. Select **Use Office 365 Settings**.
5. Select **Use Office365 Modern Authentication**.
6. Enter **Azure App ID**.
7. Enter **Office 365 Tenant ID**.

OFFICE 365 SETTINGS

Use Office 365 Settings
Use Office 365 Setup Configuration for Work mailbox account setup.

Use Office 365 Modern Authentication
Use Office 365 Modern Authentication when logging into Work mailbox account.

Azure App ID
Enter Application ID registered in your Azure Portal.

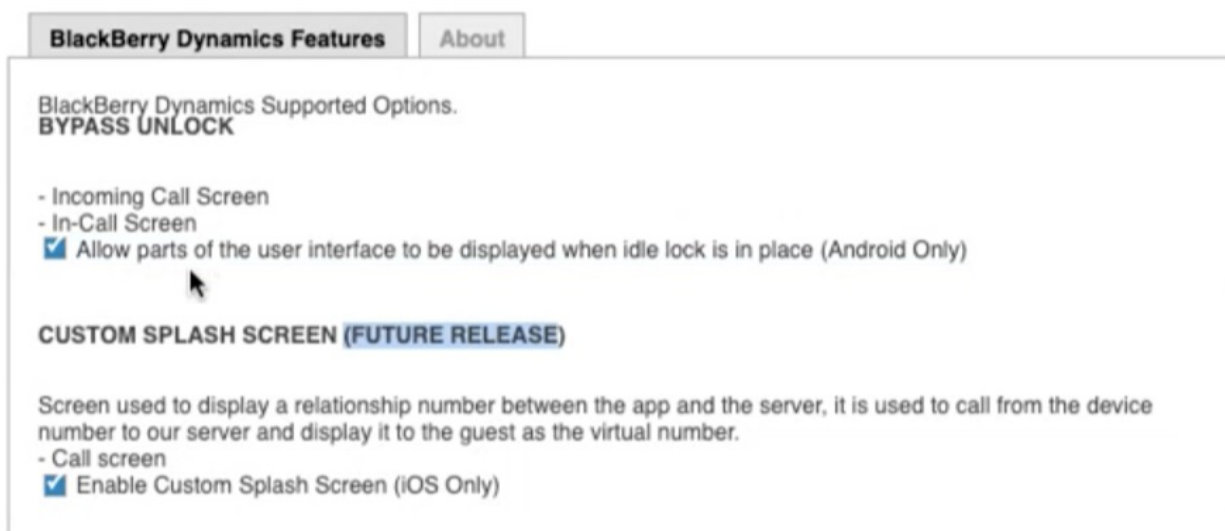
Office 365 Sign On URL
If left blank, Work setup will try login.microsoftonline.com during an initial setup.

Office 365 Tenant ID

Bypass Unlock Splash Screen

Use these settings to make sure that users can see who is calling without authentication.

1. To add or edit a policy set, go to **Policy Sets** under **Policies**.
2. On the **Manage Policy Set** screen, go to **Apps >App Specific Policies > BlackBerry Work**.
3. Select **Allow parts of the user interface to be displayed when idle lock is in place**.
4. Select **Enable Custom Splash Screen**.
5. Click **Update**.



Configure 3rd Party Universal Link

To enable communication between BlackBerry Work app and Movius for BlackBerry app, setting Universal Link configuration is essential for the new simplified onboarding flow in Movius for BlackBerry.

There are separate procedures to set this up for iOS and Android. Click the tab below to view.

iOS

1. Go to Policy Sets > Apps > BlackBerry Work > Interoperability

2. In the Launch 3rd Party App Universal Link (iOS Only) section, enter `moviuscorp.page.link` into the field and click Update.

Android

1. Go to Policy Sets > Apps > BlackBerry Work > App Specific Policies > BlackBerry Access > General

2. Check the box for Enable 3rd Party Applications and add intent in the Enter comma separated URL schemes (No spaces. Limit 4K characters) text field.

Enable Crash Reporting

Enabling crash reporting allows Movius to collect the crash reports from Firebase to diagnose issues and improve app quality

DASHBOARD

USERS

Users and Groups
Administrators

APPS

Manage Apps
Manage Services
App Groups

POLICIES

Policy Sets
Connectivity Profiles

SETTINGS

Servers
GC Server Properties
GP Server Properties
Logging Properties
Clusters
Status and Diagnostics
Client Certificates
Server Certificates

REPORTING

Export Data
Audit Trail Logs
Server Jobs
Export Connectivity Profile

TROUBLESHOOTING

Upload Server Logs
Export Server Properties

Manage Policy Set

Name Good Default Policy

Description

User Numbers 140

SECURITY POLICIES | COMPLIANCE POLICIES | **APPS**

Cancel

Update

► CROSS-APP POLICIES

BlackBerry Dynamics Supported Options.
BYPASS UNLOCK

- Incoming Call Screen
- In-Call Screen
- Allow parts of the user interface to be displayed when idle lock is in place (Android Only)

CUSTOM SPLASH SCREEN

Screen used to display a relationship number between the app and the server, it is used to call from the device number to our server and display it to the guest as the virtual number.

- Call screen
- Enable Custom Splash Screen (iOS Only)

FIREBASE CRASH REPORTING

Crash reports sent to Firebase allow Movius to fix stability issues and improve app quality. If this setting is unchecked, Movius will not receive crash reports.

- Enable Crash Reporting

Whitelist Movius hostnames and ports (if RouteALL is configured) in Good Control

Last Modified on 10/31/2021 9:41 pm EDT

Customers with RouteALL configured in BlackBerry Control should whitelist the Movius hostnames and ports in BlackBerry Control to allow the app data to access the Movius platform for TCP calls via the Dynamics servers.

Customers may also have to allow TCP ports 8021, 5061 and 143/993 to pass through their corporate firewall/proxy for the same Movius hostnames or for all Movius servers (*.moviuscorp.net).

Whitelist Movius for BlackBerry in BlackBerry Control:

1. Go to **Manage Apps** and click **Movius for BlackBerry**
2. Open the **BlackBerry Dynamics** tab
3. Click **Edit** in the **0 Server** section

The screenshot shows the 'Manage Apps > Movius for BlackBerry' configuration page. It includes a header with the app name and developer 'Movius Interactive Corporation'. Below this are tabs for 'GENERAL', 'ANDROID', 'APPLE IOS', and 'BLACKBERRY DYNAMICS'. Under the 'BLACKBERRY DYNAMICS' tab, there are three expandable sections: 'GD Entitlement ID' (set to 'com.moviuscorp.moviusgood'), 'Policy Set Override' (set to '-- Not set --'), and '0 Server'.

4. Add a **Host Name** *Note: this is provided by your Movius representative*
5. Add the following ports by clicking the +
 1. port 8021
 2. port 5061
 3. port 143

The screenshot shows the 'Edit' configuration page for 'Movius for BlackBerry'. It features a table with columns for 'HOST NAME', 'PORT', 'PRIORITY', 'PRIMARY GP CLUSTER', 'SECONDARY GP CLUSTER', and 'ACTIONS'. The table currently contains one row with an empty 'HOST NAME' field, an empty 'PORT' field, 'Primary' priority, 'First' primary GP cluster, and '-- Not set --' secondary GP cluster. A '+' icon is visible in the 'ACTIONS' column. 'Cancel' and 'Save' buttons are located at the top right of the page.

6. Click **Save**

Test via BlackBerry Access

Browse to <https://FQDN:8021> – A Linux test page indicates successful connection



Guide to MultiLine onboarding for Intune Admins

Last Modified on 10/31/2021 9:46 pm EDT

This guide is for Intune admins who are setting up MultiLine for Intune in the Endpoint Manger.

MultiLine for Intune must be deployed as an Intune Managed App before onboarding users. A user with administrator privileges in Endpoint Manager (Intune Admin) must complete the following steps:

- Step 1: Add MultiLine for Intune to Endpoint Manager
- Step 2: Create user group for MultiLine for Intune users
- Step 3: Create and add an app protection policy

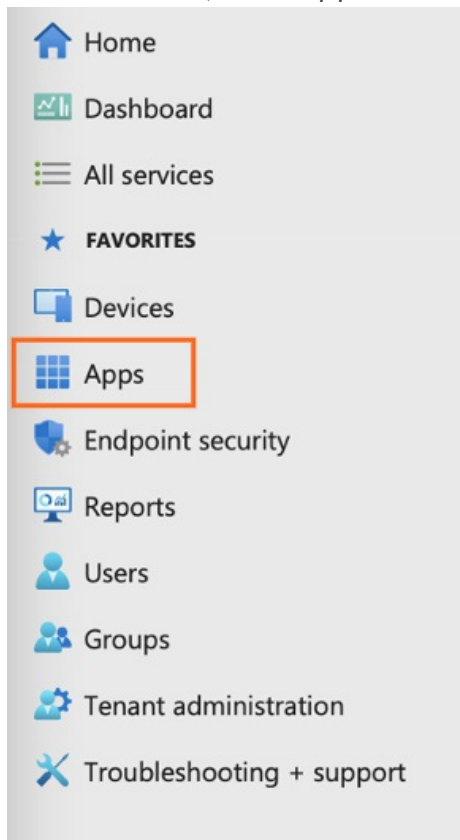
Once this process is complete the MultiLine administrator can begin onboarding users.

Step 1

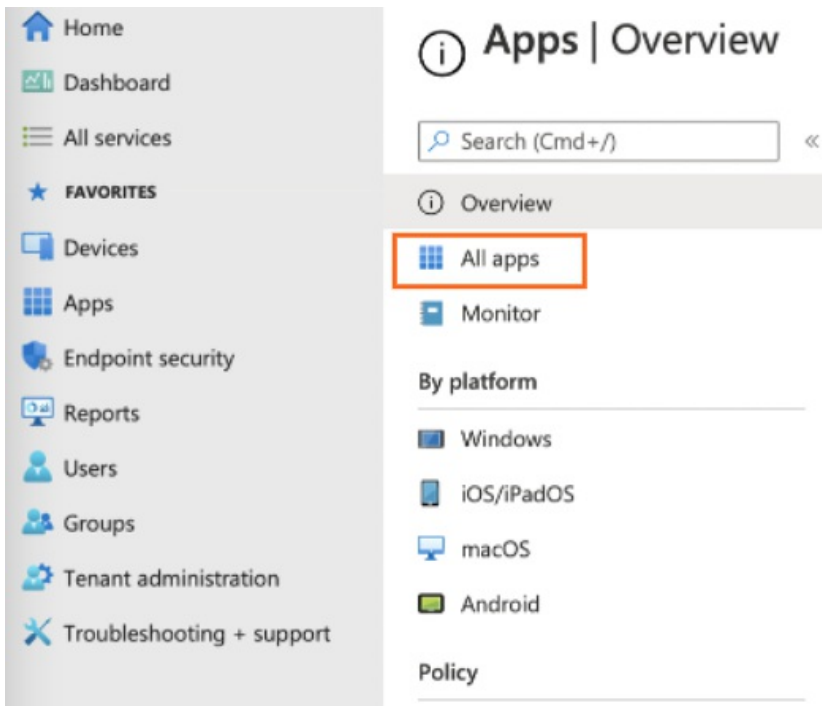
The first step to deploy MultiLine for Intune as an Intune app is to add the application to Microsoft Endpoint Manger.

Adding MultiLine for Intune (iOS) in Microsoft Endpoint Manager

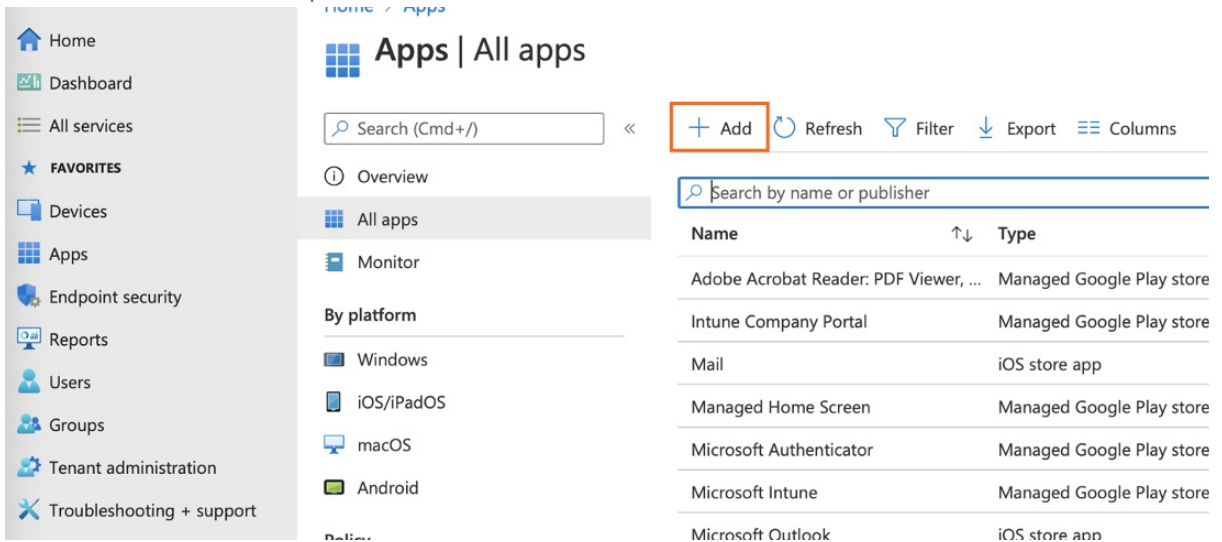
1. Log into the portal manager at <https://endpoint.microsoft.com>
2. In the left menu, select **Apps**



3. Select All apps from the sub menu



4. Select +Add from the top menu



5. Choose iOS store app for iOS or Android store app for Android from the menu then click Select

Select app type

Create app



App type

Select app type

Store app

Android store app

iOS store app

Microsoft store app

Managed Google Play app

Microsoft 365 Apps

Windows 10

macOS

Microsoft Edge, version 77 and later

Windows 10

macOS

Microsoft Defender ATP

macOS

Other

Web link

Built-In app

Line-of-business app

Select

Cancel

6. Click the Search the App Store link

Add App

iOS store app

1 App information

2 Assignments

3 Review + create

Select app * ①

Search the App Store

7. Search for the MultiLine for Intune app and click it from the results

Add App


iOS store app

1 App information

2 Assignments

Select app * ①

Search

Name	Publisher
 MultiLine for Intune	Movius Interactive Corporation

8. Click Next on the App Information screen. *The details automatically populate from the app store.*

1. For iOS, select iOS 8.0 for minimum operating system
2. For Android, select Android 4.0 (Ice Cream Sandwich) for minimum operating system

Add App

iOS store app

✓ **App information** ② Assignments ③ Review + create

Select app * ⓘ [Search the App Store](#)

Name * ⓘ

Description * ⓘ

Publisher * ⓘ

Appstore URL

Minimum operating system * ⓘ

Applicable device type * ⓘ

Category ⓘ

Show this as a featured app in the Company Portal ⓘ

Information URL ⓘ

Privacy URL ⓘ

Developer ⓘ

9. Assign the app to your groups and click **Next**

Add App

iOS store app

✓ **App information** ② **Assignments** ③ Review + create

Required ⓘ

Group mode	Group	VPN	Uninstall on device removal
No assignments			
+ Add group ⓘ + Add all users ⓘ + Add all devices ⓘ			

Available for enrolled devices ⓘ

Group mode	Group	VPN	Uninstall on device removal
No assignments			
+ Add group ⓘ + Add all users ⓘ			

Available with or without enrollment ⓘ

Group mode	Group	Uninstall on device removal
No assignments		
+ Add group ⓘ + Add all users ⓘ		

10. Verify the information in the **Summary** on the **Review + Create** page, then click **Create**

Add App

iOS store app

✓ App information ✓ Assignments **3 Review + create**

Summary

App information

Name	MultiLine for Intune
Description	MultiLine for Intune is a cloud-based service that enables individuals and global businesses to achieve regulatory compliance for their mobile business communications. The solution gives employees a distinct mobile number for their business calls, text messaging and voicemail while maintaining privacy of their personal phone number. It works over any global carrier network and can be deployed glob...
Publisher	Movius Interactive Corporation
Appstore URL	https://apps.apple.com/us/app/multiline-for-intune/id1484594063?uo=4
Minimum operating system	iOS 8.0
Applicable device type	iPad iPhone and iPod
Category	--
Show this as a featured app in the Company Portal	No
Information URL	--
Privacy URL	--
Developer	--
Owner	--
Notes	--

Previous

Create

11. When completed, your application will appear in the **Apps** view

Home > Apps

Apps | All apps

Search (Cmd+/) Add Refresh Filter Export Columns

Filters applied: Platform, App type

Intune

Name	Type
MultiLine for Intune	iOS store app

Now that we've added MultiLine for Intune to Endpoint Manager, the next step is to **Create User Group**.

Step 2

This procedure guides the Azure Admin in the steps to add a user group that will receive the Intune App Protection Policy specific to MultiLine for Intune.

Pre-requisites

- This user needs administrator permissions on Endpoint Manager to perform these instructions
- MultiLine for Intune must be **added to Microsoft Endpoint Manager**

Create User Group

1. **Create a user group** [External Link] for MultiLine for Intune users, or edit the group according to the details below:
 1. MultiLine for Intune users need to be in a **Security** user group. *This is required.*

Home > Groups >

New Group

Group type * ⓘ
Security

Group name * ⓘ
Enter the name of the group

Group description ⓘ
Enter a description for the group

Azure AD roles can be assigned to the group (Preview) ⓘ
Yes No

Membership type * ⓘ
Assigned

Create

Security groups are used to give group members access to applications, resources and assign licenses. Group members can be users, devices, service principals, and other groups.

2. Set the **Group name** and **Description** such that all Azure admins will know the purpose of this group.
3. Set **Membership type** to **Assigned**.

Home > Groups >

New Group

Group description ⓘ
Enter a description for the group

Azure AD roles can be assigned to the group (Preview) ⓘ
Yes No

Membership type * ⓘ
Assigned

Assigned

Dynamic User

Dynamic Device

No members selected

Create

4. Add members and create the group as usual.

The newly added Group will be listed under **Groups > All Groups**.

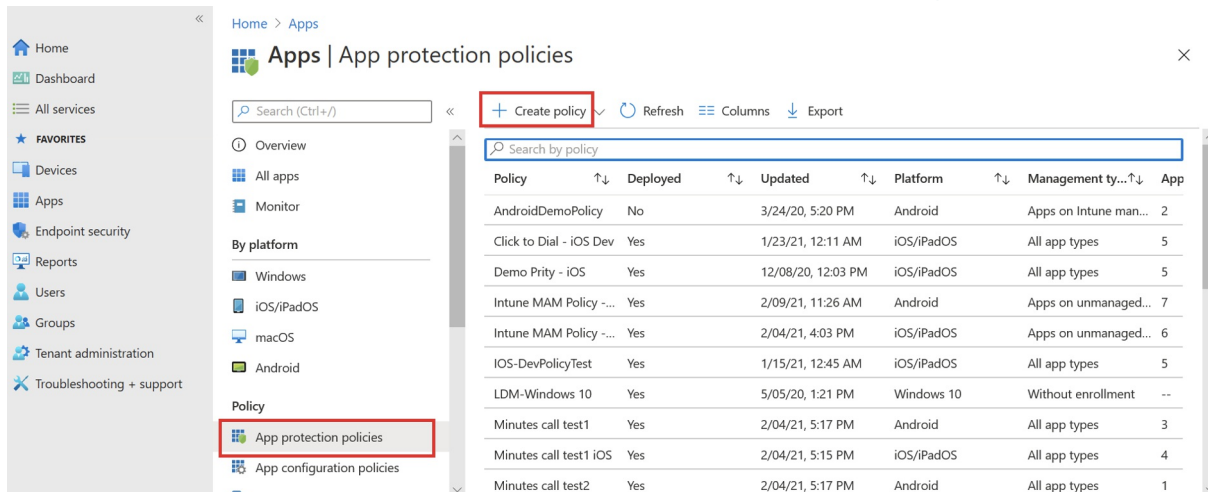
Now that we have created the user group, we can now apply the appropriate protection policies to it.

Step 3

To complete deploying the app, you must create the app protection policy, add the MultiLine for Intune app to it, configure the policies, and then assign it to the user group.

Create new policy

1. Go to Home > Apps > App Protection Policies and click +Create Policy.



2. Select iOS/iPadOS for IOS and Android for Android.

Apps | App protection policies

Search (Ctrl+ /)

Overview

All apps

Monitor

By platform

- Windows
- iOS/iPadOS
- macOS
- Android

Policy

- App protection policies
- App configuration policies

+ Create policy

Refresh

Platform	Policy Name	Deployed
iOS/iPadOS	policy	
Android		Deployed
Windows 10	Policy	No
	Click to Dial - iOS Dev	Yes
	Demo Prity - iOS	Yes
	Intune MAM Policy - ...	Yes
	Intune MAM Policy - ...	Yes
	IOS-DevPolicyTest	Yes
	LDM-Windows 10	Yes
	Minutes call test1	Yes
	Minutes call test1 iOS	Yes

3. Give the policy a name and description.

Home > Apps >

Create policy

1 Basics 2 Apps 3 Data protection 4 Access requirements 5

Name *

Multiline iOS Policy

Description

This is policy set for iOS apps |

Platform

iOS/iPadOS

Previous

Next

Add the MultiLine for Intune app to the Policy set

1. Click on + Select Custom apps to add Multiline for Intune app in the policy set.

Create policy

Choose how you want to apply this policy to apps on different devices. Then a

Target to apps on all device types ⓘ

Yes

Device types ⓘ

0 selected

Public apps

Remove

No public apps selected

+ Select public apps

Custom apps

Remove

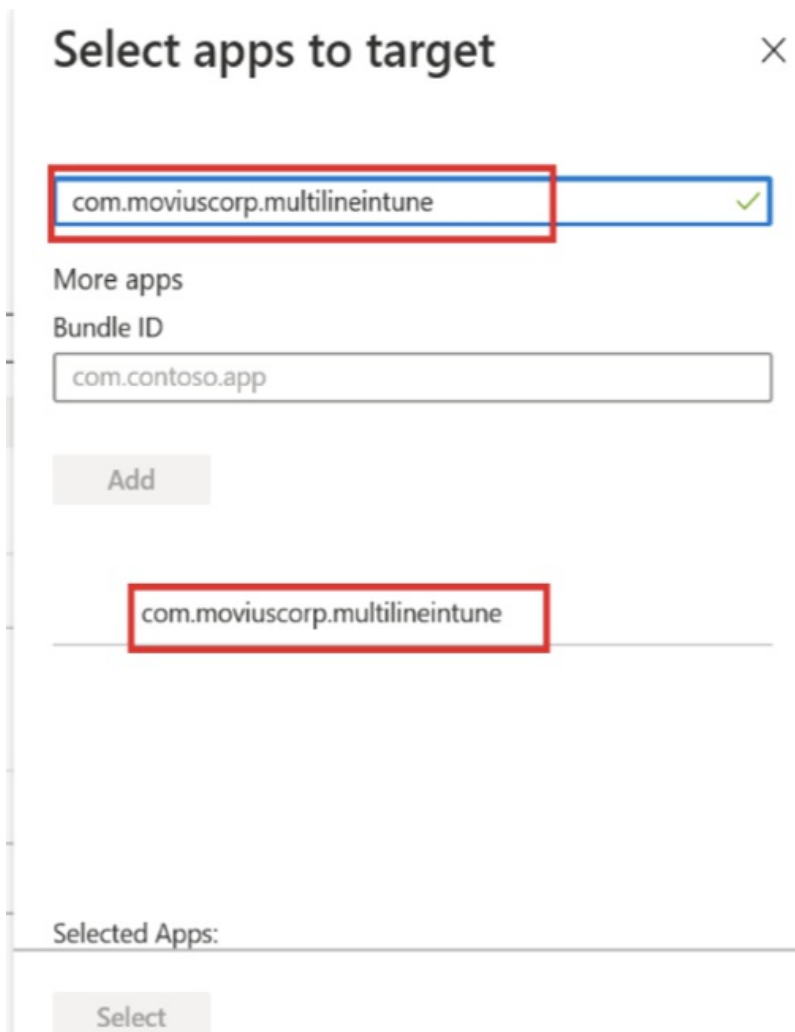
No custom apps selected

+ Select custom apps

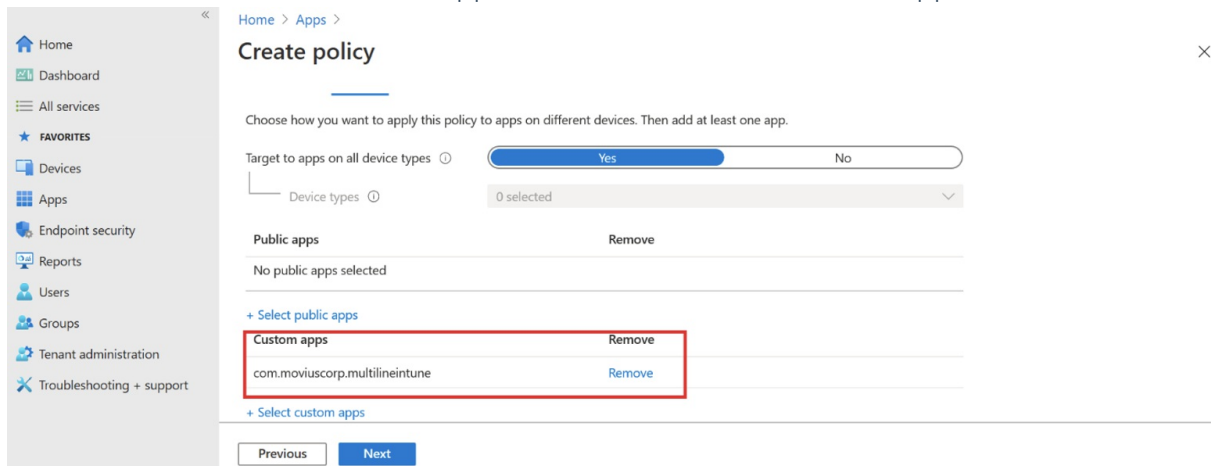
Previous

Next

2. In the Select apps to target screen enter Bundle ID:
 - For iOS search bundle: com.moviuscorp.multilineintune
 - For Android search bundle: com.moviuscorp.multilineforintune.



3. Click Select. The selected bundle/app should be listed under Custom Apps.



Configure protection policies

The next three screens are for setting application protection policies. There are specific policies you need to set for MultiLine for Intune described below. These policies must be configured separately for iOS and Android Apps.

iOS app protection policy settings (click to open)

Intune Admins: iOS app protection policies for Multi line for

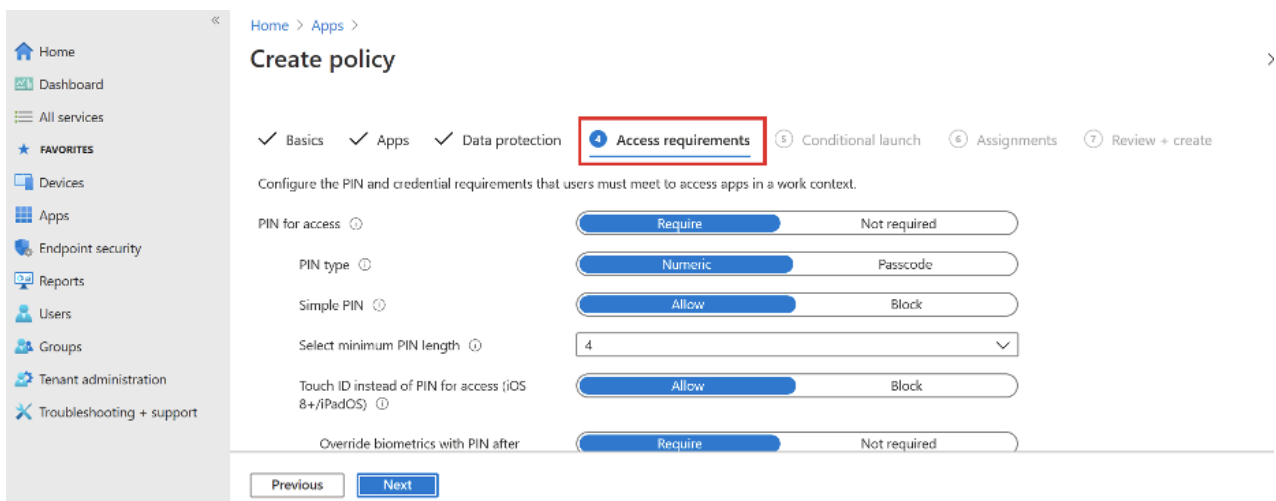
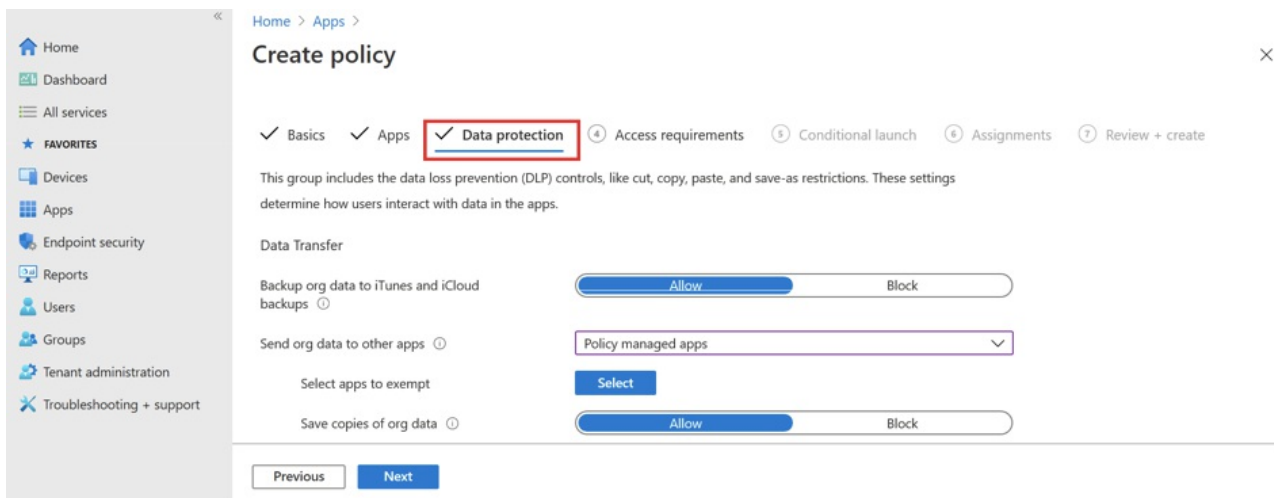
Intune Admins: iOS app protection policies for MultiLine for Intune

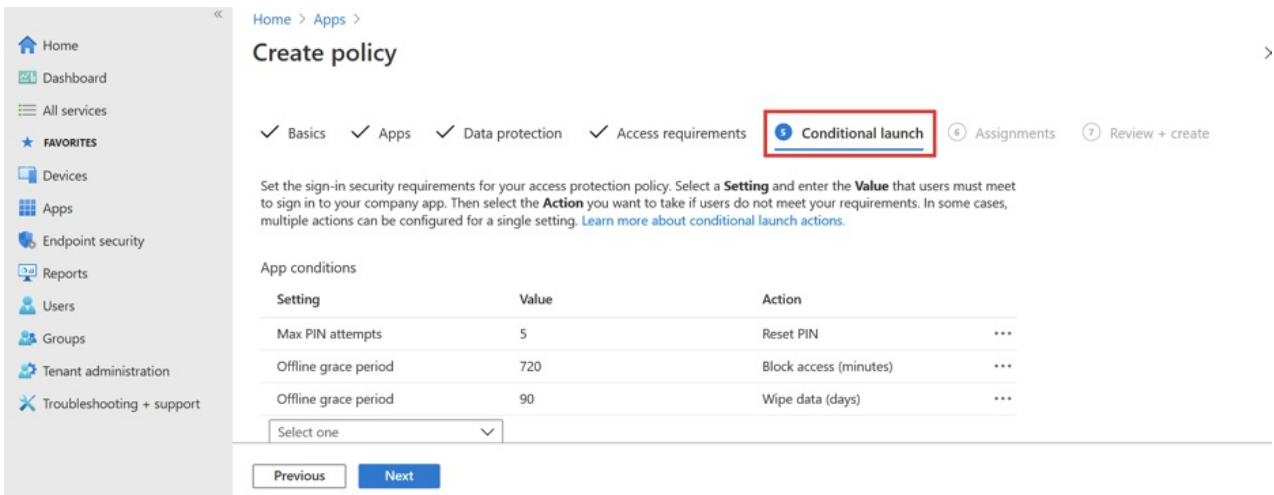
In order for MultiLine for Intune to function correctly, the Intune admin has to ...

Android app protection policy settings (click to open)

Intune Admins: Android app protection policies for MultiLine for Intune

In order for MultiLine for Intune to function correctly, the Intune admin has to ...

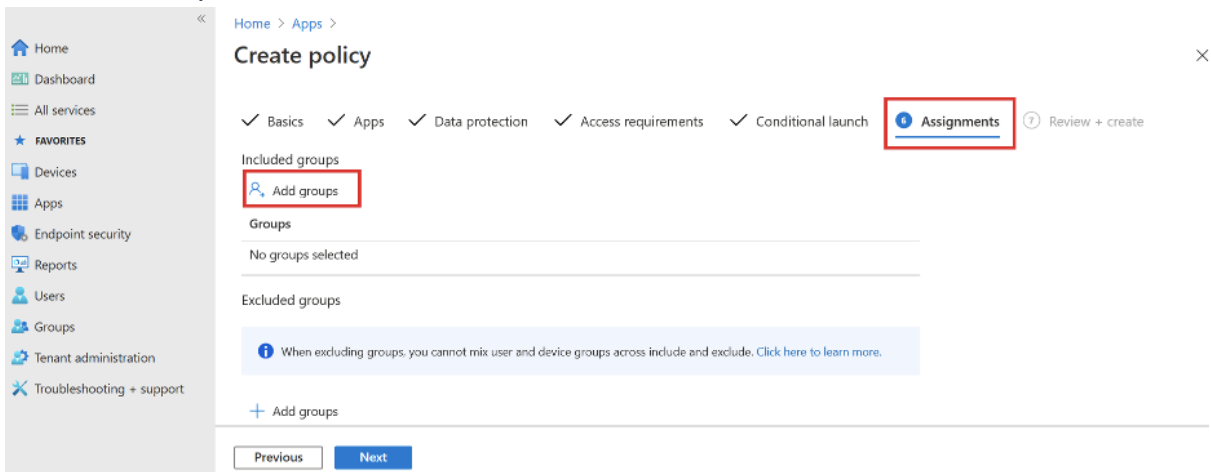




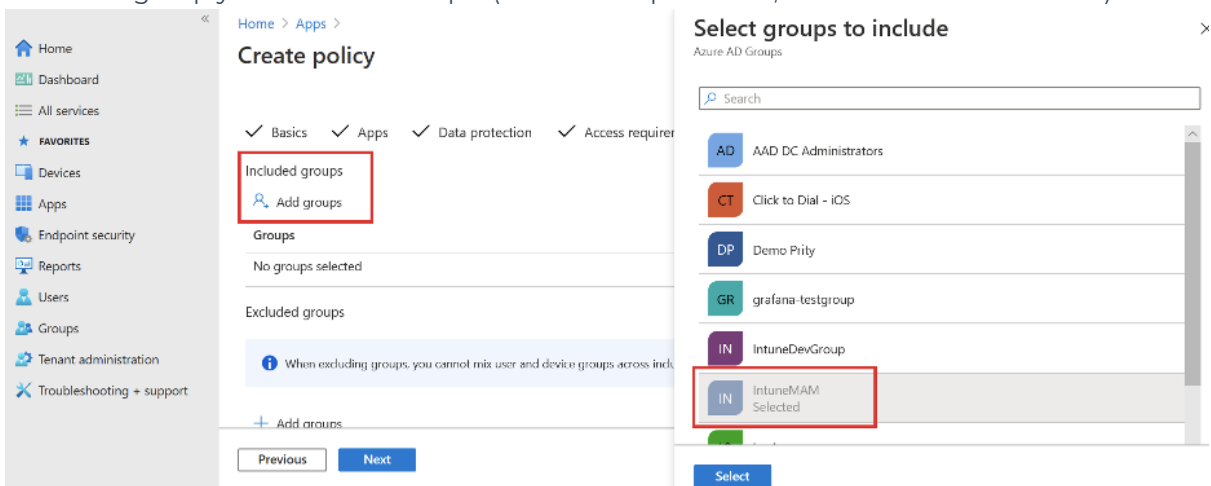
Assign to user groups

The sixth screen is for assigning the policy to the user group you made earlier.

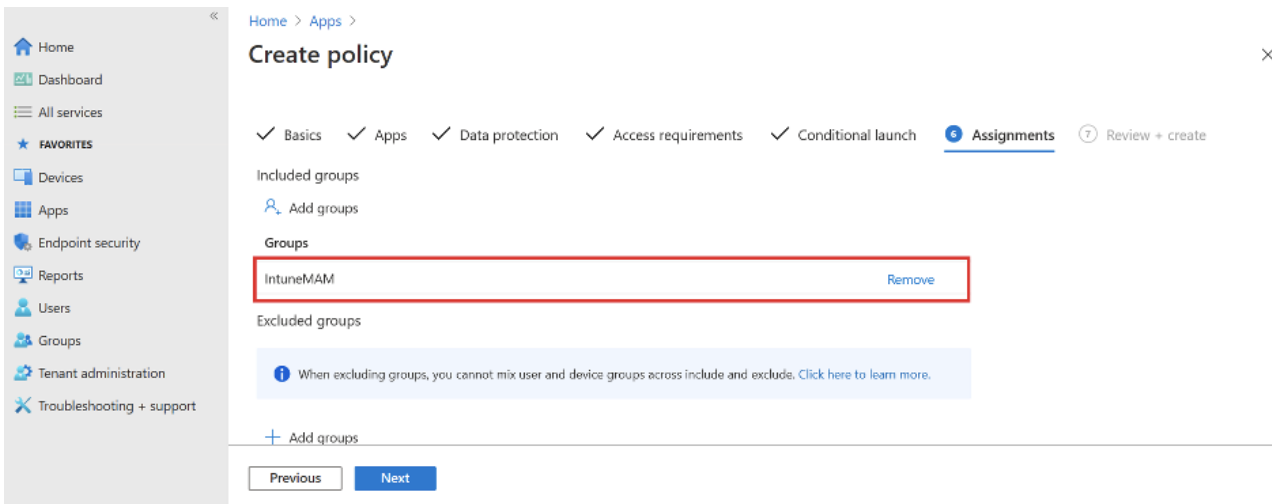
1. Click Add Groups.



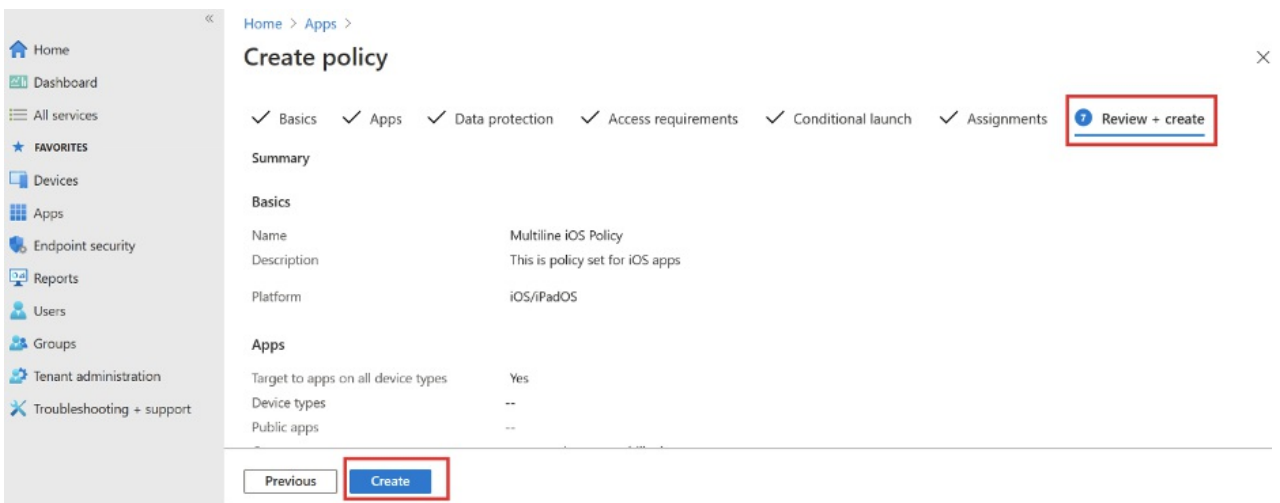
2. Select the group you created in Step 2 (in our example below, we called it "IntuneMAM")



You should see the group listed



Review what you've entered on all the tabs and click **Create**.



You're done!

To onboard MultiLine users, the MultiLine Administrator takes it from here by logging into the Admin portal.

Full E2E flow of WhatsApp Messaging Connector Enablement

Last Modified on 10/31/2021 10:18 pm EDT

There are 16 steps to adding the WhatsApp messaging connector to MultiLine.

Our WhatsApp messaging connector for MultiLine is built on Twilio and the WhatsApp for Business API.

- Facebook provides WhatsApp for Business API to Business Service Providers (BSP), such as Twilio.
- The MultiLine application uses Twilio as BSP. Using a BSP lets Movius can provide a reliable MultiLine to WhatsApp messaging experience to our customers.
- As BSP, Twilio can sell access to ISVs (Independent Service Vendors), such as Movius. As such, Movius works with Twilio on behalf of the Enterprise.

For a successful implementation and onboarding, the Enterprise, ISV, and BSP each have required activities they must complete and hand off to one another.

If you don't need to know how the sausage is made, check out the Enterprise Guide to WhatsApp Messaging Connector Enablement instead for just the steps required by Enterprise and admins.

Process Overview

Step	Description	Approx. SLA
1	Enterprise registers and verifies business with Facebook	3-4
2	Enterprise submits to Movius the brand information, Facebook Business Manager ID and other details	1
3	Movius and Twilio complete pre-validation of Enterprise	3-4
4	Movius submits to Twilio the Request Access form on behalf of Enterprise	1
5	Twilio submits WhatsApp request on behalf of Enterprise to WhatsApp for review	10-12
6	Upon approval by WhatsApp and acceptance of T&Cs by the Enterprise, Twilio sends pre-approval email to Movius	1
7	Movius sends comms to Enterprise to approve Twilio's request (on Facebook business account) to send/receive WhatsApp	1

	messages.	
8	Movius submits business profile including Message Templates, and sender profile (logo, display name) in Twilio Portal	1
9	Twilio submits business profile to WhatsApp for Facebook Approval	
10	Facebook approves the number(s) and message templates	3-5
11	Twilio sends confirmation email to Movius	
12	Movius completes display name verification	
13	Movius provisions the number in Movius System Admin Portal and enables WhatsApp messaging at parent org for customer	3
14	Movius notifies the reseller partner of WhatsApp enablement	
15	Enterprise MMP Admin verifies profile and message templates in MMP. Admin then enables WhatsApp for parent org or a sub-org as required	1
16	End-Users can begin using WhatsApp!	
Total number of days required to complete the process		33-41

Process Details

Step 1: Enterprise registers and verifies business with Facebook

Step 2: Enterprise submits to Movius the brand information, Facebook Business Manager ID and other details

The Enterprise is responsible for the following steps:

Step 3: Movius and Twilio complete pre-validation of Enterprise

Movius and Twilio are responsible for the following steps:

1. Movius submits information acquired during Step 2 to Twilio.
2. Movius requests Enterprise to fill out the WhatsApp Terms of Services Google Form.

1. Google form [external link]
2. WhatsApp Terms

NOTE: The Enterprise must acknowledge their approval for the process to proceed.

This process takes 3-4 days.

Step 4: Movius submits to Twilio the Request Access form on behalf of Enterprise

The Request Access form is submitted in the Twilio portal.

This process takes 1 day, after which you'll receive an email from us.

Step 5: Twilio submits WhatsApp request on behalf of Enterprise to WhatsApp for review

This process can take 10-12 days.

Step 6: Upon approval by WhatsApp and acceptance of T&Cs by the Enterprise, Twilio sends pre-approval email to Movius

This process takes 1 day.

Step 7: Twilio requests consent to send and receive WhatsApp messages for Enterprise

Step 8: Movius submits Message Templates and Sender profile to Twilio Portal

1. Submits the Business Profile

2. Submits the WhatsApp Message Templates

Step 9: Twilio submits business profile to WhatsApp

Twilio replies to the email thread acknowledging receipt of the business verification process and begins the review process.

Steps 8 and 9 take approximately 1 day.

Step 10: Facebook approves the numbers and Message Templates

The status is communicated in the Twilio portal.

Enabled Sender status:

WHATSAPP NUMBER	BUSINESS DISPLAY NAME	STATUS	
[REDACTED]	[REDACTED]	Approved	Configure
[REDACTED]	[REDACTED]	Approved	Configure
[REDACTED]	[REDACTED]	Approved	Configure
[REDACTED]	[REDACTED]	Waiting for Approval from WhatsApp	Edit Profile

Message Template status:

TEMPLATE NAME	MESSAGE TEXT	MESSAGE LANGUAGE	MESSAGE TEMPLATE STATUS
template_77	"[[[1]]]" I have new information regarding your mutual fund to your wife li. Please reply when it's a good time to discuss.	English	1/1 translation approved by WhatsApp
template_62	"[[[1]]]" I have a product offering update based on what we discussed. I let me know when you're available for a quick call.	English	1/1 translation rejected by WhatsApp

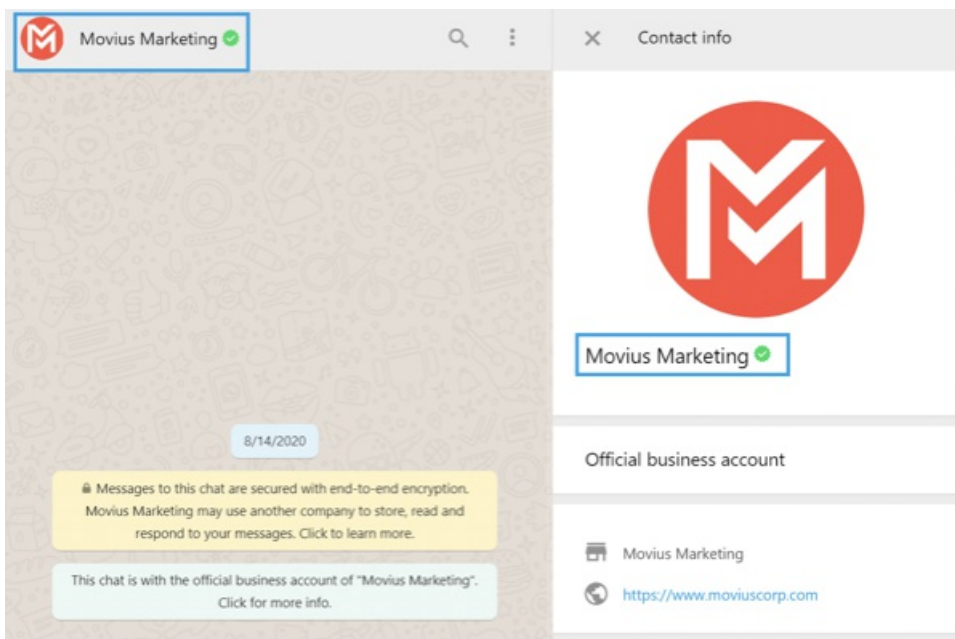
Step 11: Twilio sends confirmation email

When the sender profile and message templates are approved, Movius proceeds to the next steps.

Steps 10 and 11 take approximately 3-5 days.

Step 12: Movius completes display name verification

Before enabling the What



Step 13: Movius enables WhatsApp Messaging

1. Movius provisions the number in Movius System Admin Portal and enables WhatsApp messaging at parent org for customer
2. Movius emails the customer letting them know the numbers are ready and requesting you confirm the details are correct.

This process will take up to 3 days.

Step 14: Movius notifies the reseller partner of WhatsApp enablement

Step 15: MultiLine Admin logs into the MMP and verifies profiles and message templates

After verifying, the Admin should enable WhatsApp messaging:

Step 16: End-Users can begin using WhatsApp!

End Users will get pop-ups in the MultiLine app letting them know WhatsApp messaging is

available for use.

Users can navigate to their contacts to find the Whatsapp messaging icon and get started!

Register a Facebook for Business Account and complete business verification

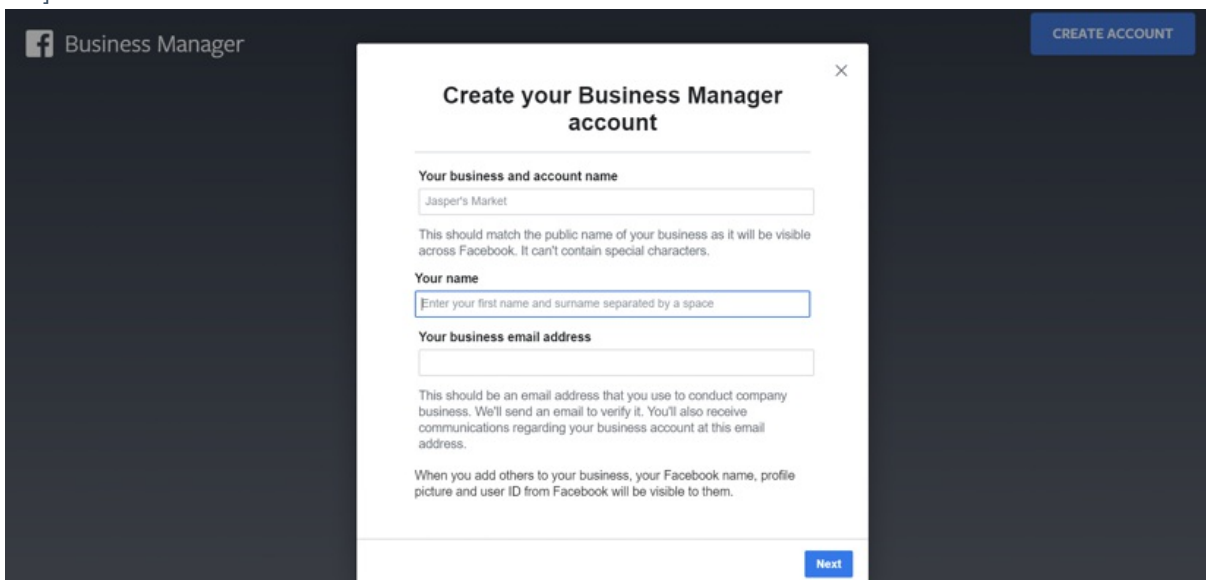
Last Modified on 10/31/2021 10:09 pm EDT

Registering a [Facebook for Business account](#) [external link] is required to enable WhatsApp Messaging Connector for MultiLine.

Confirm that you have a Business Page on Facebook and work with the Facebook Business Manager (the person who runs the Facebook page for your business) to complete the following steps.

1. Register a Facebook for Business Account

1. The Facebook business Manager registers the account for Business/Brand at https://www.facebook.com/pages/creation/?ref_type=facebook_business_website [external link].

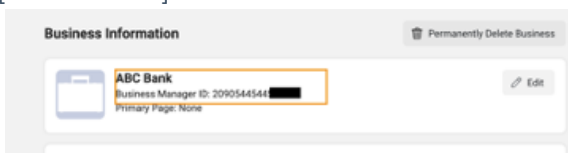


The screenshot shows the 'Create your Business Manager account' form within the Business Manager interface. The form includes the following fields and instructions:

- Your business and account name:** A text input field containing 'Jasper's Market'. Below it, a note states: 'This should match the public name of your business as it will be visible across Facebook. It can't contain special characters.'
- Your name:** A text input field with the placeholder 'Enter your first name and surname separated by a space'.
- Your business email address:** An empty text input field. Below it, a note states: 'This should be an email address that you use to conduct company business. We'll send an email to verify it. You'll also receive communications regarding your business account at this email address.'
- A final note at the bottom: 'When you add others to your business, your Facebook name, profile picture and user ID from Facebook will be visible to them.'

The form has a 'Next' button at the bottom right and a 'CREATE ACCOUNT' button in the top right corner of the Business Manager window.

2. Have the Facebook Business Manager provide the Facebook Business ID in [Business Manager](#) [external link].



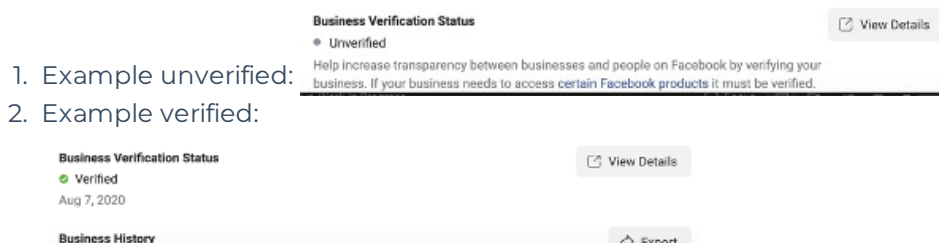
The screenshot shows the 'Business Information' section of the Business Manager settings. It displays the following information:

- Business Name:** ABC Bank
- Business Manager ID:** 2090544544
- Primary Page:** None

There is an 'Edit' button next to the Business Manager ID and a 'Permanently Delete Business' button at the top right of the section.

3. Not all business accounts are verified. Have the Facebook Business Manager confirm the status in [Business Settings](#) [external link].

Note: the blue checkmark does not mean that the account is verified. Only the below indicates verification status.



The image shows two examples of the 'Business Verification Status' section in Business Settings:

- Example unverified:** Shows 'Unverified' status with a grey checkmark icon. Below it, a note reads: 'Help increase transparency between businesses and people on Facebook by verifying your business. If your business needs to access certain Facebook products it must be verified.' A 'View Details' button is visible.
- Example verified:** Shows 'Verified' status with a green checkmark icon and the date 'Aug 7, 2020'. A 'View Details' button is visible.

Below the verified example, the 'Business History' section is partially visible with an 'Export' button.

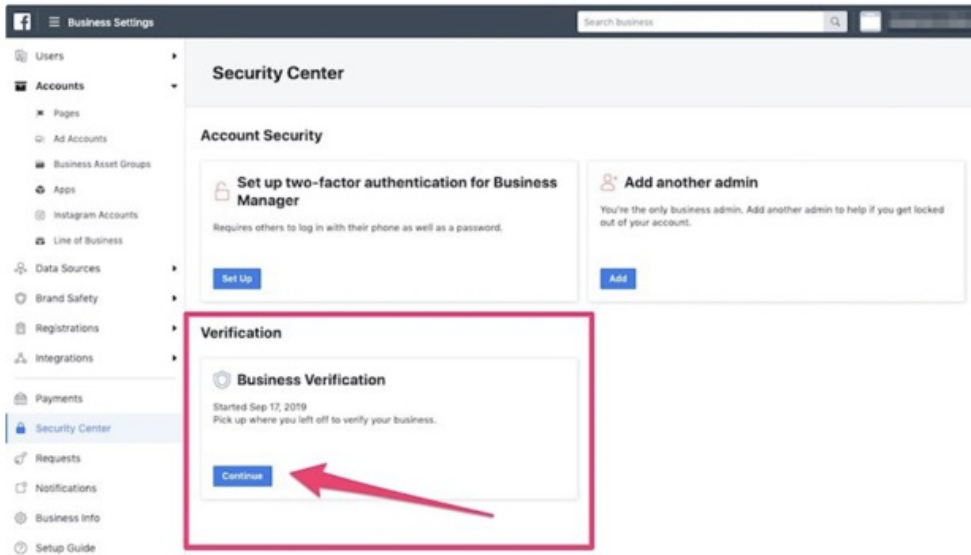
4. If your account is unverified, the Facebook Business Manager will need to complete the

process of **verifying the business** [external link] with Facebook.

5. This process allows Facebook to verify the business and usually takes 2-3 business days

2. Complete Business Verification

1. Facebook Business Manager logs into their Facebook business account.
2. Goes to Security Center.
3. Clicks the Continue button under Business Verification.



Submit brand information required to register Enterprise with Twilio

Last Modified on 10/31/2021 10:10 pm EDT

We need the following information from the Enterprise to complete registration activities with Twilio.

1. Order the WhatsApp enabled numbers from Movius. Provide quantity, display names (see sub-step 3 below), and desired country codes.
 2. Provide Movius the Facebook Business ID.
 3. Enterprise must provide Movius brand information for Sender Profile as follows:
 1. Company Name
 1. Display names for each line of business (example: "Movius US"). [Display names \[external link\]](#) are subject to approval.
 2. Legal address
 3. Company representative email ID
 4. Company Web Site
 5. Company HQ country
 6. Company Vertical/Area of Business (Optional)
 7. Facebook Business Manager ID
 8. Use case for WhatsApp:
 1. Notification
 2. Customer Support
 3. 2FA or User Verification
 9. Approximate expected message volume
 10. Regions where Enterprise will send messages
 11. Business number(s)- Country details
 12. Quantity for each country
 13. List of Template Messages (See Getting custom [Message Templates](#))
 14. A public accessible link to a 640 x 640 px .jpg or .png file to serve as profile image.
-

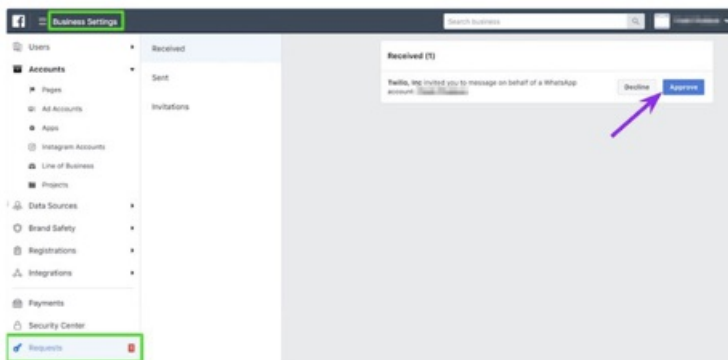
Grant Twilio required permissions in Business Manager

Last Modified on 10/31/2021 10:10 pm EDT

After submitting the registration to Twilio on behalf of the enterprise, a pending request will appear in Facebook Business Manager [Business Settings](#) [external link].

The Facebook Business Manager must approve the request which provides consent for Twilio to send and receive WhatsApp messages for the Enterprise.

1. Go to **Business Settings**.
2. Click **Requests**.
3. Click **Approve**.



The Enterprise must acknowledge their approval for the process to proceed.

Requesting custom WhatsApp Messaging Connector Templates

Last Modified on 10/31/2021 10:11 pm EDT

About message templates and the 24 hour session

In order to protect the WhatsApp user experience, Facebook has guidelines that prevent businesses from using the platform to advertise to, spam, or harass users. One of the ways they enforce this is to restrict freeform messaging between the business and WhatsApp user to 24 hour sessions.

If the business account wants to begin a session, it's required to use pre-approved message templates to contact the customer. This way Facebook can vet ahead of time that businesses initiate conversations with customers according to their guidelines. WhatsApp provides three default templates, and Movius will provide an additional set of default templates, but refer to the following instructions if you want additional templates.

Message template approval process

1. All message templates are submitted to each account individually.
2. WhatsApp supports up to 250 templates per account.
3. It takes up to 2 days for WhatsApp to review new template message requests.

Guidelines

You can find the guidelines that must be followed to get message templates approved in the [Twilio Docs](#). However, be aware that there are limits to our use of variable parameters, discussed below.

Every message template will have to match a certain category. Most of our users only use the below categories:

Category	Description
Account Update	Let customers know about updates to their accounts
Alert Update	Send important updates or news to customers
Appointment Update	Send confirmations, reminders, or other updates to customers about their appointments.
Auto-Reply	Primarily used to categorize opt in messages

Issue Resolution	Respond to questions, concerns, or feedback from customers about your business.
------------------	---

NOTE: Opt in messages are subject to the same approval process as other message templates, even though they don't appear in the message templates in the WhatsApp interface.

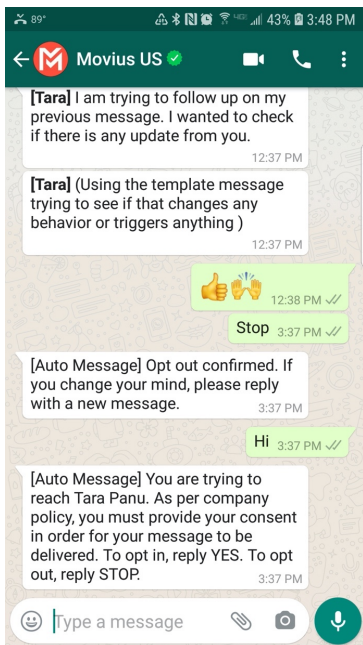
Variable Parameters

Template messages use placeholder values that can be replaced with dynamic content inside double curly braces ({{...}}) when the message is sent:

NOTE: We can only support variable parameters that can be hardcoded ahead of time. For example, we can use a variable parameter representing the name of the MultiLine user. But we can't support conditional variable parameters such as the contact's name or the date and time of an appointment.

Best Practices

The most subjective part of the review process is whether or not a message contains promotional or marketing content. *{{{T}}}* is a variable that would be replaced in the messages as the name of the MultiLine user (Example: "Tara").



Approved Examples	Rejected Examples
-------------------	-------------------

<p>"*{{1}}*, we have a new update regarding your account. Please respond to this message to receive it. Have a nice day!"</p>	<p>*{{1}}* Your {{2}} appointment is coming up on {{3}}</p> <p><i>Why: can't support variables that we can't hardcode ahead of time.</i></p>
<p>*{{1}}* I've emailed you the documents to complete. Please fill them out and send back to us as soon as you can. Let me know if you see it or need me to resend it over.</p>	<p>*{{1}}* Reminder: {{2}}</p> <p><i>Why: Variables must have an obvious purpose, will be flagged promotional</i></p>
<p>*{{1}}* Hi! Just wanted to remind you of our meeting tomorrow. Please reply back if you need to reschedule.</p>	<p>*{{1}}* your appointment is coming up tomorrow</p> <p><i>Why: Grammar or spelling mistakes will get rejected</i></p>
<p>*{{1}}* Would you be willing to share your feedback on your experience with us? We'd greatly appreciate it! Please reply back with 'yes' and I'll send you the link.</p>	<p>*{{1}}* I've emailed you the latest market report. Have a look and give me a call if you want to discuss.</p> <p><i>Why: Not a transaction, will be flagged as promotional</i></p>

Formatting

Review the [Twilio Docs](#) on formatting for information on how you can format template messages. Example: **bold text** creates **bold text**.

Types of Rejection

Rejection type	Description
PROMOTIONAL	WhatsApp has deemed this to contain promotional or marketing content.
TAG_CONTENT_MISMATCH	The language and/or template category don't match the template content.
INVALID_FORMAT	Placeholders or other elements formatted incorrectly.

Revising rejected examples

Sometimes less is more. Because of the restrictions on message template content, think of how you can communicate your message in a way that's transactional, but covers your range of

scenarios.

Rejected message 1: *{{1}}* Just wanted to follow up on my previous message.

Rejected message 2: *{{1}}* Trying to touch base with you over text as I couldn't connect with you either by phone or email.

Revised and accepted: *{{1}}* I am trying to follow up on my previous message. I wanted to check if there is any update from you.

Rejected message 1: *{{1}}* With such recent volatility in the markets, please let me know if you have any questions I can help with.

Rejected message 2: *{{1}}* I wanted to see if we can catch up soon. From what we have talked about, there are some new products that I think you'll find interesting. Let me know when you're available for a quick call.

Revised and accepted: *{{1}}*, I have a new information regarding your account. Please respond to this message to schedule a call. Thank you!"

Rejected message: *{{1}}* As we roll into a new year, I wanted to see if we could sit down for an annual portfolio review?

Revised and accepted: *{{1}}*, I have an update regarding your annual portfolio review. Please respond to this message to receive it. Hope you're well!!"

Opt In Template Messages

Because Opt In messages are a first contact with a customer, we must submit them for the same approval process as other message templates. However, Opt In messages won't appear in your list of template messages to send customers.

By default, we can use the same Opt In message text that your organization uses for SMS.

WhatsApp Opt-In requirements and tips

1. Requirements
 1. Businesses must clearly state that a person is opting in to receive messages from the business over WhatsApp
 2. Businesses must clearly state the business' name that a person is opting in to receive messages from
2. Tips
 1. Explicitly call out the types of messages a person is opting into
 2. Provide instructions for how customers can opt out and honor these requests
 3. Monitor your quality rating, especially when rolling out new opt-in methods

Message Type	Suggested text
Requesting the Opt In	*[Auto Message]* {{1}} from ABC Corp is trying to contact you. Please reply YES to opt in to receiving WhatsApp messages, or STOP to opt-out.

Let the customer know they accepted the Opt In	*[Auto Message]* Thanks for accepting messages from {{[1]}}, opt in confirmed. If you wish to opt out at any time, reply STOP.
Let the customer know they rejected the Opt In	*[Auto Message]* You've rejected to receive messages from ABC Corp. {[1]} will no longer be able to message you unless you reply YES to opt in.

Troubleshooting

If submitted message templates get rejected, but we feel it is in error, it is possible to appeal the decision by submitting a ticket to Twilio. We can also try resubmitting the rejected template with a few minor tweaks.

MultiLine for Salesforce Installation Guide for Salesforce Admins

Last Modified on 10/31/2021 10:02 pm EDT

This guide is intended for the administrator of the Salesforce installation. Some integration steps will require actions by a MultiLine administrator.

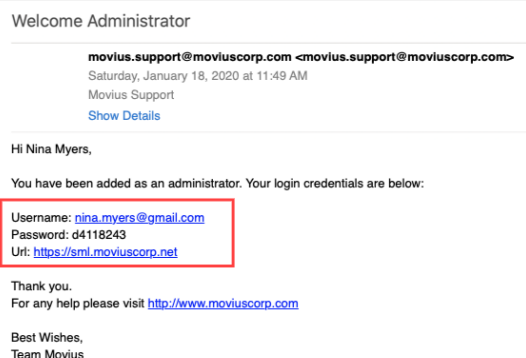
MultiLine Administrator Action Needed

Before proceeding, the MultiLine Administrator needs to complete the steps in [Create an API User for the Salesforce Admin](#)

Once you've received the Welcome Administrator email, you're ready to get started.

Step 1 - Set up public site

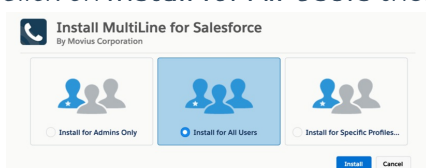
1. Refer to your Welcome email for integration credentials.



2. Deploy [My Domain](#) in your organization. For more information about My Domain, see [Salesforce Help](#).
3. Create new public site called MultiLine.
 1. Site Label and Site Name are case-sensitive and must match with MultiLine (Note: L in MultiLine is capitalized). For more information, see [Salesforce Help](#).

Step 2 - Install Salesforce connector

1. Select [MultiLine for Salesforce](#) from [AppExchange](#)
2. Click [Get Now](#) and log in with your Salesforce credentials
3. Click [Install in Production](#)
4. Enter all required fields and accept [Terms and Conditions](#)
5. Click [Confirm and Install](#)
6. Click on [Install for All Users](#) then [Install](#)



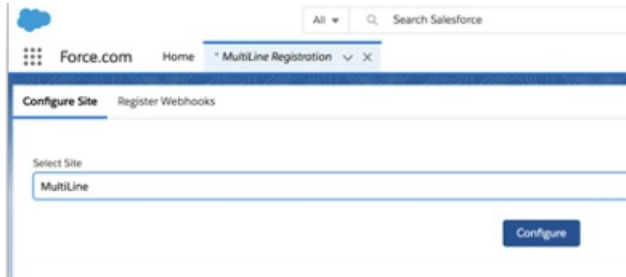
7. After the installation the MultiLine for Salesforce application will be listed as MultiLine within

Installed Packages

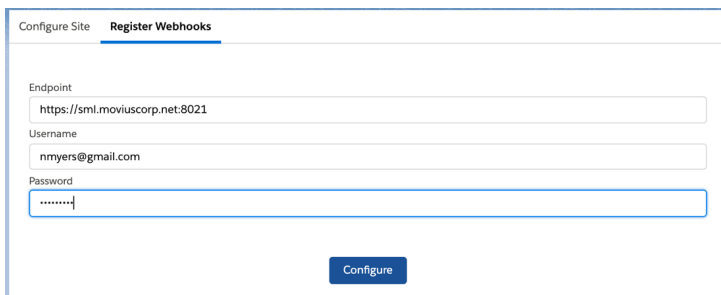
Note: Users won't have access to MultiLine for Salesforce until you add them to the Call Center at a later step

Step 3 - Register MultiLine

1. Open App Launcher and open MultiLine Registration.
2. Select MultiLine site under Configure Site and click Configure



3. Click **Register Webhooks** tab and enter the information in the fields below:
 - Endpoint: `https://[MultiLine admin portal URL]:8021` (**Note:** add port 8021 to MultiLine admin portal URL)
 - Enter Username/ Password credentials that you received via email from the MultiLine Administrator. (See Step 1)
 - Click **Configure** and select **Enable Softphone** to complete.



Endpoint

Username

Password

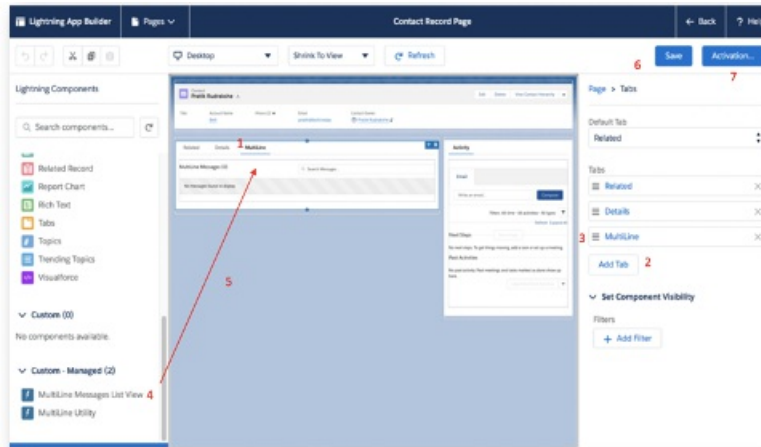


Service Name	Status
Register Webhook URL	Registration Completed
Register Message Event	Registration Completed
Register Call Start Event	Registration Completed
Register Call End Event	Registration Completed
Register Voicemail Event	Registration Completed
Enable Softphone	<input checked="" type="checkbox"/>

Step 4 - Configure MultiLine Messages List

MultiLine Messages View can be added to Contacts, Leads, and Person Account Records Page.

1. Select a Contact, click Setup and Edit Page.



2. Click in the tab area
3. Click **Add Tab**
4. Name the tab as **MultiLine**
5. Locate **MultiLine Messages List View** under **Lightning Components** on the left section
6. Drag it under the **MultiLine** tab
7. Click **Save**
8. Click **Activate**
9. Click **App Default**. Then **Assign as App Default**
10. Select desired Lightning apps and click **Next** and **Save**.

Select Apps

Select the Lightning apps to display "Contact Record Page" as the app default page.

APP NAME	DESCRIPTION
<input type="checkbox"/> LightningBolt	Discover and manage business solutions designed for your industry.
<input type="checkbox"/> LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience
<input type="checkbox"/> Retail	Manage your retail inventory, promotions, planograms and other ins...
<input checked="" type="checkbox"/> Sales	Manage your sales process with accounts, leads, opportunities, and ...
<input checked="" type="checkbox"/> Sales Console	(Lightning Experience) Lets sales reps work with multiple records on...
<input type="checkbox"/> Service Console	(Lightning Experience) Lets support agents work with multiple recor...

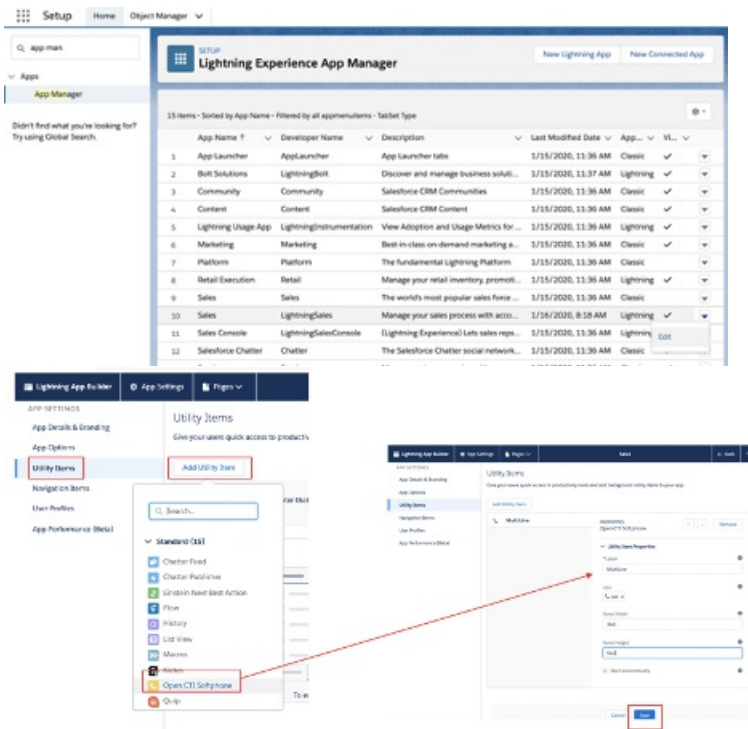
Repeat the steps above for the other Lead and Person Account pages as well.

Step 5 - Enable Open CTI for Salesforce connector

Before you can enable the integration, you'll need to select the Lightning app you want to enable with MultiLine. Here's how:

1. Navigate to the **App Manager**
2. Select each Lightning app you want to enable with MultiLine
3. Select **Edit**
4. Select the **Utility Items** >> **Add Utility Item** >> **Open CTI Softphone**
5. Rename the Open CTI Softphone as **MultiLine**
6. Set Panel Width to '340' and Panel Height '540'

7. Make sure **Start Automatically** checkbox is selected
8. Click **Save**



Step 6 - Enable Out of Office

1. Open Developer Console under Setup
2. Click **Debug** and **Open Execute Anonymous Window**
3. Copy and paste the following code in the window as shown below then click **Execute** to complete

```
String cronExp = '0 30 * ? * *';
MultiLine.MultilineUpdateOOOStatusScheduler newSch = new MultiLine.MultilineUpdateOOOStatusScheduler();
System.schedule('MultiLine OOO Status Scheduler', cronExp, newSch);
```

MultiLine Administrator Action Needed

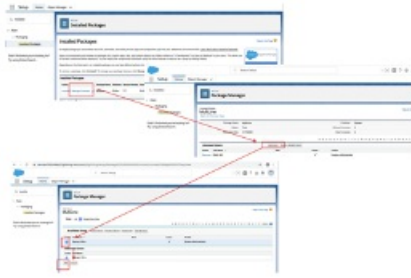
Before proceeding, the Salesforce Administrator needs to complete the steps in **Configure MultiLine Portal**.

Once the MultiLine administrator actions are complete, proceed.

Step 7 - Manage Licenses

1. Go to **Installed Packages** under Setup
2. Select **MultiLine** then click **Manage Licenses**.

3. Click **Add User** and select your users and click **Add** to complete



Step 8 - Apply "MultiLine" Permissions set to users

1. Open **Permission Sets** under **Setup**
2. Click **MML Permissions**
3. Click **Manage Assignments**
4. Click **Add Assignments**



Step 9 - Add users to Call Center

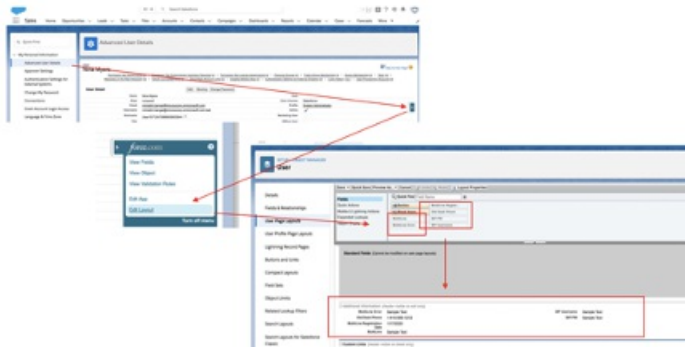
1. Go to **Call Centers** under **Setup** and click **Continue**
2. Select **OpenCTI** and click **Manage Call Center Users**
3. Click **Add More Users**
4. Select **Users** and click **Add to Call Center**

Step 10 - Manage Users

Set Additional Fields to User Layout

1. Go to user profile, click on **Settings**
2. Select **Advanced User Details**. Expand the menu on the right and click **Edit Layout**.
3. Under **User Page Layout**, drag each of the shown fields and drop into **Additional Information** section as shown. (Fields to be selected: MultiLine, MultiLine Error, MultiLine Registration Date, Old Desk Phone, SIP PIN, SIP Username)
4. Click **Save**.

Note: It is recommended that the MultiLine for Salesforce users do not have edit abilities on Additional Information section.



Re-registering users

If the user sees any error (ex: “WebRTC details not found”) in the MultiLine for Salesforce utility, re-register user using following steps

1. Under **Setup**, go to **Users**.
2. Click user for User details.
3. Click **Edit**.
4. Go to **Additional Information** section.
5. Clear **MultiLine** error field, **MultiLine** field and **MultiLine Registration Date**.
6. **Save** the settings.
7. Ask user to logout and login again.

Additional Information	
MultiLine Error	SP Username 3B-vngCkxW1g41TK
Old Desk Phone +16781-387-5238	SP PW 7x1Sv+nd4R9VUjV
MultiLine Registration Date	
MultiLine	

De-provisioning users

If the user needs to be deprovisioned from using MultiLine for Salesforce,

1. Clear **MultiLine** and **MultiLine Registration Date** as shown in the above steps.
2. Change the user Profile to the one that does not have MML Permissions or Remove the MML Permissions from user's Assignment

Congratulations!

This completes the configuration of **MultiLine for Salesforce**. Next time when Salesforce users login into Salesforce, they'll see the **MultiLine** utility in the bottom left bar. After accepting the terms and conditions, they'll be able to use MultiLine.

Upgrade and Register MultiLine for Salesforce

Last Modified on 10/31/2021 9:48 pm EDT

This provides instructions to MultiLine for Salesforce administrators who need to upgrade MultiLine for Salesforce.

Step 1: Upgrade MultiLine for Salesforce

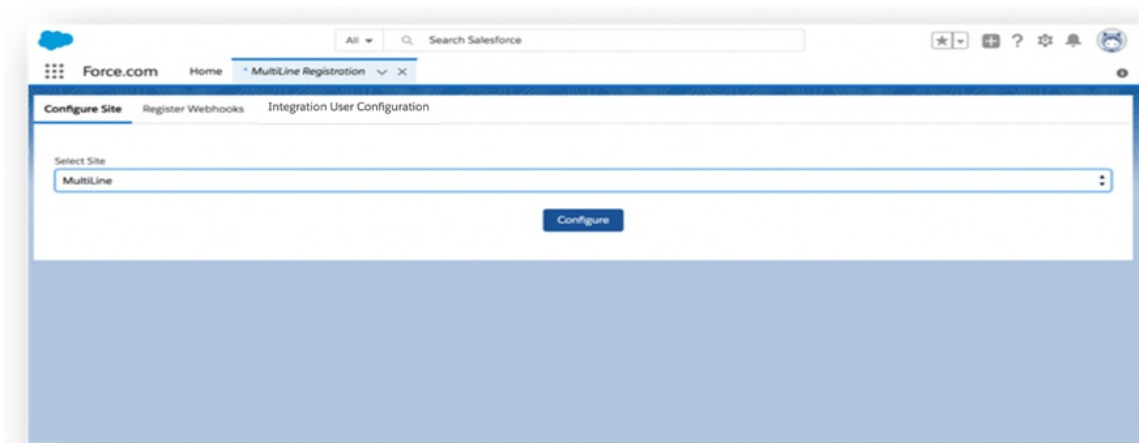
1. Select **MultiLine for Salesforce** from AppExchange
2. Click **Get Now** and log in with your Salesforce credentials
3. Click **Install in Production**.
4. Enter all required fields, accept **Terms and Conditions** and click **Confirm and Install**
5. Click on **Install for All Users** then click **Upgrade**

App Name	Publisher	Version Name	Version Number
MultiLine for Salesforce	Movius Corporation	1.21	1.21 Release Notes

6. After the upgrade, the latest version of the MultiLine for Salesforce application will be listed in **Installed Packages**.
7. Go to **Setup > Named Credentials** and delete the entry for the MultiLine for Salesforce application under **Named Credentials**.
 - **Note:** This will be whatever it was labeled when created.

Step 2: Start Registering MultiLine

1. Open **App Launcher** and open **MultiLine Registration**.
2. Select **MultiLine site** under **Configure Site** and click **Configure**



3. Click Register Webhooks tab and enter the information in the fields below:

Register Server

Endpoint Name

Endpoint URL

Username

Password

1. Click on Add New Server button
2. Enter Endpoint Name
3. Enter Endpoint URL
 - **Note:** the Endpoint URL is included in an email that you received with the API user credentials
 - **Example:** https://[MultiLine admin portal URL]:8021
 - **Note:** add port 8021 to MultiLine management portal URL
4. Enter Username/ Password credentials in the email that you received with the API user credentials
4. Click Configure

Step 3: Generate the Certificate

1. To generate the key and certificate run the following OpenSSL command in any Linux server:

```
openssl req -newkey rsa:2048 -nodes -keyout key.pem -x509 -days 365 -out certificate.pem
```

2. This creates `certificate.pem` and `key.pem` files you'll need for the next steps

Step 4: Create Connected App

1. Go to Setup > App Manager and click **New Connected App**
2. Enter Name: `Movius_ConnectedApp` and fill in the **Contact Email** field
3. Click **Save**
4. Go to App Manager > Select `Movius_ConnectedApp` > **Edit**
5. Check **Enable OAuth Settings**
6. Check **Enable for Device Flow**
7. Check **Use digital signatures** and upload the `certificate.pem` file we created earlier
8. Move the following **OAuth Scopes** to **Available**
 1. **Access and manage your data(api)**
 2. **Perform requests on your behalf at any time (refresh_token_offline_access)**
9. Select the checkbox for **Require secret for Web Server Flow**
10. Click **Save**
11. Click **Continue**

Step 5: Manage Connected App

Connected App Name
Movius_ConnectedApp

Save Cancel

To publish an app, you need to be using a Developer Edition organization with a namespace prefix chosen.

Basic Information

Connected App Name:

API Name:

Contact Email:

Contact Phone:

Logo Image URL:

Icon URL:

Info URL:

Description:

API (Enable OAuth Settings)

Enable OAuth Settings:

Enable for Device Flow:

Callback URL:

Use digital signatures:

EMAILADDRESS=jinsputhoor@gmail.com, CN=sfdc, OU=mvv, O=movius, L=bangalore, ST=karnataka, C=IN 20 Jun 2021 10:37:31 GMT

Choose File No file chosen

Selected OAuth Scopes

Available OAuth Scopes	Selected OAuth Scopes
<ul style="list-style-type: none"> Access and manage your Chatter data (chatter_api) Access and manage your Eclair data (eclair_api) Access and manage your Wave data (wave_api) Access custom permissions (custom_permissions) Access your basic information (id, profile, email, address, phone) Allow access to your unique identifier (openid) Full access (full) Provide access to custom applications (visualforce) Provide access to your data via the Web (web) 	<ul style="list-style-type: none"> Access and manage your data (api) Perform requests on your behalf at any time (refresh_token, offline_access)

Add Remove

Require Secret for Web Server Flow:

Introspect All Tokens:

Configure ID Tokens:

Enable Asset Tokens:

1. Click Manage
2. Click Edit Policies
3. From the Permitted Users dropdown, select Admin approved users are pre-authorized
4. Click Save
5. Click Manage Profiles
6. Select System Administrator
7. Click Save

Step 6: Create Integration Profile

Configure Site Register Webhooks **Integration User Configuration**

Static Resource Name *

Consumer Key *

Consumer Secret *

Integration Username *

Reconfigure

1. Create a profile for Movius Integration User
2. Clone with System Admin
3. Click Save
4. Click Edit
5. Select Movius_ConnectedApp created earlier
6. Under Administrative Permissions, select Apex REST Services
7. Select API enabled
8. Under Standard Object Permissions, give read access to below:
 - o Account
 - o Contact
 - o Opportunities Objects
9. Under Custom Object Permissions section, give create, read and edit access to below Custom Objects:
 - o MultiLine Log
 - o MultiLine Configuration

- MultiLine Messages
10. Click Save

Step 7: Create Integration User

1. Create new user as **Movius Integration User**
2. Enter **Profile** as **Movius Integration User**
3. Complete the rest of the mandatory fields

Step 8: Create Static Resources

The screenshot shows the 'Static Resources' configuration interface. At the top, there's a 'SETUP' header and a 'Static Resources' title. Below that, the 'Static Resource Edit' section contains 'Save' and 'Cancel' buttons. The 'Static Resource Information' section includes a legend 'I = Required Information' and the following fields:

- Name:** Movius_Static_Resource
- Description:** Movius_Static_Resource
- File:** Choose File key.pem
- Cache Control:** Public

 At the bottom of this section, there are 'Save' and 'Cancel' buttons.

1. Go to **Setup > Static Resources** and click **New**
2. Complete **Name** and **Description** fields
3. Upload the **key.pem** file created earlier
4. Set **Cache Control** to **Public**

Step 9: Configure Integration User

The screenshot shows the 'Integration User Configuration' page. It has a breadcrumb trail: 'Configure Site > Register Webhooks > Integration User Configuration'. The form contains the following fields:

- Static Resource Name:** privacy
- Consumer Key:** 3M056L83ApxC_R0-520628u015B00E3u6WvuuuakfrcChy0E3LMarVwqj_UvuuL5d8FjpsadMM1B
- Consumer Secret:** *****
- Integration Username:** *****@orin.com

 A 'Configure' button is located at the bottom of the form.

1. Open **App Launcher** and open **MultiLine Registration**
2. Click on **Integration User Configuration**
3. **Static Resource Name:** copy+paste the name created earlier
4. **Consumer Key:** copy+paste key from **Connected App** created earlier
5. **Consumer Secret:** Copy+paste secret from **Connected App** created earlier
6. **Integration Username:** Use the integration user created earlier

Step 10: Reconfigure Users

1. For all users, clear **MultiLine** and **MultiLine Registration Date** fields inside **User Settings** and click **Save**
2. Change the **User Profile** to one without **MML Permissions** or remove the **MML Permissions** from user's **Assignment**



How to join the MultiLine beta testing program

Last Modified on 10/29/2021 6:12 pm EDT

Thank you for trying out the beta release of a MultiLine application.

Depending on your smartphone's operating system, first you'll need to download a testing app on the phone you will use for testing:

- iPhone (iOS) users will download TestFlight
- Android users will download Firebase

Important Note: You'll want to download the testing app first prior to downloading the MultiLine app or activating it using a MultiLine invitation. If you've previously downloaded the MultiLine app, uninstall it prior to beginning beta testing.

Select your smartphone operating system below:

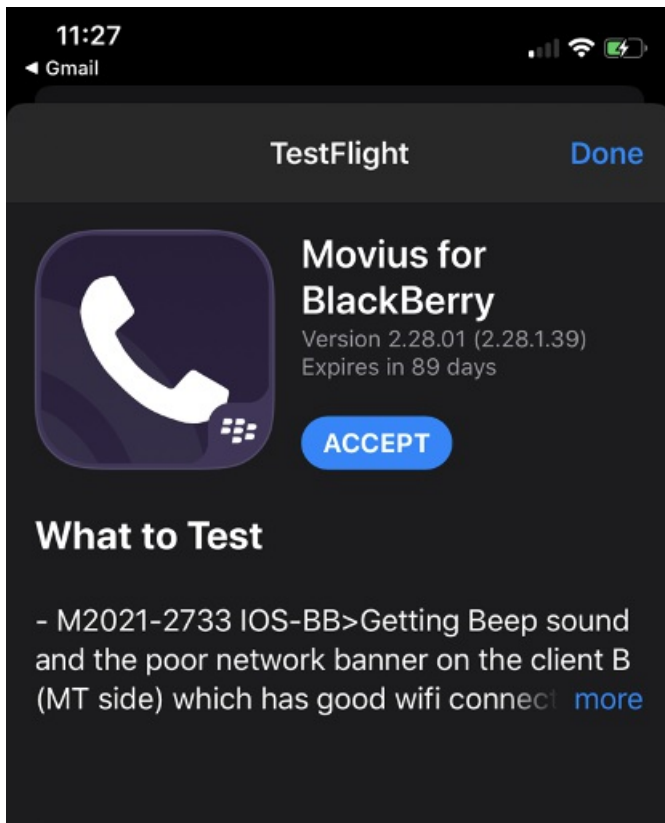
iOS

Step 1: Download TestFlight

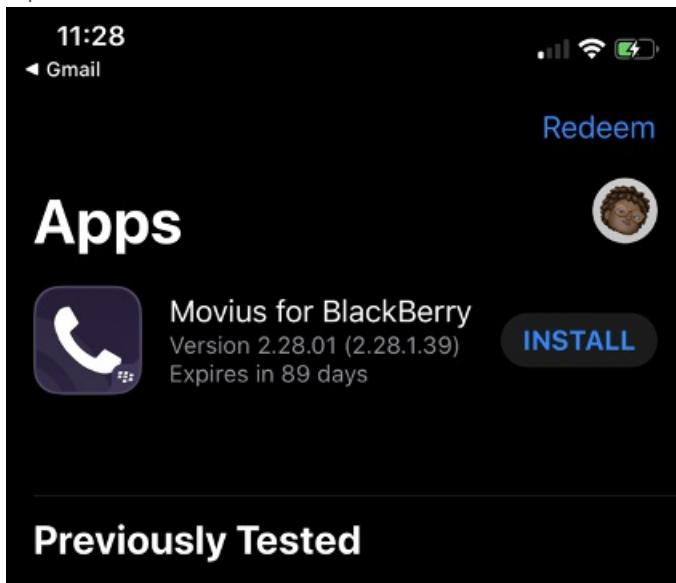
Search "TestFlight" in the App store and download the app.

Step 2: Use your phone to check email for the TestFlight invitation

1. Open the email and tap the **Accept** button in the email invitation.



2. Tap the Install button.



Step 3: Check your email for your MultiLine invitation to activate your service

If you're new to MultiLine, see [Get Your Invitation](#) for detailed instructions on activating MultiLine. If you're not new to MultiLine, you can use the same invitation and credentials you've used previously to activate the app. If you can't find your invitation, contact your IT administrator to be sent a new one.

Note: Leaving the beta testing program

To leave the program, uninstall the tester app. Then you can go to the App store and download the latest MultiLine app, or download it using your invitation. You can use the same invitation and credentials to activate.

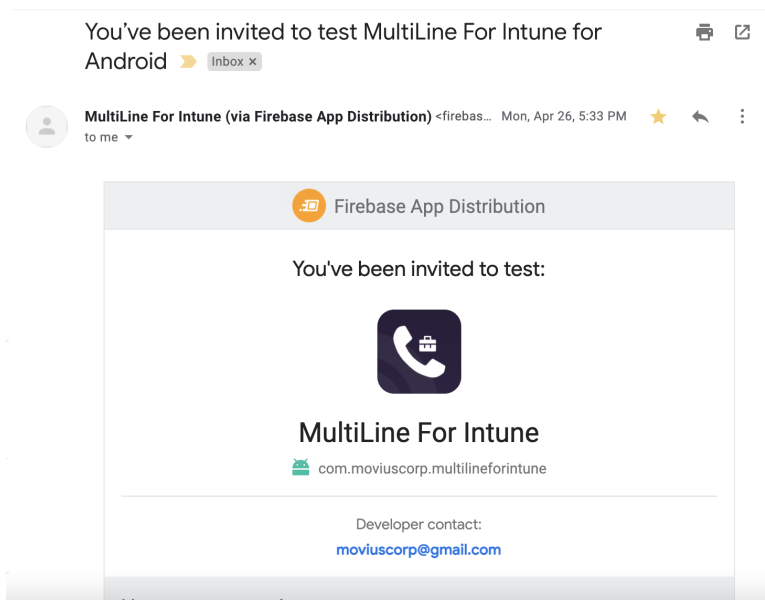
Android

Step 1: Download Firebase App Tester app

Search "Firebase App Tester" in the Play Store and download it.

Step 2: Use your phone to check your email for the Firebase invitation

1. Open and read the invitation email as it includes important instructions for joining the test program.



Note:

- The invitation to the test app will be sent to the email your admin used to enroll you into the testing program.
 - Depending on the MultiLine application your organization is using (Ex. Movius for BlackBerry, MultiLine, MultiLine for Intune, etc...) you'll see the invitation for that app.
 - After opening the invitation, you can sign in with any Google account to accept the invitation, not just the account to which the invitation was originally sent.
 - Invitations can only be accepted once before becoming invalid.
2. Click the **Get Started** button to accept the invitation. *You'll be prompted to sign in and accept the Terms and Conditions.*

How to start testing:

- 1 Open this email on your mobile device
- 2 Using your Google account, accept the **MultiLine For Intune** invitation
[Get started](#)
- 3 Enable installations from unknown sources
- 4 Use Firebase App Distribution to download **MultiLine For Intune**
- 5 Start testing!

3. Open the **Firebase App Tester** app. If you're prompted to sign in, use the same credentials as you did to accept the invitation.

4. Select the MultiLine app you were invited to and tap **Download**.

Step 3: Check your email for your MultiLine invitation to activate your service

If you're new to MultiLine, see [Get Your Invitation](#) for detailed instructions on activating MultiLine using the invitation.

If you're not new to MultiLine, you can use the same invitation and credentials you've used previously to activate the app. If you can't find your invitation, contact your IT administrator to be sent a new one.

Note: How to leave the beta testing program

To leave the program, just uninstall the tester MultiLine app, and then you can install the latest MultiLine app from the Play store, or download it using your invitation.

Happy testing!

Thank you again for joining the beta testing program. We highly appreciate your participation and feedback for developing the final version.

Please notify us of any bugs and send us feedback by emailing us using the **Contact Support** feature in the **MultiLine Settings** menu under **Help**.

Where are the API Docs?

Last Modified on 11/03/2021 8:25 pm EDT

Customers who use our API should visit our developer portal at <https://dev-portal.moviuscorp.net/>.

What is your Privacy Policy and CPNI Policy?

Last Modified on 11/02/2021 3:11 pm EDT

Privacy Policy

Movius is committed to maintaining your privacy. We developed our application around the importance of the separation of business and personal. However, some personal information is required for our applications to work for you. You are entitled to know how our MultiLine applications will collect, use, and protect the personal information you give us.

The Privacy Policy describes how we collect and may disclose personal information, including the following:

- What personal information we collect
- How we use it
- How long we maintain it
- When and to whom we disclose it
- How we restrict our use of it for marketing purposes, and
- How we protect your rights concerning it and its disclosure

It's available in-app and online:

- MultiLine App users can view the policy in the Settings menu under Help > Terms and Privacy Policy.
- MultiLine Desktop users can view the policy in their Settings menu under Terms and Privacy Policy.
- Anyone can view the policy at our web site: <https://moviuscorp.com/privacy-policy/>

CPNI

Movius is committed to maintaining the privacy of its customers and subscribers. In addition to protecting your personal information as outlined in Movius' Privacy Policy, we are obliged to give additional protections to certain information about how you use the MultiLine Service provided by Movius. However, that information can help us customize and improve services we offer you.

Read our CPNI Policy at <https://moviuscorp.com/cpni-policy/>

Where can I find your Security Baseline Document?

Last Modified on 11/02/2021 3:08 pm EDT

If you have questions about our access control, database control, data encryption, penetration testing, and vulnerability scanning policies, our Customer Success Team can provide you our Security Baseline Document. Prior to sharing this sensitive information about our security infrastructure, we'll need to have you sign an NDA.

Compliance FAQ

Last Modified on 11/02/2021 3:19 pm EDT

Does MultiLine support TCPA Opt-In/Opt-Out?

Yes. We understand that in highly regulated industries – there are often requirements to capture client opt-in or for the client to enroll in order to text with their advisor.

MultiLine renders this process easy, texting enrollment is built-in with our Opt-In feature. It's a simple process. When the advisor first texts a client – the client will receive a message which allows them to either opt-in to texting by replying “YES” or decline the invitation by replying “STOP” to the text conversation. When they reply “YES” – both the advisor and the client receive an auto-generated message informing of the client's decision – and this message is recorded in the Portal/Archival System/Salesforce – for easy compliance verification. At this point – the conversation can resume as it normally might.

Does MultiLine comply with GDPR Regulations?

Yes. Movius meets the imperatives of GDPR, including privacy by design, explicit consent, data breach notification, and subject access rights.

The Movius MultiLine solution clearly separates personal and business calls and texts in a transparent and auditable way. The platform can demonstrate the necessary degrees of separation required to meet the privacy by design imperative of GDPR. By separating the personal and business communications on a single device, MultiLine can enable compliance standards at a low cost of regulatory oversight and organization can feel confident that they are not in breach of GDPR regulations.

Does MultiLine comply with SOC 2 requirements?

All MultiLine data is encrypted both in transit and at rest, and meets all SOC 2 compliance requirements. Additionally, a security pin can be enabled within the settings of the app, forcing users to enter a pin prior to launching the application.

All business contacts and communications are completely separate and secure, even on an employee's personal phone. MultiLine encrypts voice and text messages, and only very basic call information is stored on the device. The MultiLine app is secured with the same software used to protect the data in other enterprise mobile apps, and the app can be deleted from an employee's personal phone in seconds.

Is MultiLine suitable for HIPPA compliance?

Yes, MultiLine provides HIPAA-compliant texting and calling through a separate mobile phone number, allowing secure communication between caregivers and patients.

- Capture patient consent from text messages through an automated workflow. All patient consent is captured and available as a report in the admin portal.
- Identify PHI related keywords and information to redact or block completely from being shared in text messages.
- Secure communication of PHI between caregivers and patients, with Cloud Data Storage that

is HITECH and HIPAA Certified. All communication data is TLS 256-bit AES encrypted at rest and in transit.

Is MultiLine suitable for FINRA and SEC compliance?

Yes. Despite firms' resistance to monitoring text communications, the reality is the Securities and Exchange Commission (SEC) and Financial Industry Regulatory Authority (FINRA) require that electronic communications used for business purposes are archived and supervised—including text messages.

Key points from the Notice include:

- Recordkeeping: Firms are reminded of their obligation to keep records of business communications under SEC Rule 17a-4(b)(4). Also, firms must train and educate their advisors regarding the distinction between business and personal communications, and the requirements to retain, supervise, and produce business communications.
- Text messaging: Firms that communicate or allow advisors to communicate through text messaging or chat services for business purposes must retain records of those communications, in compliance with SEC and FINRA rules.

MultiLine offers built-in capturing capabilities for all MultiLine texts at an enterprise scale. This happens automatically in the cloud and never requires end-user action. You can easily search and download all of these records in our secure Admin Portal, where we can store them for a predefined period of time.

Link to FINRA notice: https://www.finra.org/sites/default/files/notice_doc_file_ref/Regulatory-Notice-17-18.pdf

Link to SEC rules: <https://www.sec.gov/files/OCIE%20Risk%20Alert%20-%20Electronic%20Messaging.pdf>

Is MultiLine suitable for MiFID II and FCA COBS 8.11 compliance?

Yes, Movius MultiLine enables compliance with MiFID II and FCA COBS 11.8, including the requirement to produce all communications related to a trade upon the request of a regulator, including mobile calls and texts, no matter whether the phone is corporate or privately owned. It brings the compliance, retention, archiving and eDiscovery capabilities that banks require while easily capturing, recording, storing and analyzing mobile voice and text communications.

Link to MiFID II: https://www.esma.europa.eu/sites/default/files/library/esma35-43-349_mifid_ii_qas_on_investor_protection_topics.pdf

Link to FCA: <https://www.handbook.fca.org.uk/handbook/ICOBS/Sch/1/1.html>

Is MultiLine suitable for Dodd-Frank and GLBA compliance?

Yes. MultiLine ensures secure and private attorney/client and third-party communications to protect sensitive client data in accordance with Dodd-Frank and Gramm-Leach-Bliley Act (GLBA).

Movius Corporation assumes no liability for the accuracy or completeness of this information.

Please consult with an attorney for specific information on specific rules and regulations and how they apply to your business.

Is MultiLine ISO certified?

Yes, Movius MultiLine is ISO 27001:2013 and ISO 9001:2015 certified.

Is MultiLine voice and text capture compatible with SIPREC technology?

Yes. If your organization needs SIPREC, we can work with you to set it up.

Can MultiLine prove that data moving over its network hasn't been intercepted and changed?

- Data stored on the apps consist of Call history, SMS history and voicemail.
- All data between the client and server is encrypted
 - SIP over TLS uses **SHA2 with RSA**
 - Secure RTP SRTP between client and server uses **AES_CM_128_HMAC_SHA1_80**
 - Restful WEB Services uses **HTTPS**
- The Movius for Blackberry apps (Android and iOS) communicate via POST with the server hence the data between the client and server cannot be viewed by a third party.
- SSL Pinning ensure that the client checks the server's certificate against a known copy of that certificate only, which ultimately prevents a man in the middle attack.
- For Movius for Blackberry Android app, the application uses SQL cipher that performs transparent and on the fly encryption to DB.
- For Movius for Blackberry iOS app, the application uses Core data enabled with Data Protection Options and SQL Cipher to encrypt the DB.

How is MultiLine data captured and how is it stored?

Built-in call and SMS recording capabilities are provided by the Movius platform to comply with regulatory requirements (FCA, MiFID II, Dodd-Frank, HIPAA) and corporate policies.

The default behavior of the Movius platform is for voice and SMS recordings to be created as they traverse the Movius platform and stored for a period of 72 hours for customers to retrieve them for archiving purposes in their respective secure data repository solutions.

Note that the recording is done ONLY IF the user is enabled for SMS recording or Voice recording or both Voice and SMS recording.

Access to the recordings is restricted to Administrators in the Management Portal granted the designated role and the CSV offload process. No other users will have access to these recordings.

All SMS data and Voice and SMS metadata is encrypted and stored in a text archive. All metadata recordings are encrypted using AES 256 encryption. Voice recordings are stored in raw voice format in a voice archive.

Movius Corporation assumes no liability for the accuracy or completeness of this information.

Please consult with an attorney for specific information on specific rules and regulations and how they apply to your business.
