

# Install Guide: Salesforce Connector

Last Modified on 06/16/2022 3:03 pm EDT

Read this guide to install MultiLine Salesforce connector in the Management Portal. For installing the connector in Salesforce see [MultiLine for Salesforce Installation Guide for Salesforce Admins](https://moviuscorp.knowledgeowl.com/help/multiline-for-salesforce-installation-guide-for-salesforce-admins) (<https://moviuscorp.knowledgeowl.com/help/multiline-for-salesforce-installation-guide-for-salesforce-admins>).

## 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

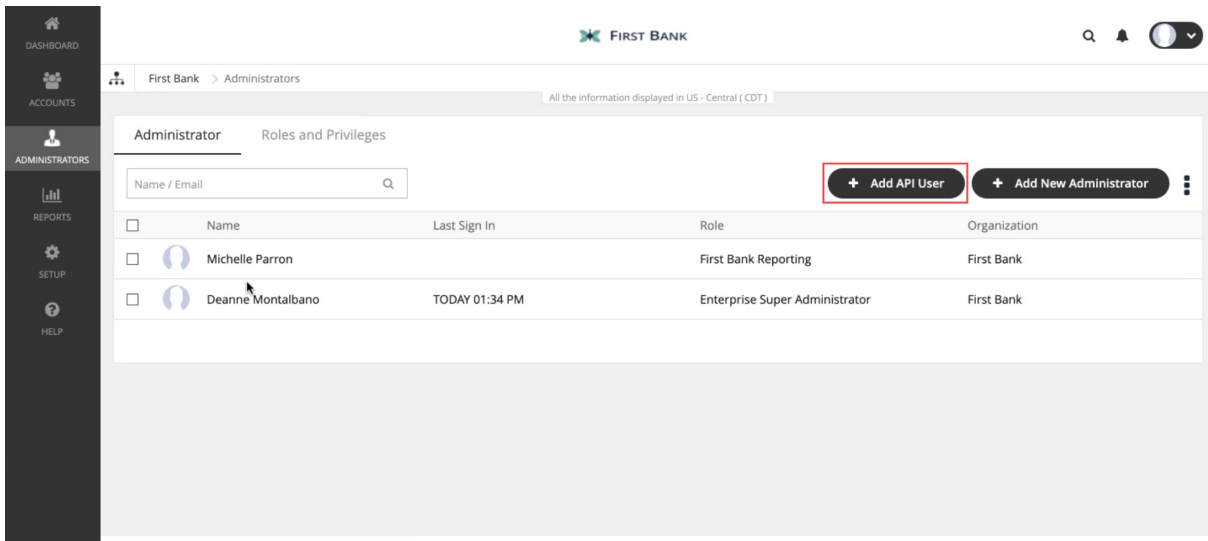
- If possible, perform these steps before adding MultiLine for Salesforce users to the organization.
- An admin must have "Administrators" Role in the organization to do these instructions.  
See [What Admin Roles are in the Management Portal](https://help.moviuscorp.com/help/what-admin-roles-mp) (<https://help.moviuscorp.com/help/what-admin-roles-mp>).

## 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



The screenshot shows the 'Administrators' page in the First Bank Management Portal. The page has a dark sidebar on the left with navigation options: DASHBOARD, ACCOUNTS, ADMINISTRATORS, REPORTS, SETUP, and HELP. The main content area is titled 'First Bank > Administrators' and includes a search bar for 'Name / Email'. Below the search bar is a table of administrators. The table has columns for Name, Last Sign In, Role, and Organization. Two administrators are listed: Michelle Parron (First Bank Reporting) and Deanne Montalbano (Enterprise Super Administrator). A red box highlights the '+ Add API User' button in the top right corner of the table area.

<input type="checkbox"/>	Name	Last Sign In	Role	Organization
<input type="checkbox"/>	 Michelle Parron		First Bank Reporting	First Bank
<input type="checkbox"/>	 Deanne Montalbano	TODAY 01:34 PM	Enterprise Super Administrator	First Bank

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

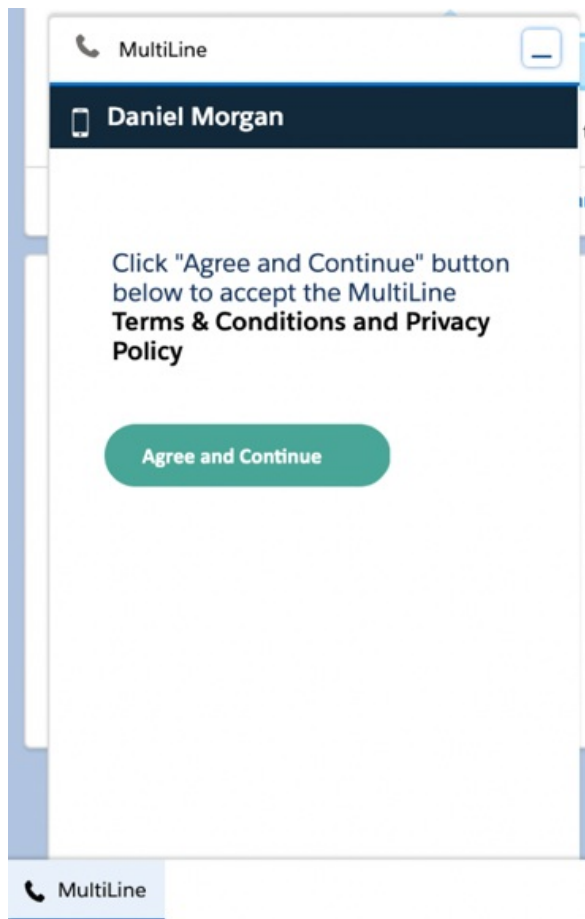
To complete the MultiLine for Salesforce Integration, the Salesforce Administrator needs to complete these steps:

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.



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

