

Product Documents

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Everything you need to know about our products

MultiLine Mobile App Product Document

Welcome to MultiLine.

MultiLine apps are cloud-based communication solution that provides an additional number to your existing cell phone. Now you can easily separate all your business communications through a single app, with independent contacts, call message logs, and voicemail. All personal activity remains private and invisible to the business.

- It works for Android and iOS devices.
- Some MultiLine apps have a special integration with EMMs including Microsoft Intune (MultiLine for Intune) or BlackBerry (Movius for BlackBerry). Movius MultiLine can be deployed under any EMM.
- We offer compliance packages that records SMS and Voice Calls, plays the legally required Call recording prompt, and sends automatic SMS Opt-In messages.
- We offer a Salesforce connector that allows you to send MultiLine SMS through Salesforce.
- We offer a compliant WhatsApp connector that allows you to send WhatsApp messages.

Next, let's have a look through the various mobile app screens.

Call Screens

iOS

1. Recents Screen
 - Your list of recent calls appears here
 - Click anywhere on the call, to place a call
 - Click the blue info icon to see more information, including Call History
2. Messages Screen
 - Your Messages screen contains a list of your SMS, WhatsApp, and Voicemail messages
 - New Messages will display with a blue notification badge and bold text
 - Tap an SMS or WhatsApp message thread to open the Conversation screen
 - Tap a Voicemail Message to play the voicemail
3. New Message Screen
 - In the To: field, enter the phone number, or if the user is in your Contact list, you can enter their name instead
 - Use the Text Message field to enter your message
4. Conversation Screen
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5. Contacts Screen
 - Your Contacts screen contains the list of people in your list
 - If you add a contact to your Favorites, you can choose the Favorites tab to show only these contacts.
 - You can use the Search bar to quickly find a contact.
 - Tap a contact to pull up the Contact Details screen.
6. Contact Details Screen
7. Keypad Screen
8. In Call Screen
9. Data/Minutes tab
10. Settings Screen
11. Call Settings Screen
12. Call Handling screen
13. Manage Availability screen
14. Contact Settings screen
15. Add Contact screen
16. Voicemail Greeting screen
 - Default will play the standard greeting including your phone number
 - Custom greeting allows you to record yourself speaking the entire Voicemail message
 - Click Play to hear your greeting
 - Click Record to record or overwrite a previous greeting
 - Spoken name will allow you to record just your name for including in the standard greeting
17. Sounds Screen
 - Set Ringtone and Vibration settings for Calls, Messages, and Voicemail
18. E911 Settings Screen
 - This setting is only available in the US
 - Emergency responders will come to this address if you call 911 and are unable to provide your location
19. Usage Screen
 - See how much data, SMS, and Voice minutes have been consumed by your use within the MultiLine app
20. Help Screen
 - Find the number and email of your IT support team to contact for assistance
 - Sending an email will automatically attach logs that Movius can use to diagnose problems
 - Clicking Knowledge Base brings you to this site :)
 - Run Diagnostics will identify any settings that may interfere with expected behavior of the app
 - About Us will display information about Movius and the current version of the app
 - Terms and Privacy Settings displays the agreements between us and you as long as you choose to use MultiLine apps

- Privacy Settings is only visible to users under GDPR and allows you to opt in or out of sharing data required for MultiLine services

Android

1. Calls screen
2. Calls Setting Menu
3. Messages screen
4. New Message screen
5. Conversation screen
6. Contacts screen
7. Contact Details screen
8. Settings Menu screen
9. Calls Settings screen
10. Manage Availability screen
11. Contact Settings screen
12. Add Contact screen
13. Voicemail Greeting screen
 - Default will play the standard greeting including your phone number
 - Custom greeting allows you to record yourself speaking the entire Voicemail message
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16. Usage screen

- See how much data, SMS, and Voice minutes have been consumed by your use within the MultiLine app

17. Help screen

- Find the number and email of your IT support team to contact for assistance
- Sending an email will automatically attach logs that Movius can use to diagnose problems
- Clicking Knowledge Base brings you to this site :)
- Run Diagnostics will identify any settings that may interfere with expected behavior of the app
- About Us will display information about Movius and the current version of the app
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MultiLine Desktop Product Document

Read on to learn about 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.

System Requirements

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

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.

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.

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** (<https://help.moviuscorp.com/user-web-client-calls/swap-calls-in-multiline-desktop>), 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** (<https://moviuscorp.knowledgeowl.com/help/getting-started-with-multiline-call-handling-sequential-and-simultaneous-dial-do-not-disturb-call-forwarding>)
 - 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.

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

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:
 2. User is not in contacts:
 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.

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:
 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**.

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.

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.

Movius for BlackBerry Product Document

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

Overview

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

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.

MultiLine for Salesforce Product Document

Read this guide to learn about 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 \(https://help.salesforce.com/articleView?id=quick_text_setting_up.htm&type=5\)](https://help.salesforce.com/articleView?id=quick_text_setting_up.htm&type=5) 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

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.

MultiLine for Intune Product Document

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.

WhatsApp Messaging Connector Product Document

Read this to get started with 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.

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.

Microsoft Teams Product Document

Read on to learn about messaging using the MultiLine integration with Microsoft Teams.

Overview

When your organization uses the MultiLine integration with Microsoft Teams, users can message from their MultiLine number in Microsoft Teams.

When messaging someone from Teams according to the below procedure, they'll see the MultiLine number. If someone texts the MultiLine number, the text will be sent to the MultiLine app and Teams.

Messaging

The MultiLine tab is used for messaging.

1. To view MultiLine messages, select the MultiLine utility icon.
2. To send a new message, click the New Message icon.
 - Add at least one participant. You can create a group message by adding multiple participants.
3. Select a row to open the message thread.
4. Orange badges represent new unread messages.
5. Click for menu options.
6. Type your message in the bottom right
 1. Click to select an emoticon
 2. Click or press 'enter' to send the message

Store and Forward with Digital Safe Product Document

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 using SFTP.

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 or 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_<orgid>_UUID.csv

WhatsApp Message Filename Format: monitored_call_archive_YYYYMMDD_<orgid>_UUID.csv

Audio Filename Format: monitored_call_archive_audio_YYYYMMDD_HHMMSS_<orgid>_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 '<r>'. 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_<uuid>.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.

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@gma
il.com","+12567335223","MJ_Hiremath","","mj.hiremath@moviuscorp.com","Hi, How's it going?","2018-10-08 12:01:5
5.120","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","","mj
shiremath@gmail.com","+12567335223","MJ_Hiremath","","mj.hiremath@moviuscorp.com","Hi, How's it going?","20
18-10-08 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@gma
il.com","+12567335223","MJ_Hiremath","","mj.hiremath@moviuscorp.com","r_7dddacca-bf0d-493c-aa7c-1015a457a
40e.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.

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.

Messaging Opt-In Flow Product Document

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.

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] <Employee Name> 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:** <Employee Name> 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 <Employee Name>. 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:** <Employee Name> 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](https://moviuscorp.helpjuice.com/_questions/536520) (https://moviuscorp.helpjuice.com/_questions/536520).

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 every 24 hours.

Redaction Product Document

Read on to learn about Redaction and Lexicon Policies.

Overview

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.

About Redaction

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.

Redaction from a WhatsApp Messaging user

Redaction in an SMS conversation

Arya: Providing Call Quality Feedback Product Document

Read on to learn about the Arya Call Quality Feedback system that can provide your organization valuable data and improves the MultiLine service.

Overview

Our aim is to continuously improve our product to provide a calling experience that is unrivaled by any other application. In 2022, we're implementing a system called Arya that uses automatic logging, user feedback, and AI analysis to identify opportunities to improve the service.

Your organization can opt into two user feedback models: feedback from the Recents page, or prompts after a call.

Providing feedback from the Recents page

With this feedback model, users can provide feedback at any time by going to the recents page.

1. Go to your Calls screen and tap on a recent call.
2. The full list of calls with that caller or contact will appear. Tap the **thumbs up** or **thumbs down** icon for the call.

After a short moment the icon will change color to let you know the feedback has been sent.



Providing feedback after a call

With this feedback model, after users end their call, they'll receive a prompt requesting feedback.

1. After the call ends a notification appears, click the notification to pull up the app screen.
2. The prompt appears providing the thumbs up and thumbs down options.
3. If the user chooses thumbs up, this completes the feedback process. If the user chooses thumbs down, they're asked "What was the issue?" and can answer "Call dropped", "Could not hear the other party", or "Call/Speech delay".

Thank you so much!

- This feature will address MultiLine user's perception vs reality about call quality experiences using MultiLine service.
- The logs collected in this process will assist Customer Service to provide timely resolution of issues.
- Enterprise Admins can receive the aggregate analytical data of the feedback provided by their employees.
- Root cause analysis will assist Movius Partners to solve in a more effective way.

MultiLine integrates with Cisco Unified Communications Manager (CUCM) to mobilize fixed-line business numbers. The integration allows MultiLine to use existing office numbers for secure mobile calling and messaging. End users have a single number with full compliance features that's available on both the desk phone and mobile device.

MultiLine's CUCM integration closes compliance gaps for remote workers, enhances client engagement, and extends the value of your PBX investment. MultiLine integrates with both on-premises and cloud-based CUCM deployments.

Features

- One Inbound Number
 - Calls to the fixed-line number ring simultaneously on the desk phone and mobile device
- Flexible Outbound Calling
 - End users can initiate calls from the desk phone or the MultiLine app (Calls through MultiLine app can be made over Wi-Fi, mobile data and/or cellular network)
- Compliant Mobile Calling
 - Mobile calls can be captured by MultiLine or by call recording solutions integrated with the PBX
- Compliant Mobile Messaging
 - WhatsApp and text messaging can be enabled on the fixed-line number, with optional recording

Benefits

Achieve compliance and continuity while leveraging current PBX infrastructure

- Enable employees to conduct business, compliantly, from anywhere
- Open new messaging channels for compliant customer engagement
- Ensure continuity for customers by retaining existing numbers
- Extend the value and life of your Cisco PBX infrastructure
- Provide a transition path to eliminating costly desk phones

Movius Hosting and Delivery Policies

Download the PDF: [Movius Hosting and Delivery Policies\[90\].pdf](#) 

(<https://dyzz9obi78pm5.cloudfront.net/app/image/id/627bc5a95c74921aac0c3c9d/n/movius-hosting-and-delivery-policies90.pdf>)
