

Admin Guide: Upgrade and register MultiLine for Salesforce

Last Modified on 08/17/2022 12:52 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**

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:
 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

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

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:
 - **Account**
 - **Contact**
 - **Opportunities Objects**
9. Under **Custom Object Permissions** section, give create, read and edit access to below **Custom Objects**:
 - **MultiLine Log**
 - **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

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

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**
-