MultiLine for Salesforce Installation Guide for Salesforce Lightning Admins

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To set up the MultiLine integration into Salesforce Lightning, there are steps that must be followed in the MultiLine Management Portal and in Salesforce Lightning. Read this guide to follow the required steps for the Salesforce administrator.

Overview

This guide is intended for Salesforce Lightning admins. We will let you know when there are prerequisite steps that must be taken by the MultiLine admin.

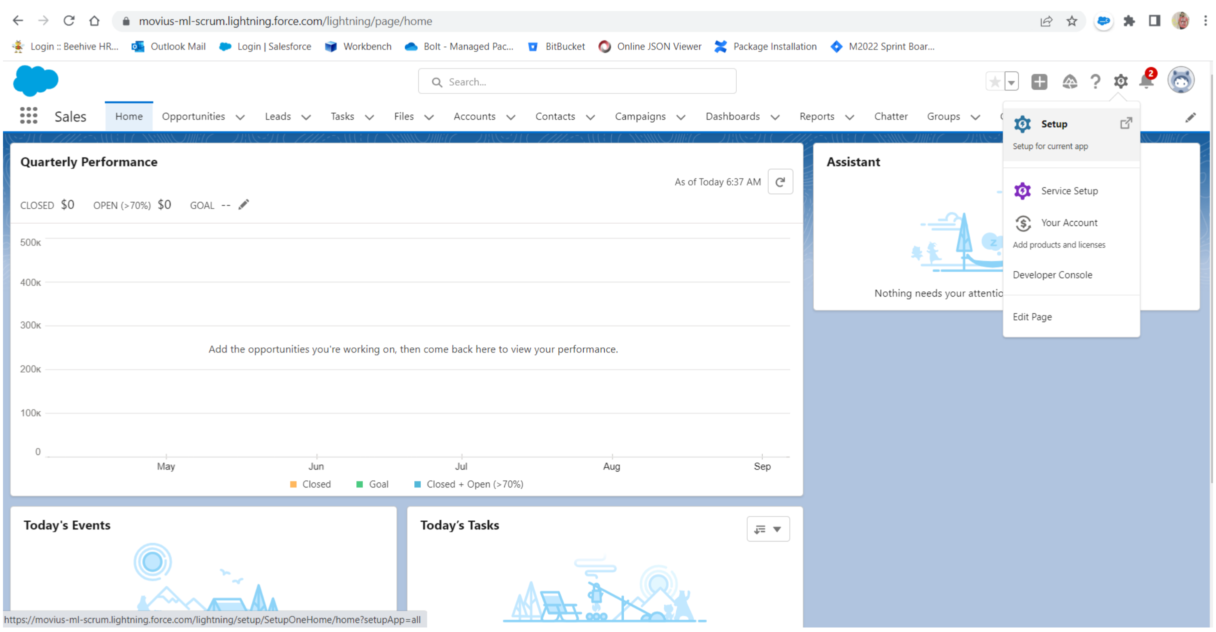
In this guide you will install the package from the App Exchange listing and configure the MultiLine utility and Messages List to appear on **Contacts**, **Leads**, and **Person Account Records** pages for designated Call Center users.

MultiLine Admin Action Needed

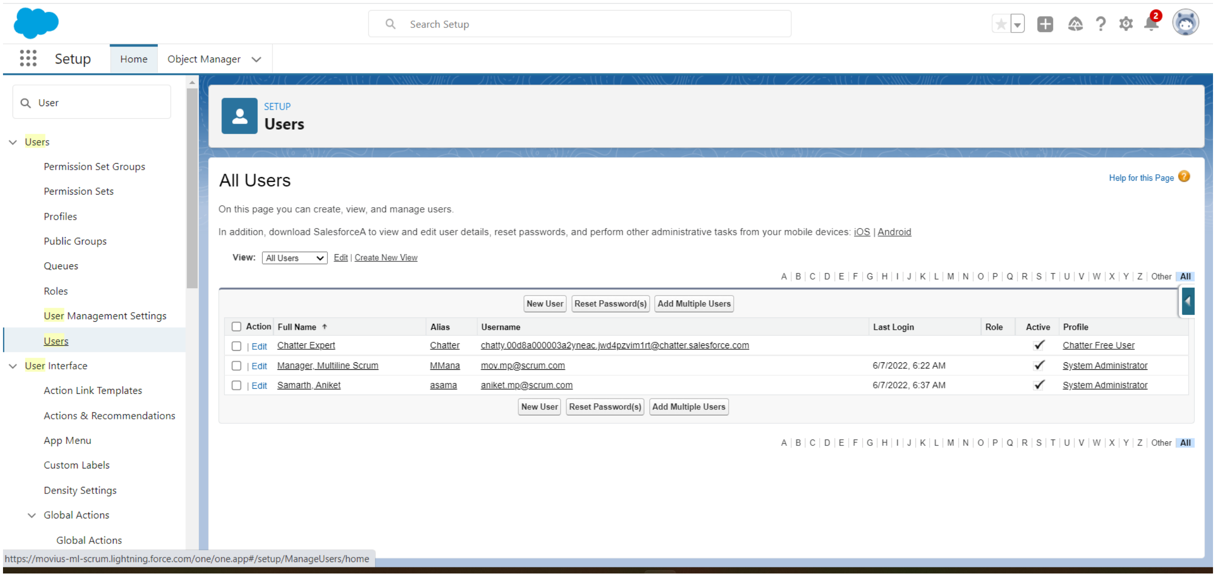
Before proceeding, the MultiLine Admin needs to Create an API User for the Salesforce Admin (https://moviuscorp.knowledgeowl.com/help/multiline-admin-install-guide). When completed, you'll receive a "Welcome Administrator" email, with the credentials you need to get started.

Step 1 - Create user in Salesforce

1. Go to **Setup**.

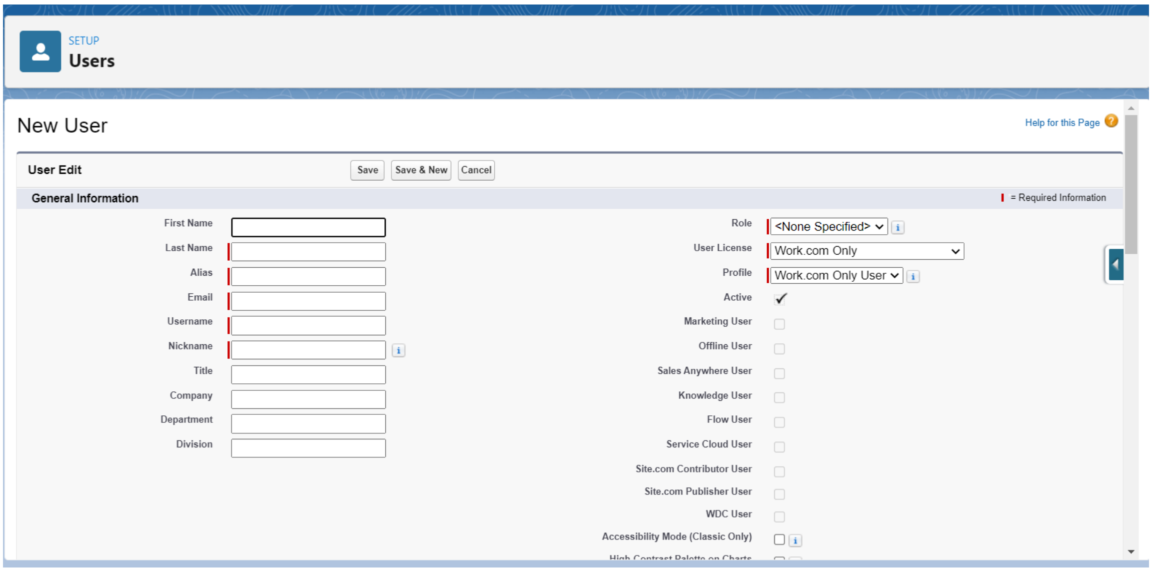


2. Type "Users" in the **Quickfind** box, then click **Users.**



3. Click the **New User** button.

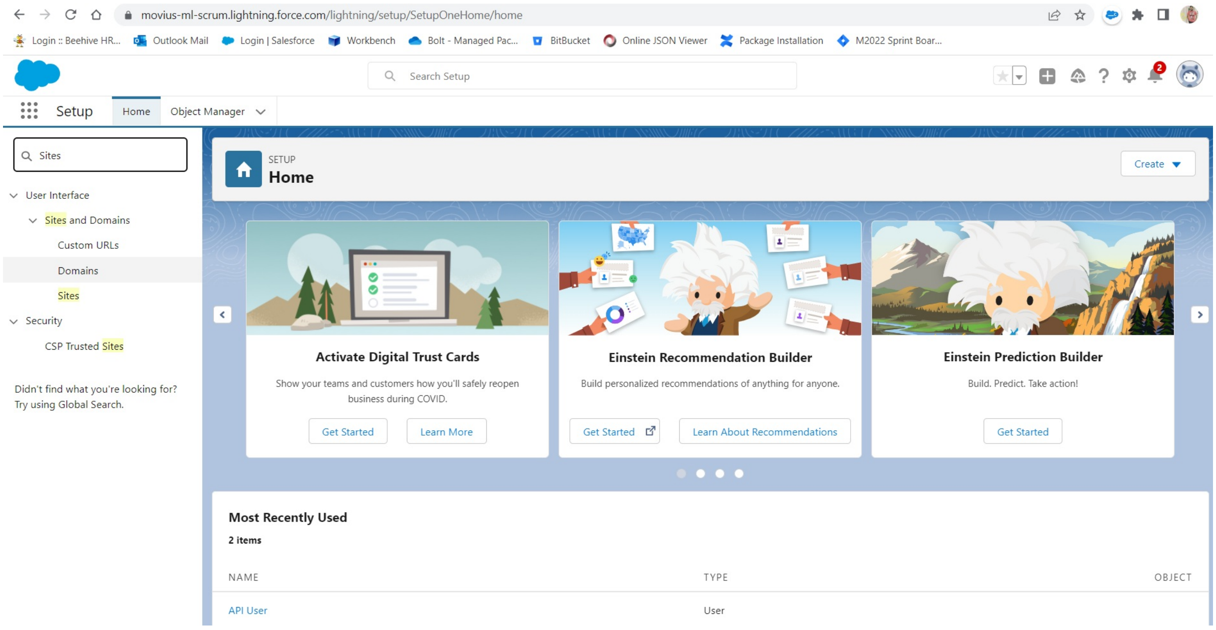
4. Fill in all required information.
    1. For **User License** select **Salesforce**
    2. For **Profile** select **System administrator**



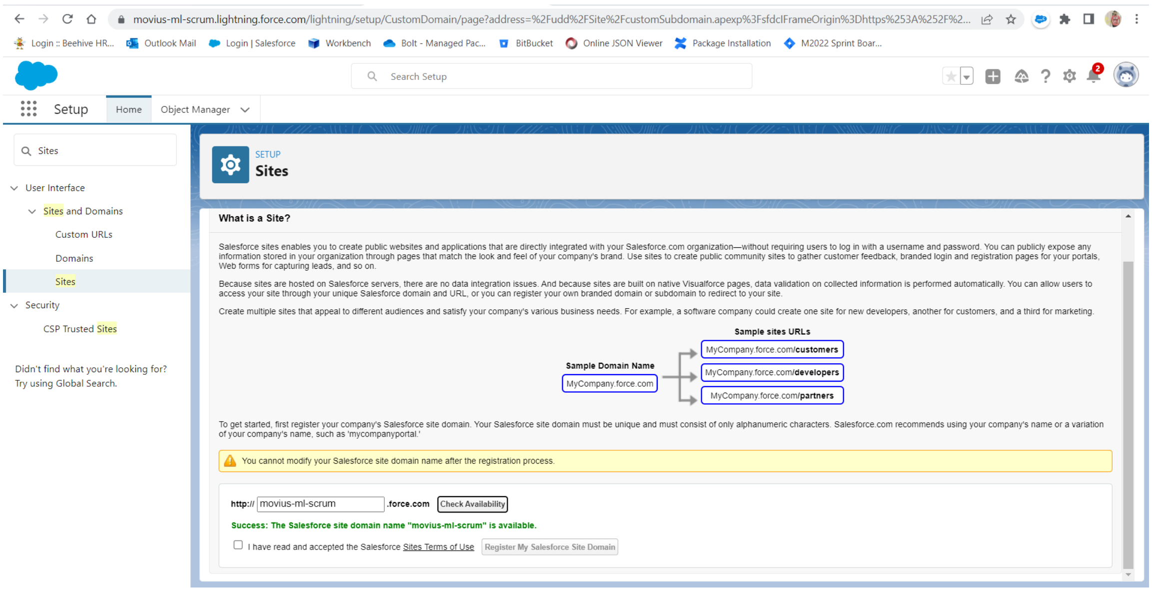
5. Click **Save**.

Step 2 - Set up public site

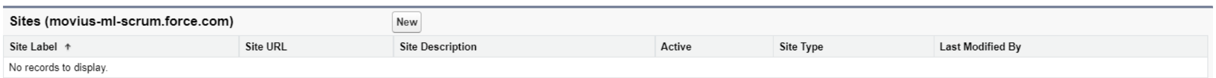
1. Type "Sites" in the **Quickfind** box, then click **Sites**.



2. Deploy a site.
    1. Enter a Domain Name according to the requirements of your organization and click **Check Availability**.
    2. Check the box to accept Terms and Conditions.
    3. Click the **Register My Salesforce Site Domain** button.



3. After you are redirected, click the **New** button.



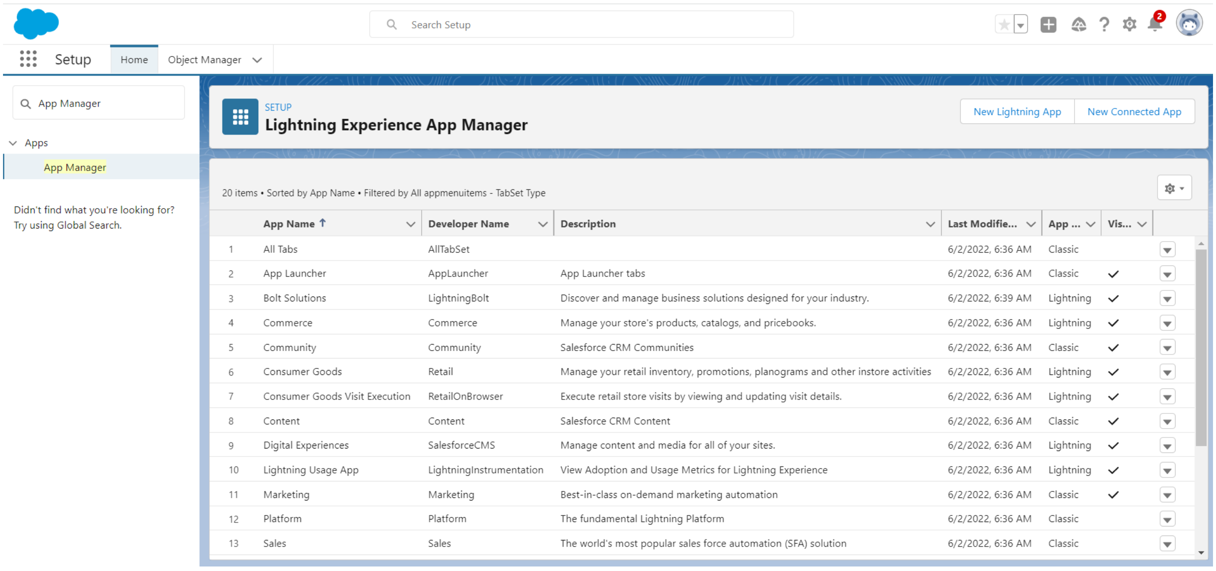
4. Complete the information:
    1. Site Label: **Movius**
    2. Active checkbox: **checked**
    3. Active Site Home Page: **AnswersHome**.
    4. Redirect to custom domain: **unchecked.**
    5. Click **Save**.

Site Label and **Site Name** are case-sensitive. Note that the "M" in Movius is capitalized.

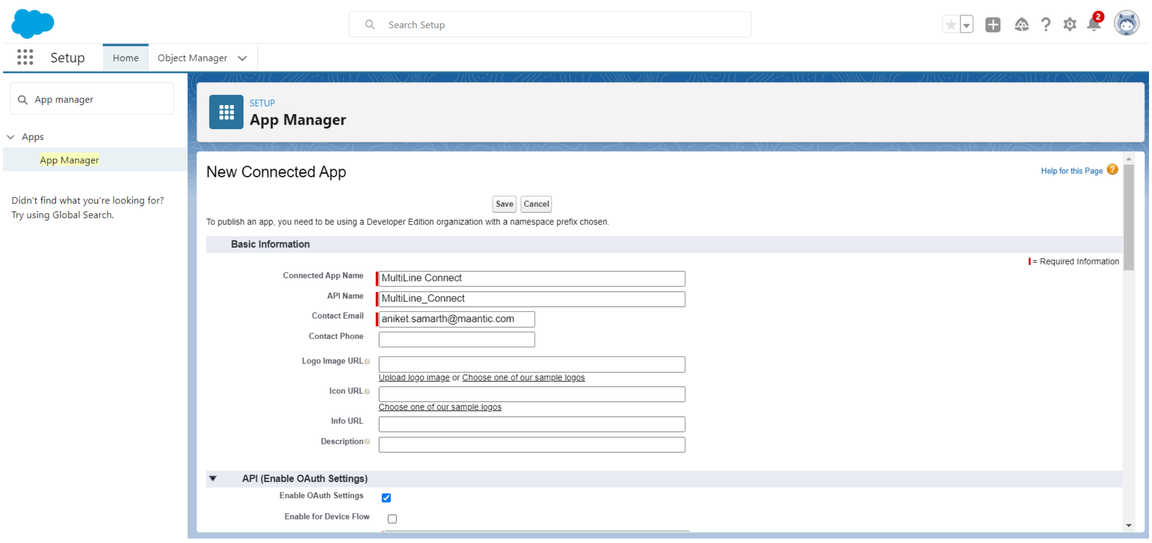
For more information, see Salesforce Help (https://help.salesforce.com/articleView?id=sites_setup_overview.htm&type=5) [external].

Step 3 - Create Connected App

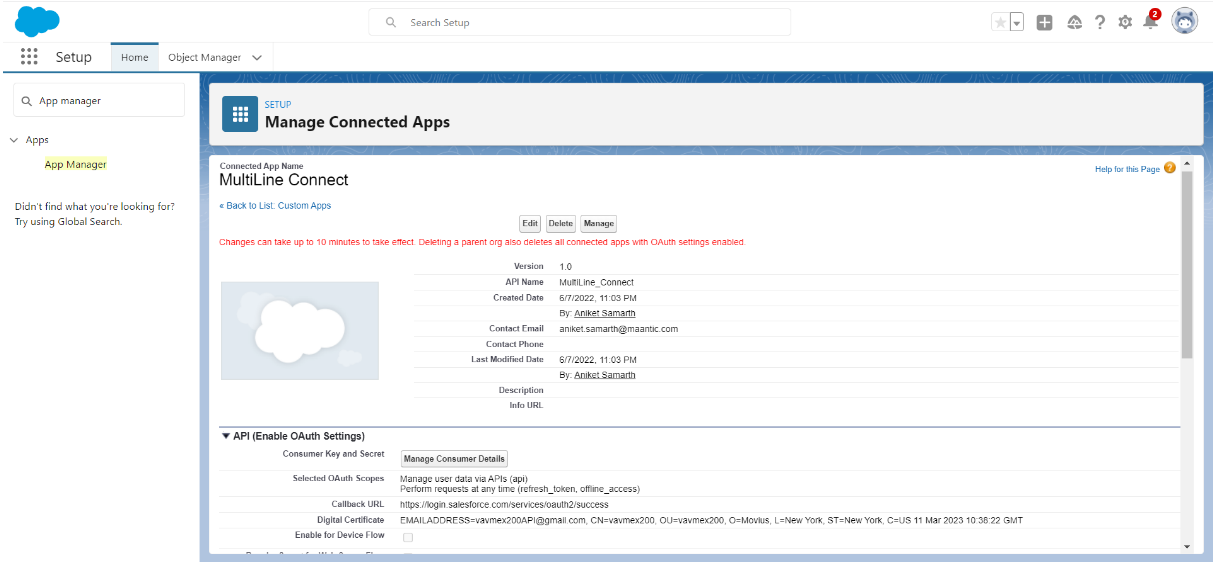
1. Type "App Manager" in **Quickfind** box and click **App Manager**.
2. Click on **New Connected App** button.



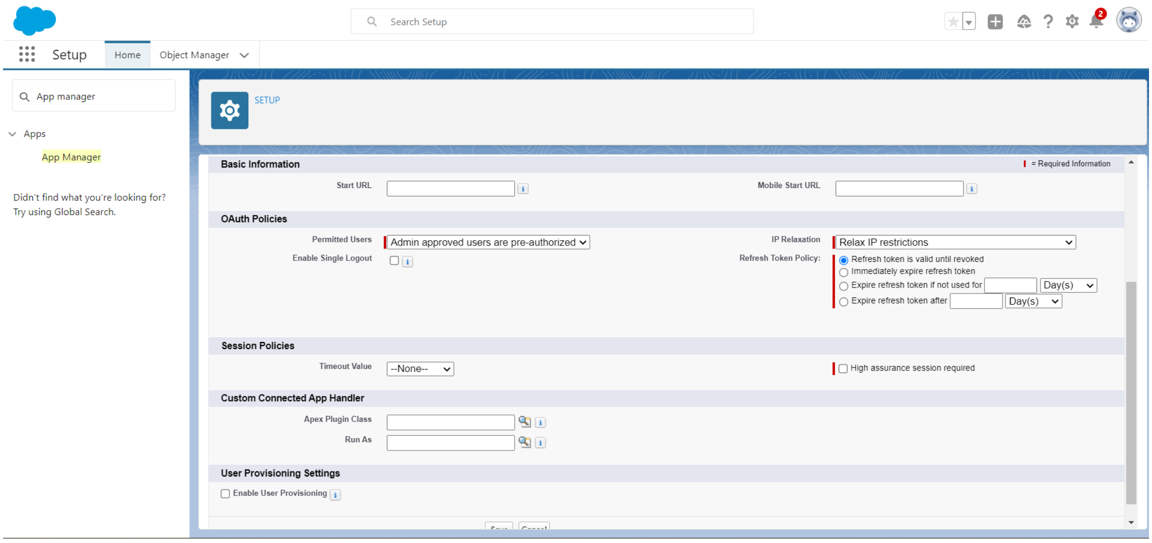
3. Fill out required details.
   1. Callback URL: https://login.salesforce.com/services/oauth2/success
   2. Selected OAuth Scopes:
      1. Manage user data via APIs (api)
      2. Perform requests at any time (refresh_token, offline_access)
   3. Require Secret for Web Server: checked



4. Click **Manage**.

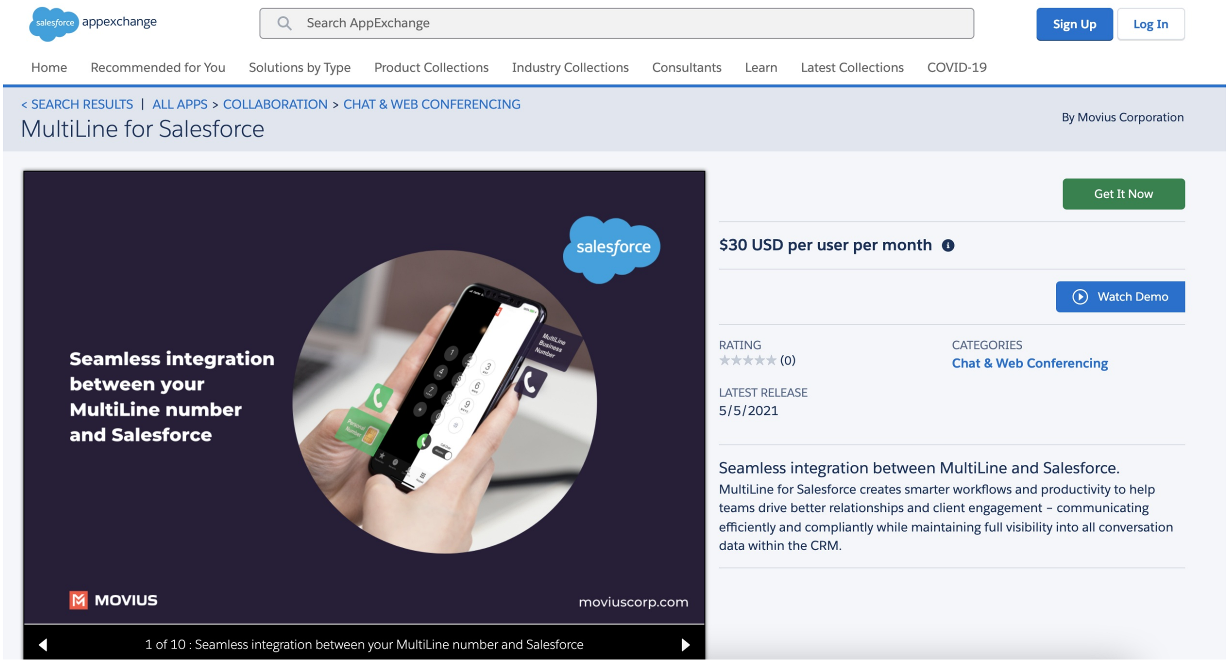


5. Edit **Policies.**
    1. Permitted Users: **Admin approved users are pre-authorized**
    2. IP Relaxation: **Relax IP Restrictions**
    3. Refresh Token Policy: **Refresh token is valid until revoked**
    4. High assurance session required: **unchecked**

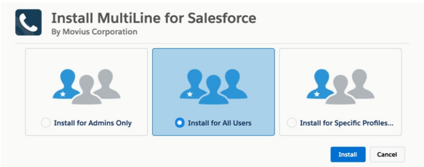


Step 4 - Install MultiLine for Salesforce

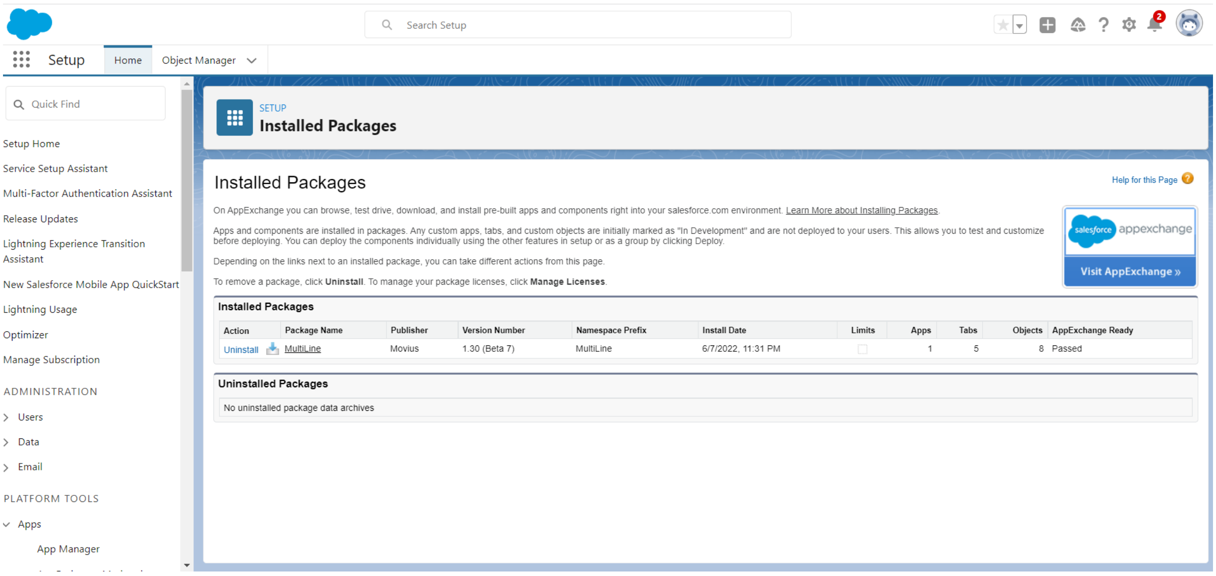
Use these steps to install the MultiLine for Salesforce app package for all users.



1. Search for **MultiLine for Salesforce** on AppExchange (https://appexchange.salesforce.com/) [external] and select it.
2. Click **Get It 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.**

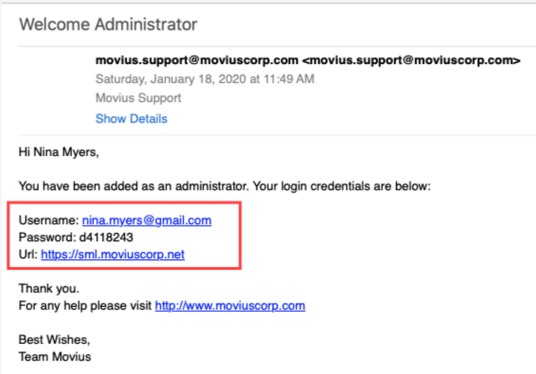


Note: Users won't have access to MultiLine for Salesforce until you add them to the Call Center at a later step

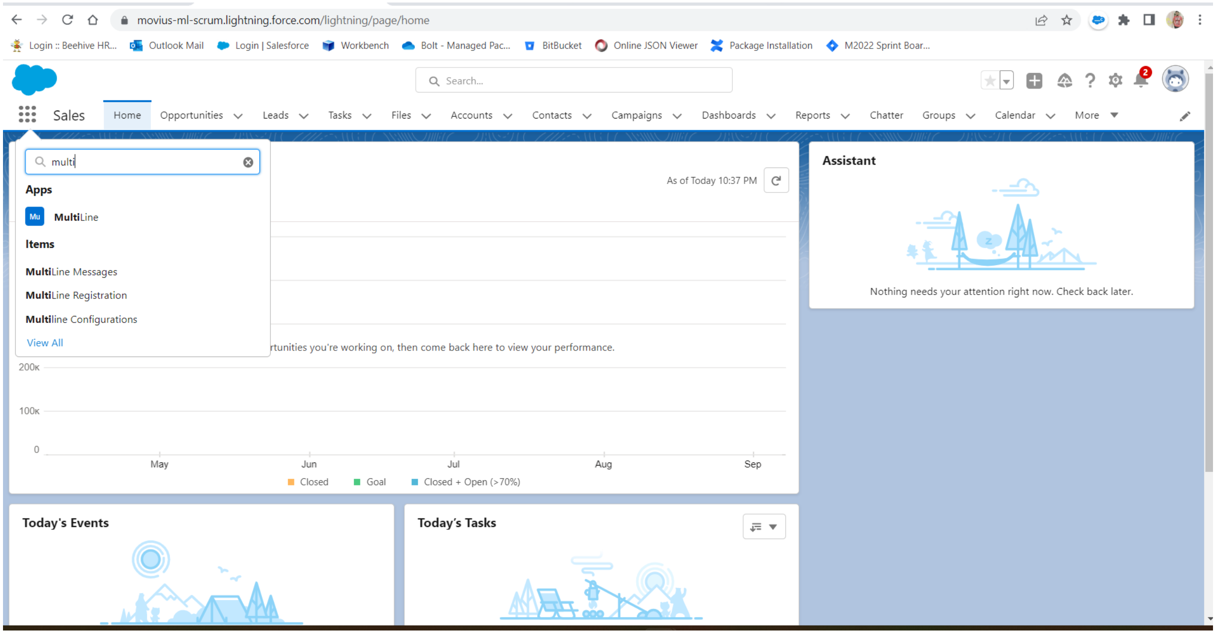
Step 5 - Register MultiLine

To connect MultiLine with Salesforce you need to configure the webhook that exchanges information between the services.

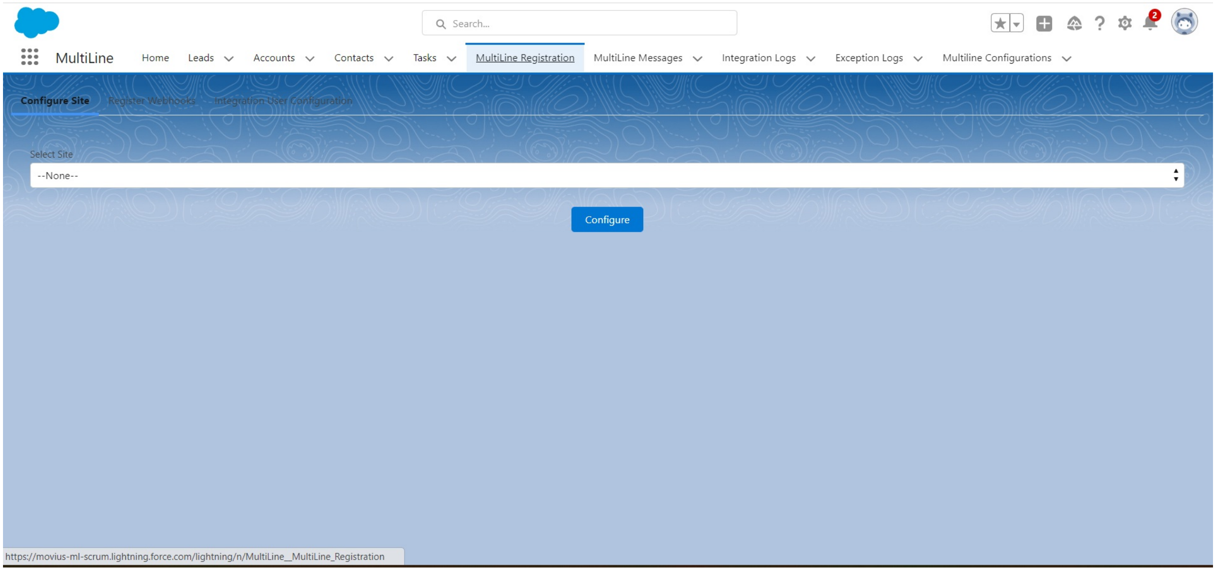
You'll need to refer to your Welcome email for integration credentials:



1. Open **App Launcher** and open **MultiLine Registration.**

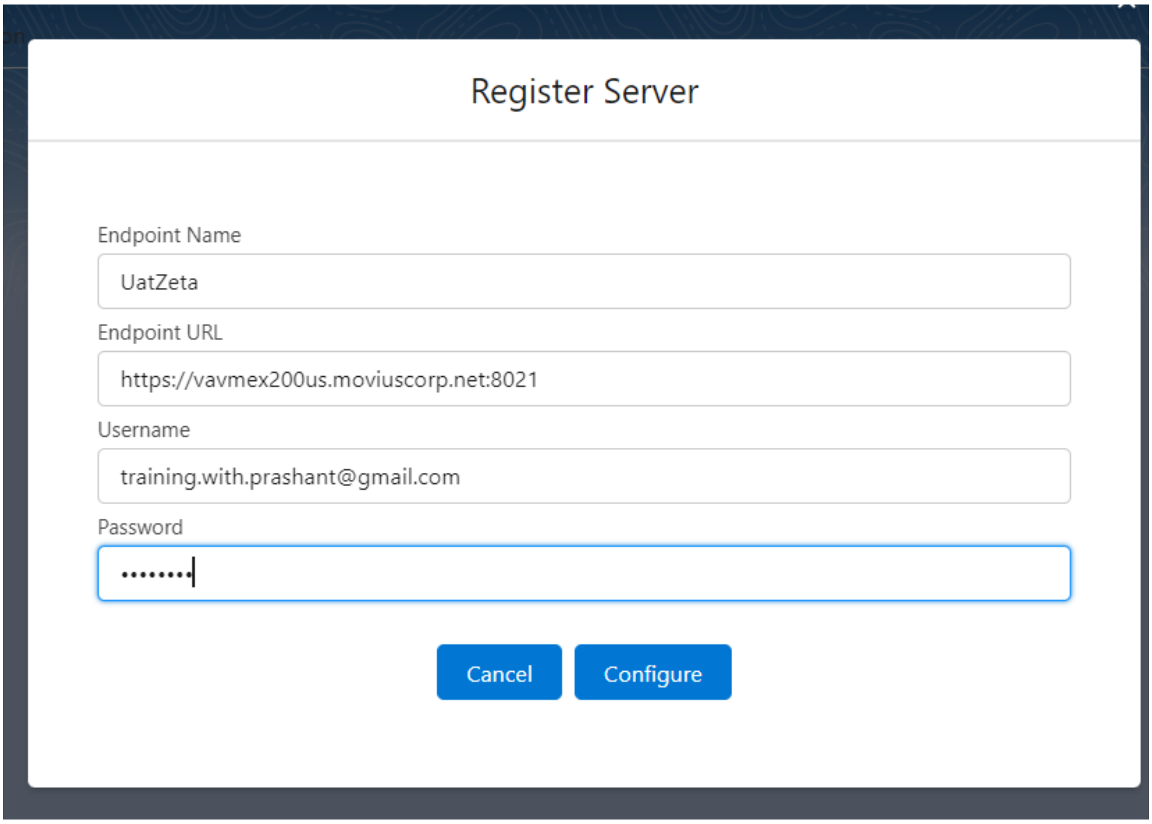


2. In the **Configure Site** tab, select **Movius** from the Select Site menu, then click **Configure**.

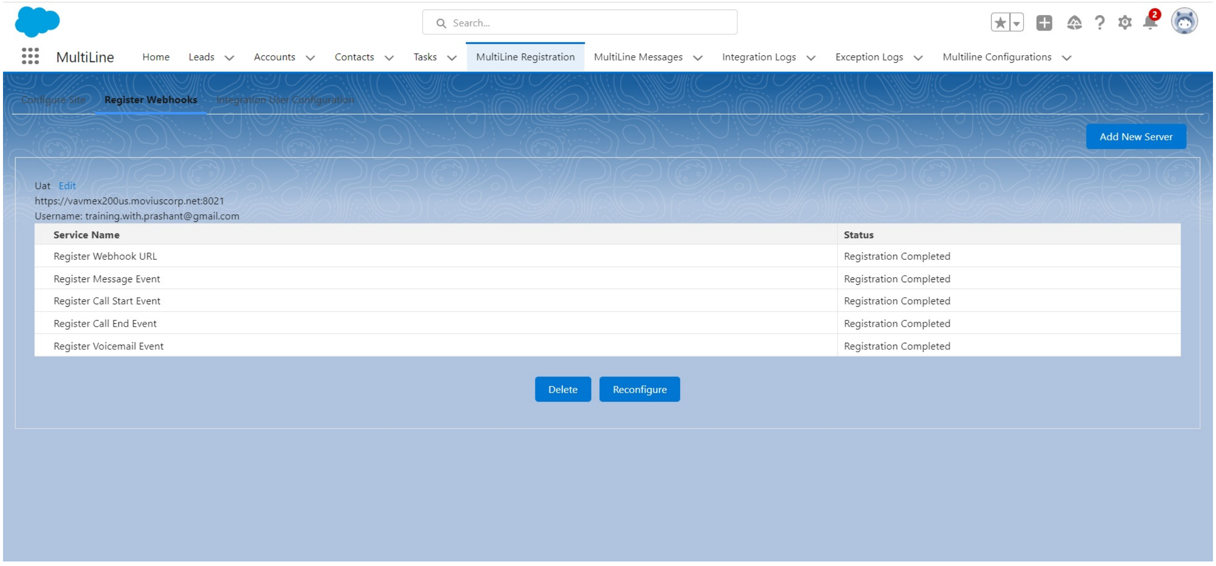


You should see a confirmation message that your site is configured successfully.

3. Click **Register Webhooks** tab and enter the information in the fields below:
   - Endpoint Name: MMP
   - Endpoint: https://[MultiLine Management Portal URL]:8021
     - The MultiLine Management Portal URL is listed in your "Welcome Administrator" email. Add ":8021" for the port.
   - Username and Password credentials from the "Welcome Administrator" email.



4. Your Webhook will now display.



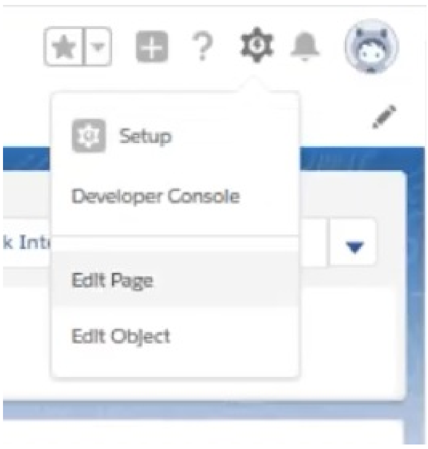
Step 6 - Configure MultiLine Messages List

MultiLine Messages View can be added to **Contacts**, **Leads**, and **Accounts** Pages.

How to Add MultiLine Messages List to Contacts page

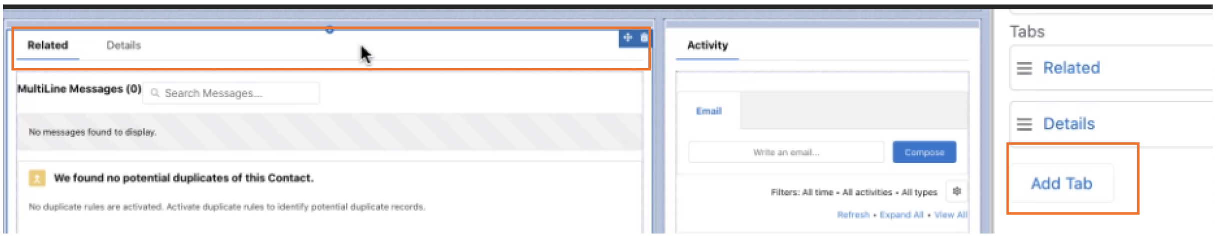
1. Go to the Contacts page and select a **Contact.**
2. Access the **Setup menu in the upper right-hand of the screen.**

3. **S**elect **Edit Page**.



4. Click in the tab area. *By default you see Related and Details tabs.* This will pull up a section in the far right of the screen.

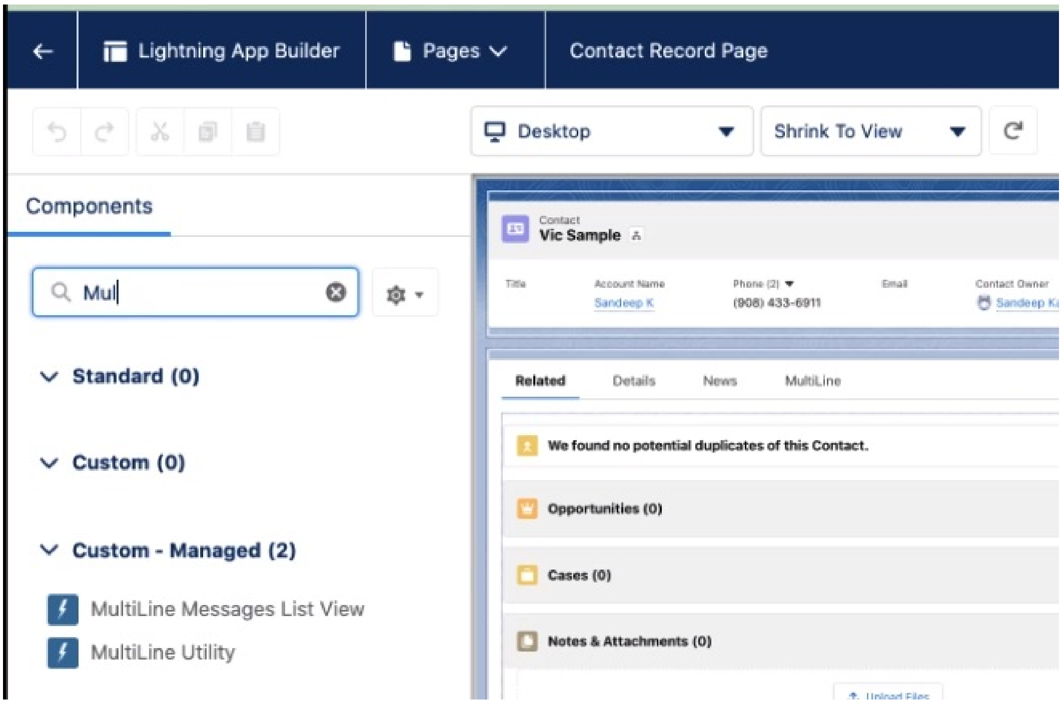
5. Click the **Add Tab** button**.**



6. *By default, the new tab will also be named "Details.* Click the tab once to relabel it.

7. Select **Custom tab label** and name it "**MultiLine"**

8. Find **MultiLine Messages List View** under **Components** in the left-most section



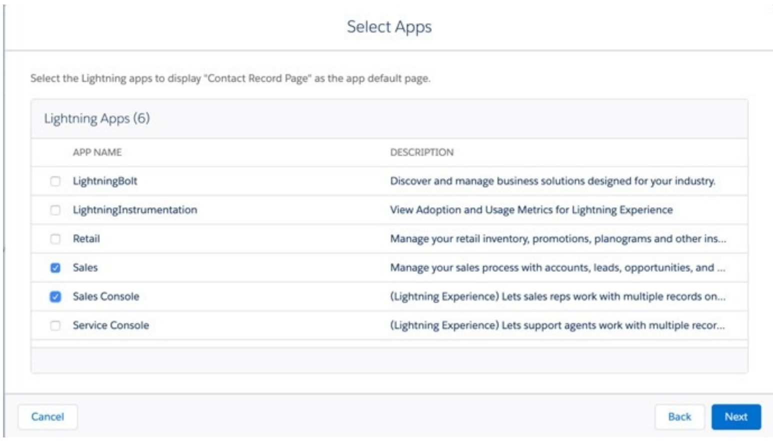
9. Drag it under the **MultiLine** tab.

10. Click **Save.**

11. Click **Activate.**

12. Click **App Default**. Then **Assign as App Default.**

13. Select desired Lightning apps and click **Next** and **Save**.

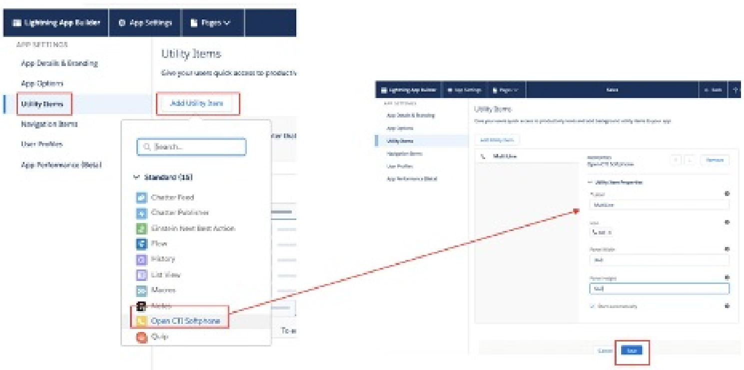


Repeat the steps above for the **Lead** and **Accounts** pages.

Step 7 - Enable Open CTI for Salesforce connector

The MultiLine Salesforce Connector uses the Open CTI Softphone utility for integration. *Learn more about utilities at Salesforce Help* (https://help.salesforce.com/s/articleView?id=sf.dev_apps_lightning_utilities.htm&type=5) [External].

1. Enter "App" in the **Quick Find** box, then select **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 **"Open CTI Softphone"** to "**MultiLine"**
6. Set Panel Width to '**340'** and Panel Height '**540'**
7. Make sure **Start Automatically** checkbox is selected
8. Click **Save**



Step 8 - 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);
```

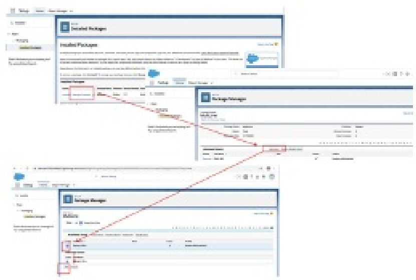
MultiLine Admin Action Needed

Before proceeding, the Salesforce Administrator needs to complete the steps in Configure MultiLine Portal (https://moviuscorp.knowledgeowl.com/help/multiline-admin-install-guide).

Once the MultiLine administrator actions are complete, proceed.

Step 9 - 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 10 - Apply "MultiLine" Permissions set to users

1. Search **Permission Sets** using the **Quickfind** box.

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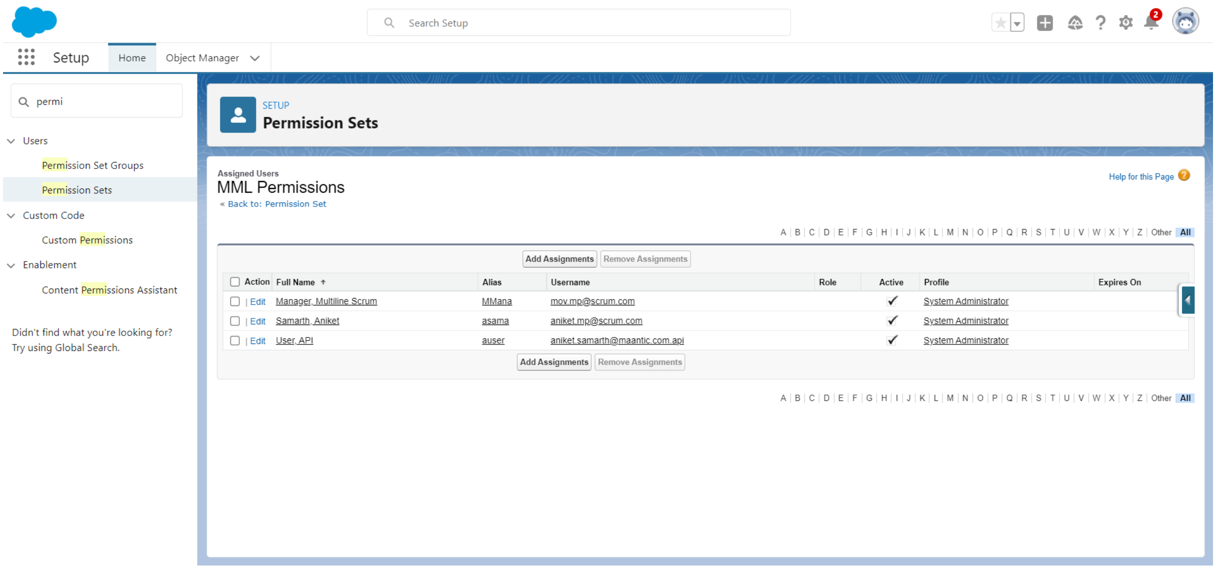
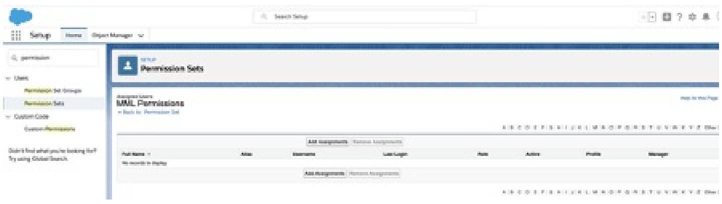


2. Click **MML Permissions**
3. Click **Manage Assignments**
4. Click **Add Assignments**



Step 11 - 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**

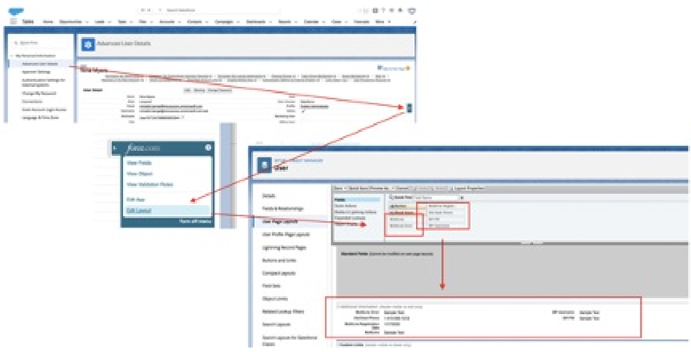
For Bulk User Import, please see Bulk User Import Configuration for Salesforce (https://moviuscorp.knowledgeowl.com/help/bulk-user-configuration).

Step 12 - 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: we recommend not granting MultiLine users **Edit** abilities in the **Additional Information** section.



Re-registering users

If the user sees any error (ex: “WebRTC details not found”) in the MultiLine 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.

De-provisioning users

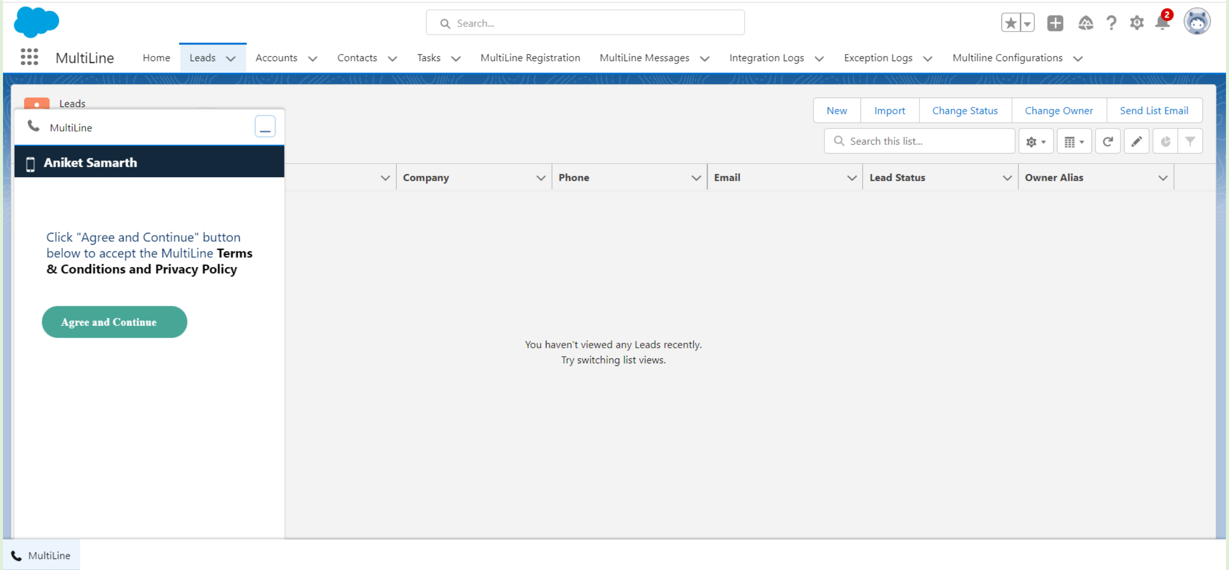
If the user needs to be deprovisioned from using MultiLine for Salesforce,

1. Clear **MultiLine** and **MultiLine Registration Date** as shown in the above steps.
2. Change the user Profile to the one that doesn't have MultiLine Permissions or remove MultiLine from user’s Assignment

Congratulations!

This completes the configuration of the Salesforce connector for MultiLine. 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.



See Using MultiLine for Salesforce (https://moviuscorp.knowledgeowl.com/help/multiline-for-salesforce-user) for End-User instructions.