

MultiLine for Salesforce Installation Guide for Salesforce Lightning Admins

Last Modified on 01/13/2023 9:57 am EST

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.

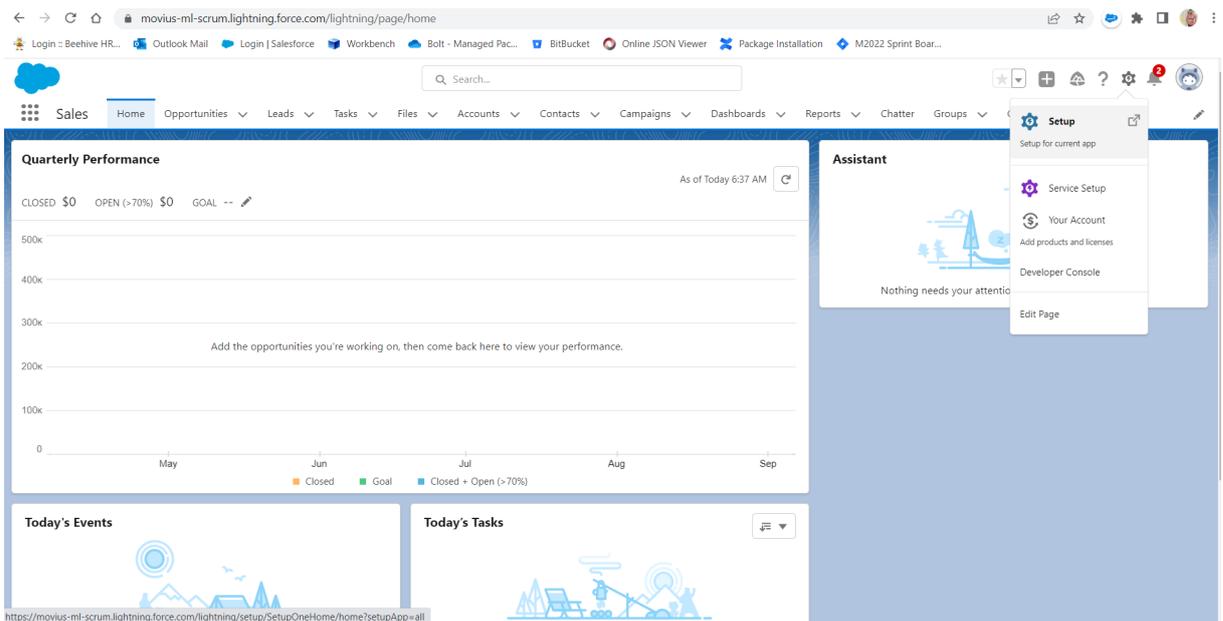
In this guide you will install the package from the App Exchange listing and configure the MultiLine utility and Messages List to appear on **Contacts**, **Leads**, and **Person Account Records** pages for designated Call Center users.

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.

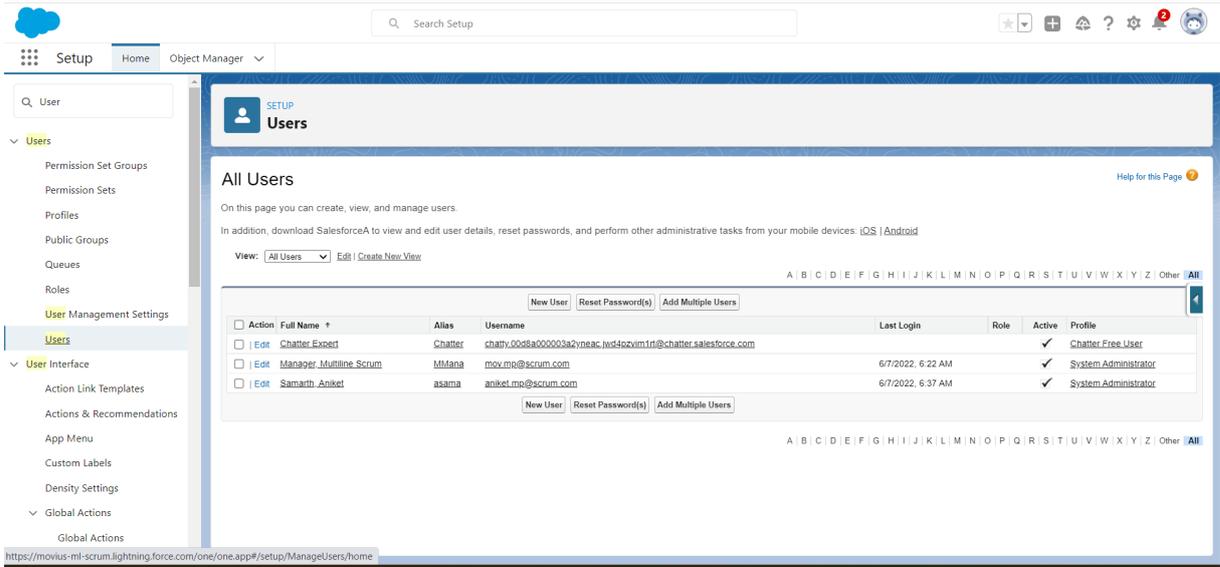
Step 1 - Create user in Salesforce

1. Go to **Setup**.



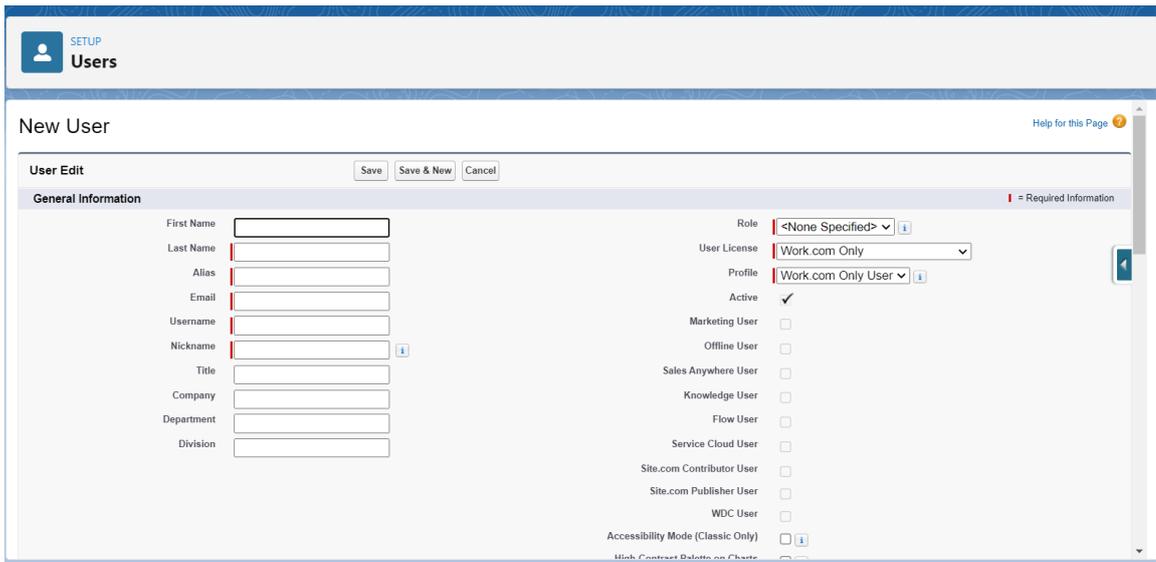
The screenshot shows the Salesforce Lightning interface. The top navigation bar includes a search bar and a 'Setup' button. The 'Setup' menu is open, showing options like 'Service Setup', 'Your Account', 'Add products and licenses', 'Developer Console', and 'Edit Page'. The main content area displays a 'Quarterly Performance' chart and 'Today's Events' and 'Today's Tasks' sections.

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



The screenshot shows the 'Users' management page in the MOVIUS Setup interface. The left sidebar contains navigation options like 'Users', 'User Interface', and 'Global Actions'. The main content area is titled 'All Users' and includes a table of existing users. The table has columns for 'Action', 'Full Name', 'Alias', 'Username', 'Last Login', 'Role', 'Active', and 'Profile'. Three users are listed: 'Chatter Expert', 'Manager_Multiline_Scrum', and 'Samarth Aniket'. Above the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A search bar and a 'Search Setup' field are visible at the top of the page.

3. Click the **New User** button.
4. Fill in all required information.
 1. For **User License** select **Salesforce**
 2. For **Profile** select **System administrator**

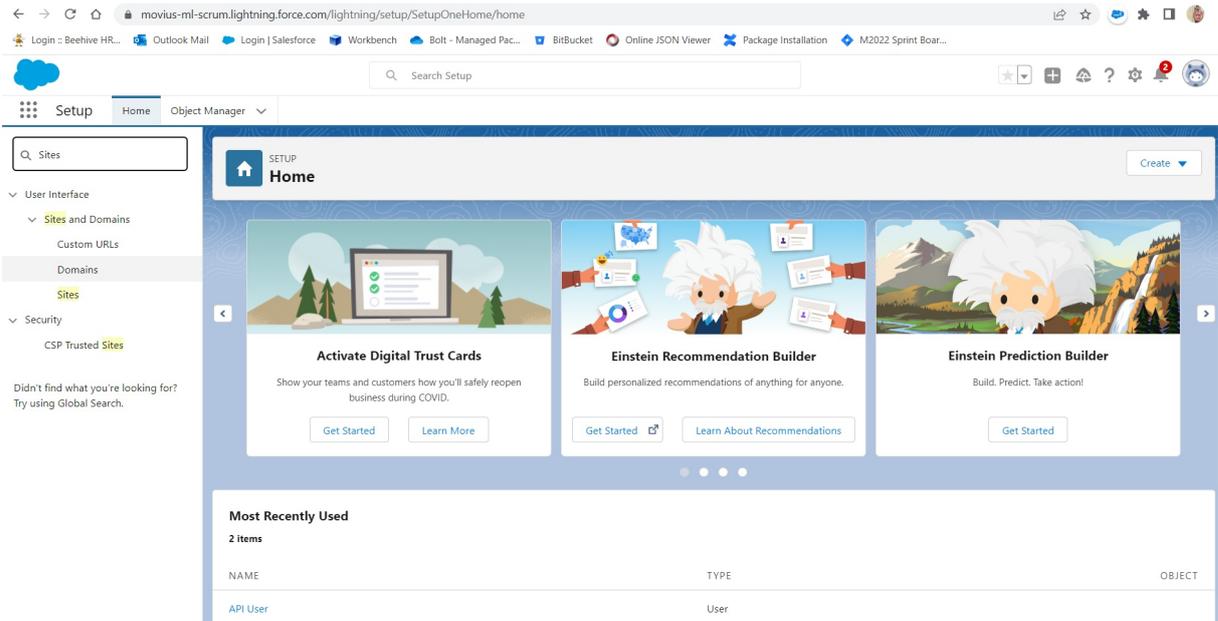


The screenshot shows the 'New User' form in the MOVIUS Setup interface. The form is titled 'New User' and has a 'User Edit' section with 'General Information' and 'Role' fields. The 'Role' field is set to '<None Specified>' and the 'User License' field is set to 'Work.com Only'. The 'Profile' field is set to 'Work.com Only User'. The 'Active' checkbox is checked. The 'Marketing User', 'Offline User', 'Sales Anywhere User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', and 'Accessibility Mode (Classic Only)' checkboxes are unchecked. The 'General Information' section includes fields for 'First Name', 'Last Name', 'Alias', 'Email', 'Username', 'Nickname', 'Title', 'Company', 'Department', and 'Division'. The 'Role' field is set to '<None Specified>' and the 'User License' field is set to 'Work.com Only'. The 'Profile' field is set to 'Work.com Only User'. The 'Active' checkbox is checked. The 'Marketing User', 'Offline User', 'Sales Anywhere User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', and 'Accessibility Mode (Classic Only)' checkboxes are unchecked.

5. Click **Save**.

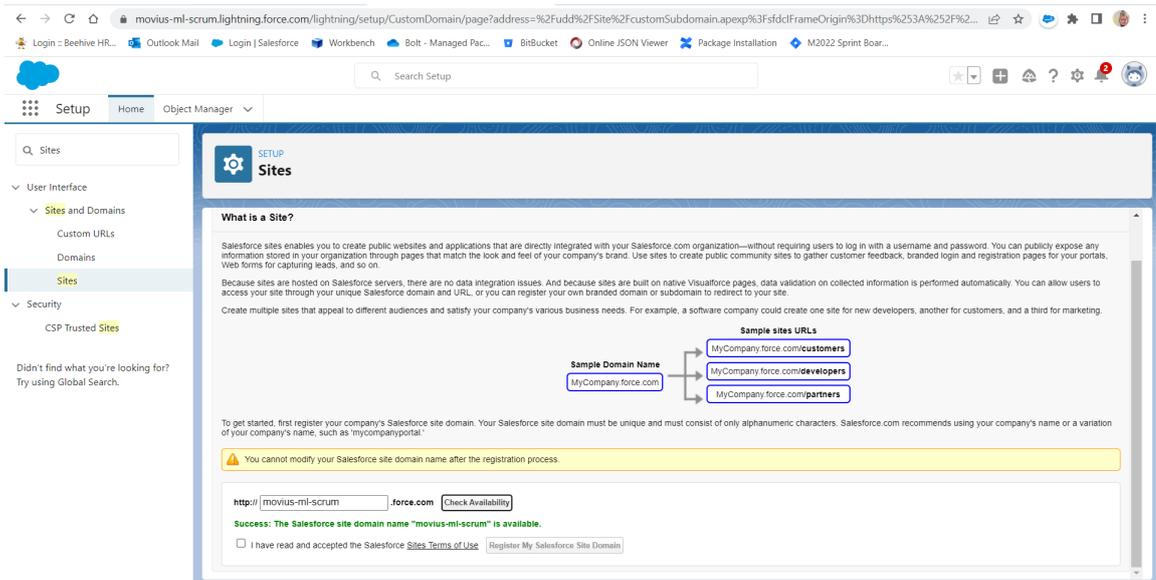
Step 2 - Set up public site

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.

Sites (movius-mi-scrum.force.com)		New			
Site Label +	Site URL	Site Description	Active	Site Type	Last Modified By
No records to display.					

4. Complete the information:

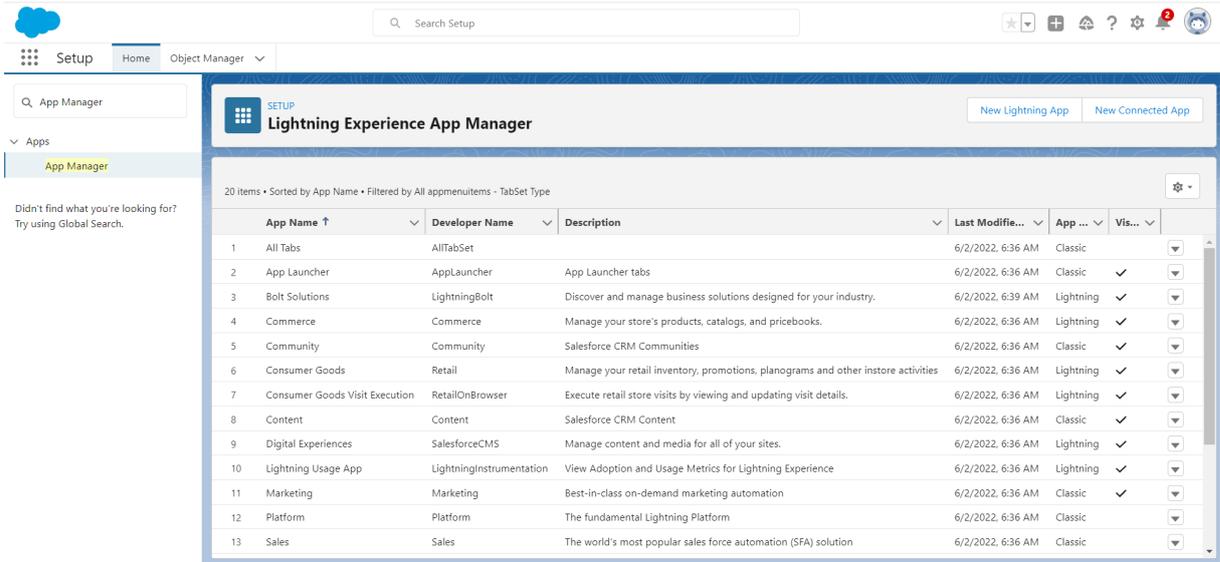
1. Site Label: **Movius**
2. Active checkbox: **checked**
3. Active Site Home Page: **AnswersHome**.
4. Redirect to custom domain: **unchecked**.
5. Click **Save**.

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.

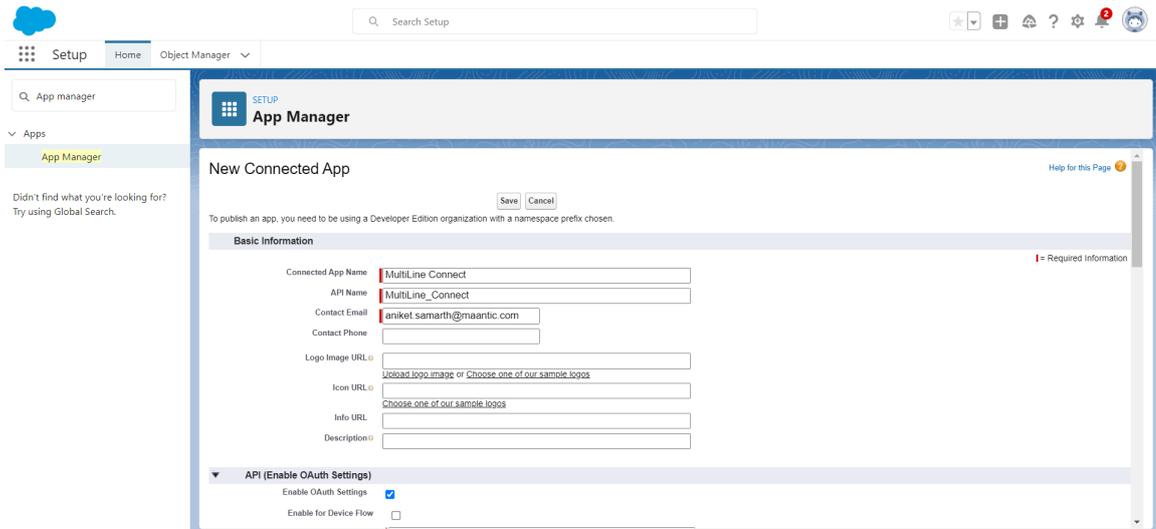


The screenshot shows the Salesforce Setup page with the "App Manager" section selected. The "Lightning Experience App Manager" page is displayed, showing a list of 20 items sorted by App Name. The table below represents the data shown in the screenshot:

App Name ↑	Developer Name	Description	Last Modifie...	App ...	Vis...
1 All Tabs	AllTabSet		6/2/2022, 6:36 AM	Classic	
2 App Launcher	AppLauncher	App Launcher tabs	6/2/2022, 6:36 AM	Classic	✓
3 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	6/2/2022, 6:39 AM	Lightning	✓
4 Commerce	Commerce	Manage your store's products, catalogs, and pricebooks.	6/2/2022, 6:36 AM	Lightning	✓
5 Community	Community	Salesforce CRM Communities	6/2/2022, 6:36 AM	Classic	✓
6 Consumer Goods	Retail	Manage your retail inventory, promotions, planograms and other instore activities	6/2/2022, 6:36 AM	Lightning	✓
7 Consumer Goods Visit Execution	RetailOnBrowser	Execute retail store visits by viewing and updating visit details.	6/2/2022, 6:36 AM	Lightning	✓
8 Content	Content	Salesforce CRM Content	6/2/2022, 6:36 AM	Classic	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	6/2/2022, 6:36 AM	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	6/2/2022, 6:36 AM	Lightning	✓
11 Marketing	Marketing	Best-in-class on-demand marketing automation	6/2/2022, 6:36 AM	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	6/2/2022, 6:36 AM	Classic	
13 Sales	Sales	The world's most popular sales force automation (SFA) solution	6/2/2022, 6:36 AM	Classic	

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



The screenshot shows the "New Connected App" configuration form in Salesforce Setup. The form is titled "New Connected App" and includes a "Save" button and a "Cancel" button. Below the title, there is a note: "To publish an app, you need to be using a Developer Edition organization with a namespace prefix chosen." The form is divided into two sections: "Basic Information" and "API (Enable OAuth Settings)".

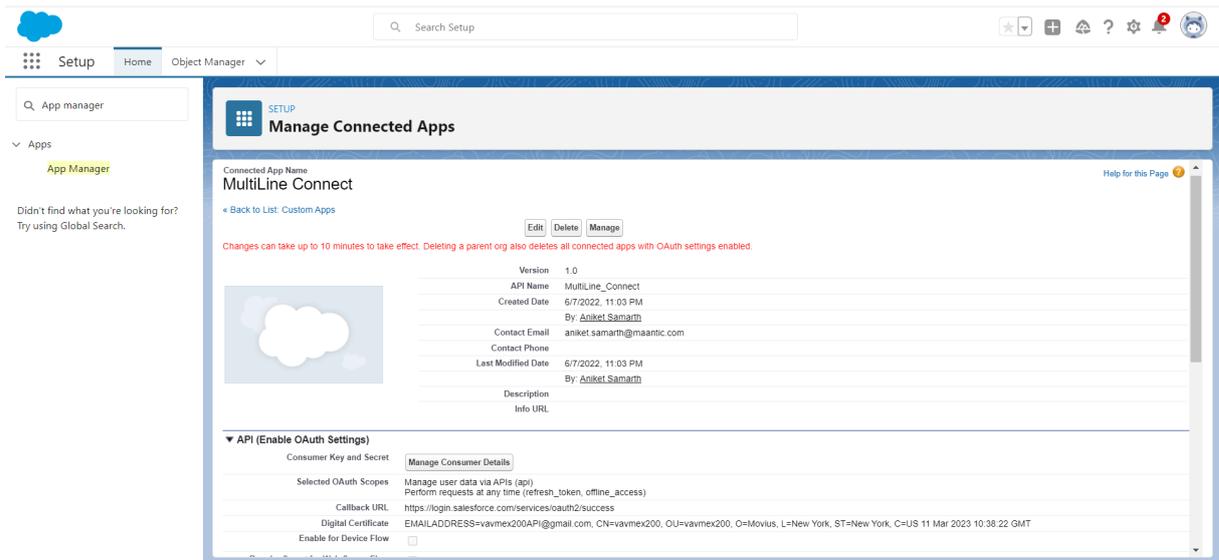
Basic Information

- Connected App Name: MultiLine Connect
- API Name: MultiLine_Connect
- Contact Email: aniket.samarth@maantic.com
- Contact Phone: [Empty]
- Logo Image URL: [Empty]
- Icon URL: [Empty]
- Info URL: [Empty]
- Description: [Empty]

API (Enable OAuth Settings)

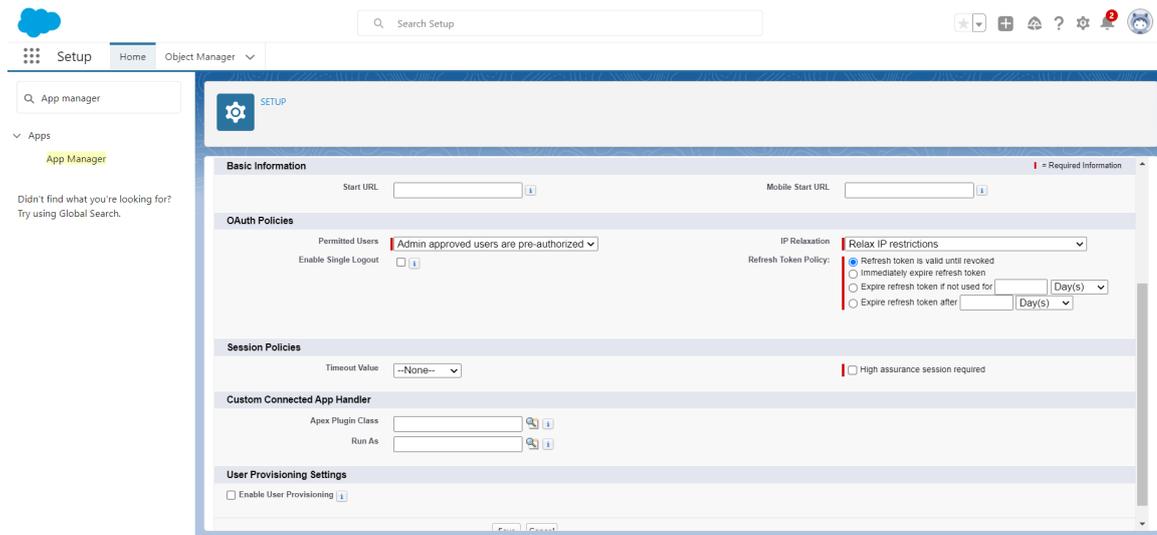
- Enable OAuth Settings:
- Enable for Device Flow:

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.

salesforce appexchange

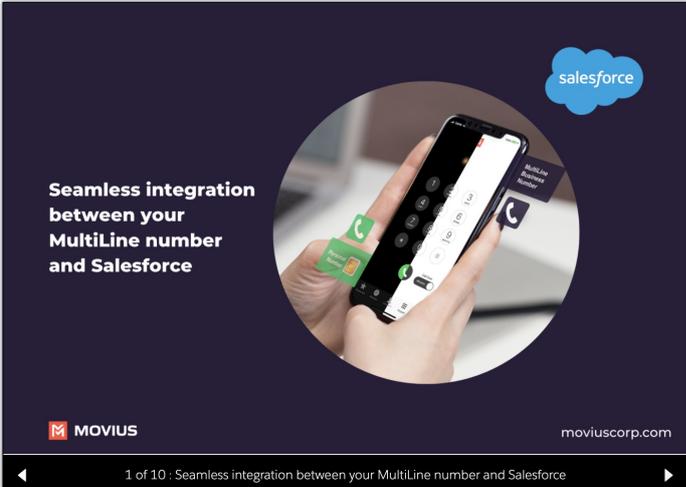
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< SEARCH RESULTS | ALL APPS > COLLABORATION > CHAT & WEB CONFERENCING

MultiLine for Salesforce By Movius Corporation



Seamless integration between your MultiLine number and Salesforce

MOVIUS moviuscorp.com

[Get It Now](#)

\$30 USD per user per month

[Watch Demo](#)

RATING: ★★★★★ (0)

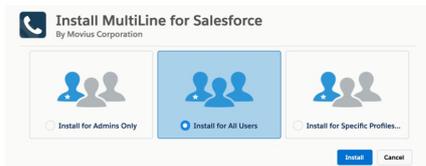
CATEGORIES: [Chat & Web Conferencing](#)

LATEST RELEASE: 5/5/2021

Seamless integration between MultiLine and Salesforce. MultiLine for Salesforce creates smarter workflows and productivity to help teams drive better relationships and client engagement - communicating efficiently and compliantly while maintaining full visibility into all conversation data within the CRM.

1 of 10 : Seamless integration between your MultiLine number and Salesforce

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**.

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Release Updates
- Lightning Experience Transition Assistant
- New Salesforce Mobile App QuickStart
- Lightning Usage
- Optimizer
- Manage Subscription
- ADMINISTRATION
 - > Users
 - > Data
 - > Email
- PLATFORM TOOLS
 - > Apps
 - App Manager

SETUP Installed Packages

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	MultiLine	Movius	1.30 (Beta 7)	MultiLine	6/7/2022, 11:31 PM		1	5	8	Passed

Uninstalled Packages

No uninstalled package data archives

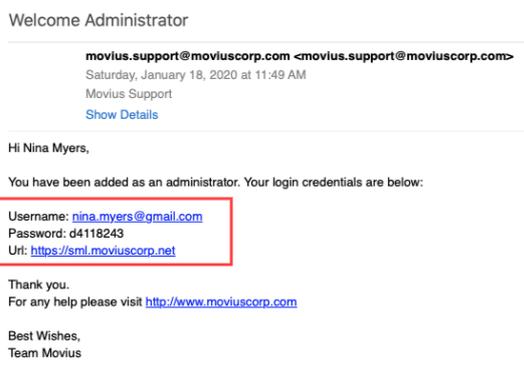
Note: Users won't have access to MultiLine for Salesforce until you add them to the Call Center

at a later step

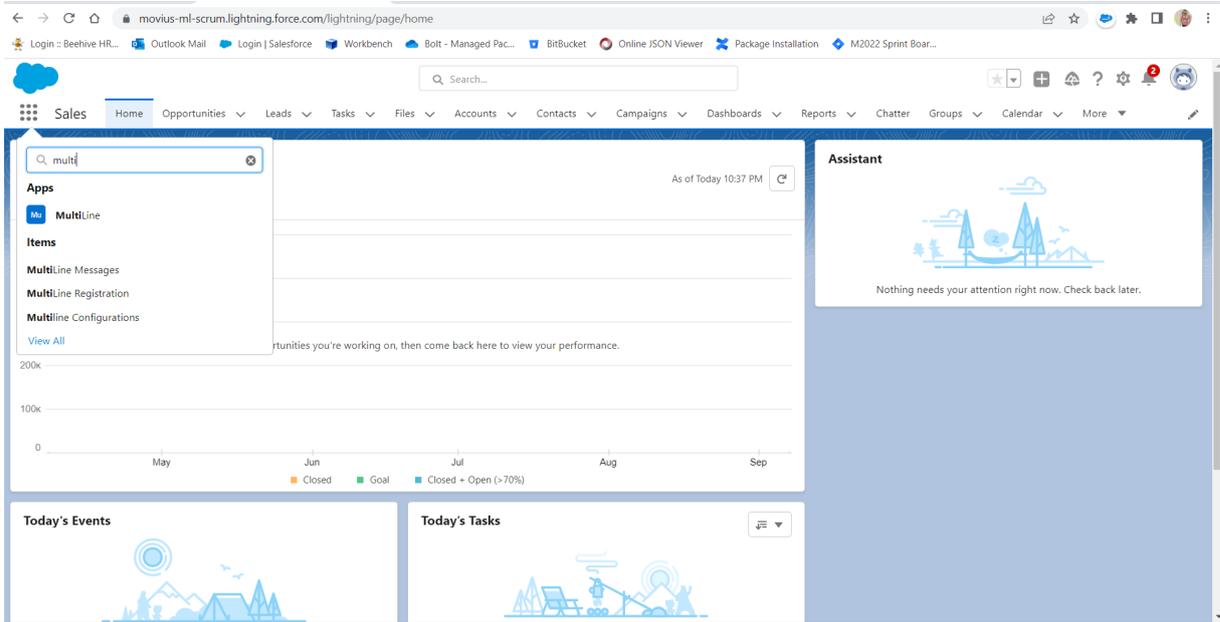
Step 5 - Register MultiLine

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**.



movius-ml-scrum.lightning.force.com/lightning/page/home

Search...

Apps

- MultiLine

Items

- MultiLine Messages
- MultiLine Registration
- MultiLine Configurations

View All

As of Today 10:37 PM

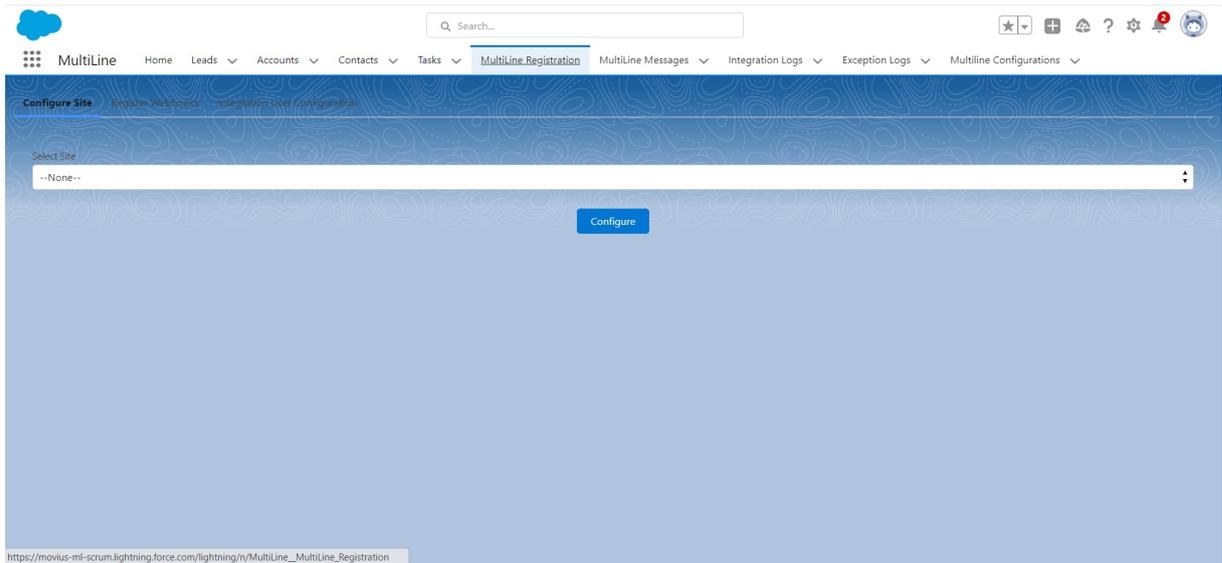
Assistant

Nothing needs your attention right now. Check back later.

Today's Events

Today's Tasks

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](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.

Register Server

Endpoint Name
UatZeta

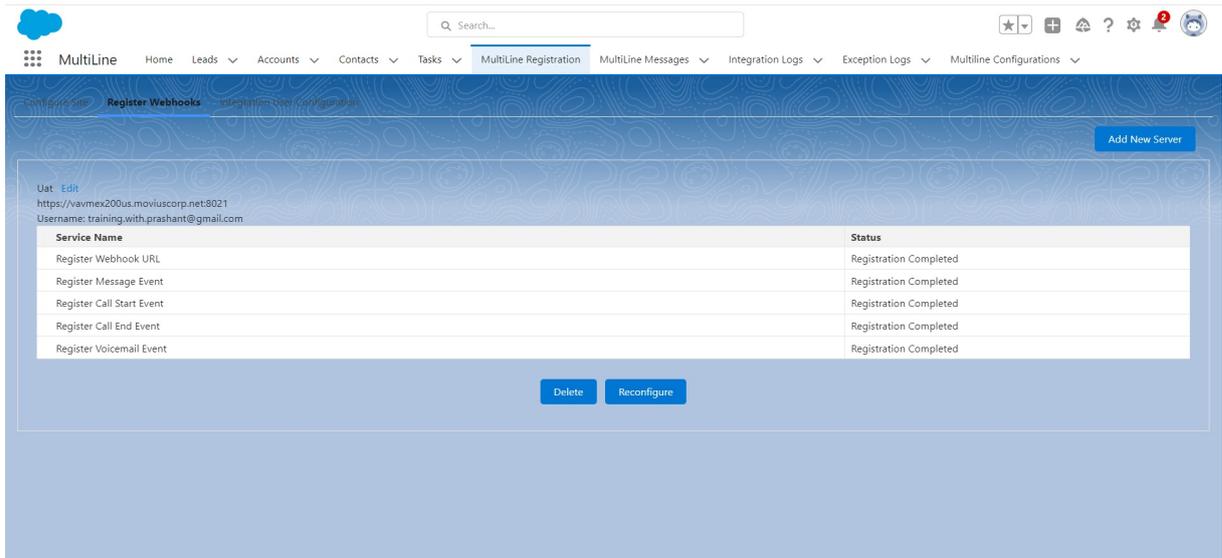
Endpoint URL
https://vavmex200us.moviuscorp.net:8021

Username
training.with.prashant@gmail.com

Password
.....

Cancel Configure

4. Your Webhook will now display.



Step 6 - Configure MultiLine Messages List

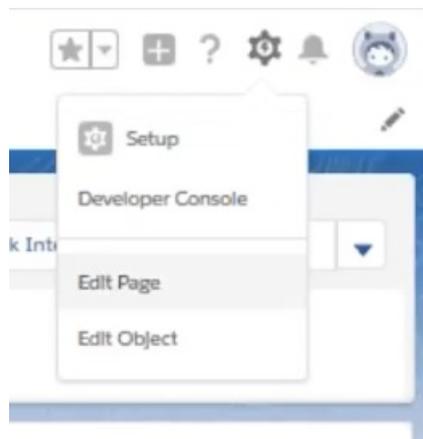
MultiLine Messages View can be added to **Contacts, Leads, and Accounts** Pages.

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.**

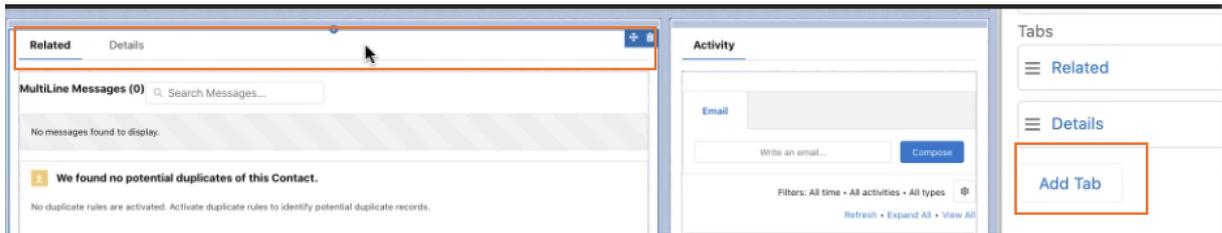


3. Select **Edit Page**.



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.

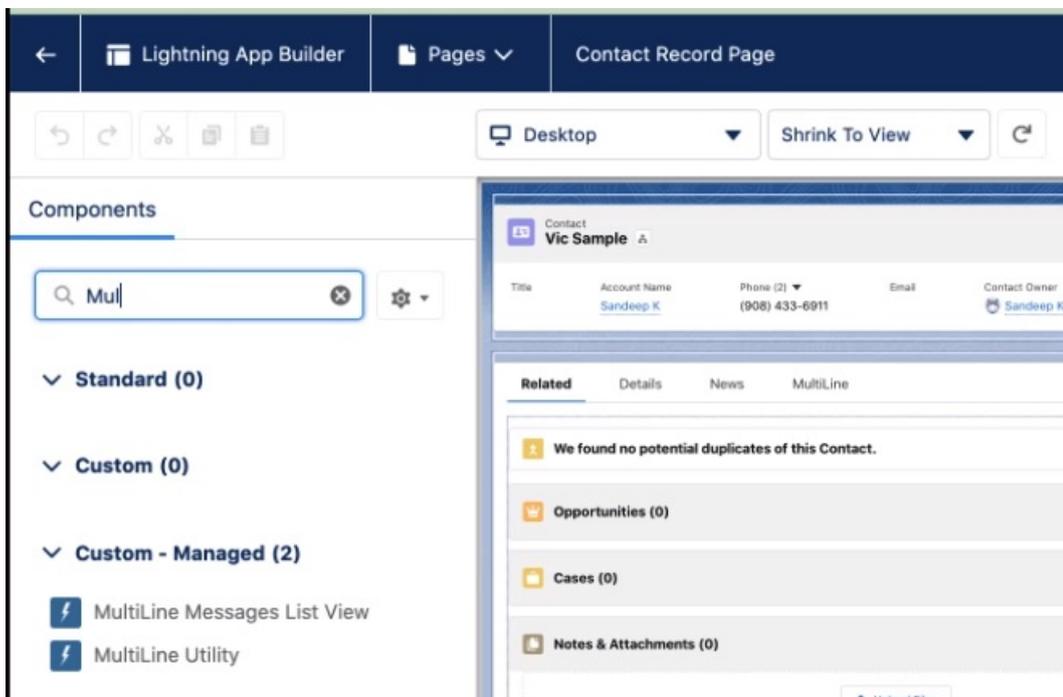
5. Click the **Add Tab** button.



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



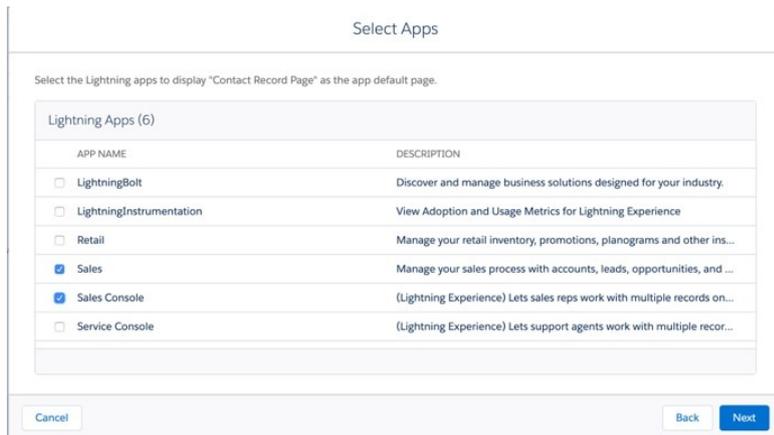
9. Drag it under the **MultiLine** tab.

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**.

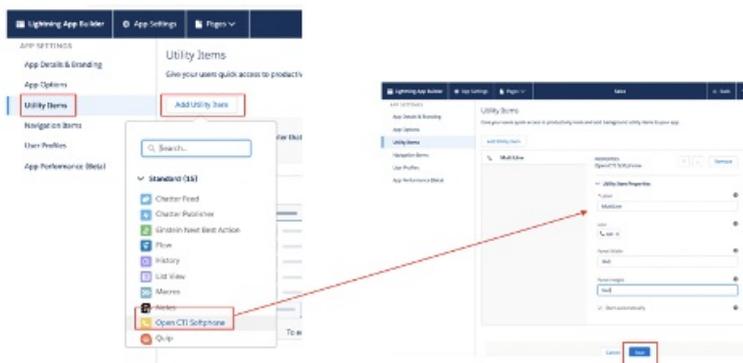


Repeat the steps above for the **Lead** and **Accounts** pages.

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) (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) (<https://moviuscorp.knowledgeowl.com/help/multiline-admin-install-guide>).

Once the MultiLine administrator actions are complete, proceed.

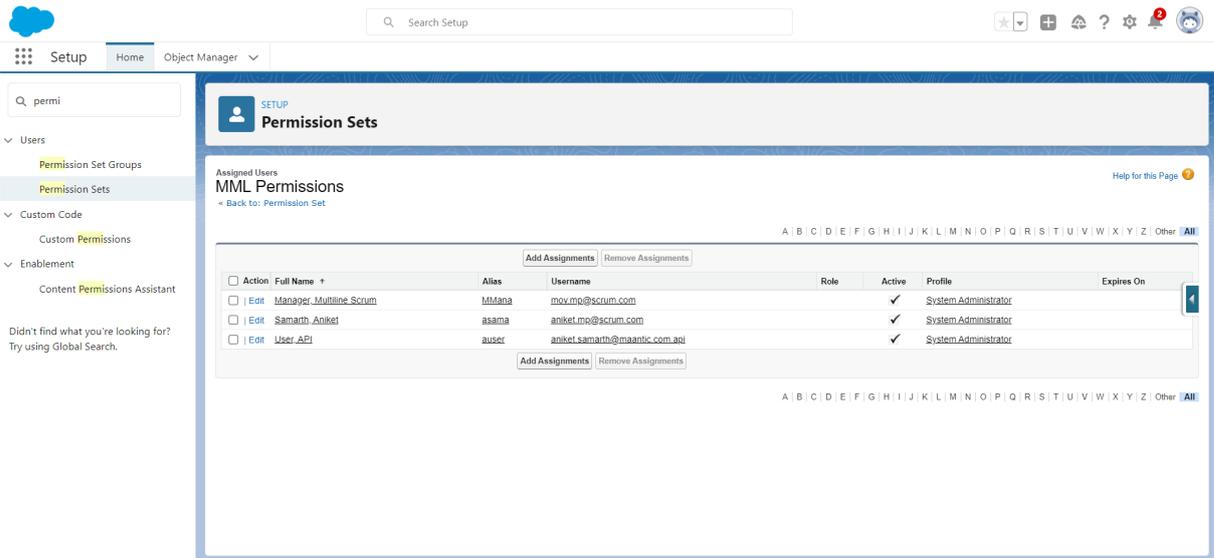
Step 9 - Manage Licenses

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.



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**

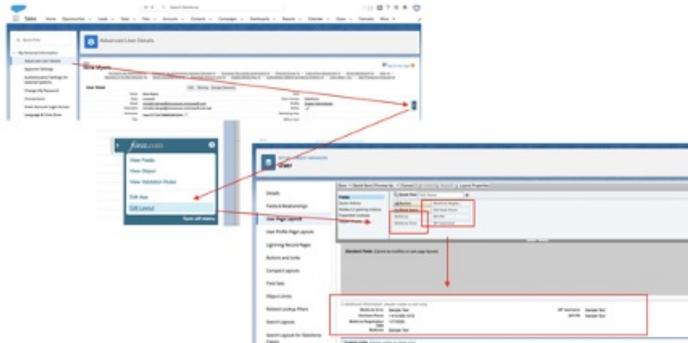
For Bulk User Import, please see [Bulk User Import Configuration for Salesforce](https://moviuscorp.knowledgeowl.com/help/bulk-user-configuration) (<https://moviuscorp.knowledgeowl.com/help/bulk-user-configuration>).

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.



MultiLine Error	SP Username
Old Desk Phone	SP PW
MultiLine Registration Date	
MultiLine	

De-provisioning users

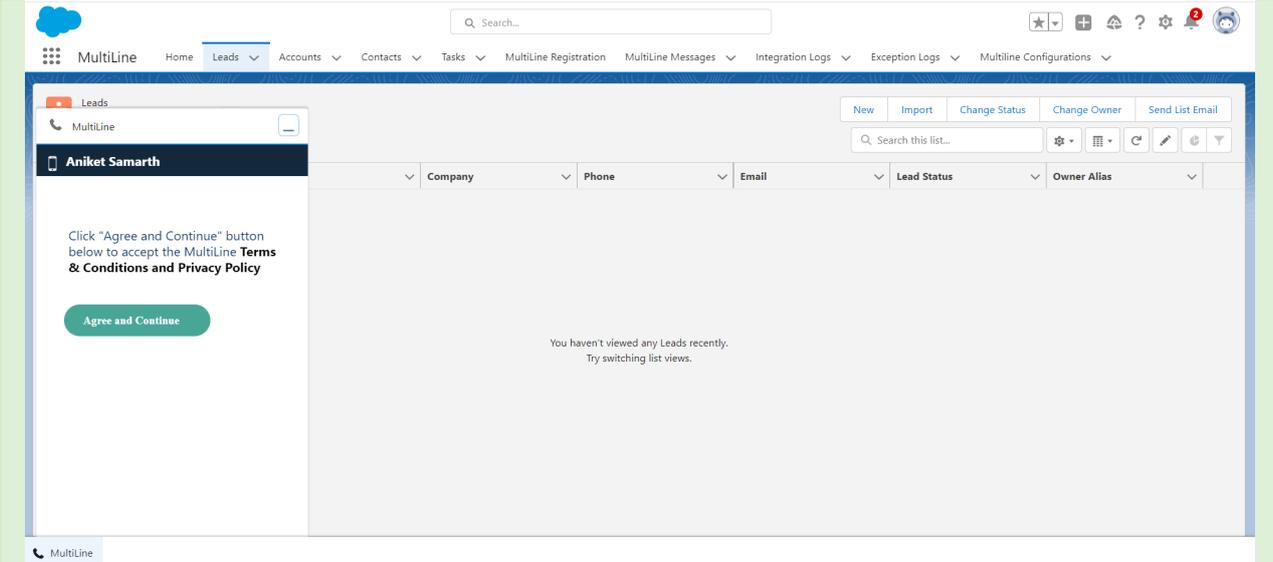
If the user needs to be deprovisioned from using MultiLine for Salesforce,

1. Clear **MultiLine** and **MultiLine Registration Date** as shown in the above steps.
2. Change the user Profile to the one that 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.



The screenshot displays the MultiLine interface within a Salesforce environment. At the top, there is a navigation bar with a search field and various utility icons. Below this is a main menu with options like Home, Leads, Accounts, Contacts, Tasks, MultiLine Registration, MultiLine Messages, Integration Logs, Exception Logs, and MultiLine Configurations. The central area is divided into two panels. The left panel, titled 'Leads', shows a lead card for 'Aniket Samarth' with a mobile phone icon and a message: 'Click "Agree and Continue" button below to accept the MultiLine Terms & Conditions and Privacy Policy'. Below the message is a green 'Agree and Continue' button. The right panel shows a table with columns for Company, Phone, Email, Lead Status, and Owner Alias. The table is currently empty, with a message in the center: 'You haven't viewed any Leads recently. Try switching list views.' Above the table, there are buttons for 'New', 'Import', 'Change Status', 'Change Owner', and 'Send List Email', along with a search field and various list view controls.

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