

# MultiLine for Salesforce Product Document

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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

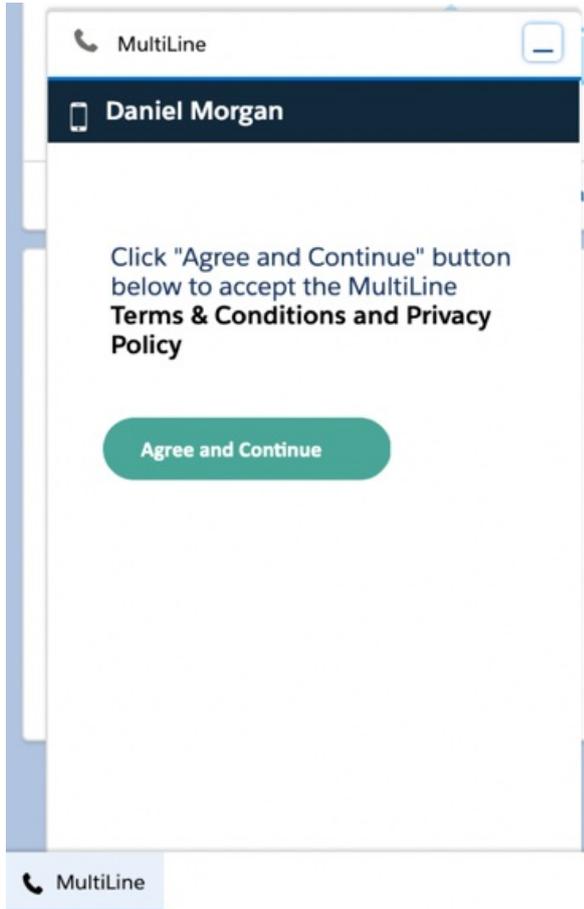
- Inbound/Outbound calling
- Visual Voicemail
- Supports Salesforce Lightning
- MultiLine Utility
- Click to Text
- Click to Call
- Automatic Call Logging
- Alert Notifications
- Notes
- Automatic Reply
- Quick Text Templates

- Reporting

## Step 1: Activate MultiLine for Salesforce

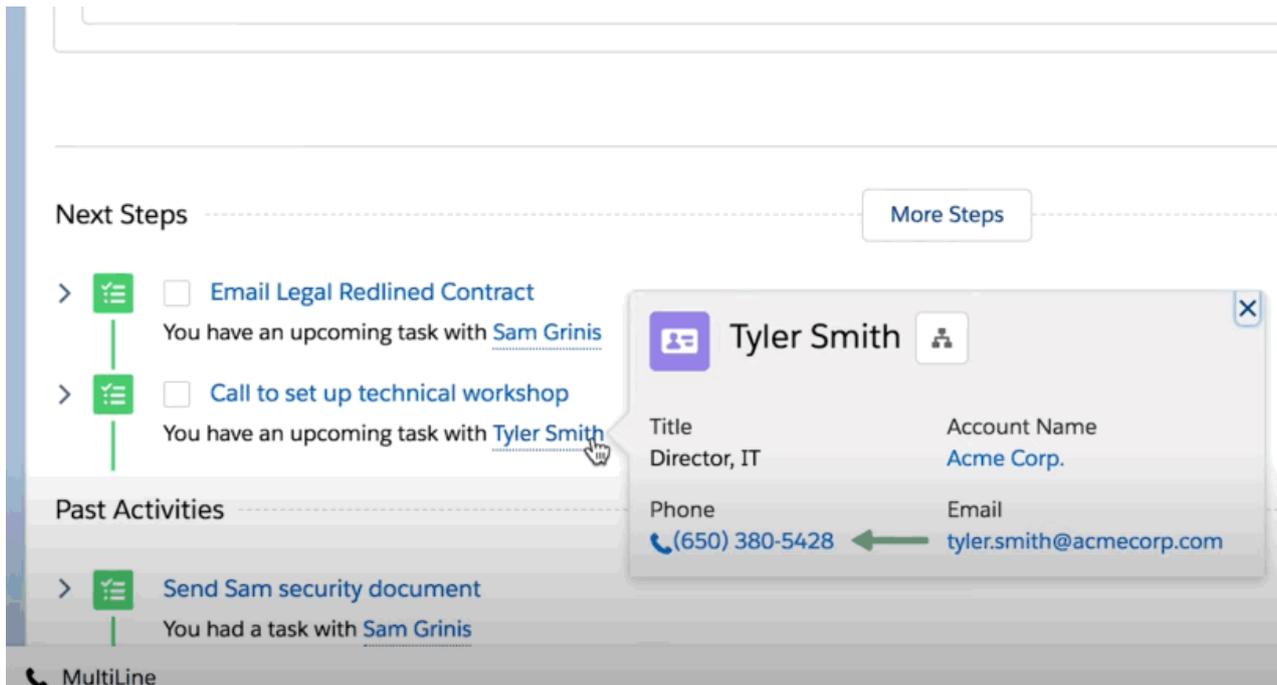
Once your organization sets you up with MultiLine for Salesforce, when you log into Salesforce, you should see the MultiLine utility in the bottom left of your screen.

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.

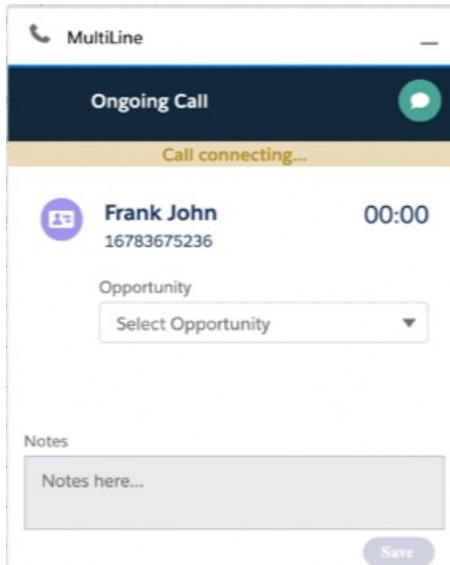
### Incoming Calls:

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.

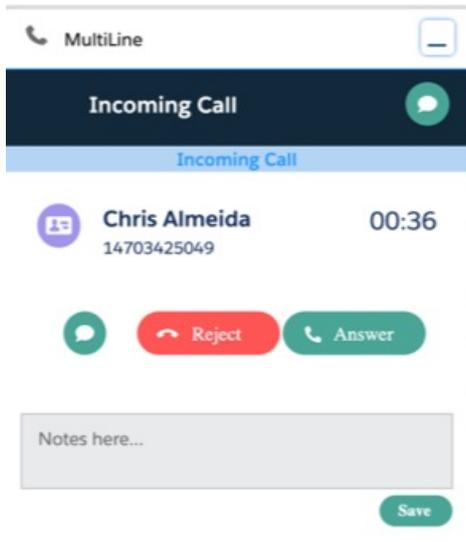
Click on the message icon to disconnect the call and respond with a message.

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.

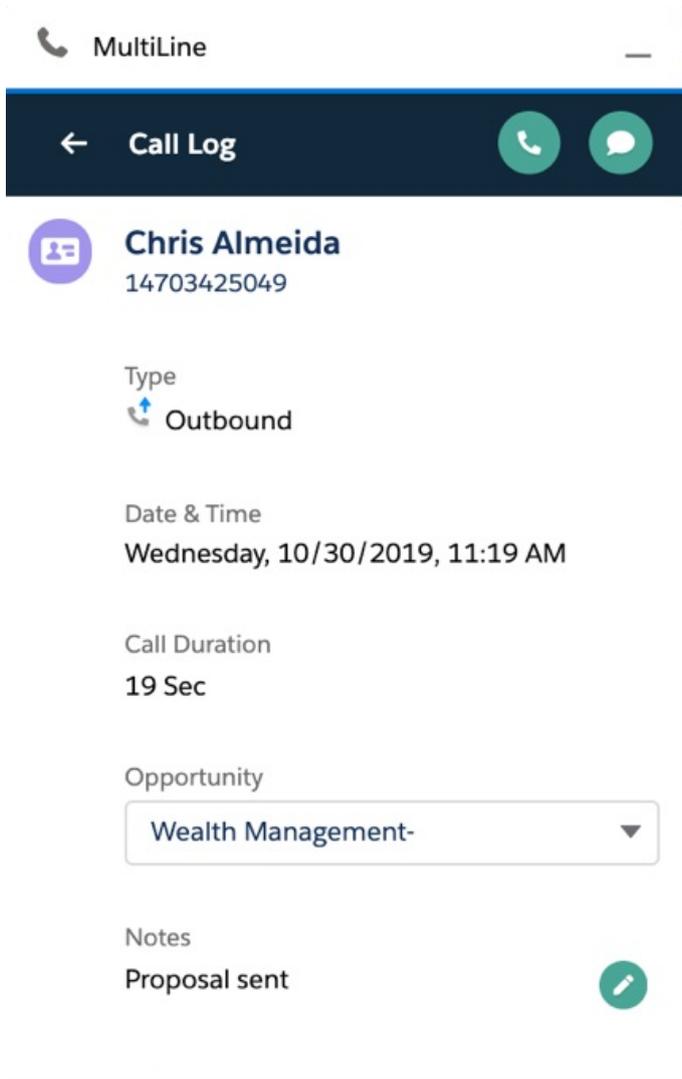
Each call record shows:

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

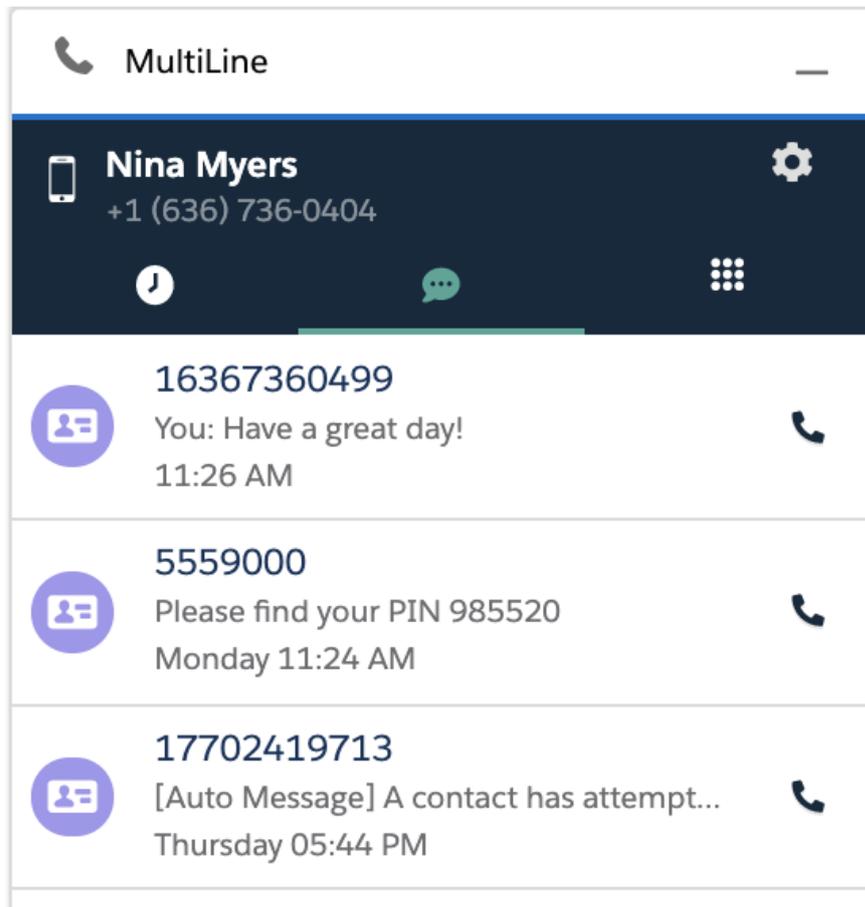
- Clicking any phone number field in Salesforce will launch MultiLine for Salesforce
- The phone number will auto-populate in the keypad
- Clicking on the message icon opens the message conversation thread with that number

## 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

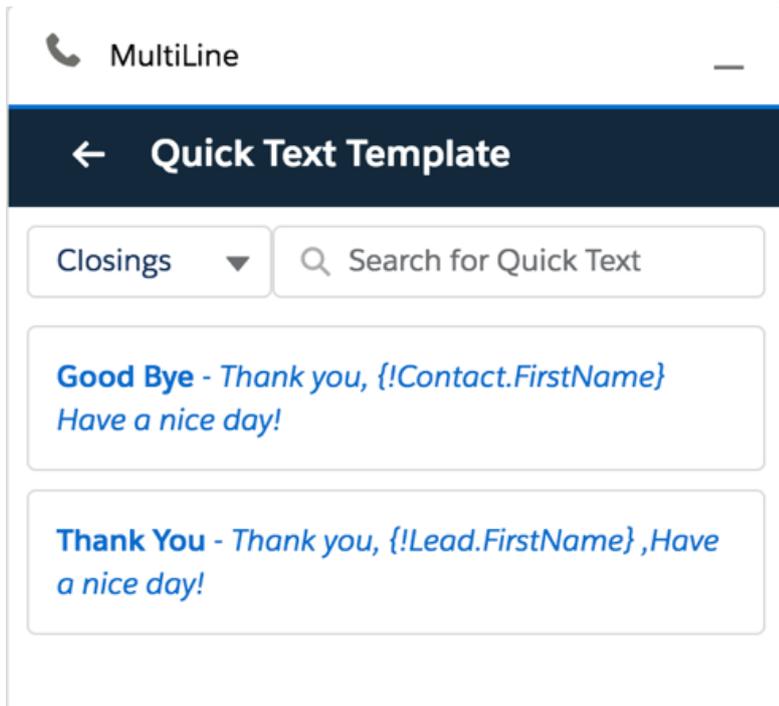
Portal—works in a community or a customer portal

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.

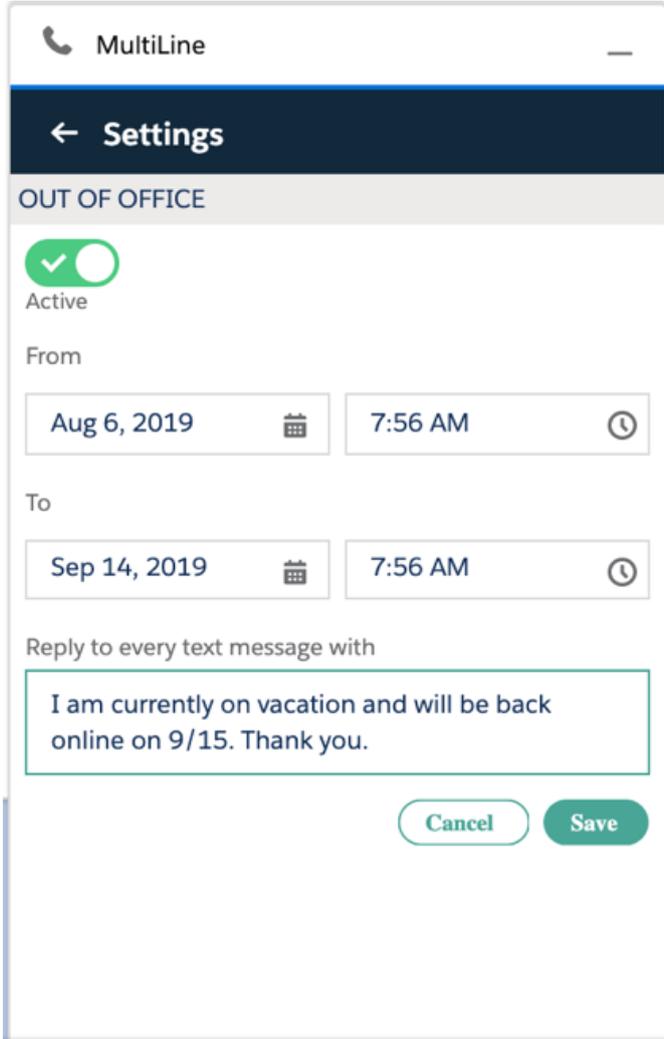
The Salesforce administrator can further build workflows or visual flows to assign these contacts to separate groups/teams, auto-delete, or take advanced actions such as alert users/groups based on keywords in the text message.

## 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



The screenshot shows the 'MultiLine' app interface. At the top, there's a 'Settings' header with a back arrow. Below it is the 'OUT OF OFFICE' section. A green toggle switch is turned on, labeled 'Active'. Underneath, there are two rows for date and time selection. The 'From' row shows 'Aug 6, 2019' and '7:56 AM'. The 'To' row shows 'Sep 14, 2019' and '7:56 AM'. Below these is a text input field with the message: 'I am currently on vacation and will be back online on 9/15. Thank you.' At the bottom, there are 'Cancel' and 'Save' buttons.

**Do Not Disturb** and **Call Forwarding** settings on the MultiLine application are applicable for incoming calls in the MultiLine Connector as well.

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## 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.

