

End-User Guide: Get started with MultiLine for Salesforce

Last Modified on 07/28/2022 8:14 am EDT

Read on for instructions on getting started with MultiLine for Salesforce as an end-user.

About MultiLine for Salesforce

MultiLine for Salesforce 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.)

Features

The MultiLine Utility offers a seamless integration between Salesforce and MultiLine app. See below tables for list of features and compatibilities.

MultiLine for Salesforce Utility

MultiLine for Salesforce Features	Description
Seamless Integration between Salesforce and MultiLine app	<ul style="list-style-type: none">• All the messages exchanged between MultiLine application and Salesforce are synched.• All the calls made from MultiLine app are synched on Salesforce.• Calls made from Salesforce are NOT synched on MultiLine app.• Users from multiple Movius servers can be configured on the same Salesforce instance.
Supports Salesforce Lightning	Integrated with Salesforce Lightning component for enhanced user experience. Available on Salesforce Professional, Enterprise and Unlimited Editions.

MultiLine for Salesforce Features	Description
Supports Salesforce Cloud	Sales Cloud, Service Cloud, Financial Service Cloud etc.
MultiLine Utility	<ul style="list-style-type: none"> • Lists history of recent calls • Lists history of recent messages • Displays the number pad • Shows the alert notification for the incoming calls and incoming messages
Click to Text	<p>With MultiLine subscription plan, users can send / receive text messages from the MultiLine for Salesforce application. The roll up summary (history) of the messages exchanged with a given Account, Contact or Lead will be available in the Related List View for MultiLine. The messages exchanged on a given day will be grouped together in a record and there will be individual records for each day a communication was made through messages.</p>
Click to Call	<p>With MultiLine subscription plan, users can make / receive call within Salesforce using the MultiLine for Salesforce application. The details of these calls are available as Tasks and clicking on Tasks will take the user to the Call Details page.</p>
Automatic Call Logging	<ul style="list-style-type: none"> • Incoming / outgoing calls are automatically captured and logged as a task under Activity of the Contact/Lead/Account. User can click on the task details to see the details related to the call. • An opportunity will automatically be associated with the incoming & outgoing calls to the Contact/ Lead/ Account if the call is made while the user is on the Opportunity Details Page on Salesforce.
Alert Notification	<ul style="list-style-type: none"> • For incoming messages, the MultiLine for Salesforce beeps once. Recent message log shows the notification icon for the incoming message. • For incoming calls, the MultiLine for Salesforce rings and provides an interface to answer or reject the call.
Notes	<p>Notes can be added to the ongoing calls and they can be viewed or updated anytime later. Calls with notes have notes indicator in the call log.</p>

MultiLine for Salesforce Features	Description
Automatic Reply	Out of office setting allows the user to configure an automated message that is sent as a reply to all text messages received during the out of office time period. This can be set from the settings icon available in the top right corner of the MultiLine for Salesforce app.
Quick text templates	Quick text templates defined using Salesforce out-of-the box functionality can be leveraged in while messaging. To access the templates, user needs to click on the template icon available on the messaging screen.
Reporting	Standard Salesforce reporting tool can be used to generate the MultiLine for Salesforce related reports on calls and messages.

MultiLine App

MultiLine Features Supported	Description
Call Handling functionality	Simultaneous and Sequential call handling can be configured from the MultiLine App.
Blocking functionality	Unwanted numbers can be blocked from the MultiLine app.
International Calling	International calls can be made with MultiLine subscription plan.
SMS Opt-in Compliant	With the MultiLine subscription, SMS opt-in compliance can be enforced. Contact/lead need to provide their consent exchanging messages with the Salesforce users.
SMS Redaction Compliant	With the MultiLine subscription, SMS redaction compliance can be enforced. Any sensitive information contained in the text message is redacted before sending it to the recipient.

MultiLine Features Supported	Description
SMS and Call Recording	With MultiLine Subscription, all the text and calls made from Salesforce can be recorded. The recordings are available in the MultiLine Admin Portal and / or through the platform's integration with customer's archival system.
E911 Compliant	Enforces E911 compliance by disabling outgoing calling functionality until emergency address information is provided.

Limitations

Features	Description
Supported Browsers	Currently only Chrome browser is supported. MultiLine utility may not function correctly if accessed from any other browsers.
Group messages capability	Cannot send / receive Group messages. All the incoming group messages will appear as an individual message. If the group message is sent to, for example, 2 contacts from MultiLine app on the device, in MultiLine for Salesforce there will be 2 records; one for each contact. Each contact will show the outgoing message sent by the Salesforce user to the Contacts.
Picture messages capability	Cannot send / receive Picture messages. User will receive automated message "Unsupported multimedia" for all the incoming picture message.
Visual Voicemail	<p>User will get the notification of the Voicemail delivery inside MultiLine for Salesforce recent messages screen. To listen to the voicemail</p> <ol style="list-style-type: none"> 1. User can dial their multiline number from the keypad in MultiLine for Salesforce. 2. The voicemail can be heard from the MutliLine app on their device. 3. Call MultiLine Number from any other device. Let the call go to the voicemail and then press * and password to hear the Voicemail.

Activating MultiLine for Salesforce

Read on for instructions on activating with MultiLine for Salesforce as an end-user.

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

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.

Calling

Read on to learn about calling in MultiLine for Salesforce.

Overview

You can make calls to your business leads, contacts and accounts and also tag an opportunity to the communication. You can make calls in MultiLine for Salesforce by using the dialer or by clicking numbers that you see within 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.

Before you start

- MultiLine for Salesforce supports two calling modes ([Learn More \(https://moviuscorp.knowledgeowl.com/help/softphone-calling-modes\)](https://moviuscorp.knowledgeowl.com/help/softphone-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.

Call Using the Dialer

Clicking the MultiLine Utility opens the dialer. Enter the number by typing or using the keypad and then click the call icon to make a call.

Call using Click-to-call

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.

Calls

All ongoing calls go through three different stages:

- Call connecting: When the call rings
 - You can add a note, end the call, or send SMS
- Call in progress: When the call is answered
 - You can add a note, mute, dial using the keyboard, send SMS, or end the call
- Call ended: When the call has ended
 - You can add a note

Call Logging

You can see the call log for a given business entity (Lead/ Contact/ Account) listed under Activities.

Notes

While call is connecting, in progress, or ended, you can add a note by clicking in the Note field and then clicking Save.

- At any time during the call the Salesforce user can enter notes
- These notes will be saved in the call log as 'Description'.
- Notes can also be viewed and edited from the 'Tasks' section created for each call under the 'Activity' subsection.

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)
- 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 .

Unsaved numbers

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.

Messaging

Read on to learn about messaging and quick texts from MultiLine for Salesforce.

Overview

MultiLine for Salesforce offers robust messaging features, including:

- Messaging using the dialer or by clicking numbers you see in Salesforce (Click-to-Text)
- Easily sending QuickTexts
- Roll Up Summary for messages by Accounts, Contacts, and Leads

Messages you send and receive in MultiLine for Salesforce will also sync with the MultiLine app on your mobile phone.

Using Click-to-Text

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

Using Quick Texts

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.

Refer to *Salesforce Help* (https://help.salesforce.com/articleView?id=quick_text_setting_up.htm&type=5) for more information on creating Quick Text messages and sharing them.

Send 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.

Roll Up Summary

You can see the text log for a given business entity (Lead/ Contact/ Account) listed as a roll up summary in the MultiLine Message section.

1. Access the Lead, Contact, or Account and click the text log from the MultiLine Messages panel.
2. The Daily Roll Up Record will display.

Tag with an Opportunity

Read on to learn about how to tag your calls and texts with an Opportunity.

Overview

You can tag your calls and texts with Opportunities using MultiLine for Salesforce. Salesforce users use tags to group records from various objects by a common theme. Adding tags in search criteria makes finding relevant information easier.

Before you start

- You'll need permission to add and edit tags.

How to add an Opportunity tag to a call

1. Click the **Tag Opportunity** icon.
2. Select the **Opportunity**. *Note: begin typing Opportunity Name in the "Search Opportunity" window to narrow the list.*
3. Click OK at the prompt and you'll see the tag reflected on your call log.

How to add an Opportunity tag to a text

1. Click the **Tag Opportunity** icon.
2. Select the **Opportunity**. *Note: begin typing Opportunity Name in the "Search Opportunity" window to narrow the list.*
3. Click **OK** at the prompt and you'll see the Opportunity reflected on your text log.

Settings

Read on to learn about setting Do not Disturb, Out of Office, and Call Forwarding in MultiLine for Salesforce.

Overview

You can set up an out of office auto-reply in MultiLine for Salesforce for messages received to your MultiLine Number. Your [Call Forwarding and Do Not Disturb settings](https://moviuscorp.knowledgeowl.com/help/call-handling-sequential-and-simultaneous-dial-do-not-disturb-call-forwarding) (<https://moviuscorp.knowledgeowl.com/help/call-handling-sequential-and-simultaneous-dial-do-not-disturb-call-forwarding>) in MultiLine apply to MultiLine for Salesforce.

Out of Office

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

Do Not Disturb and **Call Forwarding** settings on the MultiLine application are applicable for incoming calls in the MultiLine Connector as well. See [Call Handling: Sequential and Simultaneous Dial, Do Not Disturb, Call Forwarding](https://moviuscorp.knowledgeowl.com/help/call-handling-sequential-and-simultaneous-dial-do-not-disturb-call-forwarding) (<https://moviuscorp.knowledgeowl.com/help/call-handling-sequential-and-simultaneous-dial-do-not-disturb-call-forwarding>).

- 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.
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