

MultiLine for Salesforce Installation Guide for MultiLine Admins

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Read this guide to install MultiLine for Salesforce in the Management Portal. For installing the connector in Salesforce see [MultiLine for Salesforce Installation Guide for Salesforce Admins](https://help.moviuscorp.com/help/multiline-for-salesforce-installation-guide-for-salesforce-admins) (<https://help.moviuscorp.com/help/multiline-for-salesforce-installation-guide-for-salesforce-admins>).

Overview

A MultiLine administrator in the Management Portal needs to complete these steps to set up MultiLine for Salesforce. To complete integration, some steps will require actions from the Salesforce Administrator.

Before you start

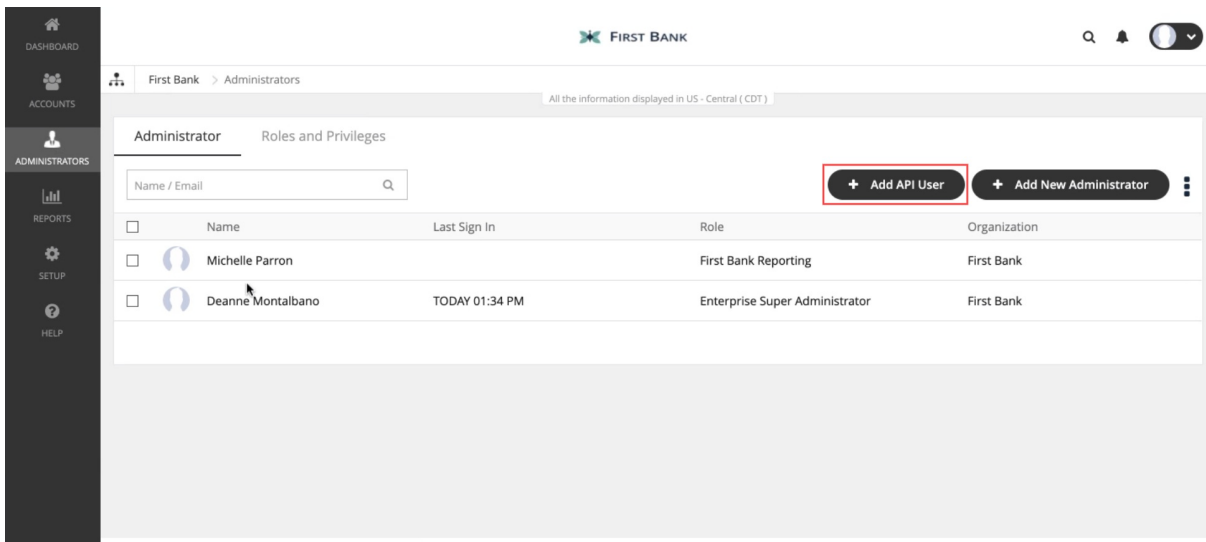
- If possible, perform these steps before adding MultiLine for Salesforce users to the organization.
- An admin must have "Administrators" Role in the organization to do these instructions. See [What Admin Roles are in the Management Portal](https://help.moviuscorp.com/help/what-admin-roles-mmp) (<https://help.moviuscorp.com/help/what-admin-roles-mmp>).

MultiLine for Salesforce Installation

Step 1 - Add the Salesforce Administrator as an API user

Use this section to summarize what users will complete in the following steps.

1. Go to **Administrators** and click **Add API User**



The screenshot shows the 'Administrators' page in the MultiLine Management Portal. The page title is 'First Bank > Administrators'. Below the title, there is a search bar and two buttons: '+ Add API User' (highlighted with a red box) and '+ Add New Administrator'. Below the buttons is a table with columns: Name, Last Sign In, Role, and Organization. The table contains two rows of administrator data.

<input type="checkbox"/>	Name	Last Sign In	Role	Organization
<input type="checkbox"/>	Michelle Parron		First Bank Reporting	First Bank
<input type="checkbox"/>	Deanne Montalbano	TODAY 01:34 PM	Enterprise Super Administrator	First Bank

2. Enter the required details for the **Salesforce Administrator**
Note: Email address must not be associated with an active MultiLine administrator account
3. From the **External Applications** dropdown select **Salesforce**
4. Click **Save**
5. An email will be sent to your Salesforce Administrator's email entered above containing a

temporary password

Salesforce Administrator Action Needed

Before proceeding, the Salesforce Administrator must complete the following steps:

- Getting Started in Salesforce
- Install MultiLine for Salesforce
- Register MultiLine
- Configure MultiLine for Salesforce

Once the Salesforce Administrator actions are complete, you can proceed.

Step 2 - Create User Permissions for MultiLine for Salesforce

1. Go to **Setup, then User Permissions, and select Add New.**
2. Edit the feature set according to the permissions the users of MultiLine for Salesforce should have.
3. **Enter the name as the Permissions set as "MultiLine for Salesforce" and click Save.**

Step 3 - Manage Webhook Events

1. **Go to Setup and click Webhook Events.**
2. For every Webhook events displayed, click **Edit.**
3. Under **User Permissions** select **MultiLine for Salesforce** and click **Save.**

Step 4 - Manage MultiLine for Salesforce Users

Now you need to apply the user permissions you created to the user accounts.

Select the tab below according to whether the users that are using MultiLine for Salesforce are already MultiLine users, or are new users that need to be invited.

For existing MultiLine users

1. Navigate to the organization where MultiLine for Salesforce users are provisioned
2. Click **Edit** for the user
3. Check that the email address is same as their SFDC account.
4. Click **User Permissions**
5. Select **MultiLine for Salesforce** from the dropdown and click **Save**

For new MultiLine users

1.
Navigate to the organization where your MultiLine for Salesforce users will be.
2. Go to **Accounts** and click **Add Account.**
3. Enter the required details. *Note: their email address needs to match their Salesforce email address and must be a valid email address.*
4. Click **Assign Number**, enter SFDC in the search bar and select a number from the list. *Note: MultiLine for Salesforce numbers are tagged in the system as SFDC*
5. Under **User Permissions** select **MultiLine for Salesforce.**
6. Click **Invite.**

Salesforce Administrator Action Needed

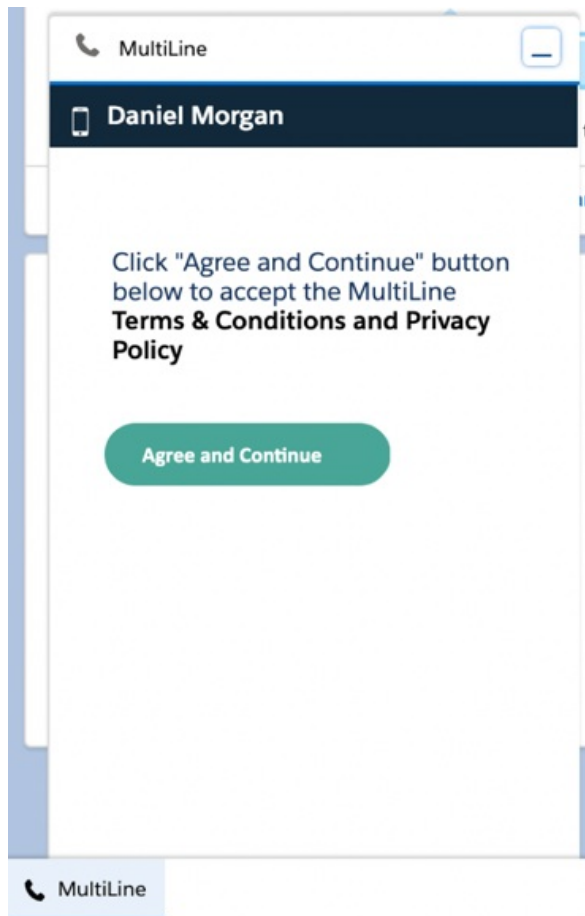
To complete the MultiLine for Salesforce Integration, the Salesforce Administrator needs to complete these steps:

Manage Licenses and Setup Users

Congratulations!

Once the Salesforce Administrator actions are complete, the integration is finished! 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.



1. If their MultiLine number is not assigned to their MultiLine account, then the Salesforce Users will get "MultiLine Registration Failed" error when MultiLine for Salesforce utility is accessed
2. MultiLine for Salesforce is supported on Chrome browser only