

# About MultiLine for Salesforce

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The MultiLine for Salesforce utility allows you to use MultiLine inside of Salesforce CRM.

With this integration, you can:

- Use your MultiLine number to make and receive calls with the Salesforce dialer
- Use your MultiLine number to exchange text messages with the messaging utility
- Save time and prevent human error by automatically tracking all communications with your customer
- Easily add notes to any call, during or after



## Features

You can use this integration seamlessly alongside the MultiLine mobile and desktop apps. See below tables for list of features and compatibilities.

## MultiLine for Salesforce Utility

<b>MultiLine for Salesforce Features</b>	<b>Description</b>
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<b>MultiLine for Salesforce Features</b>	<b>Description</b>
Seamless Integration between Salesforce and MultiLine app	<ul style="list-style-type: none"> <li>• All the messages exchanged between MultiLine application and Salesforce are synched.</li> <li>• All the calls made from MultiLine app are synched on Salesforce.</li> <li>• Calls made from Salesforce are NOT synched on MultiLine app.</li> <li>• Users from multiple Movius servers can be configured on the same Salesforce instance.</li> </ul>
Supports Salesforce Lightning	Integrated with Salesforce Lightning component for enhanced user experience. Available on Salesforce Professional, Enterprise and Unlimited Editions.
Supports Salesforce Cloud	Sales Cloud, Service Cloud, Financial Service Cloud etc.
MultiLine Utility	<ul style="list-style-type: none"> <li>• Lists history of recent calls</li> <li>• Lists history of recent messages</li> <li>• Displays the number pad</li> <li>• Shows the alert notification for the incoming calls and incoming messages</li> </ul>
Click to Text	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.
Click to Call	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.

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Automatic Call Logging	<ul style="list-style-type: none"> <li>• 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.</li> <li>• An opportunity will automatically be associated with the incoming &amp; outgoing calls to the Contact/ Lead/ Account if the call is made while the user is on the Opportunity Details Page on Salesforce.</li> </ul>
Alert Notification	<ul style="list-style-type: none"> <li>• For incoming messages, the MultiLine for Salesforce beeps once. Recent message log shows the notification icon for the incoming message.</li> <li>• For incoming calls, the MultiLine for Salesforce rings and provides an interface to answer or reject the call.</li> </ul>
Notes	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.
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

<b>MultiLine Features Supported</b>	<b>Description</b>
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<b>MultiLine Features Supported</b>	<b>Description</b>
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.
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

<b>Features</b>	<b>Description</b>
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.

<b>Features</b>	<b>Description</b>
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"><li>1. User can dial their multiline number from the keypad in MultiLine for Salesforce.</li><li>2. The voicemail can be heard from the MutliLine app on their device.</li><li>3. Call MultiLine Number from any other device. Let the call go to the voicemail and then press * and password to hear the Voicemail.</li></ol>

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