

Messaging in MultiLine for Salesforce

Last Modified on 10/03/2022 8:55 am EDT

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

Overview

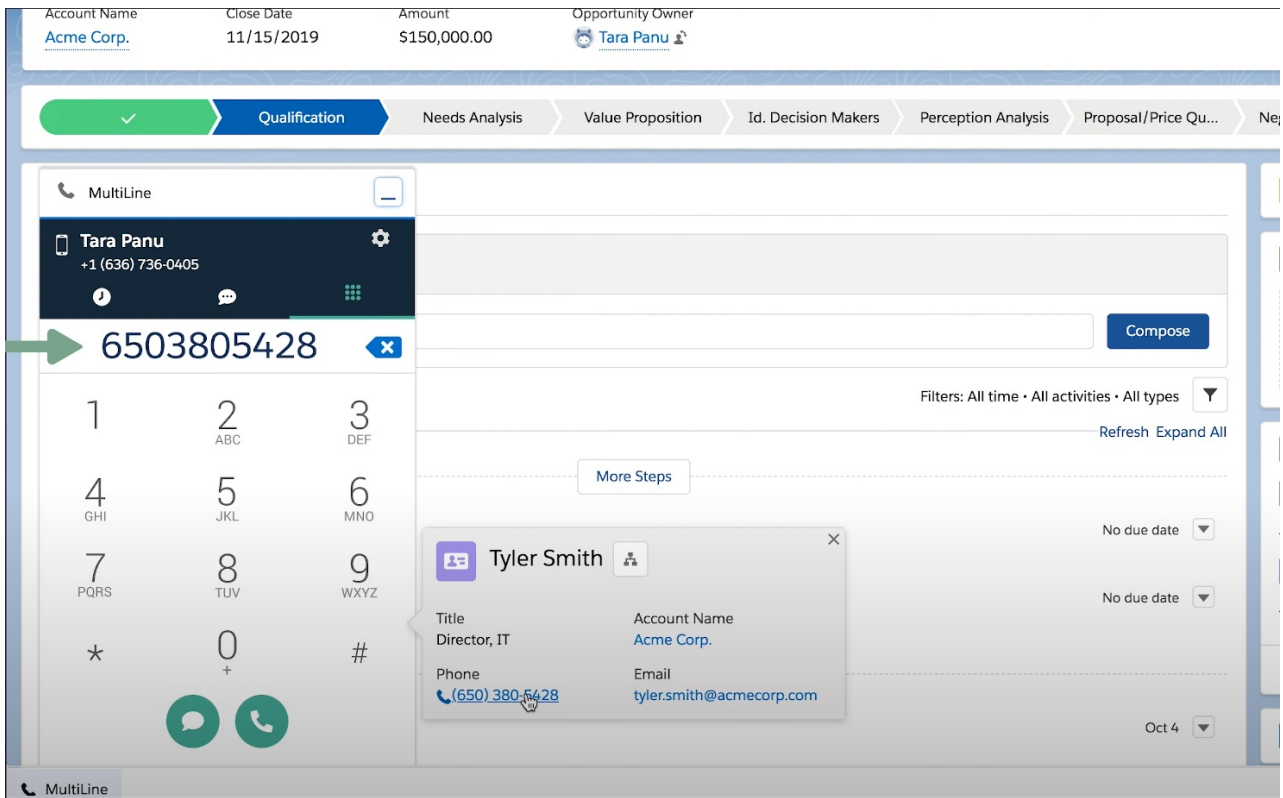
MultiLine for Salesforce offers robust messaging features, including:

- 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
- You can **add an Opportunity Tag to texts** (<https://moviuscorp.knowledgeowl.com/help/tag-an-opportunity>)

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



The screenshot displays the Salesforce MultiLine interface. At the top, account details for 'Acme Corp.' are shown, including the close date (11/15/2019), amount (\$150,000.00), and opportunity owner (Tara Panu). Below this is a navigation bar with stages: Qualification (active), Needs Analysis, Value Proposition, Id. Decision Makers, Perception Analysis, and Proposal/Price Qu... A 'MultiLine' widget is open, showing a contact card for 'Tara Panu' (+1 (636) 736-0405). The phone number '6503805428' is entered in the keypad. A green arrow points to the message icon in the keypad. A pop-up card for 'Tyler Smith' is visible, showing his title (Director, IT), account name (Acme Corp.), phone number ((650) 380-5428), and email (tyler.smith@acmecorp.com).



- Clicking on the message icon opens the message conversation thread with that number

 Opportunity
Compliance Contract- New Business

Account Name	Close Date	Amount
Acme Corp.	11/15/2019	\$150,000.00

✓ Qualification Needs Analysis

MultiLine

←  **Tyler Smith** 
6503805428

request to OPT-IN. Once they accept, you will be able to message with your contact.

Sep 24, 19, 03:03 PM

[Auto Message] Your Contact has opted in. You may continue to send/receive messages.

Sep 24, 19, 03:05 PM



Hi Tyler, let me know best time to reach you tomorrow.

Sep 24, 19, 03:04 PM

Hi Tara! I'm available between 3 PM and 6 PM Pacific.

Sep 24, 19, 03:05 PM

Great, I'll give you a call at 3. We need to discuss prep work for the technical workshop.

 I just s | 

←

MultiLine

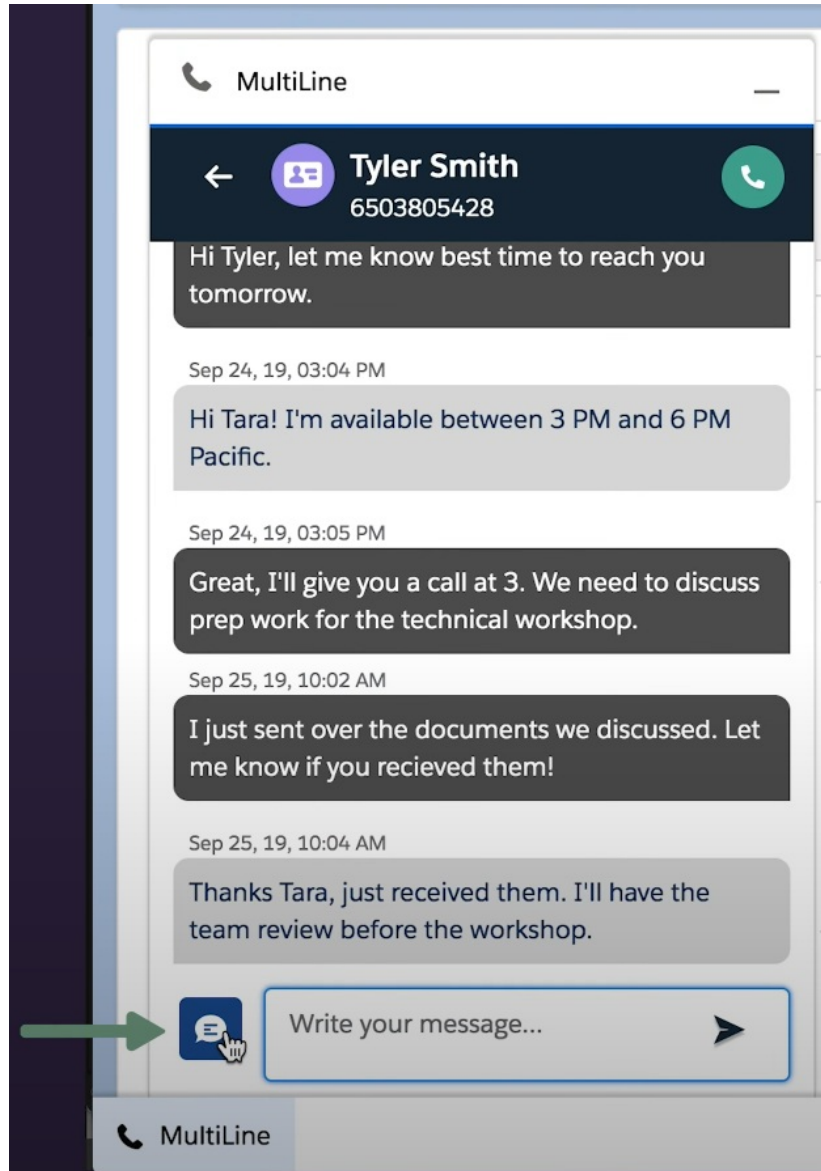
Using Quick Texts

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.

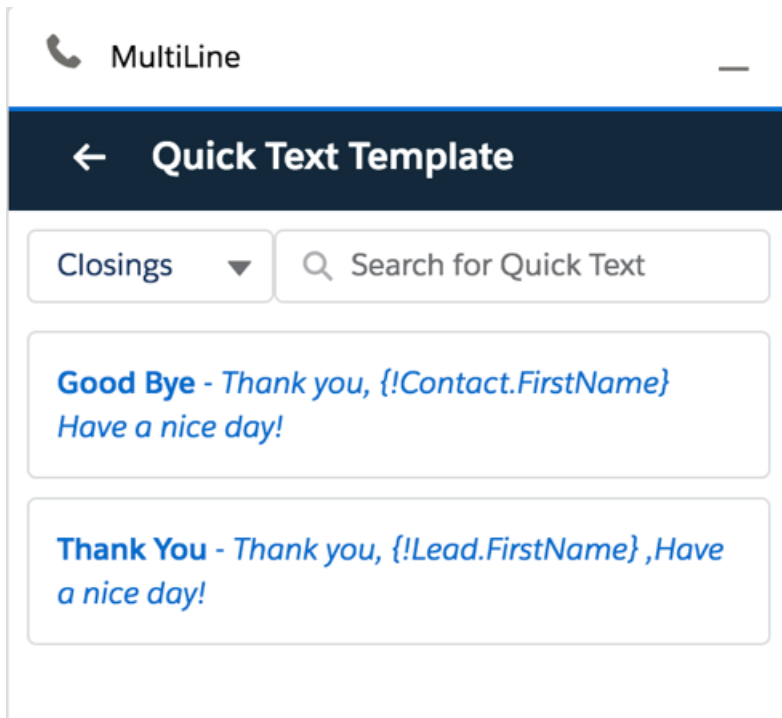
Refer to *Salesforce Help* (https://help.salesforce.com/articleView?id=quick_text_setting_up.htm&type=5) for more information on creating Quick Text messages and sharing them.

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.

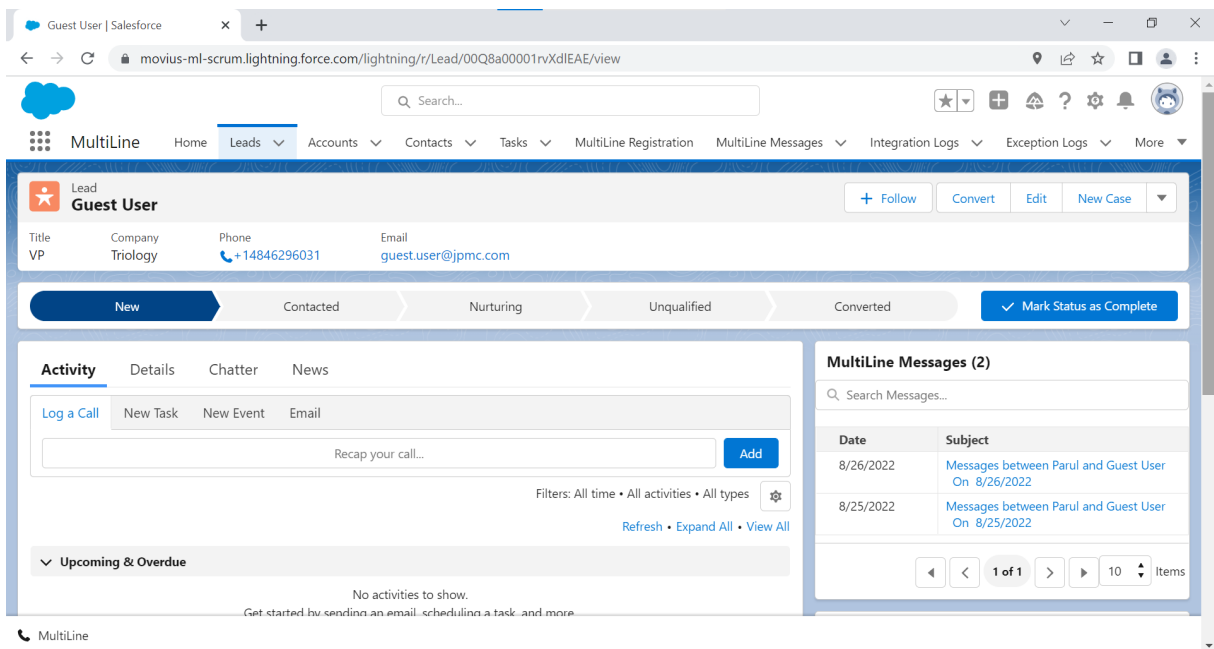


The content of the selected template will populate the message text area.

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.

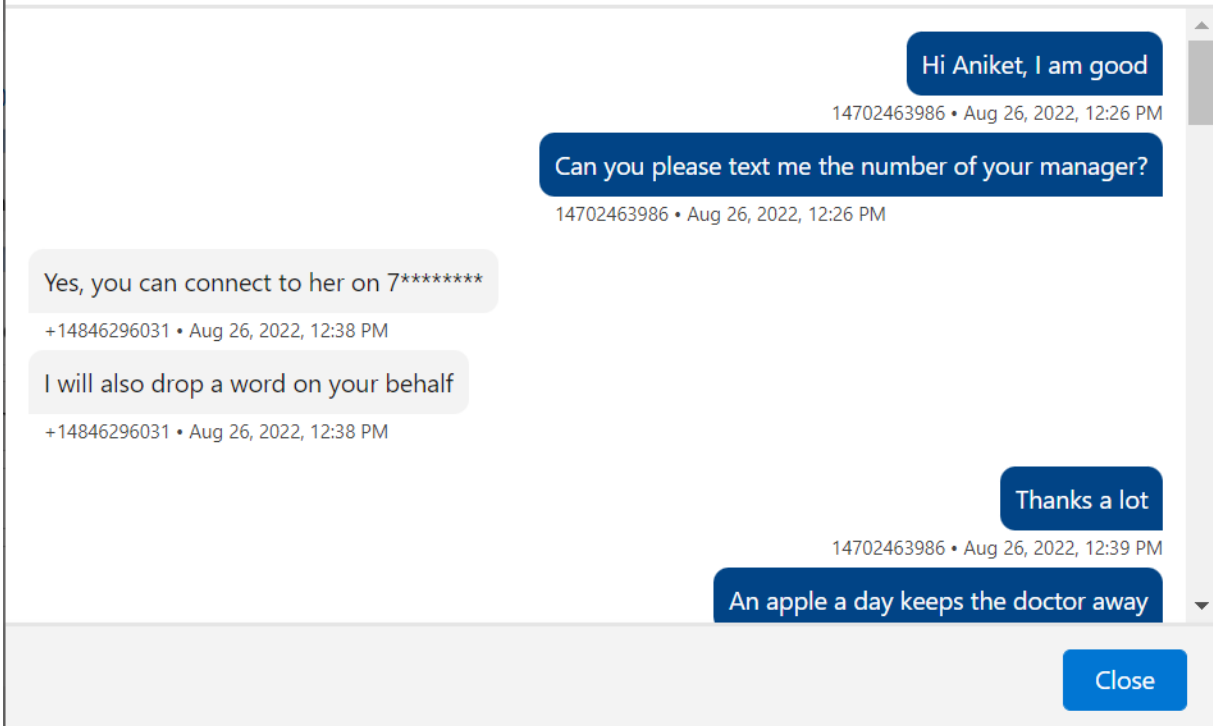
1. Access the Lead, Contact, or Account and click the text log from the MultiLine Messages panel.



2. The Daily Roll Up Record will display.

MultiLine Daily Roll Up Record

Messages between Parul and Guest User on 8/26/2022



The screenshot shows a text message conversation. The messages are as follows:

- Message 1 (Right):** "Hi Aniket, I am good" (14702463986 • Aug 26, 2022, 12:26 PM)
- Message 2 (Left):** "Can you please text me the number of your manager?" (14702463986 • Aug 26, 2022, 12:26 PM)
- Message 3 (Right):** "Yes, you can connect to her on 7*****" (+14846296031 • Aug 26, 2022, 12:38 PM)
- Message 4 (Left):** "I will also drop a word on your behalf" (+14846296031 • Aug 26, 2022, 12:38 PM)
- Message 5 (Right):** "Thanks a lot" (14702463986 • Aug 26, 2022, 12:39 PM)
- Message 6 (Left):** "An apple a day keeps the doctor away"

A "Close" button is located at the bottom right of the message window.