

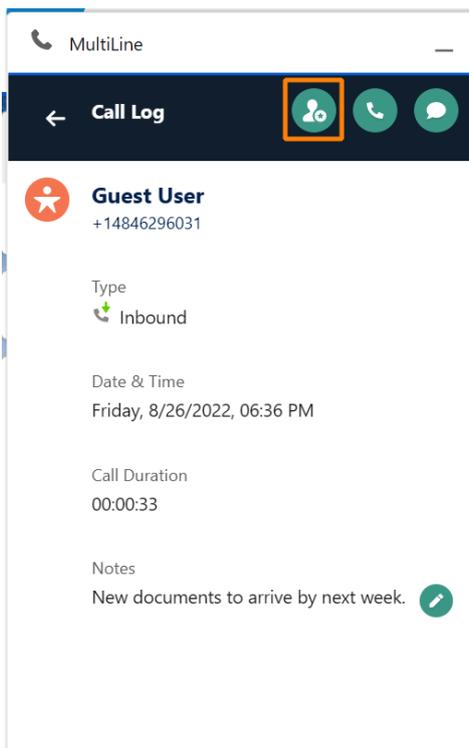
Tagging calls and texts with Opportunity

Last Modified on 09/07/2022 10:12 am EDT

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.

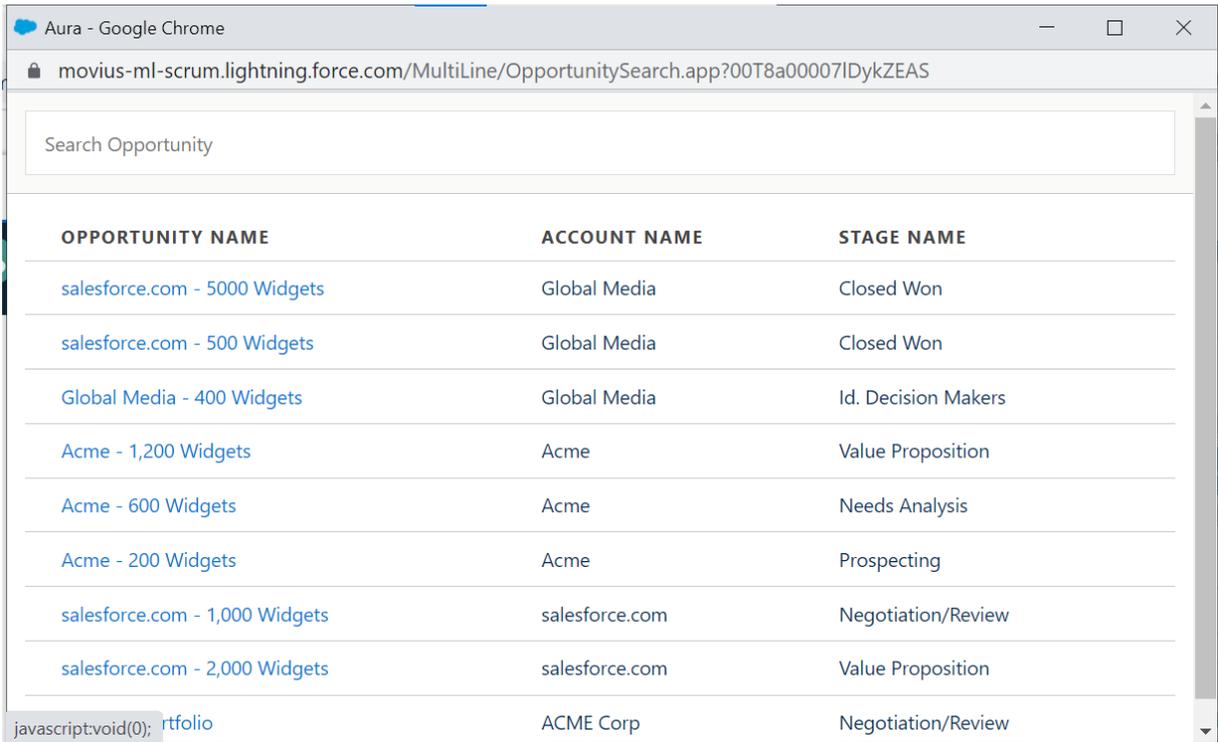


Before you start

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

How to add an Opportunity tag to a call

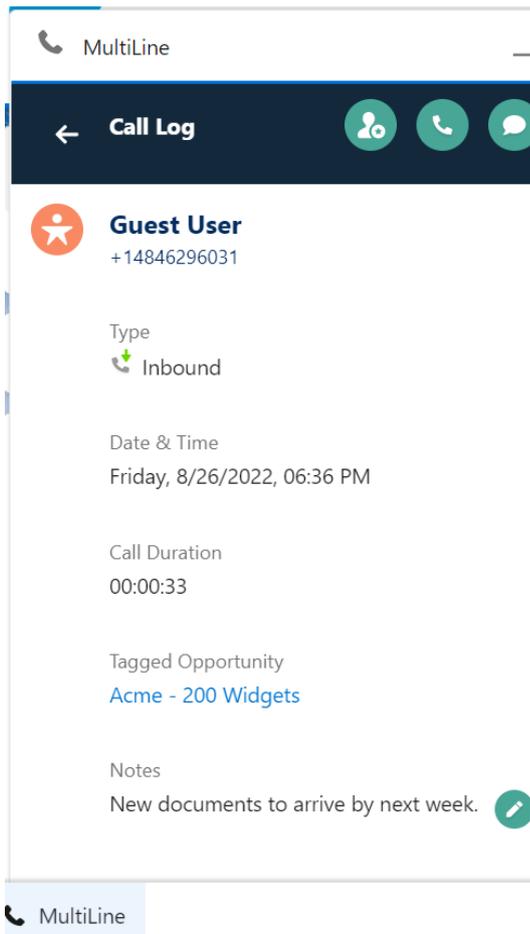
1. Click the **Tag Opportunity**  icon.
2. Select the **Opportunity**. *Note: begin typing Opportunity Name in the "Search Opportunity" window to narrow the list.*



A screenshot of a web browser window titled "Aura - Google Chrome". The address bar shows the URL: `movius-ml-scrum.lightning.force.com/MultiLine/OpportunitySearch.app?00T8a000071DykZEAS`. Below the address bar is a search input field labeled "Search Opportunity". The main content is a table with three columns: "OPPORTUNITY NAME", "ACCOUNT NAME", and "STAGE NAME". The table contains eight rows of data. At the bottom of the browser window, a small snippet of JavaScript code is visible: `javascript:void(0); rtfolio`.

OPPORTUNITY NAME	ACCOUNT NAME	STAGE NAME
salesforce.com - 5000 Widgets	Global Media	Closed Won
salesforce.com - 500 Widgets	Global Media	Closed Won
Global Media - 400 Widgets	Global Media	Id. Decision Makers
Acme - 1,200 Widgets	Acme	Value Proposition
Acme - 600 Widgets	Acme	Needs Analysis
Acme - 200 Widgets	Acme	Prospecting
salesforce.com - 1,000 Widgets	salesforce.com	Negotiation/Review
salesforce.com - 2,000 Widgets	salesforce.com	Value Proposition
<code>javascript:void(0); rtfolio</code>	ACME Corp	Negotiation/Review

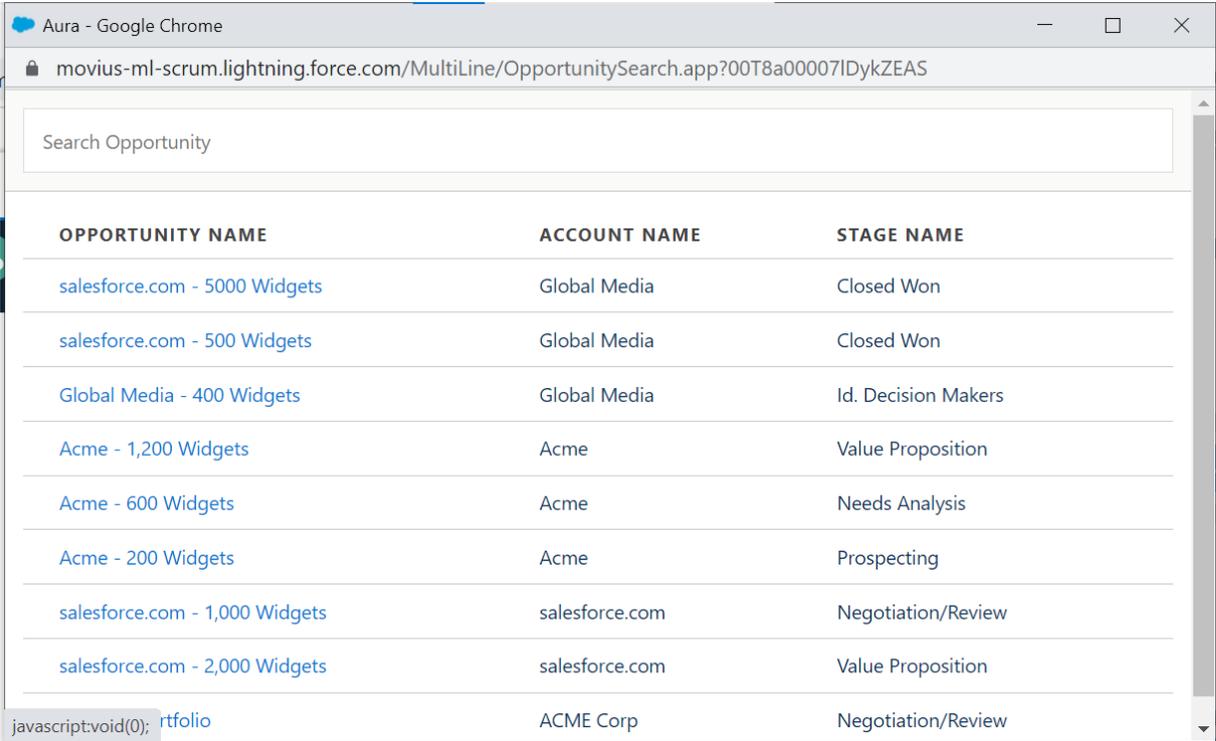
3. Click OK at the prompt and you'll see the tag reflected on your call log.



A screenshot of a mobile application interface showing a call log entry. The top bar is dark blue with a back arrow, the text "Call Log", and three circular icons (person, phone, speech bubble). Below this is the contact information for "Guest User" with the phone number "+14846296031". The call details include: "Type: Inbound" (with a green arrow icon), "Date & Time: Friday, 8/26/2022, 06:36 PM", and "Call Duration: 00:00:33". The "Tagged Opportunity" is listed as "[Acme - 200 Widgets](#)". At the bottom, there is a "Notes" section with the text "New documents to arrive by next week." and a green pencil icon for editing. The bottom of the screen shows a "MultiLine" label with a phone icon.

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.*



The screenshot shows a web browser window titled "Aura - Google Chrome" with the URL "movius-ml-scrum.lightning.force.com/MultiLine/OpportunitySearch.app?00T8a00007IDykZEAS". The page features a search bar labeled "Search Opportunity" and a table of search results. The table has three columns: "OPPORTUNITY NAME", "ACCOUNT NAME", and "STAGE NAME".

OPPORTUNITY NAME	ACCOUNT NAME	STAGE NAME
salesforce.com - 5000 Widgets	Global Media	Closed Won
salesforce.com - 500 Widgets	Global Media	Closed Won
Global Media - 400 Widgets	Global Media	Id. Decision Makers
Acme - 1,200 Widgets	Acme	Value Proposition
Acme - 600 Widgets	Acme	Needs Analysis
Acme - 200 Widgets	Acme	Prospecting
salesforce.com - 1,000 Widgets	salesforce.com	Negotiation/Review
salesforce.com - 2,000 Widgets	salesforce.com	Value Proposition
javascript:void(0); rtfolio	ACME Corp	Negotiation/Review

3. Click **OK** at the prompt and you'll see the Opportunity reflected on your text log.

