

Bulk User Import Configuration For Salesforce

Last Modified on 02/01/2023 11:05 am EST

Read on to learn about bulk user import configuration for Salesforce Administrator.

Overview

For organizations that need to provision many users, it is possible to bulk import them using these configuration instructions. These instructions will allow the administrator to onboard the users in batches to Salesforce saving time and effort.

Before you start

- These instructions are for the Salesforce Administrator.
- MultiLine Administrator and Salesforce Administrator must have completed pre-requisite steps.
 - [MultiLine for Salesforce Installation Guide for Salesforce Lightning 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>)
 - [MultiLine for Salesforce Installation Guide for MultiLine Admins](https://help.moviuscorp.com/help/install-guide-salesforce-connector)
(<https://help.moviuscorp.com/help/install-guide-salesforce-connector>)

MultiLine Bulk User Import Configuration

To create your MultiLine Bulk User Import Configuration, you will:

1. Set the type of MultiLine Invites allowed (Salesforce invitations, Movius invitations, or both)
2. Set the Bulk Provision Target
3. Set the BP Admin
4. Set the Batch Job Frequency
5. Set the Batch Job to Active or Inactive
6. Configure

1. Set the type of MultiLine Invites allowed

There are three options available Both, Salesforce Only and Movius Only.

- With “Both”: Users will receive emails from both the Salesforce and Movius environments.
- With “Salesforce Only”: Users will receive an email from Salesforce platform.
- With “Movius”: Users will receive an email from the Movius environment.

Bulk User Configuration

Allowed Multiline Invites*
Bulk Provision Target Name *
BP Admin Email Id(s) *
Batch Job Frequency
Active Schedule

Both
 Salesforce Only
 Movius Only

virendra.khatke@movius.ai

Minutes Hourly Daily

15 Minutes

Active

Cancel Configure

2. Set the Bulk Provision Target

Select **Bulk Provision Target Name** from the dropdown. This field points to Movius server instance.

Bulk User Configuration

Allowed Multiline Invites*
Bulk Provision Target Name *
BP Admin Email Id(s) *
Batch Job Frequency
Active Schedule

Both
--None--
 geotest

virendra.khatke@movius.ai

Minutes Hourly Daily

15 Minutes

Active

Cancel Configure

3. Set the BP Admin

- Provide email IDs to receive emails for the list of Email Invites, Successful Jobs, and Failed Jobs.
- A maximum of 5 emails can be provided in this field with a comma separator.

Bulk User Configuration

Allowed Multiline Invites*	<input type="text" value="Both"/>
Bulk Provision Target Name *	<input type="text" value="uatgeo"/>
BP Admin Email Id(s) *	<input type="text" value="virendra.khatke@movius.ai,khatkevirendra1290@gmail.com"/>

4. Set the Batch Job Frequency

For **Batch Job Frequency**, the user selects which time interval user wants to run the batch job. There are three tabs of options: Minutes, Hourly, and Daily.

4.1 Frequency (Minutes)

The Minutes tab allows you to set the batch job to run every 15 minutes or 30 minutes.

1. Go to **Minutes** tab.
2. Select the desired option (**15** or **30**) from the dropdown menu.
 - 15: The job will run every 15 Minutes
 - 30: The job will run every 30 Minutes.

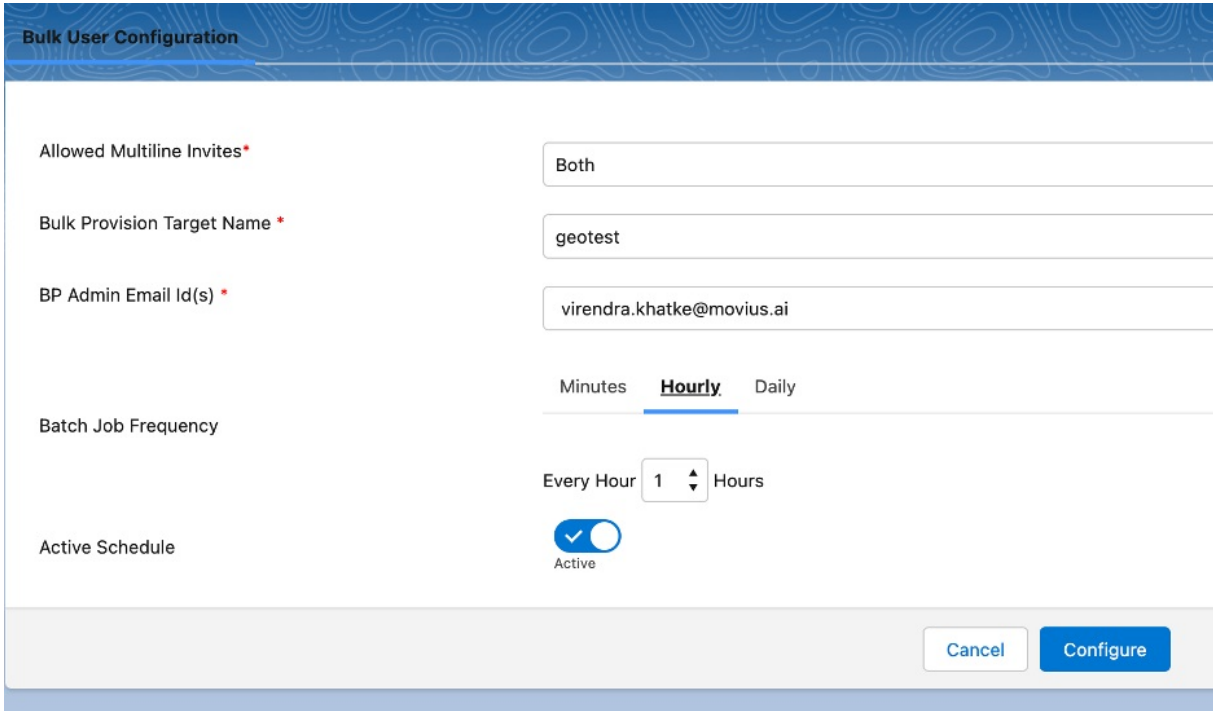
Bulk User Configuration

Allowed Multiline Invites*	<input type="text" value="Both"/>
Bulk Provision Target Name *	<input type="text" value="geotest"/>
BP Admin Email Id(s) *	<input type="text" value="virendra.khatke@movius.ai"/>
Batch Job Frequency	Minutes Hourly Daily
Active Schedule	<input checked="" type="radio"/> 15 Minutes <input type="radio"/> 30 Active

4.2 Frequency (Hourly)

The Hourly tab allows you to set the batch job to run a designated number of hours.

1. Go to the **Hourly** tab.
2. Use the **Every Hour** menu to select how many hours should elapse between each run.



The screenshot shows the 'Bulk User Configuration' interface. It includes the following fields and controls:

- Allowed Multiline Invites***: A text input field containing 'Both'.
- Bulk Provision Target Name ***: A text input field containing 'geotest'.
- BP Admin Email Id(s) ***: A text input field containing 'virendra.khatke@movius.ai'.
- Batch Job Frequency**: A section with two radio buttons, 'Minutes' and 'Hourly' (which is selected and underlined), and 'Daily'.
- Every Hour**: A dropdown menu showing '1' with up and down arrows, followed by the word 'Hours'.
- Active Schedule**: A toggle switch that is currently turned on, with a checkmark icon and the word 'Active' below it.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Configure'.

4.3 Frequency (Daily)

The Daily tab allows you to set the batch job to run **Everyday (Monday-Sunday)** or **Every weekday (Monday-Friday)** at a designated time.

1. Go to **Daily** tab.
2. Select the desired radio option from the menu:
 - o **Everyday**
 - o **Every weekday (Monday-Friday)**
3. Select the desired time option from the **Starts Hour** menu:
 1. **Hours:** Set the hour (1-12).
 - Example: Select "8" for "8:11 PM"
 2. **Minutes:** Set the Minutes (0-59).
 - Example: Select "11" for "8:11 PM"
 3. Set **AM** or **PM**
 - Example: Select "PM" for 8:11 PM"

Bulk User Configuration

Allowed Multiline Invites*

Both

Bulk Provision Target Name *

geotest

BP Admin Email Id(s) *

virendra.khatke@movius.ai

Minutes Hourly **Daily**

Batch Job Frequency

- Everyday
 Every weekday (Monday-Friday)

Starts Hour 5 Hours : 24 Minutes PM

Active Schedule



Active

Cancel

Configure

5. Active Schedule

You can set the **Active Schedule** to "Active" or "Inactive".

- Set the **Active Schedule** toggle to "Active" for the batch job to run according to your selections once configured.

Active Schedule



Active

- Set the **Active Schedule** toggle to "Inactive", and the batch job will be paused. The scheduled job will run, but the actions that are configured will not take place.

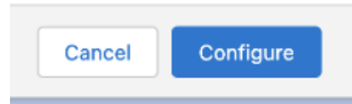
Active Schedule



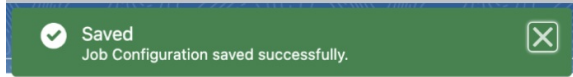
Inactive

6. Click Configure

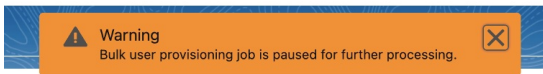
1. After making your selections, click **Configure** to complete.



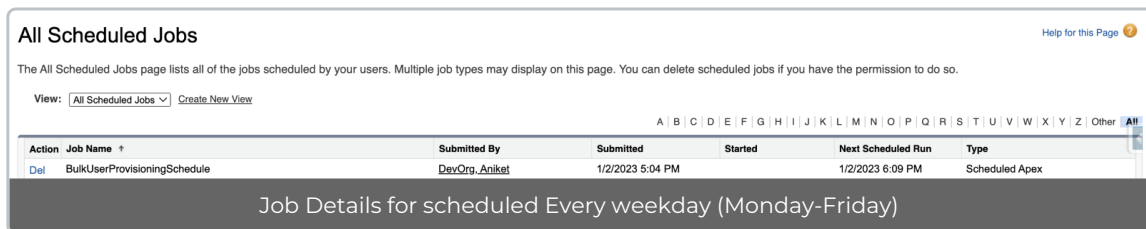
- Batch jobs will be scheduled as per the selected configuration.
- If you set the **Active Schedule** to "Active", a confirmation message will appear:



- If you set the **Active Schedule** to "Inactive", you will see a message that the job is paused:



- Click the confirmation message to visit the **All Scheduled Jobs** page



All Scheduled Jobs Help for this Page

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: All Scheduled Jobs Create New View

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	BulkUserProvisioningSchedule	DevOrg_Anilket	1/2/2023 5:04 PM		1/2/2023 6:09 PM	Scheduled Apex

Job Details for scheduled Every weekday (Monday-Friday)

- The BP Admin Email Id(s) will receive the list of Email Invites, Successful Users, and Failed Users list.

You have completed the bulk user import configuration steps.