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Movius Alloy For Microsoft TEams

MESSAGING APPLICATION AND VOICE INTEGRATION

User Guide

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Brand Change Disclaimer

Throughout this document there may be discrepancies between the image and the text. The images are displayed for illustrative purposes.

Purpose of this document

The document will describe m-Connect messaging and voice capabilities.

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Audience

This document is for Movius customers, partners and resellers engaged in the utilization and configuration of m-Connect for Microsoft Teams. In this document we will cover the capabilities of both the m-Connect application and MultiLine voice integration.

Benefits

m-Connect for Microsoft Teams offers many benefits to customers:

- **Unified Communication:** Seamless communication with employees, partners, prospects, and clients within a unified application while adhering to compliance obligations.
- **Effortless Calling Experience:** Use Teams' direct routing capability for native calling experience, frictionless call transfers across devices - from desktop Teams app to mobile Teams app and vice versa.
- **Cross-Platform Messaging:** Messaging capabilities mirror the MultiLine mobile application, facilitating inbound and outbound messaging through various channels like SMS, WhatsApp, WeChat, and Line.
- **Synchronized Call and Message Management:** Call and messages synchronization across Multiline for Teams and the MultiLine mobile application, providing users with unified access to call history, voicemail, and messages.

m-Connect for Microsoft Teams

MultiLine Messaging is rebranded as m-Connect application that is available in 3.X version of the app and will be the next major upgrade. Organizations using m-Connect for Microsoft Teams empower their employees to send and receive messages with their *MultiLine number* directly within the MS Teams interface.

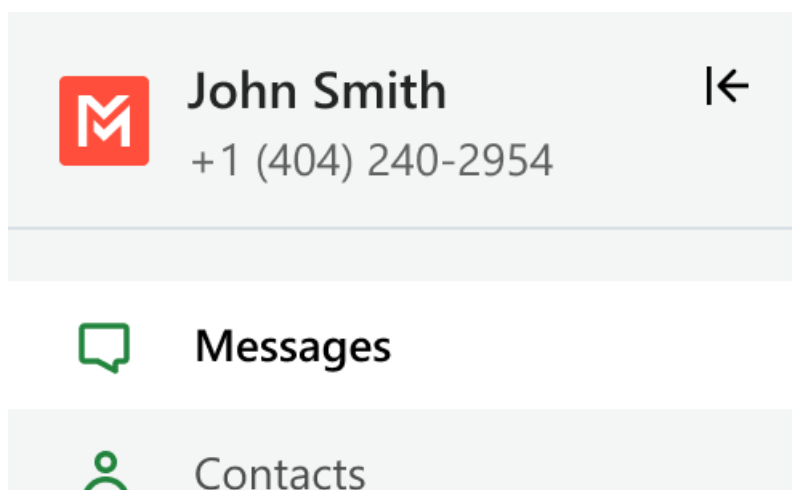
Messages sent to the user's MultiLine number will be received in both the MultiLine app on their mobile device and the m-Connect app within Microsoft Teams.

m-Connect is a multi-page application in contrast to MultiLine messaging which was a Single Web Page(SWP), information is organized on 4 different panel across these 4 pages in desktop application.

Note: Social messaging conversations from WhatsApp, WeChat & Line are available only when these channels are enabled for the user and their organization.

Quick Access Panel - I

The first panel can be expanded or collapsed by clicking on Movius logo on top left of the application. There are 4 tabs in first panel which will direct user to Messages, Contacts, Recent Calls/Voicemails and Settings. First panel will also hold Favorite contacts and Pinned conversations.





Recent Calls



Settings

FAVORITES

12

[View all](#)



Ray Tanaka



Marie Beaudouin



Diamond Smith



Brianna Adams

PINNED CHATS

3



Oscar Krogh and 4 more



Sam Smith: Thanks! Have a...



Beth Davies and 2 more

You: Could you call me wh...



Kian Lambert

You: Could you call me wh...

- Click on Movius logo to expand the quick access panel and navigate to other sections of the app.
- MultiLine or Native Sim number will be displayed below the Movius logo.
- Click on the arrow to collapse quick access panel.
- **Messages** tab will direct users to the conversations and messages screen.
- **Contacts** tab will direct users to Outlook contacts & distribution list.
- **Recent Calls** will direct users to combined call history for the calls made from different Movius application.
- **Settings** will direct users to the personalization and help page.
- **Favorites** section will display the contacts marked as favorites in Outlook or on Contacts page.
 - Clicking on one of the favorites contacts will direct to contacts page to display contact details.
 - Click on '**See All**' in Favorites section will display the list of Favorite contacts on Contacts page.
- Pinned conversations will display the conversations that have been prioritized for user.
 - Pinned conversations are also

Messaging

Let's look at messaging capabilities within m-Connect application in Microsoft Teams.

Overview

m-Connect currently supports SMS, picture messaging (JPG), and social messaging through WhatsApp, WeChat, and Line applications on desktop and mobile Teams applications. These messaging channels can be enabled by organization through [MMP configuration](#).

m-Connect messaging features '**Connected Conversations**' capability that groups messages from different channels and numbers under the contact where a number is present.

1. Search the message content and contacts with conversations on any one messaging channel.
2. Start Conversation on SMS and WhatsApp. Compose Bulk Messages.
3. Filter conversations with Favorite contacts, MultiLine numbers and conversations that are Unread.
4. All tab Display a consolidated view of messages from different channels, one of one and group messages.

5. Direct tab displays one on one messages on SMS, WhatsApp, WeChat or Line.
6. Groups tab displays the group conversations on SMS, WhatsApp, WeChat & Line. These groups conversations have MultiLine user as one of the participants.
7. Displays the date & time of the last message on the conversation. Timezone is based on the machine of user.
8. Displays the pinned conversation threads on top of the list.
9. Displays the count of messages that are not read on the conversations.
10. Identify the conversation with a another MultiLine number or contact in the organization of user.
11. Displays the Unread conversation in bold.
12. Displays the Unread conversation with a dot.
13. Indicates that conversation is muted and will not make sound when new message is received on the thread.
14. Indicates a group conversation.
15. Indicates the last message was on Line.
16. Indicates the last message was on WhatsApp
17. Indicates the last message was on WeChat
18. Indicated the last message was on SMS.
19. Displays the initials of saved contacts.
20. Indicates that the conversation is on a new unsaved number.
21. Display the option to delete a conversation, pin a conversation.
 - a. Unsaved numbers will display the option to create a new contact or add to existing contact.

Conversations Panel - II

2

Messages



All Direct Groups



Archived Chats



Matthew White: Hi, would you be...



Kian Lambert

Yesterday



Have you run this by Beth? M...



Emiliano Ceballos



1:55 PM



3



Beth Davies

1:00 PM



Could you call me when you'r...



Oscar Krogh

1:00 PM



You: Thanks! Have a nice

25



Kian Lambert and 2 more

Yesterday



You: Okay, let's discuss it next...



+1 404 267 3947



Yesterday



No, I think there are other alt...



Amanda Brady

Yesterday



Could you call me when you'r...

21

20

14

19

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1

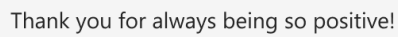
Message Window Panel - III

9

8



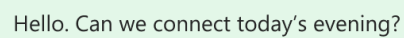
Beth Davies 11:14 AM



Beth Davies 11:17 AM



Thank you for the information. Let me check that for you. It appears there was an error in processing. I'll initiate a refund for the incorrect amount immediately



Contact number: Mobile: +1 404 293 8745 ▾

23

22

20

15

14

12th

10

13

21

19

18

17

16

7

Message Window Header - A

A1	• Displays the name of the contact communicating with m-Connect user. • Clicking on Contact Name opens the 4th panel with contact details.
A2	The 'All' tab appears when a user has messages from a contact or number on multiple channels but is hidden if there's only one channel of communication.
A3	WhatsApp tab will display text and picture messages from WhatsApp channel.
A4	SMS tab will be displaying text and picture messages on SMS.
A5	LINE tab will display text and picture messages on LINE channel.
A6	Voicemail tab will display the voicemails received from the contact or numbers.
A7	This arrow is displayed when there are messages from 2 or more numbers on a channel. Clicking on the arrow will display the numbers in dropdown that user can click on and view the messages on different numbers linked to a contact on that specific channel. In this event
A8	The search function will present relevant results from conversations associated with the contact.

Message Window Header - A

	Displays the option to add participants on social messaging conversation (WhatsApp, WeChat & LINE).
A9	- Displays the option to leave a social messaging conversation (WhatsApp, WeChat & LINE). - Displays the option to delete channel. Social Messaging channel can be deleted only when inactive.

Message Window - B

B10	Indicates that message was received on WeChat from the contact.
B11	Indicates the date & time message was received. Timezone is based on the machine of the user.
B12	Indicates voicemail was received from the contact.
B13	Clicking the Play button will begin playback of the voicemail.
B14	Shows a missed call from the contact, visible only when Calling is enabled.
B15	Gray bubble indicates that message was received from the contact.
B16	Green bubble indicates that message was sent to a contact.
B17	Indicates the text message was sent on SMS channel.
B18	Indicates the text message was sent on WhatsApp channel.

Message Compose Box - C

C19	- Indicates the channel from which the most recent message was received or sent. - The channel is updated automatically according to the channel from which the most recent message was received or sent. - The user can update the designated channel for sending messages. - Displayed only on All tab.
C20	PNG or JPG images can be selected for sending to a contact.
C21	Emojis can be selected for sending to a contact.
C22	The compose message field becomes active when sending a message to the contact. The field will appear grayed out when the channel is inactive.
C23	- Contact number is dynamically updated to the number where most recent message was received or sent. - User can update the contact number to which they want to send the message. - Displayed only on All tab.
C24	The Send button activates when text is entered in the message field.

1. Close the 4th panel
2. Displays the name of contact stored in Outlook.
3. Displays the number of the contact in Outlook.

- a. If multiple numbers are present Business Phone number will be considered primary.
4. Start a conversation on SMS or WhatsApp.
 - a. If an active conversation exists then user will be directed to existing conversation.
5. Search the messages for all conversations from the contact.
 - a. Search will not display if there are no conversations with the contact.
6. Mute conversations created with contact.
7. Displays additional option for managing contacts.
8. Edit the contact details and synchronize updated details with Outlook.
9. Flag contacts as Favorites.
10. Block messages from the contact.
11. Delete the contact from Outlook.
 - a. Existing conversations are still available and linked to the numbers.
12. Expand the Overview section.
13. Displays the name of company of contact.
14. Displays the number saved as Mobile type for contact.
15. Displays the number saved as Home type for contact.
16. Displays the number saved as Office type for contact.
17. Displays the email of the contact.
18. Displays the tags assigned to contact.
 - a. Tags are stored as Categories in Contacts
19. Displays the list of Pinned messages with the contact.
20. This section is being worked upon and will be available in upcoming release.
21. Displays the list of group conversations with this contact.
22. Document important topics discussed with contact as Notes.
 - a. Messages can be added to notes by clicking on 'Add to Note' option on a message.

Contact Details Panel - IV



Beth Davies

+1 404 293 8745



Overview

Company

JPMC

Mobile

+1 404

Home

+1 404

Office

+1 404 332 8929

Email

Alex.Brown@jpmc.com

Tags

Co-workers

Top Client

Edit contact

Add to favorite

Block contact

Delete contact

Pinned Messages

Media, Links, and Docs

Groups

Notes

4

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1

Send Messages

1. To send a message, go to the MultiLine Messaging app.

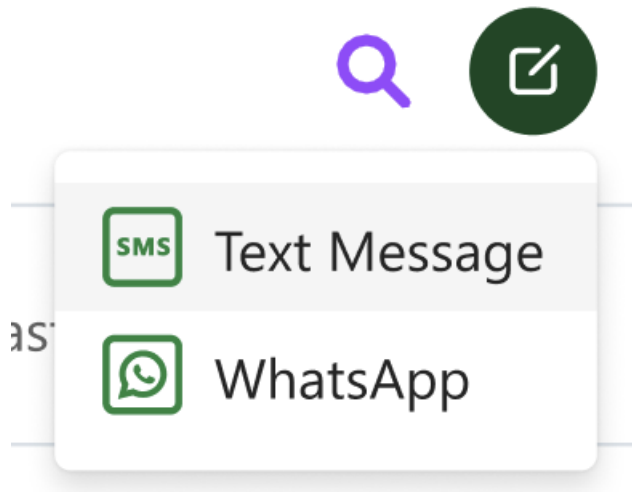


2. Click the

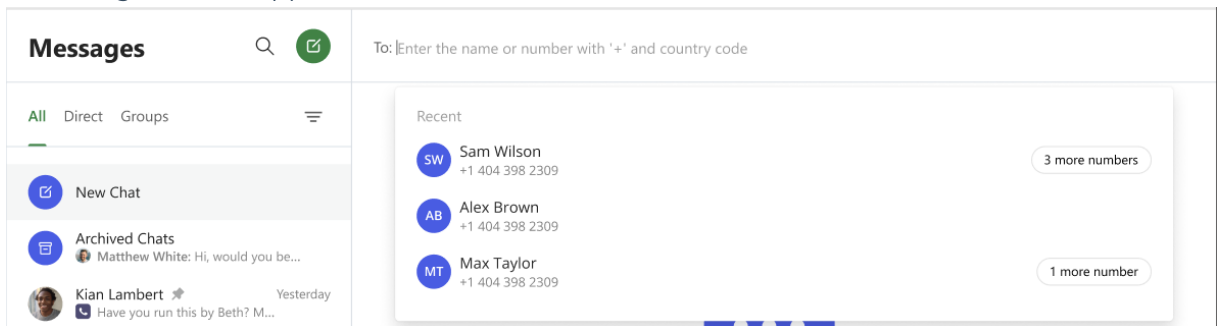


Start Conversation icon.

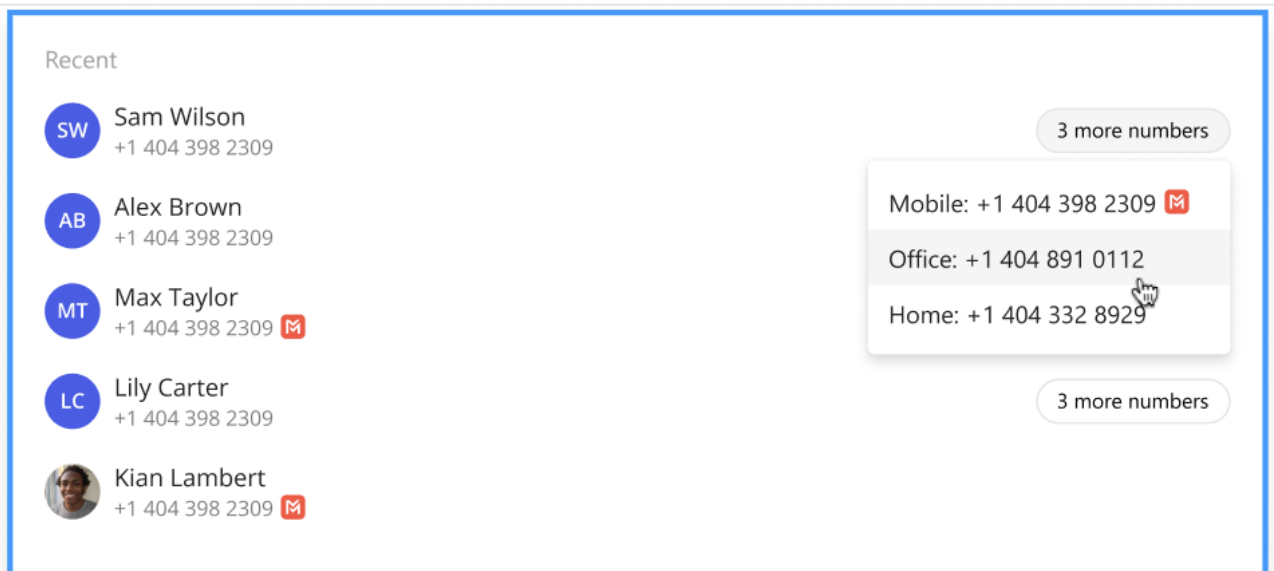
3. Select the type of message.



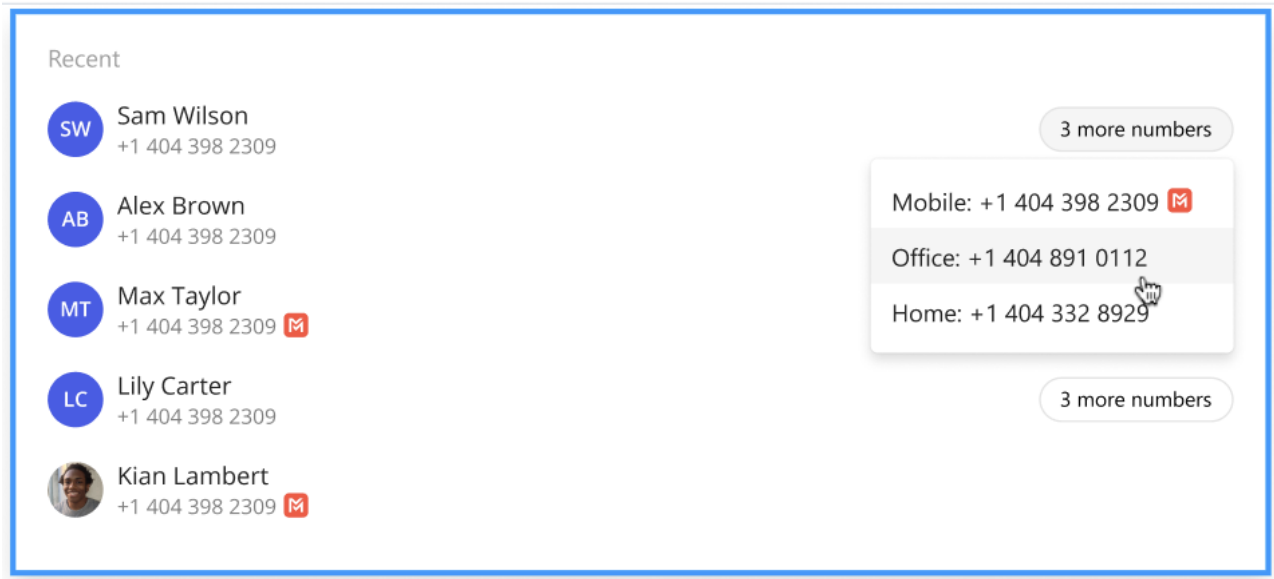
4. They enter who you want to send the message to. As name or phone number is typed, a list of matching contacts appear.



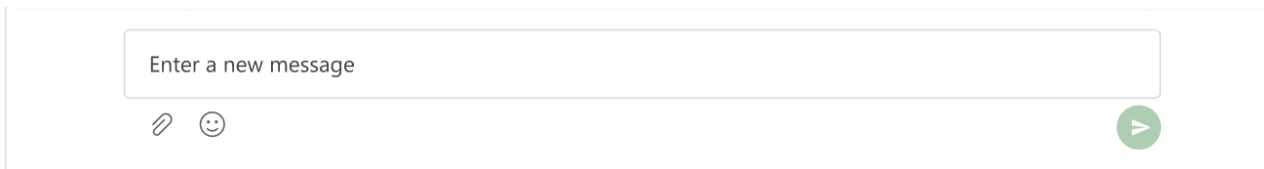
5. Switch the number you want to send message to a secondary number on the contact. Number tagged as a Business type is displayed as Primary number on the field.



6. Select upto 10 participants for sending a Group SMS.

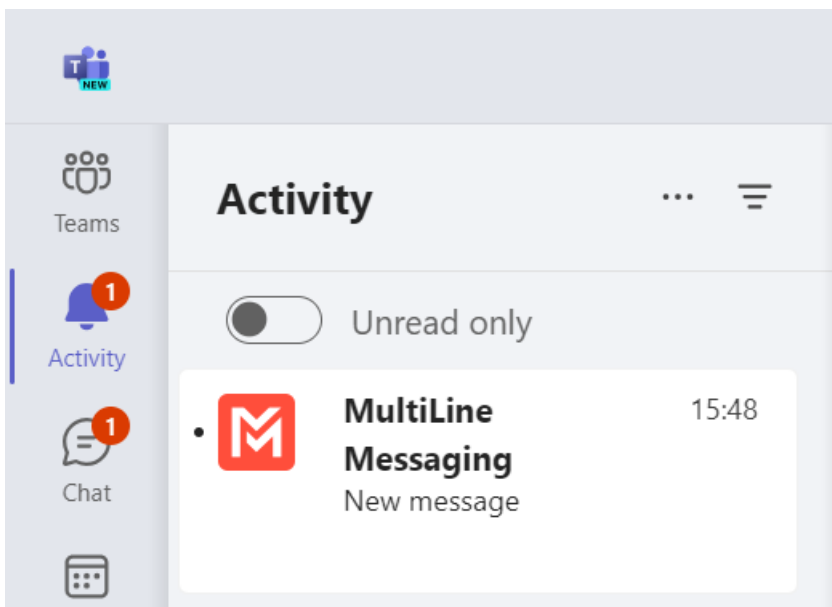


Enter a message. Add jpg/png image files or select emojis, if desired.



Receive Messages

When users receive a message, a banner notification appears. The notification will also appear in the Activity feed. The new messages are easily accessible by selecting these notifications.



Search Conversations and Messages

The Search bar allows users to locate messages across all conversations. When there are multiple matches within a conversation, results are grouped and shown on the fourth panel. The search function provides results from both message content and contact names.

Messages



Kia| 

CHATS



Kian Lambert and 2 more

 You: Okay, let's discuss it next...

Yesterday



Kian Lambert

 Have you run this by Beth? M...

Yesterday

MESSAGE CONTENT



Emiliano Ceballos

3 matched messages

1:55 PM



Beth Davies

 Hello. Could you call me whe...

1:00 PM



Amanda Brady

 Hello. Hope you're doing well...

Yesterday

Click the Search icon in the message window header to lookup messages from a specific contact. This search is available in 4th panel.

Search

×

Hello

×

RESULTS 3

EC

Emiliano Ceballos

Sep 25, 2024, 8:04 PM

Hello. I really appreciate your prompt assista...

EC

Emiliano Ceballos

Sep 25, 2024, 8:04 PM

Hello. I really appreciate your prompt assista...

EC

Emiliano Ceballos

Sep 25, 2024, 8:04 PM

Hello. I really appreciate your prompt assista...

Managing Conversations

Hovering over the conversations will expose additional options.

- Users can pin or unpin conversations. Pinned conversations are currently synchronized across both Desktop and Mobile Teams platforms.
- Users have the option to mark conversations as read. After a conversation is marked as read, it will no longer appear highlighted in the conversation list.

All Direct Groups



**John Doe**

Resume Conversation



**63758**
DoorDa



**Abhinav**
test ac



**+9916800152**



- Pin
- Add to existing contact
- Create new contact
- Mark as Read

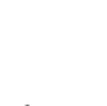
Chats from an unsaved number show options to add it to an existing contact or create a new one.

**+91 99023 97013**

You left the conversation.



**+1 (617)**
Its, Nata



**Lakshmi**
Check if



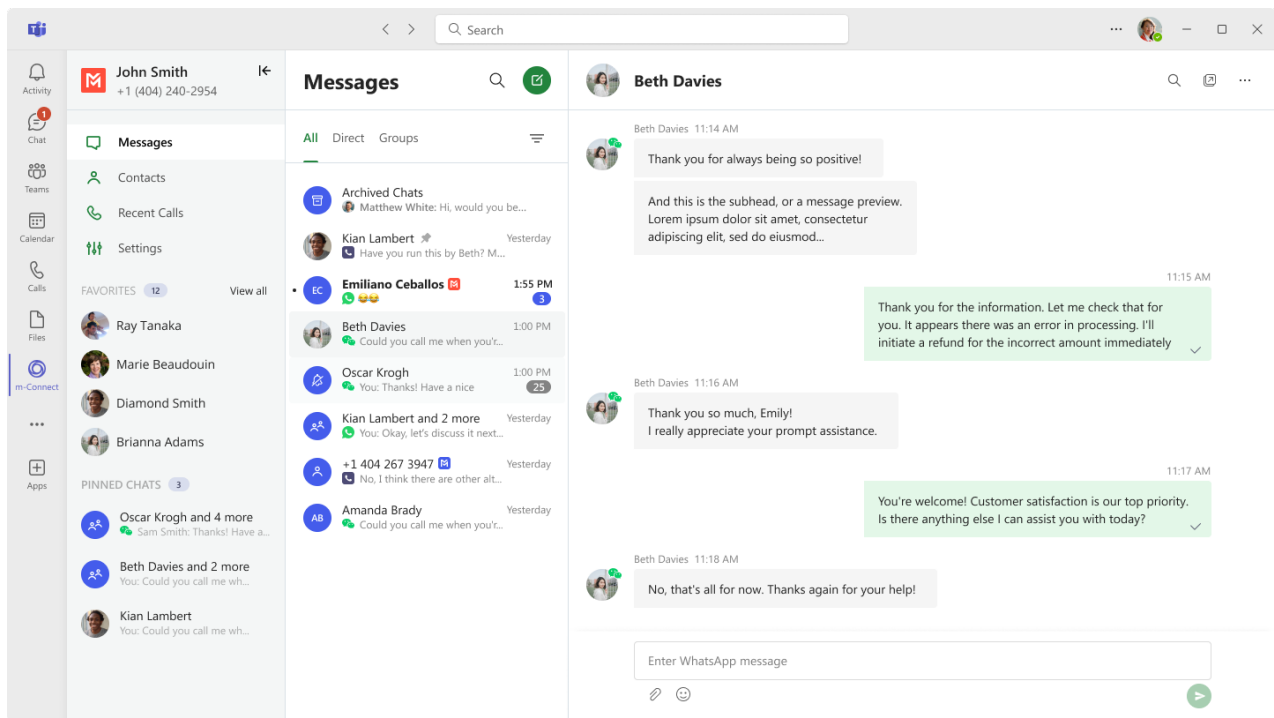
**Abhinav**
One mo



- Pin
- Add to existing contact
- Create new contact
- Mark as Read
- Delete

Users can delete inactive conversations. Delete option will not be available if there is an active conversation on a social messaging channel (WhatsApp, WeChat and LINE).

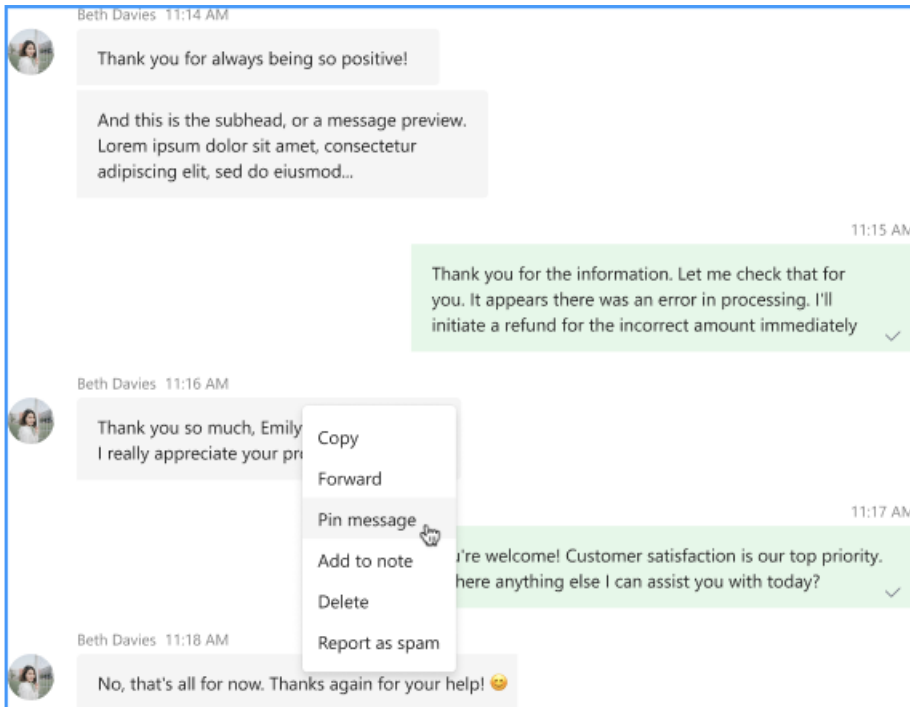
Note: The 'All' tab does not appear when the conversation takes place in a single channel.



Managing Messages

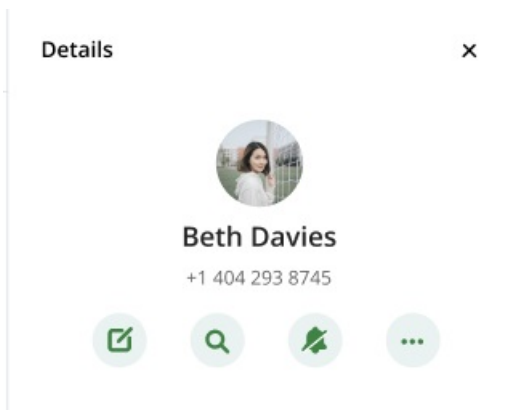
Each message in the message window will display the following options, accessible either by hovering over the message or by right-clicking on it.

1. Copy - Copies the content of the message.
2. Forward - Forwards the message as SMS.
3. Pin message - Pins an individual message at the top of the message window.
4. Add to note - Adds the message to the contact's Note along with the date it was added. This feature is not available in group messages and can only be used in one-on-one messages.
5. Delete - Removes the message from the message window. The delete option is not available on Active.



Mute Conversations

Conversation threads can be muted by clicking on Bell icon on the contacts on 4th panel.



WhatsApp Messages

WhatsApp connector has some unique features compared to SMS or other social messages. Movius uses customer's WhatsApp Business account to send/receive messages to their customers.

Opt-In Messages

Opt-in is required for business users to message WhatsApp users. MultiLine takes care of the opt-in process. Once the WhatsApp user opts in, messaging can begin.

Template Messages

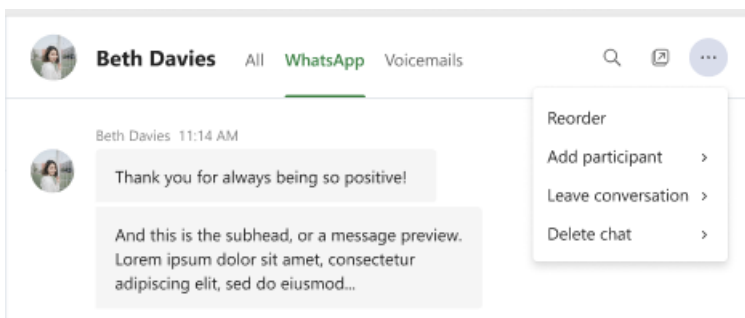
After a WhatsApp contact hasn't replied to a conversation with a WhatsApp Business account user for more than 24-hours, Meta requires Business users to use pre-set templates (<https://developers.facebook.com/docs/whatsapp/message-templates/guidelines/>) to message users. These templates are pre-vetted to not contain spam, promotional materials, or other content

in violation of Meta Business policies. If more than 24 hours have passed since the user's last message and a new message is sent, it will be placed in a queue and WhatsApp will notify the user with a pre-defined template that MultiLine user is attempting to contact them. By default, up to five messages can be queued; additional messages beyond this limit will not be delivered.

The m-Connect application consolidates all historical WhatsApp conversations into a unified thread. At any time, only one active one-on-one conversation thread may exist with a WhatsApp user, although it is possible to have multiple group chats involving the same contact. If a user attempts to initiate a new WhatsApp conversation while an existing conversation is active, they will be directed to the current conversation.

Leave Conversation

A MultiLine user has the option to exit an active WhatsApp conversation via the Message header. Upon leaving, the chat status changes to inactive, and the user is unable to send or receive messages through WhatsApp for that contact. The contact will be informed that the user has left the conversation and will not receive further messages. This procedure also applies to WeChat and LINE.



If the MultiLine user wishes to resume communication, they must complete the Opt-In process to establish a new connection with the contact, thereby reactivating the existing conversation.

 **Beth Davies** All **WhatsApp** WeChat Voicemails 3 more ▾

11:15 AM

Thank you for the information. Let me check that for you. It appears there was an error in processing. I'll initiate a refund for the incorrect amount immediately ✓

Beth Davies 11:16 AM

 Thank you so much, Emily!
I really appreciate your prompt assistance.

11:17 AM

You're welcome! Customer satisfaction is our top priority. Is there anything else I can assist you with today? ✓

Beth Davies 11:18 AM

 No, that's all for now. Thanks again for your help!

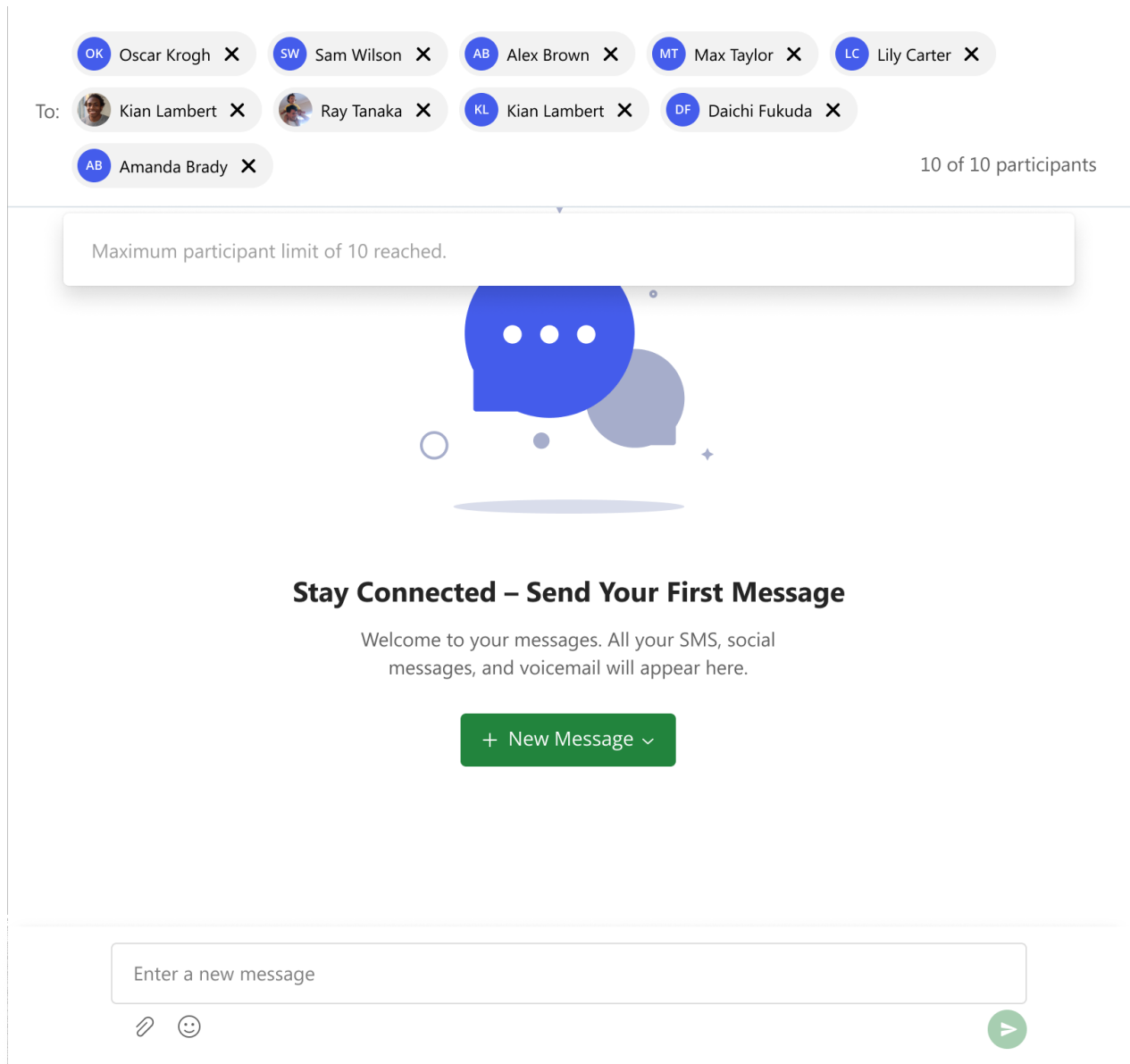
 You left this conversation on October 1 at 12:14 AM.

New conversation ⓘ

 You've sent the contact an opt-in request. You can send up to 5 messages, and we'll deliver them as soon as the request is accepted.

Group Messaging - SMS

- When sending SMS, users can select up to 11 participants including themselves.
- MultiLine users can mute group messages to limit notifications.
- Users can delete or add participants, and this action will create a new group message.



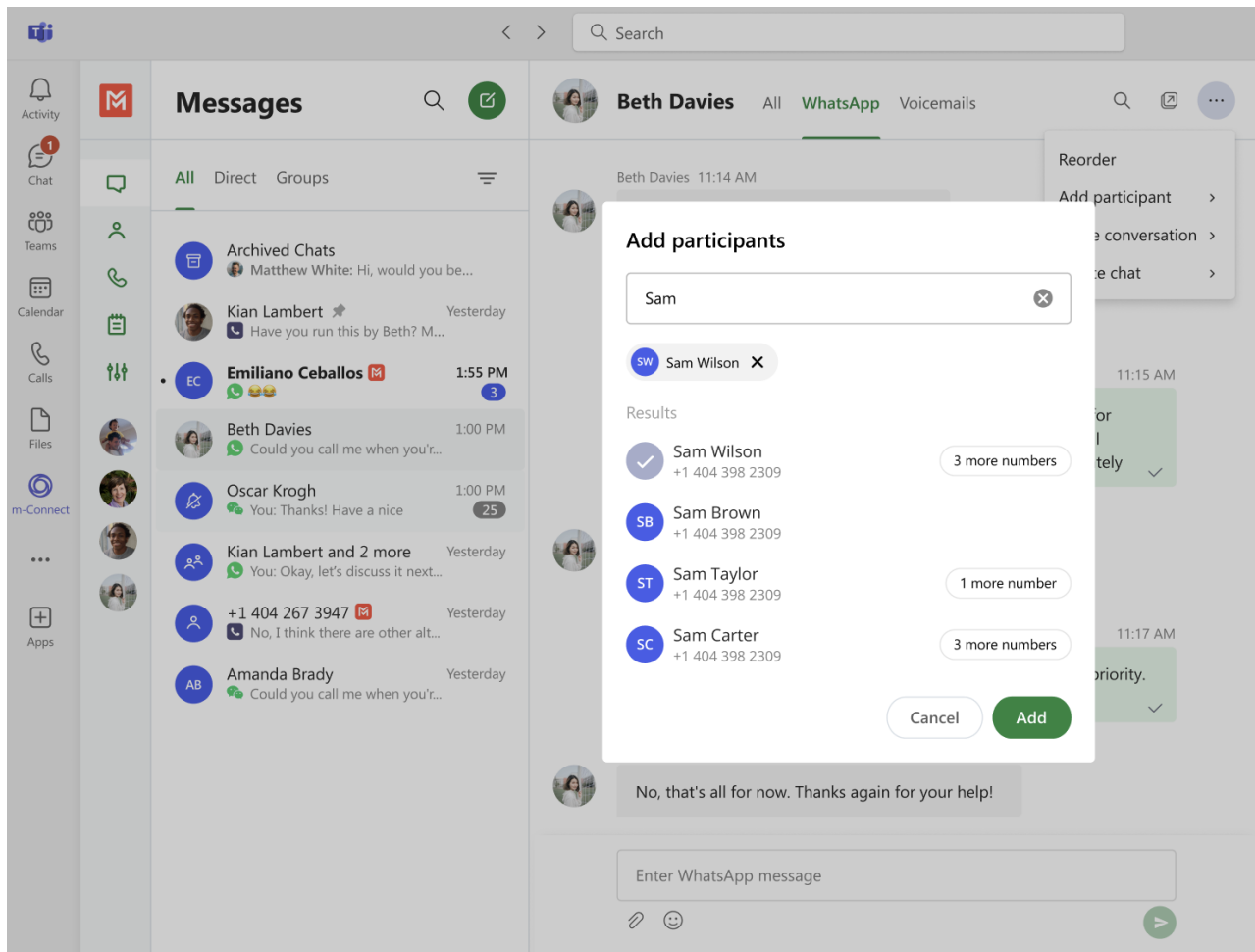
Group Messaging - Social

Social Group Messaging has some differences compared to SMS.

- Group messaging allows a MultiLine user to add up to 10 MultiLine users and a single WhatsApp user to a conversation.
- MultiLine users can add or remove participants.
- You can transfer the user to another MultiLine user in the group conversation by leaving the conversation with that user, remove the participant, or restart a conversation with that user.
- MultiLine users can have multiple group conversations with a single WhatsApp user.
- WhatsApp groups support up to 10 participants, each having the option to leave the conversation as needed.
- New participants in the group conversation may access the conversation history if it has been

shared with them.

Group conversations can be easily created by clicking on 'Add Participants' option on message header and adding participants on the conversation window.



WhatsApp Read and Delivery Status

MultiLine users can check the status of messages sent to WhatsApp users. The following statuses are available:

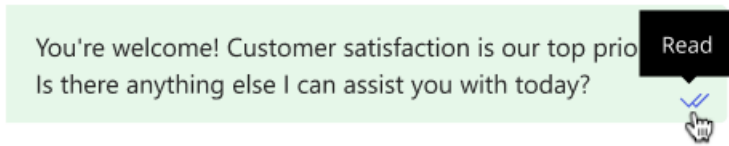
Sent - Messages display a single check mark when they have been sent by Movius to WhatsApp but have not yet been delivered to the WhatsApp user.

You're welcome! Customer satisfaction is our top priority.
Is there anything else I can assist you with today? ✓

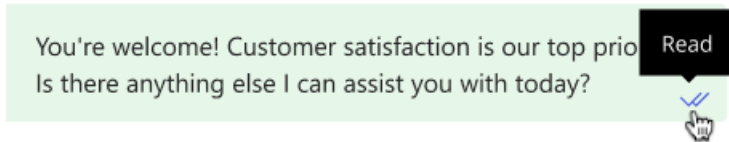
Delivered - Messages display double check marks when they have been delivered to the WhatsApp user, though the message has not been read.

You're welcome! Customer satisfaction is our top priority.
Is there anything else I can assist you with today? ✓

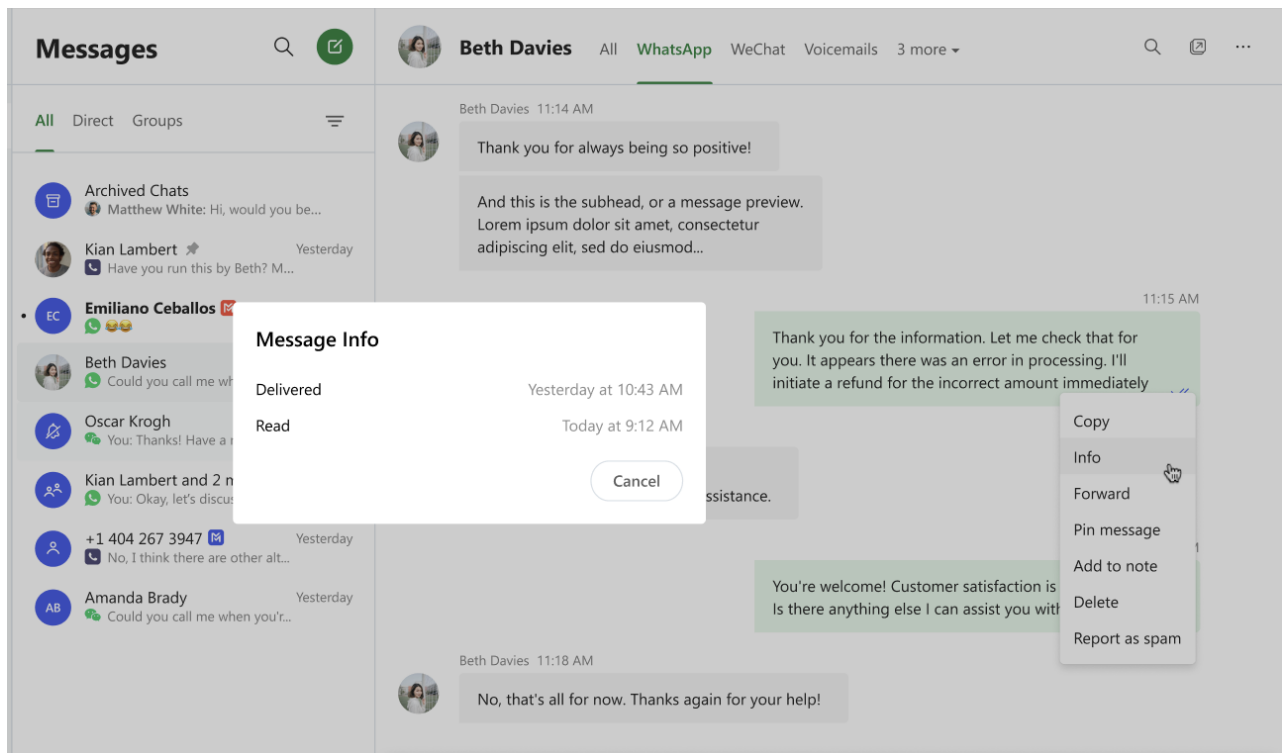
Read - Messages display blue double check marks when they have been read by the WhatsApp user.



Failed - These messages were not delivered to the WhatsApp user, as Meta declined delivery.



MultiLine users can also view the date and time a message was delivered or read by selecting the Info option on the message.



WeChat Messages

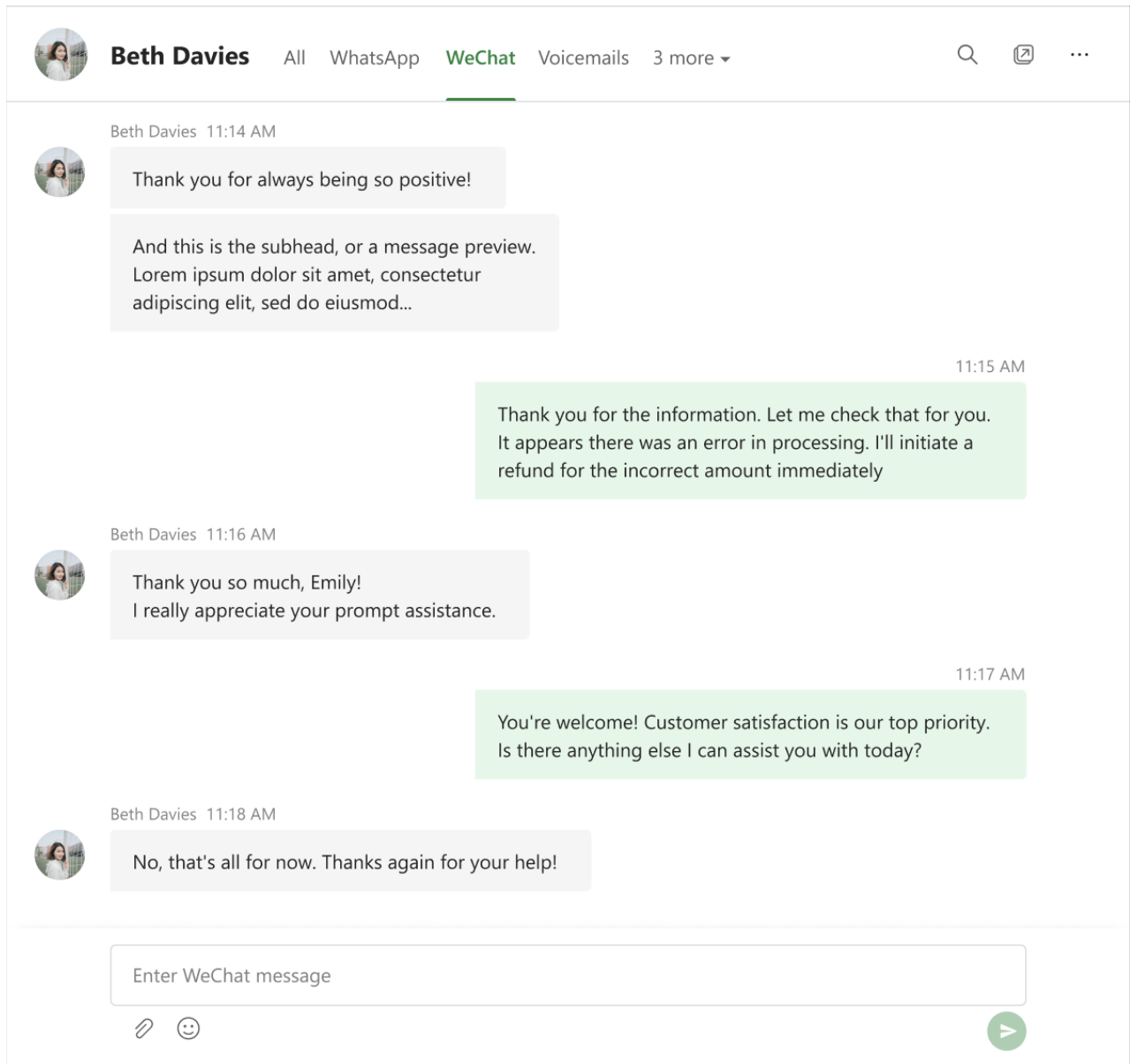
Integration with WeChat enables WeChat users to initiate conversations with MultiLine users, facilitating seamless communication between platforms. However, MultiLine users are unable to initiate conversations with WeChat users.

Here is a step-by-step procedure for WeChat user to initiate conversation with MultiLine users.

1. WeChat users must scan a barcode within the WeChat application to initiate a conversation with a MultiLine user.
2. Upon scanning the barcode, a new conversation thread will be initiated with the business

account. WeChat users will then need to provide their phone number and OTP sent to the phone number for verification purposes.

3. Subsequently, WeChat users will be prompted to enter the phone number or email address of the representative they wish to engage with.
4. If the WeChat user provides an incorrect phone number or email address, they will not be connected to the MultiLine user.



Line Messages

Integration with Line enables Line users to initiate conversations with MultiLine users, facilitating seamless communication between platforms. However, MultiLine users are unable to initiate conversations with Line users.

Here is a step-by-step procedure for Line user to initiate conversation with MultiLine users.

1. Line users must scan a barcode within the Line application to initiate a conversation with a

MultiLine user.

2. Upon scanning the barcode, a new conversation thread will be initiated with the business account. Line users will then need to provide their phone number and OTP sent to the phone number for verification purposes.
3. Subsequently, Line users will be prompted to enter the phone number or email address of the representative they wish to engage with.
4. If the Line user provides an incorrect phone number or email address, they will not be connected to the MultiLine user.

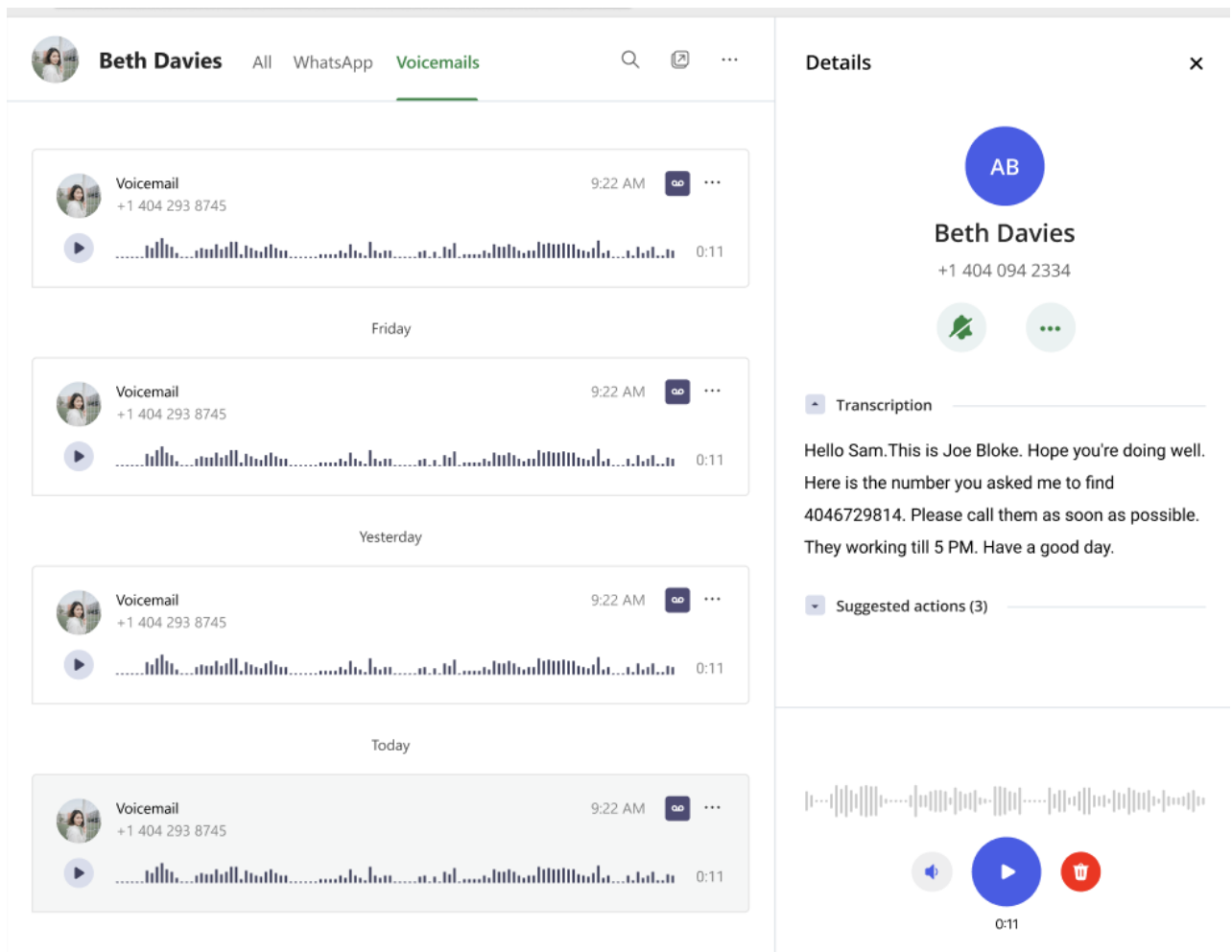
Voice-mails

MultiLine voicemails will appear within the message window when a contact has sent a voicemail.

The Voicemail tab does not support message composition; therefore, the compose field will not be available in this section.

Selecting the play button on a voicemail will automatically launch the fourth panel and begin playback of the voicemail.

Voice-mails cannot be deleted manually; however, they will be removed from your inbox according to your organization's pre-configured retention period.



Beth Davies All WhatsApp **Voice-mails** 🔍 📎 ⋮

Voice-mail 9:22 AM 📎 ⋮
+1 404 293 8745
0:11

Friday

Voice-mail 9:22 AM 📎 ⋮
+1 404 293 8745
0:11

Yesterday

Voice-mail 9:22 AM 📎 ⋮
+1 404 293 8745
0:11

Today

Voice-mail 9:22 AM 📎 ⋮
+1 404 293 8745
0:11

Details ✕

Beth Davies
+1 404 094 2334

📌 ⋮

Transcription

Hello Sam. This is Joe Bloke. Hope you're doing well. Here is the number you asked me to find 4046729814. Please call them as soon as possible. They working till 5 PM. Have a good day.

Suggested actions (3)

0:11

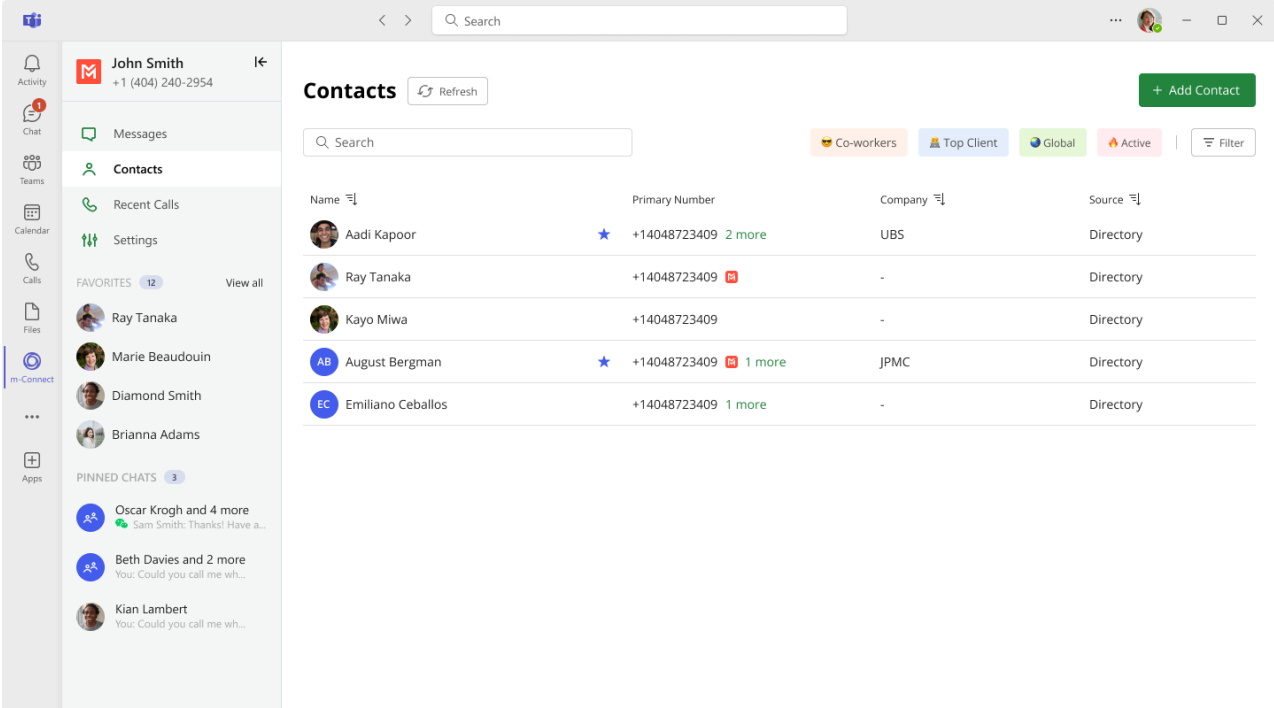
Contacts Management

The **Contacts** section in m-Connect is fully integrated with Outlook. You can view, search, add, edit, tag, favorite, and manage your contacts directly within the app.

Contact Landing Page

When you open the **Contacts** tab, your Outlook contacts are displayed in a table view with the following six columns:

1. **Name** - Displays the contact's first and last name. Contacts can be sorted based on names.
2. **Favorites** - Shows if the contact is marked as favorite.
3. **Primary Number** - Displays the business number as the primary number and also lists the secondary numbers next to it.
4. **Company** - The company associated with the contact. Contacts can be sorted based on Company name.
5. **Source** - Always "Outlook" for Outlook contacts.
6. **Actions** - Available when you hover over a contact.



The screenshot shows the m-Connect app interface. On the left is a sidebar with navigation icons for Activity, Chat, Messages, Contacts, Recent Calls, and Settings. The main content area is titled 'Contacts' and features a search bar, a 'Refresh' button, and filter tags for Co-workers, Top Client, Global, and Active. Below these is a table of contacts with columns: Name, Primary Number, Company, and Source. The contacts listed are Aadi Kapoor, Ray Tanaka, Kayo Miwa, August Bergman, and Emiliano Ceballos. A '+ Add Contact' button is in the top right corner.

Name	Primary Number	Company	Source
Aadi Kapoor	+14048723409 2 more	UBS	Directory
Ray Tanaka	+14048723409	-	Directory
Kayo Miwa	+14048723409	-	Directory
August Bergman	+14048723409 1 more	JPMC	Directory
Emiliano Ceballos	+14048723409 1 more	-	Directory

Actions Available

When hovering over a contact, you can:

- **Edit** - Modify the contact's details (Outlook contacts only).
- **Add to Favorite** - Mark the contact as a favorite.

- **Add Tag** - Assign a tag (category) to the contact.
- **Send Message** - Start a conversation with the contact.
- **Delete** - Remove the contact (Outlook contacts only).

Contacts

Refresh

+ Add Contact

Co-workers

Top Client

Global

Active

Filter

Name	Primary Number	Company	Source	
Aadi Kapoor	★ +14048723409 2 more	UBS	Directory	Edit Add to favorite Add tag Send message Delete
Ray Tanaka	+14048723409	-	Directory	
Kayo Miwa	+14048723409	-	Directory	
August Bergman	★ +14048723409 1 more	JPMC	Directory	
Emiliano Ceballos	+14048723409 1 more	-	Directory	

Searching Contacts

- **Outlook Search** - Finds contacts stored in Outlook.

Contacts

Refresh

+ Add Contact

Co-workers

Top Client

Global

Active

Filter

Contacts

Directory

Sam Wilson
+1 404 398 2309

Alex Brown
2 numbers

Max Taylor
3 numbers

Lily Carter
+1 404 398 2309

Kian Lambert
2 numbers

See all results

Primary Number	Company	Source
+14048723409 2 more	UBS	Directory
+14048723409	-	Directory
+14048723409	-	Directory
+14048723409 1 more	JPMC	Directory
+14048723409 1 more	-	Directory

- **Directory Search (Active Directory)** - Finds colleagues from your company directory.
 - From AD results, you can:
 - **Add to Contacts** - Save the AD contact into Outlook.
 - **Send Message** - Start a conversation directly.
 - **Add to Favorite** - Mark as favorite.

- **Note:** AD contacts cannot be deleted.

Contacts

Refresh

+ Add Contact

Q Sam|

Co-workers

Top Client

Global

Active

Filter

Contacts

Directory

SW

Sam Wilson

+1 404 398 2309

AB

Alex Brown

2 numbers

MT

Max Taylor

3 numbers

LC

Lily Carter

+1 404 398 2309

LC

Kian Lambert

2 numbers

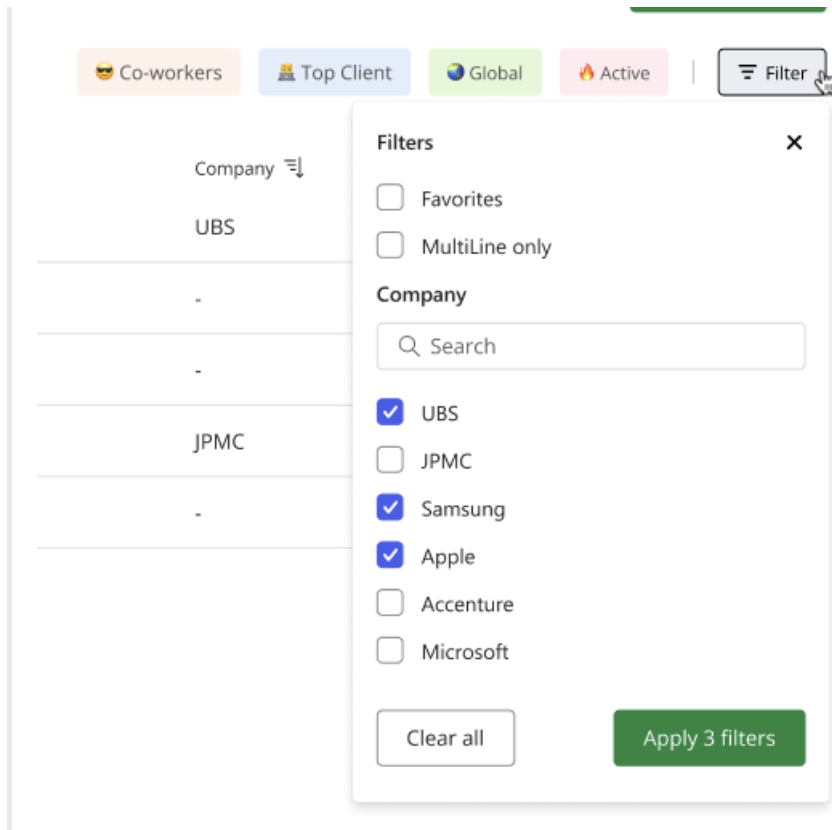
See all results

Primary Number	Company	Source
+14048723409 2 more	UBS	Directory
+14048723409	-	Directory
+14048723409	-	Directory
+14048723409 1 more	JPMC	Directory
+14048723409 1 more	-	Directory

Filters

You can filter contacts on the page using:

- **Tags**
- **Favorites**
- **MultiLine Contacts**
- **Company**



Adding or Updating a Contact

When creating or updating a contact, the following fields are available:

Mandatory Fields

- First Name
- Last Name
- Type (Business, Mobile, Home)
- Phone Number

Optional Fields

- Email
- Company
- Tag
- Notes
- Photo

Activity

Chat

Teams

Calendar

Calls

Files

m-Connect

...

Apps

John Smith

+1 (404) 240-2954

Messages

Contacts

Recent Calls

Settings

FAVORITES 12

View all

Ray Tanaka

Marie Beaudouin

Diamond Smith

Brianna Adams

PINNED CHATS 3

Oscar Krogh and 4 more

Sam Smith: Thanks! Have a...

Beth Davies and 2 more

You: Could you call me wh...

Kian Lambert

You: Could you call me wh...

New contact

User avatar

Min. 64x64 px. File format: .png, .jpg under 10 Mb

Personal data

First name*

Enter

Last name*

Enter

To save the contact please enter Last name here

Phone number*

Enter

Type*

Business phone

Add more number

Other information

Email

Enter

Type

Business

Add more email

Company

Enter

Role

Enter

Tag

Search

Add new tag

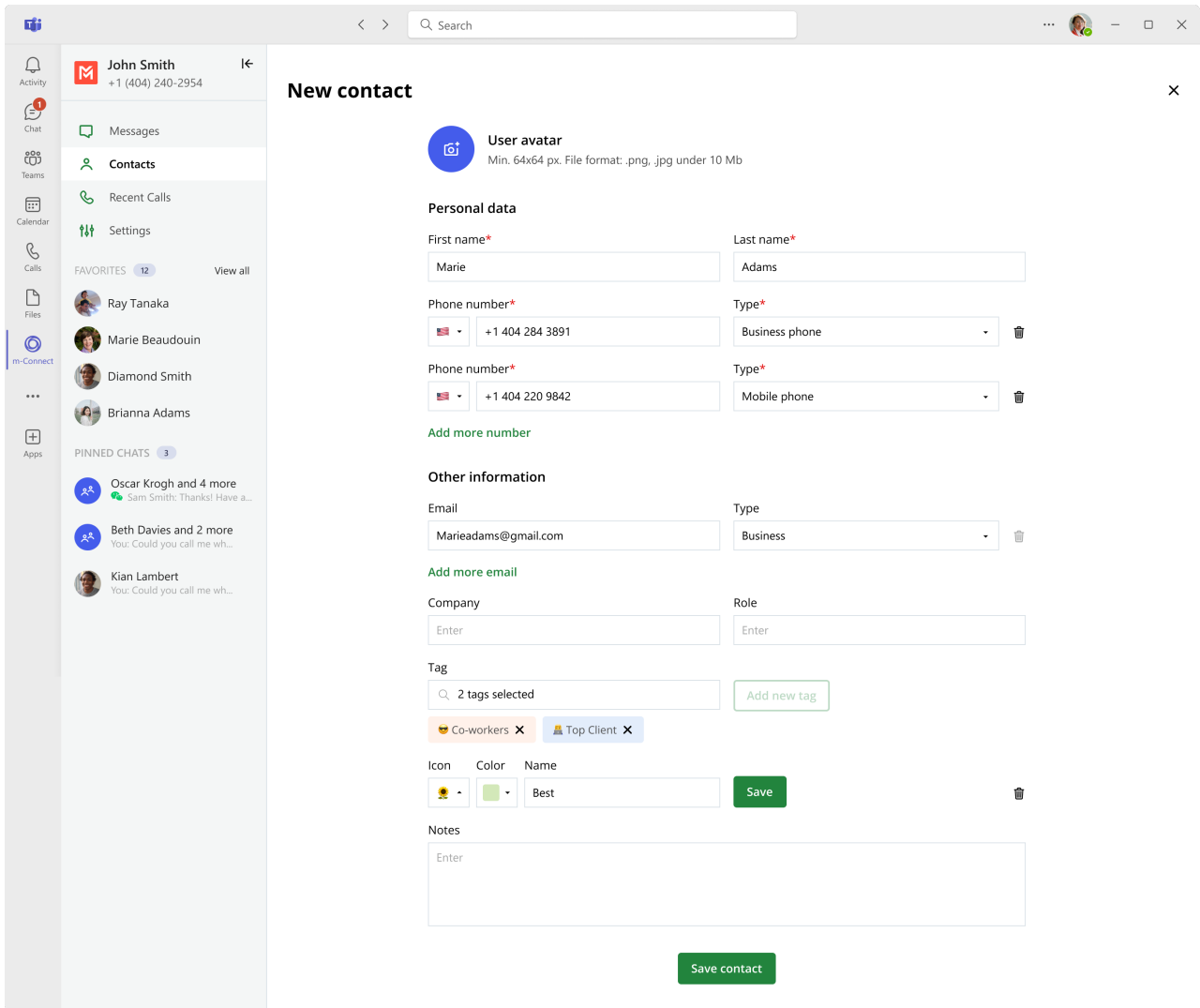
Notes

Enter

Save contact

Tagging Contacts

- Tags in m-Connect work the same as Outlook Categories.
- You can create **new tags** by specifying a **name** and **color**.



New contact

User avatar
Min. 64x64 px. File format: .png, .jpg under 10 Mb

Personal data

First name*
Marie

Last name*
Adams

Phone number*
+1 404 284 3891

Type*
Business phone

Phone number*
+1 404 220 9842

Type*
Mobile phone

[Add more number](#)

Other information

Email
Marieadams@gmail.com

Type
Business

[Add more email](#)

Company
Enter

Role
Enter

Tag
2 tags selected
Co-workers X Top Client X

Icon
Color
Name
Best

[Save](#)

Notes
Enter

[Save contact](#)

Contact Details Panel (4th Panel)

Selecting a contact opens the **details view** in the fourth panel. This panel displays:

- **Contact Name**
- **Primary Number**
- **Start Conversation** button
- **Search in Conversation** option
- **Mute Contact** option
- **More Options** menu:
 - Edit Contact (Outlook contacts only)
 - Add to Favorite
 - Delete Contact (Outlook contacts only)

Tabs in Details Panel

- **Overview** - General information and contact details.
- **Pinned** - Displays pinned conversations with this contact (if any).
- **Groups** - Displays group conversations that include this contact (if any).
- **Notes** - Personal notes about the contact.

Details



Aadi Kapoor

+1 404 872 3409



Overview



Company

UBS



Mobile

+1 404 872 3409

Home

+1 404 891 0112

Office

+1 404 332 8929



Email

Alex.Brown@jpmc.com

 Tags Co-workers Top Client Pinned Messages Groups Notes

Recent Calls/Voicemail

The **Recent Calls** tab helps you view and manage your call history. The content of this tab changes depending on whether Teams Calling is enabled for your account.

- If Teams Calling is enabled → Tab is labelled Recent Calls.
- If Teams Calling is not enabled → Tab is labelled Voicemails.

Landing Page

On the landing page, you will see:

- A tag option on the top right.
- Five sub-tabs:
 1. All Calls
 2. Incoming Calls
 3. Outgoing Calls
 4. Missed Calls
 5. Voicemails

Recent Calls

All Calls Incoming Outgoing Missed Voicemails

Q Search

9 Tags

Name	Type	Sentiment	Duration	Date	Source
 Aadi Kapoor +1 404 398 2309	Incoming	Positive	1m 15s	Yesterday	Mobile
 Alex Brown +1 404 094 2334	Voicemail	Neutral	3m 48s	Monday	Mobile
 Sam Adams +1 460 498 8796	Outgoing	Positive	1m 13s	Sunday	Mobile

Each sub-tab displays your calls in a table format with the following five columns:

1. Name - **Caller's name if saved as a contact, otherwise the phone number.**
2. Type - **Indicates whether the call was Incoming, Outgoing, or Missed.**
3. Duration - **Length of the call.**
4. Date & Time - **Displays in Month Date, Year format (e.g., Sep 15, 2025). The time zone and time format follow your system settings.**
5. Source - **Identifies where the call originated:**
 - Mobile - **Calls made from the MultiLine mobile app.**
 - Others - **Calls from all other sources.**

Recent Calls

All Incoming Outgoing Missed

Additional features on the landing page:

- Search - **Allows you to search contacts associated with calls.**

Recent Calls

All Calls Incoming Outgoing Missed Voicemails

✕

D N
Co-workers
Top Client
Global

Name	Type	Sentiment	Duration	Date	Source
 Aadi Kapoor +1 404 398 2309 	 Incoming	 Positive	1m 15s	Yesterday	Mobile

- **Pagination** - Each page displays 10 records by default. You can expand to show 25, 50, or 100 records.

Previous **1** 2 3 4 5 ... 999 Next

Rows per page 10 ▾

Call Details Panel (4th Panel)

Clicking on a call record opens the Call Details view in the right-hand (4th) panel.

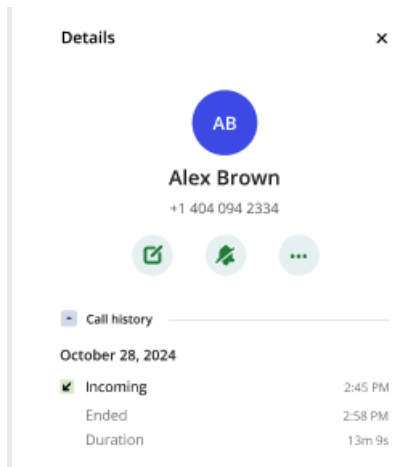
- **Caller Name and Number** - Displays saved contact name with number, or "Unsaved Number" if not in your contacts.
- **Start Conversation** - Begin a new conversation with the caller.
- **Mute** - Available only for saved contacts to mute notifications.
- **More Options (⋮)** - Options differ based on whether the number is saved:
 - For Unsaved Numbers:
 - **Add to Contacts**
 - **Add to Existing Contact**
 - For Saved Contacts:
 - **Edit Contact**
 - **Add Tag**
 - **Add Favorite**
 - **Delete Contact**

Call History Section

Shows the call log with this contact, including:

- Date & time of each call

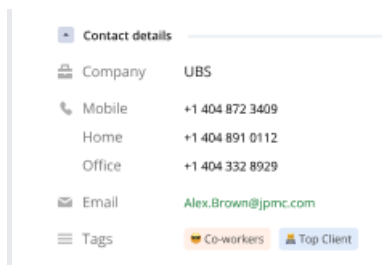
- Whether the call ended or was missed
- Duration of each call



Contact Details Section

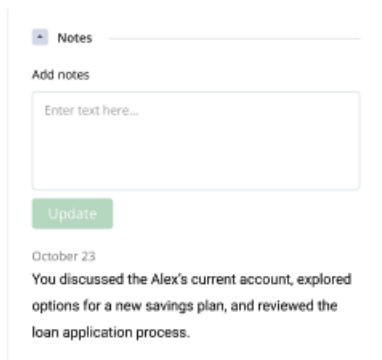
Displays additional information about the contact (if saved):

- Company
- Phone numbers
- Email addresses



Notes Section

Contains any notes recorded for this contact.



Voicemail

The Voicemails tab is displayed if Teams Calling is not enabled for your account. In this mode, the landing page shows a list of voicemail records with the same layout and columns used in Recent Calls:

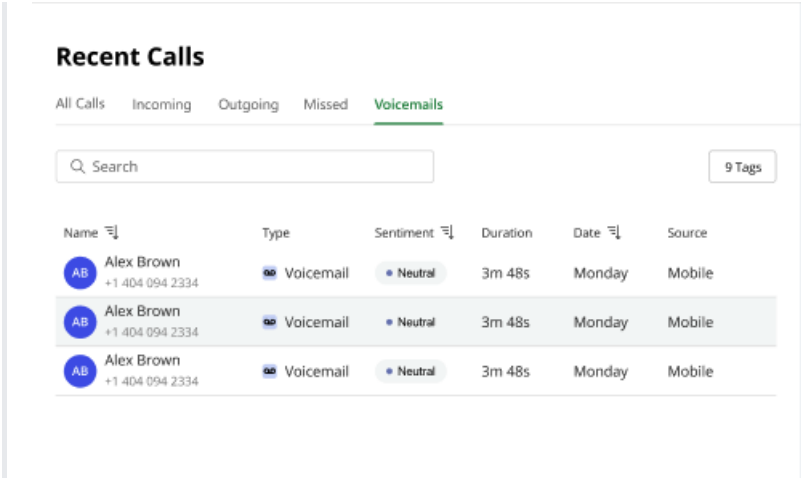
Name - Contact name if saved, otherwise phone number.

Type - Always marked as Voicemail.

Duration - Length of the voicemail recording.

Date & Time - In Month Date, Year format (timezone and time format follow system settings).

Source - Shows the origin of the voicemail (e.g., Mobile for voicemails from the MultiLine mobile app, Others for all else).



Recent Calls					
All Calls	Incoming	Outgoing	Missed	Voicemails	
Q Search					
9 Tags					
Name	Type	Sentiment	Duration	Date	Source
 Alex Brown +1 404 094 2334	 Voicemail	 Neutral	3m 48s	Monday	Mobile
 Alex Brown +1 404 094 2334	 Voicemail	 Neutral	3m 48s	Monday	Mobile
 Alex Brown +1 404 094 2334	 Voicemail	 Neutral	3m 48s	Monday	Mobile

Voicemail Details Panel (4th Panel)

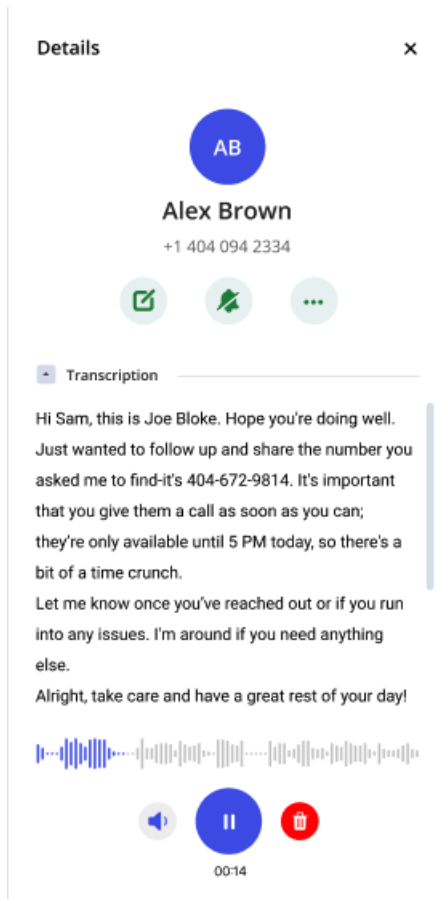
Clicking on a voicemail record opens the Voicemail Details view in the 4th panel.

Voicemail Playback

The voicemail recording is available with standard playback controls (play, pause, seek, volume).

Transcription (Optional)

If the Voicemail Transcription feature is enabled for your account, the panel will display a text transcription of the voicemail message beneath the audio player.



Contact Actions

Contacts accessed via 4th panel will display different actions for saved and unsaved numbers.

Saved Contact will display:

- Start conversation
- Mute notifications
- More Options (Edit Contact, Add Tag, Add Favorite, Delete Contact).

Unsaved Numbers will display:

- Start conversation
- More Options includes Add to Contacts or Add to Existing Contact.

Retention

- Voicemails cannot be manually deleted.
- They are automatically removed from the UI after the pre-defined retention period set by your organization's policy.

Settings

The **Settings** section allows you to personalize your experience, configure how contacts are displayed, and access important information about the app. Settings are divided into four sub-sections: **Appearance**, **Contact Settings**, **General**, and **Help**.

Appearance

Customize how m-Connect looks on your device:

- **Theme** - Choose between:
 - **Light** - Bright background with dark text.
 - **Dark** - Dark background with light text.
 - **System Default** - Follows your operating system's theme preference.

Appearance

Switch to old m-Connect
Turn on if you want switch to m-Connect 2.0 version

Off 

Theme
This will apply to al your MultiLine apps

Light ▼

Contact Settings

Control how contacts are displayed and sorted:

- **Sorting Order** - Sort contacts by **First Name** or **Last Name**.
- **Display Order** - Choose how names are shown:
 - **First Name Last Name** (e.g., John Smith)
 - **Last Name, First Name** (e.g., Smith, John)



Contact settings

Sync Interval

Every 4 Hours

Sort contacts by

☐

First Name

Contacts will be sorted by first name

☒

Last Name

Contacts will be sorted by last name

Display order

☐

First Name, Last Name

☒

Last Name, First Name

General

General settings and app information:

- **Location** - Required for **E911 emergency services**. Users must provide their location details here.
- **Client Version** - Displays the version of the m-Connect app currently installed.
- **Terms & Privacy Policies** - Links to the organization's terms of service and privacy policy documents.



General

E911

This address is given to dispatchers when you call 911 using Wi-Fi. It's necessary to help first responders find you if you're unable to tell them where you are.

Please note that location should be enabled while dialing or messaging 911

1501 10th St Plano TX 75074 US

Update

To Review the E911 Terms & Conditions [Click Here](#)

About m-Connect

You have m-Connect published version **1.0.7**.

The client version is **3.0.0**

Terms & Privacy Policy

To Review Terms & Privacy Policy [Click Here](#)

Help

Access support information:

- **Phone Number** - Contact number for support.
- **Email Address** - Email support contact.
- **Knowledge Base URL** - Link to the online knowledge base for FAQs and troubleshooting.

Help

Call Us

[17702831000](tel:17702831000)

Email

Help@MoviusCorp.com

Knowledge base

[Help.moviuscorp.com](https://help.moviuscorp.com)

Bulk Messaging

Bulk Messaging allows m-Connect users to deliver a message to several recipients simultaneously. Messages can be sent in bulk via WhatsApp using the desktop or mobile Teams application.

Pre-Requisites

1. The Bulk Messaging feature must be enabled for both the organization and user from the Movius Management Portal.
2. WhatsApp social messaging must be enabled for the organization and user.
3. Picture messages on WhatsApp must be enabled for the organization and user.

Overview

1. m-Connect uses Outlook-synced distribution lists to send messages.
2. Lists with at least 100 contacts qualify for bulk messaging.
3. Bulk Messages support both text and images.
4. Formatting options include bold, italics, and more.
5. Messages can be scheduled ahead of time.
6. Scheduled messages can be edited or deleted before they're sent.
7. Each message has individual status tracking.
8. Bulk messages appear in existing WhatsApp chats or create new ones if none exist.
9. Thread order isn't affected; new threads remain hidden unless replied to or messaged again.
10. Sent messages sync with MultiLine mobile and Movius apps.

11. Distribution Lists are synced from Outlook and shown in Contacts.
12. You can create distribution lists on Contacts tab; they're saved to Outlook.

Composing Bulk Messages

1. To send a message, go to the MultiLine Messaging app.

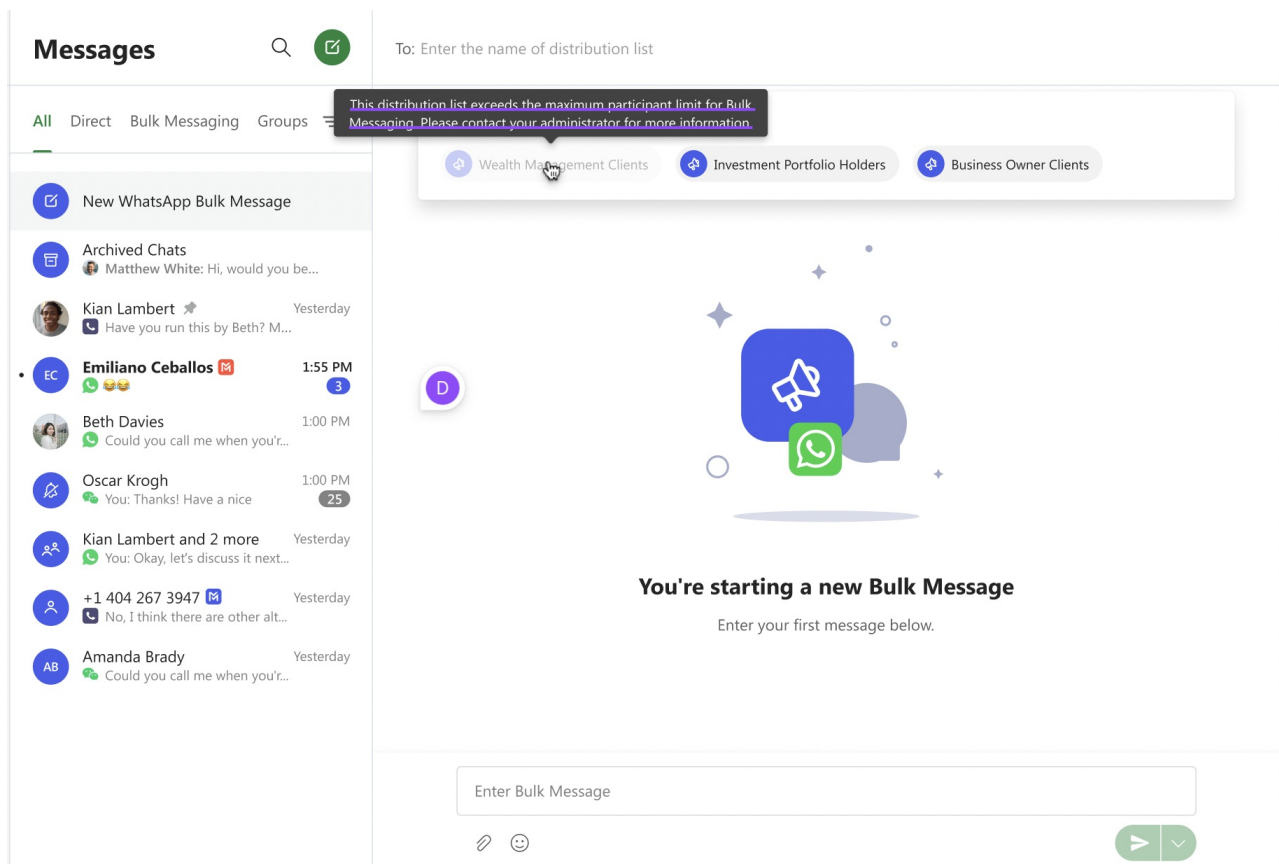


2. Click the



Start Conversation icon.

3. Select Bulk Message option from drop down.
4. Select a distribution list to send a bulk message. The distribution list is unavailable for selection if it exceeds the maximum recipient limit for sending messages.

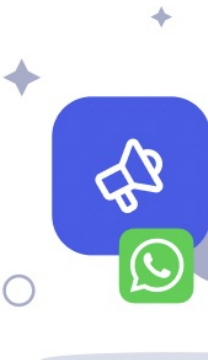


The screenshot shows the MultiLine Messaging app interface. At the top, there's a search bar and a 'To: Enter the name of distribution list' field. Below this, a dropdown menu is open, showing three options: 'Wealth Management Clients', 'Investment Portfolio Holders', and 'Business Owner Clients'. A tooltip message is displayed over the dropdown, stating: 'This distribution list exceeds the maximum participant limit for Bulk Messaging. Please contact your administrator for more information.' The main area of the app shows a list of messages on the left and a large central area with the text 'You're starting a new Bulk Message' and 'Enter your first message below.' At the bottom, there's a text input field labeled 'Enter Bulk Message' and a green button with a play icon and a dropdown arrow.

5. Contacts in the distribution list that do not have a phone number will be highlighted, and those missing numbers will be flagged for updates.

To:  Investment Portfolio Holders ...

 A participant is missing a contact number



You're starting a new
Enter your first message

Enter Bulk Message

Details 



Investment Portfolio Holders
15 Participants

 Participants

Search for a person

 Alex Brown
+1 404 398 2309

3 more numbers ...

 Max Taylor

 Contact number missing ...

 Lily Carter

 Contact number missing ...

 Emiliano Ceballos
+1 404 398 2309

...

 August Bergman
+1 404 398 2309

...

 Kenneth Jacobs
+1 404 398 2309

...

 Kayo Miwa

...

6. Type your message or choose a picture in the compose field to send to the distribution list.
Use contact name variable to address user by their name.

To:  Investment Portfolio Holders ...



B *I* U | :≡ 1/3 | ⇄ {8} | ...



 Img name.png X

Hi {{contact_name}} 🌟
I hope you're doing well! I wanted to touch base with you about your wealth management strategies.
If you have any questions or would like to review your portfolio, I'm here to help.
Let's ensure your financial goals are on track! Feel free to reach out anytime or let me know if you'd like to schedule a chat.



Scheduling Bulk Messages

To schedule a message, compose your message and select the dropdown next to the send button.

B *I* U | :≡ 1/3 | ⇄ {8} | ...



Hi {{contact_name}} 🌟
I hope you're doing well! I wanted to touch base with you about your wealth management strategies.
If you have any questions or would like to review your portfolio, I'm here to help.
Let's ensure your financial goals are on track! Feel free to reach out anytime or let me know if you'd like to schedule a chat.



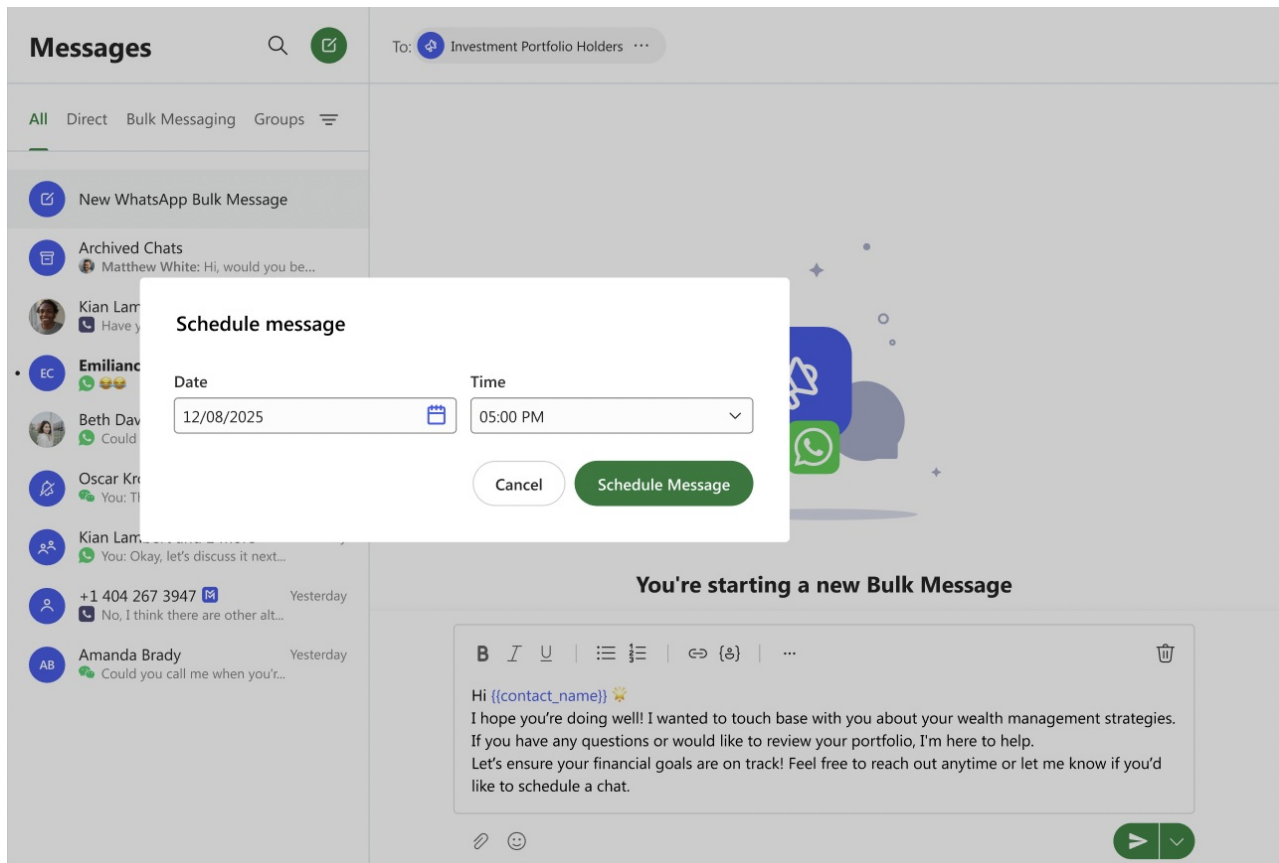
Schedule message

☒ Send on Enter ↵

☐ Disable send on Enter ↵



Select Date & Time and click on 'Schedule Message' on the pop up.



Scheduled messages appear as gray bubbles in the conversation thread and can be edited by hovering over them. Date & Time of Schedule will be displayed over message.

 **Investment Portfolio Holders**
15 participants

Today

 Schedule





Hi {{contact_name}} 🌟
I hope you're doing well! I wanted to touch base with you about your wealth management strategies. If you have any questions or would like to review your portfolio, I'm here to help. Let's ensure your financial goals are on track! Feel free to reach out anytime or let me know if you'd like to schedule a chat.

Info

Pin

Save message

Edit schedule

Send immediately

Edit message

Delete

At the designated delivery time, status 'Sending message...' will appear above messages.

Today

Sending message...

Hi {{contact_name}} 🌟
I hope you're doing well! I wanted to touch base with you about your wealth management strategies. If you have any questions or would like to review your portfolio, I'm here to help. Let's ensure your financial goals are on track! Feel free to reach out anytime or let me know if you'd like to schedule a chat.

Enter Bulk Message

When all messages have been processed, the status updates to Sent, and a single tick appears on the message bubble.

Today

Sending message...

Hi {{contact_name}} 🌟
I hope you're doing well! I wanted to touch base with you about your wealth management strategies. If you have any questions or would like to review your portfolio, I'm here to help. Let's ensure your financial goals are on track! Feel free to reach out anytime or let me know if you'd like to schedule a chat.



Enter Bulk Message



A red information icon will appear next to the sent status if certain messages fail to deliver.

Today

You 12:43 PM

Hi {{contact_name}} 🌟
I hope you're doing well! I wanted to touch base with you about your wealth management strategies. If you have any questions or would like to review your portfolio, I'm here to help. Let's ensure your financial goals are on track! Feel free to reach out anytime or let me know if you'd like to schedule a chat.



Delivery failed for some participants



Status Tracking

Click on 'Info' icon on sent messages.

Today

Info
Pin
Save message

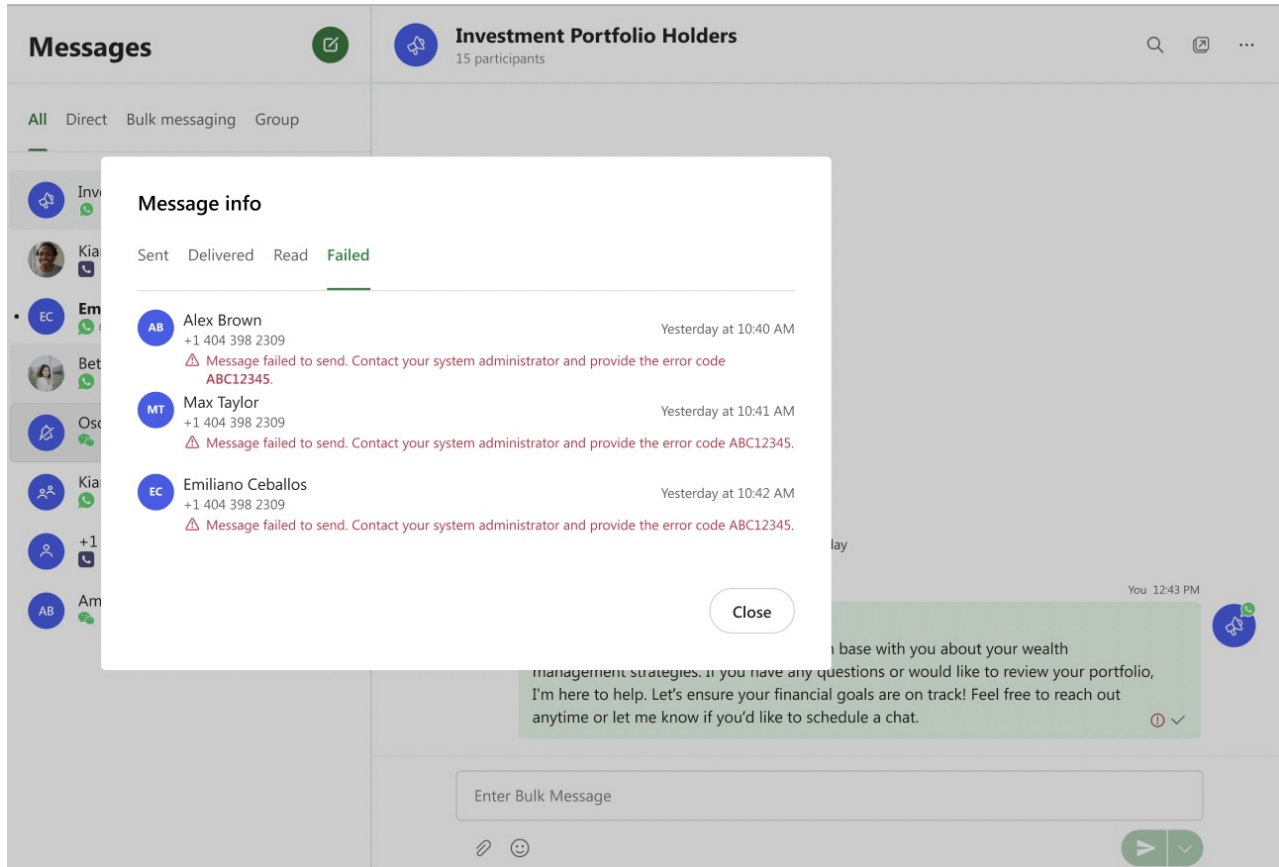
Hi {{contact_name}} 🌟
I hope you're doing well! I wanted to touch base with you about your wealth management strategies. If you have any questions or would like to review your portfolio, I'm here to help. Let's ensure your financial goals are on track! Feel free to reach out anytime or let me know if you'd like to schedule a chat.



The delivery status for each message will be shown in a pop-up window.

- Delivery pending
- Send

- Delivered
- Read
- Failed



Distribution List Management

The Distribution List will be synchronized from Outlook, it can be updated or deleted from Outlook and will be synchronized with m-Connect app.

Users can create new distribution list from Contacts tab in Outlook.

Distribution List tab will display the Name, Number of Participants and Source of DL.

Contacts

 Refresh

+ Add

All Contacts

Distribution list

 Search

Name 	Number of participants	Source 
 Investment Portfolio Holders	13	
 Wealth Management Clients	140	
 Business Owner Clients	48	

Details

✕



Savings and Investment Clients

4 Participants



▲ Participants

Search for a person

- EC

Ray Tanaka
+1 404 398 2309

3 more numbers

...
- EC

Marie Beau
+1 470 981 0

Mobile: +1 404 398 2309 

...
- EC

Diamond S
+1 404 771 9

Office: +1 404 891 0112

...
- EC

Brianna Ad
+1 404 122 3343

Home: +1 404 332 8929

...

▼ Pinned messages

▼ Notes

- Clicking on a distribution list on contact page will open Details on 4th panel.

- DL name and count of participants will be displayed in 4th panel.
- Start conversation will direct user to Bulk Message compose screen, if conversation already exists user will be directed to existing thread.
- Clicking on Search will direct user to Bulk Message conversation search in 4th panel.
- User can switch the numbers on a contact if they have multiple numbers in a contact.
- User can search the participants of the DL by name.
- Pinned messages section will display the messages that were pinned on bulk message thread.
- Utilize Notes section to document any information about the DL or contacts.

Multiline Calling in Microsoft Teams

The MultiLine voice integration allows for making and receiving calls with a MultiLine number directly within Microsoft Teams.

Features

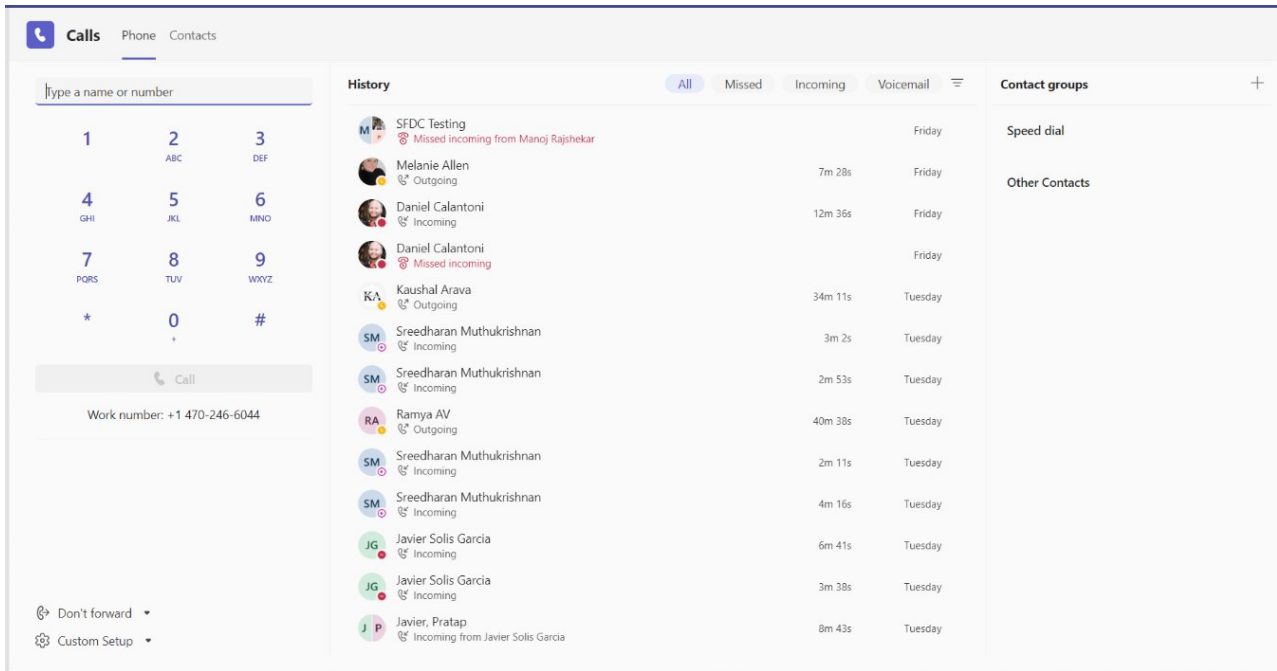
Let's look at voice capabilities with Multiline integrated into Microsoft Teams.

Overview

- Integration with Teams Calling Features: Multiline leverages Teams calling capabilities, seamlessly integrating with the native dialer in Microsoft Teams. Users can search for contacts in Exchange by name to initiate calls, including the ability to dial unsaved numbers.
- Assigned MultiLine Work Numbers: The work number is displayed on the Teams dialer page, ensuring clear identification and accessibility for users.
- Calling Options: Users have the flexibility to make calls to both external numbers and internal users within the organization, facilitating comprehensive communication capabilities.
- Voicemail Forwarding: Users can easily forward calls to voicemail by adjusting the default settings directly from the dialer screen. (make sure we are providing instructions for MultiLine voicemail, not Teams voicemail)

Calling

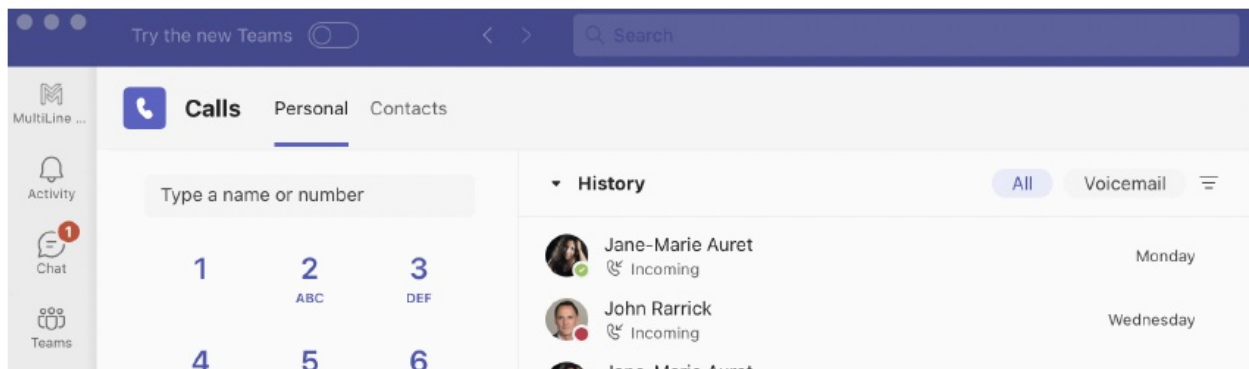
First, users go to the usual calling app in Teams. The interface is familiar, however, when MultiLine is enabled, the Work number will display below the dialer.



As the user types a name or number into the field above the dialer, after 3 characters, matching contacts will start to be displayed.

Voicemail

To listen to voicemail, select **Voicemail** from the **History** menu.



Select the log to access the **Details** panel, and then the **Play** icon to listen to the message.

AllVoicemail

...

Call

7/14/22

Details

JG

Javier Solis Garcia

Head of Products

3125 - CTO Design - ROW

Send a quick message

Voicemail

Voicemail transcript is unavailable because the audio quality was not clear enough to transcribe.

0:00

1x

March 3, 2023

Forwarded to voicemail

1:59 PM