

MultiLine for Salesforce Installation Guide for Salesforce Lightning Admins

Last Modified on 01/13/2023 9:57 am EST

To set up the MultiLine integration into Salesforce Lightning, there are steps that must be followed in the MultiLine Management Portal and in Salesforce Lightning. Read this guide to follow the required steps for the Salesforce administrator.

Overview

This guide is intended for Salesforce Lightning admins. We will let you know when there are prerequisite steps that must be taken by the MultiLine admin.

In this guide you will install the package from the App Exchange listing and configure the MultiLine utility and Messages List to appear on **Contacts**, **Leads**, and **Person Account Records** pages for designated Call Center users.

MultiLine Admin Action Needed

Before proceeding, the MultiLine Admin needs to Create an API User for the Salesforce Admin (https://moviuscorp.knowledgeowl.com/help/multiline-admin-install-guide). When completed, you'll receive a "Welcome Administrator" email, with the credentials you need to get started.

Step 1 - Create user in Salesforce

1. Go to Setup.

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2. Type "Users" in the Quickfind box, then click Users.



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- 3. Click the **New User** button.
- 4. Fill in all required information.
 - 1. For User License select Salesforce
 - 2. For Profile select System administrator

SETUP Users						
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5. Click Save.

Step 2 - Set up public site

1. Type "Sites" in the **Quickfind** box, then click **Sites**.



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Didn't find what you're looking for? Try using Global Search.	Show your teams and customers how you'll safely reopen business during COVID.	Build personalized recommendations of anything for anyone.	Build. Predict. Take action!
	Get Started Learn More	Get Started	Get Started
	Most Recently Used 2 items		
	NAME	TYPE	OBJECT
	API User	User	

- 2. Deploy a site.
 - 1. Enter a Domain Name according to the requirements of your organization and click **Check Availability**.
 - 2. Check the box to accept Terms and Conditions.
 - 3. Click the **Register My Salesforce Site Domain** button.

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2, Sites	Sites
 Sites and Domains Custom URLs 	What is a Site?
Custom URLs Domains	Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capting leads, and so on.
Sites Security	Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visuaforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.
CSP Trusted <mark>Sites</mark> dn't find what you're looking for? using Global Search.	Create multiple sites that appeal to different audiences and satisfy your company's vanious business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing. Sample States URLs My Company force comidevelopers My Company force comidevelopers
-	To get started, first register your company's Salesforce site domain. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce com recommends using your company's name or a variation of your company's name, such as 'mycompanyportat.'
	You cannot modify your Salesforce site domain name after the registration process. http:// [movius-mi-scrum] force.com [CheckAvailability]
	Success: The Salesforce site domain name "movius-mi-scrum" is available.

3. After you are redirected, click the **New** button.

Sites (movius-ml-scrum.force.com)		New			
Site Label +	Site URL	Site Description	Active	Site Type	Last Modified By
No records to display.					

- 4. Complete the information:
 - 1. Site Label: Movius
 - 2. Active checkbox: **checked**
 - 3. Active Site Home Page: **AnswersHome**.
 - 4. Redirect to custom domain: unchecked.
 - 5. Click Save.

Site Label and Site Name are case-sensitive. Note that the "M" in Movius is capitalized.



For more information, see Salesforce Help (https://help.salesforce.com/articleView? id=sites_setup_overview.htm&type=5) [external].

Step 3 - Create Connected App

- 1. Type "App Manager" in **Quickfind** box and click **App Manager**.
- 2. Click on New Connected App button.

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	4 Comme	rce	Commerce	Manage your store's products, catalogs, and pricebooks.	6/2/2022, 6:36 AM	Lightning	~	
	5 Commu	nity	Community	Salesforce CRM Communities	6/2/2022, 6:36 AM	Classic	~	
	6 Consum	ier Goods	Retail	Manage your retail inventory, promotions, planograms and other instore activities	6/2/2022, 6:36 AM	Lightning	~	
	7 Consum	er Goods Visit Execution	RetailOnBrowser	Execute retail store visits by viewing and updating visit details.	6/2/2022, 6:36 AM	Lightning	~	
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	9 Digital E	experiences	SalesforceCMS	Manage content and media for all of your sites.	6/2/2022, 6:36 AM	Lightning	~	
	10 Lightnin	ig Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	6/2/2022, 6:36 AM	Lightning	~	•
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	13 Sales		Sales	The world's most popular sales force automation (SFA) solution	6/2/2022, 6:36 AM	Classic		

- 3. Fill out required details.
 - 1. Callback URL: https://login.salesforce.com/services/oauth2/success
 - 2. Selected OAuth Scopes:
 - 1. Manage user data via APIs (api)
 - 2. Perform requests at any time (refresh_token, offline_access)
 - 3. Require Secret for Web Server: checked

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4. Click Manage.



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		Version 1.0 API Name MultiLine_Connect	
		Created Date 6/7/2022, 11:03 PM BY <u>Anikel Samath</u> Contact Email aniket samath@maantic.com Contact Phone	
		Last Modified Date 6/7/2022, 11:03 PM By: <u>Aniket Samarth</u>	
		Description Info URL	
	 API (Enable OAuth Settings) 		
	Consumer Key and Secret	Manage Consumer Details	
	Selected OAuth Scopes	Manage user data via APIs (api) Perform requests at any time (refresh_token, offline_access)	
	Callback URL	https://login.salesforce.com/services/oauth2/success	
	Digital Certificate	EMAILADDRESS=vavmex200API@gmail.com, CN=vavmex200, OU=vavmex200, O=Movius, L=New York, ST=New York, C=US 11 Mar 2023 10:38:22 GI	T
	Enable for Device Flow		*

5. Edit Policies.

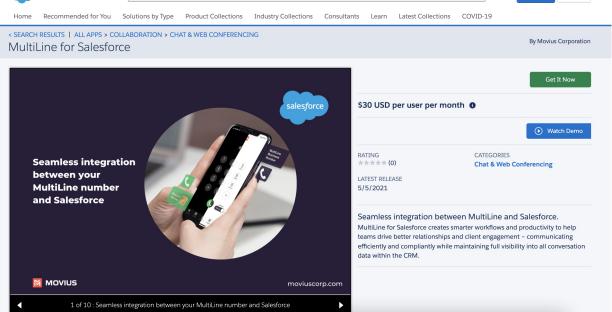
- 1. Permitted Users: Admin approved users are pre-authorized
- 2. IP Relaxation: Relax IP Restrictions
- 3. Refresh Token Policy: Refresh token is valid until revoked
- 4. High assurance session required: unchecked

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	Session Policies				
	Timeout Value	None		High assurance session required	
	Custom Connected App Handler				
	User Provisioning Settings				
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Step 4 - Install MultiLine for Salesforce

Use these steps to install the MultiLine for Salesforce app package for all users.





Sign Up

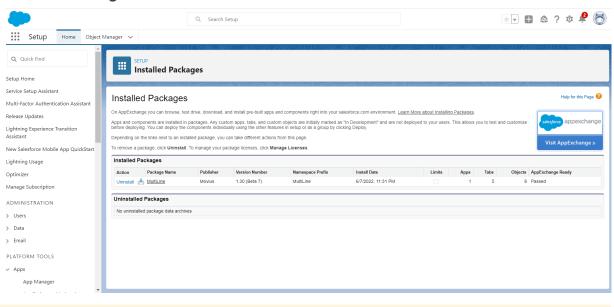
Log In

- 1. Search for **MultiLine for Salesforce** on AppExchange (https://appexchange.salesforce.com/) [external] and select it.
- 2. Click Get It Now and log in with your Salesforce credentials.
- 3. Click Install in Production.
- 4. Enter all required fields and accept Terms and Conditions.
- 5. Click Confirm and Install.
- 6. Click on Install for All Users then Install.

Install MultiLine for Salesforce By Movius Corporation



7. After the installation the MultiLine for Salesforce application will be listed as **MultiLine** within **Installed Packages.**



Note: Users won't have access to MultiLine for Salesforce until you add them to the Call Center



at a later step

Step 5 - Register MultiLine

To connect MultiLine with Salesforce you need to configure the webhook that exchanges information between the services.

come Administrator	
movius.support@moviusc Saturday, January 18, 2020 Movius Support Show Details	corp.com <movius.support@moviuscorp.com> at 11:49 AM</movius.support@moviuscorp.com>
Nina Myers,	
u have been added as an administrator.	Your login credentials are below:
ou have been added as an administrator. sername: <u>nina.myers@gmail.com</u> assword: d4118243 i. https://sml.moviuscorp.net	Your login credentials are below:
sername: nina.myers@gmail.com	-

1. Open App Launcher and open MultiLine Registration.

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	44								

2. In the **Configure Site** tab, select **Movius** from the Select Site menu, then click **Configure**.



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Mu	ıltiLine	Home	Leads 🗸	Accounts 🗸	Contacts 🗸	Tasks 🗸	MultiLine Registration	MultiLine Messages 🗸 🗸	Integration Logs 🗸 🗸	Exception Logs 🗸 🗸	Multiline Configurations	~		
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https://movius-m	nl-scrum.lightr	ing.force.co	om/liahtnina/n	/MultiLine MultiLir	e Registration									

You should see a confirmation message that your site is configured successfully.

- 3. Click **Register Webhooks** tab and enter the information in the fields below:
 - Endpoint Name: MMP
 - Endpoint: https://[MultiLine Management Portal URL]:8021
 - The MultiLine Management Portal URL is listed in your "Welcome Administrator" email. Add ":8021" for the port.
 - Username and Password credentials from the "Welcome Administrator" email.

Endpoint Name		
UatZeta		
Endpoint URL		
https://vavmex200us	moviuscorp.net:8021	
Username		
training.with.prashan	t@gmail.com	
Password		

4. Your Webhook will now display.



			Add New Server
at Edit ttps://vavmex200us.moviuscorp.net:8021 sername: training.with.prashant@gmail.com			
Service Name		Status	
Register Webhook URL		Registration Completed	
Register Message Event		Registration Completed	
Register Call Start Event		Registration Completed	
Register Call End Event		Registration Completed	
Register Voicemail Event		Registration Completed	

Step 6 - Configure MultiLine Messages List

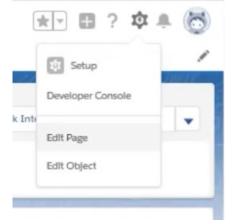
MultiLine Messages View can be added to Contacts, Leads, and Accounts Pages.

How to Add MultiLine Messages List to Contacts page

- 1. Go to the Contacts page and select a **Contact.**
- 2. Access the Setup menu in the upper right-hand of the screen.



3. Select Edit Page.



4. Click in the tab area. *By default you see Related and Details tabs*. This will pull up a section in the far right of the screen.



5. Click the Add Tab button.

Related Details	Activity	Tabs
MultiLine Messages (0) Q. Search Messages		■ Related
No messages found to display.	Email	≡ Details
We found no potential duplicates of this Contact.	Write an email Compose	
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.	Filters: All time + All activities + All types	Add Tab

- 6. By default, the new tab will also be named "Details. Click the tab once to relabel it.
- 7. Select Custom tab label and name it "MultiLine"
- 8. Find MultiLine Messages List View under Components in the left-most section

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✓ Custom - Managed (2)			Opportunities (0)						
 MultiLine Messages List View MultiLine Utility 			Cases (0)						
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- 9. Drag it under the **MultiLine** tab.
- 10. Click Save.
- 11. Click Activate.
- 12. Click App Default. Then Assign as App Default.
- 13. Select desired Lightning apps and click **Next** and **Save**.



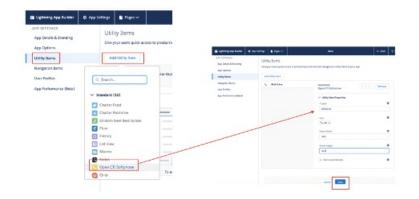
Ligh	tning Apps (6)	
	APP NAME	DESCRIPTION
	LightningBolt	Discover and manage business solutions designed for your industry.
	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience
	Retail	Manage your retail inventory, promotions, planograms and other ins
	Sales	Manage your sales process with accounts, leads, opportunities, and
	Sales Console	(Lightning Experience) Lets sales reps work with multiple records on
	Service Console	(Lightning Experience) Lets support agents work with multiple recor

Repeat the steps above for the **Lead** and **Accounts** pages.

Step 7 - Enable Open CTI for Salesforce connector

The MultiLine Salesforce Connector uses the Open CTI Softphone utility for integration. *Learn more about utilities at Salesforce Help* (https://help.salesforce.com/s/articleView?id=sf.dev_apps_lightning_utilities.htm&type=5) [External].

- 1. Enter "App" in the Quick Find box, then select App Manager
- 2. Select each Lightning app you want to enable with MultiLine
- 3. Select **Edit**
- 4. Select the Utility Items >> Add Utility Item >> Open CTI Softphone
- 5. Rename "Open CTI Softphone" to "MultiLine"
- 6. Set Panel Width to '340' and Panel Height '540'
- 7. Make sure Start Automatically checkbox is selected
- 8. Click Save



Step 8 - Enable Out of Office

- 1. Open Developer Console under Setup
- 2. Click Debug and Open Execute Anonymous Window
- 3. Copy and paste the following code in the window as shown below then click **Execute** to complete



String cronExp = '0 30 * ? * *';

MultiLine.MultilineUpdateOOOStatusScheduler newSch = new MultiLine.MultilineUpdateOOOStatusScheduler(); System.schedule('Multiline OOO Status Scheduler', cronExp, newSch);

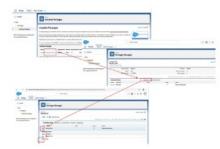
MultiLine Admin Action Needed

Before proceeding, the Salesforce Administrator needs to complete the steps in Configure MultiLine Portal (https://moviuscorp.knowledgeowl.com/help/multiline-admin-install-guide).

Once the MultiLine administrator actions are complete, proceed.

Step 9 - Manage Licenses

- 1. Go to Installed Packages under Setup
- 2. Select MultiLine then click Manage Licenses.
- 3. Click Add User and select your users and click Add to complete



Step 10 - Apply "MultiLine" Permissions set to users

1. Search Permission Sets using the Quickfind box.



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✓ Custom Code	« Back to: Permission Set					
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Content Permissions Assistant	Action Full Name +	Alias	Username	Role Active	Profile	Expires On
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		Adı	d Assignments Remove Assignments			
				A B C D E F G H I J	K L M N O P Q R S T U	V W X Y Z Other All

- 2. Click MML Permissions
- 3. Click Manage Assignments
- 4. Click Add Assignments

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Step 11 - Add users to Call Center

- 1. Go to Call Centers under Setup and click Continue
- 2. Select OpenCTI and click Manage Call Center Users
- 3. Click Add More Users
- 4. Select Users and click Add to Call Center

For Bulk User Import, please see Bulk User Import Configuration for Salesforce (https://moviuscorp.knowledgeowl.com/help/bulk-user-configuration).

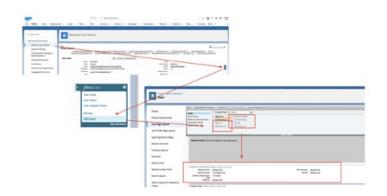
Step 12 - Manage Users

Set Additional Fields to User Layout

- 1. Go to user profile, click on **Settings**
- 2. Select Advanced User Details. Expand the menu on the right and click Edit Layout.
- Under User Page Layout, drag each of the shown fields and drop into Additional Information section as shown. (Fields to be selected: MultiLine, MultiLine Error, MultiLine Registration Date, Old Desk Phone, SIP PIN, SIP Username)
- 4. Click Save.



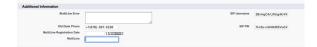
Note: we recommend not granting MultiLine users **Edit** abilities in the **Additional Information** section.



Re-registering users

If the user sees any error (ex: "WebRTC details not found") in the MultiLine utility, re-register user using following steps

- 1. Under Setup, go to Users.
- 2. Click user for User details.
- 3. Click Edit.
- 4. Go to Additional Information section.
- 5. Clear MultiLine error field, MultiLine field and MultiLine Registration Date.
- 6. Save the settings.
- 7. Ask user to logout and login again.



De-provisioning users

If the user needs to be deprovisioned from using MultiLine for Salesforce,

- 1. Clear MultiLine and MultiLine Registration Date as shown in the above steps.
- 2. Change the user Profile to the one that doesn't have MultiLine Permissions or remove MultiLine from user's Assignment

Congratulations!

This completes the configuration of the Salesforce connector for MultiLine. Next time when Salesforce users login into Salesforce, they'll see the **MultiLine** utility in the bottom left bar.

After accepting the terms and conditions, they'll be able to use MultiLine.



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MultiLine Home Leads V Accounts V Contacts V	Tasks 🗸 MultiLine Registration MultiLine Messages 🗸 Integration Logs 🗸	✓ Exception Logs ✓ Multiline Configurations ✓
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See Using MultiLine for Salesforce (https://moviuscorp.knowledgeowl.com/help/multiline-for-salesforce-user) for End-User instructions.