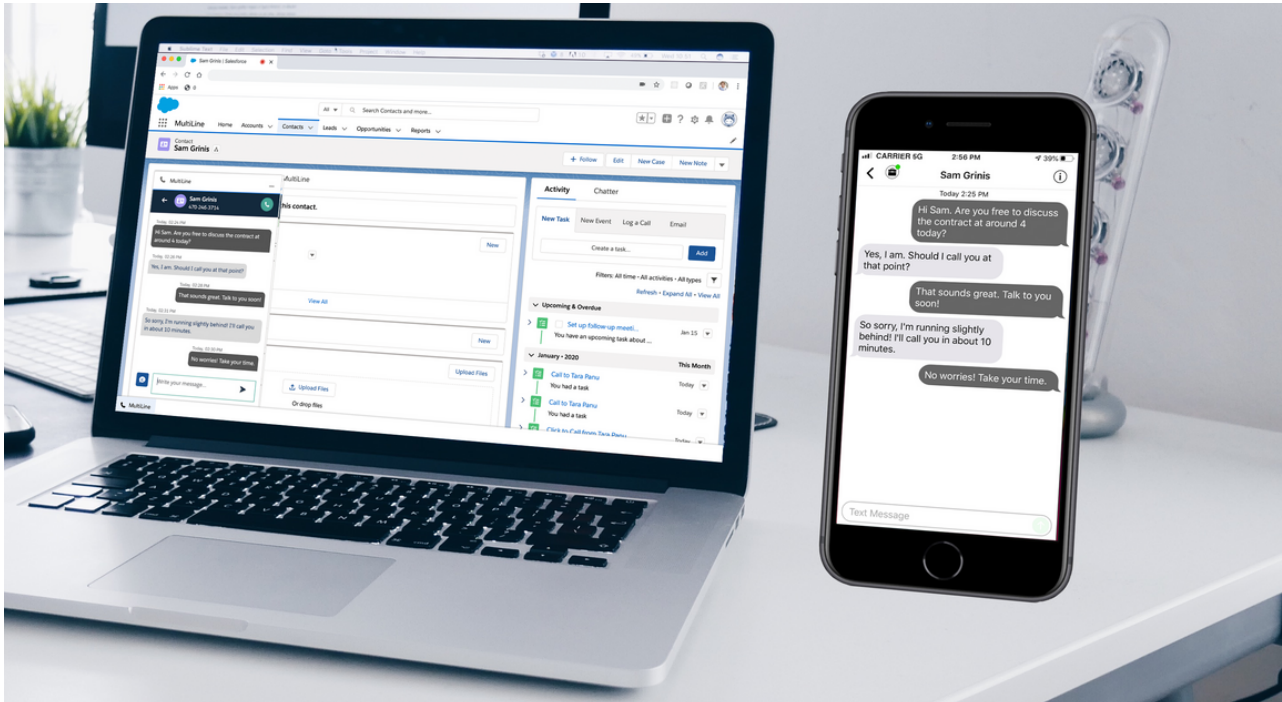


MultiLine for Salesforce Sales Cloud



Optimize your CRM experience, streamline workflows, and increase productivity with seamless integration between your MultiLine solution and Salesforce. Automatic logging inside Salesforce CRM unlocks productivity, fosters deeper client relationships and powers communications data insights.



With MultiLine for Salesforce, sales teams, wealth managers, and financial advisors benefit from an unmatched user experience – all business conversations through the MultiLine app are automatically captured and logged inside the Salesforce CRM.

Highlights

Enhanced User Experience

Users can make and receive calls and texts and access core business phone functions without ever having to leave Salesforce so they can spend more time closing deals and less time navigating tabs.

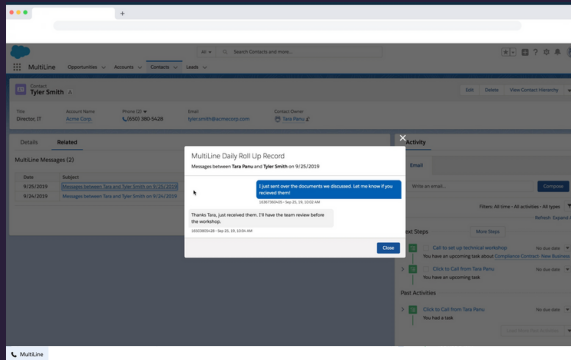
Auto-Data Capture

A record of all calls and messages from MultiLine is instantly captured and logged automatically within the CRM, eliminating manual entry and providing users complete visibility into client interactions.

Productivity and Compliance

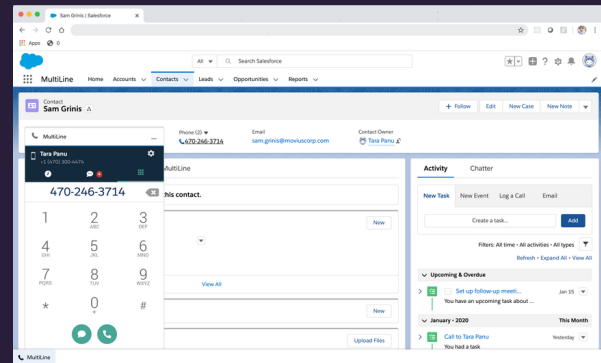
Automate daily tasks with quick-reply texts and the ability to add notes during or after calls. Supports MultiLine's compliance features including voice and text recording, lexicon and SMS opt-in.

How it works



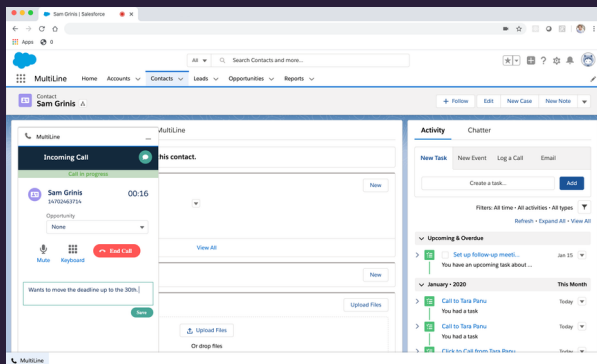
Auto-data capture

All calls and messages from MultiLine automatically get logged and captured in CRM.



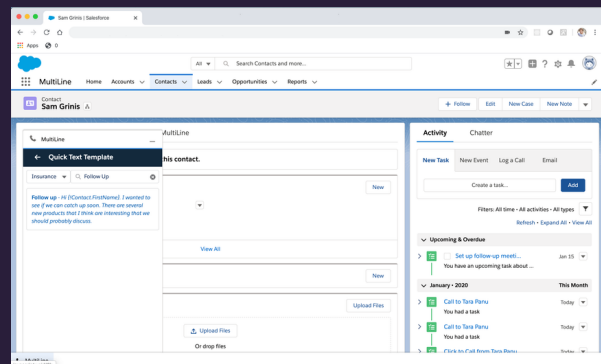
Call and text directly in CRM

All numbers become clickable. Simply click on the contact number and you have the option to call or text using the built-in MultiLine widget.



Capture call notes

Add notes directly in the call window. After saving, you will notice that the call log details are automatically filled and noted in the activity timeline.



Quick-reply texts and Out-of-Office

Easily customize and add quick-reply texts. Set up your MultiLine to have an out-of-office reply.

MultiLine for Salesforce is designed to effortlessly integrate client communications into your key Salesforce workflows to help improve employee productivity, enhance customer experience, and boost your bottom line.

Currently supports Salesforce Sales Cloud and Salesforce Lightning Experience.