

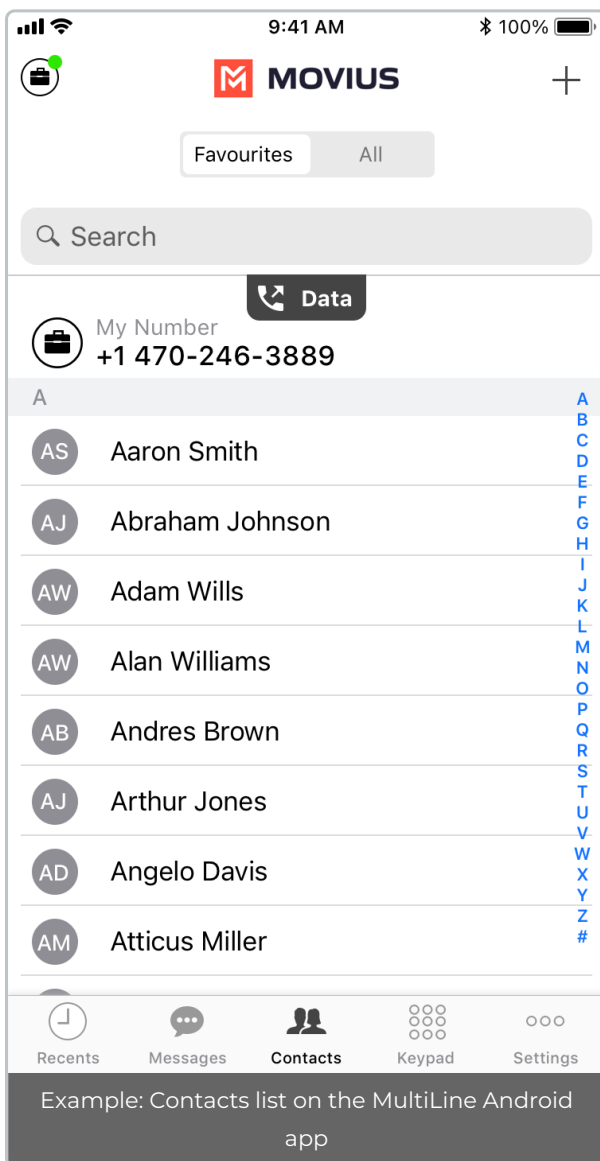
Using MultiLine Contacts list

Last Modified on 12/13/2021 8:59 pm EST

Read on to learn how to set up your contacts list.

Overview

- The MultiLine app provides you a separate contact list to use to make your business calls. We offer three options for starting your Contacts list: Exchange Contacts, Native Contacts, and Local Contacts, described below.
- Once you set up your Contacts list, any contacts will appear on the Contacts screen. You can:
 - Tap a contact to see options for calling and messaging them.
 - View, add, and update contacts.



Before you start


- If your organization chooses to restrict the type of Contacts setting you can use, you may not

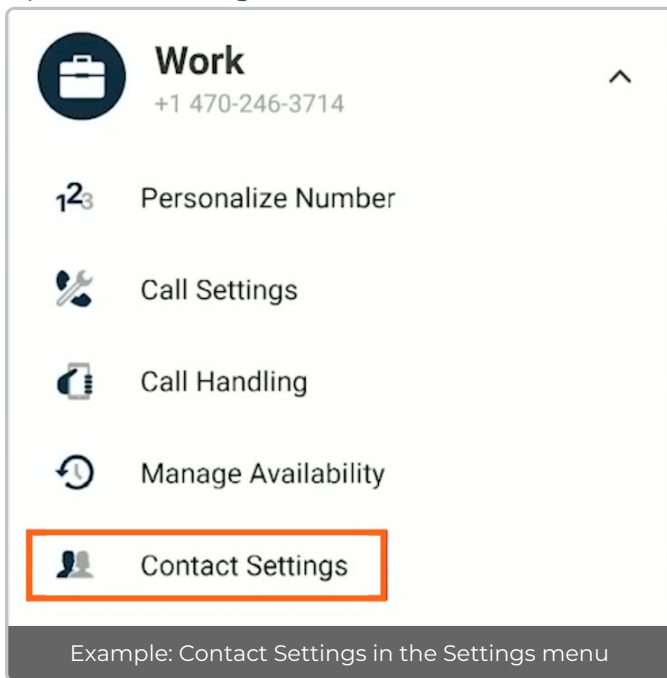
see certain Contact Source options.

- MultiLine for Intune and Movius for BlackBerry users will use Exchange Contacts.
- We recommend Exchange Contacts for the best experience with MultiLine Desktop.

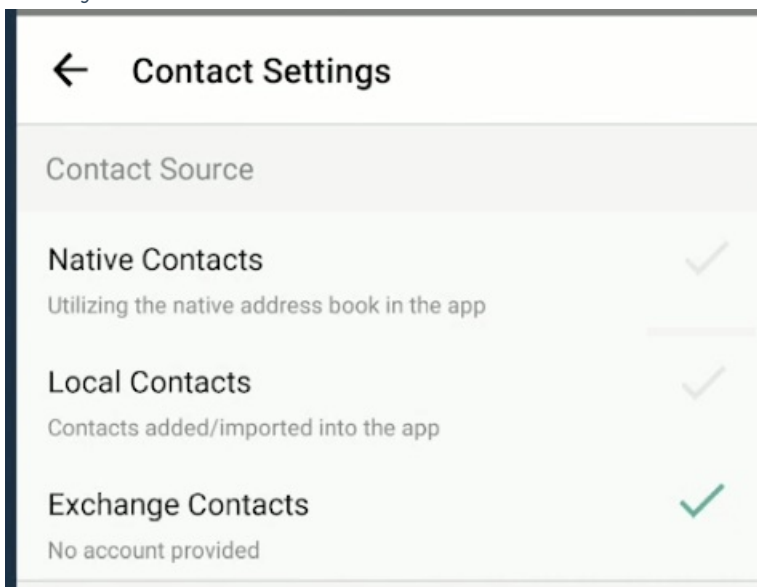
How to choose your Contact Settings

You have options for sourcing, sorting, and displaying contacts. You'll need to choose your **Contact Source** in **Contact Settings** before you begin adding contacts.

1. Tap the menu icon  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap **Settings**.
3. Tap **Contact Settings**.



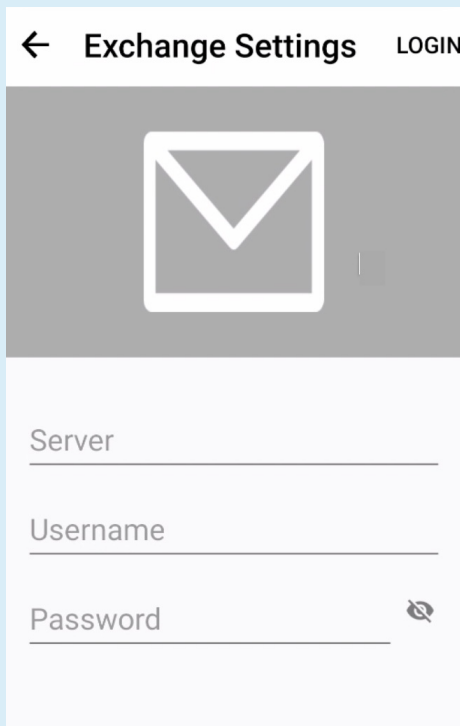
Select your chosen contact source:



Exchange Contacts	Local Contacts	Native Contacts
<ul style="list-style-type: none"> • Connect to an Exchange server, such as Outlook or BlackBerry Exchange • Two-way sync: contacts added or updated in MultiLine or Exchange server will update both lists. 	<ul style="list-style-type: none"> • Manually add contacts to a Contacts list that exists only within the MultiLine app • <i>Note: Local Contacts are deleted when you uninstall MultiLine or switch to a different Contacts source</i> 	<ul style="list-style-type: none"> • Sync with the Contacts app on your personal device or within the EMM container • Two-way sync: contacts added or updated in MultiLine or Contacts app will update both lists

If you select Exchange Contacts...

If you're a MultiLine for Intune or Movius for BlackBerry user it may autodetect. Otherwise, you will see a screen to enter the Exchange server details.

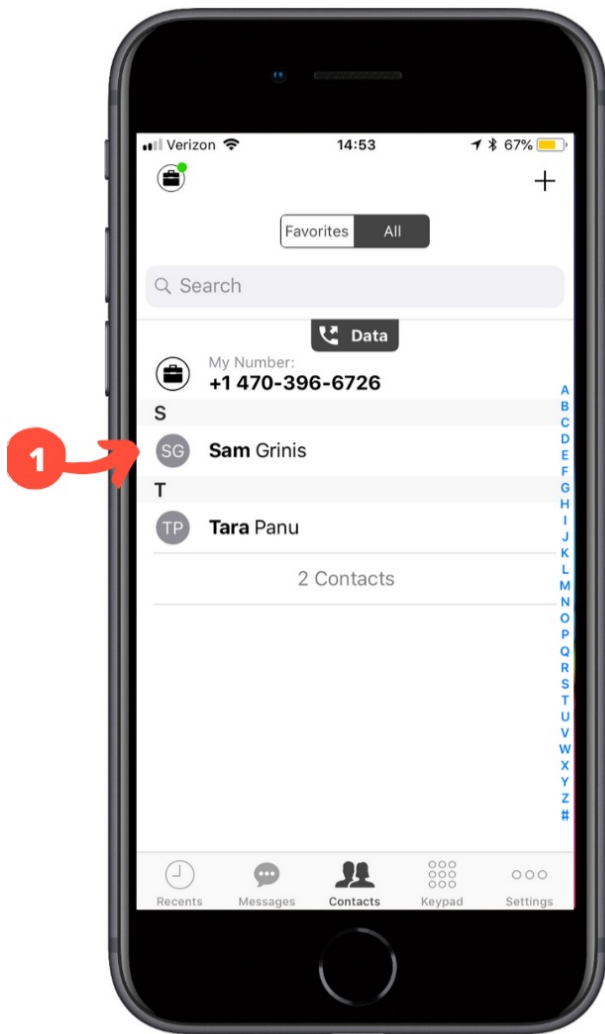


The screenshot shows a mobile application screen titled "Exchange Settings" with a "LOGIN" button in the top right corner. Below the title bar is a large grey square containing a white envelope icon. Underneath the icon are three input fields: "Server", "Username", and "Password". The "Password" field has a small eye icon to its right, indicating a toggle for visibility. A back arrow is visible in the top left corner of the screen.

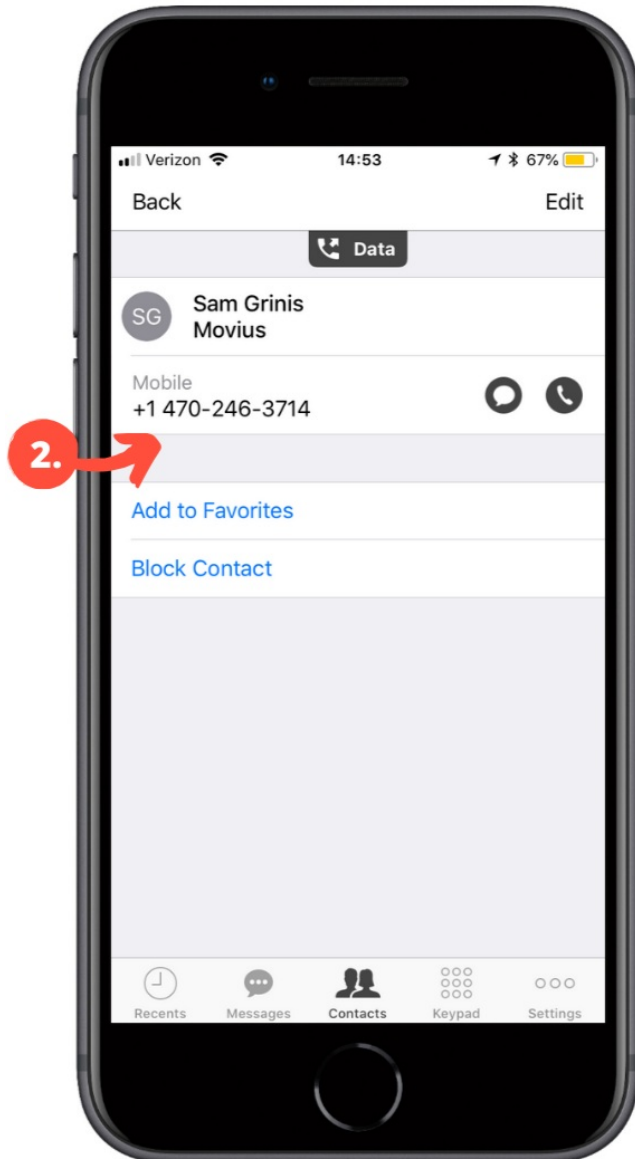
View a contact

To view, edit, delete, or message contacts, you must have at least one contact.

1. The **Contacts** tab displays all contacts in alphabetical order by default. *Note: The next set of instructions will teach you how to change this setting if you like.*




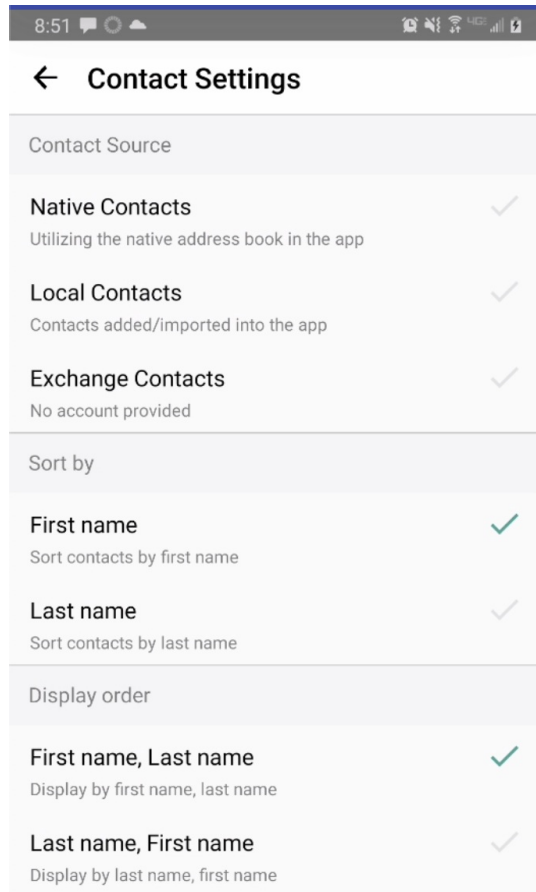
2. Clicking on any contact will bring you to that contact's information page, where you can call, message, favorite, or block the contact.



3. Clicking on the **edit** button in the top right-hand corner allows you to choose to delete or edit, the selected contact.

Change the Contacts list display and order

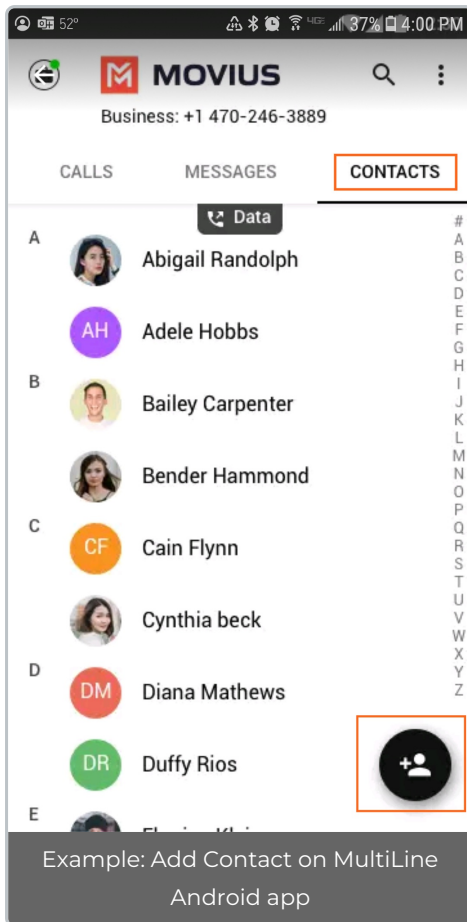
1. Tap the **menu icon**  in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap **Settings**.
3. Tap **Contact Settings**.
 - You can sort by first or last name
 - You can display first name or last name first



4. When complete, you can exit the menu and your Contacts list will be in the chosen **Sort by** and **Display order** settings selected.

Add a contact

It's easy to add contacts in the MultiLine application.



1. Go to the **Contacts** tab.
2. Click the **Add Contact** button.
 - Fill out as many details as desired:
 - First name
 - Last name
 - Phone
 - Email
 - Address
 - Clicking "Add Phone field", "Add Email field", or "Add Address field" will let you associate multiple phone numbers, email addresses, and addresses for the contact. You can choose labels for each field.

During onboarding, you should have chosen your Contact Settings, your contacts will either be sourced from an Exchange server, your native device, or locally in MultiLine. See below for details on how adding contacts works for the different settings.

Add a contact - Using Exchange Contacts

- Using the **Exchange Contacts** option means MultiLine gets your contacts from a corporate exchange database.
- Any changes made to the corporate exchange (adding, renaming, deleting, etc.) will automatically be reflected in the MultiLine app and vice versa.
- You'll be able to search for any contact from the Global Address List (GAL), your company's list of all employees. However, the full GAL will not show up in the list of contacts for performance reasons.

Add a contact - Using Native Contacts

- Using the Native Contacts option means MultiLine uses the same contacts list as your native phone.
- Any changes made to your native Contact List (adding, renaming, deleting, etc.) will be reflected in MultiLine and vice versa.

Add a contact - Using Local Contacts

- This is the default contact setting.
- Using the Local Contacts option means your contacts exist within the MultiLine app only.
- You can choose to do a one-time import from your native device and/or manually add contacts yourself.
 - Changes made in MultiLine (adding, renaming, deleting, etc.) will NOT be reflected in your native contact list, and vice versa.
 - There is no automated syncing between the Native and Local Contact Lists.

NOTICE: The Local Contacts list isn't backed up or stored outside the application, so they can be lost if you lose your device or need to reinstall MultiLine.

*NOTICE: if you create your Contacts list using Local Contacts, and then switch your source to Native or Exchange, the contacts you created **will be deleted**.*

Update contact with a new number

If you have a contact that calls you from a new number you can update that contact with the new number.

iOS

1. Go to **Calls**.
2. Tap the blue information icon for the unknown number.
3. Tap **Update**.
4. Enter the name or number of the existing contact you want to update.
5. The new number will be added.
 - From this screen you can change the label, if desired.
 - If you need to delete the previous number, tap the x and confirm.
6. Tap **Save**.

Android

1. Go to **Calls**.
2. Tap the down arrow for the unknown number.
3. Tap **Update**.
4. Enter the name or number of the existing contact you want to update. *Note for Exchange Contacts users: this does not search the entire GAL.*
5. The new number will be added.
 - From this screen you can change the label, if desired.

- If you need to delete the previous number, tap the x and confirm.
6. Tap **Save**.

Add a Favorite contact

You may want to add contacts that you're in touch with more frequently to your favorite contacts. This makes it easier to start new calls or messages with them.

To add a contact to your favorites

1. Go to the **Contacts** tab.
2. Click your contact to open the **Contact** details.
3. Click the **Star** in the upper right-hand corner.

After you've added a contact to your contacts, you will see the Star on their icon.
