

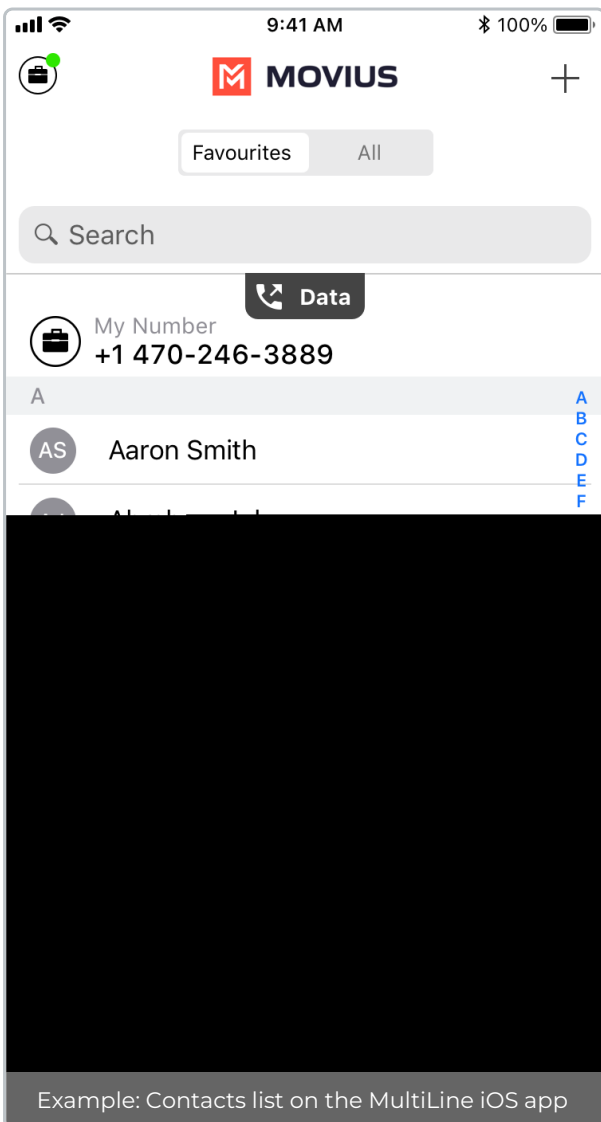
Get Started with Contacts

Last Modified on 09/29/2022 4:54 pm EDT

Read on to learn how to set up your contacts list to use Exchange Contacts.

Overview

- You can set up your MultiLine app to populate the Contacts list to 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.
- 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

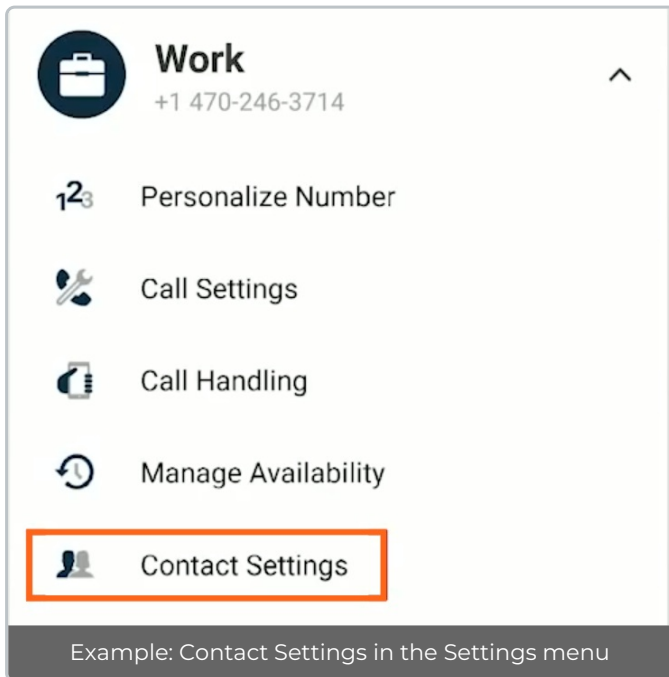
- Your organization must grant you permission to use Exchange Contacts for this setting to be

available in your Contact Settings.

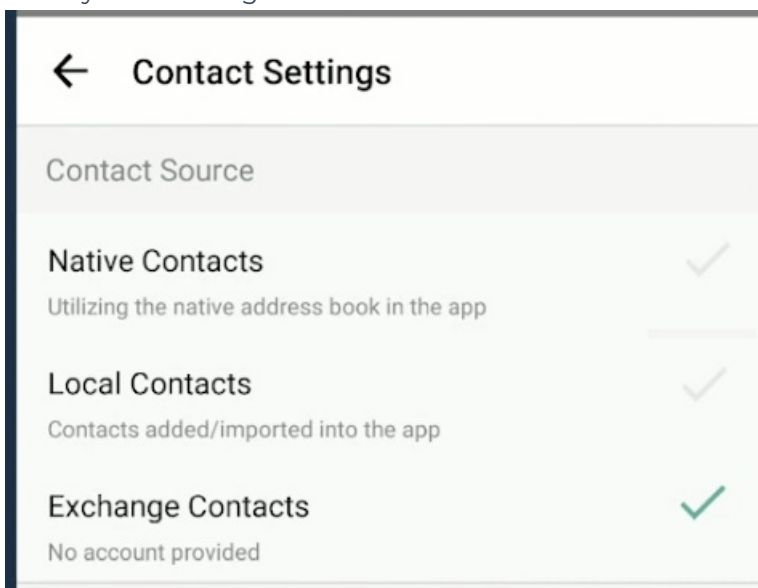
How to set your Contact Settings to Exchange

You'll need to set your **Contact Source** in **Contact Settings** to begin syncing **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 Exchange Contacts:

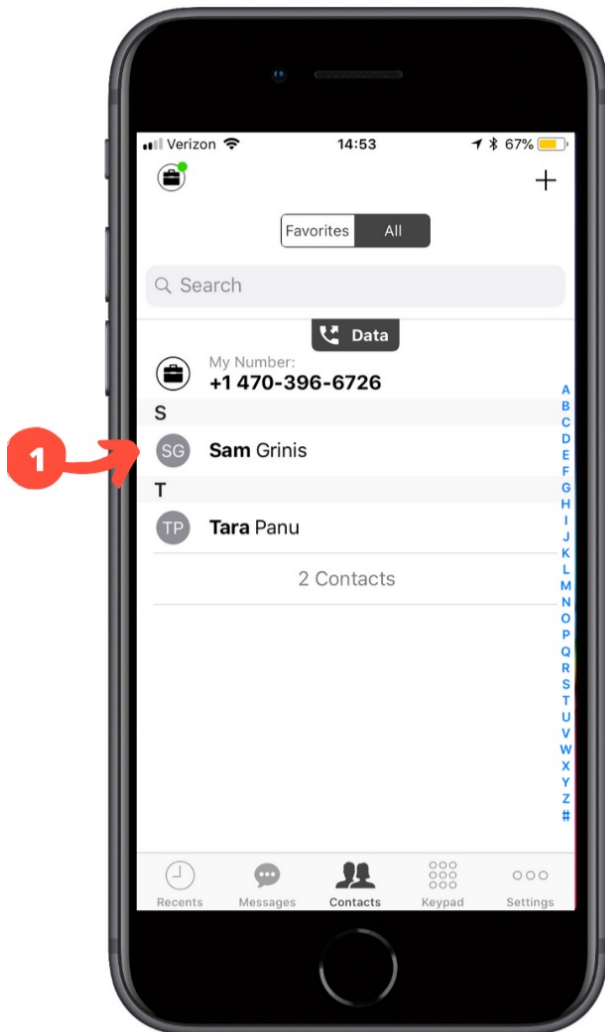


If you're using MultiLine for Intune, or Movius for BlackBerry, your settings will automatically sync. Otherwise you will need to enter the Exchange Server URL when prompted (this should be provided by your IT admin) and sign in with your corporate credentials.

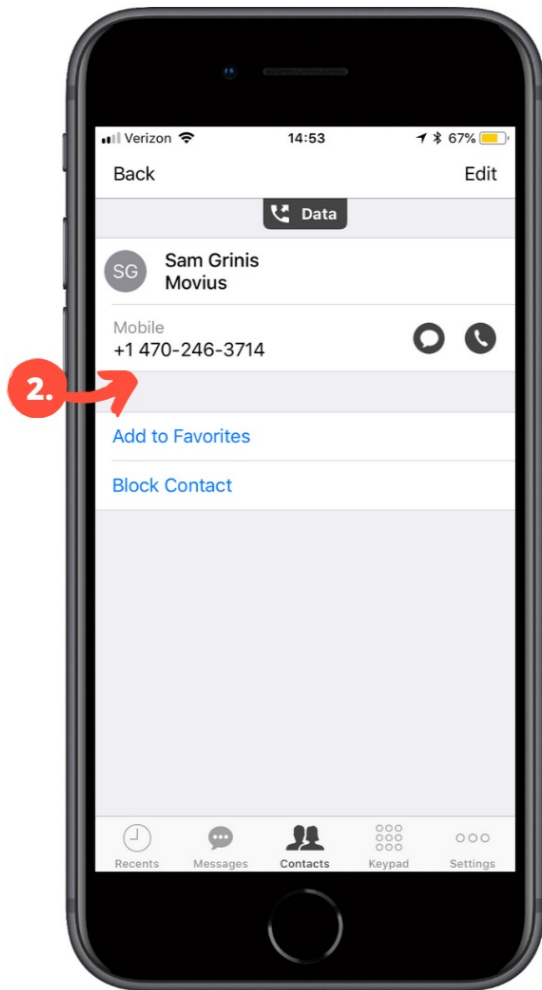
View a contact

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.*



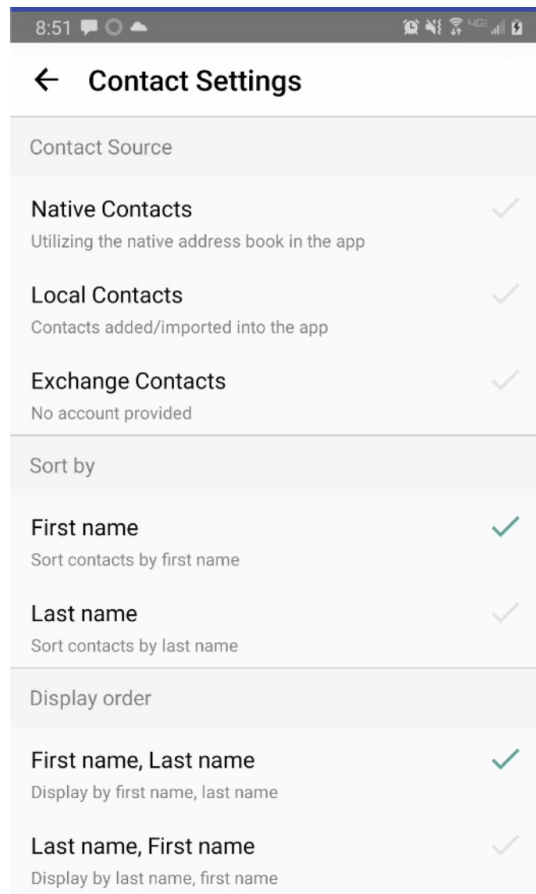
2. Clicking on any contact will bring you to that contact's information page, where you can call, message, favorite, or block the contact.



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

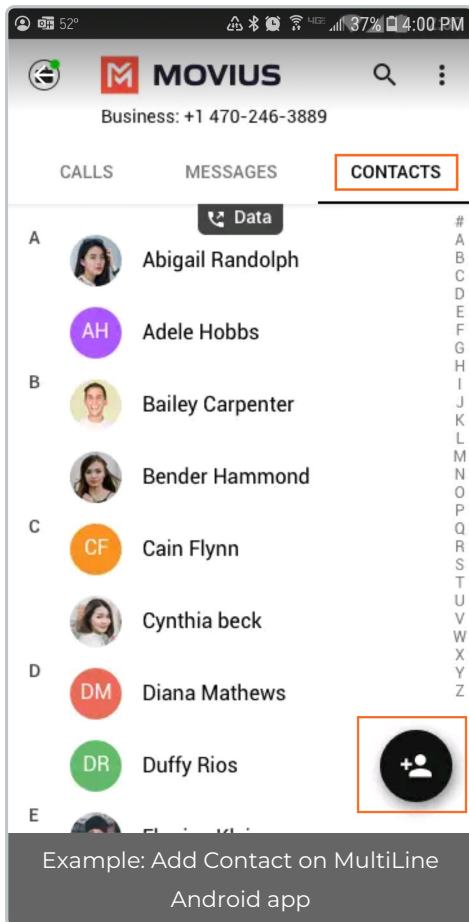
1. Tap the **menu icon** ☰ in the bottom right (iOS) or upper right-hand corner (Android).
2. Tap **Settings**.
3. Tap **Contact Settings**.
 - You can sort by first or last name
 - You can display first name or last name first



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
 - Tapping "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.

- Using the **Exchange Contacts** option means you are syncing 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.

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.

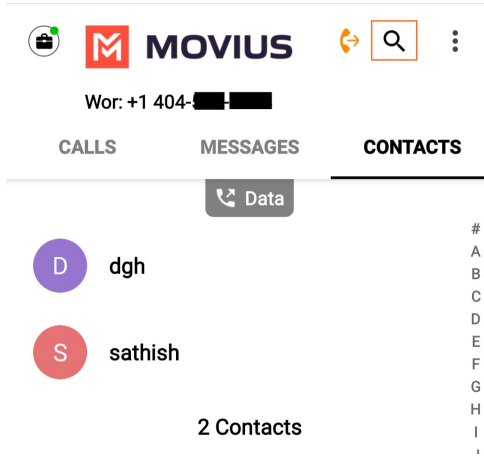
After you've added a contact to your contacts, you will see the Star on their icon.

How to search and store a contact from Exchange (Android Only)

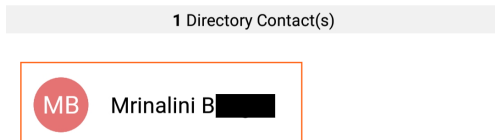
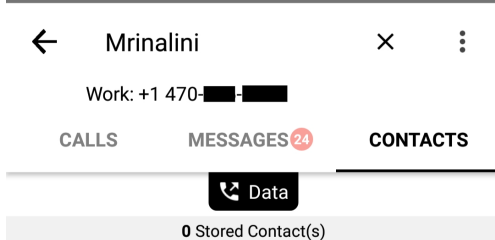
When you're using Exchange contacts, you'll be able to search for any contact from the Global Address List (GAL), your company's list of all employees. However, the full GAL will not show up in the list of contacts for performance reasons. Therefore, you may want to store the contacts you contact often.

This feature is only available in the Android version of MultiLine applications.

1. To search for a contact, tap the **Search** icon and enter the name or number of the contact you want to look up.



2. Your result will be displayed in two categories **Stored Contacts** and **Directory Contacts**. To store the directory contact, tap the result.



3. Tap the **Add Contact** button. Now this contact is a **Stored Contact** and will appear in the **Contacts** tab.

