

Bria for Salesforce

Admin Guide - Version 2.0



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About this document

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Version 1.128 (June 2016)	

Introduction for Bria for Salesforce

Bria for Salesforce[®] is an add-on to your Salesforce setup that allows you to leverage your existing PBX or VoIP/SIP services to place calls directly from Salesforce. Bria for Salesforce collects call-related data in Salesforce for analytics.

After a sales administrator integrates Bria into their Salesforce setup, each end user downloads the Bria Stretto client on their computer, and logs into a CounterPath login and provisioning server called Stretto. Both Bria and Stretto work with Salesforce to place calls and capture call-related data.

Naming conventions

Bria, Bria Stretto, and Bria for Salesforce are used throughout the document.

- Bria for Salesforce: The Bria for Salesforce add-in.
- Bria: The installation of Bria running in Salesforce, the Bria Sidebar.
- Bria Stretto: The Bria Stretto client that is separate from Salesforce.
- Stretto: The CounterPath login and provisioning server.

About this guide

This guide is intended for a sales administrator who is responsible for the setup, configuration, and maintenance of their organization's Salesforce applications. This guide explains how to configure Bria for Salesforce, how to manage users, how to customize Bria for Salesforce, and how to build reports using call-related data captured by Bria for Salesforce.

To learn the features available to end users after integrating Bria for Salesforce, read the Bria for Salesforce User Guide.

To learn how to use the Bria Stretto client from an end user's perspective, read the Bria Stretto User Guide.

Supported Salesforce Editions

Bria for Salesforce works with the Professional Edition, the Enterprise Edition, and the Unlimited Edition.

Bria for Salesforce supports the Lightning Experience and the Salesforce Classic user interfaces.

Devices

Bria for Salesforce provides the use of up to five devices per user. If a user has a work computer and a home computer, the device count is two because they are different machines.

CounterPath offers Bria Stretto clients on Windows, Mac, iOS, and Android. Only Bria Stretto for Windows and Bria Stretto for Mac support Salesforce integration. The mobile clients do not capture call information and save it in Salesforce.

Prerequisites

In order to use Bria for Salesforce, your organization requires:

- A subscription to a SIP service or a SIP-compliant PBX
- A subscription to Salesforce for each user
- A subscription to Bria for Salesforce for each user

The Lightning Experience

You can use Bria for Salesforce in Salesforce Classic or in the Lightning Experience. This section describes the Bria for Salesforce administration tasks using Bria for Salesforce in the Lightning experience.

To learn how to administer Bria for Salesforce in Salesforce Classic, see Salesforce Classic.

The Lightning Experience topics

Configuring Bria for Salesforce Managing Bria users Switching a user to the Lightning experience Switching a user to Salesforce Classic Customizing Bria for Salesforce Activities and call logs Reports and Dashboards

Configuring Bria for Salesforce - Lightning

Initial configuration

To complete the initial Bria for Salesforce configuration, you must be a Salesforce admin.

The initial configuration consists of the following steps:

- 1. Admin: Install the Bria for Salesforce package from the Salesforce AppExchange[®].
- 2. Admin: Assign available Bria for Salesforce licenses to Salesforce users.

- 3. Admin: Configure your organization's PBX in the Bria Admin page in Salesforce.
- 4. Admin: Enable users to use the Bria for Salesforce add-in. This step creates a Bria Stretto login account. Bria Stretto/CounterPath send users an email with their Bria Stretto login credentials.
- 5. Admin: Assign the Bria for Salesforce permission set to users.
- 6. Users: Log in to Bria Stretto and Salesforce.

Information required

Information about your PBX/SIP service is required for the initial configuration. If you are not familiar with PBX/SIP services, talk to your IT department to obtain the required information.

Alternatively, you can email the IT personnel during configuration and they can complete the PBX/SIP service set up.

The following information is required for your PBX/SIP server:

- SIP domain
- Proxy
- Voicemail number
- Your SIP username, password, and authorization name (if used by the SIP server)

Installing the BriaLightning package

The Bria for Salesforce package is found on the Salesforce AppExchange.

To download the Bria for Salesforce package

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Setup in the Salesforce user interface header.



3. Search for appexchange and click AppExchange Marketplace.

Q appexchange	
Apps	
AppExchange Marketp	12.50

- 4. Search for Bria.
- 5. Click Get It Now.
- 6. Follow the prompts to install Bria. Choose the Install for All Users option.

Assigning Bria for Salesforce licenses

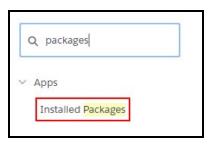
Before Salesforce you can use the Bria for Salesforce add-in, they need to have a Bria for Salesforce license assigned.

To assign a Bria for Salesforce license

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Setup on the Salesforce user interface header.

☆ +	?	\$	Ļ	0
A Setup]		1111	
Edit Page				

3. Search for packages and click Installed Packages.



4. Click Manage Licenses for the BriaForSalesforce package.



5. Click Add Users.

ackage Details BriaForSales Back to Previous Pag				Help for this Page 🥹
Package Name	BriaForSalesforce		Publish	er CounterPath Corporation
Status	Active		Allowed Licens	es 20
Expiration Date	14/11/2018		Used Licens	es 14
	ABCDEFG	H J K L	MNOPC	0 R S T U V W X Y Z Other Al
Licensed Users	Add Users	s Remove Multi	ple Users	
Action Full Name	+	Role	Active	Profile

A list of Available Users appears.

6. Select your user.

If you do not see your user in the list, click more.

Action	Full Name 1	Role	Active	Profile	
	Isiche, Jorge	050	1	System Administrator	
•	Klapenberg, Mark		1	System Administrator	
	Paik, Kenny	CEO		System Administrator	
	Rahmat, Fahim	080	1	System Administrator	
	Fingers, Matt	030		System Administrator	

Your user shows in the Selected Users list.

7. Click Add.

Selec	ted Users	
Action	Full Name	
1	hidro, Jerge	
	Klagariberg, Illaris	
•	Rehmal, Bahim	

You have a Bria for Salesforce license assigned to them.

Configuring your PBX/SIP server

After installing Bria for Salesforce, set up Bria for Salesforce so that it can connect with your PBX/SIP server.

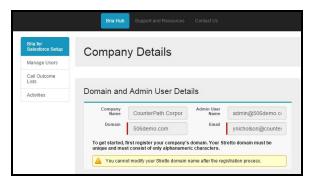
To configure your PBX/SIP server

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click the App Launcher and click Bria Admin.

***	Sales	Home

The Bria Hub opens.

3. Complete the Company Details.



- Company Name: Populated from Salesforce.
- Domain: The domain for Bria Stretto login. Typically, your organization's domain used for email, such as counterpath.com from yasmin.brown@counterpath.com. Keep it short all end users need to enter this domain name when logging into the Bria Stretto client. The domain name must be unique in the Stretto server hosted by CounterPath; your value will not be accepted if other organizations already use the domain name.
- Bria Group Administrator ID: Generated by CounterPath for your organization. This is a group account that can be shared by all administrators in your organization. This account may be used later for accessing Stretto.
- Bria Group Email: An email address for the group admin account at your organization. CounterPath emails this address when the group admin access to Stretto is available.
- 4. Configure your PBX settings.

If you are not familiar with the PBX configuration, choose **No** and enter an email address of the Telecom administrator in your organization. The Telecom administrator receives an email with a link to populate PBX configurations.

- **Domain**: This is the SIP domain for your PBX/SIP service provider such as Asterisk or Broadworks.
- **Proxy**: Outbound proxy for SIP traffic. The value can be a host name or an IP address. A port number can be added after a colon (:) such as aaavoipprovider.com:5070.
- Voicemail: A number to listen to voicemail, such as 600.

		Upda
Are you the Telecom Administrator?		SIP Server Settings
● Yes ● No	Domain	aaavoipprovider.com
	Proxy	
	Voicemail	600

5. Click Update.

The Adding First Bria user screen appears.

Adding the first Bria user

Once you have configured Bria to connect with your PBX, you can add your first Bria user - you.

To add the first Bria user

1. Select **Account Enabled** to start subscribing to Bria. When you enable this option, a Bria Stretto account is created for you.

		Res	et Bria Login 🛛 Upda	te User Setting:
Account Enable	ed 🖉		Default	•
SIP(PBX) Account	Settings			
Sip User Name	Yasmin.Brown	Sip Display Name		
Sip Authorization Name		Sip Password		
Recording Settings				
Display Recording Feature		Recording Folder		

- 2. Fill out the SIP(PBX) Account Settings:
 - Sip User Name: A username for the SIP service. Typically the username portion of the SIP account (Yasmin.Brown from Yasmin.Brown@aaavoipprovider.com)
 - **Sip Authorization Name**: Provide this information only if your SIP server requires it. Typically, each user has a unique authorization name.
 - **Sip Display Name**: The name that appears on caller ID when you make a Bria call. The display name is determined by you.
 - **Password**: A password to register to the SIP server. This is typically provided by your VoIP provider.
- 3. Click Update User Settings.

An email is sent with your Bria credentials from Bria/CounterPath to the email account associated with Salesforce.

Assigning the Bria for Salesforce permission set

After setting up the PBX/SIP server, you need to be assigned the appropriate Bria permission set.

To assign the Bria permission set

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Setup on the Salesforce user interface header.



3. Search for permission and click Permission Sets.

Q permission	
∨ Users	
Permission Sets	

4. Click Bria for Salesforce PermissionSet Administor.

N	lew 🔇	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
	Action	Permission Set Label ↑	Description	License
	Clone	Bria PermissionSet Administ	Bria PermissionSet Administrator	Salesforce
	Clone	Bria PermissionSet Standar	Bria PermissionSet Standard	Salesforce

5. Click Manage Assignments.



6. Click Add Assignments.

Assigned Users Bria PermissionSet Ac « Back to: Permission Set	Iministrator	Help for this Page 🤣
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
	Add Assignments Remove Assignments	

7. Select your user and click Assign.

If you do not see your user, click more.

Vie	W: Al			ite New View				Previous Page	
		A	BCD	E F G H I J K L M	N O P Q R	SIT	UVV	WXYZ	Other
				Assign Cancel					
	Action	Full Name 🕈	Alias	Username	Last Login	Role	Active	Profile	Manag
	Edit	and type	Det l	Residence and		CEO	1	System Administrator	
	Edit	March 1998	inter-	Index description of the	21/12/2017 4:46 PM	CEO	~	System Administrator	
	Edit	Contract.	1004	state to show the	02/06/2017 3:39 PM		1	System Administrator	
	Edit	Berkelden Kanatan	Color.	Month and an Architecture of the	02/03/2018 12:14 PM	CEO	1	System Administrator	
	Edit	Sp. Cont.	10.0	NUM COLUMN AND	11/10/2017 6:34 PM	CEO		System Administrator	

The Bria permission set is assigned to you.

Installing the Bria Stretto client

Now that your user has been created, you can log in to Salesforce and download the Bria Stretto client. After downloading the client, log in to Bria Stretto with the credentials emailed by CounterPath/Stretto.

To install the Bria Stretto client

- 1. Log in to Salesforce.
- 2. Click **Download** in the Bria Sidebar.



- 3. Install and start the Bria Stretto client.
- 4. Log in with the credentials you received by email.

Select both Remember sign in information and Sign in automatically.



The Bria for Salesforce add-in is ready to use in Salesforce.

Tip: Add the Bria Admin tab to your default display for easier access.

Managing Bria users - Lightning

The Salesforce admin needs to enable Bria for Salesforce and add the PBX/SIP credentials for each Salesforce user. Once Bria for Salesforce is enabled for the user, a Bria Stretto account is automatically created by CounterPath and the Bria Stretto credentials are sent to the user via email. The user logs into the Bria Stretto client and the Bria Stretto client registers with the PBX.

Enabling Bria for Salesforce incurs the subscription fee for each user. As an Salesforce admin, you can suspend a user if the user no longer need to use Bria for Salesforce. When a user is suspended from Bria for Salesforce, the user can continue to use Salesforce without the Bria for Salesforce add-in.

Bria User Configuration

You can review the list of Salesforce users and see whether they are active Bria users. You can enable or suspend Bria for Salesforce for a user, as well as reset their Bria Stretto password from the users list.

Bria User Configuration fields

Salesforce User Name: Read only. This field is populated by Salesforce. If a team

member is not listed here, the user probably has not been added to Salesforce. Add the user to Salesforce the usual way, and then come back to this page.

Bria Login: The login username for Bria Stretto clients. This field is empty until Bria is enabled for the user. Once the Bria user has been enabled, CounterPath creates the username and password.

Active Bria User: If this field is empty, Bria has not been enabled for the user or Bria has been suspended for the user. If this field is selected, Bria is enabled for this user.



Enabling Bria for users

In order for Salesforce users to use Bria for Salesforce, Bria for Salesforce has to be enabled for the user.

User configuration consists of the following steps:

- 1. Admin: Assign available Bria for Salesforce licenses to Salesforce users.
- 2. Admin: Enable users to use the Bria for Salesforce add-in. This step creates a Bria Stretto login account. Bria Stretto/CounterPath send users an email with their Bria Stretto login credentials.
- 3. Admin: Assign the Bria for Salesforce permission set to users.
- 4. Users: Log in to Bria Stretto and Salesforce.

Information required

For each user, the following information is required:

• The SIP username, password, and authorization name (if used by the SIP server)

Assigning Bria for Salesforce licenses

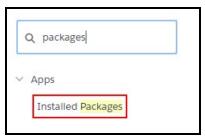
Before Salesforce users can use the Bria for Salesforce add-in, they need to have a Bria for Salesforce license assigned.

To assign a Bria for Salesforce license

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Setup on the Salesforce user interface header.



3. Search for packages and click Installed Packages.



4. Click Manage Licenses for the BriaForSalesforce package.



5. Click Add Users.

Package Details BriaForSales Back to Previous Pag						Help for this Page 🥝
Package Name	BriaForSalesfor	ce		Publis	her	CounterPath Corporation
Status	Active			Allowed Licen	ses	20
Expiration Date	14/11/2018			Used Licen	ses	14
	ABCDB	E F G H	K L	MINIOP	QR	S T U V W X Y Z Other A
Licensed Users		Add Users	Remove Multi	ple Users		
Action Full Name	*		Role	Active	Prot	lle

A list of **Available Users** appears.

6. Select the users you want to add the Bria for Salesforce license to.

If you do not see the user you want in the list, click more.

Action	Full Name +	Role	Active	Profile	
	Iniche, Jonge	050	1	System Administrator	
	Klapenberg, Mark		~	System Administrator	
	Pak, Kenty	CBO		System Administrator	
	Rahmat, Fahim	069	1	System Administrator	
	Fingers, Met	030		System Administrator	

The selected users show in the Selected Users list.

7. Click Add.

Selec	elected Users			
Action	Full Name			
	isidro, Jerge			
1	Klagariyeng, lilaris			
1	Rehmal, Rohm			

The Salesforce users have a Bria for Salesforce license assigned to them.

Adding Bria users

After you assign a license to a user, you can add them as a Bria user.

To add Bria for a user

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click Manage Bria Users.

Bria for Salesforce Setup	Company Details
Manage Bria Users	
Call Outcome Lists	
Activities	Domain and Admin User Details

A list of all Salesforce users appears.

4. Select the user you want to enable Bria for and click Add/Update User(s).

asmin.brown@	demo.com	yasmin.brown@demo.com	Z	
Add/Update User(s)	Cancel Refresh			

The Settings for username section appears below the list of users.

- 5. Fill out the user's settings.
 - Account Enabled: Select to start subscribing to Bria for this user. A Bria account is created for the user.
 - Call Outcome list: Use the drop-down list to choose the default list for call outcome options for the user. End users can update their User Settings to change the default list for call outcomes as well. See Customizing Bria for SalesforceBria for Salesforce for more information on configuring Call Outcome options.
 - SIP(PBX) Account Settings: The SIP information for each user. If you are unfamiliar with SIP, get the information from the IT support.
 - Sip User Name: A username for the SIP service. Typically the username portion of the SIP account (Yasmin.Brown from Yasmin.Brown@aaavoipprovider.com)

- Sip Authorization Name: Provide this information only if your SIP server requires it. Typically, each user has a unique authorization name.
- **Sip Display Name**: The name that appears on caller ID when you make a Bria call. The display name is determined by you.
- **Password**: A password to register to the SIP server. This is typically provided by your VoIP provider.
- SIP Server Override Settings: Complete this section if you want to assign a different SIP account than the one you configured for your organization. For example, if Yasmin works in Europe, enter the European VoIP service information for her account instead of the corporate PBX, which is in North America.

Account Enable	ed 🕑		Default	
SIP(PBX) Account	t Settings			
Sip User Name	yasmin.brown	Sip Display Name	Yasmin Brown	
Sip Authorization Name		Sip Password		
SIP Server Overri	de Settings			
Domain		Proxy		
Voicemail				

6. Click Update User Settings.

The user receives an email from CounterPath with their Bria login information. To see the latest information in the **Bria Users** list, you may need to refresh your browser or click **Refresh** under the **Bria Users** list.

Assigning the Bria for Salesforce permission set

After setting up the PBX/SIP server, users need to be assigned the appropriate Bria permission set.

To assign the Bria permission set

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Setup on the Salesforce user interface header.



3. Search for permission and click Permission Sets.

Q permission	
✓ Users	

 Click either the Bria for Salesforce PermissionSet Administor or the Bria PermissionSet Standard User depending on the permissions you want to assign to users.

N	weil (2)	A B C D E F G H	I J K L M N O P Q R S	5 T U V W X Y Z Other All
	Action	Permission Set Label +	Description	License
	Clone	Bria PermissionSet Administrator	Bria PermissionSet Administrator	Salesforce
	Clone	Bria PermissionSet Standard U	Bria PermissionSet Standard U	Salesforce

5. Click Manage Assignments.



6. Click Add Assignments.

Assigned Users Bria Permission « Back to: Permission Set	S	e	t /	40	dn	niı	nis	st	ra	ato	or														He	elp f	or th	is Page	0
A	В	0		D	E	F	G	ŀ	4	1.	, ji	K	L	М	N	0	P	Q	R	S	Т	U	v	W	X	Y	Z	Other	All
					A	dd	As	sig	Inu	nen	ts	Re	em	ove	Ass	sign	me	nts											

7. Select the users you want to add the permission set to and click Assign.

If you do not see the users you want to add the permission set to, click more.

Vie	W: AI			te New View				Previous Page	
_		A	B C D	E F G H I J K L M N	OPQR	SIT	UVV	W X Y Z	Other A
				Assign Cancel					
	Action	Full Name 🕈	Alias	Username	Last Login	Role	Active	Profile	Manage
1	Edit	845.149	them.	Sen@centered.com		080	~	System Administrator	
1	Edit		-	contemporarens con-	31/01/2018 7:43 PM	oca	~	System Administrator	
	Edit	Inits Josef	biltz	isita Baselmen an	21/12/2017 4:46 PM	650	1	System Administrator	
•	Edit	Constants Mark	10 Sec	microsofeered costeneousin	02/06/2017 3:39 PM		1	System Administrator	
	Edit	Col. Second	locale.	hade Bassaleness com	11/10/2017 6:34 PM	000		System Administrator	

The Bria permission set is assigned to the users.

Installing the Bria Stretto client

Now that the users have been created, users can log in to Salesforce and download the Bria Stretto client. After downloading the client, users need to in to Bria Stretto with the credentials emailed by CounterPath/Stretto.

To install the Bria Stretto client

- 1. Log in to Salesforce.
- 2. Click **Download** in the Bria Sidebar.



- 3. Install and start the Bria Stretto client.
- 4. Log in with the credentials you received by email.

Select both Remember sign in information and Sign in automatically.

Welcome to Bria Stretto! Please sign in using your Bria Strett credentials.	0
aphillips@zippyphone.com	
Remember sign in information	
/ Sign in automatically	
Sign in as invisible	
Sign In	

The Bria for Salesforce add-in is ready to use in Salesforce.

Adding or removing users

When a team gets a new sales representative, the Salesforce admin typically creates a Salesforce account for the person. The newly created Salesforce account appears in the **Bria Users** list. **Enable Bria** for the new user.

When a sales representative leaves the job, the Salesforce admin typically deletes the person's Salesforce account. If the user is deleted from Salesforce, you do not need to do anything in the **Bria Hub**. The Bria subscription ends for the user when the user is deleted from Salesforce.

Suspending users

When you suspend a user from Bria for Salesforce, the user can continue to use Salesforce without the Bria for Salesforce add-in. The user no longer sees the Bria Sidebar within Salesforce and is unable to place call directly from Salesforce. Bria/CounterPath send the user an email when their Bria for Salesforce account is suspended.

To suspend a user from Bria

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click Manage Bria Users.



A list of all Salesforce users appears.

4. Select the user you want to suspend Bria for and click Add/Update User(s).

asmin.brown@demo.com	yasmin.brown@demo.com	✓
Add/Update User(s) Cancel Refresh		

The Settings for username section appears below the list of users.

5. Clear Account Enabled.

Account Enable	ed 🖉		Default	v
SIP(PBX) Account	t Settings			
Sip User Name	yasmin.brown	Sip Display Name	Yasmin Brown	
Sip Authorization Name		Sip Password		
SIP Server Overri	de Settings			
Domain		Proxy		
Voicemail				

6. Click Update User Settings.

The user can no longer use Bria within Salesforce. To see the latest information in the latest information in the user list, you may need to refresh your browser or click **Refresh** under the **Bria Users** list.

Resetting Passwords

End users with Bria for Salesforce typically have three passwords:

- Salesforce password: Password to log in to Salesforce.com
- Bria password: Password to log into the Bria Stretto client

• SIP/PBX password: Password to register to the organization's PBX

Salesforce Password

Changing the Salesforce password does not affect Bria. No extra action is required for the user or the sales administrator in order to continue using Bria for Salesforce.

Bria Password

The password for logging into Bria Stretto clients is generated by the CounterPathStretto server and emailed to the individual end user. If the end user forgets the Bria password, the sales administrator can reset the password.

To reset the Bria password

- 1. Log into Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click Manage Bria Users.



A list of all Salesforce users appears.

4. Select the user you want to reset the password for click Add/Update User(s).



The Settings for username section appears below the list of users.

- 5. Click Reset Bria Login.
- 6. Advise the end user to log in to the Bria Stretto client using the new password.

The Bria login password is reset and the end user receives an email with the new password.

SIP/PBX password

Only change the SIP password when required by your PBX/VoIP provider. If the SIP password is changed, the sales administrator must change the password for the end users from the Bria Admin tab.

To update the SIP/PBX password

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click Manage Bria Users.

Bria for Salesforce Setup	Company Details
Manage Bria Users	
Call Outcome Lists	
Activities	Domain and Admin User Details

A list of all Salesforce users appears.

4. Select the user you want to update the SIP/PBX password for and click Add/Update User(s).



The Settings for username section appears below the list of users.

- 5. Type the new password in SIP Password.
- 6. Click update User Settings.
- 7. Advise the end user to log out of the Bria Stretto client and log back in using their Bria Stretto password, not the new SIP/PBX password.

The SIP/PBX password is updated for the end user.

Note: The SIP/PBX password is not the password the end user enters on the Bria Stretto login screen. End users simply need to log out and log back in to Bria Stretto.

Switching a user to the Lightning experience - Lightning

To switch a user back to the Lightning experience, the Salesforce admin use has to change a user's call center from Bria to BriaLightning. The Bria Sidebar is only available in the either Salesforce Classic or the Lightning experience. Once the Lightning Experience is enabled, you can switch back to Salesforce Classic, but Bria is not available in the view.

After assigning users to the Bria Call Center, the Salesforce admin has to enable **Open CTI softphone** for BriaLightning and assign user profiles that can access BriaLightning.

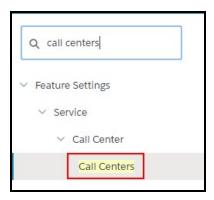
Finally, Open CTI Softphone needs to be added to the Utility Bar.

To change from the Bria to the BriaLightning Call Center

- 1. Log on to Salesforce as a Salesforce admin.
- 2. Click Setup in the Salesforce user interface header.

☆ • • ? •	. 5
A Setup	
Edit Page	

3. Search for call centers in Quick Find and click Call Centers.



4. Click Bria in All Call Centers.

All Ca	all Centers			Help for this Page
				system already in place at your re they can use any Call Center feature
			Import	
Action	Name †	Version	Import Created Date	Last Modified Date
				Last Modified Date 31/10/2017 5:41 PM

5. Click Manage Call Center Users.

Call Center User	rs	Manage Call Center Users	Call Center Users Help 🤶
Call Center Users	s by Profile	•	
Standard User	1		
System Administrator	1		
Total	2		

6. Select the users you want to remove from the Bria Call Center and click **Remove** Users.

		Add M	fore Users Remove Users		
	Full Name	Alias	Username	Role	Profile
•	Kinocoler's Mark	Micas	Interesting the second second second		System Administrator
	PAR. Report	14.05	SCARARY AND ADDRESS COM	010	System Administrator
-	Renero Matt	11204	mercens@cossistence.com	050	System Administrator
	testing user!	1000	veent-Boosinterpath.com	050	System Administrator

7. Click on All Call Centers.



8. Click BriaLightning in All Call Centers.

All Ca	II Centers			Help for this Page
				system already in place at your e they can use any Call Center feature
			Import	
Action	Name +	Version	Import Created Date	Last Modified Date
Action Edit Del				Last Modified Date 31/10/2017 5:41 PM

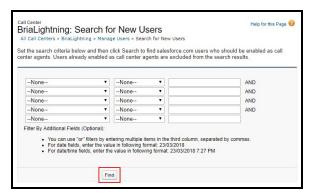
9. Click Manage Call Center Users.

Call Center User	rs	Manage Call Center Users	Call Center Users Help ?
Call Center Users	s by Profile	£	
Standard User	1		
System Administrator	1		
Total	2		

10. Click Add More Users.



11. Either click **Find** or enter search criteria and click **Find**.



Only users that do not have a call center assigned to them appear in the list.

12. Select the users you want to add and click Add to Call Center.

	_		Add to Call Center Cancel		
	Full Name	Alias	Username	Role	Profile
•	Kingender p. Mark	Micas	Interesting the second second second		System Administrator
	PAS. Report	14.16	SCARUE AND ADDRESS OF THE OWNER	010	System Administrator
•	Romero Matt	112104	mercens@cossistence.com	050	System Administrator
	testing user!	1000	user 10 counterpath com	060	System Administrator

The new users show in **Bria: Manage Users**. The users can switch back to the Lightning Experience and use the Bria Sidebar.

	ning: Mana * • BriaLightning *				Help for this Page 🥹
iew: All 🔻 🤇	Create New View				
	ABC	DEFO	G H I J K L M N O P	QRST	UVWXYZOther All
			= 1 = 1 = 1 = 1 = 1 = 1 = 1 = 1 = 1 =		
			Add More Users Remove User	5	
Action	Full Name +		16	Role	Profile
Action	Full Name 🔹		Add More Users Remove Users	-	
Remove	Full Name 🔹	Alias	Add More Users Remove Users	Role	Profile

Enabling Open CTI Softphone

The first time the Salesforce admin switches a user to the BriaLightning call center, the Salesforce admin must also enable **Open CTI Softphone** for BriaLightning and assign user profiles that are able to use the BriaLightning app.

To enable Open CTI Softphone for BriaLightning

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Setup in the Salesforce user interface header.



3. Search for App Manger and click App Manager.

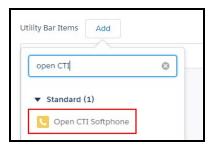
- 4. Click **APP TYPE** to sort apps by the Classic or Lightning experience.
- 5. Select **Edit** in the drop down beside a Lightning Experience App you want to add the Bria Sidebar to. Repeat this step for all of the Lightning Experience Apps where the Bria Sidebar should be available.

~	APP TYPE 🕹 🗸	VISIBLE 🗸	
	Lightning	~	
	Classic	Edit	
	Classic		

6. Click Utility Bar in APP SETTINGS.

APP SETTINGS	
App Details & Branding	
App Options	
Utility Bar	
Select Items	
Assign to User Profiles	

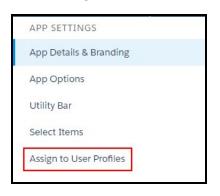
7. Click Add and click Open CTI Softphone.



8. Edit the **Properties** for **Open CIT Softphone**. We also recommend using a **Panel Width** of **210** and a **Panel Height** of **500**.

📞 Bria	PROPERTIES Open CTI Softphone	emove
	▼ Utility Item Properties	
	* Label Bria	0
	Icon	0
	Panel Width	0
	210	
	Panel Height 500	0
	Load in background when app opens	0

- 9. Click Save.
- 10. Click Assign to User Profiles in APP SETTINGS.



 Using Add and Remove, move all profiles you want to give access to BriaLighting to Selected Profiles and move all profiles you do not want to give access to BriaLightning to Available Profiles. Click Back when you are done.

Users that are in both the BriaLightning Call Center and are in one of the **Selected Profiles** can use the Bria Sidebar in the Lightning Experience. Users click **Phone** (or the **Label** you entered) on the Utility Bar to expand and use the softphone.

***	Sales	Home	Opportunities \checkmark	Leads 🗸	Tasks 🗸	Files A
Title		Patel Company Unknown	Phone(2) ▼ €49374	Email		
	~	,	Working - Contac	cted Cic	osed - Not Cor	nvert
_	Bria	CHA	TTER DETAI	LS		
Jeanni 49372 Today	2 4:58 PM	Q 10s	•	Ţ		pand All
Sam P 49374 Today		34s	More Step		up a meeting	ş.
			+ d More Past Acti	vities	To	oday 💌
	_					
C Pho	ne					

Adding more user profiles to Open CTI Softphone

You may want to add more existing user profiles or newly created user profiles to the BriaLightning app. You need to add these user profiles to **Open CTI Softphone**.

To add user profiles to the BriaLightning app

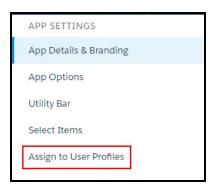
- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Setup in the Salesforce user interface header.

☆ +	?	1	÷.	6
A Setup				
Edit Page				

- 3. Search for App Manger and click App Manager.
- 4. Click **APP TYPE** to sort apps by the Classic or Lightning experience.
- 5. Select **Edit** in the drop down beside the Lightning Experience App you want to add user profiles to.

~	АРР ТҮРЕ ↓	VISIBLE	
	Lightning	~	
	Classic	Edit	1
	Classic		<u> </u>

6. Click Assign to User Profiles in APP SETTINGS.



 Using Add and Remove, move all profiles you want to give access to BriaLighting to Selected Profiles and move all profiles you do not want to give access to BriaLightning to Available Profiles. Click Back when you are done.

The additional user profiles have been assigned to the BriaLightning app. Users that are in both the **BriaLightning Call Center** and are in one of the **Selected Profiles** can use the Bria Sidebar in the Lightning Experience. Users click **Phone** (or the **Label** you entered) to expand and use the softphone.

***	Sales	Home	Opportunities 🗸	Leads 🗸	Tasks 🗸	Files	Acc
×		Patel					10
Title	dillo est	Company Unknown	Phone(2) ♥ €49374	Email	332 - 1111		
	~		Working - Contac	cted Clo	osed - Not Co	nvert	>
_	Bria	CHA	TTER DETAI	LS			
Bria Recen	t Activity	• 🏶 🖪 ៹ م			Cor	npose	
	: 4:58 PM	10s	0	Ţ	C' E	kpand All	
Sam P 49374 Today		34s	More Steps		up a meetin;	g.	100
			d More Past Activ	vities 🔻	т	oday 💌))
📞 Pho	ne						

Switching a user to Salesforce Classic -Lightning

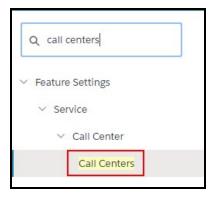
To switch a user back to the Classic experience, the Salesforce admin use has to change a user's call center from BriaLightning to Bria. The Bria Sidebar is only available in the either Salesforce Classic or the Lightning experience. Once Salesforce Classic is enabled, you can switch back to the Lightning Experience, but Bria is not available in the view.

To change from the BriaLightning to the Bria Call Center

- 1. Log on to Salesforce as a Salesforce admin.
- 2. Click **Setup** in the Salesforce user interface header.



3. Search for call centers in Quick Find and click Call Centers.



4. Click BriaLightning in All Call Centers.

All Ca	Il Centers			Help for this Page
				system already in place at your e they can use any Call Center featur
			Import	
Action	Name †	Version	Import Created Date	Last Modified Date
Action Edit Del	Name ↑ Bria			Last Modified Date 31/10/2017 5:41 PM

5. Click Manage Call Center Users.



6. Select the users you want to remove from the BriaLightning Call Center and click **Remove Users**.

	-	Add M	fore Users Remove Users		
	Full Name	Alias	Username	Role	Profile
	Kingender 3. Marti	Micas	Interesting the second second second		System Administrator
	PAS, Report	14.05	SCARUBA AND ADDRESS OF THE SCARUBAL COSTS	010	System Administrator
•	Speep Matt	11204	mercens@cossilearre.com	050	System Administrator
	testing point	stept	veent-Boownie reath com	050	System Administrator

7. Click on All Call Centers.



8. Click Bria in All Call Centers.



9. Click Manage Call Center Users.

Call Center User	s	Manage Call Center Users	Call Center Users Help ?
Call Center Users	s by Profile	•	
Standard User	1		
System Administrator	1		
Total	2		

10. Click Add More Users.



11. Either click **Find** or enter search criteria and click **Find**.

Call Centers » BriaLig	ghtning » Manag elow and then «	OF New Users ge Users » Search for New Users click Search to find salesforce.com is call center agents are excluded f	users who should be enabled as call from the search results.
None	•	None V	AND
None	۲	None V	AND
None	۲	None V	AND
None	۲	None V	AND
None	•	None 🔻	
 For date field 	"or" filters by en ds, enter the valu	tering multiple items in the third colurn ze in following format: 23/03/2018 e value in following format: 23/03/2018	

Only users that do not have a call center assigned to them appear in the list.

12. Select the users you want to add and click Add to Call Center.

			Add to Call Center Cancel		
	Full Name	Alias	Username	Role	Profile
•	Kingender 3. Marti	Micas	Interpretation and and and		System Administrator
	PAS, Report	14.16	SCARUE AND REAL OF T	010	System Administrator
•	Speep Matt	112104	mercens@cossileant.com	050	System Administrator
	testing, part	1000	seent-Boownergeth.com	090	System Administrator

The new users show in **Bria: Manage Users**. The users can switch back to Salesforce Classic and use the Bria Sidebar.

	Call Centers	nage Users s » Bria » Manage				Help for this Page <table-cell></table-cell>
lew:	All 🔻 🤇	Create New View	DEF	G H I J K L M N O P (UVWXYZ Other AI
_			[Add More Users Remove Users		
	Action	Full Name +	Alias	Add More Users Remove Users Username	Role	Profile
	Action	Full Name 🔹			Role CEO	Profile System Administrator
	Remove	Full Name 🔹	Alias	Username		

Customizing Bria for Salesforce - Lightning

Bria for Salesforce offers various options that can be customized for the end user.

- Call outcome lists
- Email templates
- Call recording preferences
- Follow-up preferences
- DTMF dial scripts

- Bria visibility
- Quick transfer

The sales administrator is responsible for configuring call outcome lists and email templates. End users pick an outcome list and may pick an email template from the ones configured by the sales administrator. For the remainder of end user customizable options, see the Bria for Salesforce User Guide.

Call outcome lists

The Bria Sidebar has a field that the sales representative populates during or after a call to capture the result of the call.

This information is logged in reports and if populated correctly, it can make reports more powerful and meaningful to your business.

The sales administrator can predefine outcome lists and options for a group. The sales administrator can assign one list for sales representatives according to their role when enabling Bria. End users can switch between lists but they cannot change the options within the list.

To customize a Call Outcome List

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click **Call Outcome lists**. Existing call outcomes and the details of each list are displayed.

	Bria Hub Support			
Bria for Salesforce Setup Manage Bria Users	Call Outcome List Ma	nagem	ent	
Call Outcome Lists Activities				
	Cati Outcome List Default Inbound Lead Outcomes Opportunky Updates Sales Development Outcomes	, ,	List Detail # Not Working Call Successful Do Not Call Left Voice Mail	*

Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

- 4. Click the **Call Outcome List** that you want to modify. The options for the list update in **List Detail**.
- 5. To add a new item to the List Detail, type it in the field below List Detail and click
 +.



To delete an item from the List Detail, click the item in the list to select it and click -.

		List Detail	
Sales Development Outcomes	*	Call Outcome in Notes	
Default		Contact Evasive	
Inbound Lead Outcomes		Contact Supportive	
Opportunity Updates		Left Voice Mail	
	*		

The Call Outcome List is updated.

To add a Call Outcome List

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click **Call Outcome lists**. Existing call outcomes and the details of each list are displayed.

	Bria Hub Support			
Bria for Salesforce Setup Manage Bria Users	Call Outcome List M	anagem	ent	
Call Outcome Lists Activities	Call Outcome List		List Detail	
	Default Inbound Lead Outcomes Opportunity Updates Sales Development Outcomes	*	# Not Working Call Successful Do Not Call Left Voice Mail	Î

Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

4. Click **Call Outcome lists**. Existing Call Outcome Lists and the List Details are displayed.

	Bria Hub Support			
Bria for Salesforce Setup Manage Bria Users	Call Outcome List Mar	nagem	ent	
Call Outcome Lists Activities				
	Call Outcome List Default Inbound Lead Outcomes Opportunity Updates Sales Development Outcomes		List Detail # Not Working Call Successful Do Not Call Left Voice Mail	

Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

5. Type the name for the new list below Call Outcome List and click +.

III Outcome List		List Detail	
Sales Development Outcomes Default Inbound Lead Outcomes Opportunity Updates		Call Outcome in Notes Contact Evasive Contact Supportive Left Voice Mail	_
	-		

6. Add a new outcomes to the List Detail by typing the outcome it in the field below List Detail and click +.

all Outcome List		List Detail	
Default Inbound Lead Outcomes Marketing Team Outcomes Opportunity Updates Sales Development Outcomes	-		í
	-		

The Call Outcome List and each List Detail are added.

To delete a Call Outcome List

- 1. Log in to Salesforce as an Salesforce admin.
- 2. Click Bria Admin.

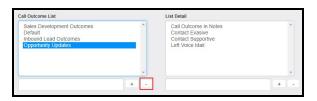


The Bria Hub opens.

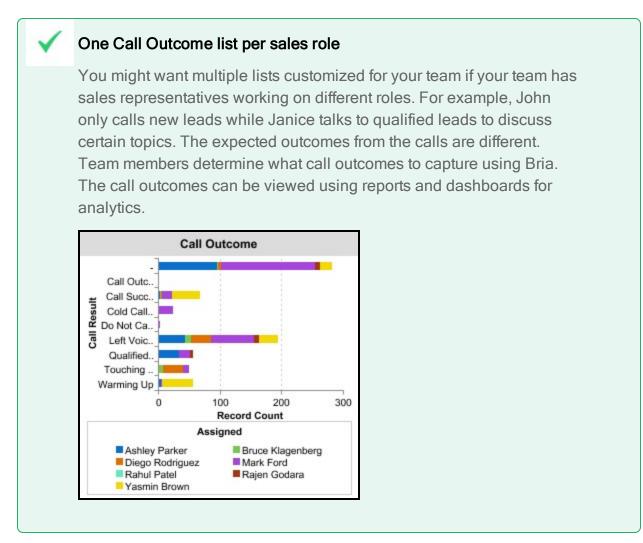
3. Click **Bria for Salesforce Setup**. Existing call outcomes and the details of each list are displayed.

	Bria Hub Support			
Bria for Salesforce Setup Manage Bria Users	Call Outcome List M	lanagem	ent	
Call Outcome Lists				
Activities	Call Outcome List		List Detail	
	Default Inbound Lead Outcomes Opportunity Updates Sales Development Outcomes	*	# Not Working Call Successful Do Not Call Left Voice Mail	•
		v		w
		• •		

4. Click the Call Outcome List you want to delete and click -.



The Call Outcome List is deleted.



Email templates

The Bria Sidebar offers one-click follow-up buttons for emailing a contact or a lead. The default email template is customizable by both the Salesforce admin and each

Salesforce user.

The Bria Email Templates folder

A new email folder is created after you install the Bria package to your Salesforce setup. The Bria email folder contains a few predefined email templates. You can customize the existing predefined templates or you can add new email templates.

Make sure there is at least one template available for use in the Bria email folder. The templates available for use are shown as options for each sales representative.

To manage Bria Email Templates

- 1. Log into Salesforce as a Salesforce admin.
- 2. Click Setup on the Salesforce user interface header.

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A Setup	1111121 C
Edit Page	Saurr ,

3. Search for email templates and click Email Templates.

(Q email templates	
~	Email	
	Email Templates	

4. Click **New Template**, **Edit**, or **Del** and edit the template using the standard Salesforce procedures to create, edit, or delete email templates.

Folder Bria	Email Templates	 Edit Creat 	e New Folder	
	A B C D E F G	H I J K L	M N O P Q	RSTU
		New Template		
Action	Email Template Name 🛧	Template Type	Available For Use	Description
Edit Del	Sales Presentation	Text		
Edit Del	<u>Sales: New Customer</u> Email	Text	✓	Email to new customers

The Bria Email Templates folder is updated with the changes you made.

Activities and call logs - Lightning

A call made with Bria is logged as a task in Salesforce. A call log appears in:

- The Activity section in various Salesforce pages such as Contacts, Leads, Accounts, and Opportunities.
- The Activities list in the Bria Admin tab.
- Reports and dashboards

Activity History for a particular Contact/Lead/Account/Opportunity

The Activity History section provides all the calls made for that particular person.

Activity I	listory		Log	a Call Mail I	Merge Send an Email	View All			Activity	History Help
Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time	Call Duration	Call Result	Call Type	Time Initiated	Timestamp
Edit Del	Outbound - (604) 555- 9371	1	10/27/2015	Yasmin B	10/28/2015 10:10 AM	16	Left Voice Mail	Outbound	1444793323	10/27/2015 8:14 AM
Edit Del	Outbound - 7785555580	1	10/13/2015	Yasmin B	10/27/2015 8:01 AM	65	None	Outbound	1444763323	10/13/2015 12:08 PM
Edit Del	Inbound - +17785555580	1	10/9/2015	Yasmin B	10/27/2015 8:01 AM	200		Inbound	1442955960	10/9/2015 4 PM
Edit Del	Outbound - 7785559371	1	10/2/2015	<u>Yasmin B</u>	10/9/2015 3:50 PM	160		Outbound	1442859969	10/2/2015 10:47 AM
Edit Del	Outbound - +17785559371	1	9/23/2015	Yasmin B	9/23/2015 3:36 PM	16	None	Outbound	1442856966	9/23/2015 3: PM
Edit Del	Inbound - +17785559371	1	9/21/2015	Yasmin B	9/21/2015 10:20 AM	20		Inbound	1442855960	9/21/2015 10:19 AM

Activity History for your team

You can view a list of call-related activities for your entire team rather than just for a specified sales representative.

To view team call-related activities

1. Log in to Salesforce as an Salesforce admin.

2. Click Bria Admin.



The Bria Hub opens.

3. Click Activities. A list of all Salesforce users appears.

Bria for Salesforce Setup	O D I I
Manage Bria Users	Company Details
Call Outcome Lists	
Activities	Domain and Admin User Details

- 4. Use the standard Salesforce procedures to filter, view, edit, and delete activities.
- 5. Click Update.

The Bria Hub shows a list of Activities.

Reports and dashboards - Lightning

CounterPath provides various reports and dashboards. It is up to your organization to determine who can access which reports and dashboards.

To view reports and dashboards

- 1. Click Reports or Dashboards on Salesforce menu.
- 2. Click on the Bria report or dashboard file or folder you want to view.

Reports All Folders 3 items - Sorted by Fold	der Name			New Report
REPORTS	FOLDER NAME	CREATED BY	LAST MODIFIED BY	CREATED ON
Recent	Bria Reports	And the second second	Jurge-Webs	31/10/2017 5:41 PM
Created by Me	Dashboard	Jurga Salatas	large blanc	31/10/2017 5:41 PM
Private Reports	Sales KPI Dashboard	.cope to tota	Jungs- States	31/10/2017 5:41 PM
Public Reports				
All Reports				
FOLDERS				
Created by Me				
Shared with Me				
All Folders				

The selected folder or file is displayed.

Custom Reports

In the Salesforce Report Builder, you can customize existing reports or create new ones. Most data captured by Bria can be found under the following sections:

- Activity Information
- Leads
- Contacts
- Opportunities
- Accounts

Captured call data

Bria captures various call-related information and integrates it in Salesforce.com for reports. The following is an overview of the data captures by Bria.

For each call:

- Call type: Whether a call is inbound or outbound
- Caller and Callee
- Phone number
- Call duration (in seconds)
- Time of day the call is made
- Call outcome: Populated by each sales representative using the Bria Side Bar
- Comments: Populated by each sales representative using the Bria Side Bar

For each contact or lead

- First time and last time the person was contacted using Bria
- Total number of inbound and outbound calls
- Total talk time using Bria
- Time to respond to lead: The time between when a lead is created in Salesforce and the lead is contacted for the first time using Bria

Note: Editing a dashboard that was created in Salesforce Classic will turn it into a Lightning Experience dashboard. Users will not longer be able to edit the dashboard in Salesforce Classic.

Salesforce Classic

You can use Bria for Salesforce in Salesforce Classic or in the Lightning Experience. This section describes the Bria for Salesforce administration tasks using Bria for Salesforce in Salesforce Classic.

To learn how to administer Bria for Salesforce in the Lightning experience, see The Lightning Experience.

Salesforce Classic topics

Configuring Bria for Salesforce Managing Bria users Switching a user to the Lightning experience Switching a user to Salesforce Classic Customizing Bria for Salesforce Activities and call logs Reports and Dashboards

Configuring Bria for Salesforce - Classic

Initial configuration

To complete the initial Bria for Salesforce configuration, you must be a Salesforce admin.

The initial configuration consists of the following steps:

- 1. Admin: Install the Bria for Salesforce package from the Salesforce AppExchange[®].
- 2. Admin: Assign available Bria for Salesforce licenses to Salesforce users.

- 3. Admin: Configure your organization's PBX in the Bria Admin page in Salesforce.
- 4. Admin: Enable users to use the Bria for Salesforce add-in. This step creates a Bria Stretto login account. Bria Stretto/CounterPath send users an email with their Bria Stretto login credentials.
- 5. Admin: Assign the Bria for Salesforce permission set to users.
- 6. Users: Log in to Bria Stretto and Salesforce.

Information required

Information about your PBX/SIP service is required for the initial configuration. If you are not familiar with PBX/SIP services, talk to your IT department to obtain the required information.

Alternatively, you can email the IT personnel during configuration and they can complete the PBX/SIP service set up.

The following information is required for your PBX/SIP server:

- SIP domain
- Proxy
- Voicemail number
- Your SIP username, password, and authorization name (if used by the SIP server)

Installing the Bria for Salesforce package

The Bria for Salesforce package is found on the Salesforce AppExchange.

To download the Bria for Salesforce package

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Select **AppExchange** from the drop-down menu in the Salesforce user interface header.



3. Search for Bria.

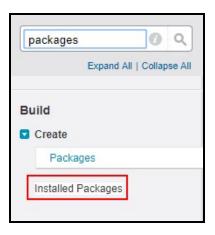
- 4. Click Get It Now.
- 5. Follow the prompts to install Bria. Choose the Install for All Users option.

Assigning Bria for Salesforce licenses

Before Salesforce you can use the Bria for Salesforce add-in, they need to have a Bria for Salesforce license assigned.

To assign a Bria for Salesforce license

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click **Setup** on the Salesforce user interface header.
- 3. Search for packages and click Installed Packages.



4. Click Manage Licenses for the BriaForSalesforce package.



5. Click Add Users.

ackage Details BriaForSales			Help for this Page 🥝
Back to Previous Pag Package Name	BriaForSalesforce	Publisher	CounterPath Corporation
Status	Active	Allowed Licenses	20
Expiration Date	14/11/2018	Used Licenses	14
	ABCDEFGH	H I J K L M N O P Q	R S T U V W X Y Z Other Al
Licensed Users	Add Users	Remove Multiple Users	
Action Full Name	1	Role Active P	rofile

A list of Available Users appears.

6. Select your user.

If you do not see your user in the list, click more.

Action	Full Name 🕇	Role	Active	Profile	
•	Iside, Jorge	050	1	System Administrator	
•	Klapenberg, Mark		~	System Administrator	
	Pak, Kenny	CBO		System Administrator	
•	Ratimat, Faltim	080	1	System Administrator	
	Fingers, Matt	030		System Administrator	

Your user shows in the Selected Users list.

7. Click Add.

Selec	cted Users	
Action	Full Name	
	ksiden, Jangas	
•	Kagamberg, Illani:	
1	Rehmal, Rahim	

You have a Bria for Salesforce license assigned to them.

Configuring your PBX/SIP server

After installing Bria for Salesforce, set up Bria for Salesforce so that it can connect with your PBX/SIP server.

To configure your PBX/SIP server

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click + and click Bria Admin.

Home	
Search Search All Got Limit to items I own Advanced Search	All Tabs Use the links below to quickly navigate to a tab. Alternatively, View: All Tabs
Create New 🔻	Vaccounts
Recent Items	Mini Assets
No records to display	Stria Admin
😨 Recycle Bin	by <u>Campaigns</u> Tell me morel

The Bria Hub opens.

3. Complete the Company Details.

Bria for Salesforce Setup	Compan	y Details		
Manage Users		,		
Call Outcome Lists				
Activities	Domain and	Admin User Deta	ails	
	Company Name	CounterPath Corpor	Admin User Name	admin@506demo.ci
	Domain	506demo.com	Email	ynicholson@counter
	To get started, f	first register your company's at consist of only alphanumer	domain. Your St	retto domain must be

- Company Name: Populated from Salesforce.
- Domain: The domain for Bria Stretto login. Typically, your organization's domain used for email, such as counterpath.com from yasmin.brown@counterpath.com. Keep it short all end users need to enter this domain name when logging into the Bria Stretto client. The domain name must be unique in the Stretto server hosted by CounterPath; your value will not be accepted if other organizations already use the domain name.
- Bria Group Administrator ID: Generated by CounterPath for your organization. This is a group account that can be shared by all administrators in your organization. This account may be used later for accessing Stretto.

- Bria Group Email: An email address for the group admin account at your organization. CounterPath emails this address when the group admin access to Stretto is available.
- 4. Configure your PBX settings.

If you are not familiar with the PBX configuration, choose **No** and enter an email address of the Telecom administrator in your organization. The Telecom administrator receives an email with a link to populate PBX configurations.

- **Domain**: This is the SIP domain for your PBX/SIP service provider such as Asterisk or Broadworks.
- **Proxy**: Outbound proxy for SIP traffic. The value can be a host name or an IP address. A port number can be added after a colon (:) such as aaavoipprovider.com:5070.
- Voicemail: A number to listen to voicemail, such as 600.

re you the Telecom Administrator?		SIP Server Settings
Yes No	Domain	aaavoipprovider.com
	Proxy	
	Voicemail	600

5. Click Update.

The Adding First Bria user screen appears.

Adding the first Bria user

Once you have configured Bria to connect with your PBX, you can add your first Bria user - you.

To add the first Bria user

1. Select **Account Enabled** to start subscribing to Bria. When you enable this option, a Bria Stretto account is created for you.

Account Enable	4 -			
Account Enable	d 🖉		Default	•
SIP(PBX) Account	Settings			
Sip User Name	Yasmin.Brown	Sip Display Name		
Sip Authorization Name		Sip Password		
Recording Settings				
Display Recording Feature		Recording Folder		

- 2. Fill out the SIP(PBX) Account Settings:
 - Sip User Name: A username for the SIP service. Typically the username portion of the SIP account (Yasmin.Brown from Yasmin.Brown@aaavoipprovider.com)
 - **Sip Authorization Name**: Provide this information only if your SIP server requires it. Typically, each user has a unique authorization name.
 - Sip Display Name: The name that appears on caller ID when you make a Bria call. The display name is determined by you.
 - Password: A password to register to the SIP server. This is typically provided by your VoIP provider.
- 3. Click Update User Settings.

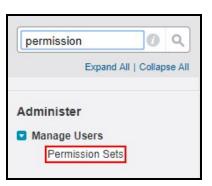
An email is sent with your Bria credentials from Bria/CounterPath to the email account associated with Salesforce.

Assigning the Bria for Salesforce permission set

After setting up the PBX/SIP server, you need to be assigned the appropriate Bria permission set.

To assign the Bria permission set

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click **Setup** on the Salesforce user interface header.
- 3. Search for permission and click Permission Sets.



4. Click Bria for Salesforce PermissionSet Administor.



5. Click Manage Assignments.



6. Click Add Assignments.



7. Select your user and click Assign.

If you do not see your user, click more.

View	V: AJ			te New View				Previous Page	
		A	BICID	Assign Cancel	NOPQR	SIT	UIVI	W X Y Z	Other
	Action	Full Name †	Alias	Username	Last Login	Role	Active	Profile	Manag
•	Edit	in the	iter (And Contrast Line		CEO	~	System Administrator	
	Edit	idea.dean	inter-	training in succession of the	21/12/2017 4:46 PM	CEO	1	System Administrator	
	Edit	Second.	1004	state tests attests	02/06/2017 3:39 PM		1	System Administrator	
	Edit	Sectorial Sector	COM-	Notation & Longo of	02/03/2018 12:14 PM	CEO	1	System Administrator	
	Edit	Contractory	10.0	NO COMPOSION	11/10/2017 6:34 PM	CEO		System Administrator	

The Bria permission set is assigned to you.

Installing the Bria Stretto client

Now that your user has been created, you can log in to Salesforce and download the Bria Stretto client. After downloading the client, log in to Bria Stretto with the credentials emailed by CounterPath/Stretto.

To install the Bria Stretto client

- 1. Log in to Salesforce.
- 2. Click **Download** in the Bria Sidebar.



- 3. Install and start the Bria Stretto client.
- 4. Log in with the credentials you received by email.

Select both Remember sign in information and Sign in automatically.

Please sign	in using your Bria Stretto credentials.
aphillips@zippy	phone.com
•••••	
✓ Remember si	gn in information
 Sign in autor 	natically
Sign in as inv	isible
	Sign In

The Bria for Salesforce add-in is ready to use in Salesforce.

Tip: Add the Bria Admin tab to your default display for easier access.

Managing Bria users - Classic

The Salesforce admin needs to enable Bria for Salesforce and add the PBX/SIP credentials for each Salesforce user. Once Bria for Salesforce is enabled for the user, a Bria Stretto account is automatically created by CounterPath and the Bria Stretto credentials are sent to the user via email. The user logs into the Bria Stretto client and the Bria Stretto client registers with the PBX.

Enabling Bria for Salesforce incurs the subscription fee for each user. As an Salesforce admin, you can suspend a user if the user no longer need to use Bria for Salesforce. When a user is suspended from Bria for Salesforce, the user can continue to use Salesforce without the Bria for Salesforce add-in.

Bria User Configuration

You can review the list of Salesforce users and see whether they are active Bria users. You can enable or suspend Bria for Salesforce for a user, as well as reset their Bria Stretto password from the users list.

Bria User Configuration fields

Salesforce User Name: Read only. This field is populated by Salesforce. If a team member is not listed here, the user probably has not been added to Salesforce. Add the user to Salesforce the usual way, and then come back to this page.

Bria Login: The login username for Bria Stretto clients. This field is empty until Bria is enabled for the user. Once the Bria user has been enabled, CounterPath creates the username and password.

Active Bria User: If this field is empty, Bria has not been enabled for the user or Bria has been suspended for the user. If this field is selected, Bria is enabled for this user.

	Rita Hub Support			
Bria for Salesforce Setup	Bria User Configura	ation		
Manage Bria Users				
Call Outcome Lists				
Activities				
	Salesforce Admin Users •			*
Active Bria user	Salesforce User Name	Bria Login	Active Bris User	
Active bits user	atomar@demo.com	-> alomar@demo.com	1	
Bria bas never been	inathevs@demo.com	>		
enabled for this user	mklagenberg@derso.com	milagenberg@demo.com	1	
	😑 kjones@demo.com	> Njones@demo.com		
Suspended Bria user	10rcma@demo.com	yasmin brown @dema.com	1	-

Enabling Bria for users

In order for Salesforce users to use Bria for Salesforce, Bria for Salesforce has to be enabled for the user.

User configuration consists of the following steps:

- 1. Admin: Assign available Bria for Salesforce licenses to Salesforce users.
- 2. Admin: Enable users to use the Bria for Salesforce add-in. This step creates a Bria Stretto login account. Bria Stretto/CounterPath send users an email with their Bria Stretto login credentials.
- 3. Admin: Assign the Bria for Salesforce permission set to users.
- 4. Users: Log in to Bria Stretto and Salesforce.

Information required

For each user, the following information is required:

• The SIP username, password, and authorization name (if used by the SIP server)

Assigning Bria for Salesforce licenses

Before Salesforce users can use the Bria for Salesforce add-in, they need to have a Bria for Salesforce license assigned.

To assign a Bria for Salesforce license

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Setup on the Salesforce user interface header.
- 3. Search for packages and click Installed Packages.

packages	0 2
Expa	nd All Collapse All
Build	
Create	
Packages	
Installed Packag	les
5	

4. Click Manage Licenses for the BriaForSalesforce package.

Installed Packages	
Action	Package Name
Uninstall Manage Licenses 📥	BriaForSalesforce

5. Click Add Users.

Package Details BriaForSales Back to Previous Pag			Help for this Page 🥝
Package Name	BriaForSalesforce	Publisher	CounterPath Corporation
Status	Active	Allowed Licenses	20
Expiration Date	14/11/2018	Used Licenses	14
	ABCDEFGHI	J K L M N O P Q	R S T U V W X Y Z Other A
Licensed Users	Add Users R	emove Multiple Users	
Action Full Name	†	Role Active P	rofile

A list of **Available Users** appears.

6. Select the users you want to add the Bria for Salesforce license to.

If you do not see the user you want in the list, click more.

Action	Full Name +	Role	Active	Profile	
	Iniche, Jonge	050	~	System Administrator	
•	Klapenberg, Mark		~	System Administrator	
	Pak, Kenny	080		System Administrator	
	Ratimat, Faitim	060	1	System Administrator	
	Fingers, Met	030		System Administrator	

The selected users show in the Selected Users list.

7. Click Add.

Action	Full Name
1	laiden, Jorga
1	Reparitory, Hark
-	Rehmal, Bahim

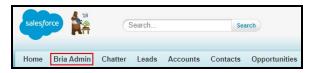
The Salesforce users have a Bria for Salesforce license assigned to them.

Adding Bria users

After you assign a license to a user, you can add them as a Bria user.

To add Bria for a user

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click Manage Bria Users.

Bria for Salesforce Setup	Company Details
Manage Bria Users	
Call Outcome Lists	
Activities	Domain and Admin User Details

A list of all Salesforce users appears.

4. Select the user you want to enable Bria for and click Add/Update User(s).

asmin.brown@	demo.com	yasmin.brown@demo.com	✓	
Add/Update User(s)	Cancel Refresh			

The Settings for username section appears below the list of users.

- 5. Fill out the user's settings.
 - Account Enabled: Select to start subscribing to Bria for this user. A Bria account is created for the user.
 - Call Outcome list: Use the drop-down list to choose the default list for call outcome options for the user. End users can update their User Settings to change the default list for call outcomes as well. See Customizing Bria for Salesforce for more information on configuring Call Outcome options.
 - SIP(PBX) Account Settings: The SIP information for each user. If you are unfamiliar with SIP, get the information from the IT support.
 - Sip User Name: A username for the SIP service. Typically the username portion of the SIP account (Yasmin.Brown from Yasmin.Brown@aaavoipprovider.com)
 - Sip Authorization Name: Provide this information only if your SIP server requires it. Typically, each user has a unique authorization name.
 - **Sip Display Name**: The name that appears on caller ID when you make a Bria call. The display name is determined by you.
 - **Password**: A password to register to the SIP server. This is typically provided by your VoIP provider.
 - SIP Server Override Settings: Complete this section if you want to assign a different SIP account than the one you configured for your organization. For example, if Yasmin works in Europe, enter the European VoIP service

information for her account instead of the corporate PBX, which is in North America.

Account Enabled			Default
SIP(PBX) Account	Settings		
Sip User Name	yasmin.brown	Sip Display Name	Yasmin Brown
Sip Authorization Name		Sip Password	
SIP Server Overrid	le Settings		
Domain		Proxy	
Voicemail			

6. Click Update User Settings.

The user receives an email from CounterPath with their Bria login information. To see the latest information in the **Bria Users** list, you may need to refresh your browser or click **Refresh** under the **Bria Users** list.

Assigning the Bria for Salesforce permission set

After setting up the PBX/SIP server, users need to be assigned the appropriate Bria permission set.

To assign the Bria permission set

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Setup on the Salesforce user interface header.
- 3. Search for permission and click Permission Sets.

permission	0	Q
Expan	d All Colla	pse A
Administer		
Manage Users		
Permission Se	ets	

4. Click either the Bria for Salesforce PermissionSet Administor or the Bria PermissionSet Standard User depending on the permissions you want to assign to users.

New	ABCDEFGH	I J K L M N O P Q R S	T U V W X Y Z Other All
Action	Permission Set Label +	Description	License
Clone	Bria PermissionSet Administrator	Bria PermissionSet Administrator	Salesforce
Clone	Bria PermissionSet Standard U	Bria PermissionSet Standard U	Salesforce

5. Click Manage Assignments.



6. Click Add Assignments.



7. Select the users you want to add the permission set to and click Assign.

If you do not see the users you want to add the permission set to, click more.

Vie	W: AI			te New View				Previous Page	
-		A	B C D	Assign Cancel	O P Q R	SITI	UVV	w x y z	Other A
	Action	Full Name 🕈	Alias	Username	Last Login	Role	Active	Profile	Manage
1	Edit	845.1/2	then:	Kein@parateinens.com		010	~	System Administrator	
1	Edit		-	CANAL DISTANCE OF	31/01/2018 7:43 PM	050	~	System Administrator	
	Edit	inite June	biltz	isin Brestmen and	21/12/2017 4:46 PM	650	1	System Administrator	
•	Edit	Keentero. Mark	1000	max one extension of the extension	02/06/2017 3:39 PM		~	System Administrator	
	Edit	Col. Second	lonale.	teatrific analysis and	11/10/2017 6:34 PM	980		System Administrator	

The Bria permission set is assigned to the users.

Installing the Bria Stretto client

Now that the users have been created, users can log in to Salesforce and download the Bria Stretto client. After downloading the client, users need to in to Bria Stretto with the credentials emailed by CounterPath/Stretto.

To install the Bria Stretto client

- 1. Log in to Salesforce.
- 2. Click **Download** in the Bria Sidebar.



- 3. Install and start the Bria Stretto client.
- 4. Log in with the credentials you received by email.

Select both Remember sign in information and Sign in automatically.

Welcome to Bria Stretto! Please sign in using your Bria Stretto credentials.	D
ohillips@zippyphone.com	
••••	
Remember sign in information	
Sign in automatically	
Sign in as invisible	
Sign In	

The Bria for Salesforce add-in is ready to use in Salesforce.

Adding or removing users

When a team gets a new sales representative, the Salesforce admin typically creates a Salesforce account for the person. The newly created Salesforce account appears in the **Bria Users** list. **Enable Bria** for the new user.

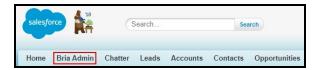
When a sales representative leaves the job, the Salesforce admin typically deletes the person's Salesforce account. If the user is deleted from Salesforce, you do not need to do anything in the **Bria Hub**. The Bria subscription ends for the user when the user is deleted from Salesforce.

Suspending users

When you suspend a user from Bria for Salesforce, the user can continue to use Salesforce without the Bria for Salesforce add-in. The user no longer sees the Bria Sidebar within Salesforce and is unable to place call directly from Salesforce. Bria/CounterPath send the user an email when their Bria for Salesforce account is suspended.

To suspend a user from Bria

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click Manage Bria Users.

Bria for Salesforce Setup Manage Bria Users	Company Details
Call Outcome Lists	
Activities	Domain and Admin User Details

A list of all Salesforce users appears.

4. Select the user you want to suspend Bria for and click Add/Update User(s).



The Settings for username section appears below the list of users.

5. Clear Account Enabled.

Account Enable	d 🖉		Default	٧
SIP(PBX) Account	t Settings			
Sip User Name	yasmin.brown	Sip Display Name	Yasmin Brown	
Sip Authorization Name		Sip Password		
SIP Server Overri	de Settings			
Domain		Proxy		
Voicemail				

6. Click Update User Settings.

The user can no longer use Bria within Salesforce. To see the latest information in the latest information in the user list, you may need to refresh your browser or click **Refresh** under the **Bria Users** list.

Resetting Passwords

End users with Bria for Salesforce typically have three passwords:

- Salesforce password: Password to log in to Salesforce.com
- Bria password: Password to log into the Bria Stretto client
- SIP/PBX password: Password to register to the organization's PBX

Salesforce Password

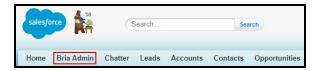
Changing the Salesforce password does not affect Bria. No extra action is required for the user or the sales administrator in order to continue using Bria for Salesforce.

Bria Password

The password for logging into Bria Stretto clients is generated by the CounterPathStretto server and emailed to the individual end user. If the end user forgets the Bria password, the sales administrator can reset the password.

To reset the Bria password

- 1. Log into Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click Manage Bria Users.



A list of all Salesforce users appears.

4. Select the user you want to reset the password for click Add/Update User(s).

asmin.brown@	demo.com	yasmin.brown@demo.com	✓	
Add/Update User(s)	Cancel Refresh			

The Settings for username section appears below the list of users.

- 5. Click Reset Bria Login.
- 6. Advise the end user to log in to the Bria Stretto client using the new password.

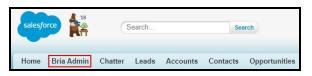
The Bria login password is reset and the end user receives an email with the new password.

SIP/PBX password

Only change the SIP password when required by your PBX/VoIP provider. If the SIP password is changed, the sales administrator must change the password for the end users from the Bria Admin tab.

To update the SIP/PBX password

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click Manage Bria Users.



A list of all Salesforce users appears.

4. Select the user you want to update the SIP/PBX password for and click Add/Update User(s).



The Settings for username section appears below the list of users.

- 5. Type the new password in SIP Password.
- 6. Click update User Settings.
- 7. Advise the end user to log out of the Bria Stretto client and log back in using their Bria Stretto password, not the new SIP/PBX password.

The SIP/PBX password is updated for the end user.

Note: The SIP/PBX password is not the password the end user enters on the Bria Stretto login screen. End users simply need to log out and log back in to Bria Stretto.

Switching a user to the Lightning experience - Classic

To switch a user back to the Lightning experience, the Salesforce admin use has to change a user's call center from Bria to BriaLightning. The Bria Sidebar is only available in the either Salesforce Classic or the Lightning experience. Once the Lightning Experience is enabled, you can switch back to Salesforce Classic, but Bria is not available in the view.

After assigning users to the Bria Call Center, the Salesforce admin has to enable **Open CTI softphone** for BriaLightning and assign user profiles that can access BriaLightning.

Finally, Open CTI Softphone needs to be added to the Utility Bar.

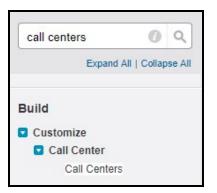
To change from the Bria to the BriaLightning Call Center

1. Log on to Salesforce as a Salesforce admin.

2. Click Setup in the Salesforce user interface header.



3. Search for call centers in Quick Find / Search and click Call Centers.



4. Click Bria in All Call Centers.



5. Click Manage Call Center Users.

Call Center User	Manage	e Call Center Users	Call Center Users Help ?
Call Center Users	by Profile		
Standard User	1		
System Administrator	1		
Total	2		

6. Select the users you want to remove from the Bria Call Center and click **Remove** Users.

	-	Add M	fore Users Remove Users		
	Full Name	Alias	Username	Role	Profile
1	Kingender p. Mark	Michael	modernetworkersenetwork.com		System Administrator
	PAS. Report	14.16	SCARUBICAUGAREMENTAL COSTS	010	System Administrator
•	Romero Matt	112104	mercens@cossilearre.com	050	System Administrator
	testing user!	1000	user hit counterpath, com	950	System Administrator

7. Click on All Call Centers.



8. Click BriaLightning in All Call Centers.

II Ca	II Centers			Help for this Page
) system already in place at your vre they can use any Call Center feature:
			Import	
Action	Name †	Version	Import Created Date	Last Modified Date
Action Edit Del				Last Modified Date 31/10/2017 5:41 PM

9. Click Manage Call Center Users.

Call Center Users		Manage Call Center Users	Call Center Users Help (
Call Center Users	s by Profile			
Standard User	1			
System Administrator	1			
Total	2			

10. Click Add More Users.



11. Either click **Find** or enter search criteria and click **Find**.

		or New Users ge Users » Search for New Users	Help for this Page
		click Search to find salesforce.com use is call center agents are excluded from	
None	•	None V	AND
None	•	None V	AND
None	۲	None V	AND
None		None V	AND
None	•	None V	
 For date field 	"or" filters by er is, enter the valu	tering multiple items in the third column, s ie in following format: 23/03/2018 e value in following format: 23/03/2018 7:2	
	Fir	d	

Only users that do not have a call center assigned to them appear in the list.

12. Select the users you want to add and click Add to Call Center.

Add to Call Center						
	Full Name	Alias	Username	Role	Profile	
•	Kiepenkerp Mark	Micasi	middoenterschooldereng.com		System Administrator	
	PAR. Report	1446	SCARARY AGAIN AND A COM	010	System Administrator	
•	Speep Matt	11204	mercens@cossileant.com	050	System Administrator	
	testing, user1	stat	seet Moourte cette com	050	System Administrator	

The new users show in **Bria: Manage Users**. The users can switch back to the Lightning Experience and use the Bria Sidebar.

all Center Help for this Page I brial Lighthning: Manage Users all Call centers = Brial lighthning = Manage Users w: [All -] Create New View							
'iew: All ▼ (G H I J K L M N O P	Q R S T	U V W X Y Z Other All		
			Add More Users Remove Users				
Action	Full Name +	Alias	Add More Users Remove Users Username	Role	Profile		
Action	Full Name +			Role CEO	Profile System Administrator		
Remove		Alias	Username				

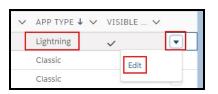
Enabling Open CTI Softphone

The first time the Salesforce admin switches a user to the BriaLightning call center, the Salesforce admin must also enable **Open CTI Softphone** for BriaLightning and assign user profiles that are able to use the BriaLightning app.

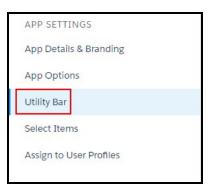
To enable Open CTI Softphone for BriaLightning

1. Log in to Salesforce as a Salesforce admin.

- 2. Switch to the Lightning Experience.
- 3. Click Setup in the Salesforce user interface header.
- 4. Search for App Manger and click App Manager.
- 5. Click **APP TYPE** to sort apps by the Classic or Lightning experience.
- 6. Select **Edit** in the drop down beside a Lightning Experience App you want to add the Bria Sidebar to. Repeat this step for all of the Lightning Experience Apps where the Bria Sidebar should be available.



7. Click Utility Bar in APP SETTINGS.



8. Click Add and click Open CTI Softphone.

open CTI		٢
 Standard 	(1)	

9. Edit the **Properties** for **Open CIT Softphone**. We also recommend using a **Panel**

Width of 210 and a Panel Height of 500.

PROPERTIES	Remove
▼ Utility Item Properties	
* Label	0
Bria	
Icon	0
📞 call 🗙	
Panel Width	0
210	
Panel Height	0
500	
Load in background when app opens	0
	Open CTI Softphone

- 10. Click Save.
- 11. Click Assign to User Profiles in APP SETTINGS.

12. Using Add and Remove, move all profiles you want to give access to BriaLighting to Selected Profiles and move all profiles you do not want to give access to BriaLightning to Available Profiles. Click Back when you are done.

Users that are in both the BriaLightning Call Center and are in one of the **Selected Profiles** can use the Bria Sidebar in the Lightning Experience. Users click **Phone** (or the **Label** you entered) on the Utility Bar to expand and use the softphone.

***	Sales	Home	Opportunities \checkmark	Leads 🗸	Tasks 🗸	Files	Aco
Title		Patel Company	Phone(2) 💌	Email			
		Unknown	C 49374	ted Clo	osed - Not Co	nvert	
A	CTIVITY	СНА	TTER DETAI	LS			
Bria	Bria t Activity	، 🏶 🖪 🚽 ۵			Con	npose	
	2 4:58 PM	10s	0	Ţ		pand All	
Sam P 49374 Today		34s	More Step:		up a meeting	ţ.	11
			•		Ţ	oday 💌	1
			d More Past Acti	vities 🔻			
C Pho	ine						_

Adding more user profiles to Open CTI Softphone

You may want to add more existing user profiles or newly created user profiles to the BriaLightning app. You need to add these user profiles to **Open CTI Softphone**.

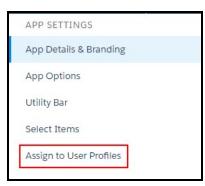
To add user profiles to the BriaLightning app

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Switch to the Lightning Experience.
- 3. Click **Setup** in the Salesforce user interface header.
- 4. Search for App Manger and click App Manager.
- 5. Click **APP TYPE** to sort apps by the Classic or Lightning experience.

6. Select Edit in the drop down beside the Lightning Experience App you want to add user profiles to.

\sim	APP TYPE 🕹 🗸	VISIBLE	~
	Lightning	~	
	Classic	Edit	
	Classic		

7. Click Assign to User Profiles in APP SETTINGS.



 Using Add and Remove, move all profiles you want to give access to BriaLighting to Selected Profiles and move all profiles you do not want to give access to BriaLightning to Available Profiles. Click Back when you are done.

The additional user profiles have been assigned to the BriaLightning app. Users that are in both the **BriaLightning Call Center** and are in one of the **Selected Profiles** can use the Bria Sidebar in the Lightning Experience. Users click **Phone** (or the **Label** you entered) to expand and use the softphone.

* * *	Sales	Home	Opportunities \checkmark	Leads 🗸	Tasks 🗸	Files	Aco
×	Lead Sam						Ĩ
Title	Market	Company Unknown	Phone(2) ▼ €49374	Email	sta elle		1
	~		Working - Contac	cted Clo	osed - Not Cor	nvert	>
_	τινιτγ	СНА	TTER DETAI	LS			
Bria Recent	5	، 🏶 🖪 ج ۹			Con	npose	
Jeannie 49372 Today 4		10s	0	Ŧ	C ⁱ Ex	pand All	
Sam Pat 49374 Today 4		34s	More Step		up a meeting		8
			d More Past Acti	vities	Te	oday 💌	2
C Phon	е						

Switching a user to Salesforce Classic -Classic

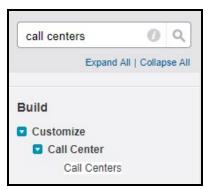
To switch a user back to the Classic experience, the Salesforce admin use has to change a user's call center from BriaLightning to Bria. The Bria Sidebar is only available in the either Salesforce Classic or the Lightning experience. Once Salesforce Classic is enabled, you can switch back to the Lightning Experience, but Bria is not available in the view.

To change from the BriaLightning to the Bria Call Center

- 1. Log on to Salesforce as a Salesforce admin.
- 2. Click **Setup** in the Salesforce user interface header.

ing Experience	Brandi Hart 🔻	Help & Training	License Management App 🔹
My Profile Setup		es +	
Developer Cons Switch to Lightn			Help for this Page 🥹
Logout		Dismiss x	

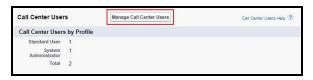
3. Search for call centers in Quick Find / Search and click Call Centers.



4. Click BriaLightning in All Call Centers.

II Ca	Il Centers			Help for this Page
				system already in place at your re they can use any Call Center features
			Import	
Action	Name †	Version	Import Created Date	Last Modified Date
Action Edit Del				Last Modified Date 31/10/2017 5:41 PM

5. Click Manage Call Center Users.



6. Select the users you want to remove from the BriaLightning Call Center and click **Remove Users**.

	-	Add M	fore Users Remove Users		
	Full Name	Alias	Username	Role	Profile
1	Kispender p. Mark	Michael	modernetworkersenetwork.com		System Administrator
	PAS, Report	14.16	SCARUBICAUGAREMENTAL COSTS	010	System Administrator
-	Speep Matt	112104	mercens@cossilearre.com	050	System Administrator
	testing yourt	1000	user hit counterpath, com	950	System Administrator

7. Click on All Call Centers.



8. Click Bria in All Call Centers.



9. Click Manage Call Center Users.

Call Center User	s	Manage Call Center Users	Call Center Users Help ?
Call Center Users	s by Profile	•	
Standard User	1		
System Administrator	1		
Total	2		

10. Click Add More Users.



11. Either click **Find** or enter search criteria and click **Find**.

		or New Users ge Users » Search for New Users	Help for this Page
		click Search to find salesforce.com use is call center agents are excluded from	
None	•	None V	AND
None	•	None V	AND
None	۲	None V	AND
None		None V	AND
None	•	None V	
 For date field 	"or" filters by er is, enter the valu	tering multiple items in the third column, s ie in following format: 23/03/2018 e value in following format: 23/03/2018 7:2	
	Fir	d	

Only users that do not have a call center assigned to them appear in the list.

12. Select the users you want to add and click Add to Call Center.

			Add to Call Center Cancel		
	Full Name	Alias	Username	Role	Profile
•	Kingender 3. Marti	Micas	Interpretation and the com		System Administrator
	PAS, Report	14.16	SCARUE AND REAL OF T	010	System Administrator
•	Speep Matt	112104	mercens@cossileant.com	050	System Administrator
	testing, part	1000	seent-Boownergeth.com	090	System Administrator

The new users show in **Bria: Manage Users**. The users can switch back to Salesforce Classic and use the Bria Sidebar.

All Call Center	nage Users s » Bria » Manage Create New View	Users			Help for this Page 🔞
Iew. All V			GHIJKLMNOP		UVWXXZ Ober A
	AIBIC		Add More Users Remove Users	4 14 5 1	
Action	Full Name †			Role	Profile
Action	Full Name +		Add More Users Remove Users		
Remove	Full Name +	Alias	Add More Users Remove Users Username	Role	Profile

Customizing Bria for Salesforce - Classic

Bria for Salesforce offers various options that can be customized for the end user.

- Call outcome lists
- Email templates
- Call recording preferences
- Follow-up preferences
- DTMF dial scripts

- Bria visibility
- Quick transfer

The sales administrator is responsible for configuring call outcome lists and email templates. End users pick an outcome list and may pick an email template from the ones configured by the sales administrator. For the remainder of end user customizable options, see the Bria for Salesforce User Guide.

Call outcome lists

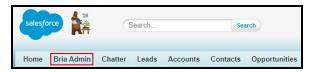
The Bria Sidebar has a field that the sales representative populates during or after a call to capture the result of the call.

This information is logged in reports and if populated correctly, it can make reports more powerful and meaningful to your business.

The sales administrator can predefine outcome lists and options for a group. The sales administrator can assign one list for sales representatives according to their role when enabling Bria. End users can switch between lists but they cannot change the options within the list.

To customize a Call Outcome List

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click **Call Outcome lists**. Existing call outcomes and the details of each list are displayed.

	Bria Hub Support			
Salesforce Setup Bria Users	Call Outcome List M	anageme	ent	
come Lists				
8	Call Outcome List		List Detail	
	Default Inbound Lead Outcomes Opportunity Updates Sates Development Outcomes	*	# Not Working Call Successful Do Not Call Left Voice Mail	~
		•		

Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

- 4. Click the **Call Outcome List** that you want to modify. The options for the list update in **List Detail**.
- 5. To add a new item to the List Detail, type it in the field below List Detail and click
 +.



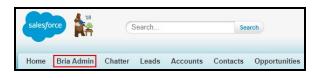
To delete an item from the List Detail, click the item in the list to select it and click -.

		List Detail	
Sales Development Outcomes	*	Call Outcome in Notes	
Default		Contact Evasive	
Inbound Lead Outcomes		Contact Supportive	
Opportunity Updates		Left Voice Mail	
	*		

The Call Outcome List is updated.

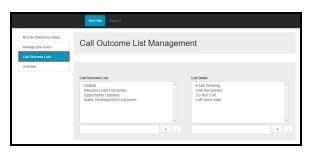
To add a Call Outcome List

- 1. Log in to Salesforce as a Salesforce admin.
- 2. Click Bria Admin.



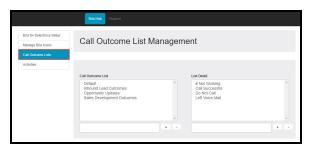
The Bria Hub opens.

3. Click **Call Outcome lists**. Existing call outcomes and the details of each list are displayed.



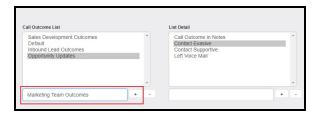
Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

4. Click **Call Outcome lists**. Existing Call Outcome Lists and the List Details are displayed.



Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

5. Type the name for the new list below Call Outcome List and click +.



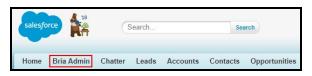
6. Add a new outcomes to the List Detail by typing the outcome it in the field below List Detail and click +.

II Outcome List		List Detail	
Default Inbound Lead Outcomes Marketing Team Outcomes Opportunity Updates Sales Development Outcomes	-		
	-		

The Call Outcome List and each List Detail are added.

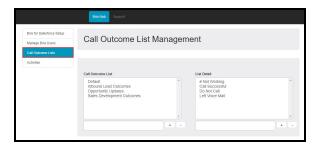
To delete a Call Outcome List

- 1. Log in to Salesforce as an Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click **Bria for Salesforce Setup**. Existing call outcomes and the details of each list are displayed.



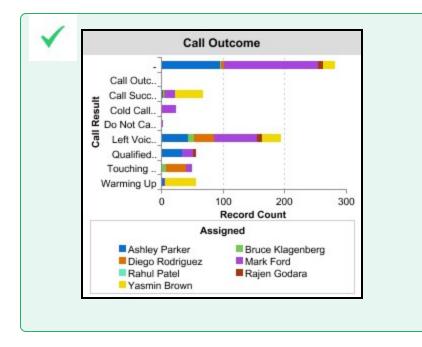
4. Click the Call Outcome List you want to delete and click -.

II Outcome List		List Detail	
Sales Development Outcomes Default Inhound Lead Outcomes Opportunity Updates		Call Outcome in Notes Contact Evasive Contact Supportive Left Voice Mail	
	×		¥
	+ -		+

The Call Outcome List is deleted.

One Call Outcome list per sales role

You might want multiple lists customized for your team if your team has sales representatives working on different roles. For example, John only calls new leads while Janice talks to qualified leads to discuss certain topics. The expected outcomes from the calls are different. Team members determine what call outcomes to capture using Bria. The call outcomes can be viewed using reports and dashboards for analytics.



Email templates

The Bria Sidebar offers one-click follow-up buttons for emailing a contact or a lead. The default email template is customizable by both the Salesforce admin and each Salesforce user.

The Bria Email Templates folder

A new email folder is created after you install the Bria package to your Salesforce setup. The Bria email folder contains a few predefined email templates. You can customize the existing predefined templates or you can add new email templates.

Make sure there is at least one template available for use in the Bria email folder. The templates available for use are shown as options for each sales representative.

To manage Bria Email Templates

- 1. Log into Salesforce as a Salesforce admin.
- 2. Click Setup on the Salesforce user interface header.
- 3. Search for email templates and click Email Templates.

email templates	0	٩
Expand A	ul Collap	ose All
Administer		
Communication Te	mplates	5
Email Templates	1	

4. Click **New Template**, **Edit**, or **Del** and edit the template using the standard Salesforce procedures to create, edit, or delete email templates.

Folder	Bria Er	nail Templates	Edit Creat	te New Folder	
		A B C D E F G	H I J K L	M N O P Q	RSTU
			New Template		
Action		Email Template Name 🛧	Template Type	Available For Use	Description
Edit I	Del 📥	Sales Presentation	Text		
Edit I	Del	<u>Sales: New Customer</u> Email	Text	~	Email to new customers

The Bria Email Templates folder is updated with the changes you made.

Activities and call logs - Classic

A call made with Bria is logged as a task in Salesforce. A call log appears in:

- The Activity section in various Salesforce pages such as Contacts, Leads, Accounts, and Opportunities.
- The Activities list in the Bria Admin tab.
- Reports and dashboards

Activity History for a particular Contact/Lead/Account/Opportunity

The Activity History section provides all the calls made for that particular person.

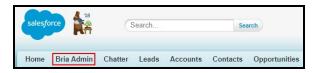
Activity H	listory		Log	a Call Mail I	Merge Send an Email	View All			Activity	History Help (?
Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time	Call Duration	Call Result	Call Type	Time Initiated	Timestamp
Edit Del	Outbound - (604) 555- 9371	1	10/27/2015	Yasmin B	10/28/2015 10:10 AM	16	Left Voice Mail	Outbound	1444793323	10/27/2015 8:14 AM
Edit Del	Outbound - 7785555580	1	10/13/2015	<u>Yasmin B</u>	10/27/2015 8:01 AM	65	None	Outbound	1444763323	10/13/2015 12:08 PM
Edit Del	Inbound - +17785555580	1	10/9/2015	Yasmin B	10/27/2015 8:01 AM	200		Inbound	1442955960	10/9/2015 4:0 PM
Edit Del	Outbound - 7785559371	1	10/2/2015	Yasmin B	10/9/2015 3:50 PM	160		Outbound	1442859969	10/2/2015 10:47 AM
Edit Del	Outbound - +17785559371	1	9/23/2015	Yasmin B	9/23/2015 3:36 PM	16	None	Outbound	1442856966	9/23/2015 3:3 PM
Edit Del	Inbound - +17785559371	1	9/21/2015	Yasmin B	9/21/2015 10:20 AM	20		Inbound	1442855960	9/21/2015 10:19 AM

Activity History for your team

You can view a list of call-related activities for your entire team rather than just for a specified sales representative.

To view team call-related activities

- 1. Log in to Salesforce as an Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click Activities. A list of all Salesforce users appears.

Bria for Salesforce Setup	O Datalla
Manage Bria Users	Company Details
Call Outcome Lists	
Activities	Demain and Admin Llean Dataile
	Domain and Admin User Details

- 4. Use the standard Salesforce procedures to filter, view, edit, and delete activities.
- 5. Click Update.

The Bria Hub shows a list of Activities.

Reports and dashboards - Classic

CounterPath provides various reports and dashboards. It is up to your organization to determine who can access which reports and dashboards.

To view reports and dashboards

1. Click Reports or Dashboards on Salesforce menu.



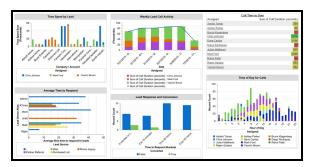
2. Click on the Bria report or dashboard file or folder you want to view.

Reports & Dashboards
Folders
Q Find a folder
All Folders
- 🛅 Unfiled Public Reports
might My Personal Custom Reports
My Personal Dashboards
Bria DashBoards (Installed Package: BriaForSalesforce)
Bria Reports (Installed Package: BriaForSalesforce)
Dashboard (Installed Package: BriaForSalesforce)
Sales KPI Dashboard (Installed Package: BriaForSalesforce)
Account and Contact Reports
Opportunity Reports
Sales Reports
Lead Reports
Support Reports
Campaign Reports
Administrative Reports
Activity Reports
Product and Asset Reports
Call Center Reports
File and Content Reports

The selected folder or file is displayed.

Sample Bria Dashboards

Bria Lead Dashboard



Time Spent by Lead

- Source Report: Bria Activities Related to User
- Indicates which accounts the team is spending the most time on.

Weekly Lead Call Activity

- Source Report: Bria Weekly Activity Report
- Indicates how much time spend on calls this week as a team and by individuals.

Call Time to Date

- Source Report: Bria Activity Summary
- Indicates a total call duration per sales representative

Average Time to Respond

- Source Report: Bria Time to Respond to New Lead
- Indicates how quickly leads are contacted once they come in from a lead source.

Lead Responses and Conversations

- Source Report: Bria Time to Respond Buckets
- Indicates a correlation between response time and conversion of leads.

Time of Day for Calls

- Source Report: Bria Hour of Day Calling
- Indicates when and how many calls are made throughout the day.

Bria Sales Activity Dashboard



Opportunity Activity Analysis

- Source Report: Activities by Assigned Oppty
- Indicates who is working on open opportunities

Activity Logging

- Source report: Bria Activity Summary
- Indicates the total call duration of inbound and outbound calls per sales representative.

Neglected Accounts

- Source report: Important Neglected accounts
- Indicates which accounts the team needs to pay attention to.

Activity Completion

- Source report: Activity Closed Rate
- Indicates who completed how many activities.

Call Made per Rep

- Source report: Activities completed
- Indicates the last time the team worked on open opportunities.

Calls on Leads

- Source report: Bria DB Last Opportunity Contact
- Indicates the last time the team worked on open opportunities.

Custom Reports

In the Salesforce Report Builder, you can customize existing reports or create new ones. Most data captured by Bria can be found under the following sections:

- Activity Information
- Leads
- Contacts
- Opportunities
- Accounts

Check the **Custom Info** folder on the left-side Fields pane in order to locate some Briarelated fields.

i salesforce				'n	aamin B	 Setup 		
Pria Time to Resp	oond to New	Lead				Guided Tour	Video Tutorial Help	for this Page
Save Save As Close	Report Properties	Add Report Type	Run Report					
ields All a # 📼	Filters Add							
Q. Quick Find	Show Allea	ds	¥.					
as and drop to add fields to the report	Date Field Creat	e Date V Range	Custom V From 1/1/2015		0	6		
- 4 Email - 4 Website								
	Preview Mat	rix Format * Show * [Add Chart Remove All Columns		Web	Phone Inquiry	Partner Referral	Purchased
Email Bounced Date Evad: Custom Info Dria leads first contact Dria leads last contact	Preview Mat	rix Format ▼ Show ▼ [•	Web	Phone Inquiry	Partner Referral	Purchased
Email Bounced Date Lead: Custom Info Dira leads first contact Dira leads last contact # Dira leads total inbound calls	Lead Owner Alias	Drop a field here to	Lead Source Drop a field here to	•	Web	Phone Inquiry	Partner Referral	Purchased
Email Bounced Date Lead: Custom Info Dria leads first contact Dria leads last contact			Lead Source Drop a field here to create a column grouping.	0.00 0.00 0.00 0.00	Web 15.67 20.00 10.00 3	Phone Inquiry 18.00 21.00 15.00 2	Partner Referral 18.25 23.00 13.00 4	Purchased 14 16 12
Email Bounced Date Lead: Cestom lefb Dia leads first certact Dia leads first certact Pira leads total cestored call Pira leads total cestored call	Lead Owner Alias	Drop a field here to	Lead Source Drop a field here to create a column grouping. Drop summarizable fields into the matrix. Average Bris time to respond to leads Langet Bris time to respond to leads Simalist Bris are to respond to leads	0.00	15.67 20.00 10.00	18.00 21.00 15.00	18.25 23.00 13.00	14

Captured call data

Bria captures various call-related information and integrates it in Salesforce.com for reports. The following is an overview of the data captures by Bria.

For each call:

- Call type: Whether a call is inbound or outbound
- Caller and Callee
- Phone number

- Call duration (in seconds)
- Time of day the call is made
- Call outcome: Populated by each sales representative using the Bria Side Bar
- Comments: Populated by each sales representative using the Bria Side Bar

For each contact or lead

- First time and last time the person was contacted using Bria
- Total number of inbound and outbound calls
- Total talk time using Bria
- Time to respond to lead: The time between when a lead is created in Salesforce and the lead is contacted for the first time using Bria

Reference

This section provides reference information for Bria for Salesforce.

Lightning

Handling ring groups in Bria for Salesforce Controlling whether Salesforce creates a new lead for every call

Classic

Handling ring groups in Bria for Salesforce

Controlling whether Salesforce creates a new lead for every call

Handling ring groups in Bria for Salesforce -Lightning

Due to the design of Bria for Salesforce, inbound call ring groups create the potential for duplicate call logs of zero seconds on ring group members who ultimately did not answer the call.

The following best practice to eliminate duplicate call logs in ring groups uses three Salesforce related techniques:

Creating a custom field

Setting up an auto launched flow

Setting up a process

It is recommended that you implement this on your developer org first. After it has been tested on your developer org, you can move it into production.

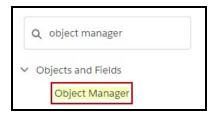
Setting up a Custom Field in Activities

First, create a custom date/time field which is 55 minutes before the incoming call. You can customize the value of 55 minutes. The custom field is used when setting up the process.

Make sure you are logged in as an administrator and are in Setup.

To set up a custom field

1. Search for object Manager in Quick Find and click Object Manager.



2. Click Activity in the Object Manager.

	ject Ma ms, Sorted b			
LABEL		API NAME	DESCRIPTION	
Account		Account		

3. Click Fields & Relationships.



4. Click New. The New Custom Field wizard opens.

Fields & Relationships 8 Items, Sorted by Field Label		Q Quick Find	New	New Field Dependencie		
FIELD LABEL		FIELD NAME	DATA TYPE	CONTROLLING FIE	INDEXED	

- 5. Select Formula as the Data Type and click Next.
- 6. Type Call Time Back Date in Field Label and press TAB. Field Name autopopulates. Select Date/Time in Formula Returns Type and click Next.



7. Type the formula CreatedDate - (55/1440), type Sets a start time for 55 minutes before the Activity Creation Date in Description, and click Next.

Activity	•
Call Time Back Date2 (Date/Time) =	
CreatedDate - (55/140)	
Check Syntax	
Description	
Sets a start time for 55 minutes before the Act	livity Creation Date
	livity Creation Date
Sets a start time for 55 minutes before the Act Help Text	
	Livity Creation Date

Note: The number of minutes can be modified to suit your needs.

- 8. Set the **Field-Level Security for Profile** that is appropriate for your organization and click **Next**.
- 9. Select the page layouts that should include this field and click Save.

You have created the custom field that is used in the process builder.

Setting up an auto-launched flow

Setting up an auto-launched flow consists of the following steps:

Creating a new flow Creating variables in the new flow Creating a Fast Lookup element Creating a Decision element Creating a Fast Delete element Connecting the elements

Make sure you are logged in as an administrator and are in **Setup**.

Creating a new flow

Creating a new flow opens the Flow Designer.

To create a New Flow

1. Search for flows in Quick Find and click Flows.

Q flows	
 Process Automation 	
Flows	

2. Click New Flow.

		Up	load New Flow		
Flow Name ↑	Description	Last Modified By	Last Modifie	ed Date	Run Restriction
No records to display.					

The Flow Designer opens.

Creating variables for the flow

In the flow designer, create an SObject Variable and a SObject Collection Variable. The SObject Variable is used in the Fast Lookup element. The SObject Collection Variable is used in the Fast Lookup element, the Decision element, and the Fast Delete element.

To create flow variables

- 1. On the **Resources** tab, double-click **SObject Variable**.
- 2. Type FirstActivityCall in Unique Name. Set the Input/Output Type to Input and Output and Object Type to Task.

SObject Variable		×
	esents a record for a specified object. Use record lookups or Object variable's fields, which can be referenced and updated	
Unique Name * Description	FirsActivityCall	i
Input/Output Type Object Type *	Input and Output 🗸	1
	OK Cancel	

- 3. Click OK.
- 4. On the Resources tab, double-click SObject Collection Variable.
- 5. Type NewCallSearchResult in Unique Name. Set the Input/Output Type to Input and Output and Object Type to Task.

SObject Collection	on Variable	×
Use sObject collections loop.	to group together sObject values. Iterate through your collection with	a
Unique Name 🐐	NewCallSearchResult	j
Description		
Input/Output Type	Input and Output]
Object Type 😽	Task	
	OK	

6. Click OK.

The SObject Variable and the SObject Collection Variable are created.

Creating the Fast Lookup element

The **Fast Lookup** element is used to determine if there are any incoming calls with a duration of zero seconds. This sections uses the variables you created in Creating variables for the flow.

To create the Fast Lookup element

1. From the Palette tab, drag Fast Lookup onto the canvas. The Fast Lookup dialog

opens.

2. Type Find the unanswered records in Name and type TAB. Unique Name autopopulates. Change Look up to Task. More fields appear in Filters and Assignments.

Fast Lookup		×
Use filters to look sObject collection	up Salesforce records. Assign fields from a single record to an sObject variable or fields from multiple records to an variable.	
▼ General Settings		1
Unique Name 🛊	Find the unanswered records Find, the unanswered records Add Description II	
▼ Filters and Assig	nments	ŧ.
Look up 🔹	Task v that meets the following criteria:	

3. Create the following filters (use Add Row to add subsequent filters):

Field Bria_PhoneNumber_c **Operator**: equals **Value**: {!FirstActivityCall.Bria_ PhoneNumber_c}

Field: CallDurationInSeconds Operator: equals Value: 0

Field: CallType Operator: equals Value: Inbound

Field: CreatedDate Operator: greater than or equal to Value: {!FirstActivityCall.CreatedDate}

ok up 🐐 Task	▼ that meets the foll	owing	criteria:
Field	Operator		Value
Bria_PhoneNumber_c	▼ equals	-	{IFirsActivityCall.Bria_PhoneNu -
CallDurationInSeconds	▼ equals	-	0
CallType	▼ equals	-	Inbound
CreatedDate	▼ greater than or	-	{!FirsActivityCall.CreatedDa 🕶

Tip: Start typing the value you want in Field, Operator, and Value. Choose the correct option from the filtered list that appears.

4. Set Variable to {!NewCallSearchResult} and select Assign null to the variable if no records are found.

Variable 🐐	{!NewCallSearchResult}
	Assign null to the variable if no records are found.

5. Set Fields in Specify which of the record's fields to save in the variable to Id and click OK.

Fields	Specify which of th	record's fields to save in the variable
	Fields	
	Id	

The Fast Lookup element is created.

Creating the Decision element

If the **NewCallSearchResult** variable shows calls in it, these related logs need to be deleted. The decision element determines whether or not there are records in the **NewCallSearchResult**.

To create the Decision element

- 1. From the **Palette** tab, drag **Decison** onto the canvas. The **Decision** dialog opens.
- 2. In General Settings, type Is the search empty into Name and type TAB. Unique name auto-populates.
- 3. Create the following outcomes (use Add Outcomes to add subsequent outcomes):

Name: Yes Unique Name: Yes Resource: {!NewCallSearchResult} Operator: is null Value: {!\$GlobalConstant.True}

Name: No there are records Unique Name: No_there_are_records Resource: {!NewCallSearchResult} Operator: is null Value: {!\$GlobalConstant.False}

Drag to reorder outcome execution EDITABLE OUTCOMES	Create an outcome. You can then select it when you draw a connector out from this decision.
Yes	Name · No there are records
No there are records	Unique Name . No_there_are_records
Add Outcome DEFAULT OUTCOME [Default Outcome]	Resource Operator Value (MexrCallSexxAMexrJ) * (mmil * (SSGIdualConstant False) * Add Conditions * Add conditions must be true (AND) * *

Tip: Start typing the value you want in Field, Operator, and Value. Choose the correct option from the filtered list that appears.

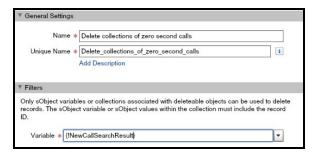
4. Click OK.

Creating the Fast Delete element

The **Decision** element has the **No there are records** outcome, the **Fast Delete** element deletes the related call records.

To create the Fast Delete element

- 1. From the **Palette** tab, drag **Fast Delete** onto the canvas. The **Fast Delete** dialog opens.
- 2. In General Settings, type Delete collection of zero second calls into Name and type TAB. Unique name auto-populates.
- 3. In Filters, set Variable to {!NewCallSearchResult}.



4. Click OK.

The Fast Delete element is created.

Connecting the elements

The canvas should have three elements on it - Fast Lookup, Decision, and Fast Delete. The elements need to be connected and then the flow can be saved.

To connect the elements

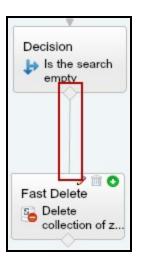
1. Hover on the Fast Lookup element and click Set as Start element.



2. Click and drag the diamond at the bottom of **Fast Lookup** to **Decision**.



3. Click and drag the diamond at the bottom of Decision to Fast Delete.



The **Decision Routing** dialog opens.

- 4. Set the Decision Routing to No there are no records.
- 5. Click OK.
- 6. Click Save. The Flow Properties dialog opens.
- 7. Type Clean Missed Call in Name and type TAB. Unique Name and Interview Label auto-complete. Make sure Type is set to Autolaunched Flow.

Name 🐐	Clean Missed Call	
Unique Name 🜸	Clean_Missed_Call	i
Description		
Туре	Autolaunched Flow	i
	Doesn't require user interaction. Autolaunched flows can be launched automatically by the system, like with a process or Apex.	
Interview Label	Clean Missed Call {!\$Flow.CurrentDateTime}	i

- 8. Click Close. The Clean Messed Call flow opens.
- 9. Click Activate.

Flow Versions	5
Action	Name
Open Run Ac	tivate Clean Missed Call

The Clean Missed Call flow is activated.

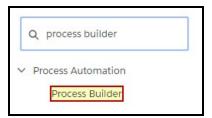
Setting up a Process with Process Builder

Create a **Process Builder** in order to launch the flow. This must be done after you have created **Call Time Back Date** custom field and after you have created and activated the **Clean Missed Call** flow.

Make sure you are logged in as an administrator and are in Setup.

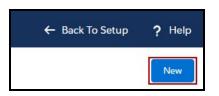
To create a process builder

1. Search for process builder in Quick Find and click Process Builder.



My Processes opens.

2. Click New.



- 3. Type Catch Repeat Call Logs in Process Name and type TAB. API Name autocompletes. Set The process start when to A record changes.
- 4. Click Add Object. Choose Task as the Object, under Start the process select only

when a record is created and click Save.

START	Choose Object and Specify When to Start the Process
+ Add Object	Object* Task
	Start the process*
+ Add Criteria TRI	only when a record is created when a record is created or edited
	Save
	+ Add Action

5. Click Add Criteria. Type New Call to Ring Group in Criteria Name. Under Criteria for Excluding Actions select Conditions are met.

Task	Criteria Name* 1
+ Add Criteria	Criteria for Executing Actions* Conditions are met Formula evaluates to true No criteria–just execute the actions!

6. Use **Field**, **Operator**, **Type**, and **Value** to create a condition or a group of conditions that includes all users in the ring group. Some of the choices you could use are User ID, User Profile, Department, Division, or User Role.

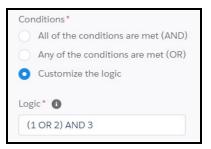
This example uses **Assigned To ID (User)** > **Alias** to get the **Field**: [Task].Owner.User.Alias. **Operator**: Equals **Type**: String **Value**: *<User Alias in Ring Group>* for each user in the ring group.

Task 🕨 Assigned To ID (User) 🕨 Alias	Field*	Operator*	Type*	Value*	
	1 [Task].Owner:Q	Equals	String	BHart	×
	2 [Task].Owner:Q	Equals	 String 	BGreene	×

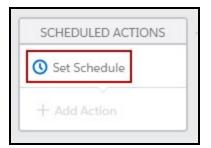
7. Create a condition to for inbound calls. **Field**: [Task].CallType **Operator**: Equals **Type**: Picklist **Value**: Inbound.



8. In Conditions, select the option that includes each user and inbound calls. If you used one condition to include all the users of the ring group, use All of the conditions are met (AND). If you used more than one condition to include all the users, you need an OR for each of the users and AND for the call type. This example uses Customize the logic and the Logic is (1 OR 2) AND 3.



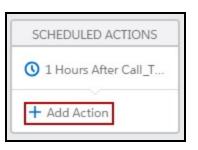
- 9. Click Save.
- 10. Click Set Schedule in Scheduled Actions.



11. Complete Set Time for Actions to Execute as 1 Hours After and select Call Time Back Date in Select a date... and click Save.



12. Click Add Action in the same Scheduled Actions box.



13. Select Flows in Action Type. Action Name and Flow appear. Type Start the cleaning flow in Action Name and select Clean Missed Calls in Flow. Click Add Row in Set Flow Variables.

Action Type*			
Flows	•		
Action Name* 🚯			
Clean missed calls			
Flow* 🚯			
Clean Missed Call	-		
Select an existing flow. If none	exist, create one.		
Set Flow Variables			
Set values for flow variab record. The values must r	les by entering lite	ral values or referencing field values from a related	
+ Add Row	nateri trie variable	s data type.	

14. Select FirstActivityCall in Flow Variable, Field Reference for Type. Click in Value and pick Select the Task record that started your process and click Choose. Click Save.

Flow Variable *		Type *	Value*		
FirsActivityCall	•	Field Reference	[Task]	Q	×

15. Click Activate.



16. Read the Activate Version window and click Confirm if you agree.

Your Process for removing duplicate call logs with a call time of 0 seconds is complete and active.

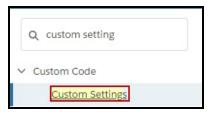
Controlling whether Salesforce creates a new lead for every call - Lightning

You can control whether a new lead is created for every call.

Make sure you are logged in as an administrator and are in Setup.

To control new leads

1. Search for custom settings in Quick Find and click Custom Settings.



2. Click Manage next to Service Settings.

				New	
Action	Label +	Visibility	Settings Type	Namespace Prefix	De
Manage 🚽	Application Settings	Public	List	Bria	
Manage 🚽	Service Settings	Public	Hierarchy	Bria	
Manage 🚽	Settings	Public	Hierarchy	Bria	

3. To set Bria for Salesforce so a new lead is created for every call, clear **Disable Unknown Call Logging**.

To set Bria for Salesforce so a new lead is not created for every call, select **Disable Unknown Call Logging**.

Default Organizati	ion Level Value		
Location	100000	Company Name	
Default User Profile	salesforce	Disable Unknown Call Logging	
Domain		Disable Trigger on Tasks	0
Parent Group Name	SalesForce	Source Group Name	salesforce_template

Bria for Salesforce is set to control new leads.

Handling ring groups in Bria for Salesforce -Classic

Due to the design of Bria for Salesforce, inbound call ring groups create the potential for duplicate call logs of zero seconds on ring group members who ultimately did not answer the call.

The following best practice to eliminate duplicate call logs in ring groups uses three Salesforce related techniques:

Creating a custom field

Setting up an auto launched flow

Setting up a process

It is recommended that you implement this on your developer org first. After it has been tested on your developer org, you can move it into production.

Setting up a Custom Field in Activities

First, create a custom date/time field which is 55 minutes before the incoming call. You can customize the value of 55 minutes. The custom field is used when setting up the process.

Make sure you are logged in as an administrator and are in Setup.

To set up a custom field

1. Search for activity custom fields in Quick Find / Search and click Activity Custom Fields.

activity custo	m field	ds	0	٩
E	xpand A	ui j c	Collap	se All
Build				
Customize				
Activities	;			
Activit	y Custo	om F	ields	1

2. Click New. The New Custom Field wizard opens.

Activity Custom Fields		New Field Depend	encies	
Action	Field Label	API Name	Installed Package	Data Type

- 3. Select Formula as the Data Type and click Next.
- 4. Type Call Time Back Date in Field Label and press TAB. Field Name autopopulates. Select Date/Time in Formula Returns Type and click Next.

tep 2. Choose output type	e Step 2 of 5
	Previous Next Cancel
Field Label Call Tin	Field Name Call_Time_Back_Date
Formula Return Type	
None Selected	Select one of the data types below.
Checkbox	Calculate a boolean value Example: [TODAY() > CloseDate
Currency	Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: (Gross Margin = Amount - Cost)
O Date	Calculate a date, for example, by adding or subtracting days to other dates. Example: Reminder Date = CloseDate - 7
Date/Time	Calculate a date/lime, for example, by adding a number of hours or days to another date/lime. Example: [Next = NOW() + 1]

5. Type the formula CreatedDate - (55/1440), type Sets a start time for 55 minutes before the Activity Creation Date in Description, and click Next.

Type Insert Operator Activity Insert Merge Field	
Call Time Back Date2 (Date/Time) =	
CreatedDate - (55/140)	
Check Syntax	
Description	
Sets a start time for 55 minutes before the Activity Creation Date	
Sets a start time for 55 minutes before the Activity Greation Date	
Help Text	
//	
Help Text	
Help Text	

Note: The number of minutes can be modified to suit your needs.

- 6. Set the **Field-Level Security for Profile** that is appropriate for your organization and click **Next**.
- 7. Select the page layouts that should include this field and click Save.

You have created the custom field that is used in the process builder.

Setting up an auto-launched flow

Setting up an auto-launched flow consists of the following steps:

Creating a new flow Creating variables in the new flow Creating a Fast Lookup element Creating a Decision element Creating a Fast Delete element Connecting the elements

Make sure you are logged in as an administrator and are in **Setup**.

Creating a new flow

Creating a new flow opens the Flow Designer.

To create a New Flow

1. Search for flows in Quick Find / Search and click Flows.

flows Q	Q flows
Expand All Collapse All	✓ Process Automation
Administer	Flows
Security Controls	
Login Flows	
Build	
Create	
Workflow & Approvals	

2. Click New Flow.



The Flow Designer opens.

Creating variables for the flow

In the flow designer, create an SObject Variable and a SObject Collection Variable. The SObject Variable is used in the Fast Lookup element. The SObject Collection Variable is used in the Fast Lookup element, the Decision element, and the Fast Delete element.

To create flow variables

- 1. On the **Resources** tab, double-click **SObject Variable**.
- 2. Type FirstActivityCall in Unique Name. Set the Input/Output Type to Input and Output and Object Type to Task.

SObject Variable		×
	esents a record for a specified object. Use record lookups or Object variable's fields, which can be referenced and updated	
Unique Name * Description	FirsActivityCall	i
Input/Output Type Object Type *	Input and Output v Task	•
	OK Cancel	

- 3. Click OK.
- 4. On the Resources tab, double-click SObject Collection Variable.
- 5. Type NewCallSearchResult in Unique Name. Set the Input/Output Type to Input and Output and Object Type to Task.

SObject Collection	on Variable	,
Use sObject collections loop.	to group together sObject values. Iterate through your collection with	a
Unique Name 🐐	NewCallSearchResult)
Description]
Input/Output Type	Input and Output	
Object Type 🐐	Task	
	OK	

6. Click OK.

The SObject Variable and the SObject Collection Variable are created.

Creating the Fast Lookup element

The **Fast Lookup** element is used to determine if there are any incoming calls with a duration of zero seconds. This sections uses the variables you created in Creating variables for the flow.

To create the Fast Lookup element

1. From the Palette tab, drag Fast Lookup onto the canvas. The Fast Lookup dialog

opens.

2. Type Find the unanswered records in Name and type TAB. Unique Name autopopulates. Change Look up to Task. More fields appear in Filters and Assignments.

Fast Lookup		×
	up Salesforce records. Assign fields from a single record to an sObject variable or fields from multiple records to an	
▼ General Settings	;	P
Unique Name 🐐	Find the unanswered records Find, the unanswered records Add Description	
▼ Filters and Assig	nments	L
Look up 🔹	Task v that meets the following criteria:	

3. Create the following filters (use Add Row to add subsequent filters):

Field Bria_PhoneNumber_c **Operator**: equals **Value**: {!FirstActivityCall.Bria_ PhoneNumber_c}

Field: CallDurationInSeconds Operator: equals Value: 0

Field: CallType Operator: equals Value: Inbound

Field: CreatedDate **Operator**: greater than or equal to **Value**: {!FirstActivityCall.CreatedDate}

ok up 🛊 Task	 that meets the formation 	llowing	criteria:
Field	Operator		Value
Bria_PhoneNumber_c	▼ equals	-	{!FirsActivityCall.Bria_PhoneNu -
CallDurationInSeconds	▼ equals	-	0
CallType	- equals	-	Inbound
CreatedDate	▼ greater than or	. 🔻	{!FirsActivityCall.CreatedDa 🔻

Tip: Start typing the value you want in Field, Operator, and Value. Choose the correct option from the filtered list that appears.

4. Set Variable to {!NewCallSearchResult} and select Assign null to the variable if no records are found.

Variable 🐐	{!NewCallSearchResult}
	Assign null to the variable if no records are found.

5. Set Fields in Specify which of the record's fields to save in the variable to Id and click OK.

Fields	Specify which of th	record's fields to save in the variable
	Fields	
	Id	

The Fast Lookup element is created.

Creating the Decision element

If the **NewCallSearchResult** variable shows calls in it, these related logs need to be deleted. The decision element determines whether or not there are records in the **NewCallSearchResult**.

To create the Decision element

- 1. From the **Palette** tab, drag **Decison** onto the canvas. The **Decision** dialog opens.
- 2. In General Settings, type Is the search empty into Name and type TAB. Unique name auto-populates.
- 3. Create the following outcomes (use Add Outcomes to add subsequent outcomes):

Name: Yes Unique Name: Yes Resource: {!NewCallSearchResult} Operator: is null Value: {!\$GlobalConstant.True}

Name: No there are records Unique Name: No_there_are_records Resource: {!NewCallSearchResult} Operator: is null Value: {!\$GlobalConstant.False}

Drag to reorder outcome execution EDITABLE OUTCOMES	Create an outcome. You can then select it when you draw a connector out from this decision.
Yes	Name · No there are records
No there are records	Unique Name . No_there_are_records
Add Outcome DEFAULT OUTCOME [Default Outcome]	Resource Operator Value (MexrCallSexxAMexrJ) * (mmil * (SSGIdualConstant False) * Add Conditions * Add conditions must be true (AND) * *

Tip: Start typing the value you want in Field, Operator, and Value. Choose the correct option from the filtered list that appears.

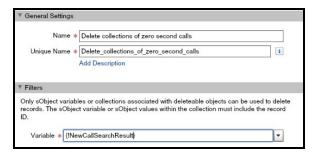
4. Click OK.

Creating the Fast Delete element

The **Decision** element has the **No there are records** outcome, the **Fast Delete** element deletes the related call records.

To create the Fast Delete element

- 1. From the **Palette** tab, drag **Fast Delete** onto the canvas. The **Fast Delete** dialog opens.
- 2. In General Settings, type Delete collection of zero second calls into Name and type TAB. Unique name auto-populates.
- 3. In Filters, set Variable to {!NewCallSearchResult}.



4. Click OK.

The Fast Delete element is created.

Connecting the elements

The canvas should have three elements on it - Fast Lookup, Decision, and Fast Delete. The elements need to be connected and then the flow can be saved.

To connect the elements

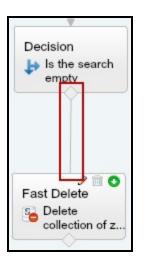
1. Hover on the Fast Lookup element and click Set as Start element.



2. Click and drag the diamond at the bottom of Fast Lookup to Decision.



3. Click and drag the diamond at the bottom of Decision to Fast Delete.



The **Decision Routing** dialog opens.

- 4. Set the Decision Routing to No there are no records.
- 5. Click OK.
- 6. Click Save. The Flow Properties dialog opens.
- 7. Type Clean Missed Call in Name and type TAB. Unique Name and Interview Label auto-complete. Make sure Type is set to Autolaunched Flow.

Name *	Clean Missed Call	
Traine 4		
Unique Name 🐐	Clean_Missed_Call	i
Description		
Туре	Autolaunched Flow	i
	Doesn't require user interaction. Autolaunched flows can be launched automatically by the system, like with a process or Apex.	
Interview Label	Clean Missed Call {!\$Flow.CurrentDateTime}	i

- 8. Click Close. The Clean Messed Call flow opens.
- 9. Click Activate.

Flow Versions	
Action	Name
Open Run Act	ivate Clean Missed Call

The Clean Missed Call flow is activated.

Setting up a Process with Process Builder

Create a **Process Builder** in order to launch the flow. This must be done after you have created **Call Time Back Date** custom field and after you have created and activated the **Clean Missed Call** flow.

Make sure you are logged in as an administrator and are in Setup.

To create a process builder

1. Search for process builder in Quick Find / Search and click Process Builder.



My Processes opens.

2. Click New.



3. Type Catch Repeat Call Logs in Process Name and type TAB. API Name auto-

completes. Set The process start when to A record changes.

4. Click Add Object. Choose Task as the Object, under Start the process select only when a record is created and click Save.

START	Choose Object and Specify When to Start the Process
+ Add Object	Object* Task
	Start the process*
+ Add Criteria TRI	when a record is created or edited Save Cancel
	+ Add Action

5. Click Add Criteria. Type New Call to Ring Group in Criteria Name. Under Criteria for Excluding Actions select Conditions are met.



6. Use **Field**, **Operator**, **Type**, and **Value** to create a condition or a group of conditions that includes all users in the ring group. Some of the choices you could use are User ID, User Profile, Department, Division, or User Role.

This example uses **Assigned To ID (User)** > **Alias** to get the **Field**: [Task].Owner.User.Alias. **Operator**: Equals **Type**: String **Value**: *<User Alias in Ring Group>* for each user in the ring group.

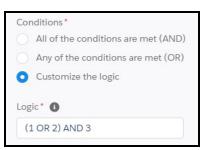
Task 🕨 Assigned To ID (User) 🕨 Alias	Field	*	Operator*		Type*		Value*	
	1 [Ta	sk].Owner:Q	Equals	•	String	•	BHart	×
	2 [Ta	sk].Owner:Q	Equals	•	String	-	BGreene	×

7. Create a condition to for inbound calls. Field: [Task].CallType Operator: Equals

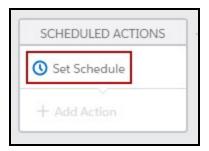
Type: Picklist Value: Inbound.

3 [Task].CallType Q Equals • Picklist • Inbound • ×

8. In Conditions, select the option that includes each user and inbound calls. If you used one condition to include all the users of the ring group, use All of the conditions are met (AND). If you used more than one condition to include all the users, you need an OR for each of the users and AND for the call type. This example uses Customize the logic and the Logic is (1 OR 2) AND 3.



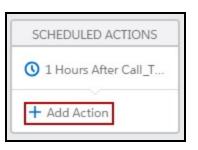
- 9. Click Save.
- 10. Click Set Schedule in Scheduled Actions.



11. Complete Set Time for Actions to Execute as 1 Hours After and select Call Time Back Date in Select a date... and click Save.



12. Click Add Action in the same Scheduled Actions box.



13. Select Flows in Action Type. Action Name and Flow appear. Type Start the cleaning flow in Action Name and select Clean Missed Calls in Flow. Click Add Row in Set Flow Variables.

Action Type *			
Flows	•		
Action Name* 🚯			
Clean missed calls			
Flow*			
Clean Missed Call	-		
Select an existing flow. If none	exist, create one.		
Set Flow Variables			
Set values for flow variab record. The values must i	les by entering liter	al values or referencing field values from a relate	d
+ Add Row	nateri trie variable.	data type.	

14. Select FirstActivityCall in Flow Variable, Field Reference for Type. Click in Value and pick Select the Task record that started your process and click Choose. Click Save.

Flow Variable *		Type *	Value*		
FirsActivityCall	•	Field Reference	[Task]	Q	×

15. Click Activate.



16. Read the Activate Version window and click Confirm if you agree.

Your Process for removing duplicate call logs with a call time of 0 seconds is complete and active.

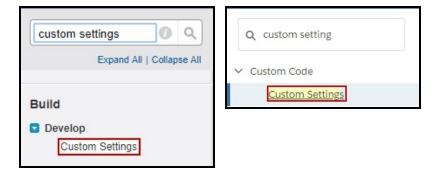
Controlling whether Salesforce creates a new lead for every call - Classic

You can control whether a new lead is created for every call.

Make sure you are logged in as an administrator and are in Setup.

To control new leads

1. Search for custom settings in Quick Find / Search and click Custom Settings.



2. Click Manage next to Service Settings.



3. To set Bria for Salesforce so a new lead is created for every call, clear **Disable Unknown Call Logging**.

To set Bria for Salesforce so a new lead is not created for every call, select **Disable Unknown Call Logging**.

 Default Organizat 	ion Level Value		
Location		Company Name	
Default User Profile	salesforce	Disable Unknown Call Logging	
Domain		Disable Trigger on Tasks	
Parent Group Name	SalesForce	Source Group Name	salesforce_template

Bria for Salesforce is set to control new leads.

Troubleshooting

This section describes some of errors an end user might encounter and login issues end users may have with the Bria Stretto client.

End user errors with the Bria Side Bar

Bria is not running



Either Bria is not installed, or Bria is installed but not running.

Solution for end users

Look for Bria Stretto on your computer, start the application and log in. Use the login credentials the you received by email.

Complete the login to Bria Stretto



Bria is installed and running, but the user has not logged into Bria Stretto. This means that no SIP account is registered and Bria cannot be used to make calls.

Solution for end users

Look for Bria Stretto on your computer, start the application and log in. Use the login credentials the you received by email.

Bria Stretto client issues

Prompt for no license key

End users may get a prompt asking for a license key. This is because the end user's computer does not have the appropriate root certificate for Bria Stretto, the CounterPath's login server. This is not actually a problem with your license; it is an issue with the way Windows obtains root certificates.

Solution

Instruct end users to use Internet Explorer and navigate to https://ccs3.cloudprovisioning.com/status. This will prompt Windows to download the correct root certificate onto their computer and should resolve the issue.

Note: Make sure that end users use Internet Explorer. Other browsers will not work.

Devices limit reached

End users are unable to log into Bria Stretto when they reach the device limit of 5. This happens when a user tries to log into Bria Stretto from the 6th device.

Solution

Contact CounterPath to solve the issue. You, as an administrator, have an option to increase the device limit, or delete unused devices from the user's records on Stretto.

In the meantime, the end user can log into Bria for Salesforce from the other devices they have used for Bria for Salesforce.

Contacting support

You can contact support through a support page in Salesforce. The support page contains links to documents for both end users and administrators, a knowledge base, and FAQ.

	Bria Hub Support	
Bria for Salesforce Setup Manage Bria Users	Resources	
Call Outcome Lists	Documents	Knowledge Base
Activities	Learn about how to use and administer Bria for Salesforce.	Search our Knowledge base for answers to issue
	View details »	View detail:
	improve you productivity. View details »	
	Share Feedback	Contact Form
	Share Feedback Topic could be commented by others	
		Contact Form 100 Question

To contact support - Classic

- 1. Log in to Salesforce as an Salesforce admin.
- 2. Click Bria Admin.

Home +	
Search All Search All Got Limit to items I own Advanced Search	All Tabs Use the links below to quickly navigate to a tab. Alternatively, View: AllTabs V
Create New	Accounts
Recent Items No records to display	Assets Bria Admin
😨 Recycle Bin	b Campaigns Tell me more!

The Bria Hub opens.

- 3. Review the Documents, Knowledge Base, and FAQ for the question you are looking for.
- 4. If you cannot find what you are looking for, create your own question.

To contact support - Lightning

- 1. Log in to Salesforce as an Salesforce admin.
- 2. Click Bria Admin.



The Bria Hub opens.

3. Click on Support.



- 4. Review the Documents, Knowledge Base, and FAQ for the question you are looking for.
- 5. If you cannot find what you are looking for, create your own question.

Release notes

This section provides a summary of the changes for each release of Bria for Salesforce.

Version 2.0 (July 2018)

• Lightning ready

Version 1.128 (June 2016)

Initial release