CounterPath

Bria for Salesforce

Admin Guide - Version 2.0

www.counterpath.com

About this document

This guide corresponds to Bria for Salesforce for Admin Guide - Version 2.0.
Publication date: 2018-09-06

CounterPath Corporation
Suite 300, One Bentall Centre
505 Burrard Street, Box 95
Vancouver, BC V7X 1M3
Canada

+1.604.320.3344
sales@counterpath.com
www.CounterPath.com

Contents

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 – 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:

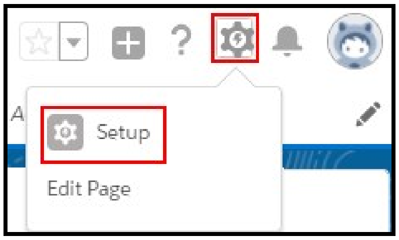
- SIP domain
- Proxy
- Voicemail number
- Your SIP username, password, and authorization name (if used by the SIP server)

Installing the BriaLightning package

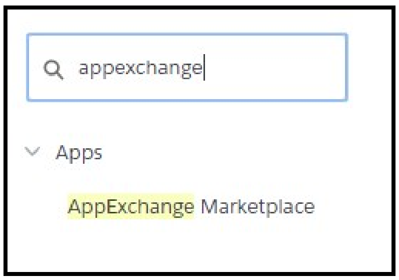
The Bria for Salesforce package is found on the Salesforce AppExchange.

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**.



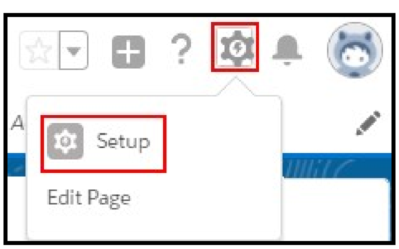
4. Search for **Bria**.
5. Click **Get It Now**.
6. Follow the prompts to install Bria. Choose the **Install for All Users** option.

Assigning Bria for Salesforce licenses

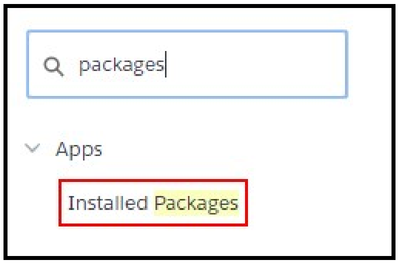
Before Salesforce you can use the Bria for Salesforce add-in, they need to have a Bria for Salesforce license assigned.

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.

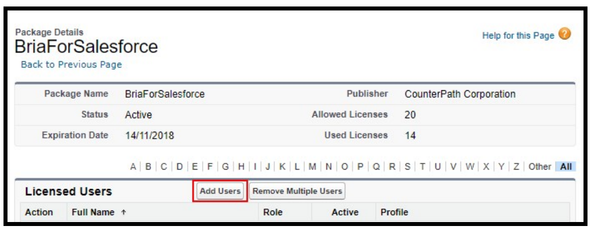


3. Search for **packages** and click **Installed Packages**.



4. Click **Manage Licenses** for the **BriaForSalesforce** package.

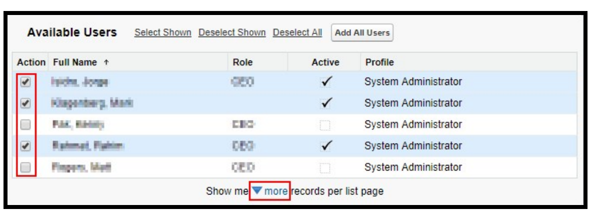
5. Click **Add Users**.



A list of **Available Users** appears.

6. Select your user.

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



Your user shows in the **Selected Users** list.

7. Click **Add**.

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.

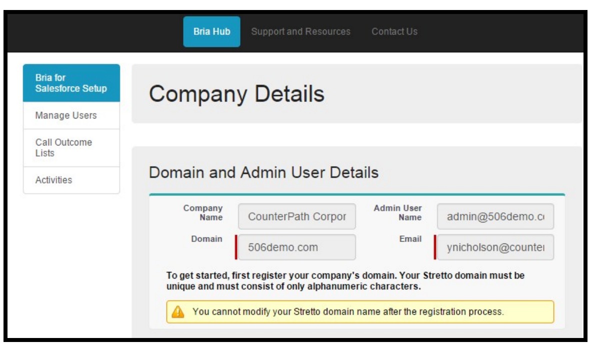
To configure your PBX/SIP server

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

   The Bria Hub opens.

3. Complete the **Company Details**.

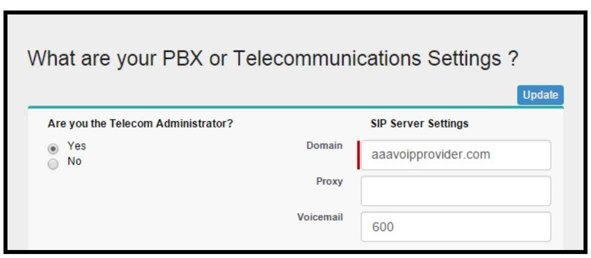
   

- **Company Name**: Populated from Salesforce.
- **Domain**: The domain for Bria Stretto login. Typically, your organization's domain used for email, such as counterpath.com from yasmin.brown@counterpath.com. Keep it short – all end users need to enter this domain name when logging into the Bria Stretto 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.



5. Click **Update.**

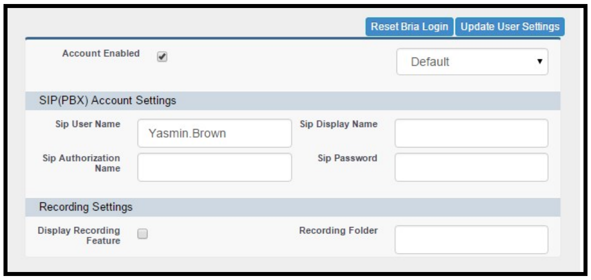
The **Adding First Bria user** screen appears.

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.



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**.

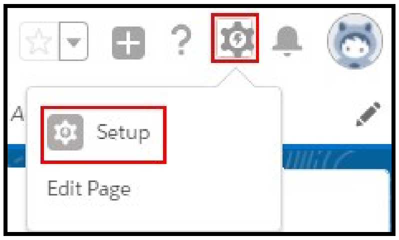
An email is sent with your Bria credentials from Bria/CounterPath to the email account associated with Salesforce.

Assigning the Bria for Salesforce permission set

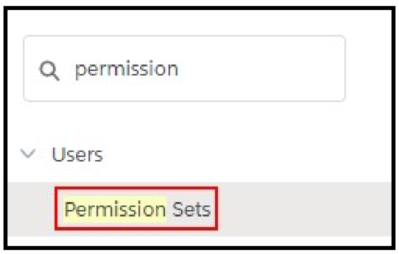
After setting up the PBX/SIP server, you need to be assigned the appropriate Bria permission set.

To assign the Bria permission set

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

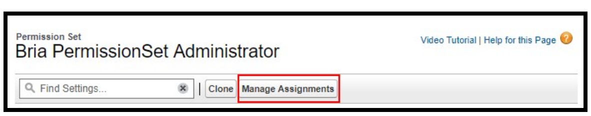


3. Search for **permission** and click **Permission Sets**.

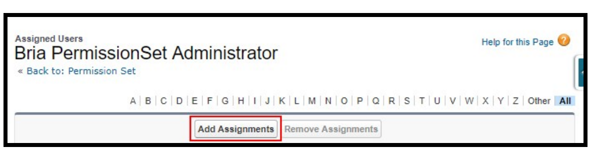


4. Click **Bria for Salesforce PermissionSet Administor**.

5. Click **Manage Assignments**.

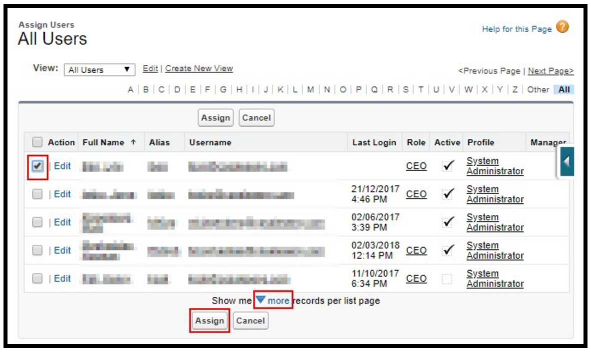


6. Click **Add Assignments**.



7. Select your user and click **Assign**.

   If you do not see your user, click **more**.



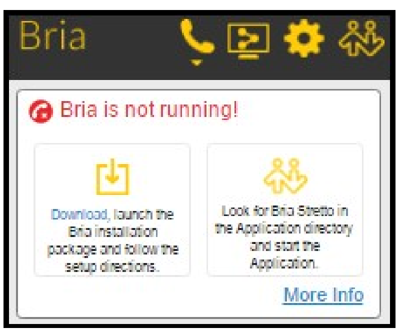
The Bria permission set is assigned to you.

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

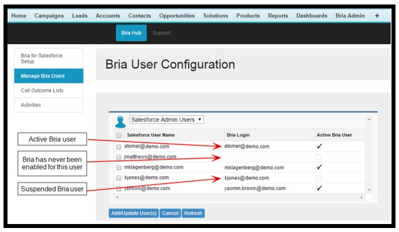
You can review the list of Salesforce users and see whether they are active Bria users. You can enable or suspend Bria for Salesforce for a user, as well as reset their Bria Stretto password from the users list.

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:

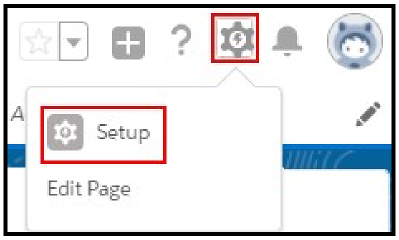
- The SIP username, password, and authorization name (if used by the SIP server)

Assigning Bria for Salesforce licenses

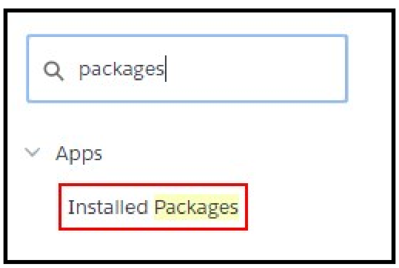
Before Salesforce users can use the Bria for Salesforce add-in, they need to have a Bria for Salesforce license assigned.

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**.



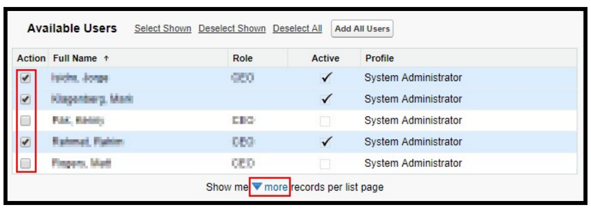
4. Click **Manage Licenses** for the **BriaForSalesforce** package.

5. Click **Add Users**.

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**.



   The selected users show in the **Selected Users** list.

7. Click **Add**.

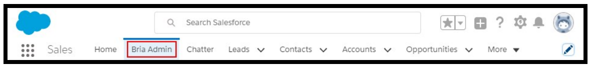
The Salesforce users have a Bria for Salesforce license assigned to them.

Adding Bria users

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

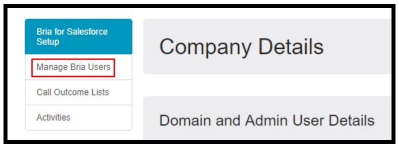
To add Bria for a user

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



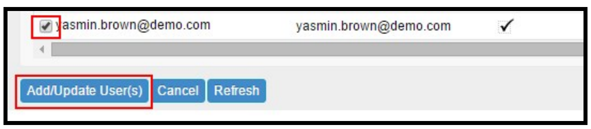
The **Bria Hub** opens.

3. Click **Manage Bria Users**.



A list of all Salesforce users appears.

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

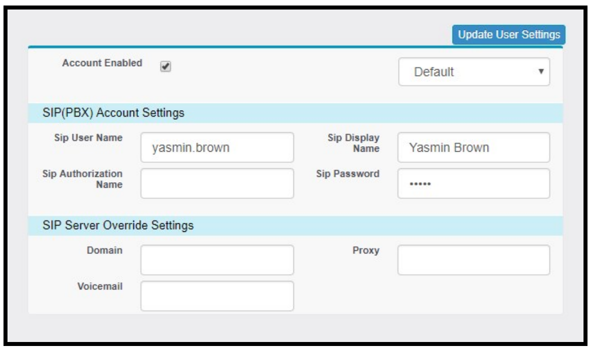


The **Settings for *username*** section appears below the list of users.

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.



6. Click **Update User Settings**.

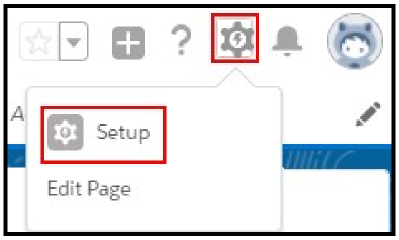
The user receives an email from CounterPath with their Bria login information. To see the latest information in the **Bria Users** list, you may need to refresh your browser or click **Refresh** under the **Bria Users** list.

Assigning the Bria for Salesforce permission set

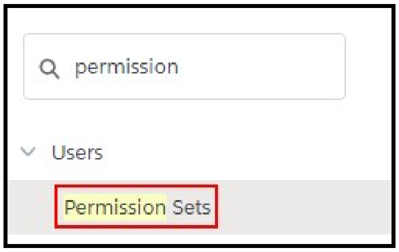
After setting up the PBX/SIP server, users need to be assigned the appropriate Bria permission set.

To assign the Bria permission set

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

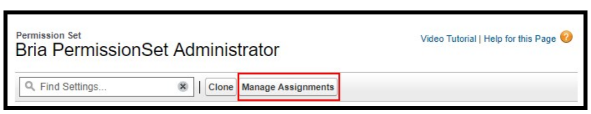


3. Search for **permission** and click **Permission Sets**.

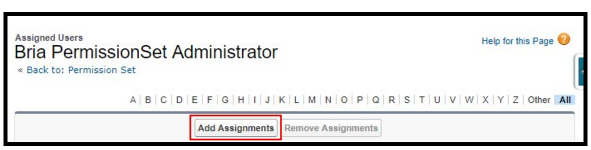


4. Click either the **Bria for Salesforce PermissionSet Administor** or the **Bria PermissionSet Standard User** depending on the permissions you want to assign to users.

5. Click **Manage Assignments**.

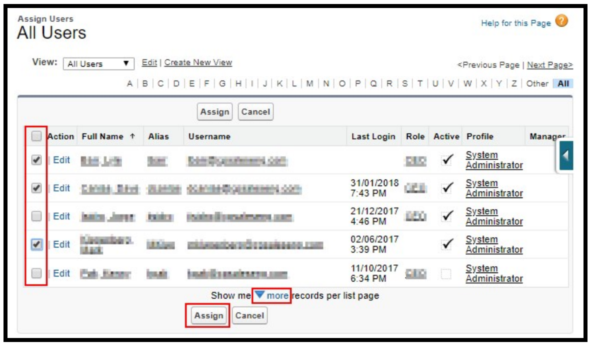


6. Click **Add Assignments**.



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**.



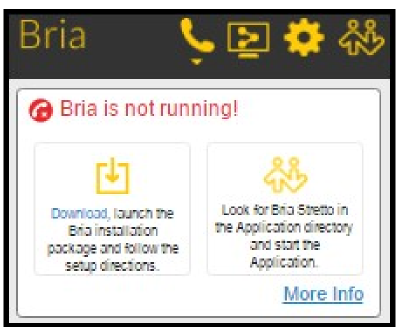
The Bria permission set is assigned to the users.

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**.

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.

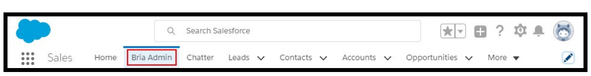
When a sales representative leaves the job, the Salesforce admin typically deletes the person's Salesforce account. If the user is deleted from Salesforce, you do not need to do anything in the **Bria Hub**. The Bria subscription ends for the user when the user is deleted from Salesforce.

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.

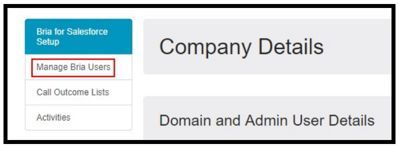
To suspend a user from Bria

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

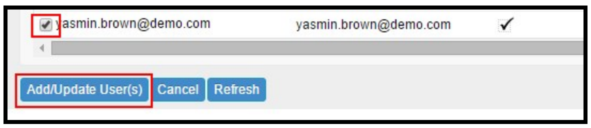
   The **Bria Hub** opens.

3. Click **Manage Bria Users**.



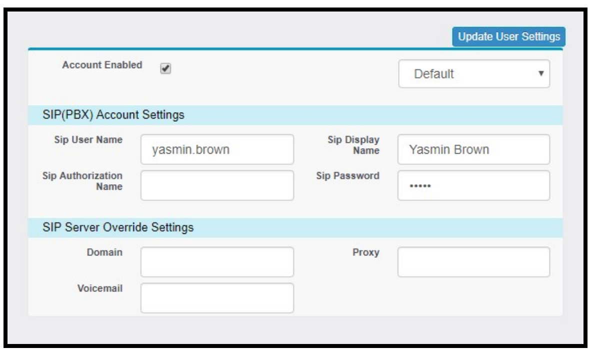
A list of all Salesforce users appears.

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



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

5. Clear **Account Enabled**.



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

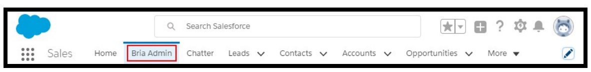
Changing the Salesforce password does not affect Bria. No extra action is required for the user or the sales administrator in order to continue using Bria for Salesforce.

Bria Password

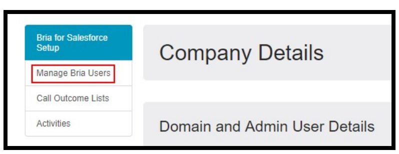
The password for logging into Bria Stretto clients is generated by the CounterPathStretto server and emailed to the individual end user. If the end user forgets the Bria password, the sales administrator can reset the password.

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.

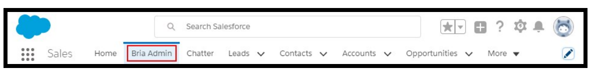
The Bria login password is reset and the end user receives an email with the new password.

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.

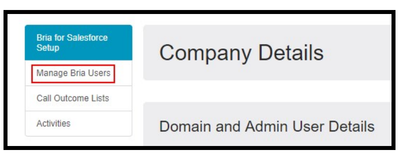
To update the SIP/PBX password

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



   The **Bria Hub** opens.

3. Click **Manage Bria Users**.



   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

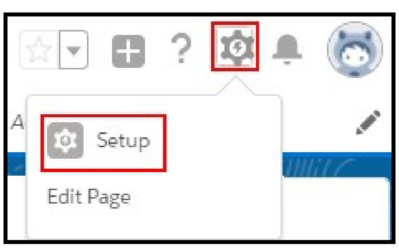
To switch a user back to the Lightning experience, the Salesforce admin use has to change a user's call center from Bria to BriaLightning. The Bria Sidebar is only available in the either Salesforce Classic or the Lightning experience. Once the Lightning Experience is enabled, you can switch back to 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.

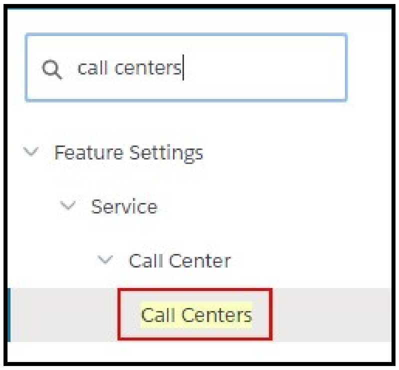
Finally, **Open CTI Softphone** needs to be added to the **Utility Bar**.

To change from the Bria to the BriaLightning Call Center

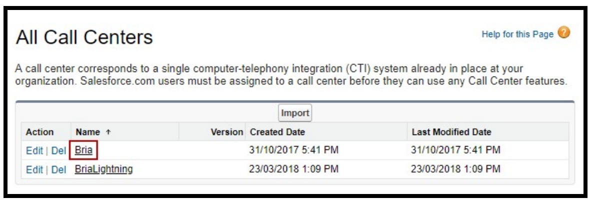
1. Log on to Salesforce as a Salesforce admin.
2. Click **Setup** in the Salesforce user interface header.



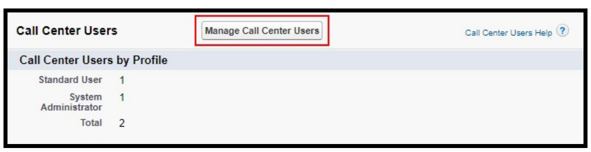
3. Search for **call centers** in **Quick Find** and click **Call Centers**.



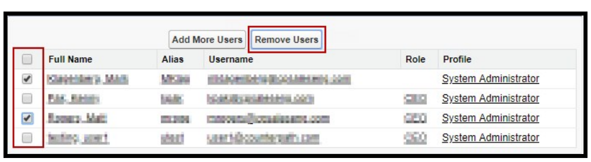
4. Click **Bria** in **All Call Centers**.



5. Click **Manage Call Center Users**.

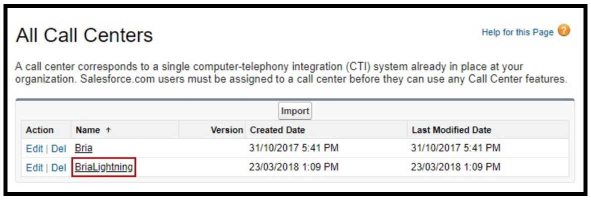


6. Select the users you want to remove from the Bria Call Center and click **Remove Users**.

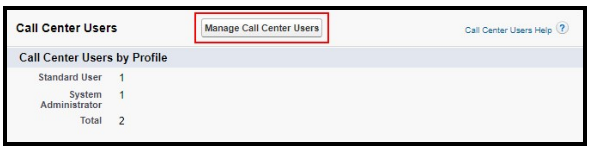


7. Click on **All Call Centers**.

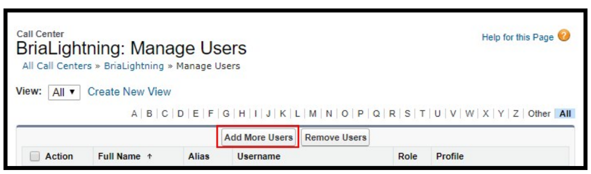
8. Click **BriaLightning** in **All Call Centers**.



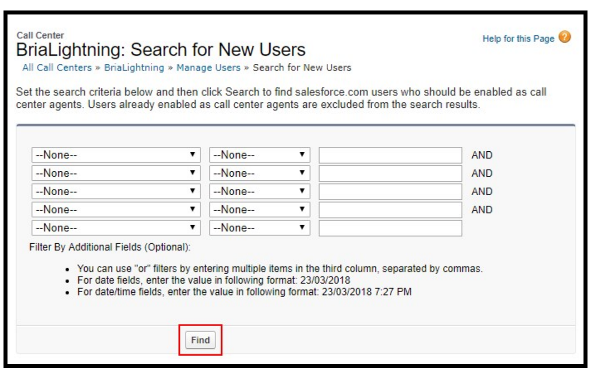
9. Click **Manage Call Center Users**.



10. Click **Add More Users**.

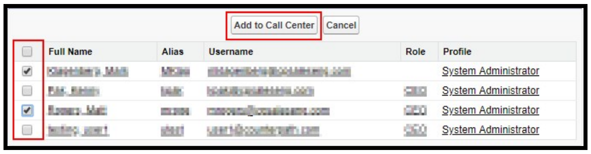


11. Either click **Find** or enter search criteria and click **Find**.



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**.



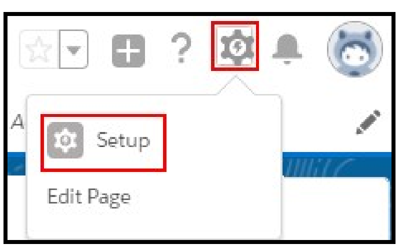
The new users show in **Bria: Manage Users**. The users can switch back to the Lightning Experience and use the Bria Sidebar.

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.

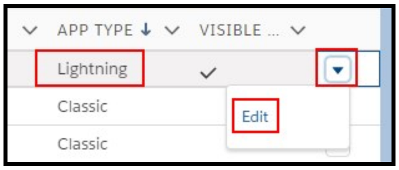
To enable Open CTI Softphone for BriaLightning

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

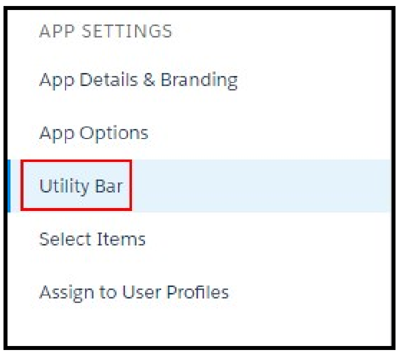


3. Search for **App Manger** and click **App Manager**.

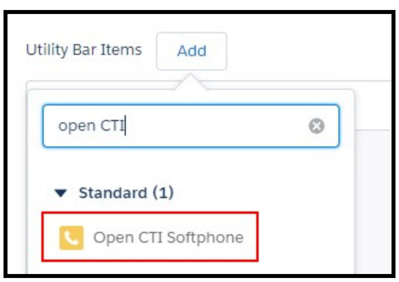
4. Click **APP TYPE** to sort apps by the Classic or Lightning experience.
5. Select **Edit** in the drop down beside a Lightning Experience App you want to add the Bria Sidebar to. Repeat this step for all of the Lightning Experience Apps where the Bria Sidebar should be available.



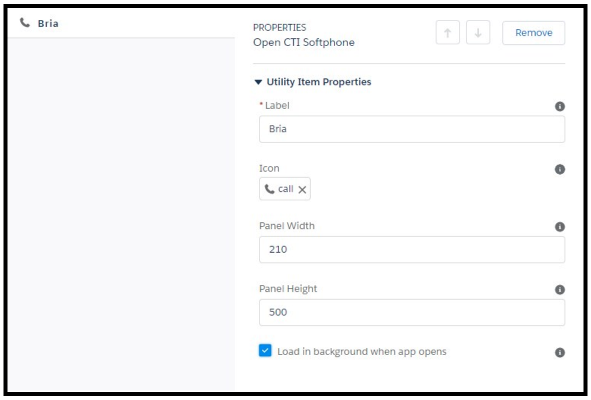
6. Click **Utility Bar** in **APP SETTINGS**.



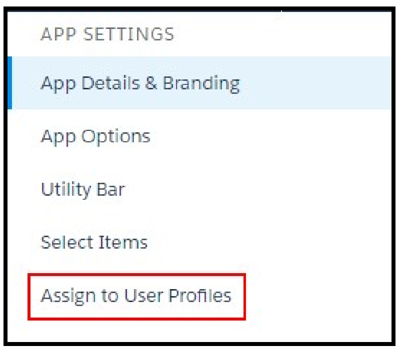
7. Click **Add** and click **Open CTI Softphone**.



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

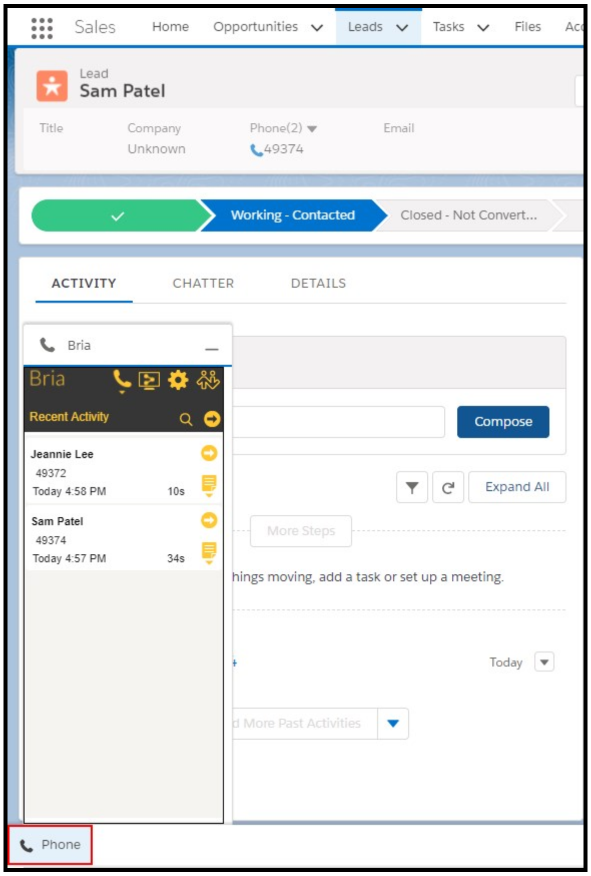


9. Click **Save**.
10. Click **Assign to User Profiles** in **APP SETTINGS**.



11. 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.

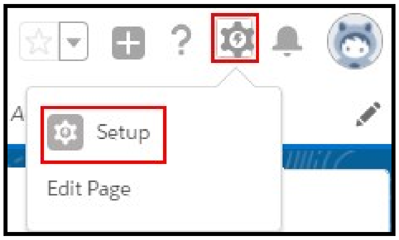


Adding more user profiles to Open CTI Softphone

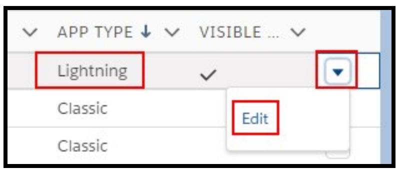
You may want to add more existing user profiles or newly created user profiles to the BriaLightning app. You need to add these user profiles to **Open CTI Softphone**.

To add user profiles to the BriaLightning app

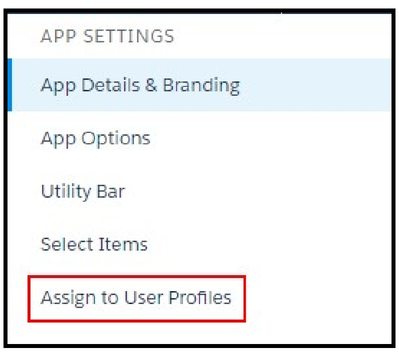
1. Log in to Salesforce as a Salesforce admin.
2. Click **Setup** in the Salesforce user interface header.



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.

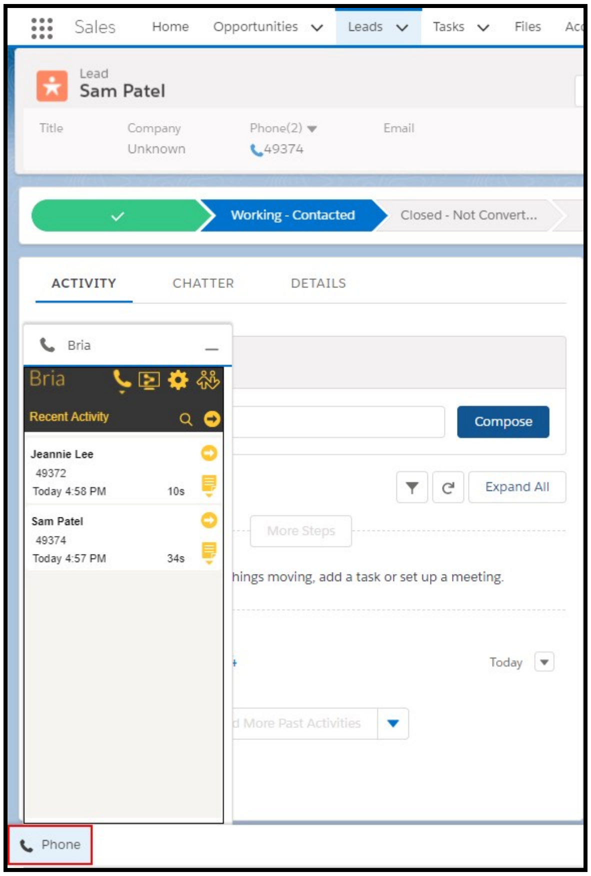


6. Click **Assign to User Profiles** in **APP SETTINGS**.



7. 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.

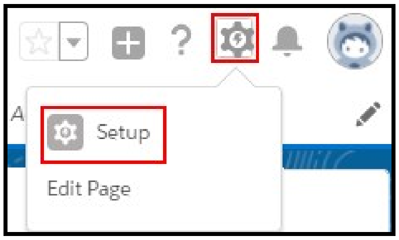


Switching a user to Salesforce Classic - Lightning

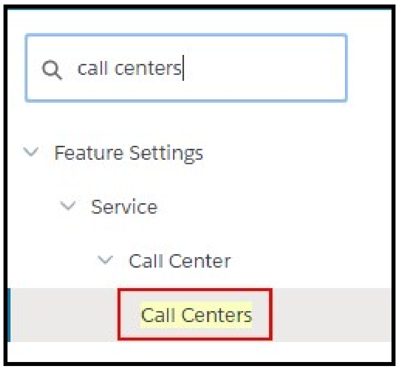
To switch a user back to the Classic experience, the Salesforce admin use has to change a user's call center from BriaLightning to Bria. The Bria Sidebar is only available in the either Salesforce Classic or the Lightning experience. Once Salesforce Classic is enabled, you can switch back to the Lightning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

To change from the BriaLightning to the Bria Call Center

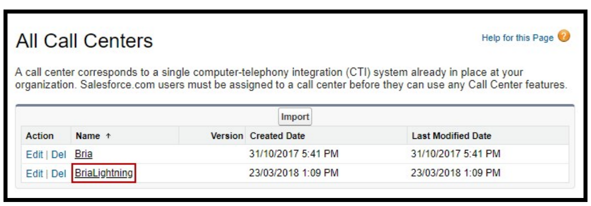
1. Log on to Salesforce as a Salesforce admin.
2. Click **Setup** in the Salesforce user interface header.



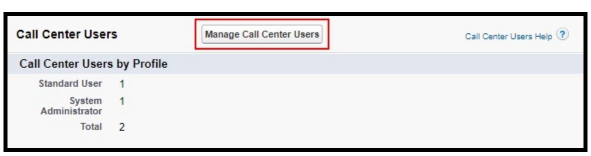
3. Search for **call centers** in **Quick Find** and click **Call Centers**.



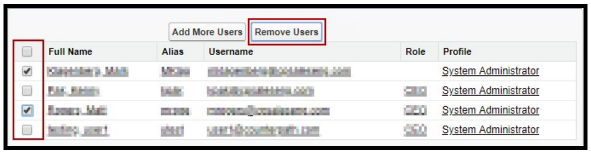
4. Click **BriaLightning** in **All Call Centers**.



5. Click **Manage Call Center Users**.

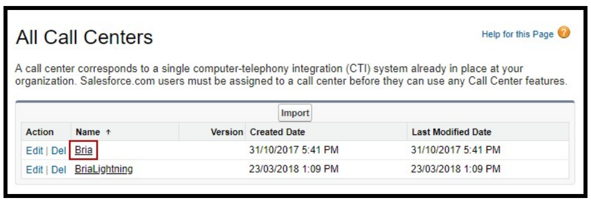


6. Select the users you want to remove from the BriaLightning Call Center and click **Remove Users**.

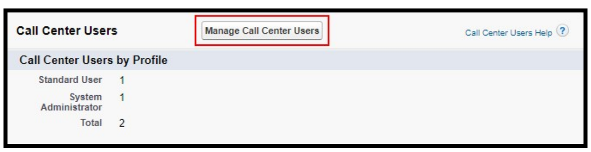


7. Click on **All Call Centers**.

8. Click **Bria** in **All Call Centers**.

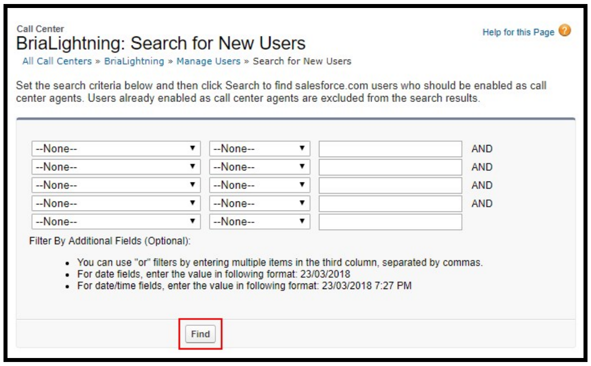


9. Click **Manage Call Center Users**.



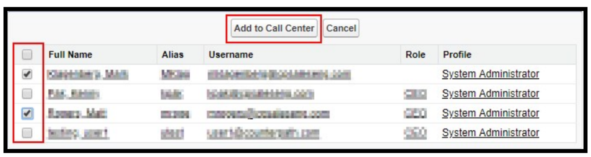
10. Click **Add More Users**.

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**.



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

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

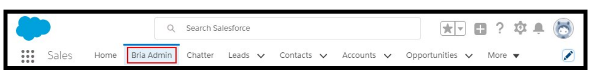
The Bria Sidebar has a field that the sales representative populates during or after a call to capture the result of the call.

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

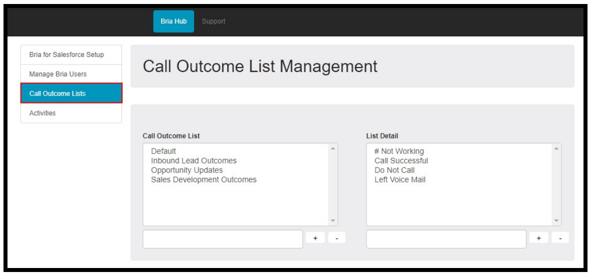
The sales administrator can predefine outcome lists and options for a group. The sales administrator can assign one list for sales representatives according to their role when enabling Bria. End users can switch between lists but they cannot change the options within the list.

To customize a Call Outcome List

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

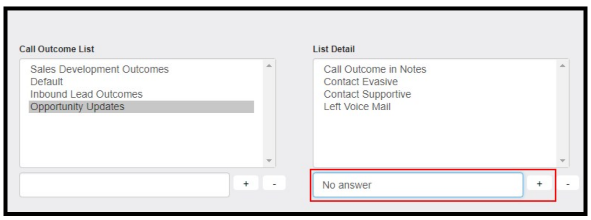
   The **Bria Hub** opens.
3. Click **Call Outcome lists**. Existing call outcomes and the details of each list are displayed.



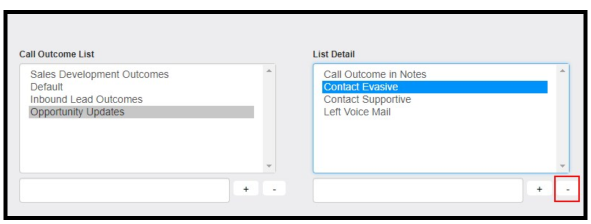
Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

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 **+**.



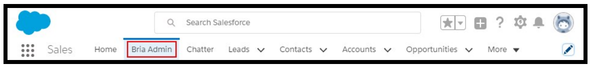
To delete an item from the List Detail, click the item in the list to select it and click **-**.



The **Call Outcome List** is updated.

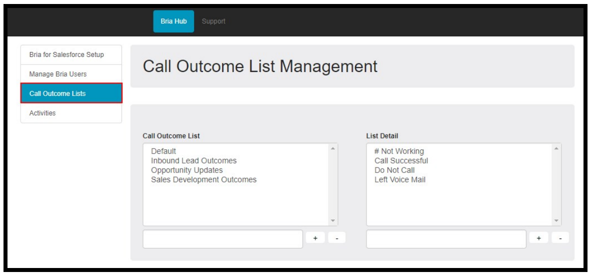
To add a Call Outcome List

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



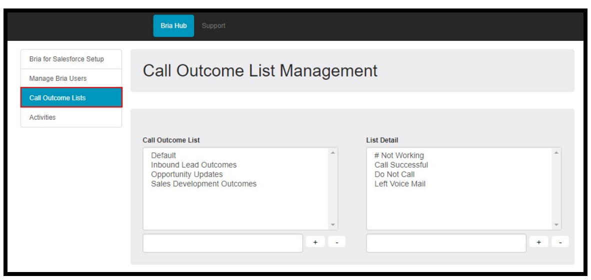
The **Bria Hub** opens.

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



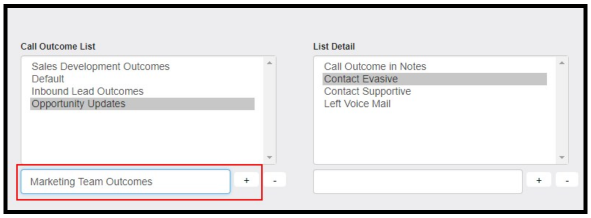
Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

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

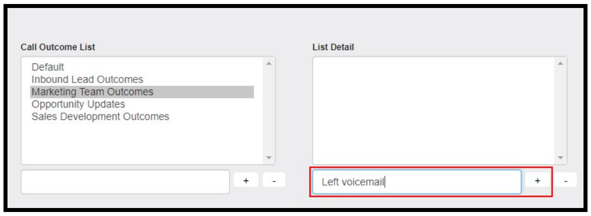


Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

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



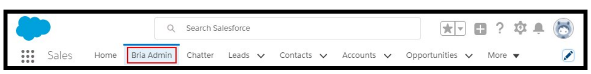
6. Add a new outcomes to the **List Detail** by typing the outcome it in the field below **List Detail** and click **+**.



The **Call Outcome List** and each **List Detail** are added.

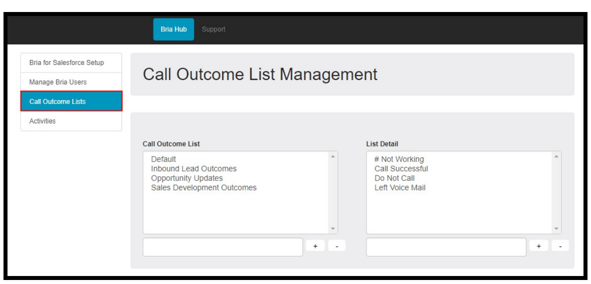
To delete a Call Outcome List

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

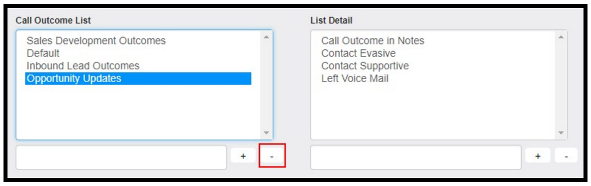


   The **Bria Hub** opens.

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



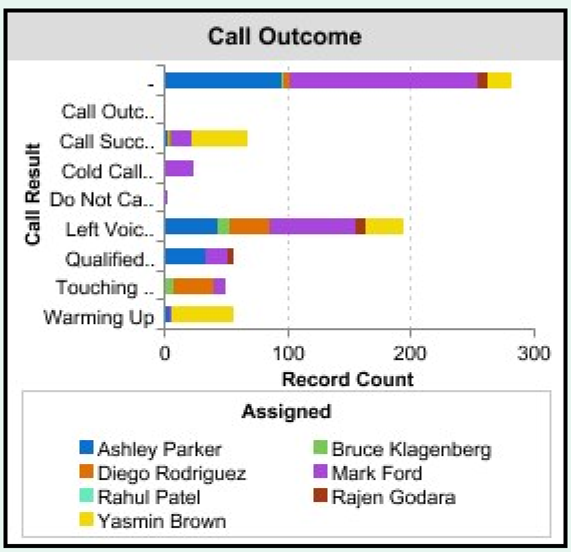
4. Click the Call Outcome List you want to delete and click **-**.



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.

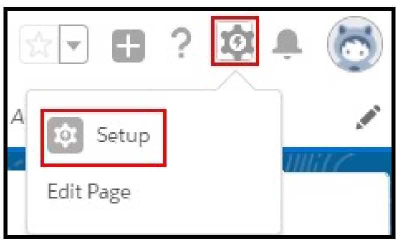
The Bria Email Templates folder

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.

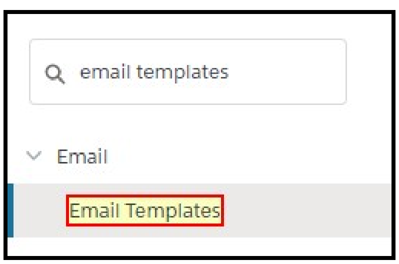
Make sure there is at least one template available for use in the Bria email folder. The templates available for use are shown as options for each sales representative.

To manage Bria Email Templates

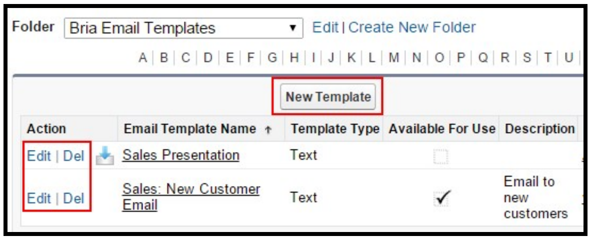
1. Log into Salesforce as a Salesforce admin.
2. Click **Setup** on the Salesforce user interface header.



3. Search for **email templates** and click **Email Templates**.



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



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

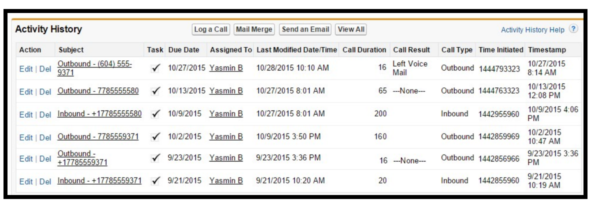
Activities and call logs - Lightning

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.



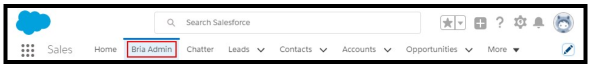
Activity History for your team

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

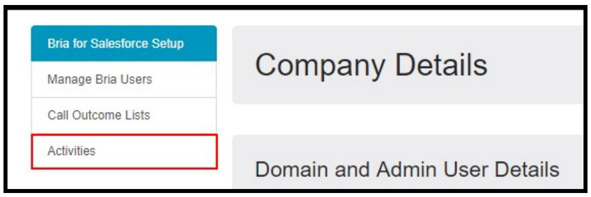
1. Log in to Salesforce as an Salesforce admin.

2. Click **Bria Admin**.



The **Bria Hub** opens.

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



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

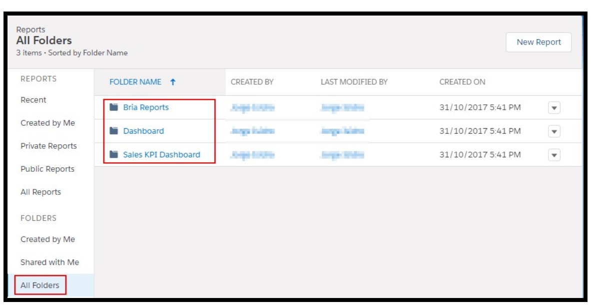
The **Bria Hub** shows a list of **Activities**.

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.



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 – 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**.

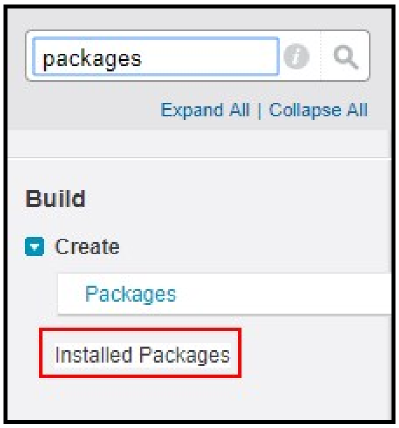
4. Click **Get It Now**.
5. Follow the prompts to install Bria. Choose the **Install for All Users** option.

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**.



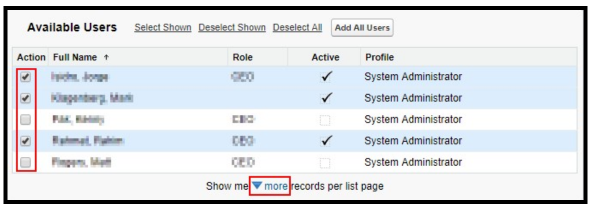
4. Click **Manage Licenses** for the **BriaForSalesforce** package.

5. Click **Add Users**.

A list of **Available Users** appears.

6. Select your user.

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



   Your user shows in the **Selected Users** list.

7. Click **Add**.

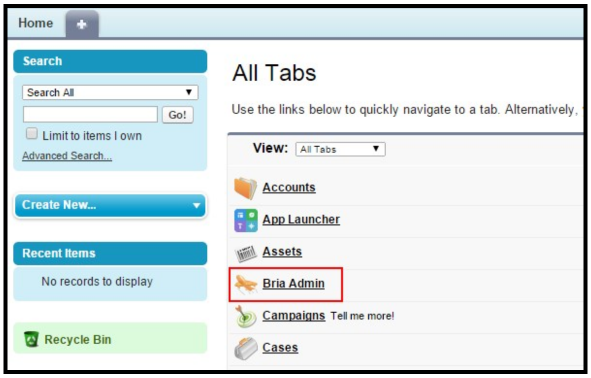
You have a Bria for Salesforce license assigned to them.

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.

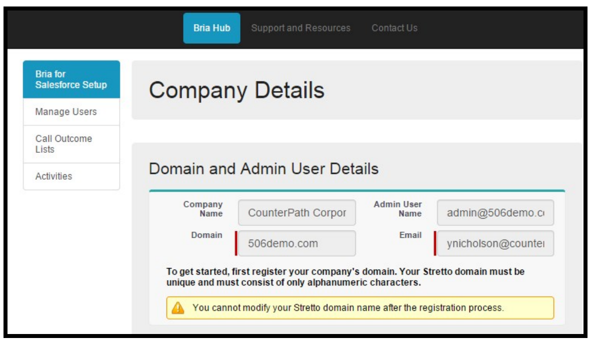
To configure your PBX/SIP server

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



The **Bria Hub** opens.

3. Complete the **Company Details**.



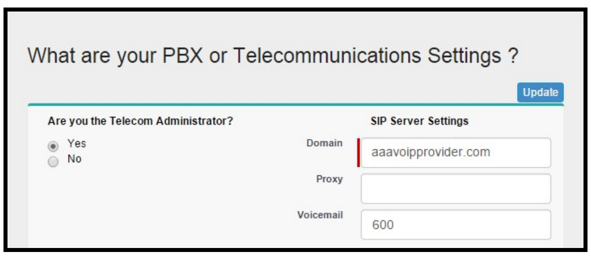
- **Company Name**: Populated from Salesforce.
- **Domain**: The domain for Bria Stretto login. Typically, your organization's domain used for email, such as counterpath.com from yasmin.brown@counterpath.com. Keep it short – all end users need to enter this domain name when logging into the Bria Stretto 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.



5. Click **Update.**

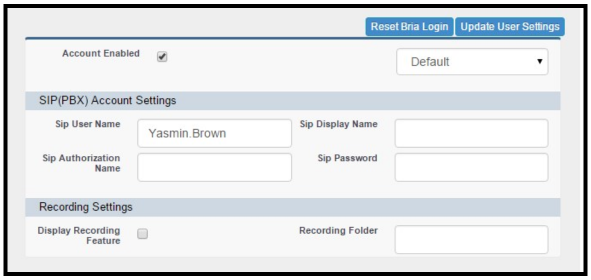
The **Adding First Bria user** screen appears.

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.



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**.

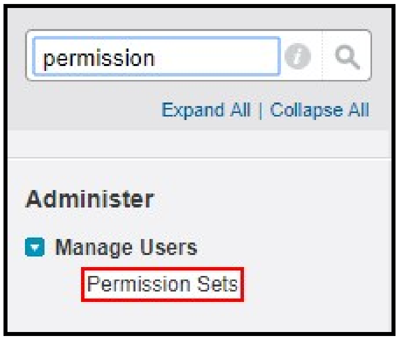
An email is sent with your Bria credentials from Bria/CounterPath to the email account associated with Salesforce.

Assigning the Bria for Salesforce permission set

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

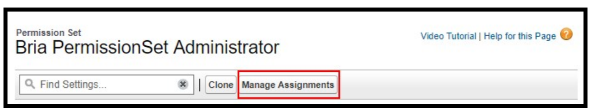
To assign the Bria permission set

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**.

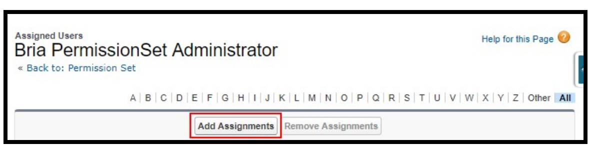


4. Click **Bria for Salesforce PermissionSet Administor**.

5. Click **Manage Assignments**.

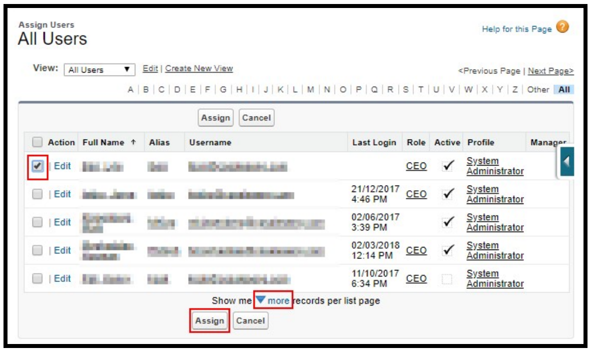


6. Click **Add Assignments**.



7. Select your user and click **Assign**.

   If you do not see your user, click **more**.



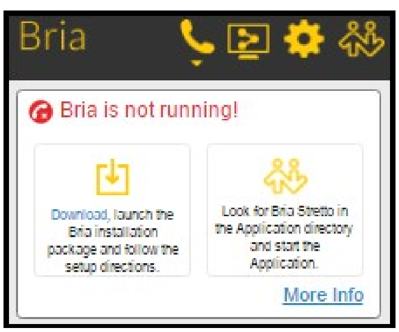
The Bria permission set is assigned to you.

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 – 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

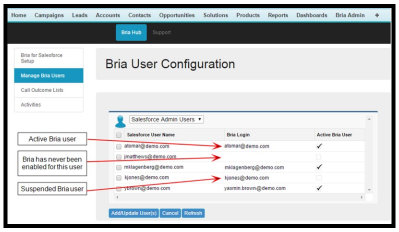
You can review the list of Salesforce users and see whether they are active Bria users. You can enable or suspend Bria for Salesforce for a user, as well as reset their Bria Stretto password from the users list.

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.



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:

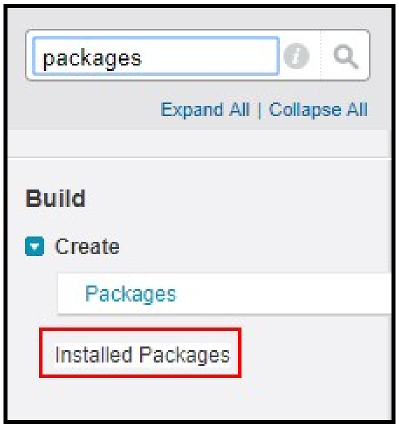
- The SIP username, password, and authorization name (if used by the SIP server)

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.

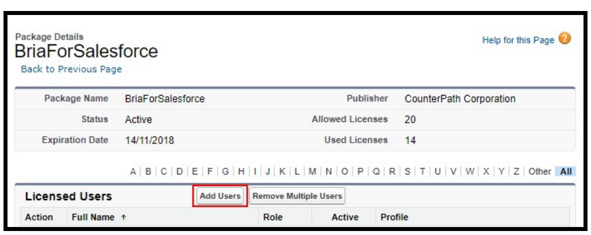
To assign a Bria for Salesforce license

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.

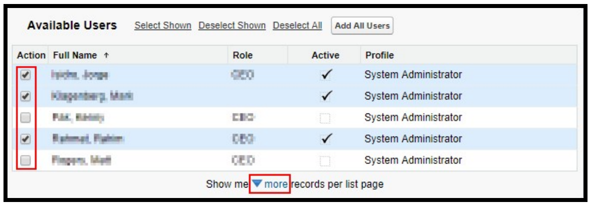
5. Click **Add Users**.



   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**.



The selected users show in the **Selected Users** list.

7. Click **Add**.

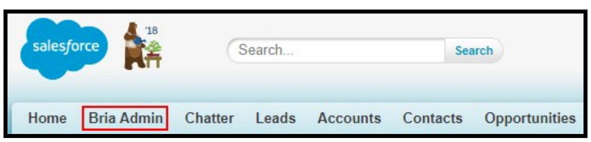
The Salesforce users have a Bria for Salesforce license assigned to them.

Adding Bria users

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

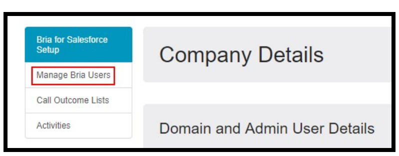
To add Bria for a user

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



The **Bria Hub** opens.

3. Click **Manage Bria Users**.



A list of all Salesforce users appears.

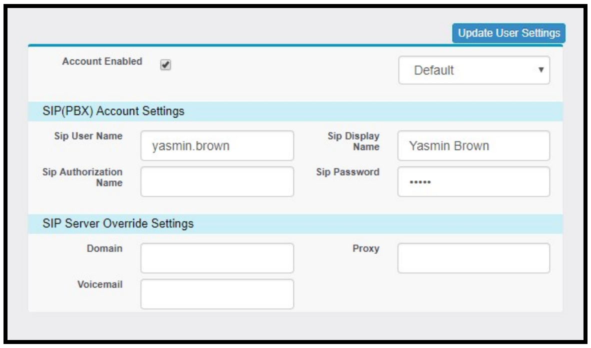
4. Select the user you want to enable Bria for and click **Add/Update User(s)**.

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.



6. Click **Update User Settings**.

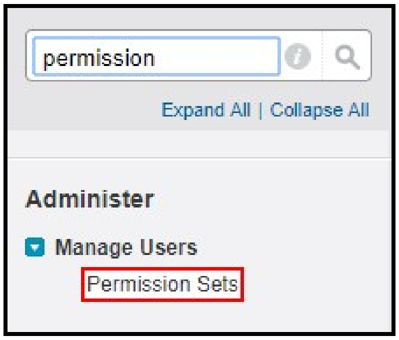
The user receives an email from CounterPath with their Bria login information. To see the latest information in the **Bria Users** list, you may need to refresh your browser or click **Refresh** under the **Bria Users** list.

Assigning the Bria for Salesforce permission set

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

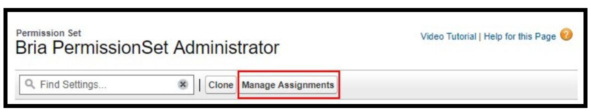
To assign the Bria permission set

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**.

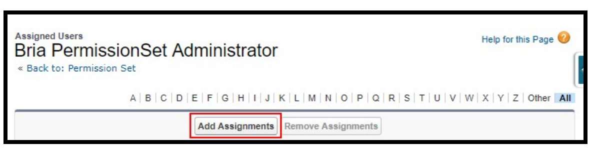


4. Click either the **Bria for Salesforce PermissionSet Administor** or the **Bria PermissionSet Standard User** depending on the permissions you want to assign to users.

5. Click **Manage Assignments**.

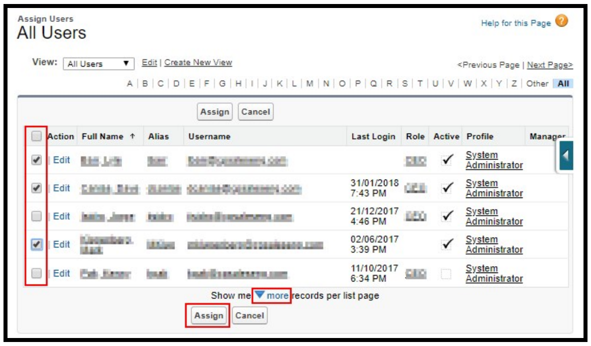


6. Click **Add Assignments**.



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**.



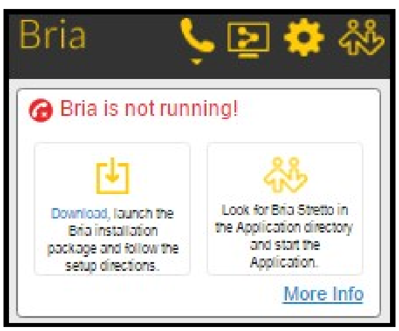
The Bria permission set is assigned to the users.

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**.

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.

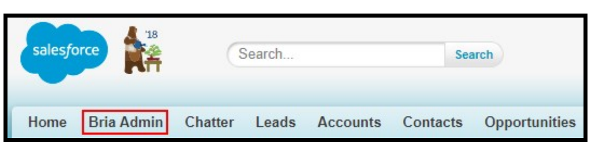
When a sales representative leaves the job, the Salesforce admin typically deletes the person's Salesforce account. If the user is deleted from Salesforce, you do not need to do anything in the **Bria Hub**. The Bria subscription ends for the user when the user is deleted from Salesforce.

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.

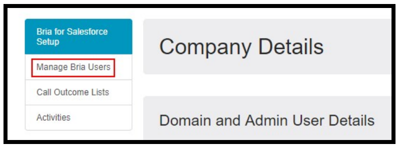
To suspend a user from Bria

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



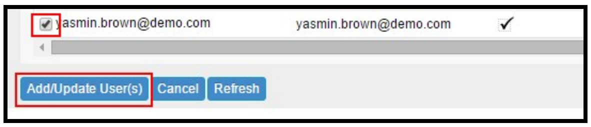
The **Bria Hub** opens.

3. Click **Manage Bria Users**.



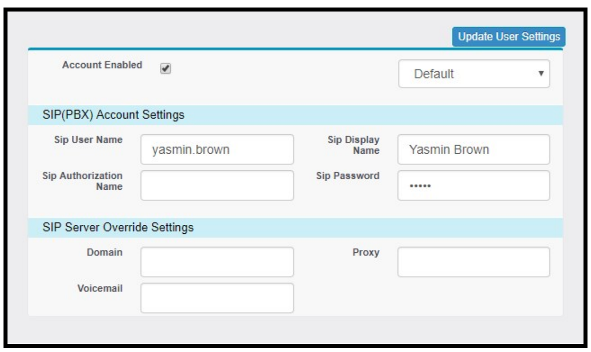
A list of all Salesforce users appears.

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



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

5. Clear **Account Enabled**.



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

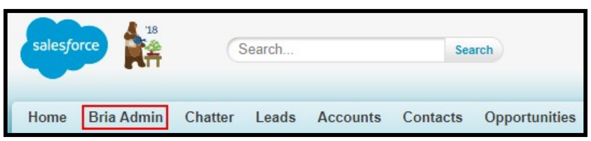
Changing the Salesforce password does not affect Bria. No extra action is required for the user or the sales administrator in order to continue using Bria for Salesforce.

Bria Password

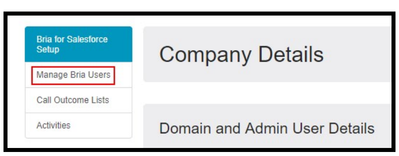
The password for logging into Bria Stretto clients is generated by the CounterPathStretto server and emailed to the individual end user. If the end user forgets the Bria password, the sales administrator can reset the password.

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.

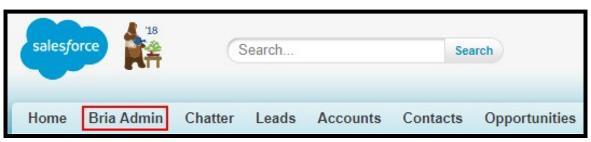
The Bria login password is reset and the end user receives an email with the new password.

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.

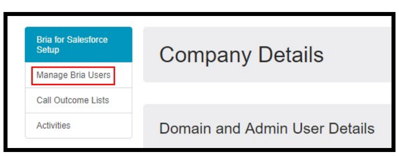
To update the SIP/PBX password

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



The **Bria Hub** opens.

3. Click **Manage Bria Users**.



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.

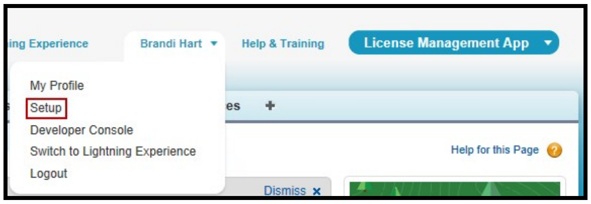
After assigning users to the Bria Call Center, the Salesforce admin has to enable **Open CTI softphone** for BriaLightning and assign user profiles that can access BriaLightning.

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

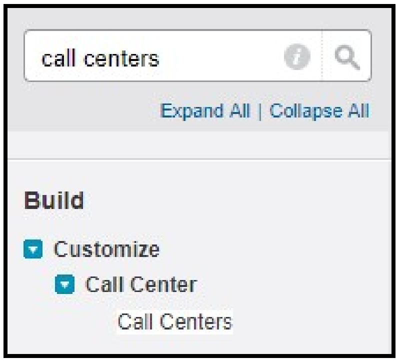
To change from the Bria to the BriaLightning Call Center

1. Log on to Salesforce as a Salesforce admin.

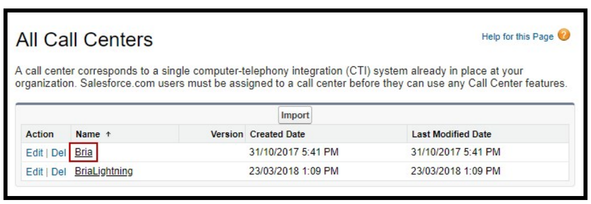
2. Click **Setup** in the Salesforce user interface header.



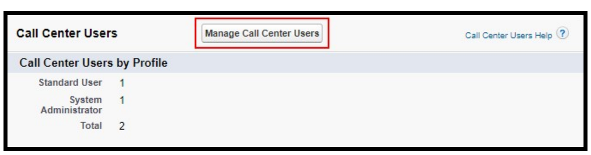
3. Search for **call centers** in **Quick Find / Search** and click **Call Centers**.



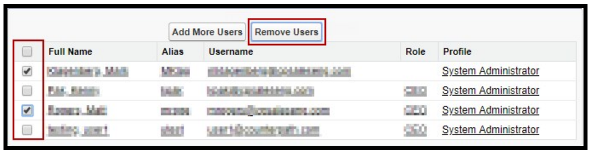
4. Click **Bria** in **All Call Centers**.



5. Click **Manage Call Center Users**.

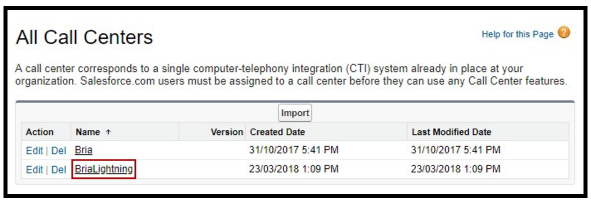


6. Select the users you want to remove from the Bria Call Center and click **Remove Users**.

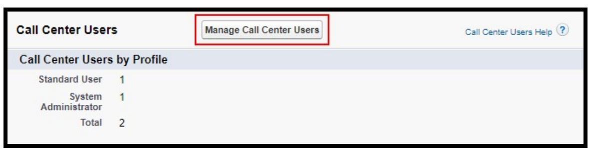


7. Click on **All Call Centers**.

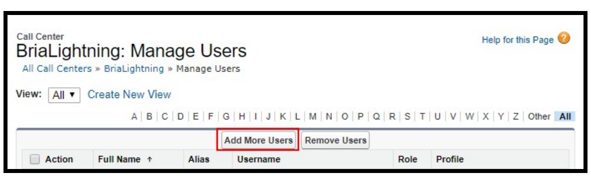
8. Click **BriaLightning** in **All Call Centers**.



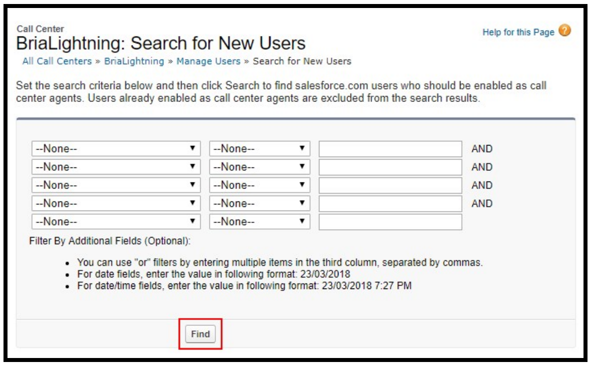
9. Click **Manage Call Center Users**.



10. Click **Add More Users**.

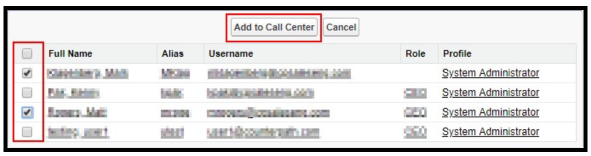


11. Either click **Find** or enter search criteria and click **Find**.

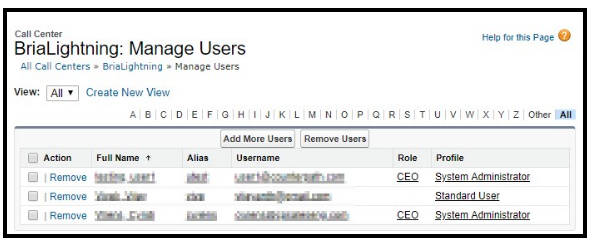


Only users that do not have a call center assigned to them appear in the list.

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



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



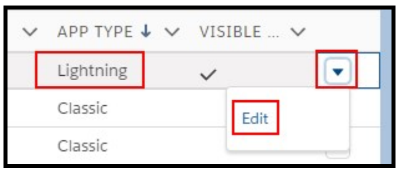
Enabling Open CTI Softphone

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.

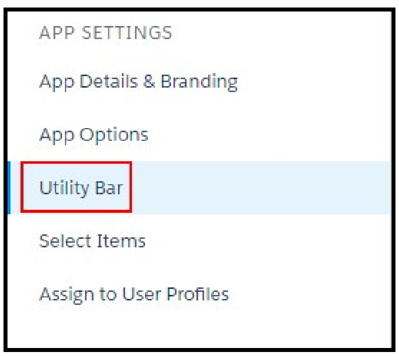
To enable Open CTI Softphone for BriaLightning

1. Log in to Salesforce as a Salesforce admin.

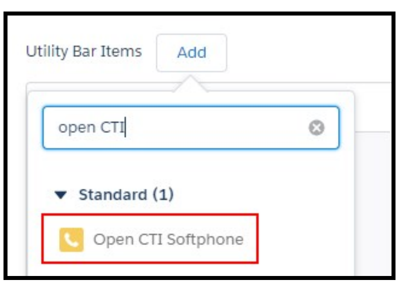
2. Switch to the Lightning Experience.
3. Click **Setup** in the Salesforce user interface header.
4. Search for **App Manger** and click **App Manager**.
5. Click **APP TYPE** to sort apps by the Classic or Lightning experience.
6. Select **Edit** in the drop down beside a Lightning Experience App you 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**.

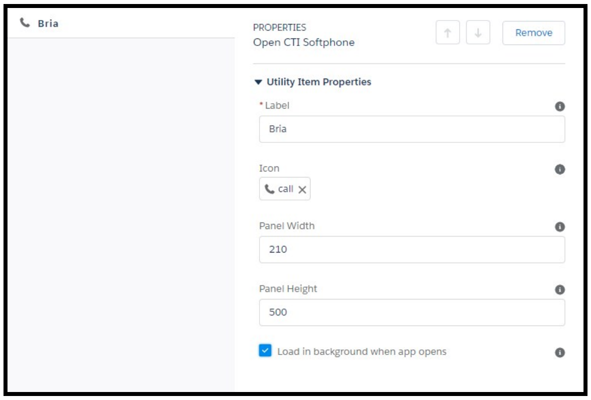


8. Click **Add** and click **Open CTI Softphone**.

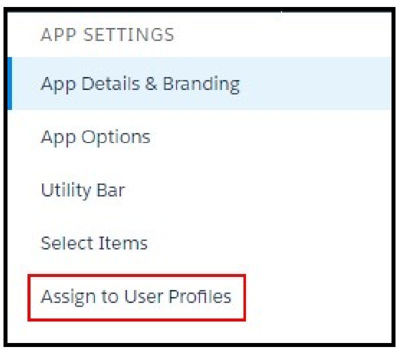


9. Edit the **Properties** for **Open CIT Softphone**. We also recommend using a **Panel**

Width of 210 and a Panel Height of 500.

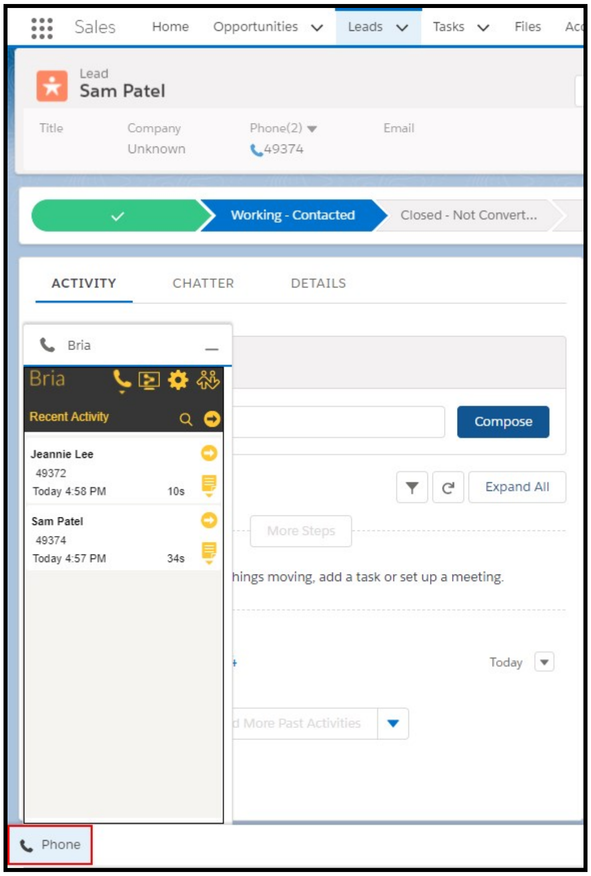


10. Click **Save**.
11. Click **Assign to User Profiles** in **APP SETTINGS**.



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.



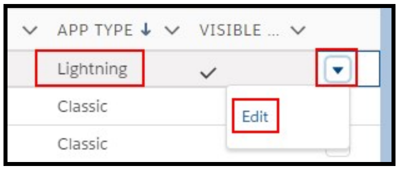
Adding more user profiles to Open CTI Softphone

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**.

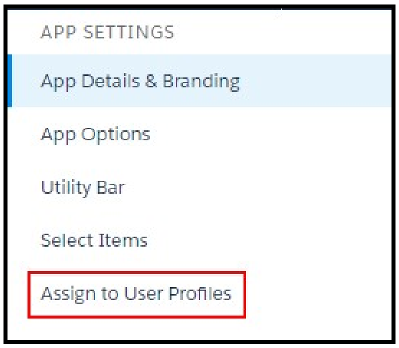
To add user profiles to the BriaLightning app

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.

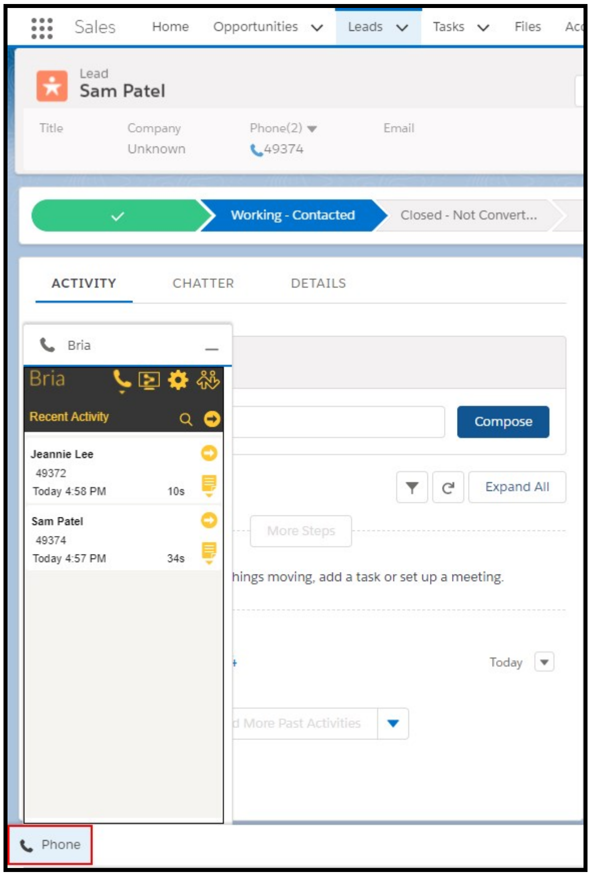


7. Click **Assign to User Profiles** in **APP SETTINGS**.



8. 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.

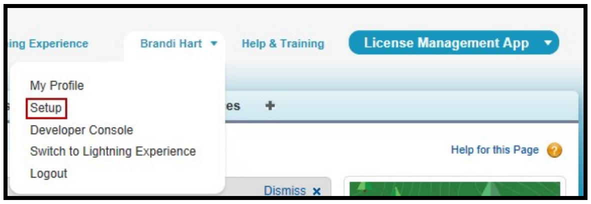


Switching a user to Salesforce Classic - Classic

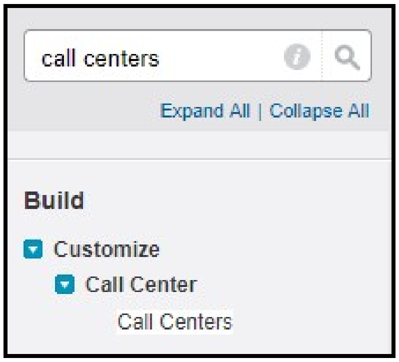
To switch a user back to the Classic experience, the Salesforce admin use has to change a user's call center from BriaLightning to Bria. The Bria Sidebar is only available in the either Salesforce Classic or the Lightning experience. Once Salesforce Classic is enabled, you can switch back to the Lightning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

To change from the BriaLightning to the Bria Call Center

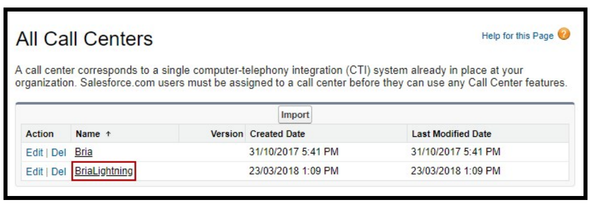
1. Log on to Salesforce as a Salesforce admin.
2. Click **Setup** in the Salesforce user interface header.



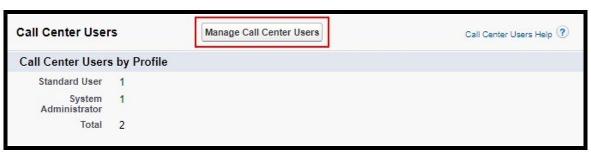
3. Search for **call centers** in **Quick Find / Search** and click **Call Centers**.



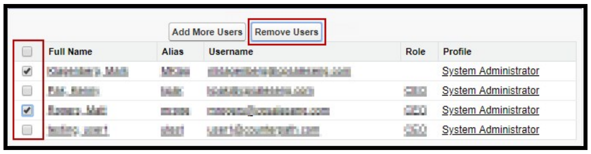
4. Click **BriaLightning** in **All Call Centers**.



5. Click **Manage Call Center Users**.

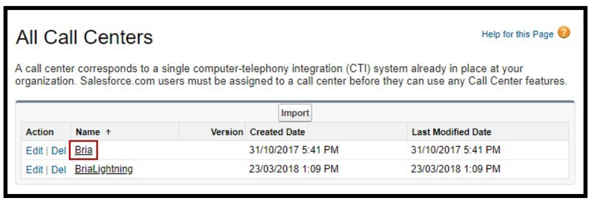


6. Select the users you want to remove from the BriaLightning Call Center and click **Remove Users**.

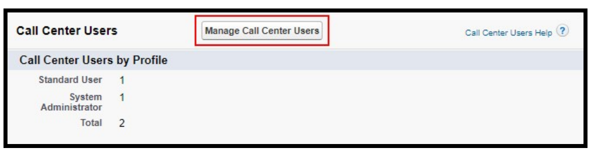


7. Click on **All Call Centers**.

8. Click **Bria** in **All Call Centers**.

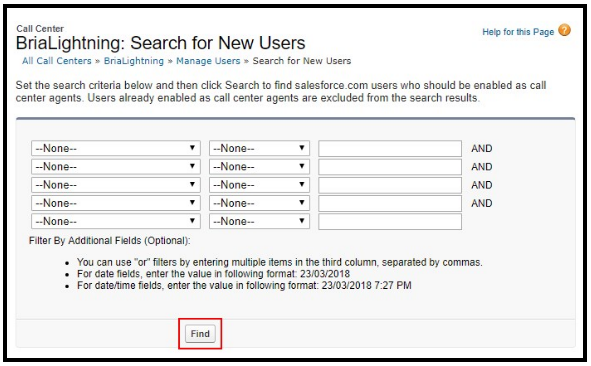


9. Click **Manage Call Center Users**.



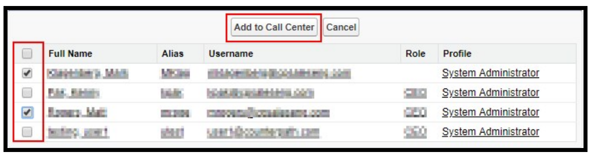
10. Click **Add More Users**.

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**.



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

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

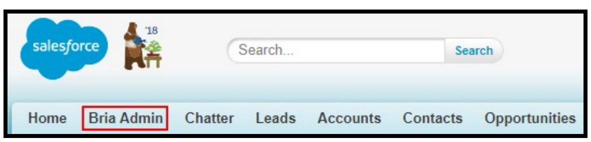
The Bria Sidebar has a field that the sales representative populates during or after a call to capture the result of the call.

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

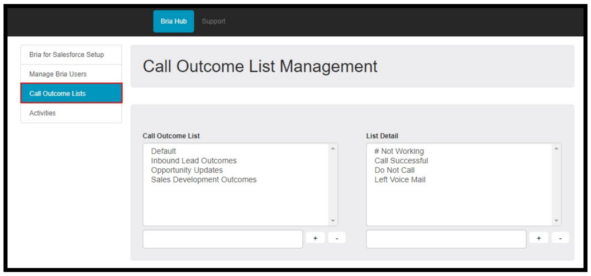
The sales administrator can predefine outcome lists and options for a group. The sales administrator can assign one list for sales representatives according to their role when enabling Bria. End users can switch between lists but they cannot change the options within the list.

To customize a Call Outcome List

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

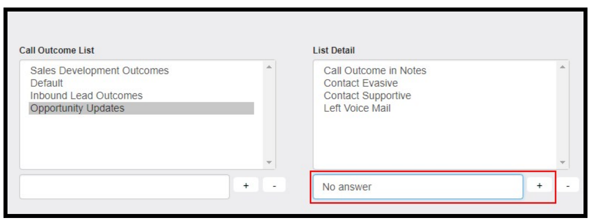
   The **Bria Hub** opens.
3. Click **Call Outcome lists**. Existing call outcomes and the details of each list are displayed.



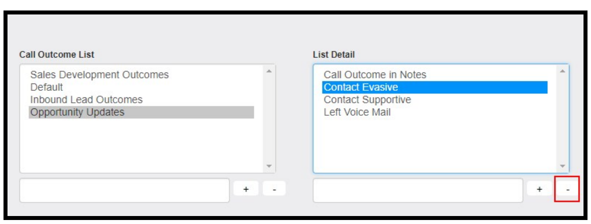
Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

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 **-**.

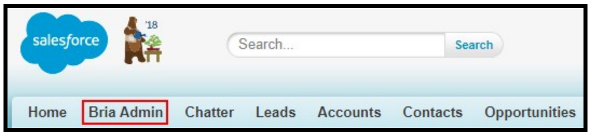


The **Call Outcome List** is updated.

To add a Call Outcome List

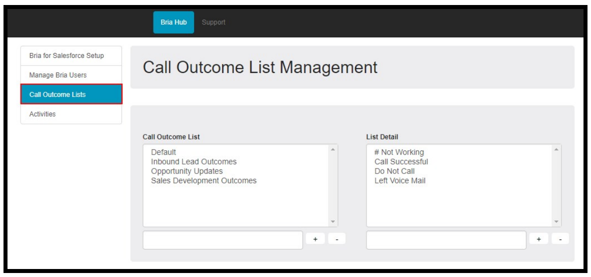
1. Log in to Salesforce as a Salesforce admin.

2. Click **Bria Admin**.



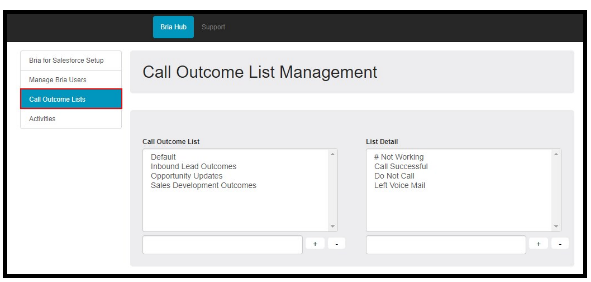
The **Bria Hub** opens.

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



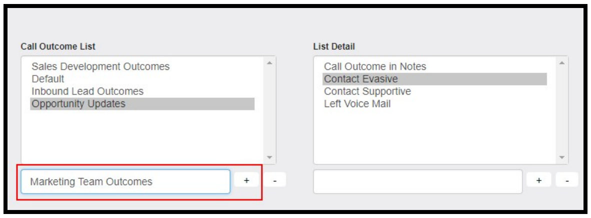
Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

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

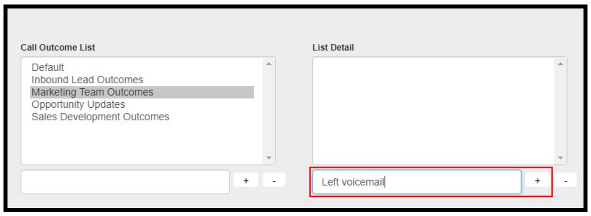


Call Outcome List Management opens and display the existing Call Outcome lists and the details for each list.

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



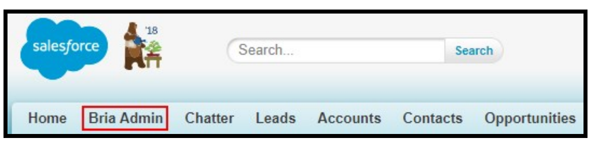
6. Add a new outcomes to the **List Detail** by typing the outcome it in the field below **List Detail** and click **+**.



The **Call Outcome List** and each **List Detail** are added.

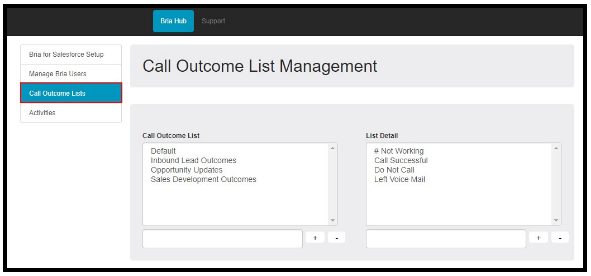
To delete a Call Outcome List

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

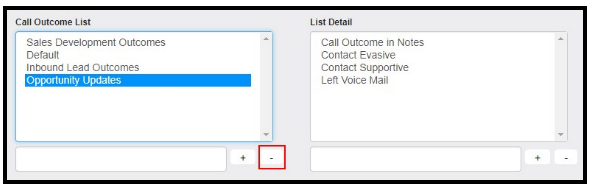


   The **Bria Hub** opens.

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



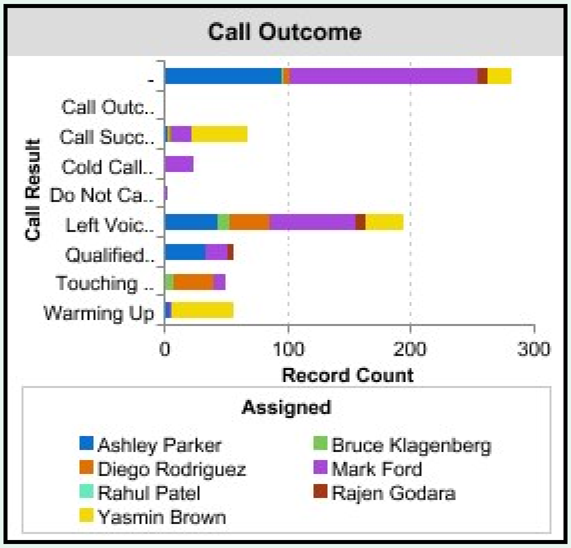
4. Click the Call Outcome List you want to delete and click **-**.



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.

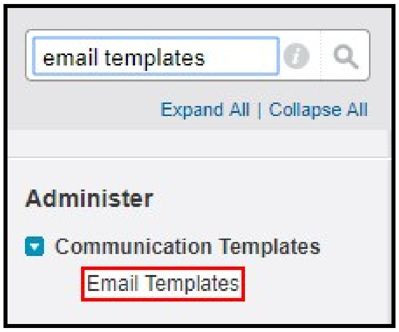
The Bria Email Templates folder

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.

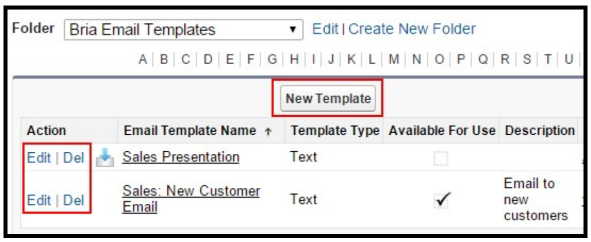
Make sure there is at least one template available for use in the Bria email folder. The templates available for use are shown as options for each sales representative.

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**.



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



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

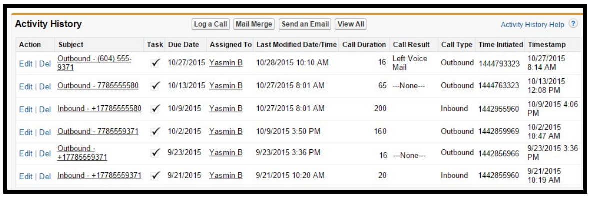
Activities and call logs - Classic

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 History — Log a Call | Mail Merge | Send an Email | View All — Activity History Help

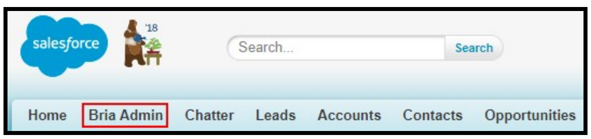
Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time	Call Duration	Call Result	Call Type	Time Initiated	Timestamp
Edit | Del	Outbound - (604) 555-9371	✓	10/27/2015	Yasmin B	10/28/2015 10:10 AM	16	Left Voice Mail	Outbound	1444793323	10/27/2015 8:14 AM
Edit | Del	Outbound - 7785555580	✓	10/13/2015	Yasmin B	10/27/2015 8:01 AM	65	---None---	Outbound	1444763323	10/13/2015 12:08 PM
Edit | Del	Inbound - +17785555580	✓	10/9/2015	Yasmin B	10/27/2015 8:01 AM	200		Inbound	1442955960	10/9/2015 4:06 PM
Edit | Del	Outbound - 7785559371	✓	10/2/2015	Yasmin B	10/9/2015 3:50 PM	160		Outbound	1442859969	10/2/2015 10:47 AM
Edit | Del	Outbound - +17785559371	✓	9/23/2015	Yasmin B	9/23/2015 3:36 PM	16	---None---	Outbound	1442856966	9/23/2015 3:36 PM
Edit | Del	Inbound - +17785559371	✓	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

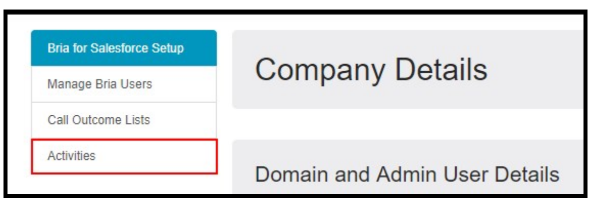
You can view a list of call-related activities for your entire team rather than just for a specified sales representative.

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.

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

The **Bria Hub** shows a list of **Activities**.

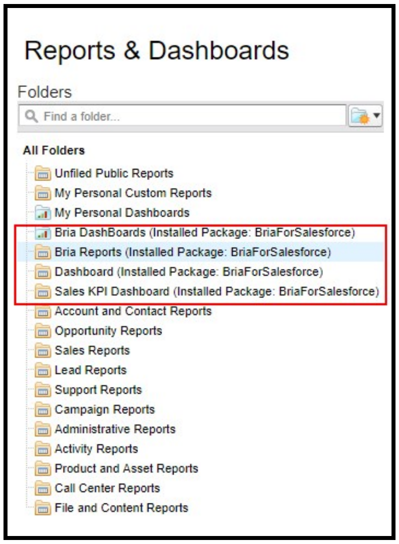
Reports and dashboards – Classic

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.

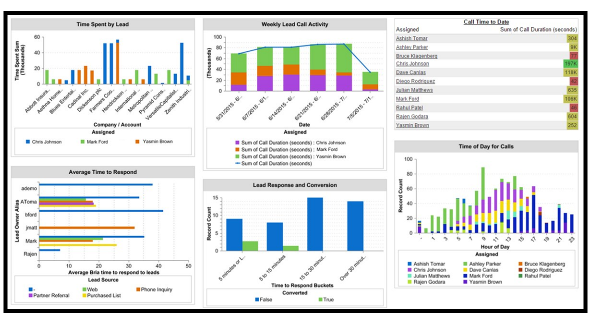
2. Click on the Bria report or dashboard file or folder you want to view.



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.

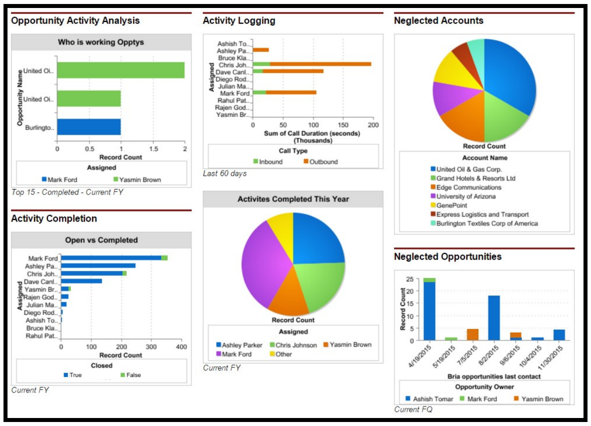
Lead Responses and Conversations

- **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

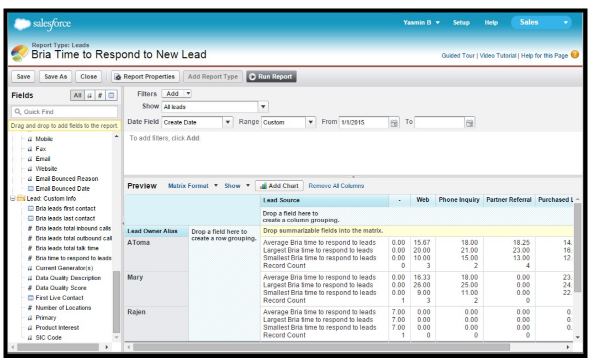
- **Source report**: Bria DB Last Opportunity Contact
- Indicates the last time the team worked on open opportunities.

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 Bria-related fields.



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.

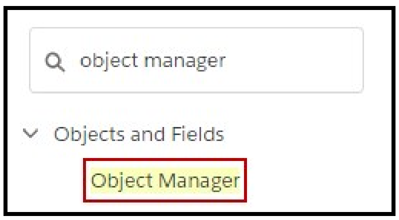
Setting up a Custom Field in Activities

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.

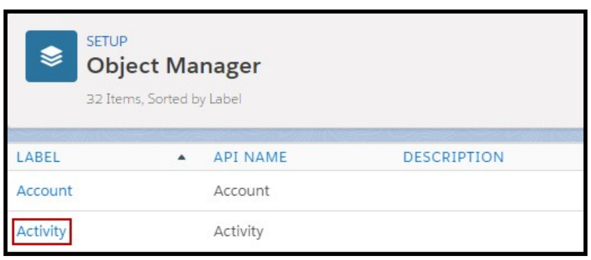
Make sure you are logged in as an administrator and are in **Setup**.

To set up a custom field

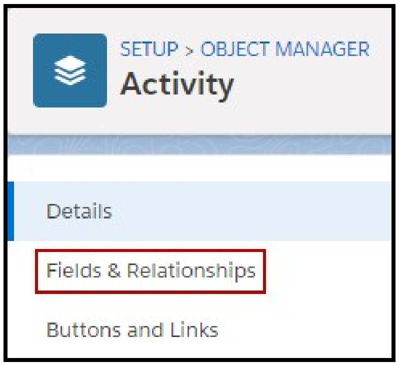
1. Search for **object Manager** in **Quick Find** and click **Object Manager**.



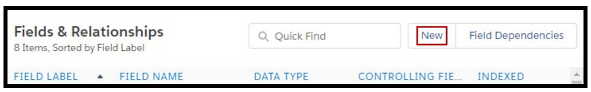
2. Click **Activity** in the **Object Manager**.



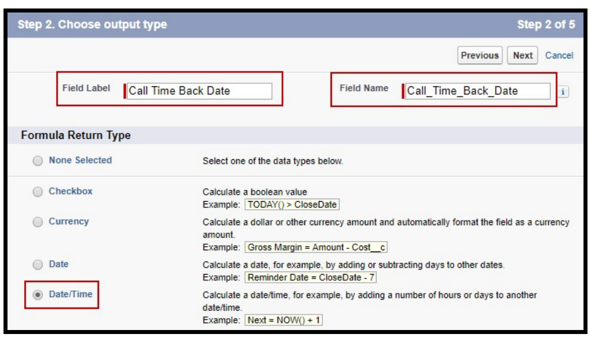
3. Click **Fields & Relationships**.



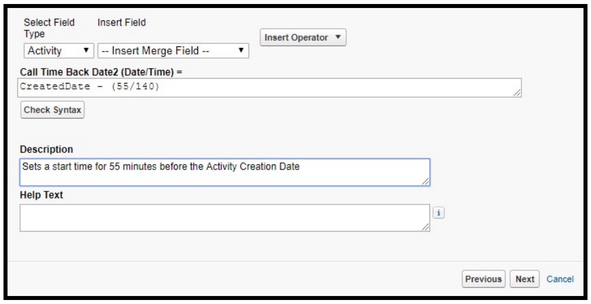
4. Click **New**. The **New Custom Field** wizard opens.



5. Select **Formula** as the **Data Type** and click **Next**.
6. Type **Call Time Back Date** in **Field Label** and press `TAB`. **Field Name** auto-populates. 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**.



> **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

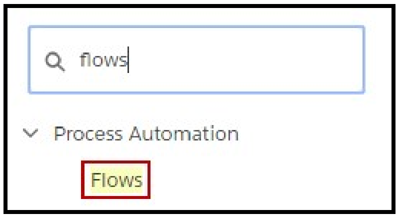
Make sure you are logged in as an administrator and are in **Setup**.

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**.



2. Click **New Flow**.

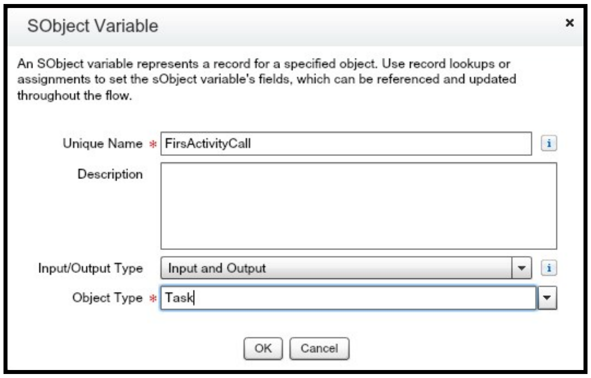
The **Flow Designer** opens.

Creating variables for the flow

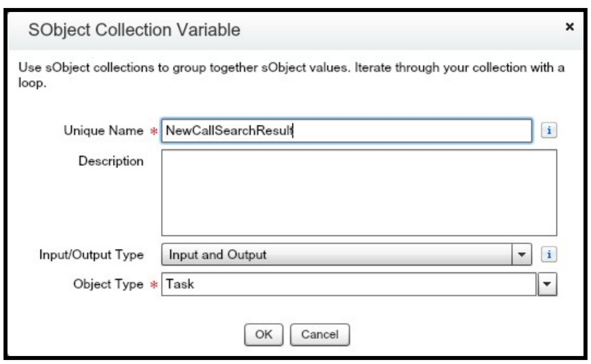
In the flow designer, create an **SObject Variable** and a **SObject Collection Variable**. The **SObject Variable** is used in the **Fast Lookup** element. The **SObject Collection Variable** is used in the **Fast Lookup** element, the **Decision** element, and the **Fast Delete** element.

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**.



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**.



6. Click **OK**.

The **SObject Variable** and the **SObject Collection Variable** are created.

Creating the Fast Lookup element

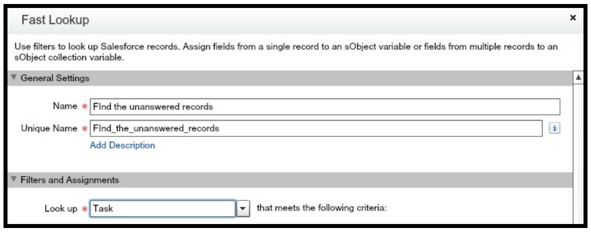
The **Fast Lookup** element is used to determine if there are any incoming calls with a duration of zero seconds. This sections uses the variables you created in Creating variables for the flow.

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** auto-populates. Change **Look up** to **Task**. More fields appear in **Filters and Assignments**.



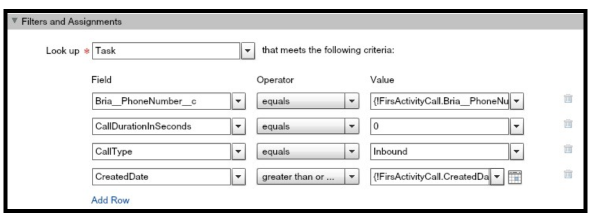
3. Create the following filters (use **Add Row** to add subsequent filters):

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

   Field: CallDurationInSeconds **Operator**: equals **Value**: 0

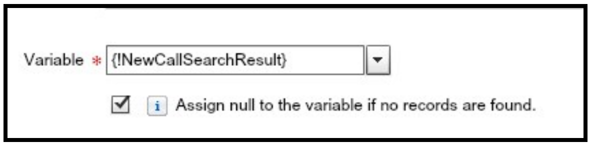
   Field: CallType **Operator**: equals **Value**: Inbound

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



> **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**.



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

The **Fast Lookup** element is created.

Creating the Decision element

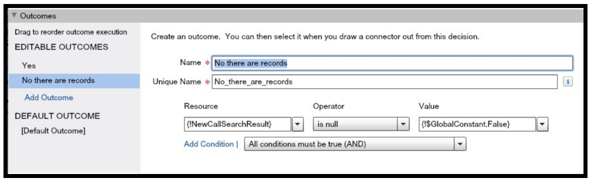
If the **NewCallSearchResult** variable shows calls in it, these related logs need to be deleted. The decision element determines whether or not there are records in the **NewCallSearchResult**.

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}



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

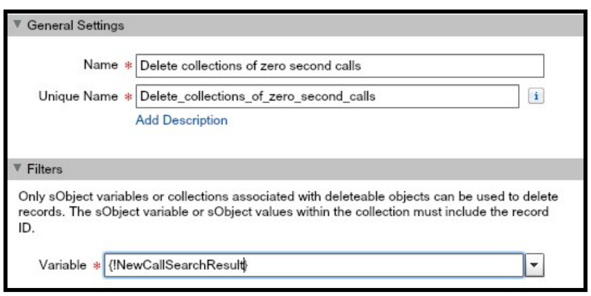
4. Click **OK**.

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.

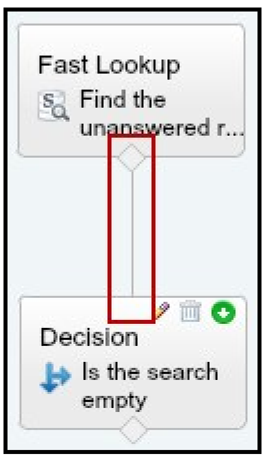
Connecting the elements

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.

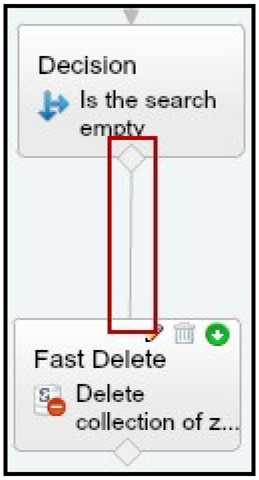
To connect the elements

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**.

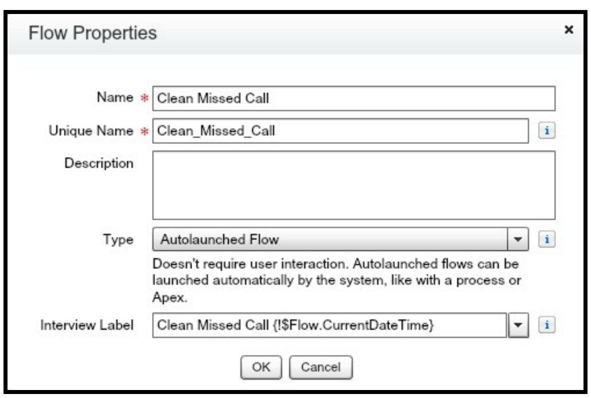


3. Click and drag the diamond at the bottom of **Decision** to **Fast Delete**.



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**.



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

The **Clean Missed Call** flow is activated.

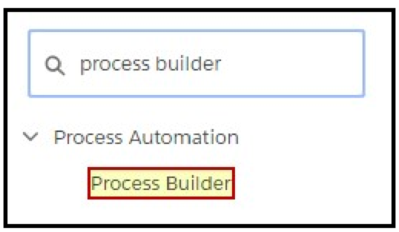
Setting up a Process with Process Builder

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**.

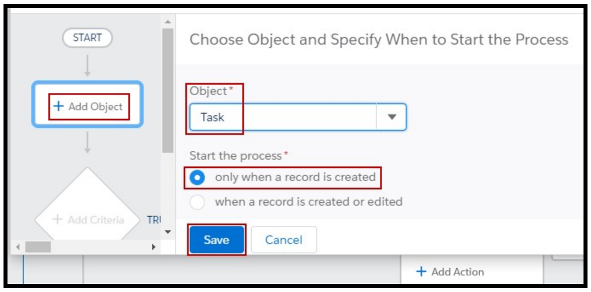


   My Processes opens.

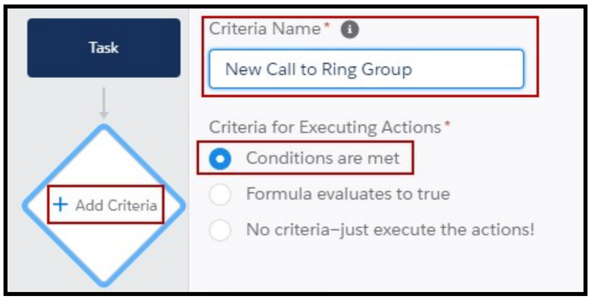
2. Click **New**.

3. Type **Catch Repeat Call Logs** in **Process Name** and type `TAB`. **API Name** 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**.

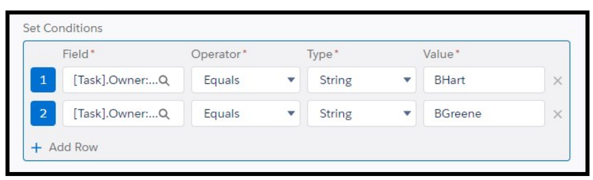


5. Click **Add Criteria**. Type **New Call to Ring Group** in **Criteria Name**. Under **Criteria for Excluding Actions** select **Conditions are met**.

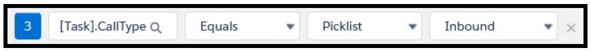


6. Use **Field**, **Operator**, **Type**, and **Value** to create a condition or a group of conditions that includes all users in the ring group. Some of the choices you could use are User ID, User Profile, Department, Division, or User Role.

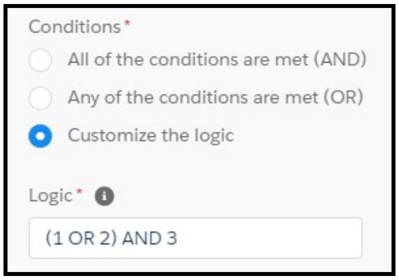
   This example uses **Assigned To ID (User)** > **Alias** to get the **Field**: [Task].Owner.User.Alias. **Operator**: Equals **Type**: String **Value**: *<User Alias in Ring Group>* for each user in the ring group.



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

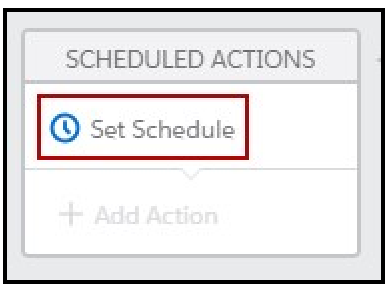


8. In **Conditions**, select the option that includes each user and inbound calls. If you used one condition to include all the users of the ring group, **use All of the conditions are met (AND)**. If you used more than one condition to include all the users, you need an OR for each of the users and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

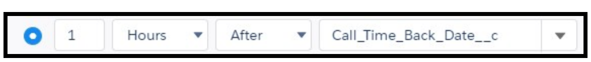


9. Click **Save**.

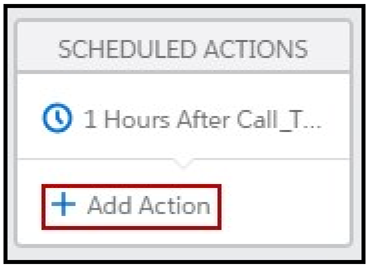
10. Click **Set Schedule** in **Scheduled Actions**.



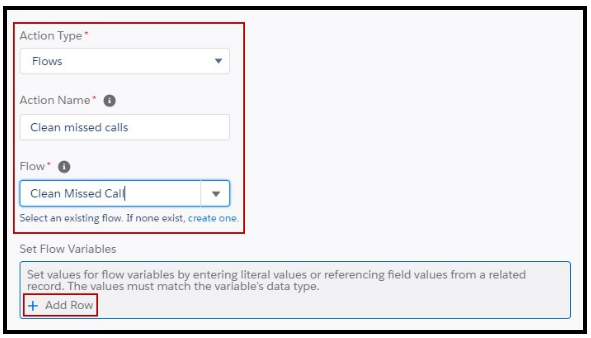
11. Complete **Set Time for Actions to Execute** as **1 Hours After** and select **Call Time Back Date** in **Select a date…** and click **Save**.



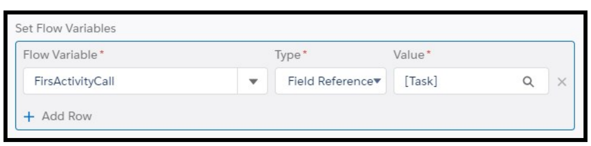
12. Click **Add Action** in the same **Scheduled Actions** box.



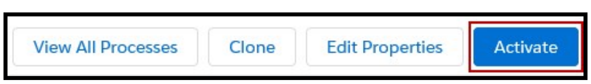
13. Select **Flows** in **Action Type**. **Action Name** and **Flow** appear. Type **Start the cleaning flow** in **Action Name** and select **Clean Missed Calls** in **Flow**. Click **Add Row** in **Set Flow Variables**.



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**.



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.

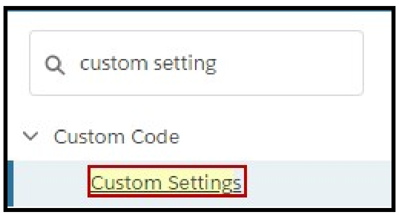
Controlling whether Salesforce creates a new lead for every call – Lightning

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

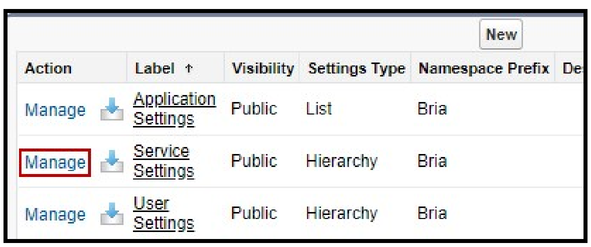
Make sure you are logged in as an administrator and are in **Setup**.

To control new leads

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



2. Click **Manage** next to **Service Settings**.



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**.

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.

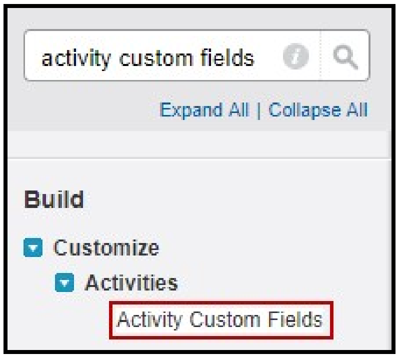
Setting up a Custom Field in Activities

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.

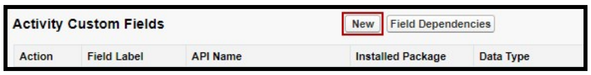
Make sure you are logged in as an administrator and are in **Setup**.

To set up a custom field

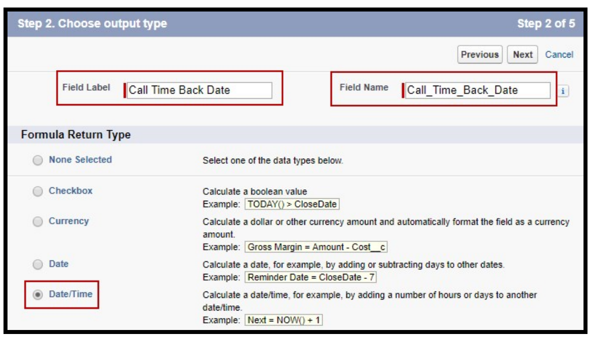
1. Search for **activity custom fields** in **Quick Find / Search** and click **Activity Custom Fields**.



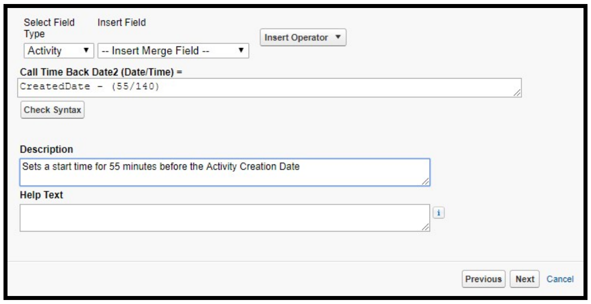
2. Click **New**. The **New Custom Field** wizard opens.



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



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**.



> **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

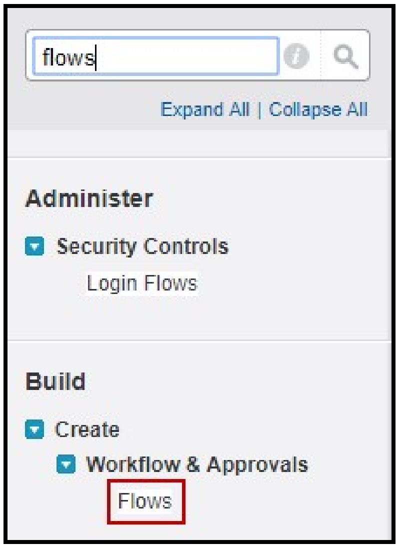
Make sure you are logged in as an administrator and are in **Setup**.

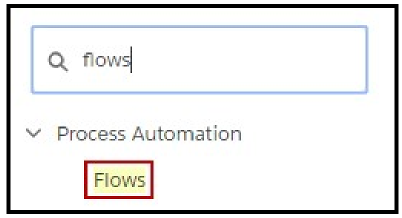
Creating a new flow

Creating a new flow opens the **Flow Designer**.

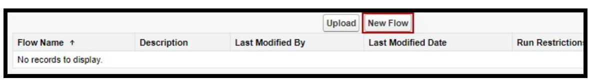
To create a New Flow

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





2. Click **New Flow**.



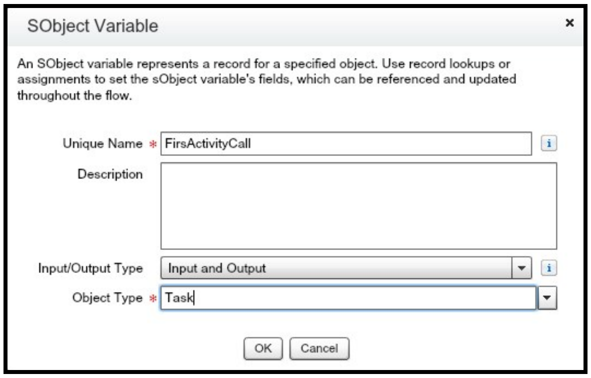
The **Flow Designer** opens.

Creating variables for the flow

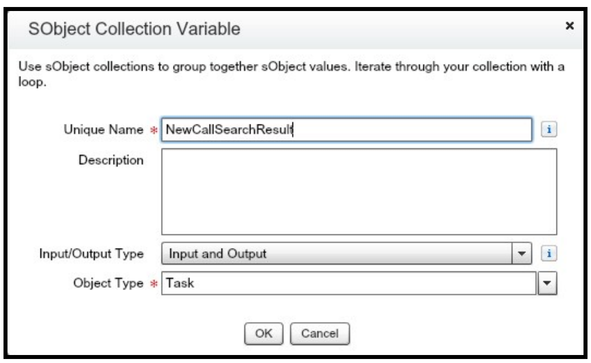
In the flow designer, create an **SObject Variable** and a **SObject Collection Variable**. The **SObject Variable** is used in the **Fast Lookup** element. The **SObject Collection Variable** is used in the **Fast Lookup** element, the **Decision** element, and the **Fast Delete** element.

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**.



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**.



6. Click **OK**.

The **SObject Variable** and the **SObject Collection Variable** are created.

Creating the Fast Lookup element

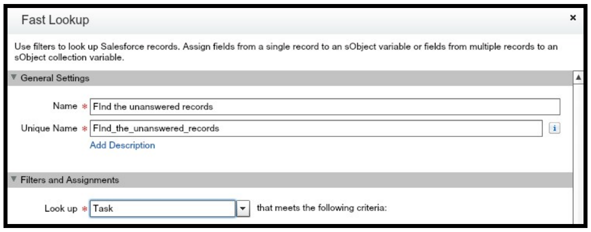
The **Fast Lookup** element is used to determine if there are any incoming calls with a duration of zero seconds. This sections uses the variables you created in Creating variables for the flow.

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** auto-populates. Change **Look up** to **Task**. More fields appear in **Filters and Assignments**.



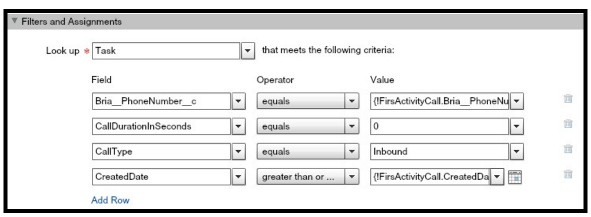
3. Create the following filters (use **Add Row** to add subsequent filters):

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

   Field: CallDurationInSeconds **Operator**: equals **Value**: 0

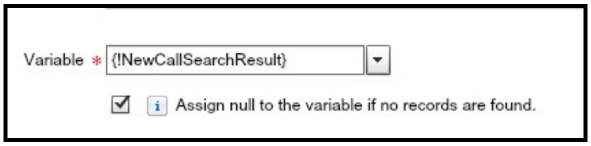
   Field: CallType **Operator**: equals **Value**: Inbound

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



> **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**.



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

The **Fast Lookup** element is created.

Creating the Decision element

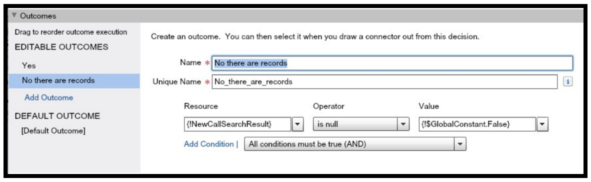
If the **NewCallSearchResult** variable shows calls in it, these related logs need to be deleted. The decision element determines whether or not there are records in the **NewCallSearchResult**.

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}



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

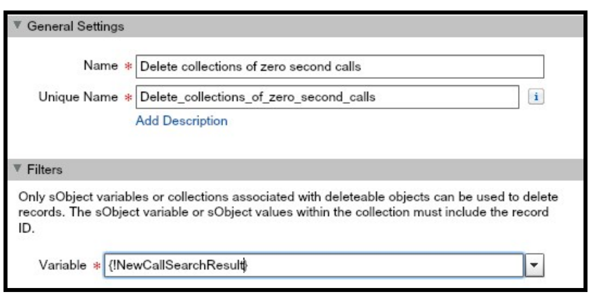
4. Click **OK**.

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.

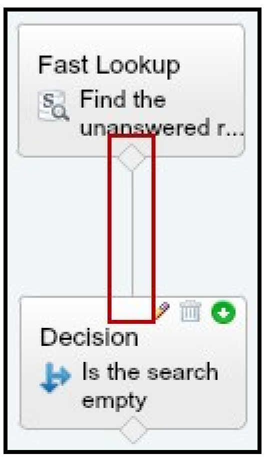
Connecting the elements

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.

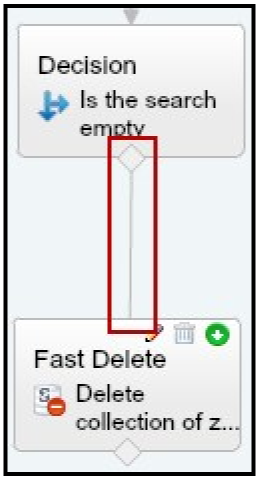
To connect the elements

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**.

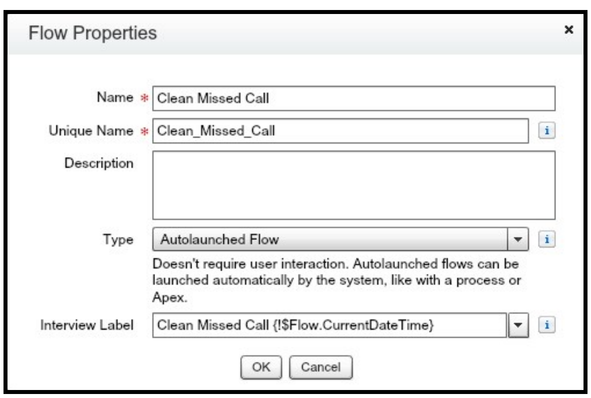


3. Click and drag the diamond at the bottom of **Decision** to **Fast Delete**.



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**.



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

The **Clean Missed Call** flow is activated.

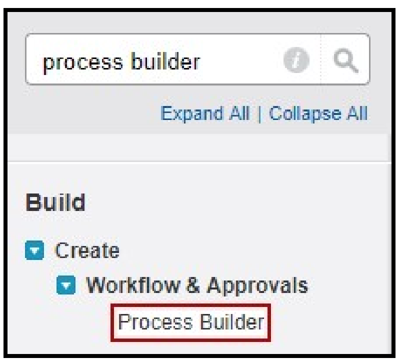
Setting up a Process with Process Builder

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**.



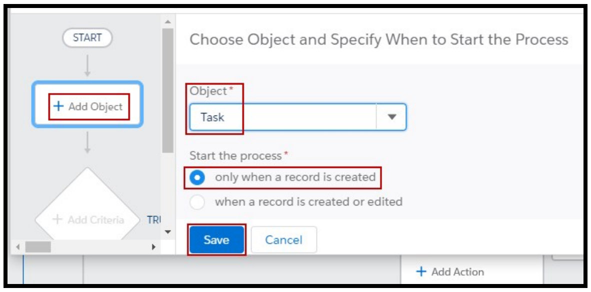
   My Processes opens.

2. Click **New**.

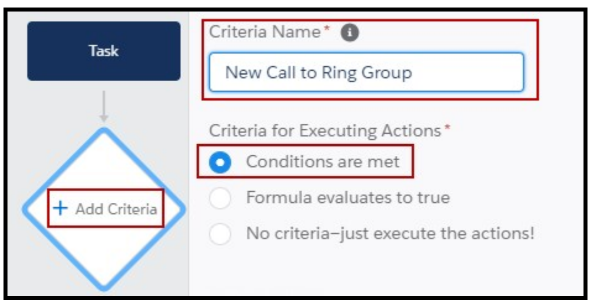
3. Type **Catch Repeat Call Logs** in **Process Name** and type `TAB`. **API Name** auto-

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**.

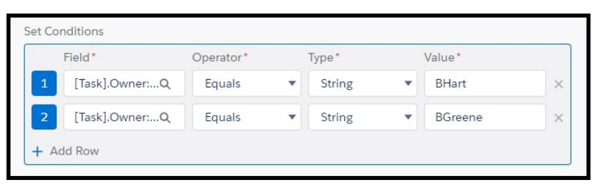


5. Click **Add Criteria**. Type **New Call to Ring Group** in **Criteria Name**. Under **Criteria for Excluding Actions** select **Conditions are met**.



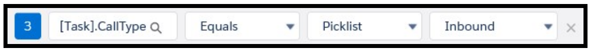
6. Use **Field**, **Operator**, **Type**, and **Value** to create a condition or a group of conditions that includes all users in the ring group. Some of the choices you could use are User ID, User Profile, Department, Division, or User Role.

   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.

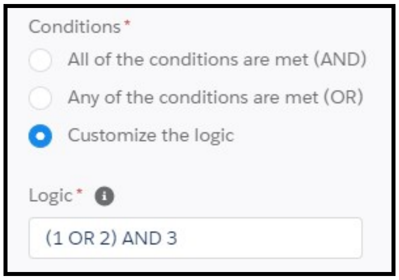


7. Create a condition to for inbound calls. **Field**: [Task].CallType **Operator**: Equals

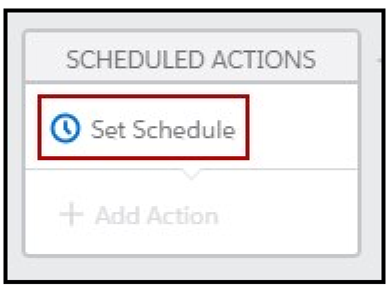
Type: Picklist **Value**: Inbound.



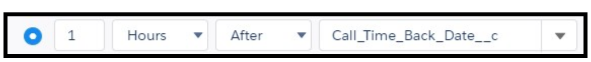
8. In **Conditions**, select the option that includes each user and inbound calls. If you used one condition to include all the users of the ring group, **use All of the conditions are met (AND)**. If you used more than one condition to include all the users, you need an OR for each of the users and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



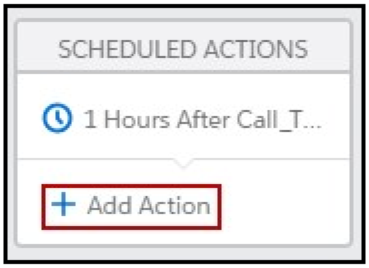
9. Click **Save**.
10. Click **Set Schedule** in **Scheduled Actions**.



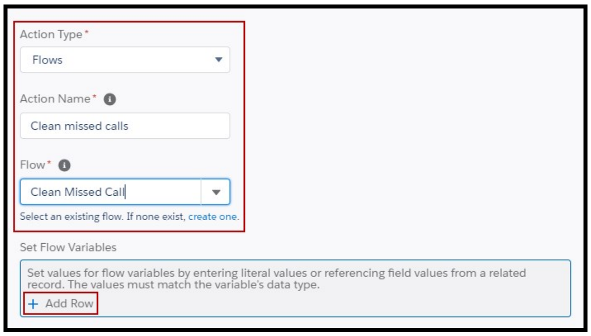
11. Complete **Set Time for Actions to Execute** as **1 Hours After** and select **Call Time Back Date** in **Select a date…** and click **Save**.



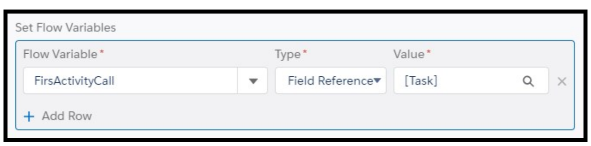
12. Click **Add Action** in the same **Scheduled Actions** box.



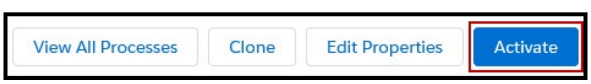
13. Select **Flows** in **Action Type**. **Action Name** and **Flow** appear. Type **Start the cleaning flow** in **Action Name** and select **Clean Missed Calls** in **Flow**. Click **Add Row** in **Set Flow Variables**.



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**.



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.

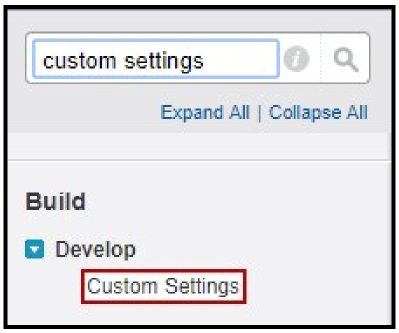
Controlling whether Salesforce creates a new lead for every call – Classic

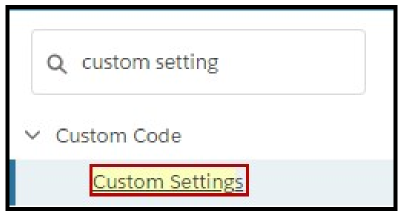
You can control whether a new lead is created for every call.

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

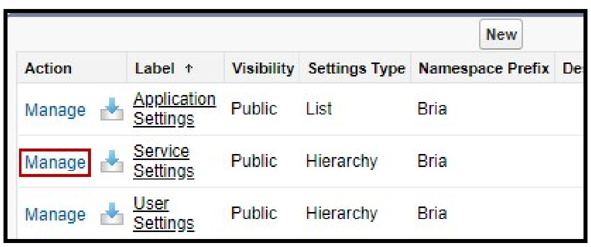
To control new leads

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





2. Click **Manage** next to **Service Settings**.



Action	Label ↑	Visibility	Settings Type	Namespace Prefix	De
Manage	Application Settings	Public	List	Bria	
Manage	Service Settings	Public	Hierarchy	Bria	
Manage	User 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**.

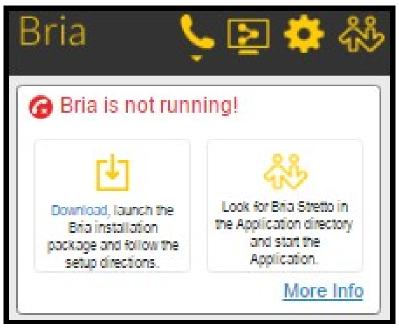
Bria for Salesforce is set to control new leads.

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

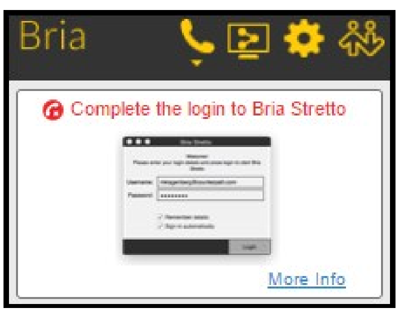


Either Bria is not installed, or Bria is installed but not running.

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.

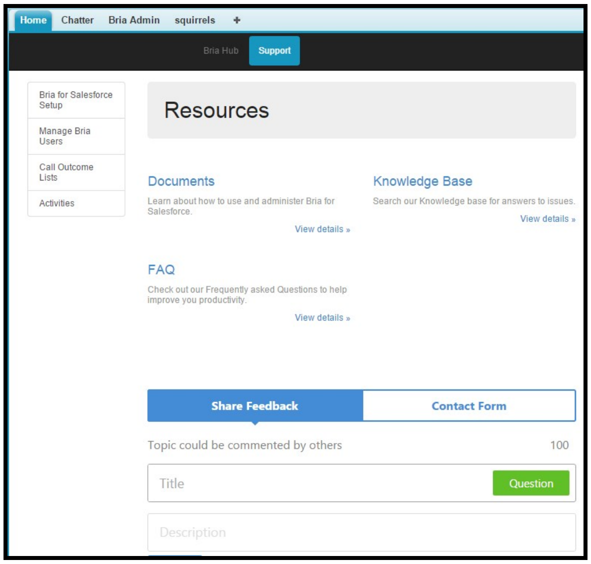
Solution

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.

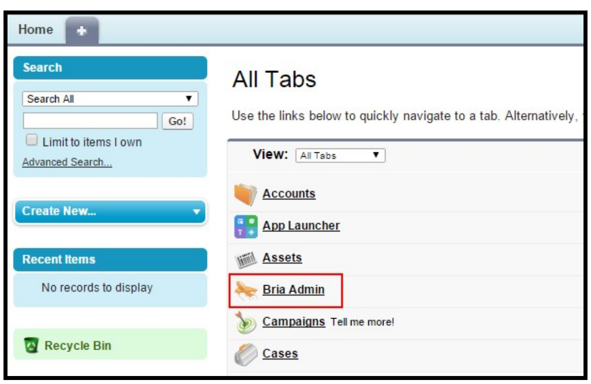
Contacting support

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.



To contact support – Classic

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

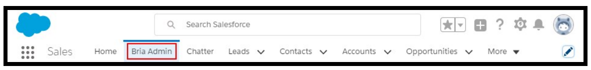


The **Bria Hub** opens.

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.

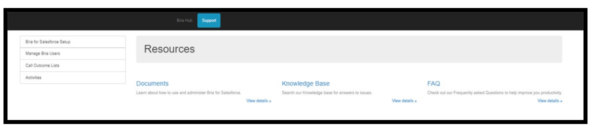
To contact support - Lightning

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