

# 1 About the Bria Add-in

The CounterPath Bria Add-in *for Microsoft Outlook®* (Bria Add-in) enhances Outlook with softphone capabilities, so you can make and receive calls through Outlook using your computer headset or speaker and microphone.



Bria Add-in supports all standard telephone features and many advanced features, including:

- Multiple simultaneous calls
- Call display
- Call transfer
- Call forwarding
- Redial
- Call hold
- Call history
- Missed call indicator
- Message waiting indicator (MWI) and easy access to voicemail
- Speakerphone and mute

Up to 10 simultaneous phone calls.

## 1.1 Copyright Notice and Disclaimer

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The contents of this publication are intended to demonstrate typical uses and capabilities of the Bria Add-in *for Microsoft Outlook* from CounterPath Corporation. Users of this material must determine for themselves whether the information contained herein applies to a particular IP-based networking system.

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## Version

This help system corresponds to Bria Add-in *for Microsoft Outlook* version 1.1.

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## 1.2 Tips for your Comfort and Safety



**WARNING:** Do not use this product during an electrical storm. There is a remote chance of electric shock from lightning. There is also a remote chance of hearing loss in the event of a lightning strike.

## Protect Your Hearing



**WARNING:** Excessive volume can cause permanent hearing loss. Adjust the speaker volume to a comfortable level before using this product.

# 2 Getting Started

After you have installed Bria Add-in on your computer, you must restart Outlook. You will see the Bria Add-in toolbar in Outlook's main window.

Before you can use Bria Add-in to make and receive calls, you must:

- Activate your license. In the Actions menu, select License and paste (or type) your license key. The License option disappears from the Actions menu once Bria Add-in is licensed.
- [Configure the account](#) or accounts, using the values obtained from your system administrator.
- [Enable](#) each account.
- Specify the [default account](#), as instructed by your system administrator.

You may also want to set up preferences, particularly:

- [Quick Transfer](#) numbers.
- [Contact handling](#).

## 2.1 Configuring Accounts

You must set up a SIP account in order to make and receive phone calls.

1. In the Actions menu, select Account Settings. The Account Settings window opens.
2. Select any row in the list and click Edit. The Account Properties window opens.
3. Complete all tabs as specified by your system administrator. If you do not have a system administrator, see the Bria Add-in *for Microsoft Outlook* Administration Guide
4. Complete the Voicemail tab to enable or disable voicemail and call forwarding, according to your preference.
5. On the Account Settings window, enable each account.
6. Identify one account as the default. Your system administrator may have specified which account is the default. In order to make calls correctly (that is, in order for dial plans to work), it is important that you identify the default account correctly.
7. Press Close.

## 2.2 Starting Bria Add-in and Signing In


When Outlook starts, Bria Add-in automatically starts and signs you in to all enabled accounts. You cannot exit Bria Add-in without exiting Outlook.

However, you can sign out of in order to deactivate all your enabled accounts “at one go”. Choose Actions > Sign out.

- When signed out, you cannot make or receive phone calls, but you can configure accounts, set preferences, and view call history.
- When you sign in again, enabled accounts will become useable.

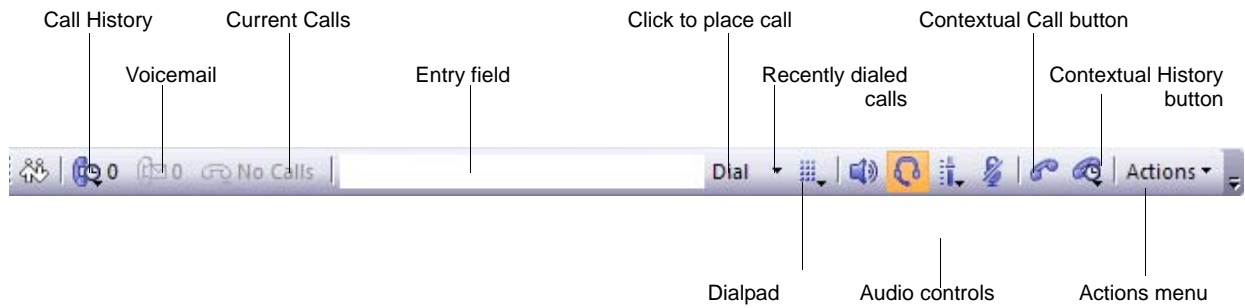
## 2.3 Updating the Bria Add-in

Updates to the Bria Add-in software are occasionally made available for download. Installing an update preserves your preferences and personal contacts.

When an update is available, the Update Available button () appears in the toolbar. You can also check for updates at any time by choosing Actions > Check For Updates.

If you close the Update wizard without downloading the update, click the Update Available button to re-open the wizard.

## 3 The Bria Add-in Toolbar



For more information:

- [Voicemail](#)
- [Call history](#)
- [Current calls](#)
- [Contextual Call button](#)
- [Contextual History button](#)
- Actions menu > [Preferences](#)
- Actions menu > Account Settings: see the *Bria Add-in for Microsoft Outlook Administration Guide*.
- Actions menu > [Signout](#)
- Actions menu > [Check for updates](#).

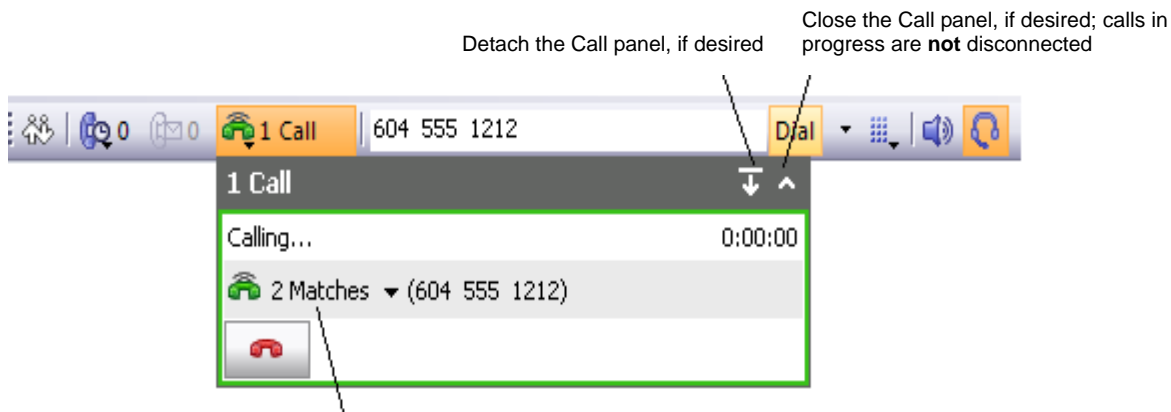
# 4 Making Phone Calls

You can make calls to softphone addresses (for example, fchan@domainA.com) and traditional (PSTN) phone Numbers. You can make a call when one or more other calls are already in progress: the currently active call will automatically be put on hold. Place the call in one of these ways:

- From the toolbar
- From the Call History panel
- From an Outlook contact
- From an Outlook e-mail
- From the Outlook calendar

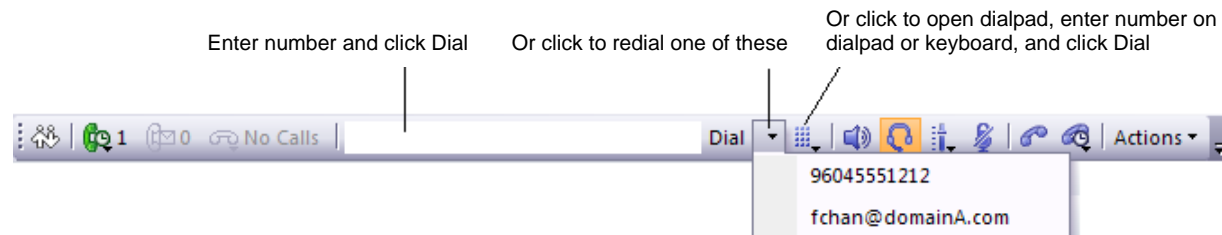
## The Call Panel

In all cases, the Call panel opens and the phone call is placed.



[Click here](#) for information on the arrow and how Bria Add-in matches names

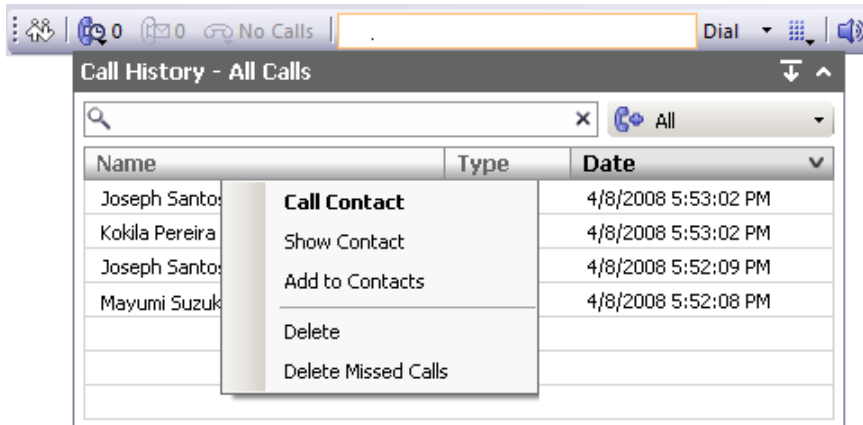
## 4.1 From the Toolbar



To convert letters to numbers open the dialpad (☰), then press the letters on the keyboard; numbers appear in the entry field. For example, when you press "a", the number "1" appears. (When the dialpad is closed, letters appear as letters, not as numbers.)

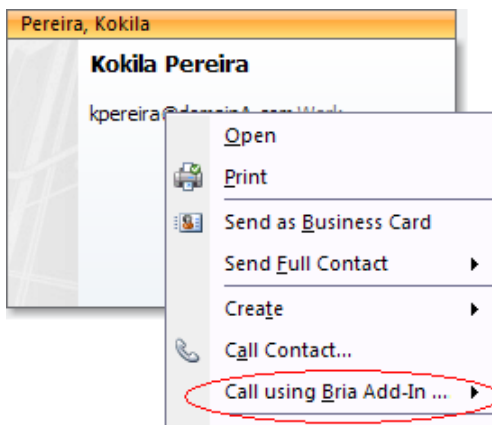
## 4.2 From Call History

Double-click an entry in your Call History.

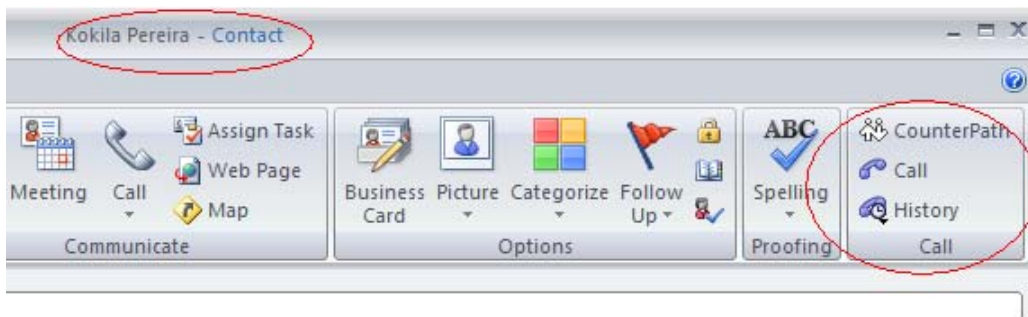


## 4.3 From an Outlook Contact

- From the Contact list, right-click the contact and select Call using Bria Add-in.



- Open a contact in Outlook, and click the Call icon in the toolbar on the Contact Details window to place a phone call to that contact.



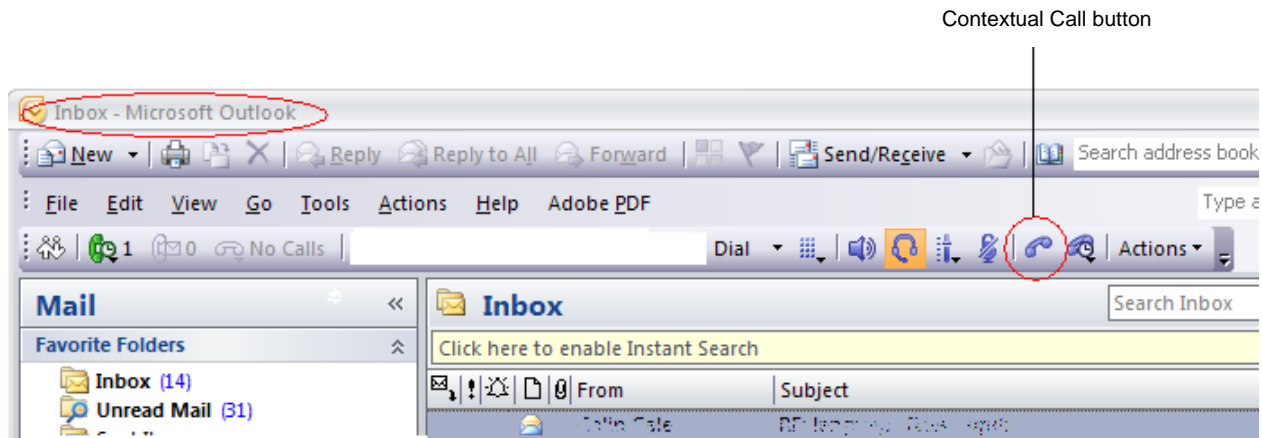
## 4.4 From an Outlook E-mail

You can make a call as follows:

- [When an e-mail is selected](#) (but not opened), using the Contextual Call button on the Bria Add-in toolbar
- [When an e-mail is open](#), using the Call button on the e-mail dialog toolbar
- [When an HTML e-mail is open](#), by right-clicking an underlined or blue phone number.

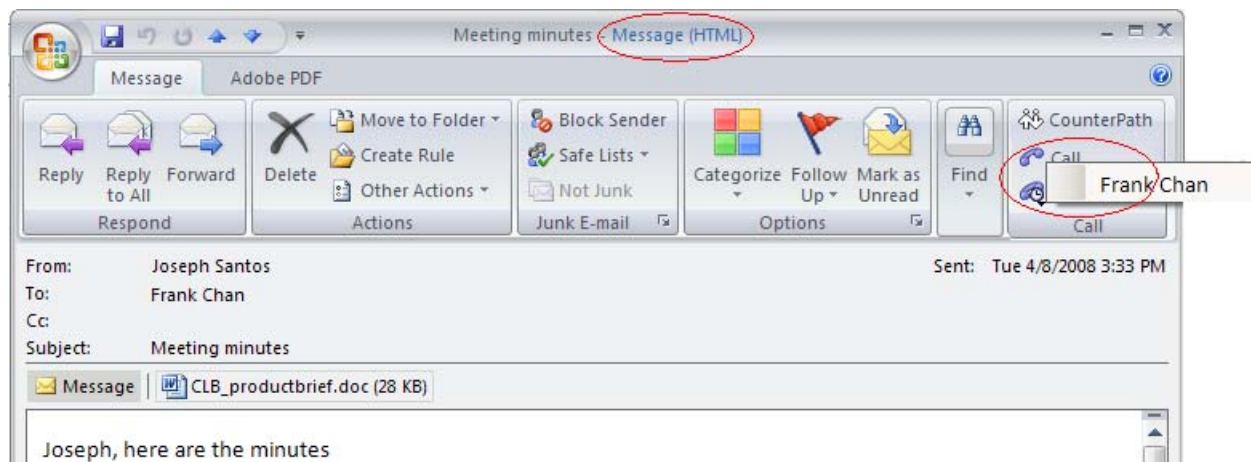
## Selected E-mail

Select an e-mail (you do not have to open it). If at least one contact in that item has a phone number, the Contextual Call button is enabled (see illustration below). Click the button to view the list of callable people from that e-mail. Select the contact to call. The call is placed immediately.



## Opened E-mail

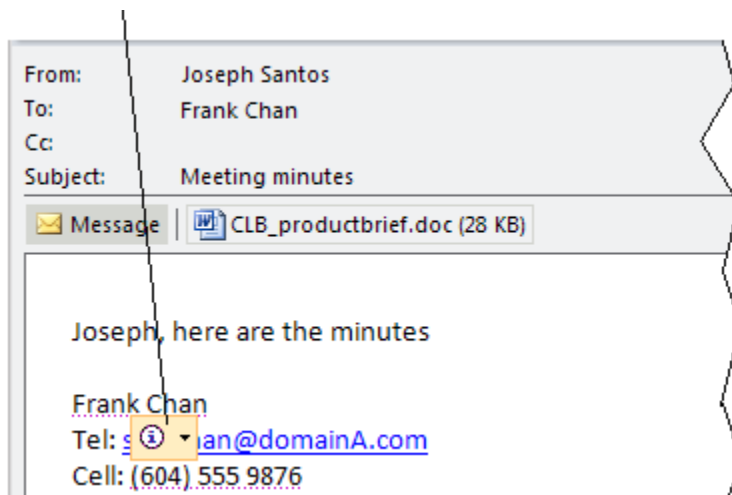
From the toolbar of an opened e-mail message, click Call and select the phone number from the list. The list includes all the phone numbers for each e-mail recipient and sender who is in your Contact list. (Note that there is no longer a Call button in the header of the e-mail.)



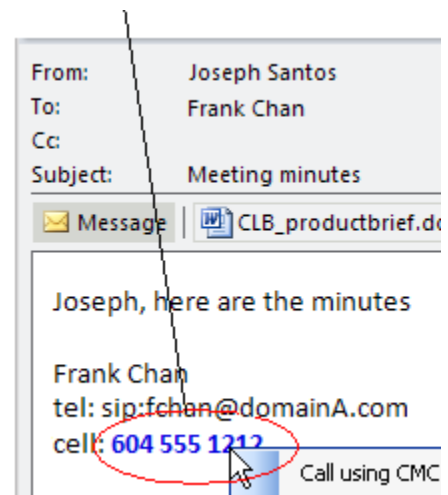
## Underlined or Blue Phone Number

From an opened HTML-format e-mail message, click any underlined phone number (if using Outlook 2007) or blue phone number (if using Outlook 2003). (Make sure you do not right-click). A menu appears. Choose Call using Bria Add-in.

In Outlook 2007, click (not right-click!) on the phone number. An info box appears. Click the down-arrow to display the choices. Choose Call using Bria Add-in.



In Outlook 2003, click (not right-click!) a blue number to display the choices. Choose Call using Bria Add-in.



### If Phone Numbers Do not Appear Underlined

To set up Outlook 2007 so that it underlines phone numbers, from the Outlook menu:

1. Choose Tools > Options. The Options dialog appears.
2. Choose the Spelling tab > Spelling and AutoCorrection button > AutoCorrect Options button.
3. Click the Smart Tags tab.
4. Make sure that the following are checked:
  - Label text with smart tags
  - Actions for number (Call Using Bria Add-in)
  - Person Name (Outlook e-mail recipients)

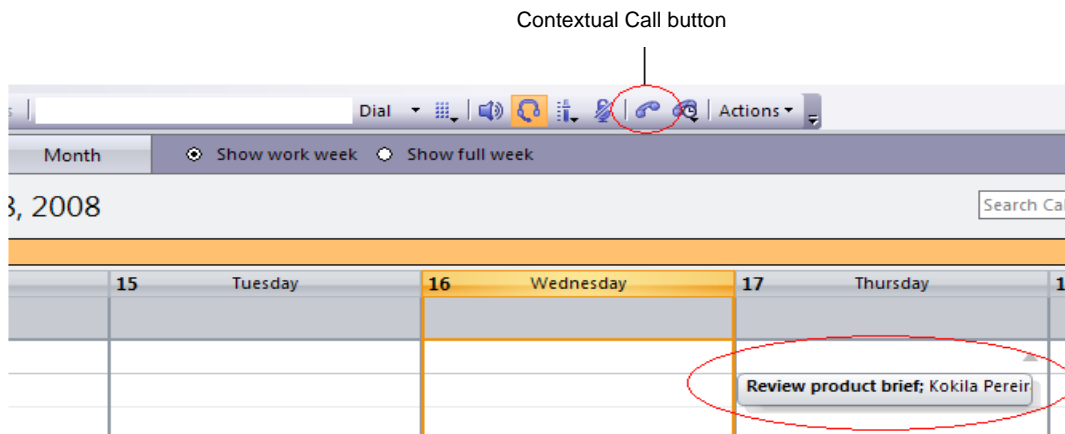
# 4.5 From the Outlook Calendar

You can make a call as follows:

- When a meeting is selected (but not opened), using the Contextual Call button on the Bria Add-in toolbar
- When a meeting is open, using the Call button on the e-mail dialog toolbar

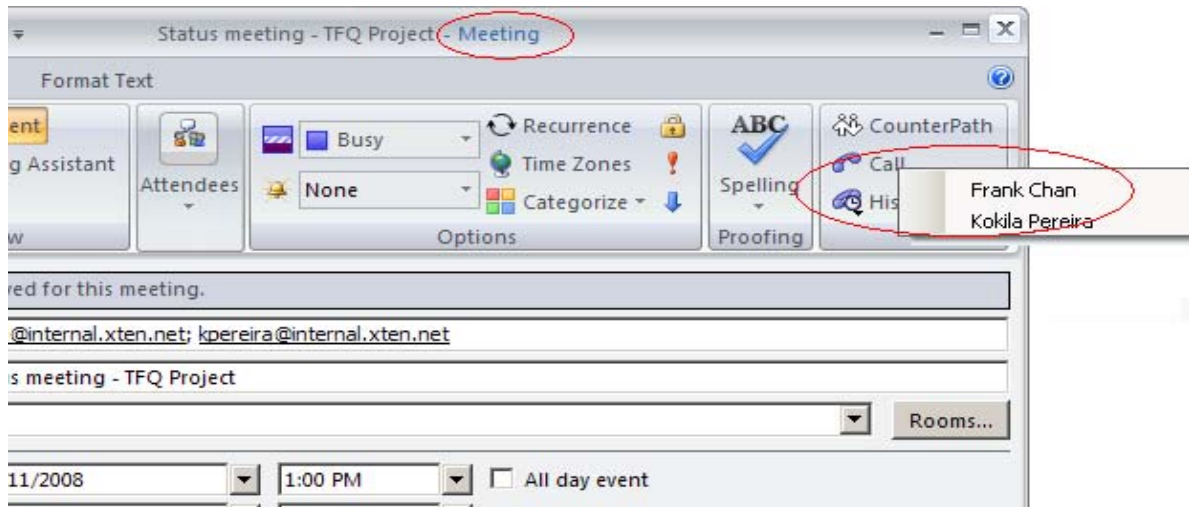
## Selected Meeting

Select a meeting (you do not have to open it). If at least one contact in that item has a phone number, the Contextual Call button is enabled (see illustration below). Click the button to view the list of callable people from that meeting. Select the contact to call. The call is placed immediately.



## Opened Meeting

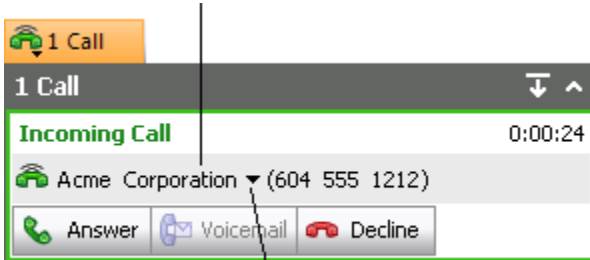
Open a meeting in Outlook, and click the Call icon to view a list of callable contacts from the meeting; select one contact to place a phone call.



# 5 Incoming Calls

When you receive a call, the call appears in the Call panel. If Outlook is open, the call appears in the Calls list.

If the caller is an Outlook contact, their name appears as underlined. Otherwise, the name appears not underlined.



[Click here](#) for information on this arrow and on how Bria Add-in matches names

## Handle the Call

Accept the call (any established call is put on hold), or send it to voicemail, or decline the call (it will be sent to [voicemail](#) if Bria Add-in is configured for voicemail).

## Missed Calls

If you miss a call, the Call History icon changes to the Missed Call icon. When you click this icon, the [Call History panel](#) opens filtered to show only missed calls.

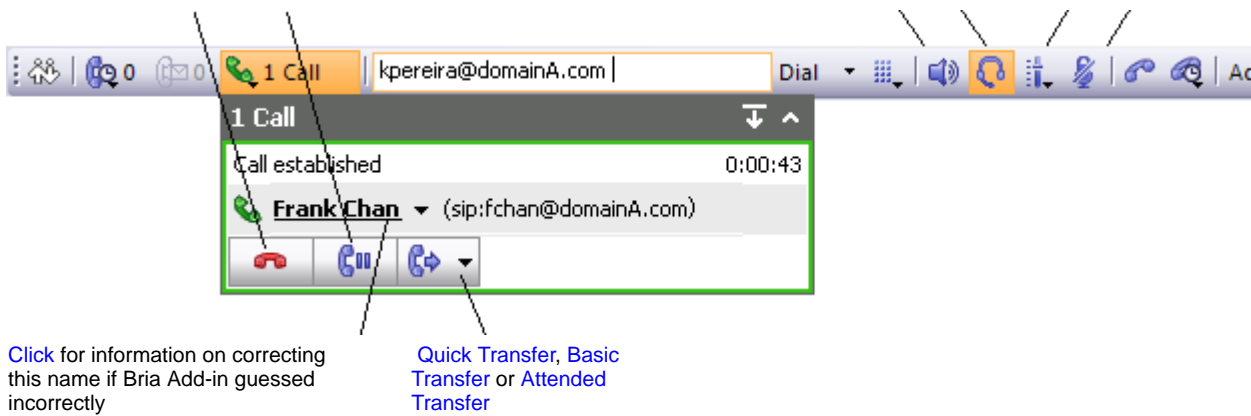
Missed Calls icon



## 5.1 Managing Calls

Hang up      Hold

Speakerphone mode      Headphone mode      Volume Mute



## Entering Touch-tones

If you make a call that connects to a voice menu system that requires that you press keys, click to open the dialpad, then enter the key on either the dialpad or the keyboard. (When the dialpad is closed, typing on the keyboard has no effect!)

This feature works both for menu choices (for example, "press 1 for ...") and for finding names in a corporate directory (for example, you can actually type the "chan" on the keyboard instead of pressing "2" for "c", "4" for "h", "2" for "a" and "6" for "n"). But the dialpad must be open!

## Hanging Up

Open the Call panel (if necessary) and click the hangup icon.

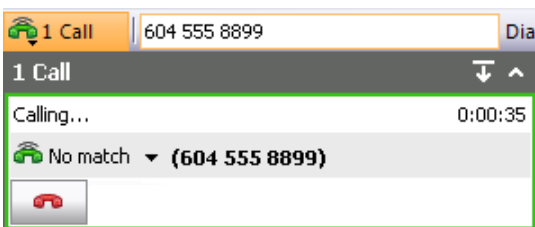
## 5.2 Correcting the Caller or Callee Name

Bria Add-in may not be able to determine which of your contacts (if any) matches the person in the incoming or outgoing call. The display appears as one of the following:

- The display name sent in the call
- "No match"
- "2 matches"

A down-arrow appears beside the name.

You can make sure the correct name appears in the Call History list: click the down arrow and select the appropriate action. For example, select the correct contact name or create a new contact. You can do this at any time, up to a few seconds after the call has ended.



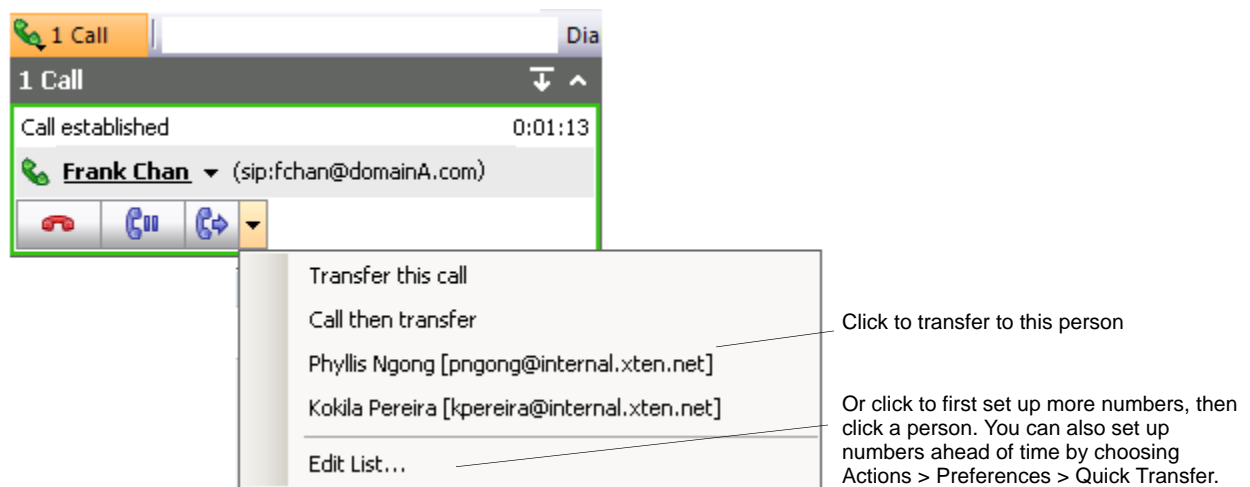
If the call panel has disappeared and the person on the call either is unknown (does not match a contact) or matches more than one contact, then the [Unknown Callee](#) dialog or the [Unknown Caller](#) dialog appears. The dialog appears to allow you to add that person as an Outlook contact.

## 5.3 Unknown Caller/Callee Dialogs

As described in [Correcting the Caller or Callee Name](#), you can change the display name that Bria Add-in guesses. If you do not do this during or just after the call, then a few seconds later, the [Unknown Callee](#) dialog or the [Unknown Caller](#) dialog appears. The dialog appears to allow you to add that person as an Outlook contact.

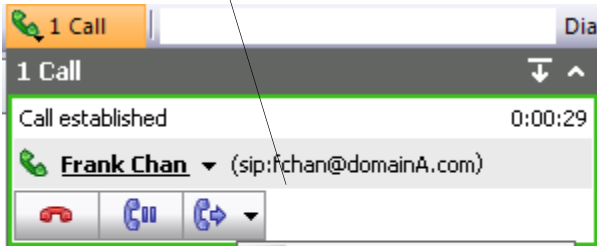
## 5.4 Quick Transfer

If you have set up quick transfer numbers, you can quickly select one of these numbers; the call will immediately be transferred to that person.

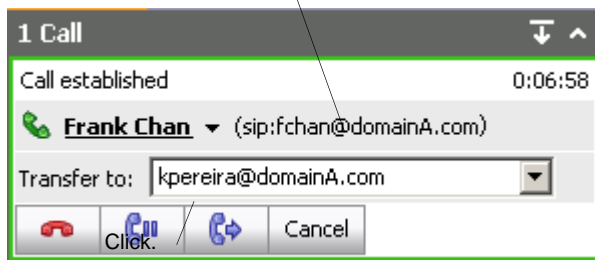


# 5.5 Basic Transfer

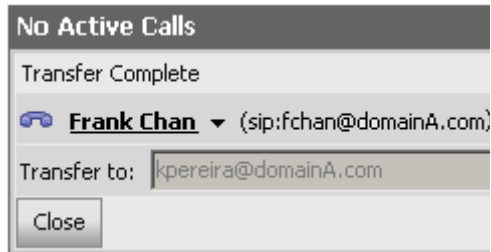
To transfer the call without first speaking to the target party, click the arrow and choose Transfer this call.



Type the number or click the arrow to select from recent numbers.

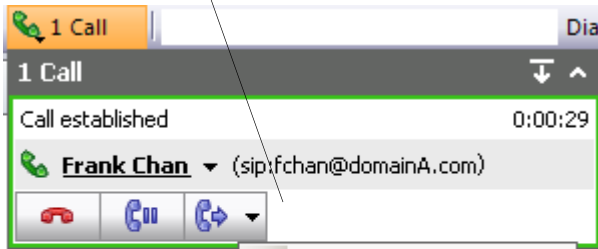


The call is disconnected at your end.

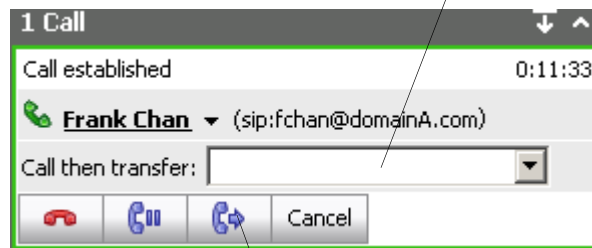


## 5.6 Attended Transfer

To transfer the call after first speaking to the target party, click the arrow and choose Call then transfer



Type the number or click the arrow to select from recent numbers.



Click. The original call is put on hold. A second call is placed to the target party.

When the other party answers and agrees to the transfer, click Transfer. Both calls are disconnected at your end.

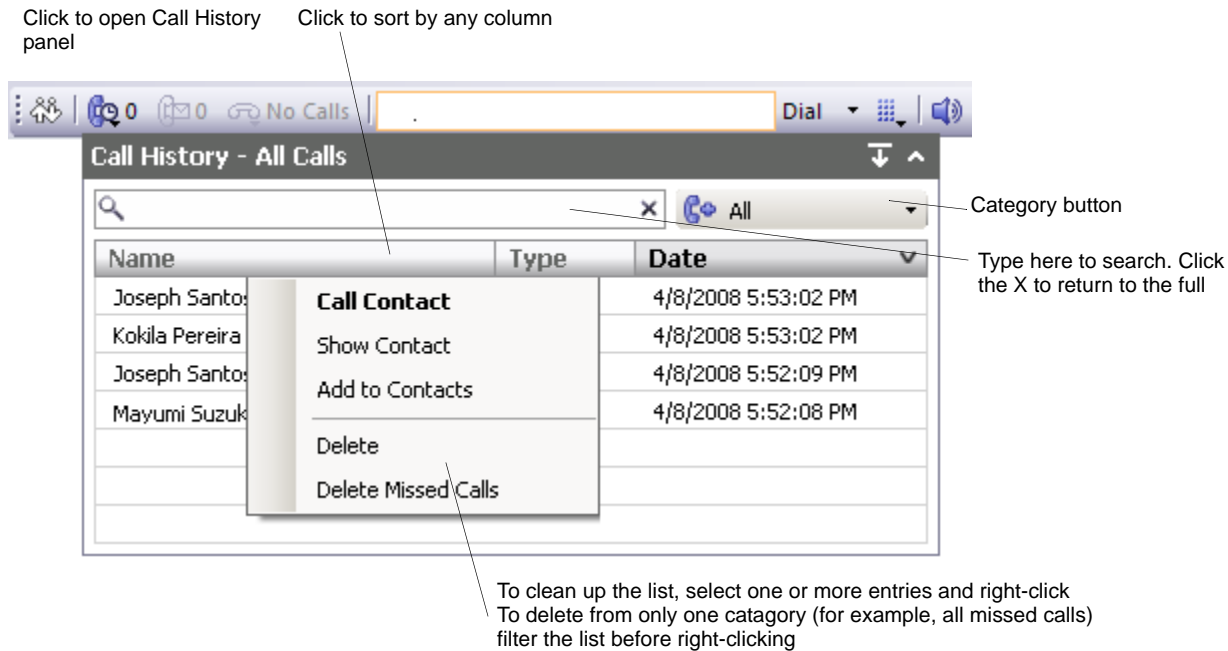


# 6 Call History

## 6.1 Viewing and Filtering the Call History List

The Call History shows your phone calls. From this panel you can:

- Make a call: Double-click an entry, or right-click and select Call Contact.
- Display contact details: Right-click and choose Show Contact
- Create a contact for the person listed: Right-click and choose Add as Contacts



### All Calls or Missed Calls?

When you open the panel, it usually shows all calls. However, if you missed a call since last opening it, it opens to show only missed calls. Use the Category button to change the category of calls being displayed.

### Call Categories

You can filter the list by:

- All Calls
- Missed Calls: Incoming calls that you declined or missed.
- Received Calls
- Dialed Calls
- Redirected Calls: Incoming calls that were forwarded or sent to voicemail.

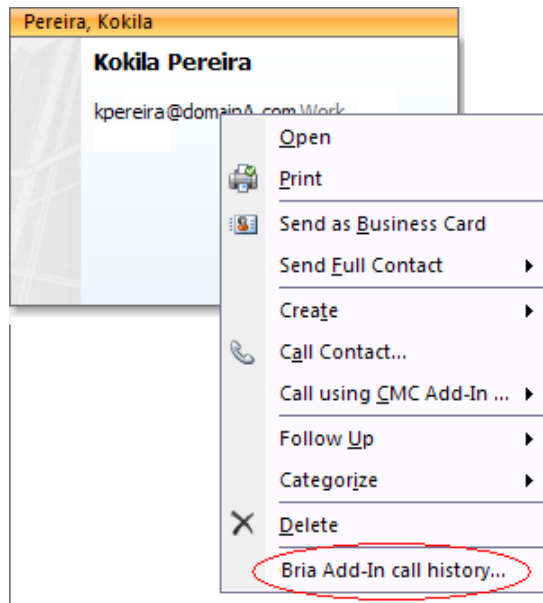
[Click here](#) for other ways to open the Call History panel.

## 6.2 Open Call History from Outlook

You can open the Call History panel [from within an Outlook contact, e-mail, or meeting](#) in the calendar:

### From a Contact

- Right-click a contact (you do not have to open it) and select Bria Add-in call history. The Call History panel opens, filtered to show only phone calls with this contact.



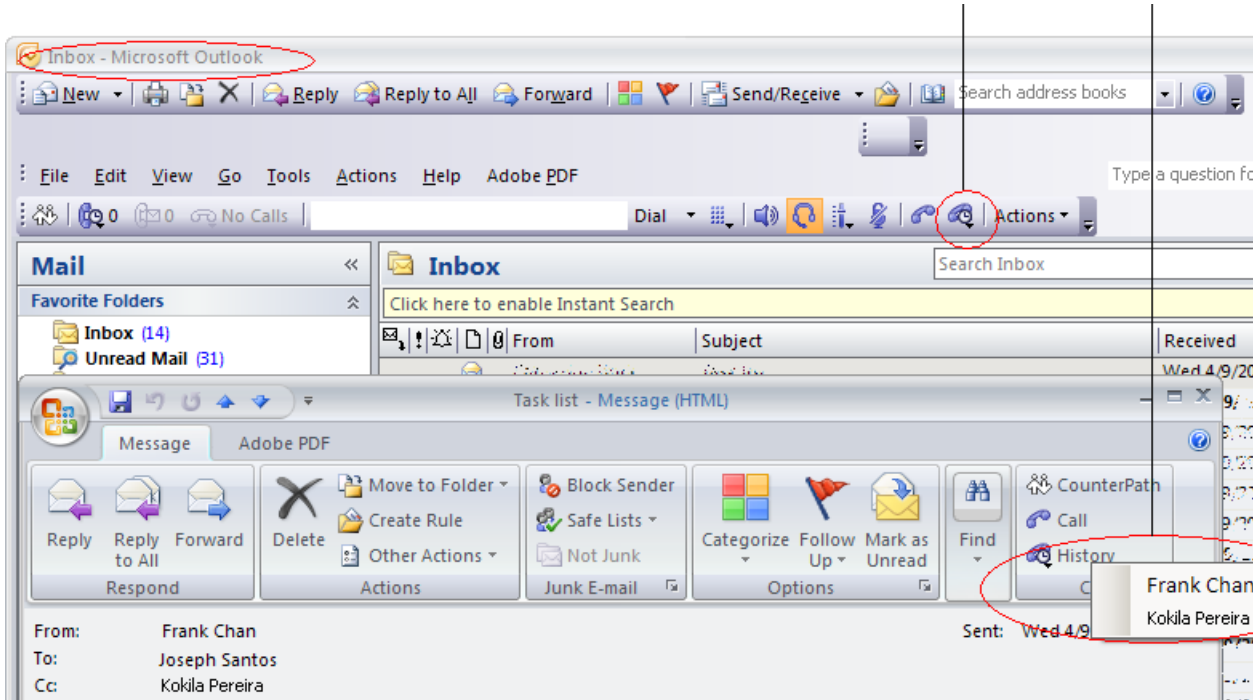
- Open a contact in Outlook, and click the History icon on the dialog toolbar to display the Call History panel filtered to show only phone calls involving this contact.

### From an E-mail or Meeting

- Select an e-mail or meeting (you do not have to open it). If at least one contact in that item has a phone number, the Contextual history button is enabled (see illustration below). Click the button to view the list of callable people from that e-mail or meeting. Select one contact. The Call History panel appears showing all the calls that involved this contact.
- Open an e-mail or meeting, and click the History icon to view a list of callable contacts from the e-mail (or meeting); select one contact to display the Call History panel filtered to show only phone calls involving this contact.

Contextual History button

History icon



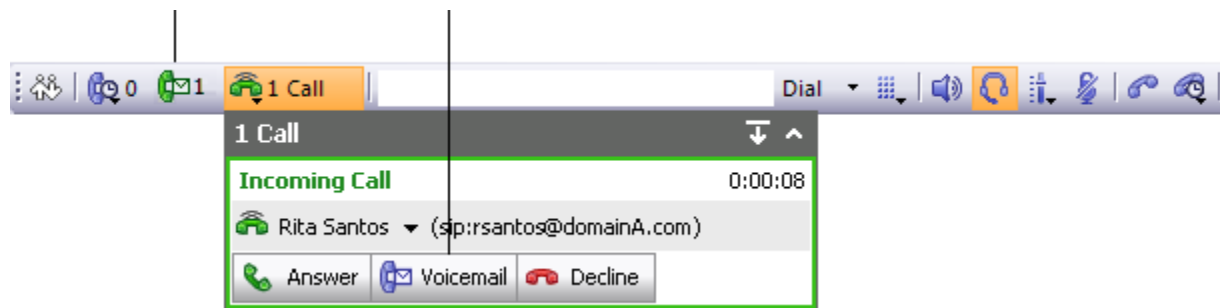
# 7 Accessing your Voicemail

In order to use voicemail functions, you must:



- Set up for voicemail. Typically, you will set up for voicemail when you [configure Bria Add-in](#); if you have not yet done so, set it up now.
- Be signed in (make sure the entry field does not have a “Signed out” message).

Message waiting indicator: you have new voicemail messages

Click to send the incoming call to voicemail



## To Access Voicemail

Click the Voicemail button (  ). When your voicemail service answers, click the Dialpad button (  ) to open the dialpad. Use this dialpad to press numerical keys required by the menu system. (You cannot use the computer keypad for this purpose.)

# 8 Working with Contacts

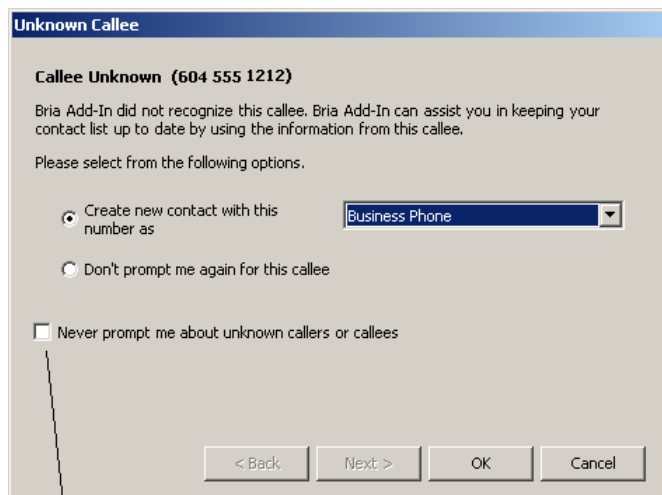
If you have a phone call that uses a phone number that is not in your contact list, then when you end the phone call, the Unknown Callee or Unknown Caller dialog appears. This dialog can lead you through steps that let you:

- Create a contact for that number.
- Make an association between the phone number and an existing contact.
- Update the contact to include the phone number.

In this way, the next time you have a phone call with this number, the contact's name appears in the Call panel.

## Unknown Callee Dialog

When you are making a phone call and the phone number you are calling does not match any contact, the Unknown Callee dialog appears (after the call has ended), to allow you to add that person as an Outlook contact.



This option also appears in preferences; choose Actions > Preferences > Contacts.

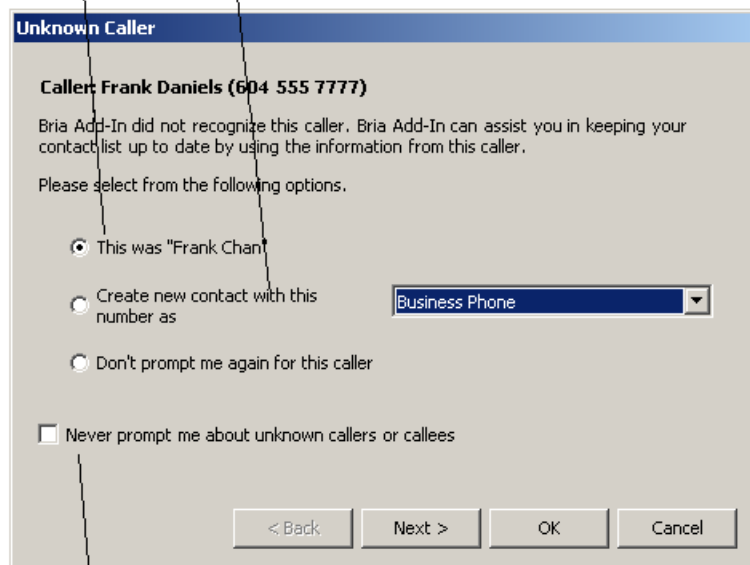
## Unknown Caller Dialog

When a phone call comes in and the caller does not match any contact, the Unknown Caller dialog appears (after the call has ended), to allow you to add the caller as an Outlook contact. You can make an association between the phone number and a contact so that Bria Add-in “learns” the contact that this number belongs to. The next time you receive a call from this person, their name will appear correctly in the Call panel.

## New Caller

The call may be from someone new. You can create a new contact using the call information.

Bria Add-in may make a guess Choose this option and click OK; the contact dialog appears.



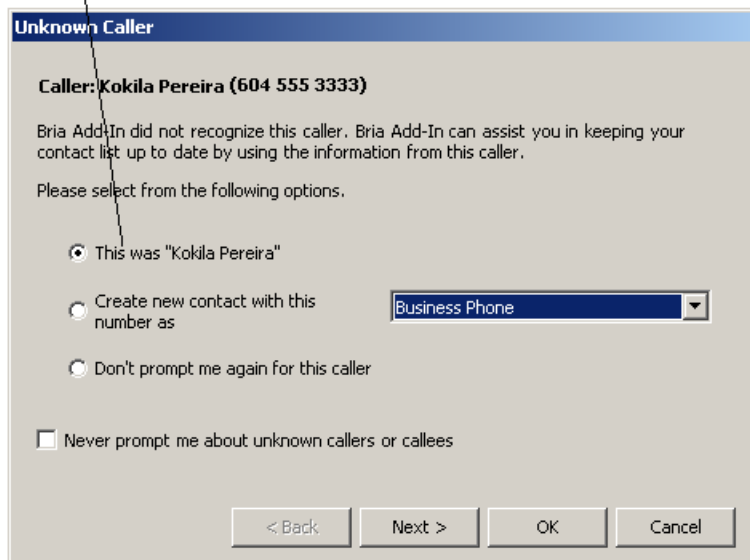
The screenshot shows a dialog box titled "Unknown Caller" with a blue header. The main text reads: "Caller: Frank Daniels (604 555 7777). Bria Add-In did not recognize this caller. Bria Add-In can assist you in keeping your contact list up to date by using the information from this caller. Please select from the following options." There are three radio button options: "This was 'Frank Daniels'" (which is selected), "Create new contact with this number as" (with a dropdown menu set to "Business Phone"), and "Don't prompt me again for this caller". At the bottom, there is a checkbox for "Never prompt me about unknown callers or callees" and four buttons: "< Back", "Next >", "OK", and "Cancel".

This option also appears in preferences; choose Actions > Preferences > Contacts.

## Contact Is Calling from a Different Number

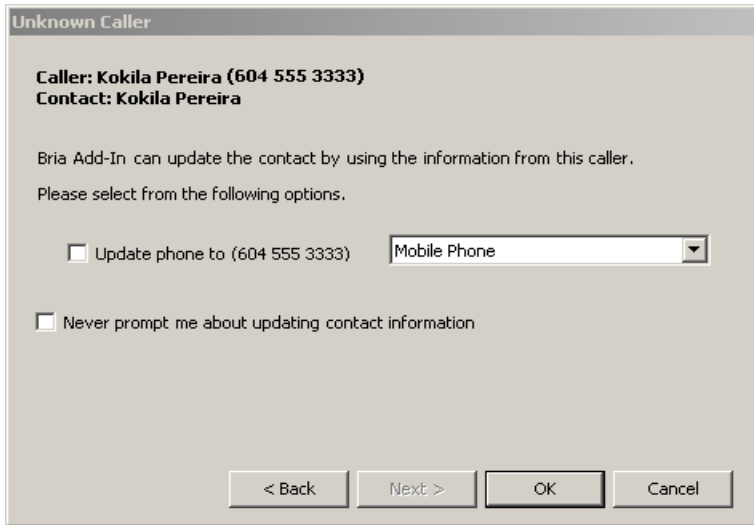
The caller may be a contact, but calling from a phone number that is not in your contact information. You can update the contact to include the new phone number.

Choose this option and click Next



The screenshot shows a dialog box titled "Unknown Caller" with a blue header. The main text reads: "Caller: Kokila Pereira (604 555 3333). Bria Add-In did not recognize this caller. Bria Add-In can assist you in keeping your contact list up to date by using the information from this caller. Please select from the following options." There are three radio button options: "This was 'Kokila Pereira'" (which is selected), "Create new contact with this number as" (with a dropdown menu set to "Business Phone"), and "Don't prompt me again for this caller". At the bottom, there is a checkbox for "Never prompt me about unknown callers or callees" and four buttons: "< Back", "Next >", "OK", and "Cancel".

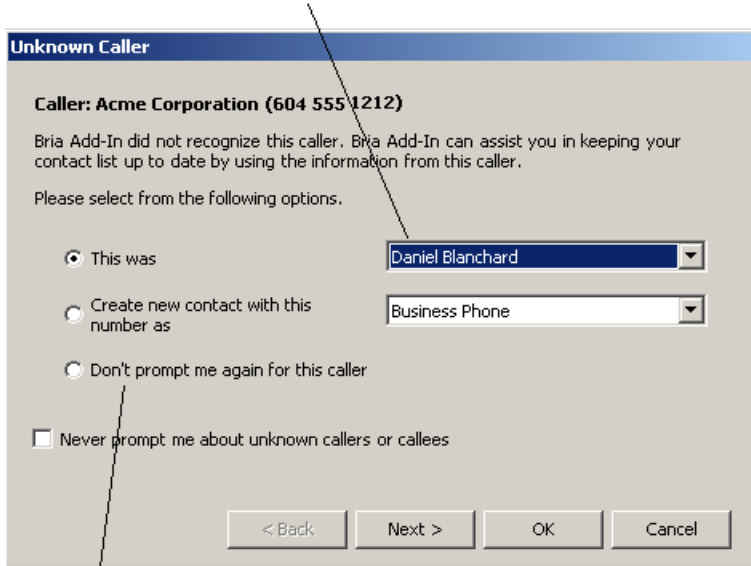
This dialog appears when you click Next:



### Caller Is behind a Switchboard

You may have several contacts that have the same switchboard phone number and different extensions. Bria Add-in cannot distinguish these different people: they all appear with the same display name, often a company name.

In this box, Bria Add-in displays all the contacts who match the phone number.



Recommendation for this scenario: Click Don't prompt me again for this caller.

The call will be logged using the display name (company name) that was provided. In this way, each time someone from this company phones you, the call information specifies the company name, instead of guessing (and often guessing incorrectly) at one of the possible contacts.

### Update Contact

If you receive a phone call from a contact but the display name is different, you are prompted to update the contact. This prompt appears once the call has ended.

**Update Contact**

**Caller: Phyllis Ngong Smith (pgnong@domainA.com)**

**Contact: Phyllis Ngong**

Bria Add-In can update the contact by using the information from this caller.

Please select from the following options.

Update name "Phyllis Ngong" to

Never prompt me about updating contact information

# 9 Preferences

The Preferences menu item lets you set up:

- Global configuration settings including device configuration, some network settings, audio codecs to control audio quality, and advanced settings.
- Preferences including Quick Transfer numbers and Contact handling options.
- Diagnostics, for troubleshooting

To reset the Network, Audio Codecs, and Advanced tabs to the factory settings, click Reset to Default.

## 9.1 Quick Transfer Tab

The Quick Transfer feature allows you to store phone numbers to transfer calls to. This saves you from having to retype numbers that you frequently transfer calls to.

During a call, you can choose Quick Transfer to display this list of quick transfer numbers and transfer to one of these numbers.

To remove a Quick Transfer number, clear the phone number portion of the entry.

## 9.2 Device Tab

Bria Add-in automatically detects audio devices at startup and selects the most appropriate device for each purpose. For example, if your computer has both a sound card that supports speakers and microphone and a headset, Bria Add-in will select the headset for Headset Mode and the sound card for Speakerphone Mode and the Phone Ring Device.

The Devices tab allows you to override Bria Add-in's selections.

If you change the audio devices connected to your computer, Bria Add-in will make new selections for you. Check the Devices tab to make sure the new selections suit you.

- **Headset Mode:** Change these fields only if you want to override the devices that Bria Add-in automatically selected.

Select the headset in both the Speaker device field and Microphone device field.

The headset is the device that is usually used for audio out (the sound you hear) and audio in (recording your voice). The only situation in which the headset is not used is when the Speaker Phone button on the dialpad is pressed.

Therefore, unless you will always be using Bria Add-in in speakerphone mode, you must make a selection here.

- **Speakerphone Mode**

Change this field only if you want to override the devices that Bria Add-in automatically selected.

Select the device that you want to use for audio out (the sound you hear) when the Speaker Phone button is pressed. Make sure you select a speaker device (not the headset).

The device used for speaker and that used for the microphone do not have to be the same.

- Ring Device

Change this field only if you want to override the devices that Bria Add-in automatically selected.

The device where you want to hear the phone ringing: the headset, the speakerphone, or none.

## 9.3 Network Tab

- Use automatic bandwidth detection

Select this check box to allow Bria Add-in to determine the bandwidth based on the speed of your network connection. If your computer's IP address changes, Bria Add-in will automatically detect the new speed. Alternatively, clear this check box and select the type of network connection your computer uses.

- Preserve bandwidth during silence periods

When this check box is selected, Bria Add-in stops transmitting audio whenever you stop talking. This is useful if you are using a slow (dial-up or ISDN) connection, as it preserves bandwidth, but it may adversely affect call quality. This setting is off by default.

## 9.4 Audio Codec Tab

You can enable or disable any codec. With only one codec enabled, all calls made will use that codec. With more than one codec enabled, Bria Add-in automatically chooses the best codec based on the other party's capability, the available bandwidth, and network conditions.

You cannot change the properties of any codecs.

## About Codecs

Audio codecs describe the format by which audio streams are compressed for transmission over networks. Codecs are either narrowband or wideband:

- Narrowband codecs work with low bandwidth such as dialup Internet connections. These codecs have a sampling rate of 8 KHz.
- Wideband codecs work with high bandwidths and result in better audio quality. However, they do not work with PSTN. These codecs have a sampling rate of 16 KHz.

## Supported Codecs

Following is a list of codecs that are supported in Bria Add-in. Your application will include at least one of these codecs, depending on your application's brand and licensing. To make PSTN calls, at least one of G.711 aLaw, G.711 uLaw, or G.729 must be included and enabled.

### Narrowband Codecs

Bria Add-in supports the following narrowband codecs: DV14, EVRC, G.711 aLaw, G.711 uLaw, G722, G723.1, G.729, GSM, iLBC, Speex, Speex FEC.

## Wideband Codecs

Bria Add-in supports the following wideband codecs: AMR Wideband (G.722.2), BroadVoice-32, BroadVoice-32 FEC, DV14 Wideband, L16 PCM Wideband, Speex Wideband, Speex Wideband FEC.

## 9.5 Advanced Tab

- Reduce echoes from speakers (AEC): Acoustic Echo Cancellation (AEC) improves sound quality by reducing the echo from speakers. This feature is on by default. Clear the check box to turn off echo reduction.

## 9.6 Contacts Tab

You can enable or disable the prompts that appear when a call is made to a person that Bria Add-in does not recognize as a contact. These prompts let you create or update contacts based on the call information.

[Click here](#) for more information.

# 10 Troubleshooting

## Warning from Outlook

- **Problem:** You receive the following warning from Outlook: A program is trying to access e-mail addresses you have stored in Outlook. Do you want to allow this?
- **Cause:** The Exchange server's security policy is blocking Bria Add-in.
- **Solution:** The administrator responsible for maintaining the Exchange server must add a copy of Bria Add-in's PAO.dll file to the Exchange server as a trusted add-in. PAO.dll is located in Bria Add-in installation directory.

## Sign In Error: Service Unavailable

- **Problem:** Bria Add-in is offline and the status area says “Sign In Error: Service Unavailable”.
- **Causes:** The VoIP services for your enabled accounts are unavailable; or your enabled accounts contain errors in the account settings.
- **Solution:** If the message appeared immediately after you configured an account, then the problem is probably caused by a configuration error. Edit the newly configured account and verify that the settings match the account information provided by your system administrator.  
If you have not recently changed any account settings, then the problem is likely service availability. Contact your system administrator for information.

## Using a Trial License

If your license allows you a free trial of Bria Add-in software, the license will expire and “Click to enter a new license key” will appear in the status area. You cannot make or receive calls when the license has expired. You must obtain a new license.

# 11 Index to Panels and Dialogs

Click on the link to go to the page that describes the panel or dialog:

- [The toolbar](#)
- [Call panel](#)
- [Call History panel](#)
- [Unknown Caller dialog](#)
- [Unknown Callee dialog](#)
- [Update Contact dialog](#)
- Account Settings dialogs. See the administration guide, *Bria Add-in for Microsoft Outlook Administration Guide*.
- [Preferences dialogs](#)

