![Smart Choice logo](SMARTCHOICE — You Manage the Business. We Connect It.)

Bria - Contacts Instruction Manual

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Contacts

Viewing Contacts

Bria stores your contacts for you. These contacts may be contacts you have added using Bria, they can be contacts that are synched with your Outlook or G-Suite account, or they can be a special contact group of your team members. G-Suite contacts have on them as an identifier.

Contacts are organized in groups in **List of contacts** (Windows) or **Contacts** (Mac) — referred to as **Contacts**. You will see a pre-defined group of your team members. Each contact is shown with presence information (if available) and icons for single-click calling and messaging.

Presence and messaging are not available for G-Suite contacts.

If the **Contacts** or **Favorites** tabs are not showing, click **Show Contacts** or **Show Favorites** on the **View** menu.

Using Contacts and Favorites

In **Contacts** or **Favorites**, you can open the **Contact Info** flyout, or open the **Contact Profile** (Windows) or the **Contact Editor** (Mac) for more contact details.

Important Note: You cannot open the Contact Profile (Windows) or the Contact Editor (Mac) for G-Suite contacts and team members. Contact information is displayed on the contact flyout. You can open the contact flyout from the Contacts, Favorites, or History tab.

Using the Contact Info Flyout

1. Click on a contact in **Contacts** or **Favorites.** A **Contact Info** flyout appears with contact information.
2. Click **Profile** if you want to see more information on a local contact.
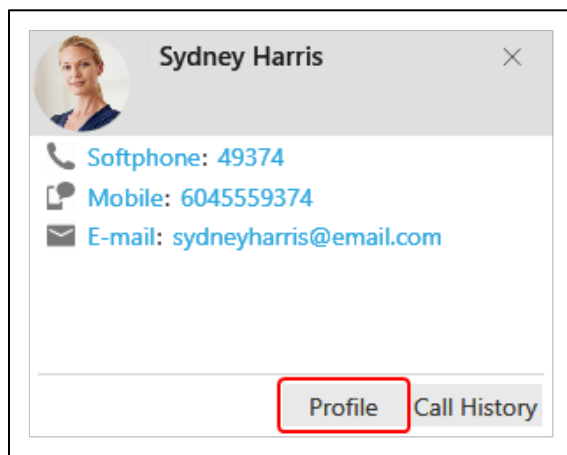
Bria displays the **Contact Profile** (Windows) or the **Contact Editor** (Mac.)

Using the Shortcut Menu

1. Right-click (Windows) or CTRL + click (Mac) on a contact in **Contacts** or **Favorites** and select **Edit Profile** (Windows) **or View/Edit Profile (Mac).**

Bria displays the **Contact Profile.**

Using History

In History, you can open to Contact Info flyout to view the contact information. Open the **Contact Profile** (Windows) or the **Contact Editor** (Mac) for more contact details.

Using the Contact Info Flyout

1. Click on a **History** group to expand the group entry.

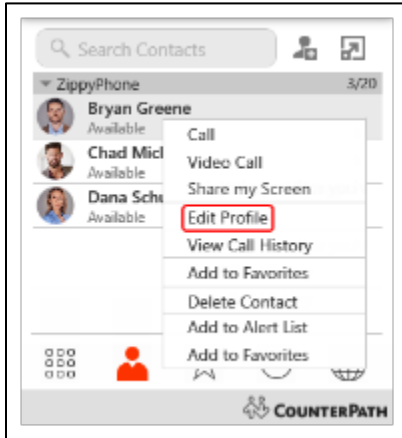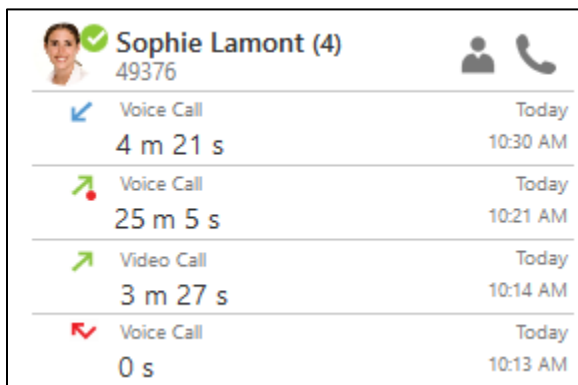2. Click on **Contact Info**. A **Contact Info** flyout appears with contact information.

3. Click **Profile** if you want to see more information for a local contact
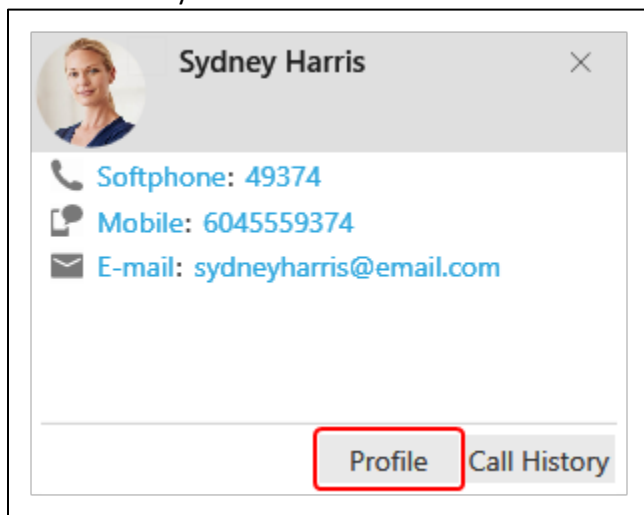
Bria displays the **Contact Profile** (Windows) or the **Contact Editor** (Mac).

Using the Shortcut Menu

1. Right-click (Windows) or CTRL + click (Mac) on a call group or the heading of an expanded call group.
2. Click **Edit Contact** (Windows) or **Edit Contact Profile** (Mac).
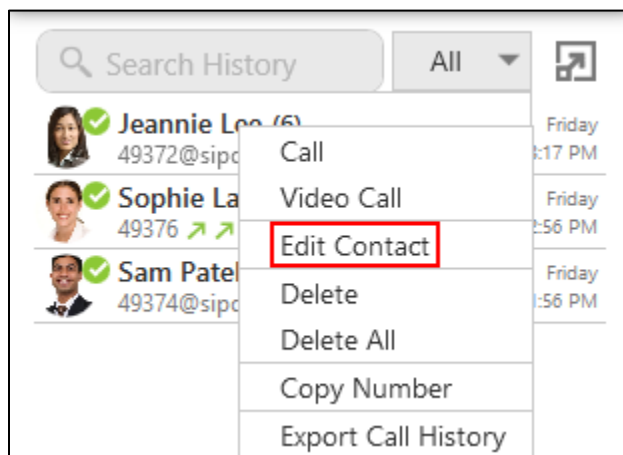
Bria displays the **Contact Profile** (Windows) or the **Contact Editor** (Mac).

Using the Contact Info Flyout

1. With the **All** or **Chat Room** filter applied, click on the chat room in the conversation list.
2. Click **Members** in the chat room header. The number indicates the number of members in the room.
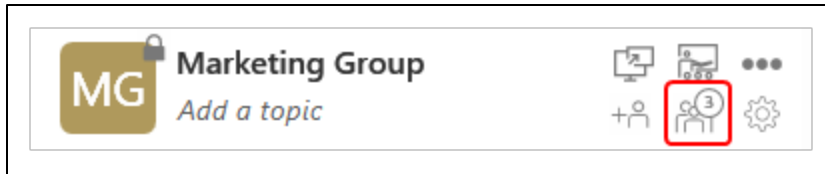
The members list opens in the chat room panel.

3. Click on the contact's avatar. The **Contact Info** flyout opens.

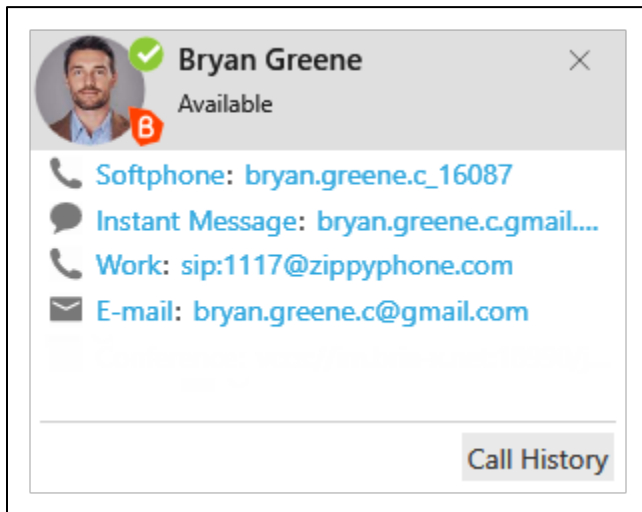Bria displays the **Contact Profile** (Windows) or the **Contact Editor** (Mac).

Adding and Exporting Contacts

For each contact you communicate with, you can save their information as an entry in the contacts list. These contacts are added individually or by importing multiple contacts from another source. You can also export your contacts to a .csv file, a vCard file, or a .pst file.

When you first install Bria, and at any time in the future, you may want to populate the contacts from an external source such as a file of contacts in your Outlook address book.

You can populate the contacts in these ways:

Adding an Individual Contact

You can add local contacts individually in the Contacts panel, using the Contacts menu and in the History panel. If your G-Suite account is added to Bria, Bria displays two types of contact – local contacts and G-Suite contacts. G-Suite contacts have on them as an identifier. G-Suite contacts are added automatically when you add your G-Suite account. G-Suite contacts are read-only.

Adding a Local Contact in the Contacts Panel

Use Add a new contact or the shortcut menu to add an individual contact from the Contacts panel.

To Add a Contact Using the Add a New Contact Icon:

1. On the Contacts panel, click Add a new contact.
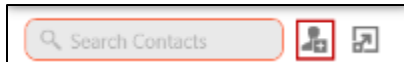
    The Contact Profile (Windows) or the Contact Editor (Mac) window appears.

2. Use the Group drop-down arrow to select the group or groups that you want a contact to belong to.
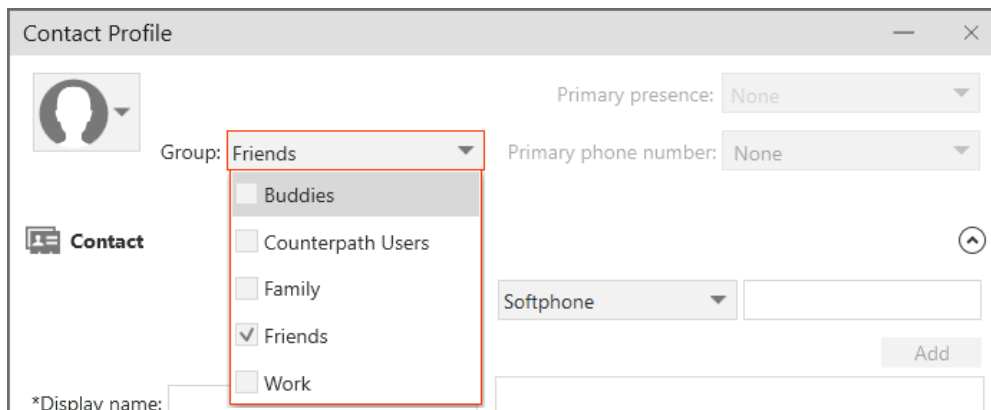
3. Use the drop down list to select the type of information you want to add, type the information, and click Add (Windows) or the Add number icon (Mac).

4. Complete the Display name (required on Windows).

5. Complete any other fields you want to include with the contact.

6. Click OK.

The contact is added to Bria.

To add a contact using the shortcut menu:

1. Right-click (Windows) or CTRL+click (Mac) on a group and click Add Contact to Group. The Contact Profile (Windows) or the Contact Editor (Mac) window opens.

2. Use the drop down list to select the type of information you want to add, type the information, and click Add (Windows) or the Add number icon (Mac).

3. Complete the Display name (required on Windows).

4. Complete any other fields you want to include with the contact.
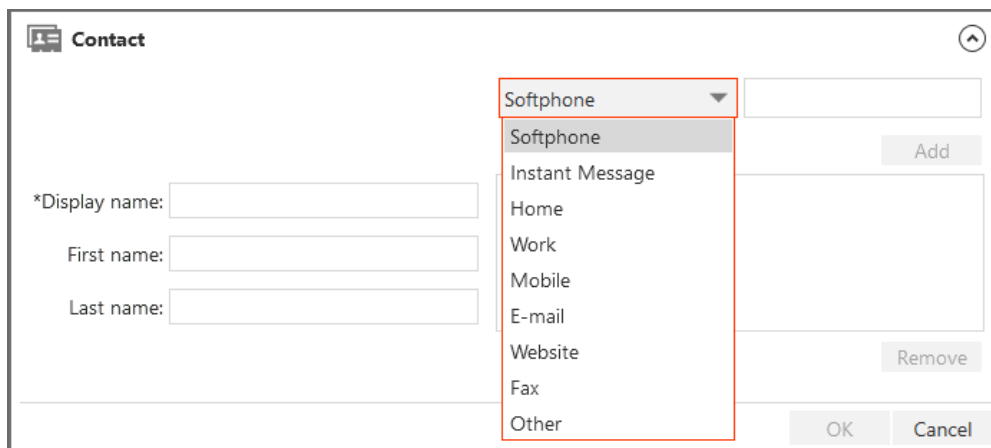
5. Click OK.

The contact is added to Bria.

Adding a Contact Using the Contacts Menu

You can add contacts to Bria using the Contacts menu on the menu bar.

1. Click Add Contact on the Contacts menu.

2. Use the Group drop-down arrow to select the group or groups that you want a contact to belong to.

3. Complete the Display name (required on Windows).

4. Complete any other fields you want to include with the contact.

5. Click OK.

The contact is added to Bria.

Adding a Contact in the History Panel

Add an unknown number to a new or existing contact from History.

To add a contact using Add this person to your contact list:

1. Click on a History group with the caller ID Unknown. The History group expands.
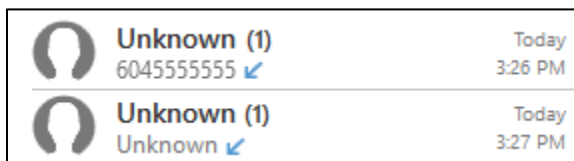
2. Click Add this person to your contact list.

The Contact Profile (Windows) or the Contact Editor (Mac) opens.

3. Use the Group drop-down arrow to select the group or groups that you want a contact to belong to.

4. Use the drop down list to select the type of information you want to add, type the information, and click Add (Windows) or the Add number icon (Mac).
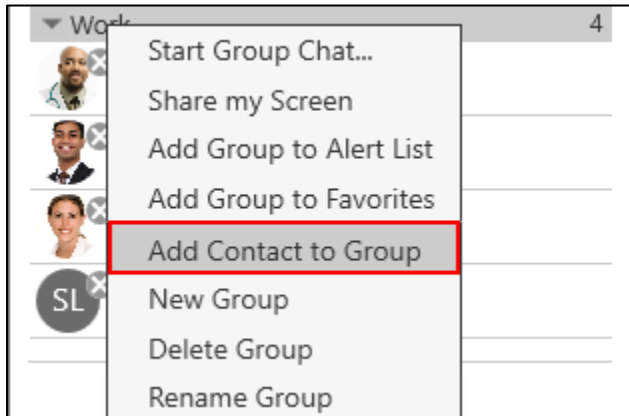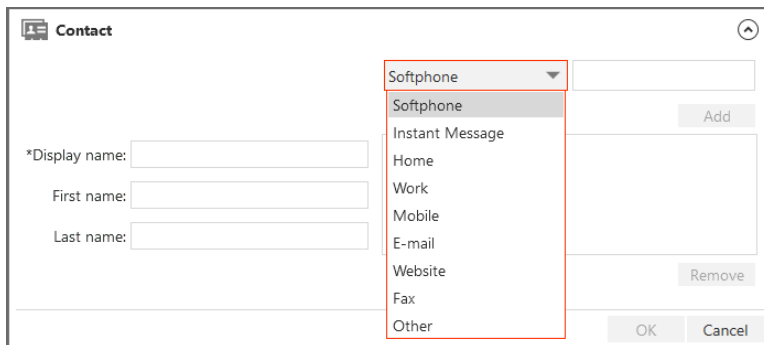

5. Complete the Display name (required on Windows) and any other fields you want to include with the contact.

6. Click OK.

The contact is added to Bria.

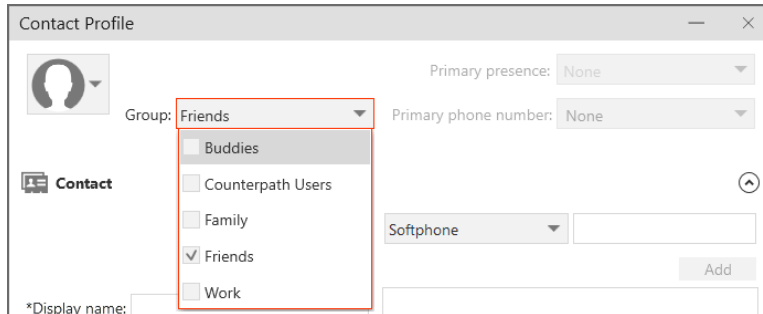## To Add a Contact Using the Shortcut Menu

Right-click (Windows) or `CTRL`+click (Mac) on the **History** entry with the caller ID **Unknown** and click **Create Contacts.**

The **Contact Profile** (Windows) or the **Contact Editor** (Mac) opens.

Use the **Group** drop-down arrow to select the group or groups that you want a contact to belong to.

Use the drop down list to select the type of information you want to add, type the information, and click **Add** (Windows) or the **Add number** icon (Mac).

Complete the **Display name**(required on Windows) and any other fields you want to include with the contact.

Click **OK**.

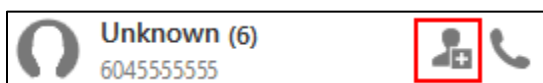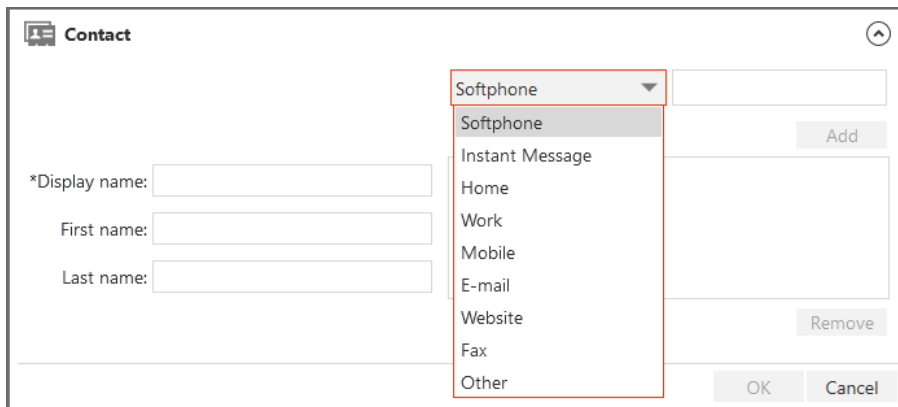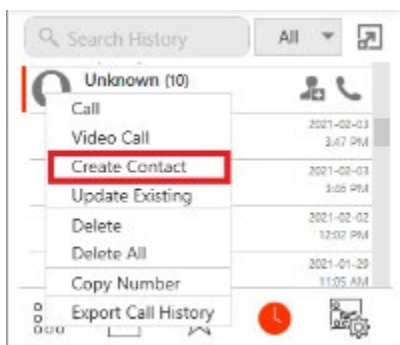The contact is added to Bria.

Adding a New Number to an Existing Contact in the History Panel
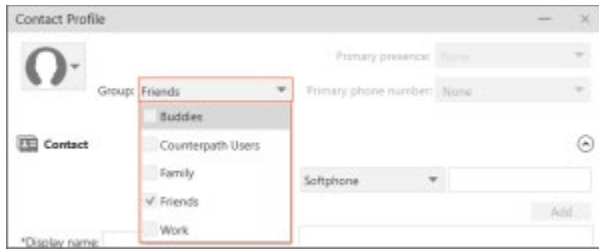
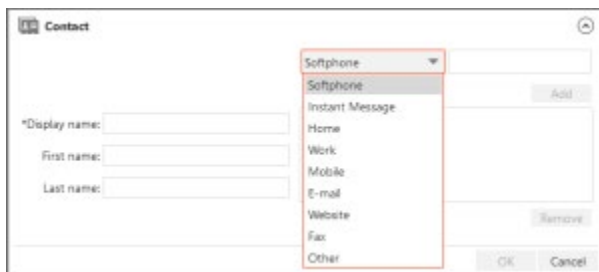1. Right-click (Windows) or `CTRL`+click (Mac) on the **History** entry with the caller ID **Unknown** and click **Update Existing.**
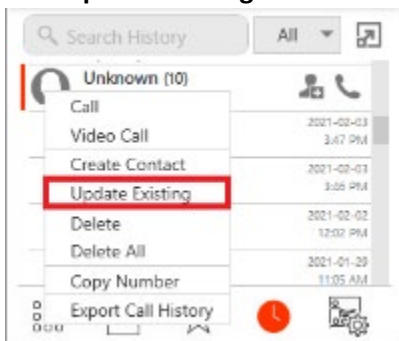
   The **Find Contacts** dialog opens.
2. Choose a contact you want to add this number to.
3. The **Contact Profile** (Windows) or the **Contact Editor** (Mac) opens.

4. Edit any of the fields that need to be changed.
5. **Click OK.**

The number is added to the contact in Bria.

Fields in Contact Profile

The **Contact Profile** is divided into **Contact Summary, Contact**. If you have merged multiple contacts together, you may see more than one **Contact** section.

Some fields may be read-only depending on how the contact was added to Bria.

Important Note: There is no **Contact Profile** for G-Suite contacts. Contact information can only be viewed in the contact flyout.

Importing Contacts

You can populate Bria's contacts by importing an external file or files. Your system administrator may have placed a file on the server for you to import. You can also import your own file or files. New contacts will be added to existing contacts.

You can import a contact list from:

- **.csv file**: A comma-separated value file. Use this method to import from a Microsoft® Excel® file.

- **vCard file** (*.vcf file): A vCard is an electronic business card that is often attached to an e-mail.

- **.pst file**: (Windows) A Microsoft Exchange® contact list (*.pst file).

- **Mac Address Book**: (Mac) A Mac contact list.

Important Note: If you add your **Outlook account** or **Mac Address Book account**, you do not need to import your Windows or Mac contact lists.

To Prepare a .CSV File in Excel for Import

1. Remove any introductory text or headings from the to of the file. You can keep the text at the end of the file as it will be ignored during import.

2. Insert a blank row as the first row. In the next row, insert the heading that Bria will use to interpret the meaning of each column. The columns can be in any order. The key heading are:

   o **sip-address**: Bria recognizes a value in this column as a softphone address and considers the address as one that can be phoned and one that can be using for IM and presence (if SIP is being used for IM and presence).

   o **xmpp-address:** Bria recognizes a value in this column as a Jabber (XMPP) address and will map this field to the Instant Message field for the contact.

- o **display-name, given-name**, and **surname**

- o **business_number**

- o **presence_subscription:** Complete this field in one of these ways:

If you only want to share presence information with some of your contacts, fill in this column in the file. Enter "true" for contacts whose online presence you want to see. Leave this column blank or enter "false" for others. During the import, you will be able to choose to share presence with only the contacts that have "true". Bria will subscribe to the presence for "true" contacts assuming that the user has a SIP account (if SIP is being used for IM and presence).

If you want to share presence with all or with none of your contacts, ignore this heading. During the import you will be able to choose whether to share will all or none of your contacts.
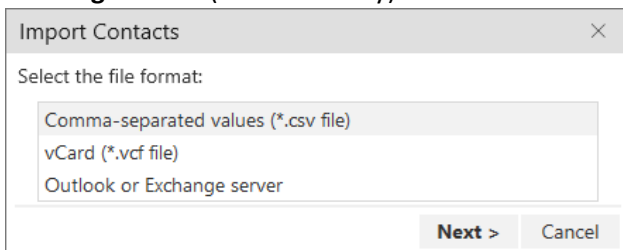
For a complete list of headings, see Contact list headings.

3. Save the file as "*.csv".

The file is now ready for import.

To Import Contacts from a .PST, .CSV, or VCARD File

1. On the **Contacts** menu, click **Import Contacts.**
2. Select the file type — **Comma-separated values (*.csv file), vCard (*.vcf file),** or **Outlook** or **Exchange server** (Windows only) — and click **Next**.
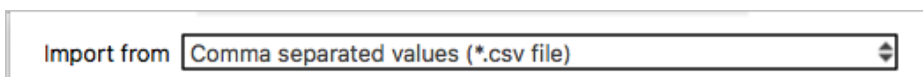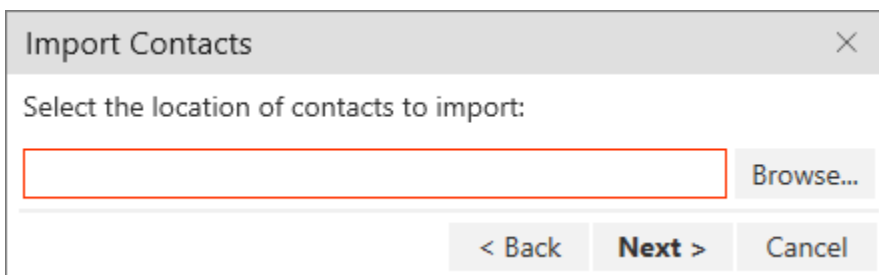

3. Enter the location of the file and click **Next**.
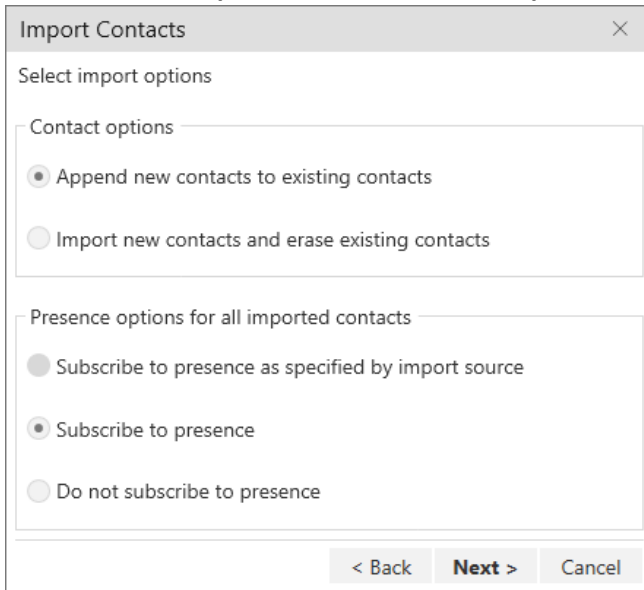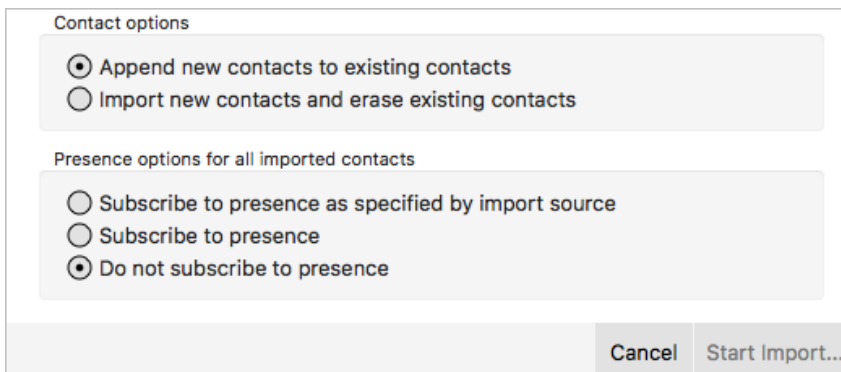
4. Set the **Contact Options** and the **Presence options for all imported contacts** and click **Next**.

Bria imports the contacts that are in the file.

To Import Mac Address Book Contacts

1. On the **Contacts menu**, select **Import Contacts.**
2. Use the drop-down list to select **Mac address book** in the **Import from** field and leave **Location** blank.
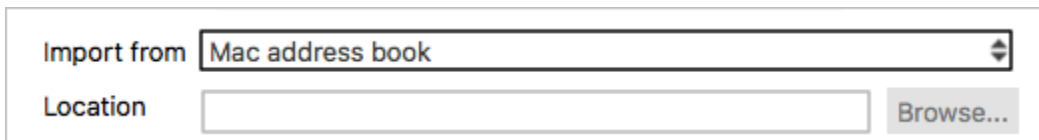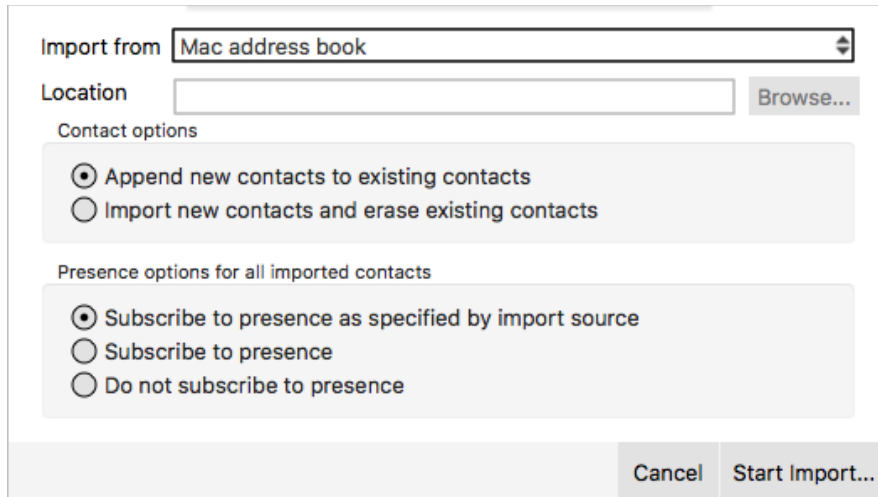

3. Set the **Contact Options** and the **Presence options** for all imported contacts and click **Start import.**

4. Select the individual contacts you want to import or select the check box for **Select all contacts.**
5. Click **Import**.

Bria imports the contacts that are in the file.

Exporting Contacts

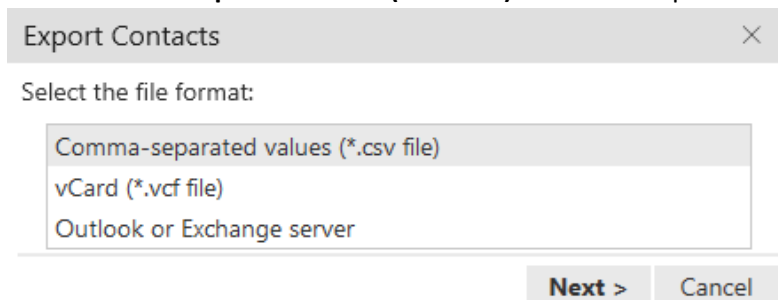You can export Bria and G-Suite contacts to a file on your computer.
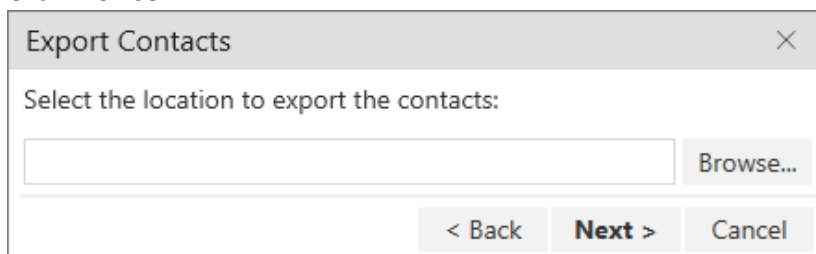
Exporting Contacts in Windows

In Windows, Bria contacts can be exported as a .csv file, a vCard file, or a .pst file.

To export a .csv file:

1. On the **Contacts** menu, click **Export Contacts.**
2. Select **Comma-separated value (*.csv file)** from the drop-down list and click **Next**.

3. Click **Browse**.

The Windows save dialog open.

4. Use the file explorer to find the location you want to save the file, give the file a name and click **Save**.
5. Click **Next** on **Export Contacts.**

A new .csv file is created in the location you chose in the **Export Contacts** wizard.

PST: For a PST export, the existing PST file is updated to include the entries from Bria. If Microsoft® Outlook® is open, the entries immediately appear in the Outlook contacts.

All information in Bria is exported to Microsoft Outlook. Only information that can be displayed in Outlook appears in the Outlook Contacts window. Typically, this means that all softphone addresses are exported (and stored in custom fields) but not displayed in Outlook.
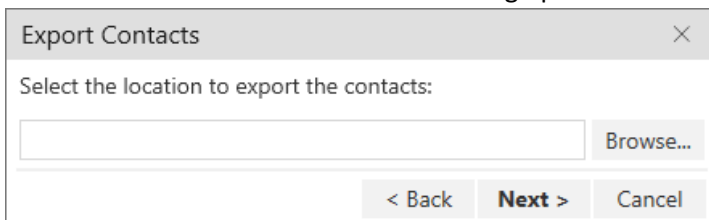
vCard and CSV: A new file of the specified type is created in the location you chose in the **Export Contacts wizard**.

To export a .vCard file:

1. On the **Contacts** menu, click **Export Contacts.**
2. Select **vCard (*.vcf file)** from the drop-down list and click **Next**.
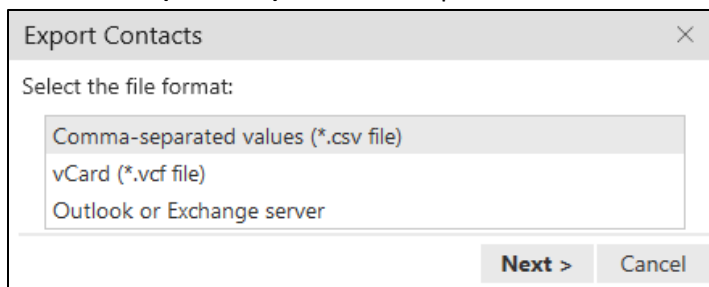
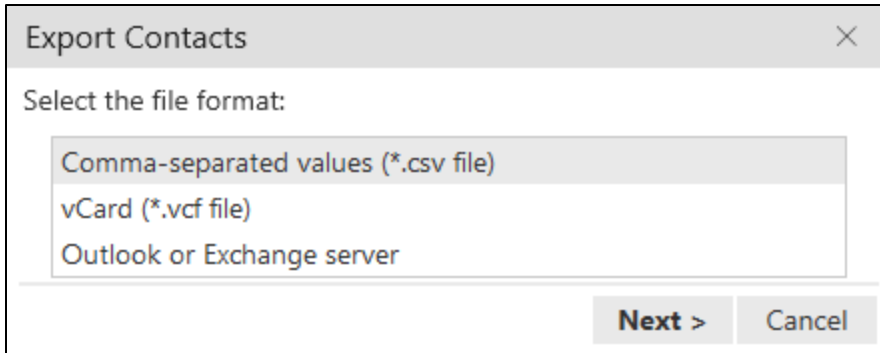3. Click **Browse**. The **Browse for Folder** dialog opens.

4. Use **Browse for Folder** to navigate to the location you want to save the file and click **OK**.
5. Click **Next** on **Export Contacts.**

A new vCard file is created in the location you chose in the **Export Contacts** wizard.
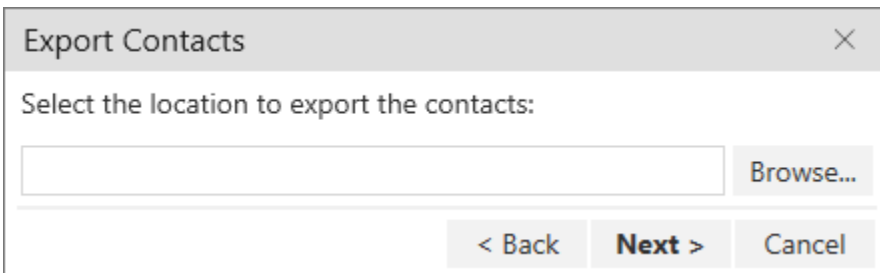
To export a .pst file:

1. On the **Contacts** menu, click **Export Contacts.**
2. Select **Outlook** or **Exchange server** from the drop-down list and click **Next**.
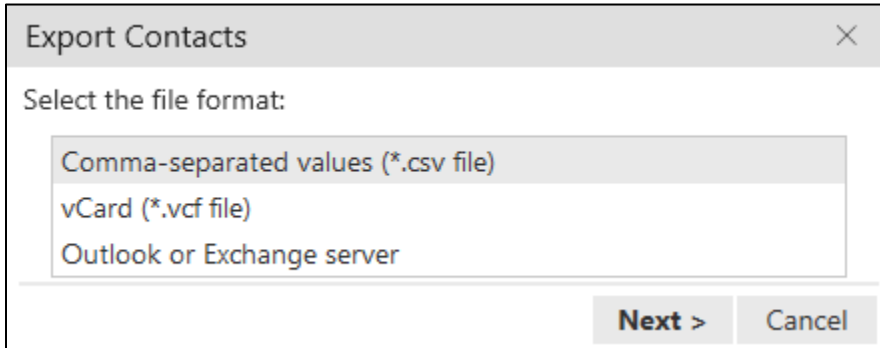
3. Click **Browse**.

The Windows save dialog open.

4. Use the file explorer to find the location you want to save the file, give the file a name and click **Save**.

5. Use the drop down list to select a field to use in the .pst file for the softphone address and the IM address.
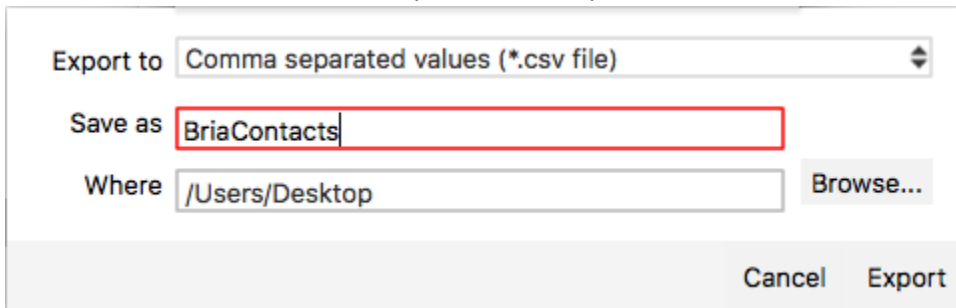

6. Click **Next**.

The existing PST file is updated to include the entries from Bria. If Microsoft® Outlook® is open, the entries immediately appear in the Outlook contacts. Typically, this means that all softphone addresses are exported (and stored in custom fields) but not displayed in Outlook.

Exporting Contacts in Mac

In Mac, Bria contacts can be exported as a .csv file or a vCard file.

To export a .csv file:

1. On the **Contacts** menu, click **Export Contacts.**
2. Select **Comma separated values (*.csv file)** from the drop-down list.
3. Type a name for the file in **Save as.**
4. Use **Browse** to select the location you want to export the file to.
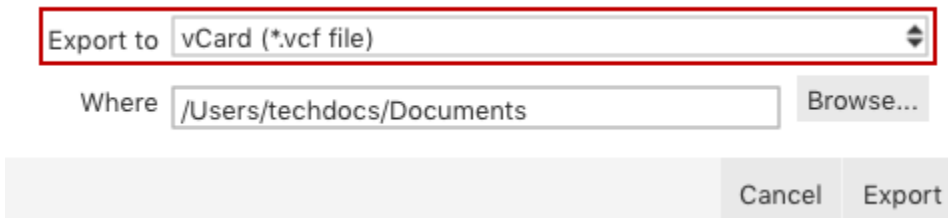

5. Click **Export**.
   A new file of the specified type is created in the location you chose in the **Export Contacts** wizard

To export a vCard file:

1. On the **Contacts** menu, click **Export Contacts.**
2. Select **vCard (*.vcf file)** from the drop-down list.
3. Use **Browse** to select the location you want to export the file to.

4. Click **Export**.

A new file of the specified type is created in the location you chose in the **Export Contacts** wizard.

Editing a Contact

You can update contact information, merge and split local contacts, change the contact groups, and delete contacts.

You cannot edit, merge and split, change contact groups, or delete G-Suite contacts.

Updating Contact Information

You can open the **Contact Profile** (Windows) or the **Contact Editor** (Mac) from **Contacts**, **Favorites**, **History**, and **Messages**. Once in the **Contact Profile** (Windows) or the **Contact Editor** (Mac), you can edit the contact.

Using Contacts and Favorites

In **Contacts** and **Favorites**, you can use the **Contact Info** flyout or the shortcut menu to open the **Contact Profile** (Windows) or the **Contact Editor** (Mac) so you can edit local contacts.

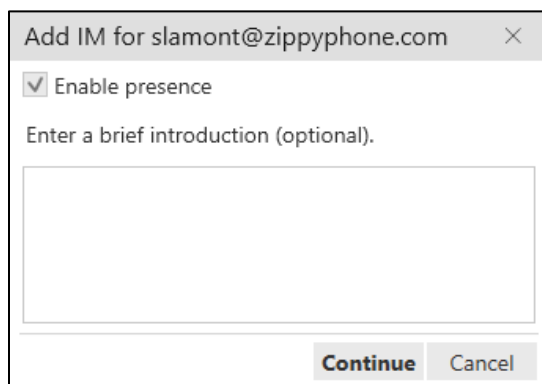## To Edit a Contact Using the Contact Info Flyout

1. Click on a local contact and click **Profile** in the **Contact Info** flyout.
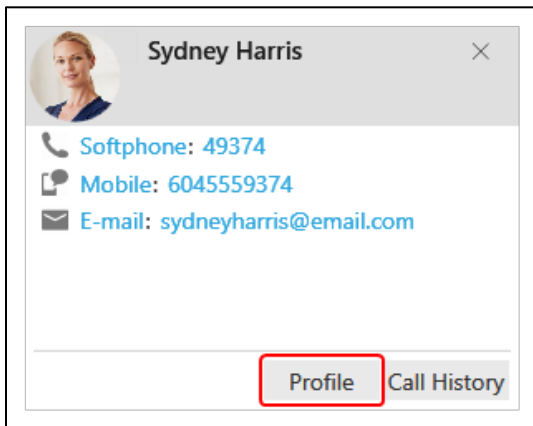
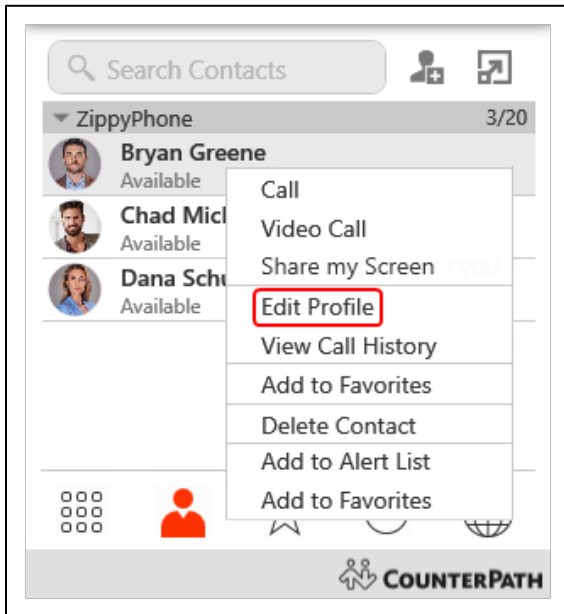   The **Contact Profile** (Windows) or the **Contact Editor** (Mac) window opens.

2. Edit any of the fields that need to be changed.

3. Click **OK.**

The contact is updated in Bria.
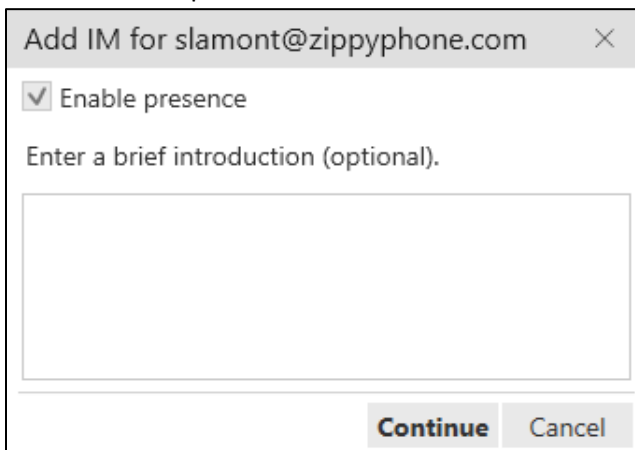
To Edit a Contact Using the Shortcut Menu

1. Right-click (Windows) or CTRL+click (Mac) on a contact and select **Edit Profile** (Windows) or **View/Edit Profile** (Mac).

The **Contact Profile** (Windows) or the **Contact Editor** (Mac) window opens.

2. Edit any of the fields that need to be changed.
3. Click **OK**.
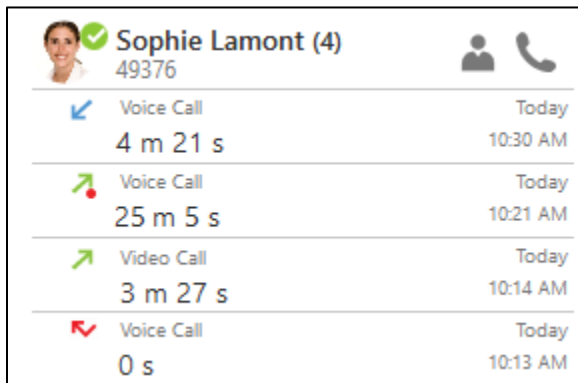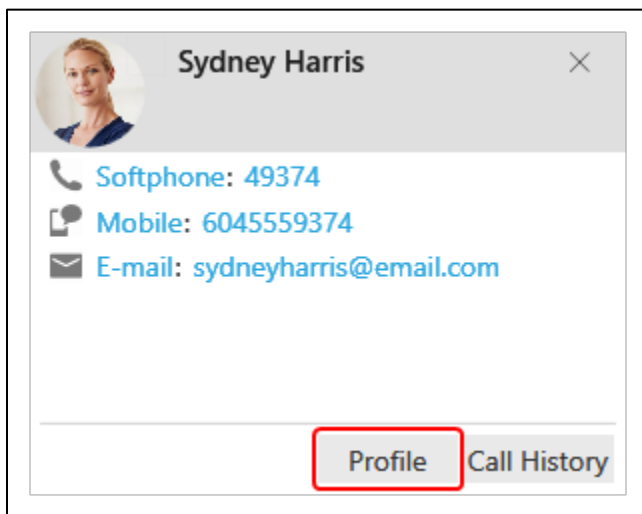
The contact is updated in Bria.

Using History

In History, you can use the **Contact Info** flyout or the shortcut menu to open the **Contact Profile** (Windows) or the **Contact Editor** (Mac) so you can edit local contacts.

To Edit a Contact Using the Contact Info Flyout
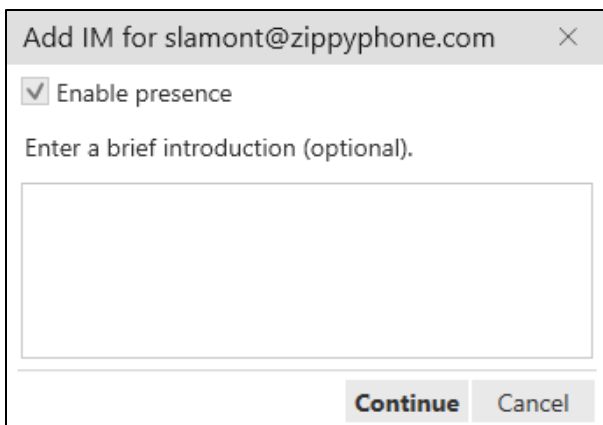
1. Click on a **History** group to expand the group entry.

2. Click on ![icon] **Contact Info**. A **Contact Info** flyout appears with contact information.

3. Click **Profile**.

The **Contact Profile** (Windows) or the **Contact Editor** (Mac) window opens.

4. Edit any of the fields that need to be changed.

5. Click **OK**.

The contact is updated in Bria.

To Edit a Contact Using the Shortcut Menu

1. Right-click (Windows) or `CTRL`+click (Mac) on a call group or the heading of an expanded call group.
2. Click **Edit Contact.**

   The **Contact Profile** (Windows) or the **Contact Editor** (Mac) window opens.
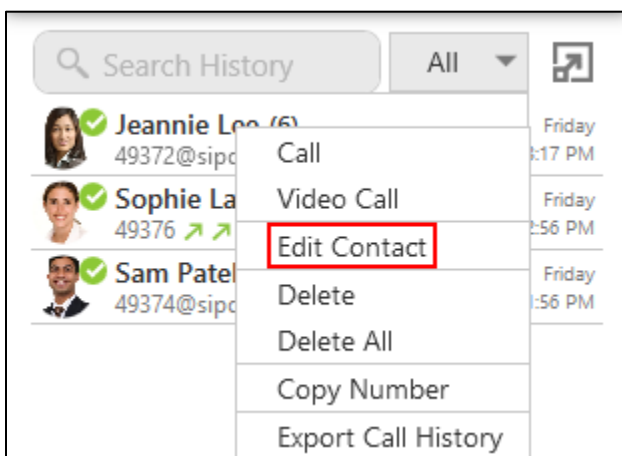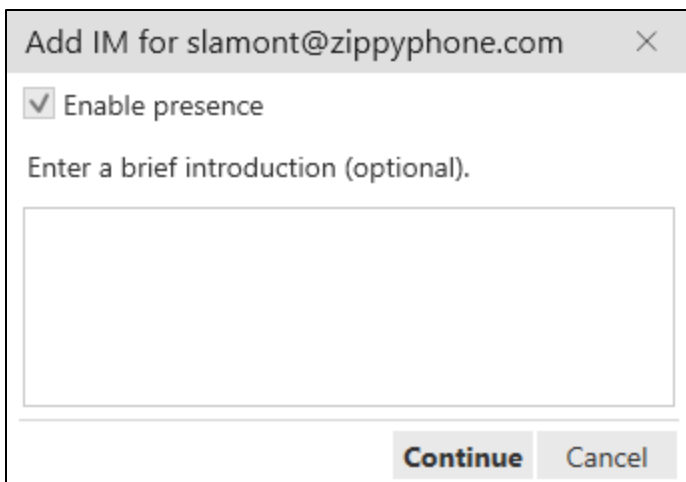3. Edit any of the fields that need to be changed.
4. Click **OK**.
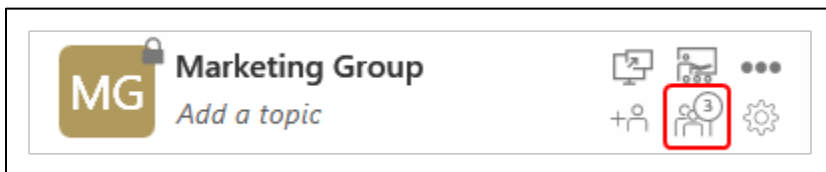

   The contact is updated in Bria.

Using the Contact Info Flyout

1. With the **All** or **Chat Room** filter applied, click on the chat room in the conversation list.
2. Click **Members** in the chat room header. The number indicates the number of members in the room.

The members list opens in the chat room panel.
3. Click on the contact's avatar.
The **Contact Info** flyout opens.
4. Click **Profile** if you want to see more information.
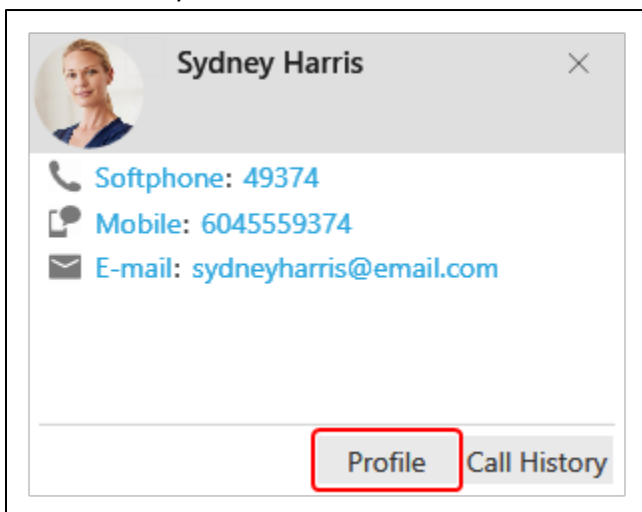
5. Bria displays the **Contact Profile** (Windows) or the **Contact Editor** (Mac).
6. Edit any of the fields that need to be changed.

7. Click **OK**.

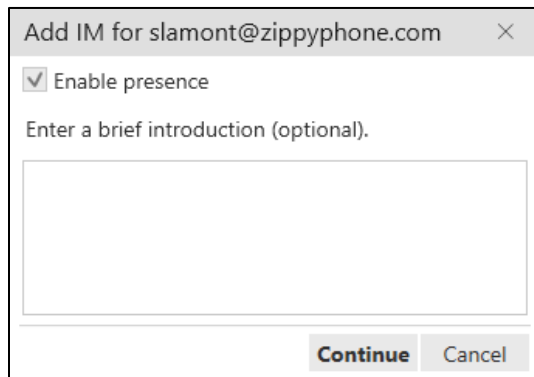The contact is updated in Bria.

Merging Contacts

If you have two entries for local contacts that should be one contact, you can merge the contacts together. G-Suite contacts cannot be merged.

To Merge Contacts Using the Shortcut Menu

1. Use `Shift`+Click, `Ctrl`+Click (Windows), `Command`+Click (Mac) or a combination to select one or more contacts you want to merge.
2. Right-click (Windows) or `Shift`+`Ctrl`+Click (Mac) and select **Merge Contacts.**
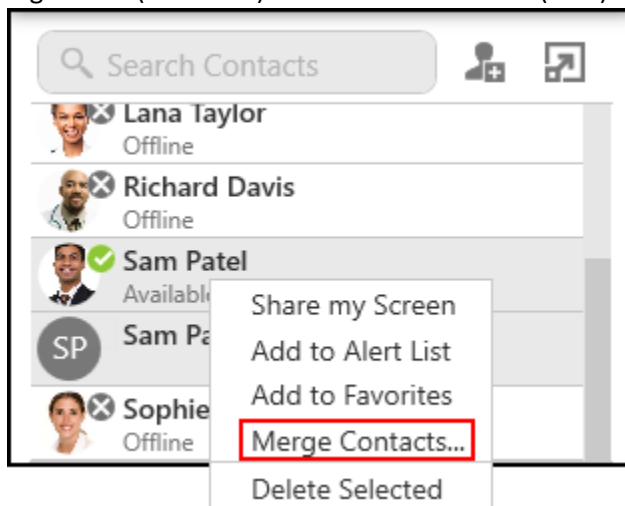
   The **Contact Profile** (Windows) or the Contact Editor (Mac) window opens.
3. Edit any of the fields that need to be changed.
4. Click **OK**.
   The contacts are merged into a single contact.

To Merge Contacts Using Drag and Drop

1. Use `Shift`+Click, `Ctrl`+Click (Windows), `Command`+Click (Mac) or a combination to select all but one of the contacts you want to merge.
2. Drag the selected contacts onto the last contact you want to merge. The **Merge Contacts** dialog opens.

   The **Merge Contacts** dialog opens.
3. Click **Yes** on the **Merge Contacts** pop-up.

   The **Contact Profile** (Windows) or the **Contact Editor** (Mac)window opens.
4. Edit any of the fields that need to be changed.
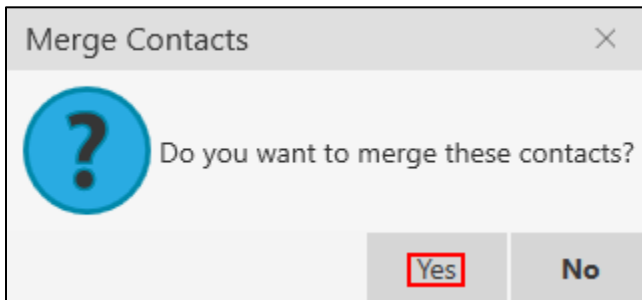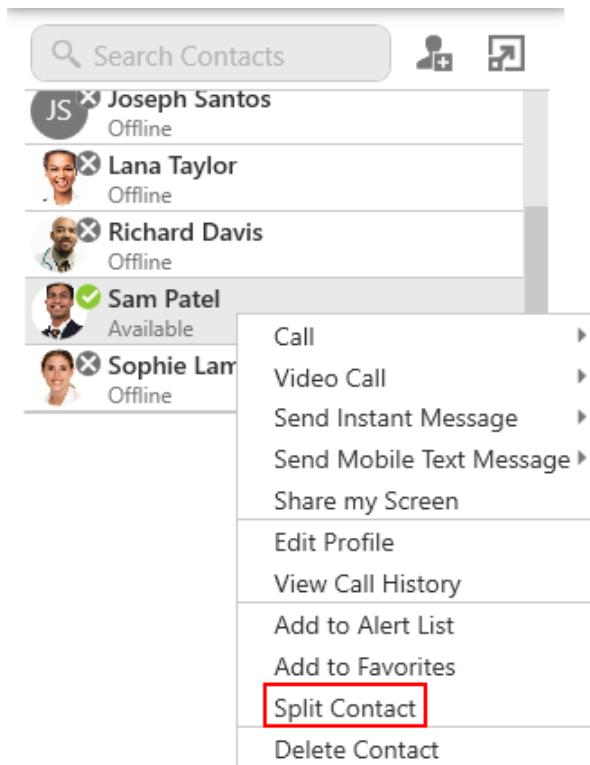5. Click **OK**.

The contacts are merged into a single contact.

Splitting Contacts

If you want to separate a local merged contact back into separate contacts, you can split the contact.
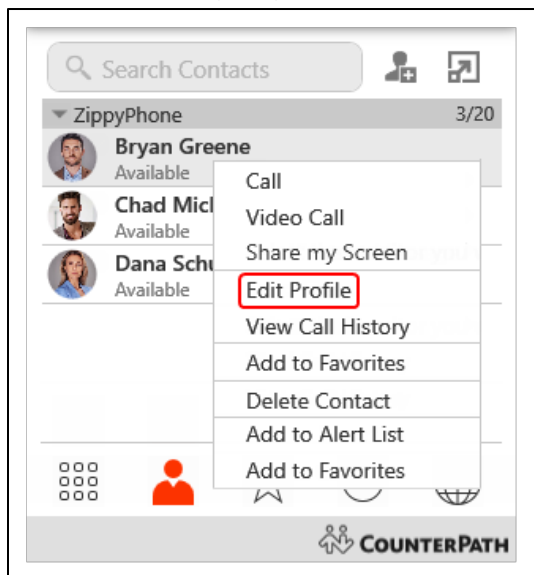
To Split Contacts Using the Shortcut Menu

1. Right-click (Windows) or `CTRL`+click (Mac) on a contact and click **Split Contact.**

Bria splits that contact into the original contacts.

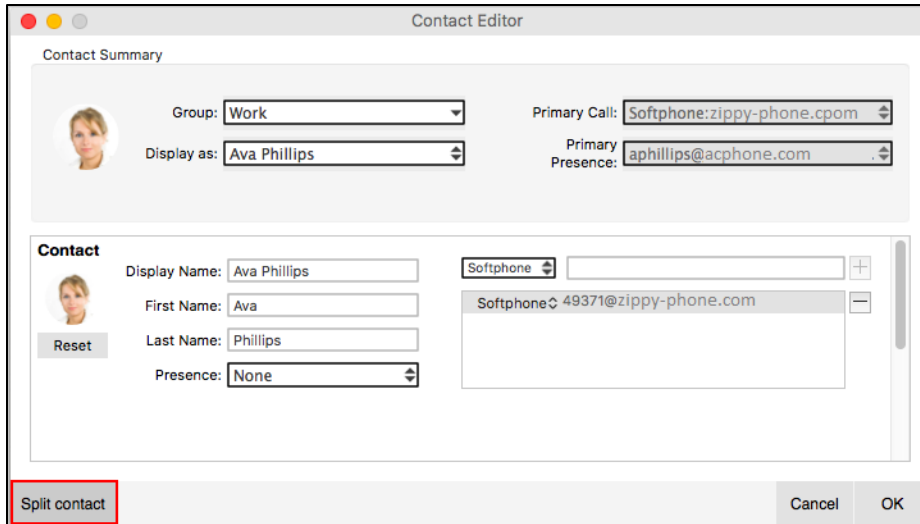## To Split a Contact Using the Contact Profile

1. Right-click (Windows) or `CTRL`+click (Mac) on a contact and select **Edit Profile** (Windows) or View/Edit Profile (Mac).

The **Contact** Profile (Windows) or the **Contact Editor** (Mac) opens.
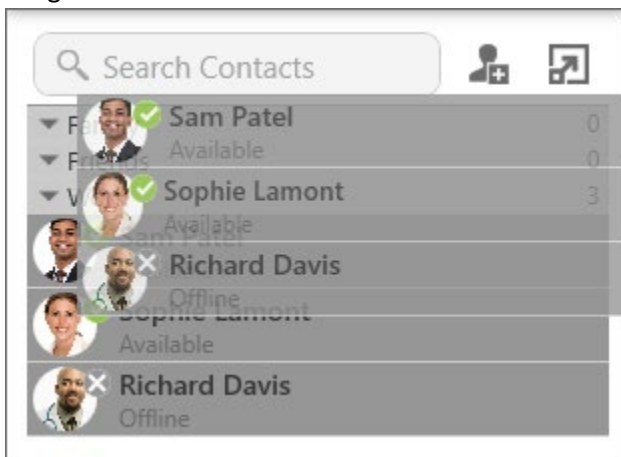2. Click **Split Contact**.

The contact is splits into the original contacts.

Changing Contact Groups

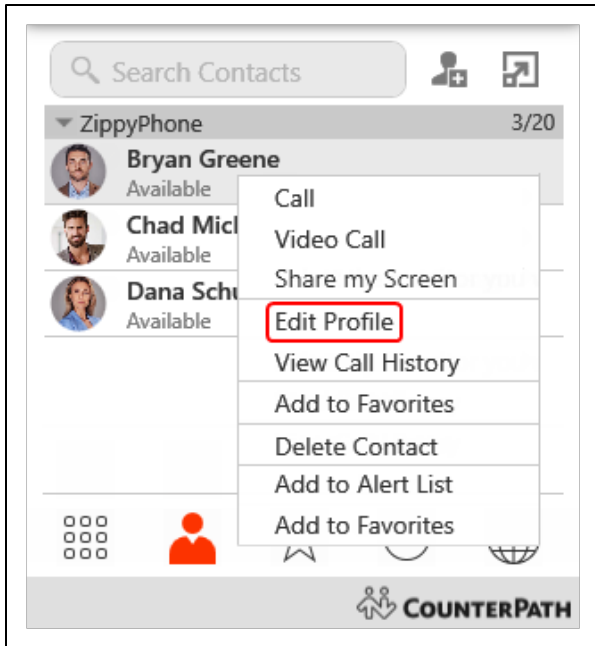### To Move Contacts to Another Group

1. In the contacts panel, use `Shift`+Click, `Ctrl`+Click (Windows), `Command`+Click (Mac) or a combination to select one or more contacts you want to move to another group.
2. Drag the selected contacts to the title bar of the new group.

The contact or contacts are removed from the old group and added to the new group.

To Add and Remove Contacts from Multiple Groups Using the Contact Profile

1. Right-click (Windows) or `CTRL`+click (Mac) on a contact and select **Edit Profile** (Windows) or **View/Edit Profile** (Mac).

The **Contact Profile** (Windows) or the **Contact Editor** (Mac) window opens.

2. Click the drop-down arrow in **Group**. Select the groups you want to add the contact to and deselect the groups you want to remove the contact from.
3. Click **OK**.

The contact is added to all groups you selected and removed from all groups you deselected.

To Remove a Contact from a Single Group

If a contact is in multiple groups, you can remove them from one of the groups.

1. Use `Shift`+Click, `Ctrl`+Click (Windows), `Command`+Click (Mac) or a combination to select one or more contacts you want to remove from a group. Make sure you select the contact or contacts in the group you want to delete them from.
2. Right-click (Windows) or `CTRL`+click (Mac) and click **Delete Contact** for an individual contact or **Delete Selected** for multiple contacts.
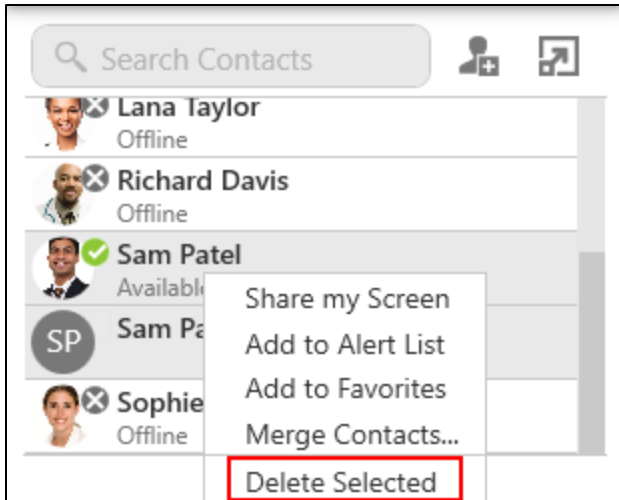
3. If the contact belongs to more than one group, clear **Delete this contact from all groups** or **Delete these contacts from all groups**. Click Yes in the **Delete Contact** dialog.
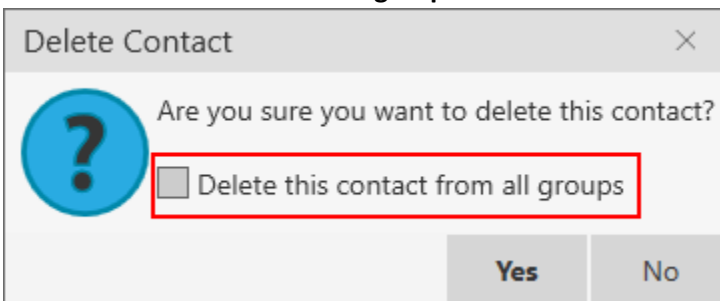

The contact or contacts are removed from the group. They remain in any other groups they belonged to.

Deleting a Contact

You can delete a single contact or a group of contacts from Bria. G-Suite contacts cannot be deleted. To remove G-Suite contacts, remove them from G-Suite or delete your G-Suite account from Bria.

1. In the contact panel, use `Shift`+Click, `Ctrl`+Click (Windows), `Command`+Click (Mac), or any combination to select the contacts you want to delete.
2. Right-click (Windows) or `CTRL`+click (Mac) and select **Delete Contact** or **Delete Selected**.
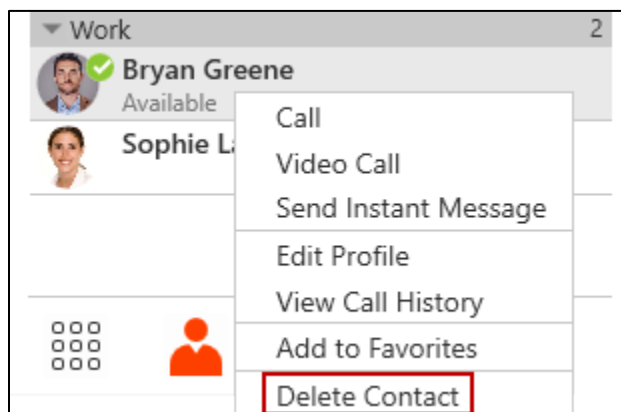
3. If the contact belongs to more than one group, leave **Delete this contact from all groups** or **Delete these contacts from all groups selected**. Click **Yes**.
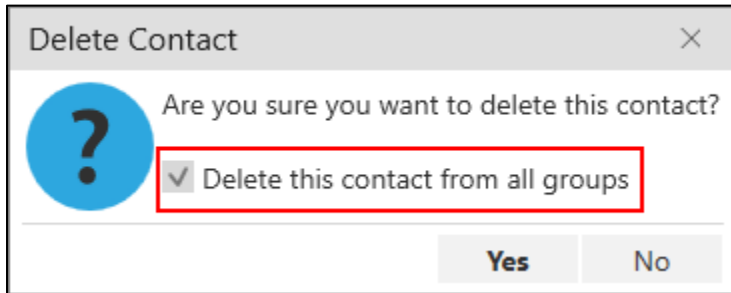
The contacts are deleted.

Managing Groups

Contacts are arranged in groups. Bria has three default groups: Family, Friends, and Work. There are two types of groups in Bria – local groups and a Bria group. The Bria group is read only; if you notice something need changing, talk to the administrator of your team who set you up on Bria.

If you have your G-Suite account added to Bria, you see the same groups from G-Suite in Bria. These groups have ![G] on them as an identifier. G-Suite groups are read-only in Bria. If you want to make a change to the G-Suite groups, make the changes directly through G-Suite.

Each contact must belong to at least one group and can belong to multiple groups. You can create, rename, and delete local groups.

As well as organizing your contacts, you can perform the following actions on local groups instead of on individual contacts:
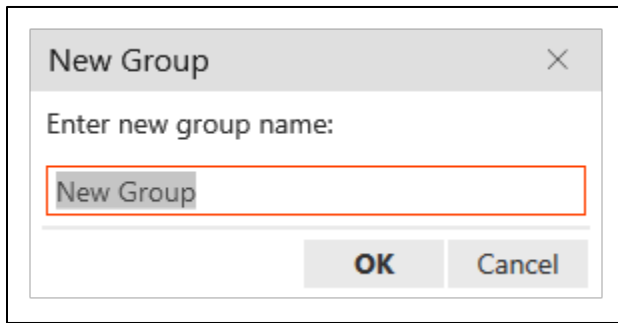
Creating a Group

Use the shortcut menu or the **Contacts** menu to create a new local group.

1. Right-click (Windows) or CTRL+click (Mac) on a group in contacts from the shortcut menu.
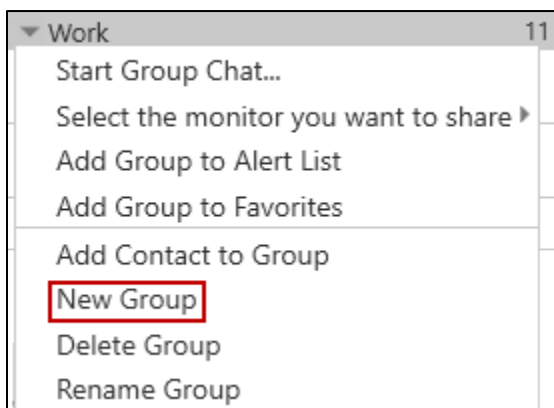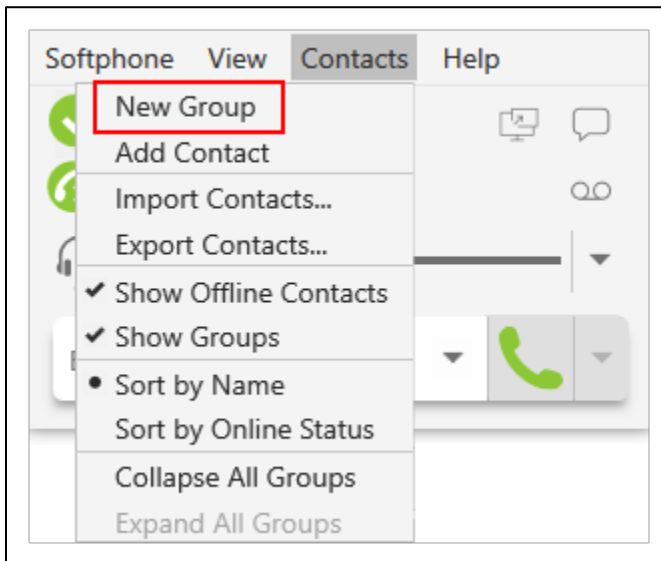
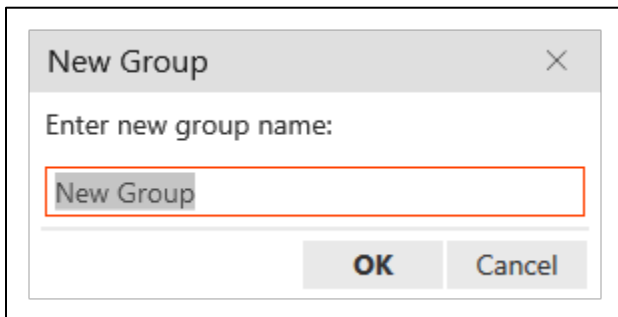2. Type in a group name in the **New Group** window and click **OK**.

The new **Group** is displayed in the **List of contacts**.

To Create a New Group Using the Contacts Menu

1. Click **New Group** on the **Contacts** menu.

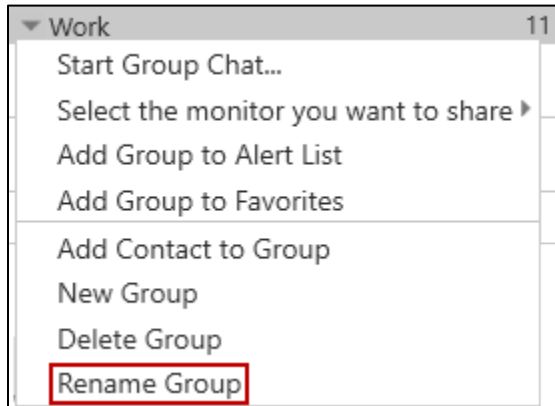2. Type in a group name in the **New Group** window and click **OK**.

The new **Group** is displayed in **Contacts**.
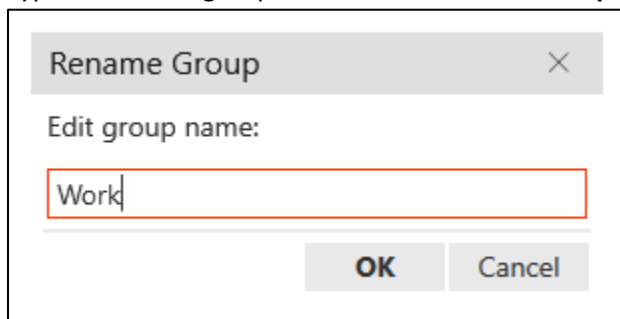
Renaming a Group

You can rename Bria groups. You cannot rename G-Suite groups.

To Rename a Local Group Using the Shortcut Menu

1. Right-click on a group in **Contacts** and select **Rename Group.**

2. Type in the new group name in the **Rename Group** window and click **OK**.

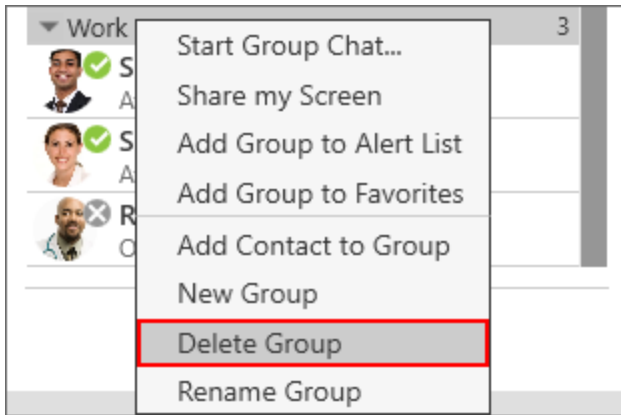The Group appears with the new name in the **List of contacts.**

Deleting Groups

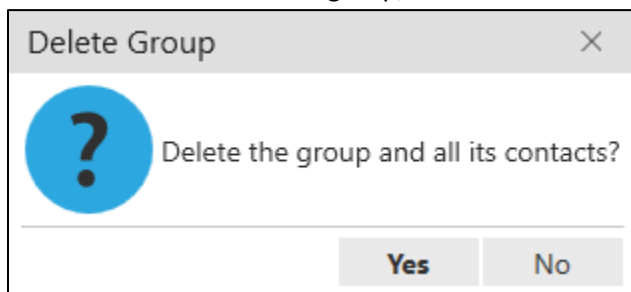You can delete local groups from Bria. You cannot delete G-Suite groups.

To Delete a Local Group

1. Right-click (Windows) or `CTRL`+click (Mac) on a group in contacts and select **Delete Group.**

2. If there are contacts in the group, click **Yes** in **Delete Group.**

The **Group** is deleted from contacts. Any contacts that were not in another group are deleted