



NetVanta Unified Communications Technical Note

Configuring the CounterPath X-Lite SIP Softphone

Introduction

CounterPath X-Lite is a free Session Initiation Protocol (SIP)-based softphone that is interoperable with NetVanta Unified Communications products. X-Lite is not automatically detected or configured by the NetVanta Enterprise Communications Server, and therefore requires manual configuration for use with the UC server. This technical note describes the steps to configure the X-Lite client for use with the UC server.



Configuring the Softphone

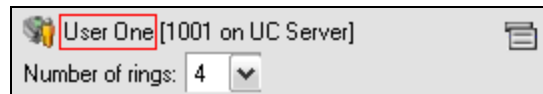
Gathering Information

To configure X-Lite, you need the following information:

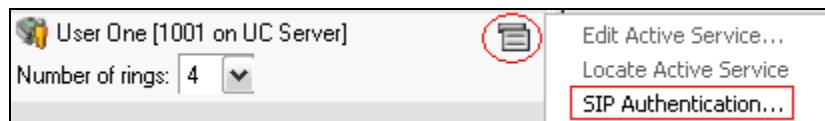
- Name** Equivalent to the name of the identity you want to associate with X-Lite.
- User Name** The SIP authentication identifier associated with the above identity. This is required by any SIP endpoint to register with the SIP private branch exchange (PBX).
- Password** The SIP authentication password associated with the above identity. This is typically (but not always) the same value as your voicemail access PIN.

Determining the Authentication ID and Password as the User (that owns the identity)

1. Launch the UC client.
2. Log in as the user you want to associate to the phone.
3. Take note of the identity name located in the **Identities** pane at bottom left portion of the menu (**User One** in this example).



4. In the **Identities** pane, select the icon on the right to reveal the drop-down list, and select **SIP Authentication**.

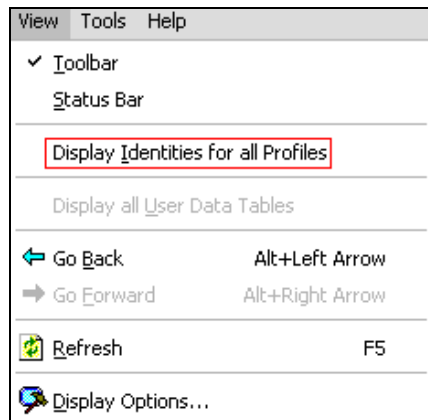


5. Record the **User/login name** and **Password** from the **SIP Authentication** dialog box. You will need them later when you configure the phone.

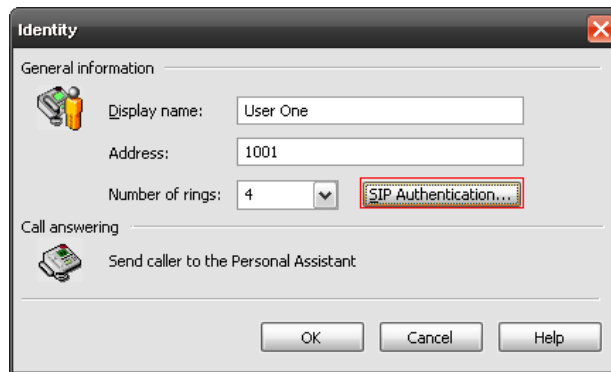


Determining the Authentication ID and Password as the Administrator

1. Launch the UC client.
2. Log in as the admin user.
3. Select the **Identities** icon located in the **Administration Navigation** pane.
4. From the menu bar, select **View > Display Identities for all Profiles**.



5. Find the identity in the list that you want to use and double-click the entry.
6. In the **Identity** dialog box, select **SIP Authentication**.



7. Record the **User/login name** and **Password** from the **SIP Authentication** dialog box. You will need them later when you configure the phone.



Adding a SIP Account

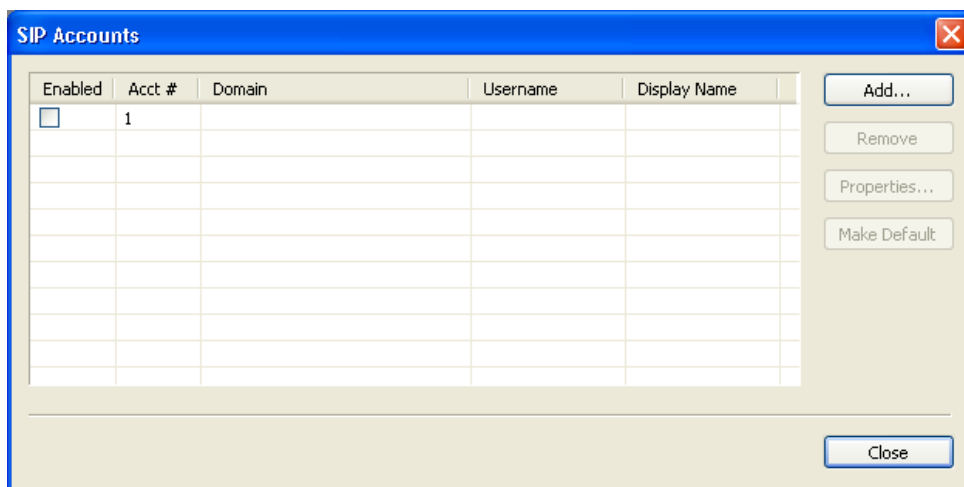
The figure below shows the CounterPath X-Lite client when it is run for the first time.



In order to use the X-Lite client with the UC server, you must add a SIP account.

Adding a SIP Account

1. Right-click anywhere on the X-Lite client and select **SIP Account Settings**. The following menu will appear:

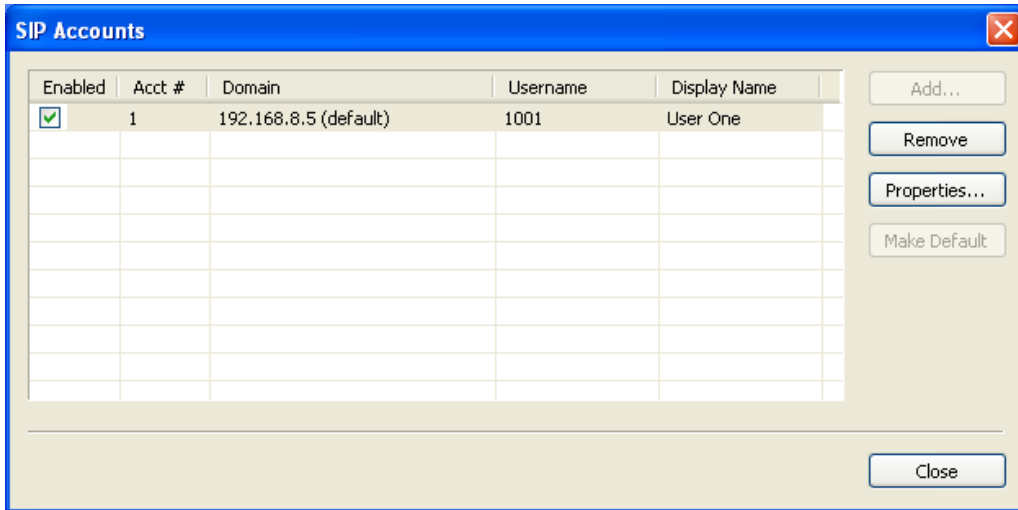


2. Select the **Add** button to reveal the **Properties** menu.

The screenshot shows a dialog box titled "Properties of Account1" with a blue border and a close button in the top right corner. It has five tabs: "Account", "Voicemail", "Topology", "Presence", and "Advanced". The "Account" tab is active. The "User Details" section includes five text input fields: "Display Name" (User One), "User name" (1001), "Password" (masked with dots), "Authorization user name" (1001), and "Domain" (192.168.8.5). The "Domain Proxy" section has a checked checkbox "Register with domain and receive incoming calls". Below it, "Send outbound via:" has three radio buttons: "domain", "proxy" (with an "Address" field next to it), and "target domain" (which is selected). At the bottom, there is a "Dialing plan" field with the value "#1\|a.T;match=1;prestrip=2;". At the very bottom are three buttons: "OK", "Cancel", and "Apply".

3. In the **Display Name** field, enter your name as you would like others to see it. For example, **User One**.
4. In the **User name** field, enter your identity (extension) number. For example, **1001**.
5. In the **Password** field, enter the password associated with your identity. For example, **1001**.
NOTE: *Contact your system administrator for your password.*
6. In the **Authorization user name** field, enter the user name associated with your identity. For example, **1001**.
7. In the **Domain** field, enter the IP address or domain naming system (DNS) name for the UC server. For example, **192.168.8.5** or **ucserver.company.com**.
8. Make sure that the **Register with domain and receive incoming calls** box is checked.
9. In the **Send outbound via** section, make sure that the **target domain** option is selected.

10. Select **OK** to reveal the **SIP Accounts** menu.



11. Select **Close** to complete the registration.

The X-Lite client will attempt to register with the UC server. If all of the parameters are entered correctly, the text in the main window will appear as follows:

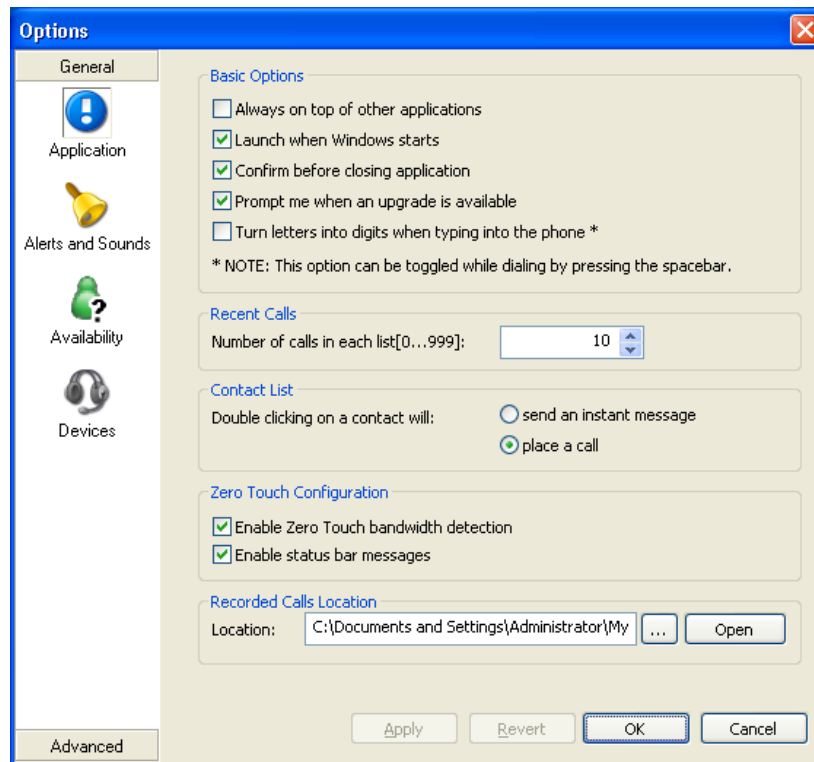


You are now ready to place and receive calls.

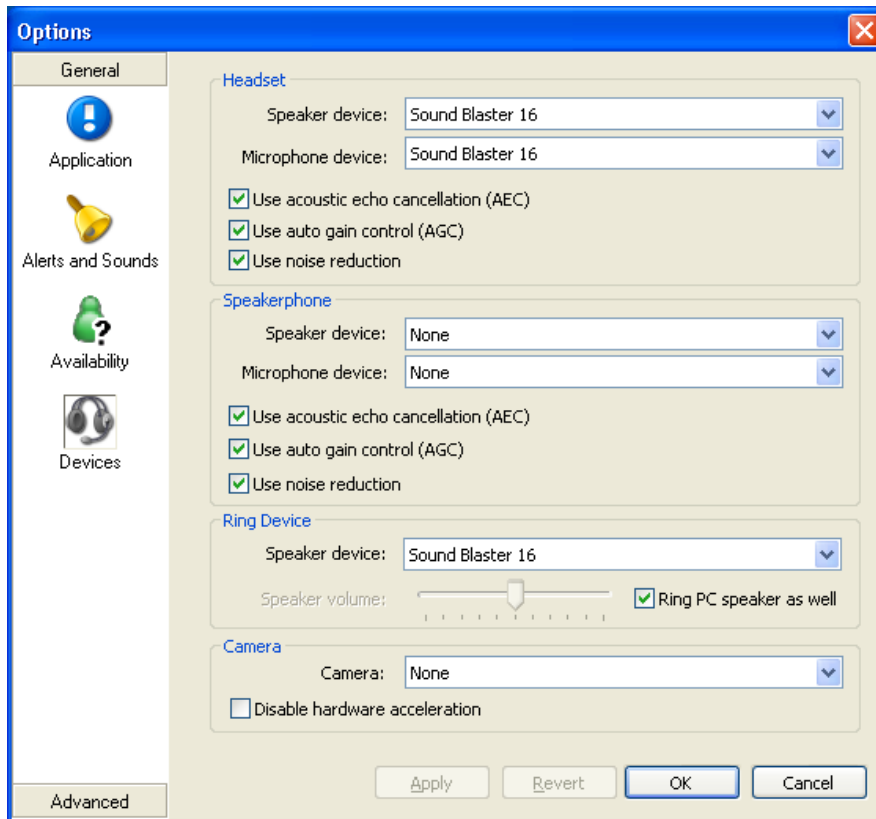
Configuring Audio

The CounterPath X-Lite client will automatically detect any available sound devices and will select the default sound device as specified by the Windows® Operating System. In order to verify that you are using the correct sound device, or if you have a headset that you would like to use instead, complete the following steps:

1. Right-click anywhere on the **X-Lite** window and select **Options** to reveal the **Options** menu.



2. Select **Devices** on the left-hand side of the **Options** menu.



3. Under **Headset**, select the correct **Speaker device** and **Microphone device** from the drop-down menus.
4. Under **Speakerphone**, you can optionally select what sound device you would like to use for a speakerphone from the drop-down menus.
5. Under **Ring Device**, you can optionally select what sound device you would like to use to be alerted that your phone is ringing and whether to use the PC speaker also.
6. Leave all other options/check boxes with the default values.
7. Select **OK**.

Additional Functionality

You will notice that there is a small white arrow on the right-hand side of the main X-Lite window. Selecting this arrow will reveal the **Calls & Contacts** menu.



The **Calls & Contacts** menu reveals the call history (missed, received, dialed, and blocked calls), and also allows you to configure your contacts. The following diagram shows the **Contacts** tab.

