

Solgari

 Microsoft
Dynamics 365

 calltower

Solgari for Dynamics 365

User Guide



1. Installation

How to install Solgari for MS Teams

- How to install Solgari for Dynamics 365
- How to get Installation Support for Solgari for Dynamics 365

2. Overview

Quick Start Guide

- How to access your inbox
- How to start an outbound call
- Where to locate your contacts
- How to search your contacts
- How to set your Status

3. Voice

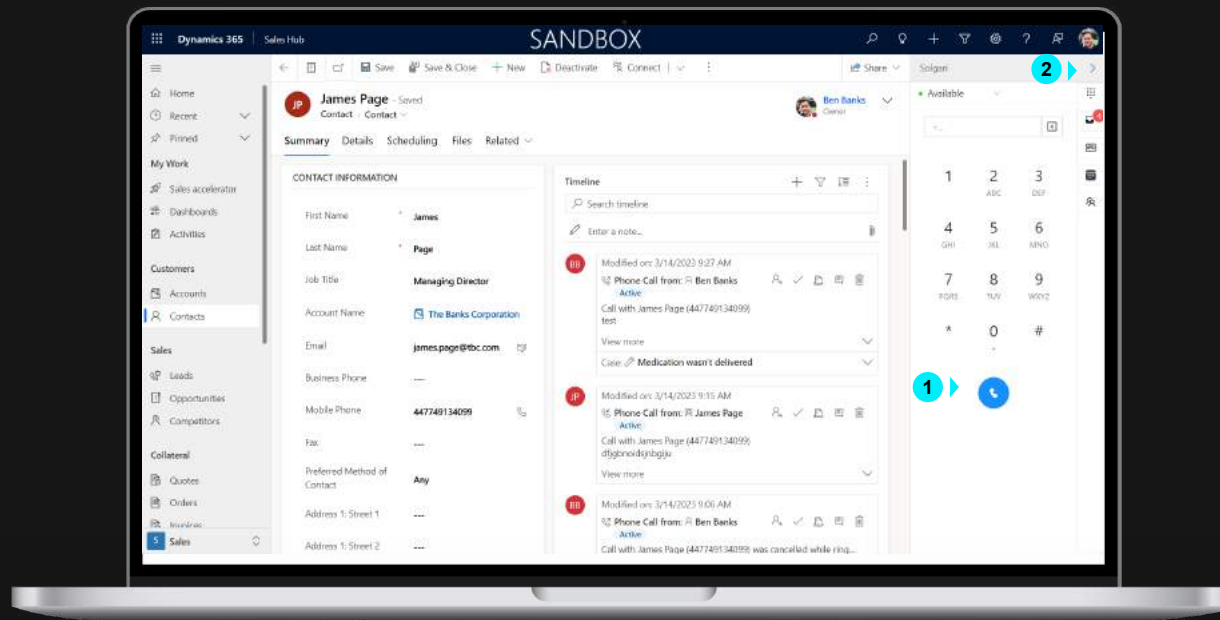
How to use the voice function

- How to answer an incoming call
- How to make an outbound call
- How to use click to call
- How to mute a call
- How to place a call on hold
- How to transfer a call
- How to playback a call recording
- How to log call activity
- How to relate to an activity
- How to log a call note
- How to locate call activity
- How to locate message activity

4. Messaging

How to use the messaging function

- How to select a message
- Know your contact
- How to send a message
- How to respond to a message
- How to end a conversation
- How to close a channel
- Where is the contact's information
- How to create a new CRM record
- How to open the CRM
- How to relate a message to a CRM record
- How to send an outbound SMS
- How to reply to an SMS message
- How to Click to Text
- Where to locate the message history
- How to filter by date
- How to filter by channel
- Where to locate the contact's name
- Where to locate the conversation transcription
- Search the CRM by client name



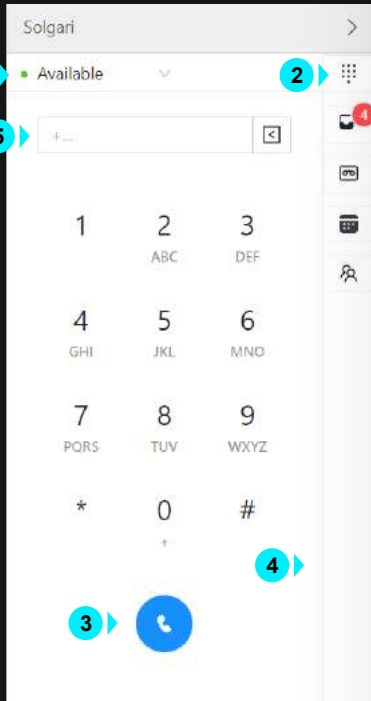
Channel Integration Framework – This is where Solgari for D365 lives alongside D365. If you want Solgari added like shown in the image, then you will need to speak to your D365 administrator.

1 Solgari for D365

Solgari for D365 is your all channel communication tool that works with all D365 CE modules. You can make and receive voice calls, respond to a text or business Facebook or WhatsApp message and log notes and interactions back into D365.

- 2 Expand or Minimize Side Bar Solgari for D365 can be expand to show the UI like in the image to your left but it can also be minimized when you're not using it.

Dial Pad



1 Status

This is where you select your status, for example, Busy, Available, Unavailable. If you make or receive a call or message, then your presence will automatically be set to Busy or On a call.

2 Dial Pad

Use your mouse to select the appropriate number to dial or use your numpad on your keyboard to enter the number.

3 Dial button

Once you have entered your number, please select the dial button or press enter on your keyboard to make an outbound call.

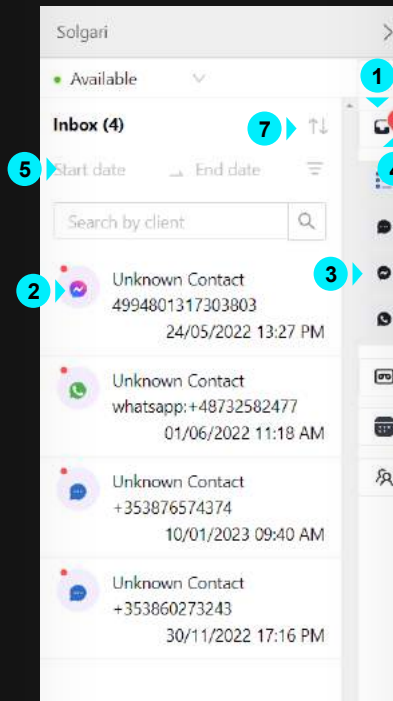
4 Side Bar

This is where you can select Dialpad, History or Contact Records.

5 Enter Number

Enter a phone number here.

Inbox



1 Inbox

Inbox is where all messaging communication from Social Channels and SMS can be found and responded to.

2 Message in the inbox

Select the message in the inbox that you would like to respond to.

3 Filter by channel

You can filter the inbox if you have for example multiple WhatsApp, Facebook and SMS messages.

4 Inbox Notifications

This will let you know how many messages are awaiting your attention.

5 Filter by date

You can filter any message and transcription from a Start and End date.

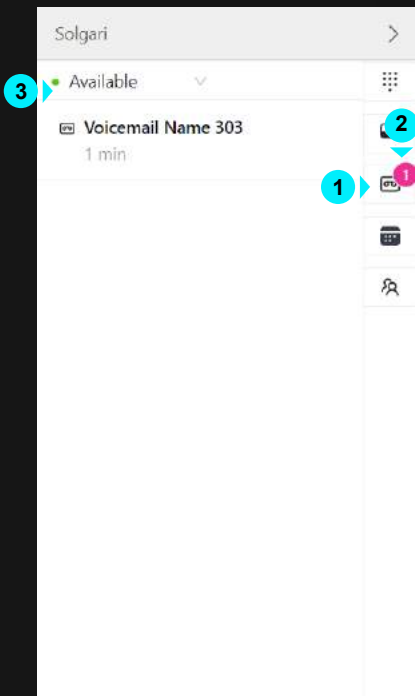
6 Filter by channel

Select a specific channel and message within the channel.

7 Filter Newest or Oldest

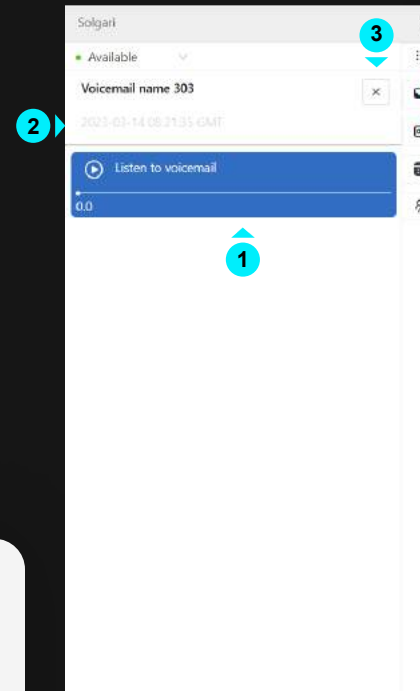
Message You can filter all message in the inbox "Most recent first or Oldest First)

Voicemail Inbox



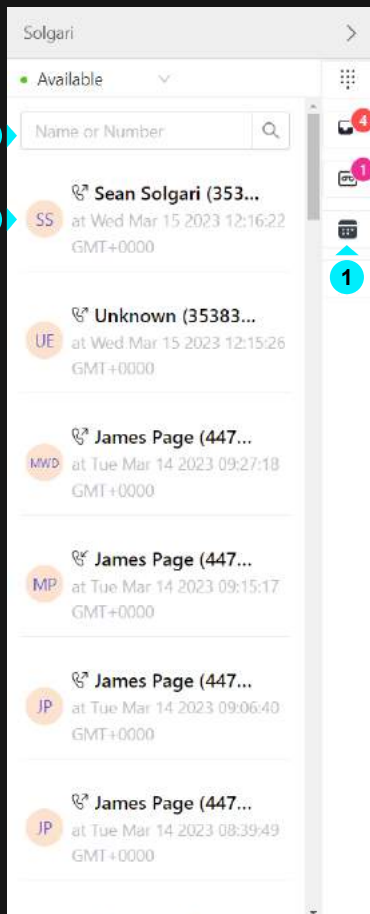
- 1 Voicemail Inbox** here you can access all voicemails that have been left on your extension.
- 2 Voicemail Notifications** You will see notifications and number of voicemails here.
- 3 Voicemail Message** Once you have selected “Voicemail Inbox” you will then be able to select and open a specific voicemail message for more details.

Voicemail Message



- 1 Play Voicemail** Press the play icon to listen to
- 2 Voicemail Message Details** This is where you can see details about your voice. You will be able to see the date and time of when the voicemail was left.
- 3 Close Voicemail Message** Select the cross icon to close the specific message and return to Voicemail Inbox.

Recent Channel Activities



1 Recent Channel Activates

Select recent channel activities to see all previous voice conversations and message transcripts.

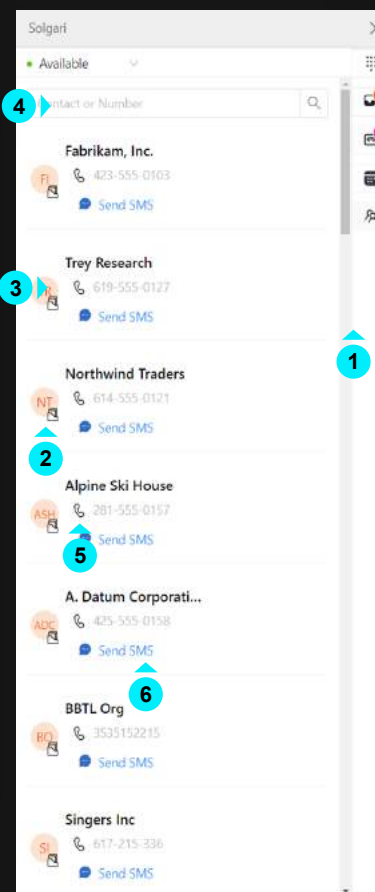
2 Activity Entry

Select an activity to expand on the details behind the activity like the call recording or message transcript and date and duration of the activity.

3 Search Activity Entries

Search for a specific activity by typing the name or number of your contact.

CRM Records



1 CRM Records

By selecting CRM Records, you can search here for Accounts, Contacts or Leads within Dynamics 365. You can also click to call & click to text here.

2 Record Type

Hover over the record icon to see if it is an Account, Contact or Lead record.

3 Open CRM record in Dynamics 365

Select the contact icon to open the record in Dynamics 365

4 Search CRM Records

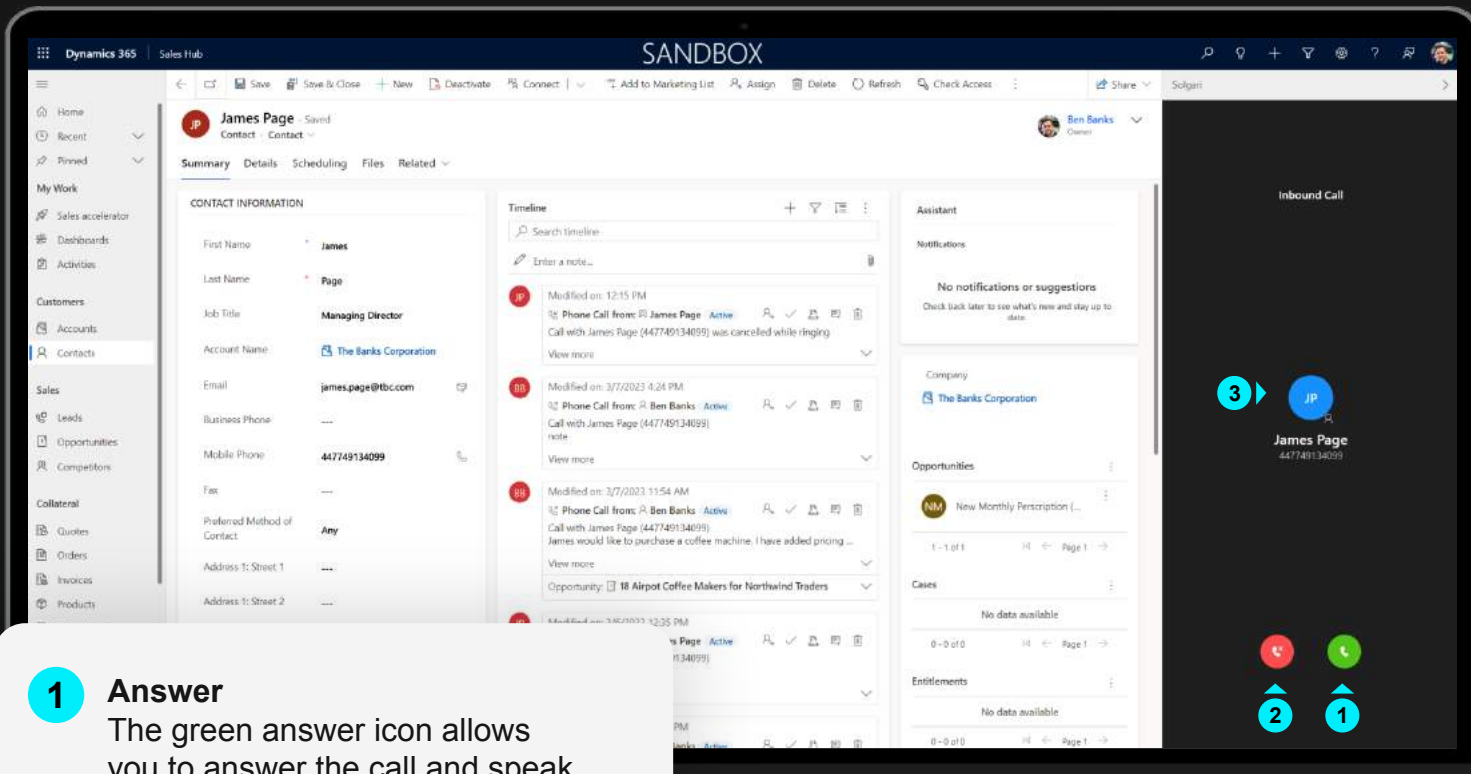
You can search for an Account, Contact or Lead by typing the name or number here.

5 Click to Call

Select number to make a call.

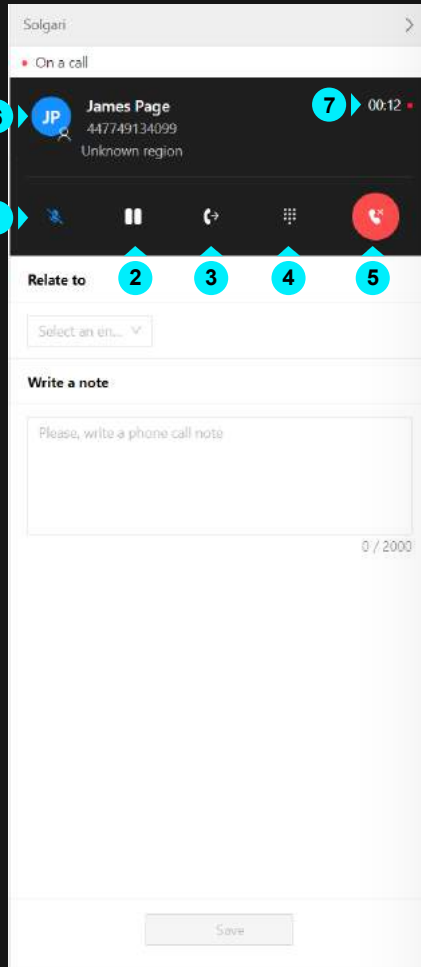
6 Click to text

Select "Send SMS" to start a text message.



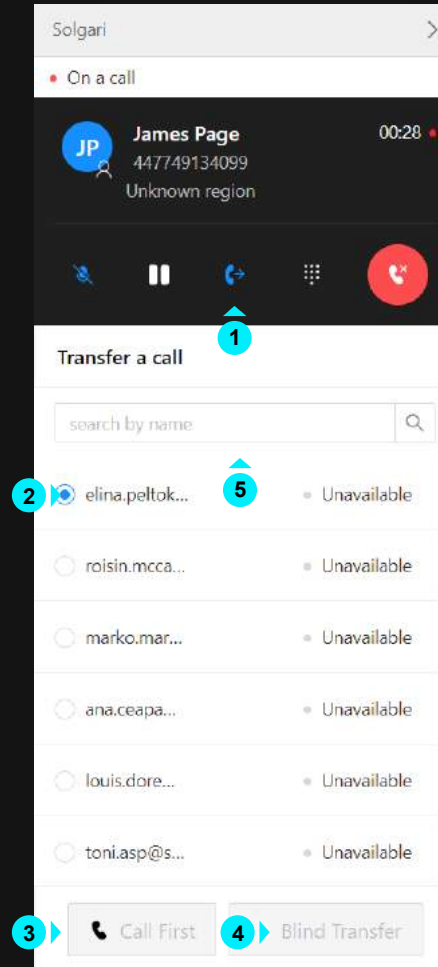
- 1 Answer**
The green answer icon allows you to answer the call and speak to your customer.
- 2 Decline**
The red decline icon can be selected to decline the call.
- 3 Open CRM record**
If you select the initials of the record, this will open the CRM record in D365.
- 3 Contact Information**

Call Controls

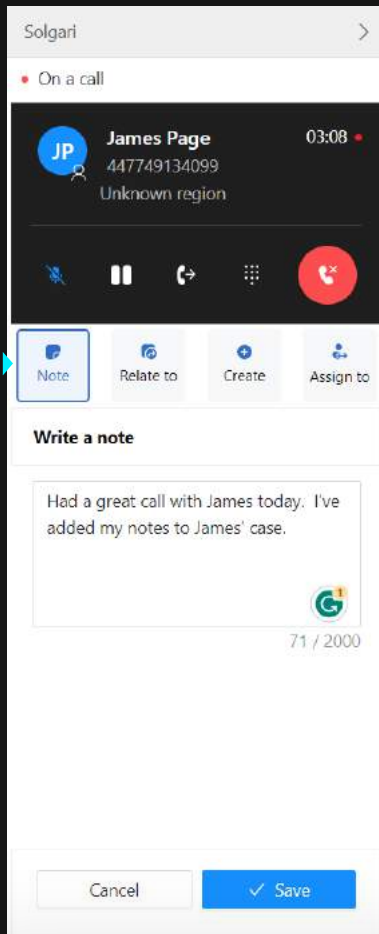


- 1 Mute**
Place your mic on mute so that the other party can't hear you. Select the icon again to take yourself off mute.
- 2 On Hold** You can place the customer on hold which will keep them waiting until you select the icon again to take them off hold.
- 3 Transfer**
You can blind transfer (send customer straight to your colleague) or call first (place customer on hold and announce them to your colleague before completing a transfer.)
- 4 Dial Pad**
The dial pad will be helpful if you have made a call and need to input a number to get through an IVR or when selecting options on a call.
- 5 Hang up call** By selecting the hang up button you will end the call for all parties.
- 6 Open CRM record**
If you select the initials of the record, this will open the CRM record in D365.
- 7 Call Duration**
Time spent on a call.

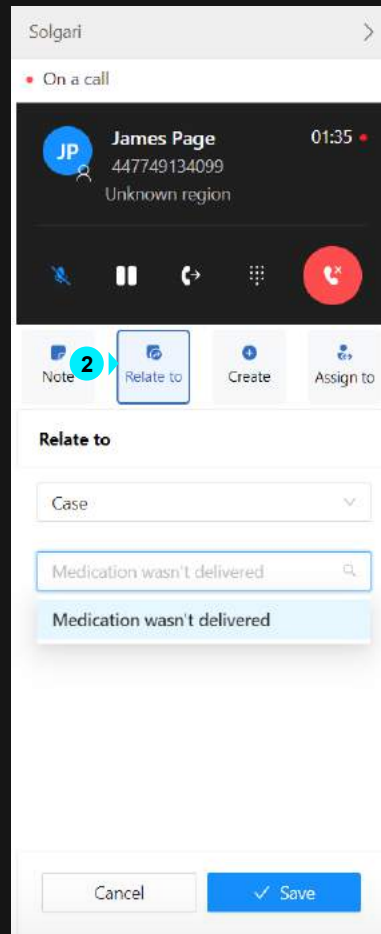
Transfer a Call



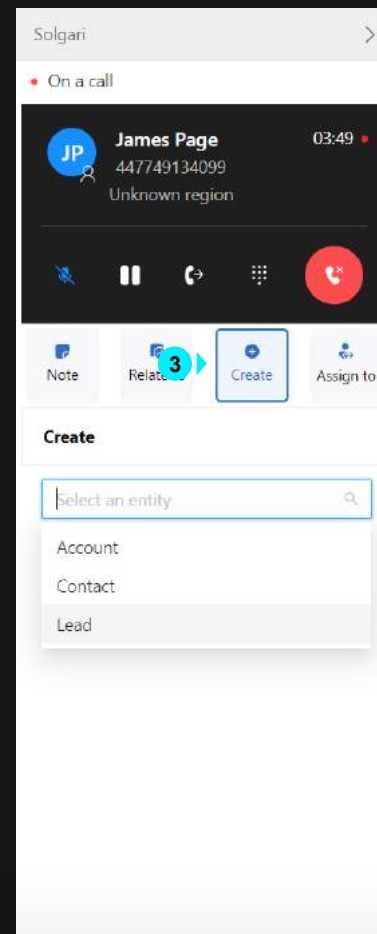
- 1 Select Transfer**
Select the transfer icon to give you more options.
- 2 Choose a colleague**
This is the person you are transferring the customer to.
- 3 Call First**
Place customer on hold and announce them to your colleague before completing a transfer.
- 4 Blind Transfer**
Send the customer straight to your colleague.
- 5 Search for agent**
you can type the name of the agent in the search box.



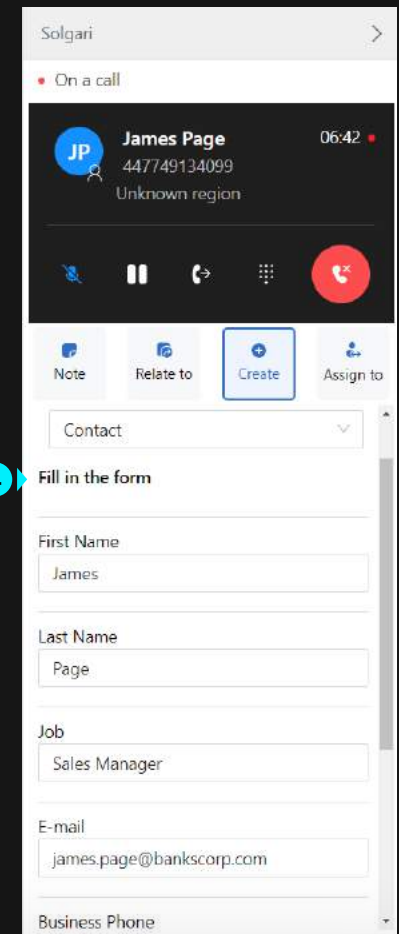
1 Notes
Add a note while on a call.



2 Relate to
Relate your note and activity to any entity in Dynamics 365 i.e., case or opportunity.



3 Create new record
You can create a new record while on a phone call i.e., Account, Contact, Lead, Case or Opportunity.



4 Record form
Required fields need to be completed to submit your new record form to Dynamics 365.

Log to a Call

Solgari

On a call

JP James Page 01:41
447749134099
Unknown region

Relate to

Opport... 18 Airpot Coffe...

Write a note

James would like to purchase a coffee machine. I have added pricing & purchase order to the opp!

97 / 2000

Save

- 1 Add a note**
while you're on the call and save it for future reference.
- 2 Save activity**
Make sure you select save when you have added your note. Don't worry will save it if you don't remember.
- 3 Select an Entity type to relate-to**
Choose for a list of entity options in this list for example case or quote.
- 4 Relate-to appropriate record**
Select the relevant case or opportunity to log your call notes and recording against.

Log a phone call activity

Call with James Page (447749134099) - Saved
Phone Call - Phone Call

Phone Call Related

Subject Call with James Page (447749134099)

Call From James Page

Call To Ben Banks

Phone Number 447749134099 Direction Incoming

Description

Had a good call

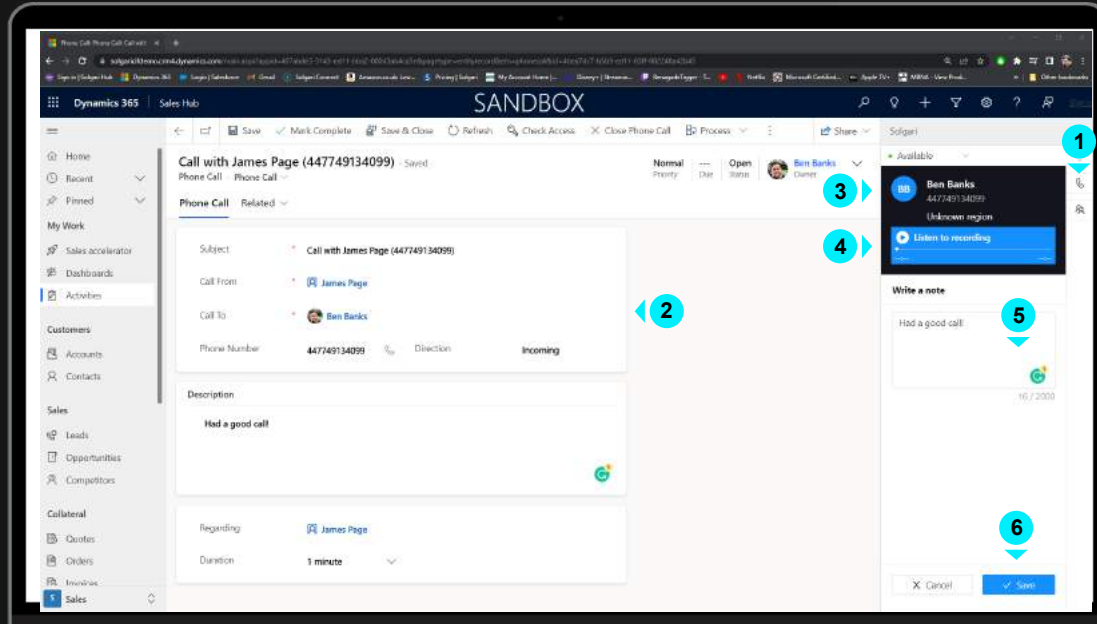
Regarding James Page

Duration 1 minute

What information is saved into D365?

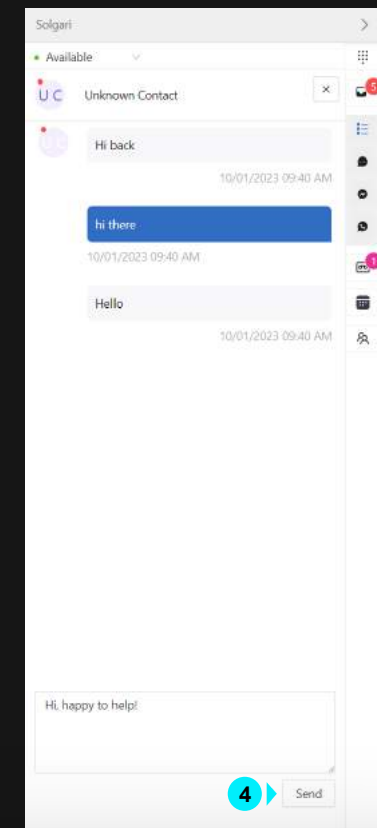
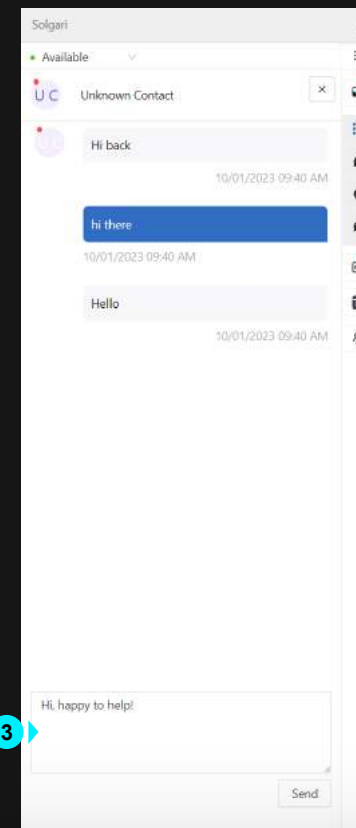
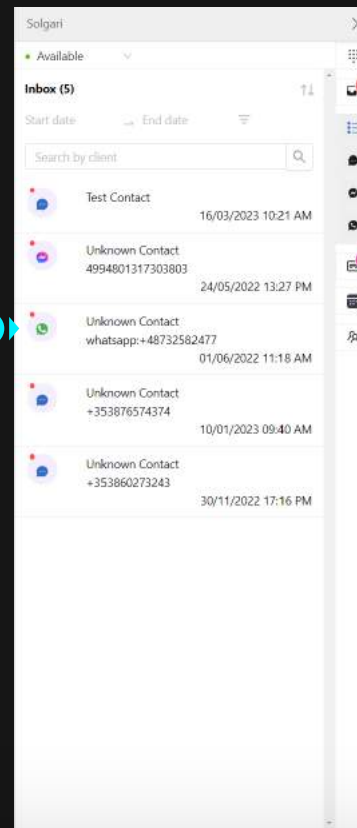
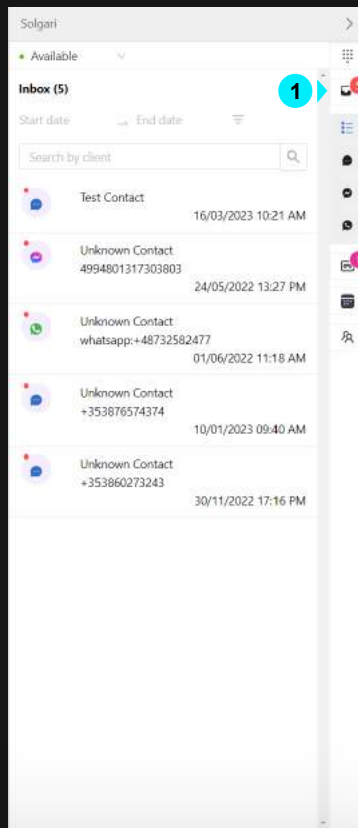
- 1 Call Duration** – the length of the call.
- 2 Call Note** – any notes made on a call or post call.
- 3 Related – to** – you will see if you have related the call to a case or other entities in D365.
- 4 Call Direction** – this tells you if it was an inbound or outbound call.

Dynamics 365 Activity & Call Recording Playback



- 1 Recent activities** - By selecting Activities or the little phone icon in Solgari's sidebar, then you will be taken to a list of activities.
- 2 Activity Details** - You will find information about a call or message when selecting a specific activity from the list.
- 3 Agent Name** - This shows the agent how they handled the call.
- 4 Call Recording Playback** - select play to listen back to your voice recording. You can also access call recordings in Solgari Hub (note you will need permissions to login)
- 5 Previous Notes & Add a note** - You can see any notes that were made on a call within Solgari, but you can also log post call notes if required.
- 6 Save notes** - Once selected, your notes and any related to will be saved into Dynamics against the record.

Respond to a message



1 Open Inbox
Select inbox to open all messaging sessions. You will know which channel the message has been received from by its icon.

2 Select message
Select the message you would like to respond to.

3 Type your response
Enter the text you would like to send.

4 Send message
Click "send" to reply to the message.



For more information

Let's Connect

