Solgari for Salesforce

User Guide

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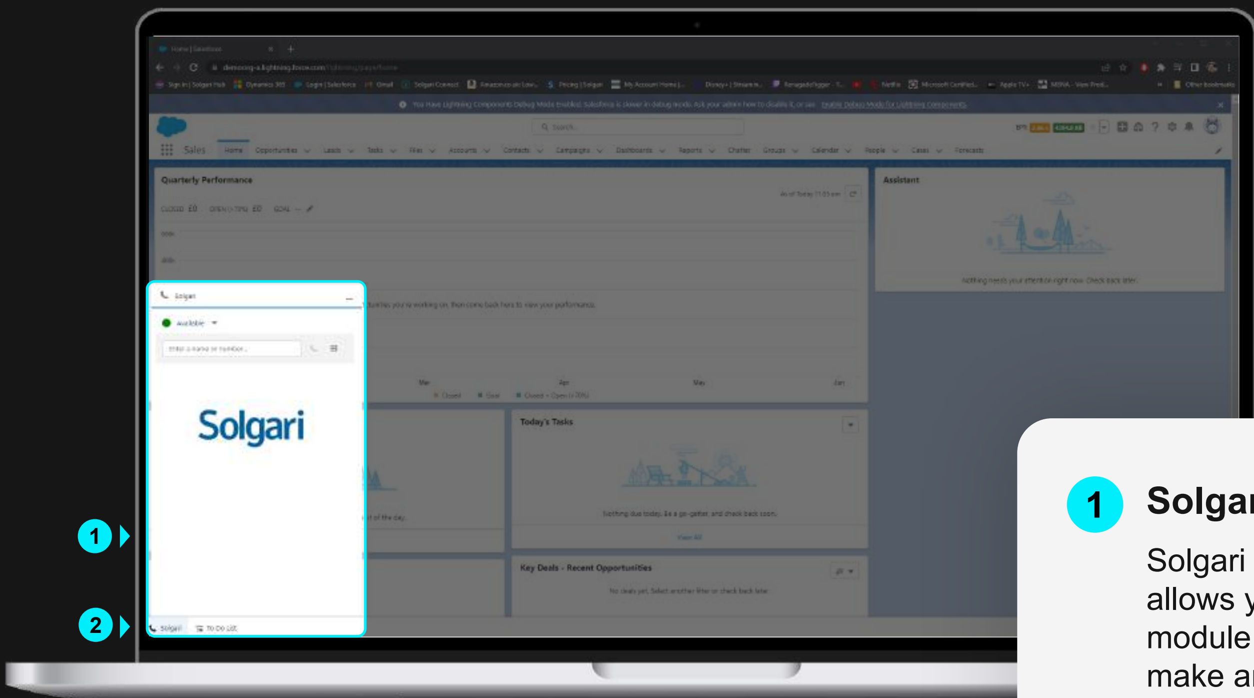
Solgari Voice Overview



1 **Solgari for Salesforce (Voice)**

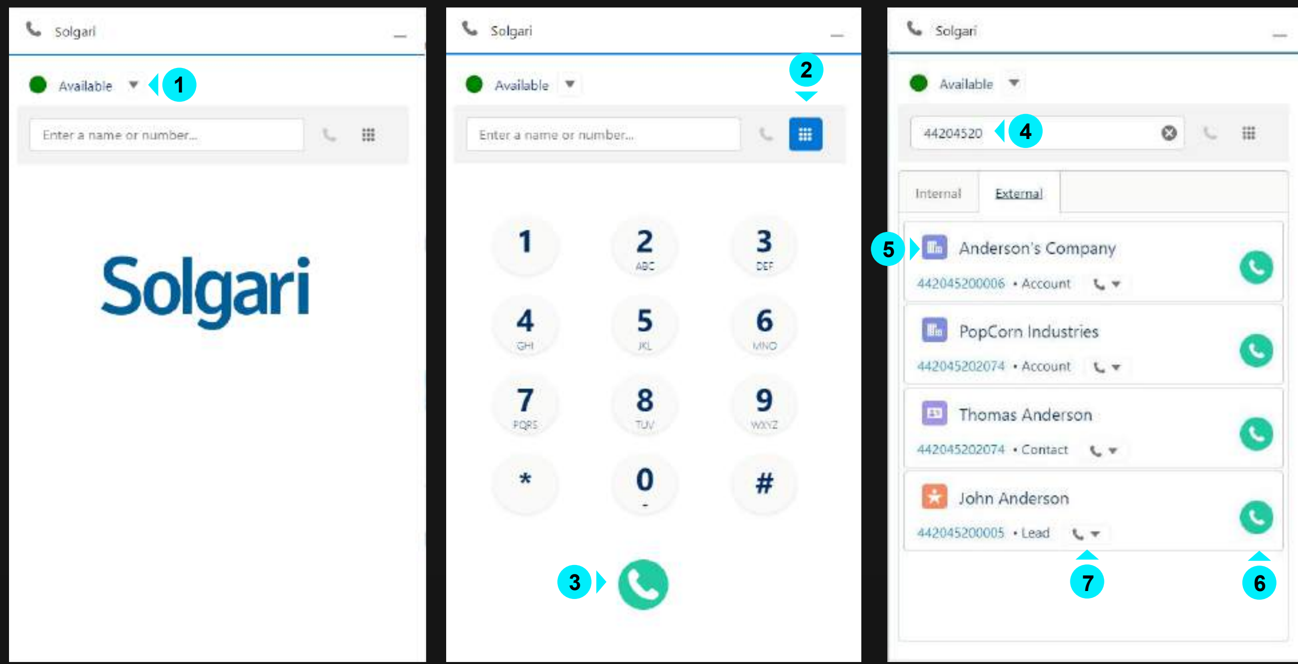
Solgari for Salesforce Voice allows you to add our calling module to Salesforce. You can make and receive phone calls from here.

2 **Salesforce Utility Bar**

Solgari for Salesforce can be accessed in the utility bar.

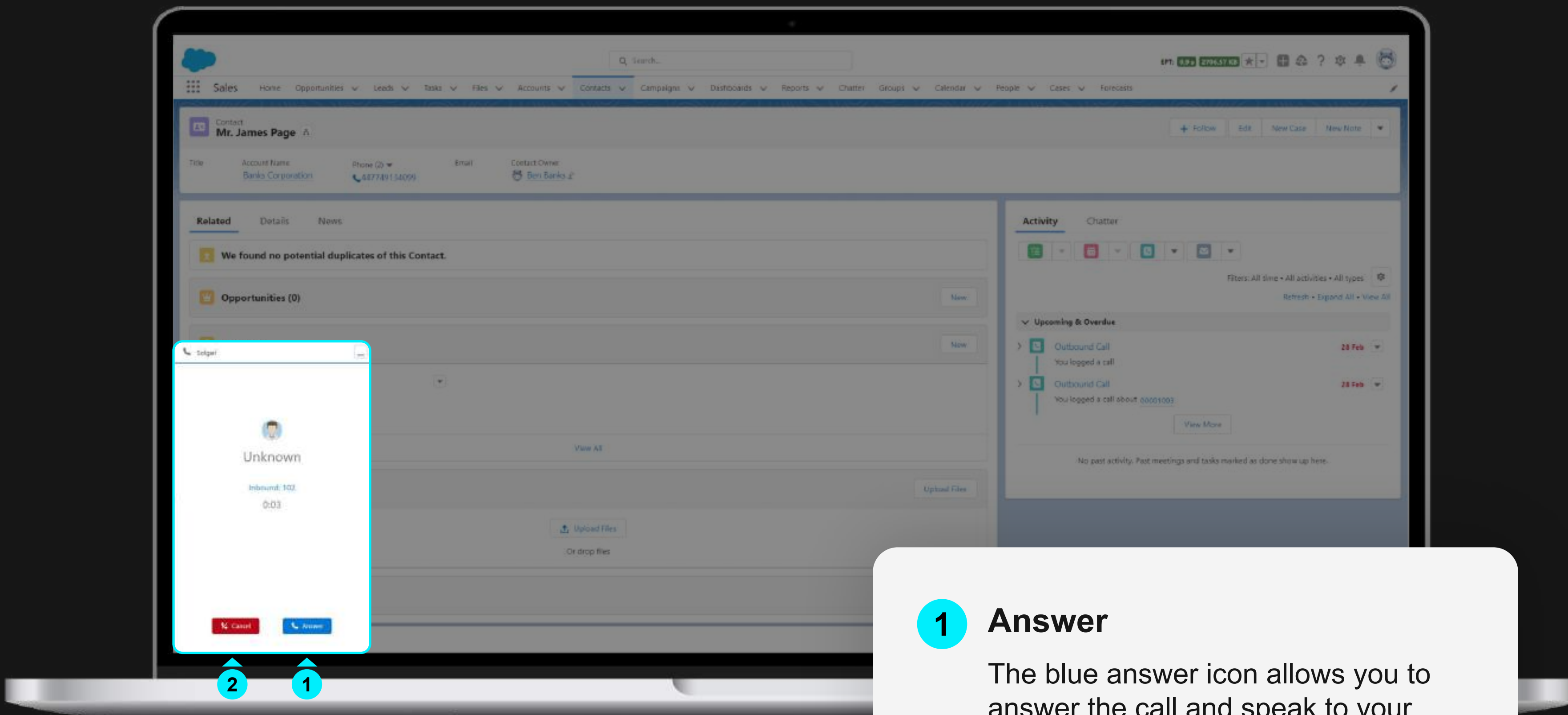
Expand or Minimize Solgari

You can select the Solgari call icon in the utility bar to close or open it.



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. **Search for a CRM record -** Search for a Lead, Account or Contact record by number or name.
5. **Open CRM Record -** Select the record icon to open in Salesforce.
6. **Click-to-call -** Select calling icon to make an outbound call.
7. **Choose preferred number -** Select drop down to choose landline or mobile number for calling.

How to answer & decline a call



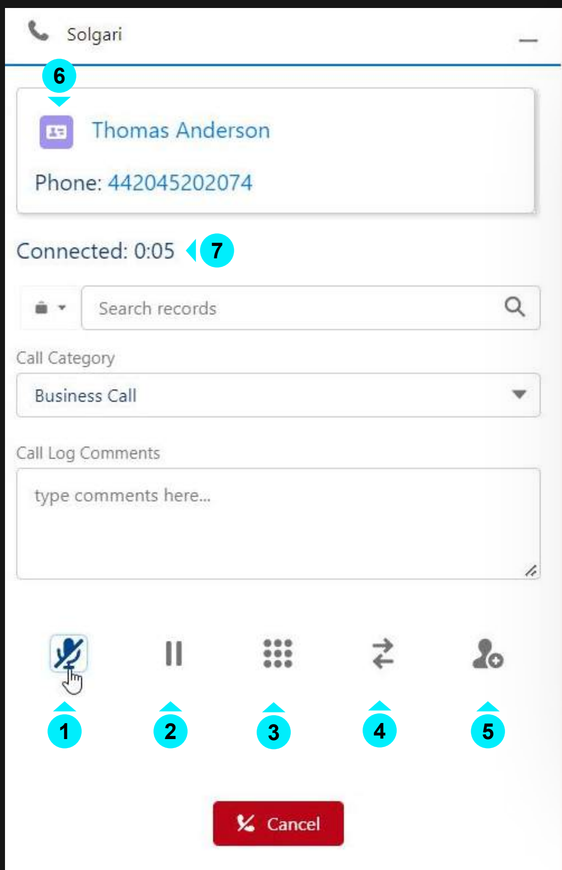
1 Answer

The blue answer icon allows you to answer the call and speak to your customer.

2 Cancel

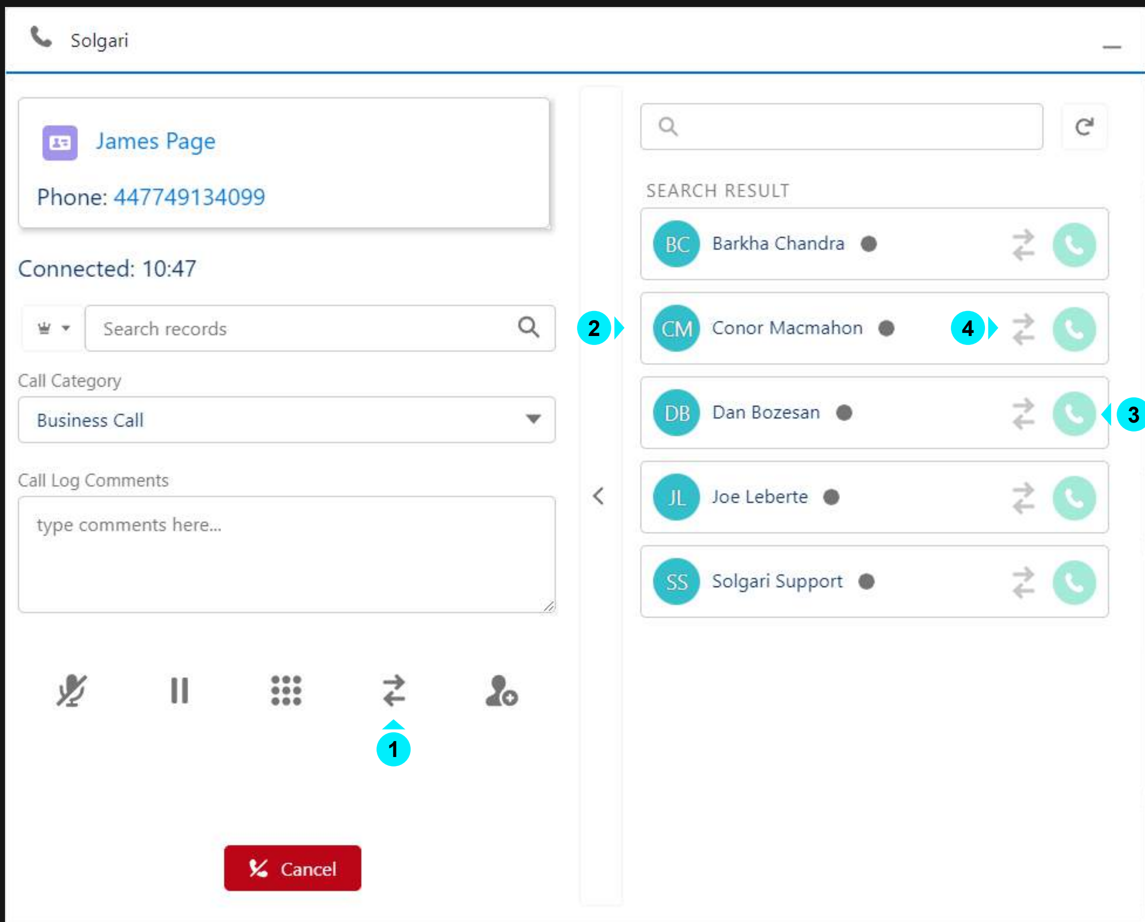
The red cancel icon can be selected to decline the call.

Call Control



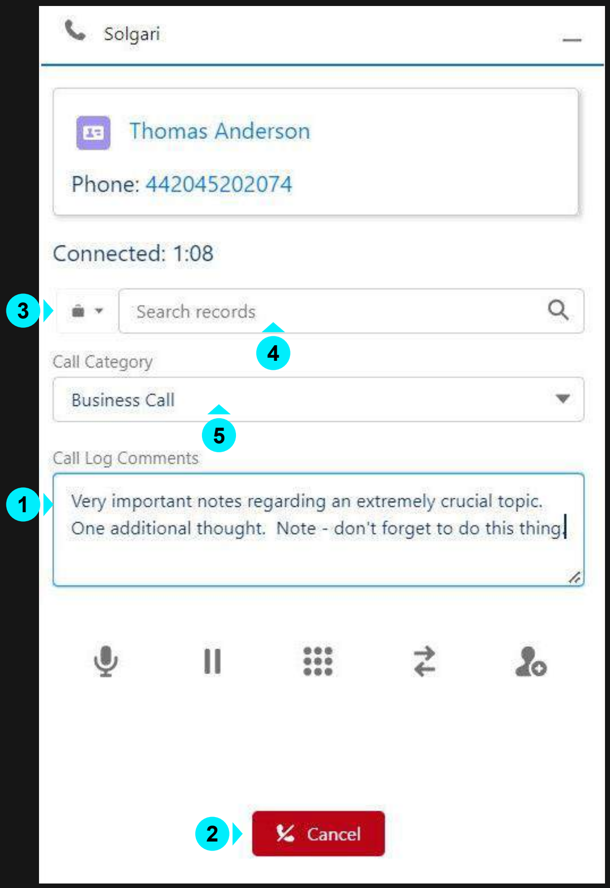
1. **Mute -** Place your mic on mute so that the other party can't hear you. Select the icon again to take yourself off mute.
2. **On-Hold -** You can place the customer on hold which will keep them waiting until you select the icon again to take them off hold.
3. **Dial Pad -** The dial pad will be 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.
4. **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.)
5. **Conference 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.

Call Control



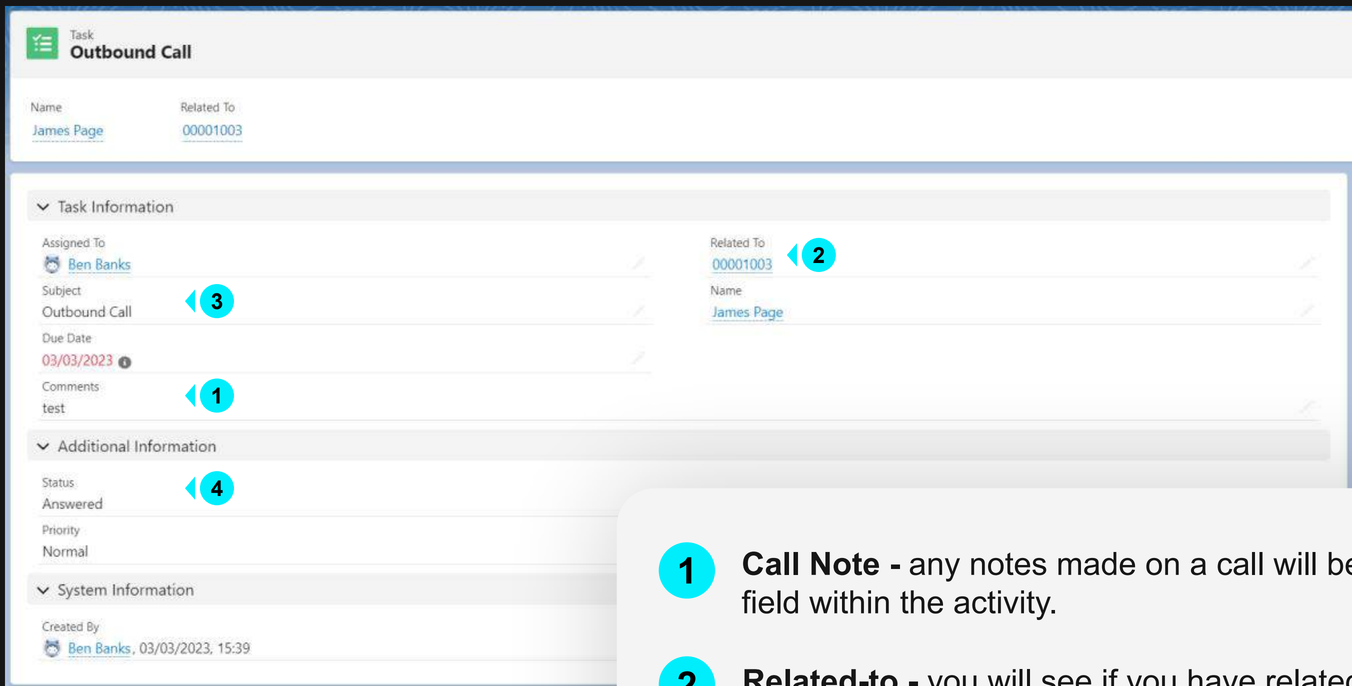
1. **Select Transfer -** Select the transfer icon to give you more options.
2. **Choose a colleague -** This is the person you are transferring the customer to.
3. **Call First -** Place customer on hold and announce them to your colleague before completing a transfer.
4. **Blind Transfer -** Send the customer straight to your colleague.

Call Control



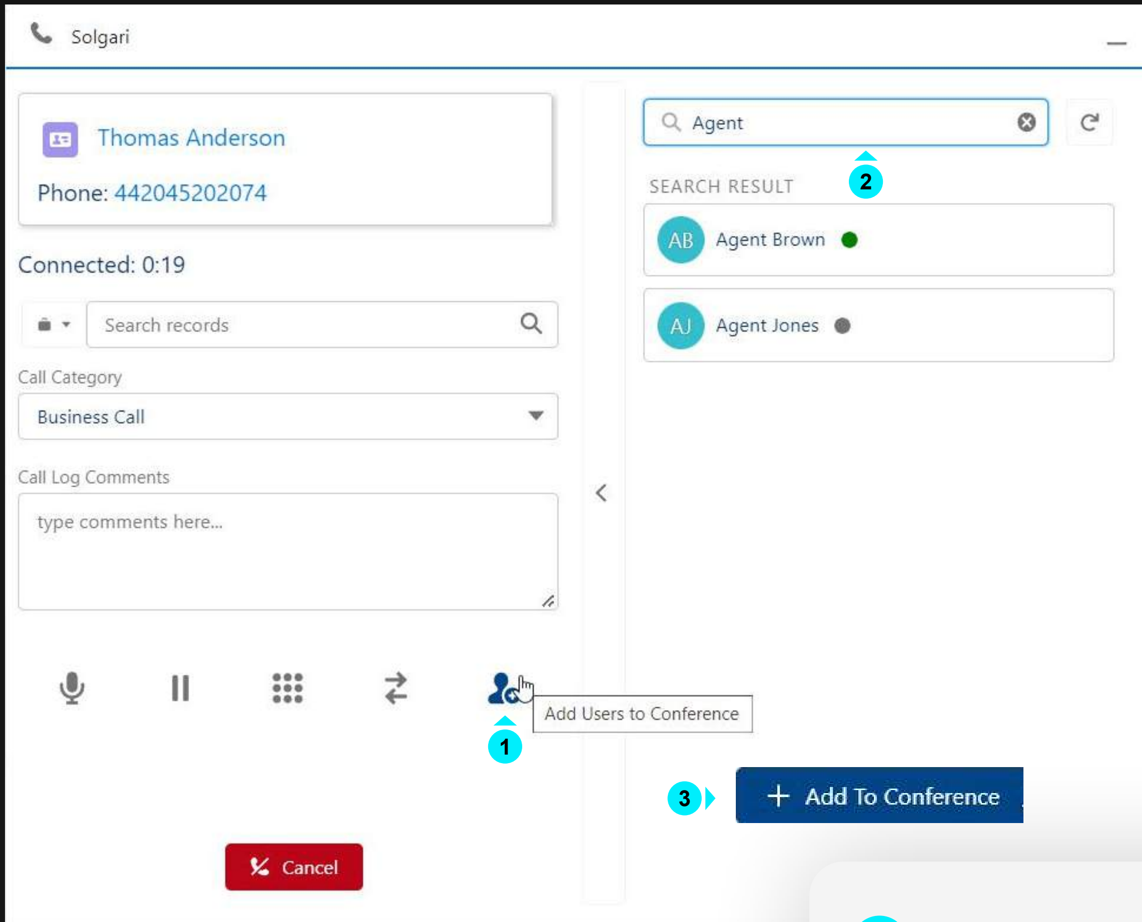
1. **Add a note -** Add a note while you're on the call and save it for future reference.
2. **Save notes -** Don't worry we save the note for you once the call is complete.
3. **Select an Entity type to relate-to –** Choose for a list of entity options in this list for example case or opportunity.
4. **Relate-to appropriate record –** Select the relevant case or opportunity to log your call notes and recording against.
5. **Add a call disposition –** choose from a list out categories or outcomes to sum up your call.

Call Control



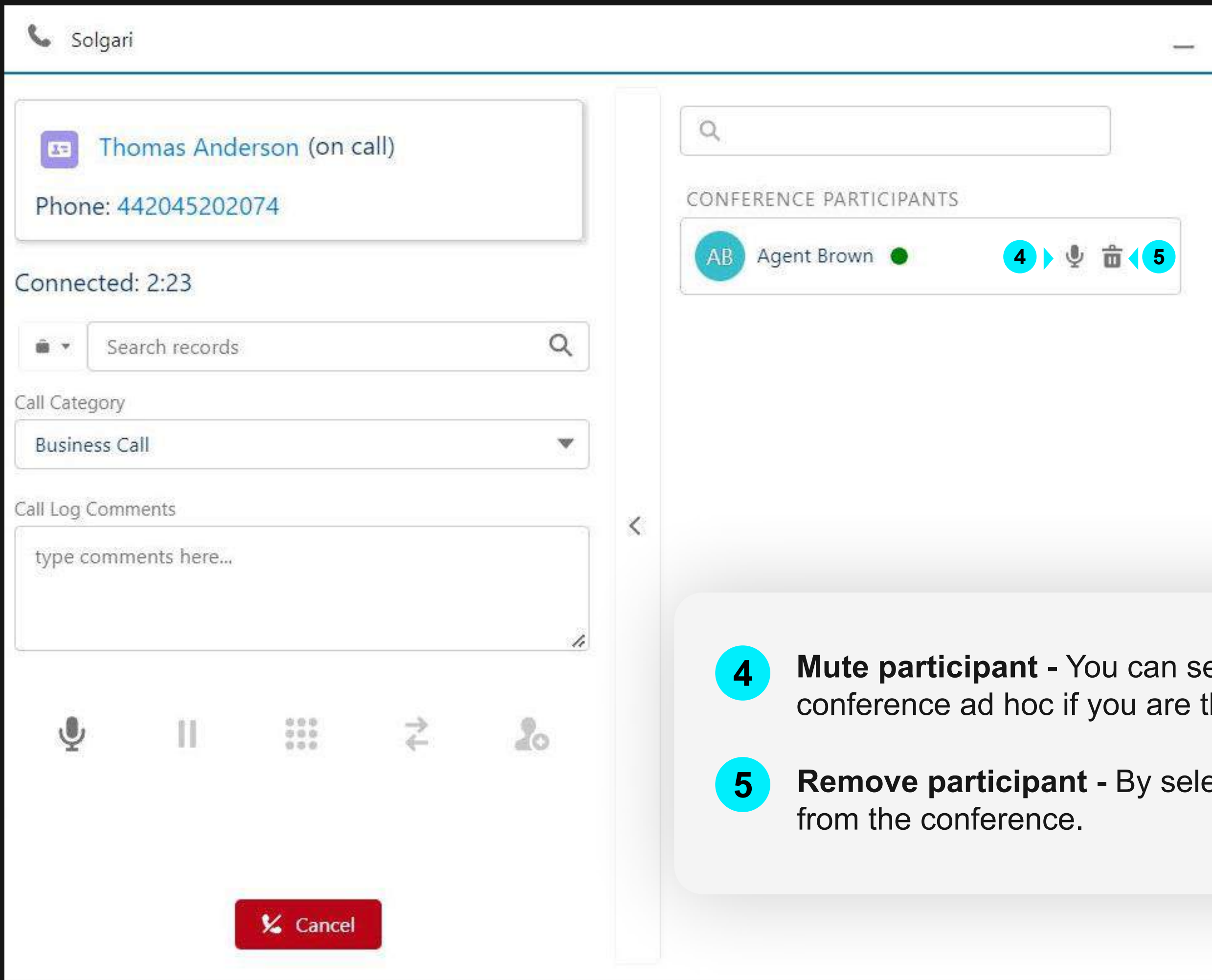
1. **Call Note -** any notes made on a call will be saved under the “Comments” field within the activity.
2. **Related-to -** you will see if you have related the call to a case or other entities in D365.
3. **Subject –** you will be able to determine the direction of call within the “Subject” field of the activity.
4. **Status –** shows an automatic outcome of the call for example Answered call, Cancelled Call, Conference Call.

Conference Call



1. **Create a conference -** Select the conference icon to search for an add colleagues to a conference call.
2. **Search for an agent -** You can search all internal contacts in your business to add to a conference call.
3. **Add to conference -** Once you have found an agent to add to the conference, please select the add icon and they will be brought into the call. You can select more then one agent to add to the conference.

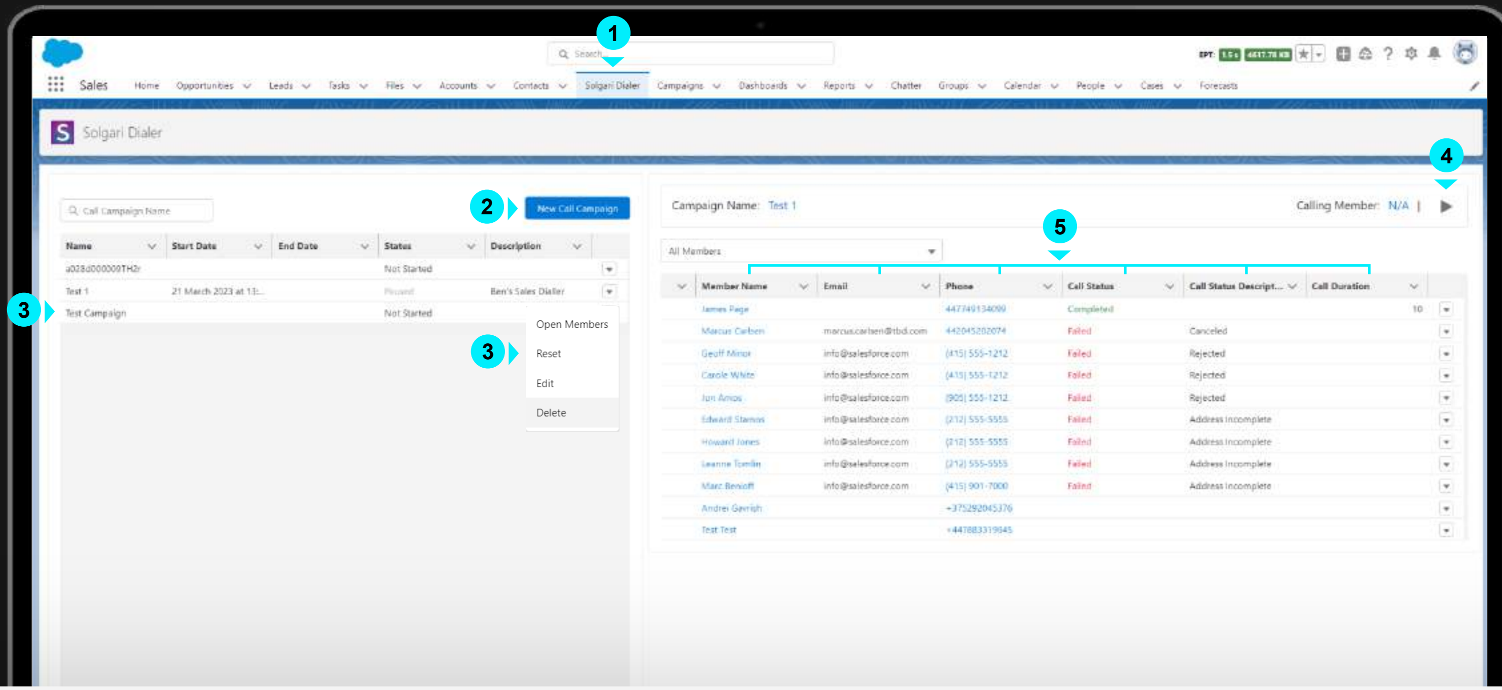
Conference Call



4 **Mute participant -** You can select mute and unmute participants in the conference ad hoc if you are the creator of the conference.

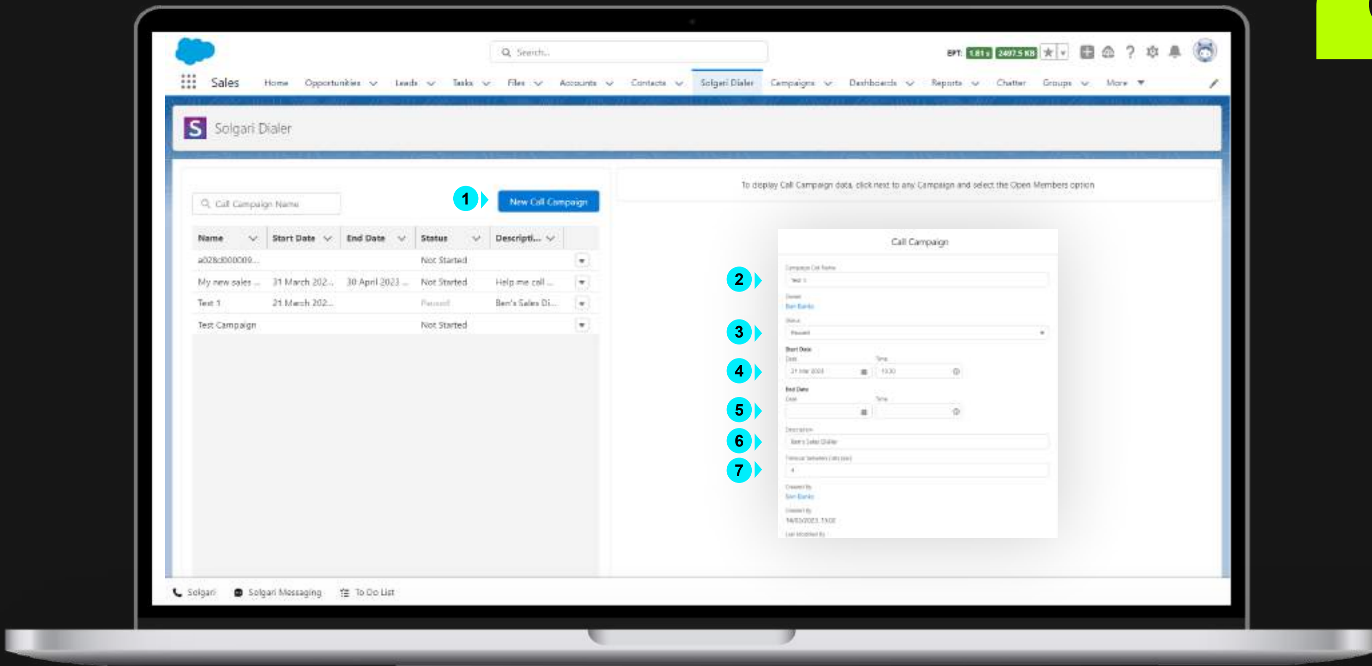
5 **Remove participant -** By selecting remove , the person will be dropped from the conference.

Outbound Voice Dialer Overview



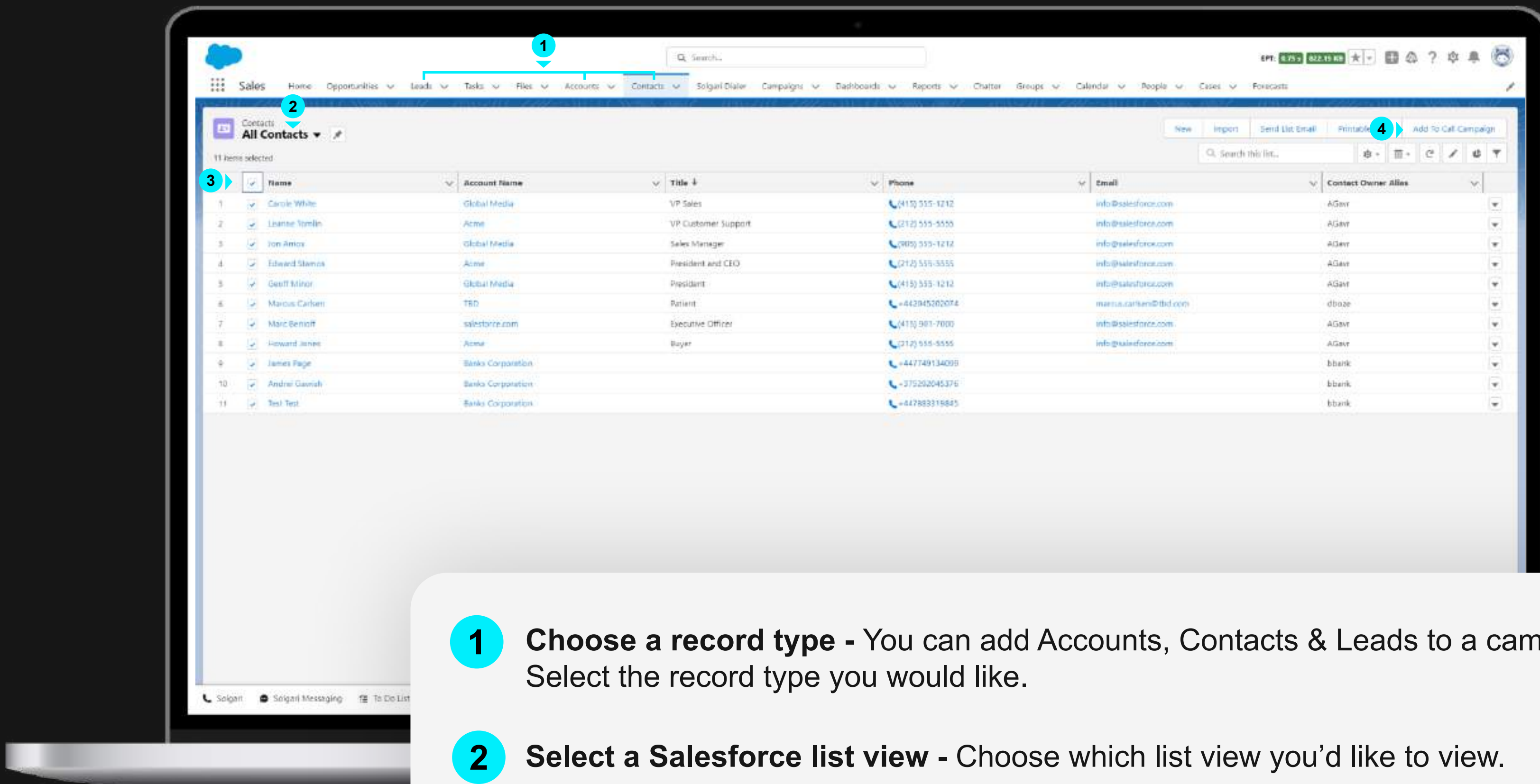
1. **Solgari Dialer -** Select “ Solgari Dialer” open the dialer window.
2. **New Call Campaign -** You can create a new campaign by select this button
3. **Existing Campaigns -** Here you will see all campaigns that you have created. You can also Open, Edit and configure members by selecting the down arrow button.
4. **Start/Stop Dialer Select the start/stop icon to begin dialing or pause dialing**
5. **Campaign Fields** - will show information about the campaign member. A campaign member can be an Account, Contact or Lead record. Some of these fields give you real time information regarding the member called.

Creating a new campaign



1. **New call campaign -** Select the “New Call Campaign” button to create a new campaign.
2. **Campaign call name -** Choose a name for you campaign.
3. **Status -** You can choose a few options under “Status” to know where you are with your campaign —“Not Started, In Progress, Completed & Paused”.
4. **Start Date -** Set when your campaign will begin.
5. **End Date -** Set when your campaign will finish.
6. **Description -** You can write a short description explaining what the campaign is for.
7. **Timeout between calls (In seconds) -** Set your own ring time between each member dialed for example once you have completed a call with a member and hang up, it will take 10 seconds before the next member of the campaign is called.

Choosing CRM records for calling



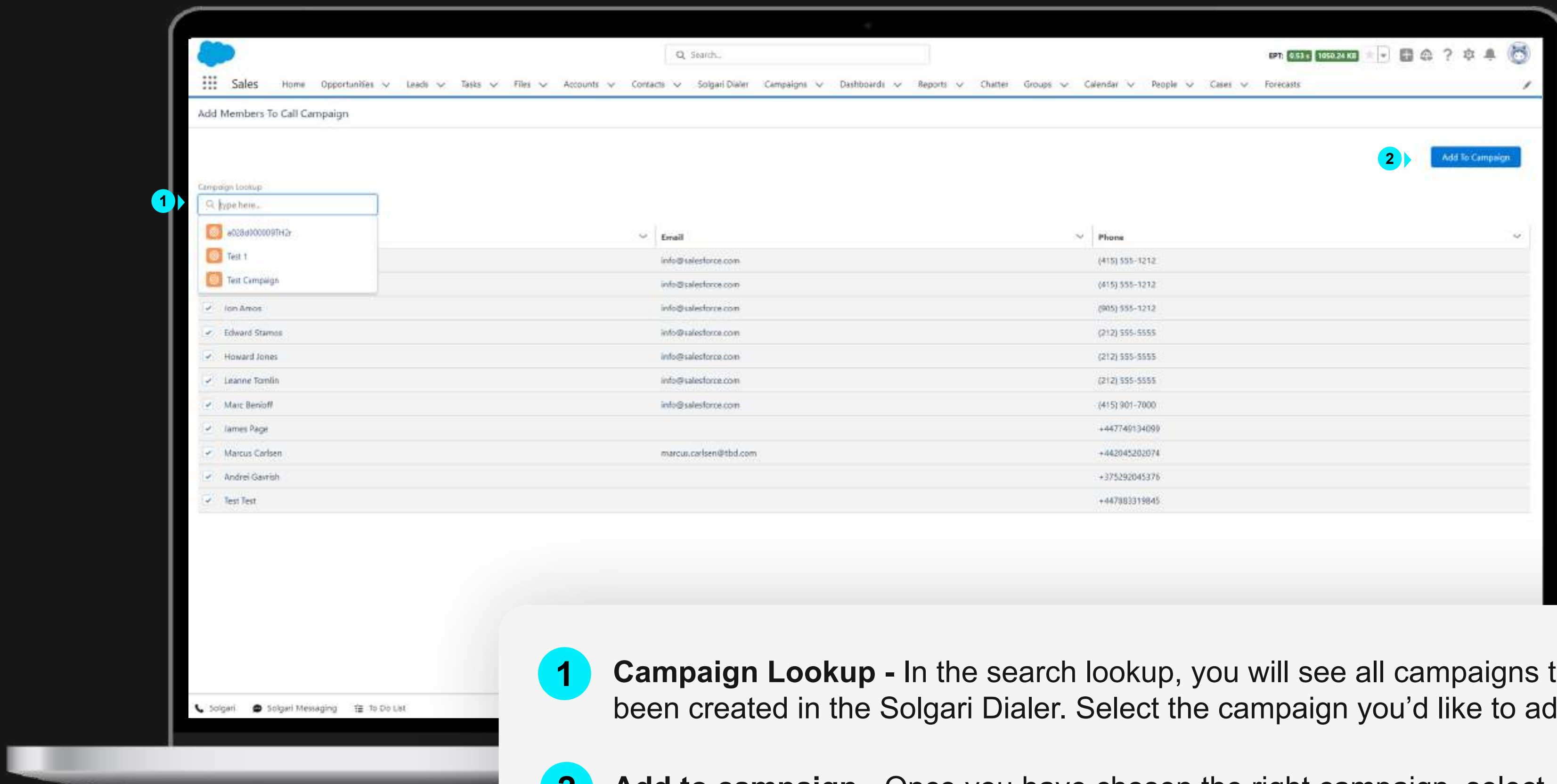
1. **Choose a record type -** You can add Accounts, Contacts & Leads to a campaign. Select the record type you would like.

2. **Select a Salesforce list view -** Choose which list view you'd like to view.

3. **Select records -** You can select all or specific records that you would like to send to a campaign.

4. **Add to campaign -** Once you have selected the records, hit the "Add To Call Campaign. This will navigate you to another screen.

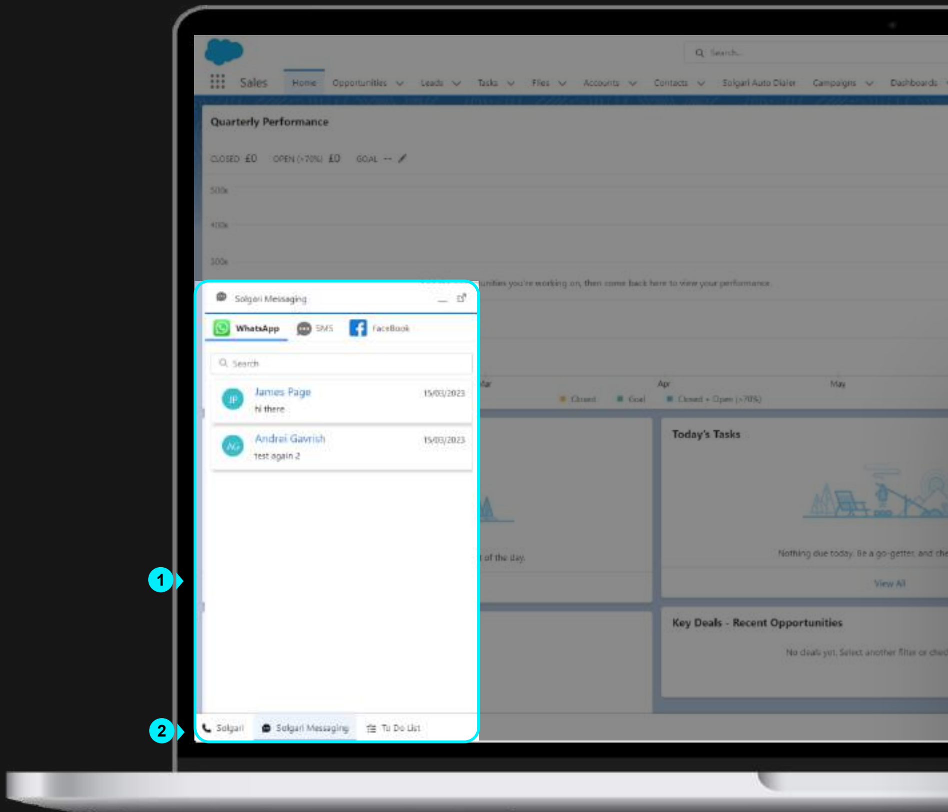
Send records to campaign



1 **Campaign Lookup -** In the search lookup, you will see all campaigns that have already been created in the Solgari Dialer. Select the campaign you'd like to add the records to.

2 **Add to campaign -** Once you have chosen the right campaign, select "Add To Campaign" button to complete the process.

Solgari Messaging Overview



1 Solgari for Salesforce (Messaging)

Solgari for Salesforce Messaging offers users the ability to send and receive text message via SMS. It also offers both WhatsApp & Facebook channels

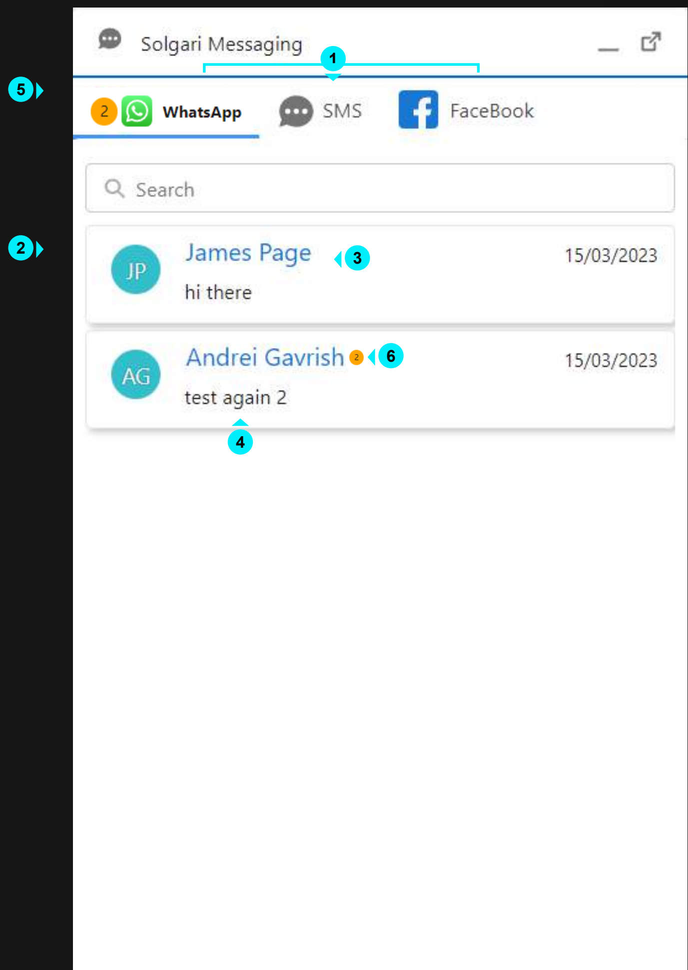
2 Salesforce Utility Bar

Solgari for Salesforce can be accessed in the utility bar.

Expand or Minimize Solgari

You can select the Solgari call icon in the utility bar to close or open it.

Messaging Channels



1 Channel Box

Each messaging channel has its own inbox. When a message has been received you will be able to select the channel to see the message.

2 Message

Select the message you would like to respond to.

3 Contact Name

Here you can see the contact's name of the person who has sent a message.

4 Message Preview

You will be able to see a small preview of the message while it sits in the inbox. Select the message to see the full conversation.

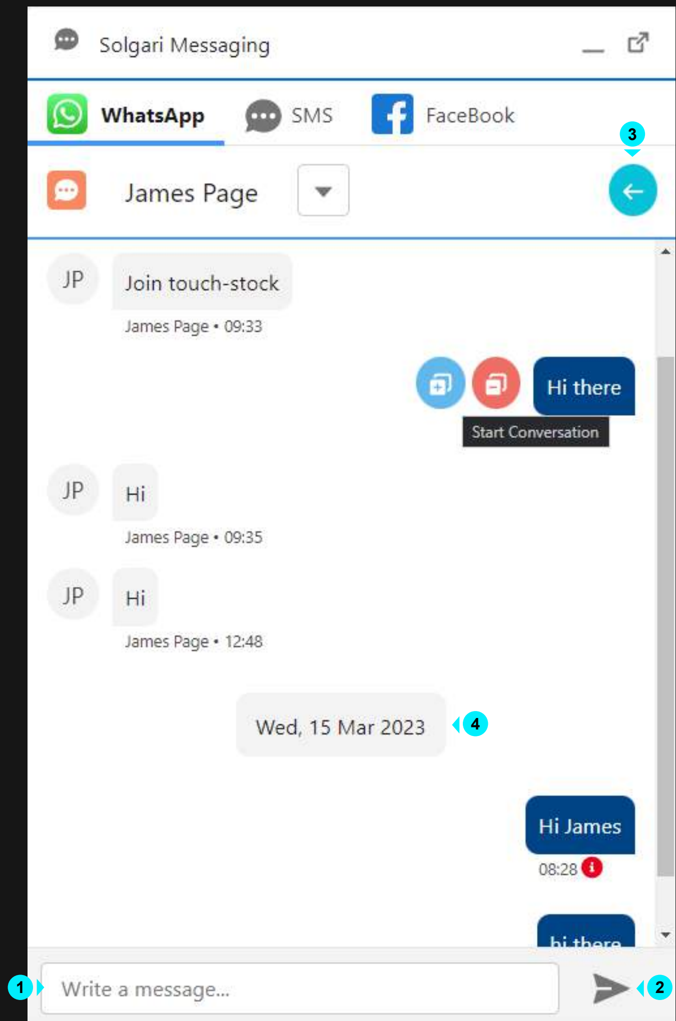
5 Inbox Notification

You will receive a notification next to each channel inbox showing number of messages received

6 Reply Notification

You will see a notification for every reply received per message, once the message is selected then the notification will disappear.

Messaging Channels



1 Type response

Here you can type your reply.

2 Send message

Select the send message icon to send your reply.

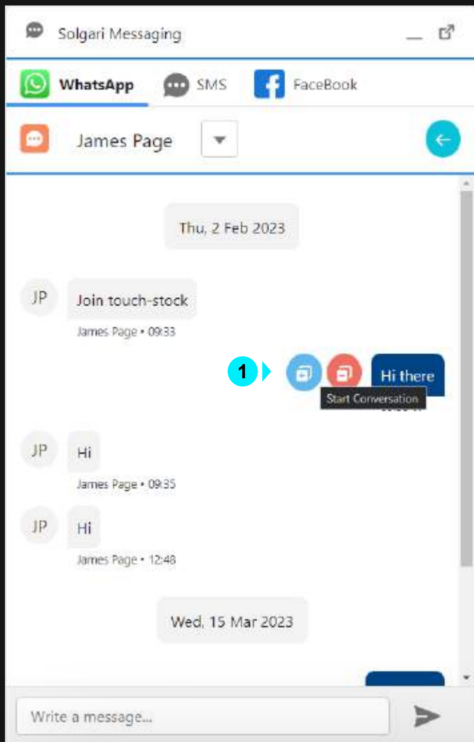
3 Back to inbox

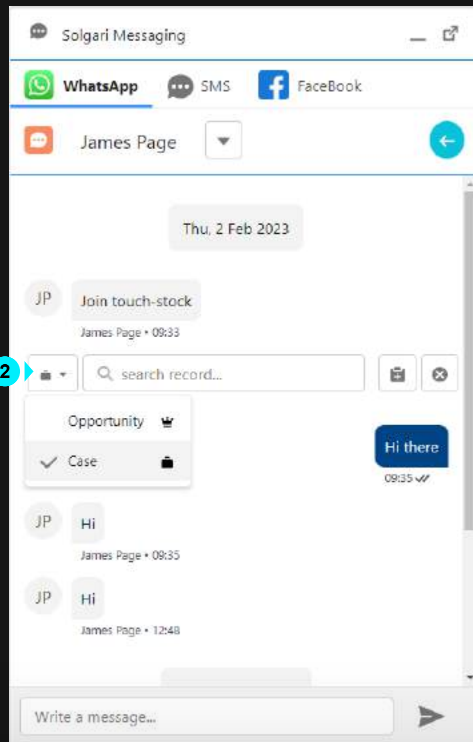
Return to inbox where all your messages for the specific channel will be held.

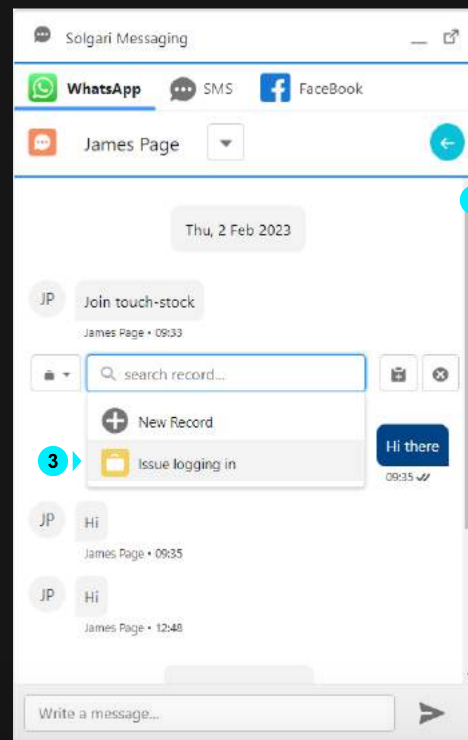
4 Message date & time stamp

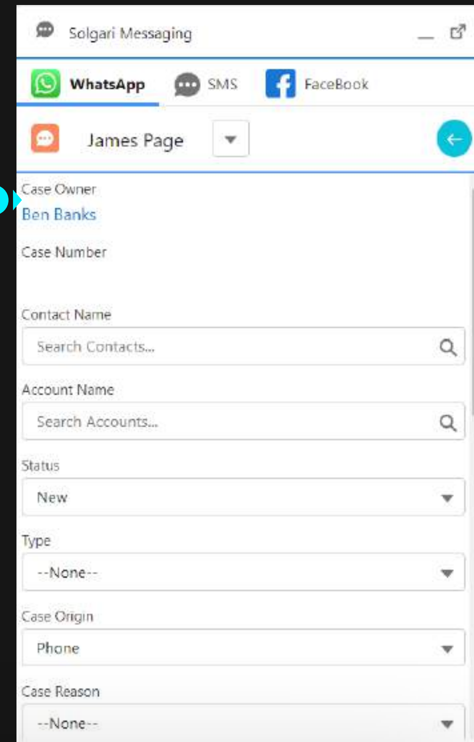
All messages will be stamped with a time and date both in the day and with each reply and response.

Relating a conversation to a case or opportunity



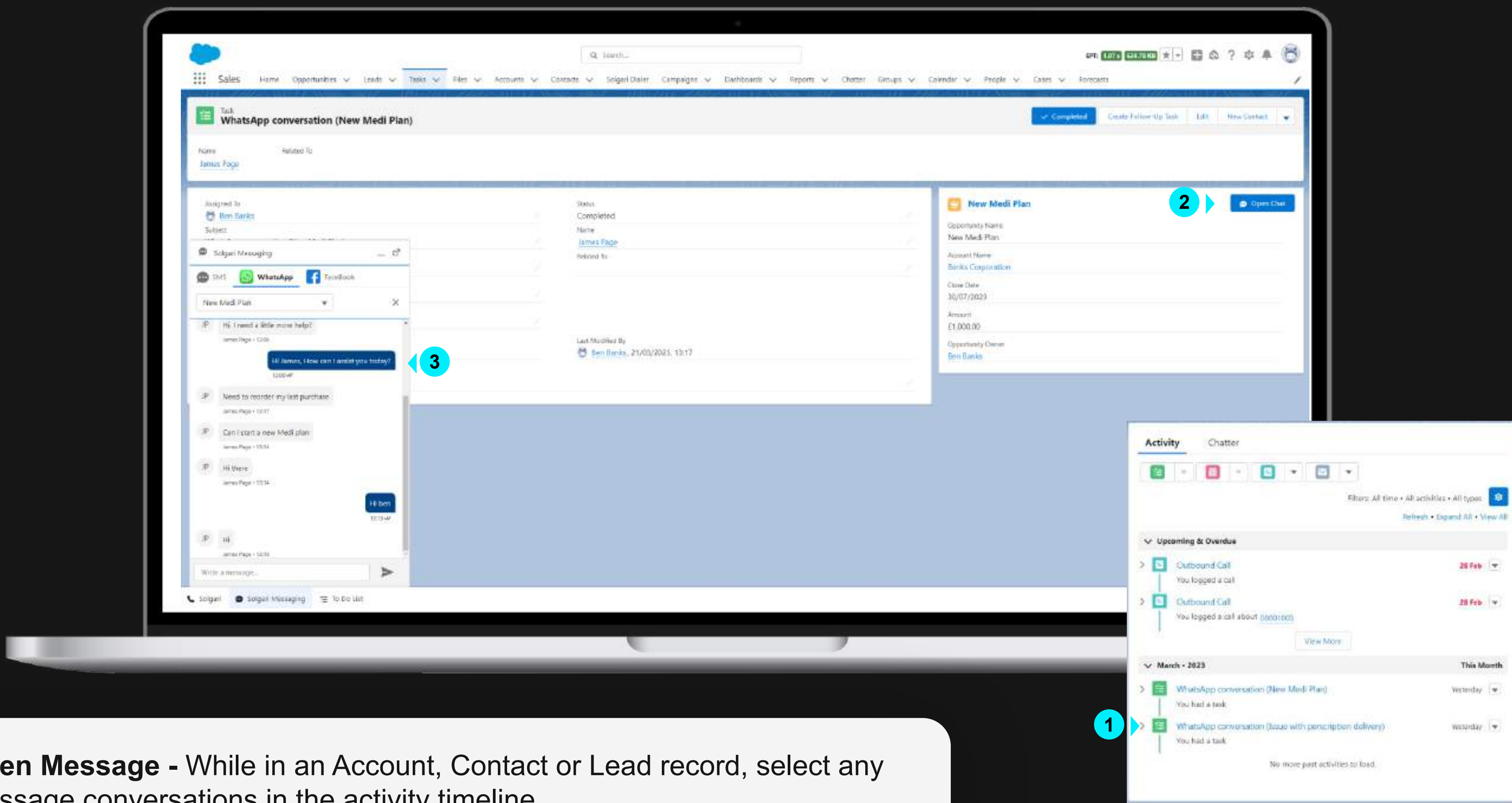






1. **Open conversation -** Hoover over specific text to bring up the Create or Assign blue icon and select.
2. **Select record type** Choose a case or opportunity to object that you'll like to create or assign to.
3. **Select existing or new record -** Choose an existing record in the list or create a new one.
4. **Create a new record** - Creating a new record has never been easier with Solgari bringing Salesforce case layouts into the interface to make the users life easier.

Accessing my related-to conversation



1. **Open Message -** While in an Account, Contact or Lead record, select any message conversations in the activity timeline.
2. **Open Chat -** Once inside the activity, select “Open Chat” to pop open Solgari Messaging.
3. **Review Message Transcript -** Once Solgari Messaging has popped up, you will be able to review the transcript of the specific conversation related to the contact and the case or opportunity.

For more information

Let's Connect