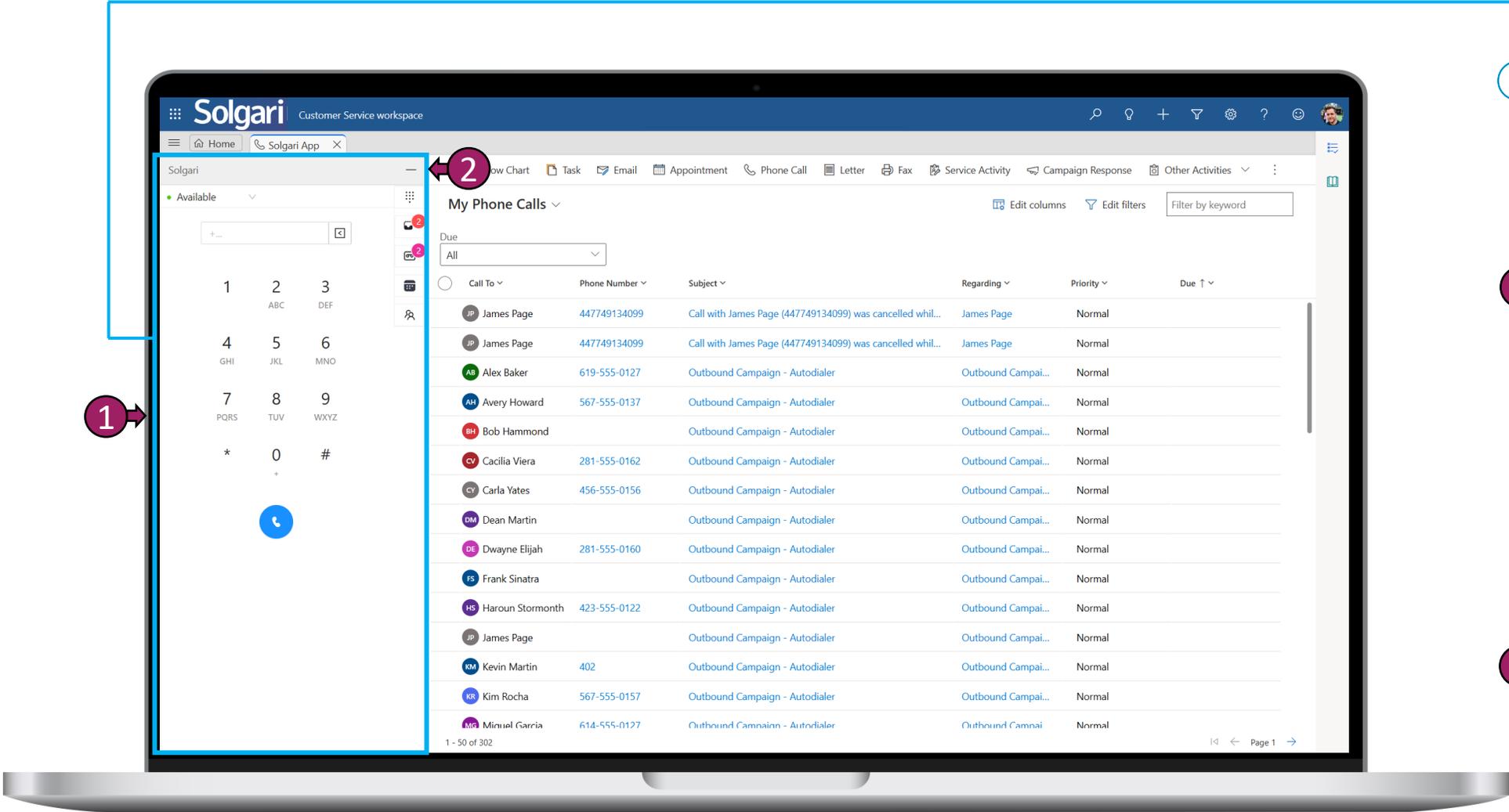


# Solgari



Microsoft  
Dynamics 365

Solgari for Microsoft Customer Service  
Workspace User Guide



## Microsoft Channel Integration Framework 2.0

Solgari for Customer Service Workspace can be installed via Channel Integration Framework 2.0



## Solgari for Customer Service Workspace

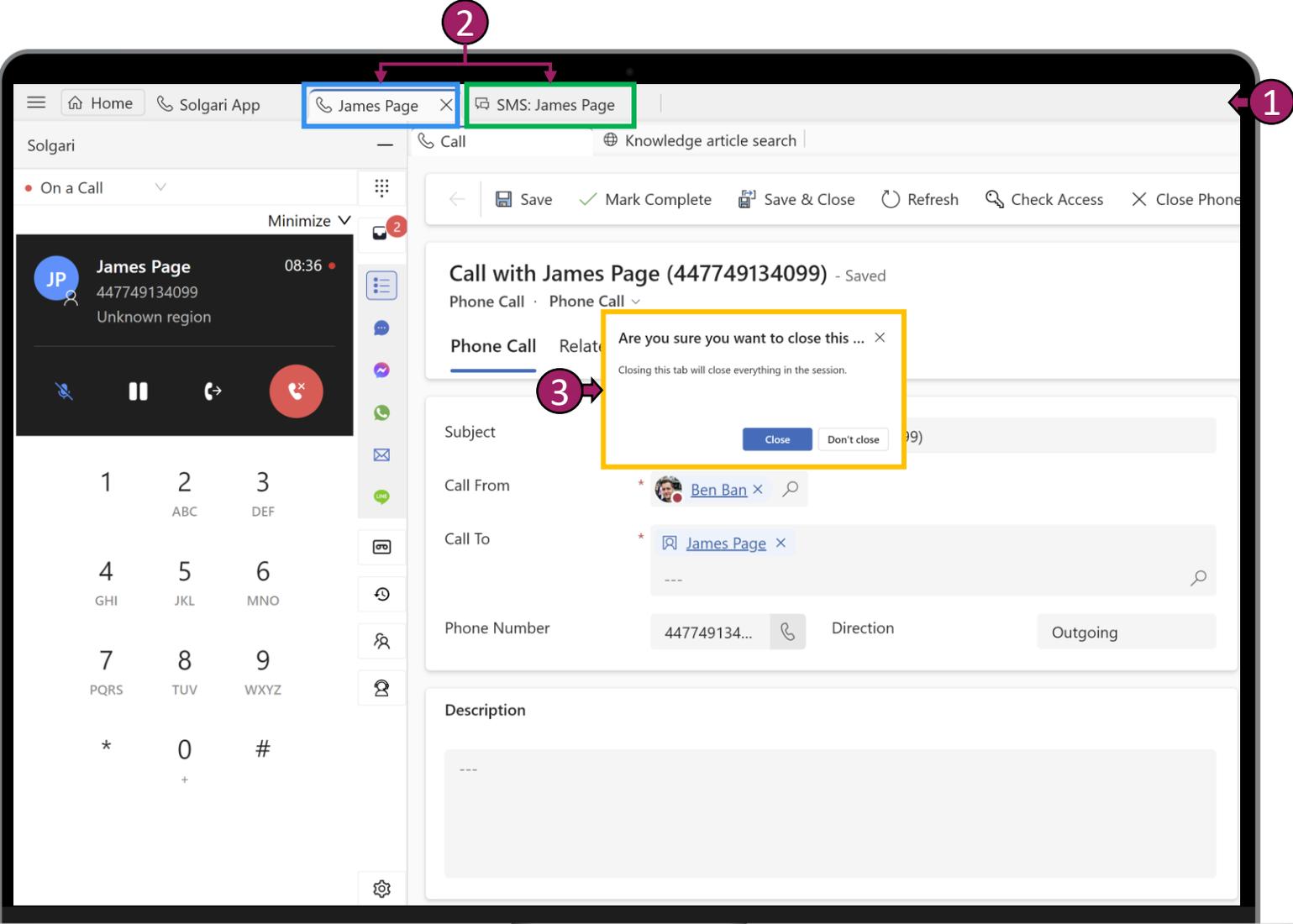
Solgari for Customer Service Workspace is your hub to all customer communications with this be making and receiving calls, sending outbound emails or texts and handling inbound conversations via channels such as WhatsApp for Business, Facebook, Web Chat, Live Chat, Email, SMS.



Expand or Minimize Side Bar Solgari for Customer Service Workspace can be expanded to show the full UI like in the image to your left, but it can also be minimized when you're not using it into a short menu at the lower left part of your screen.



# Multi-Session Communications



## 1 Multi-Session Bar

Agents will see multiple session of customers building up on the multi-sessions tab here.

## 2 Customer Tab

Each tab represent a customer you are speaking with. You will also see the channel in which the customer has chosen to speak with your business I,e, Voice, SMS or WhatsApp.

## 3 Closing a session

You need to complete the log of you activates after your call or chat with the customer is finished. Remember to hit "Save & Close" to complete this session and to close it down.

# Voice Sessions

## 1 Voice Session

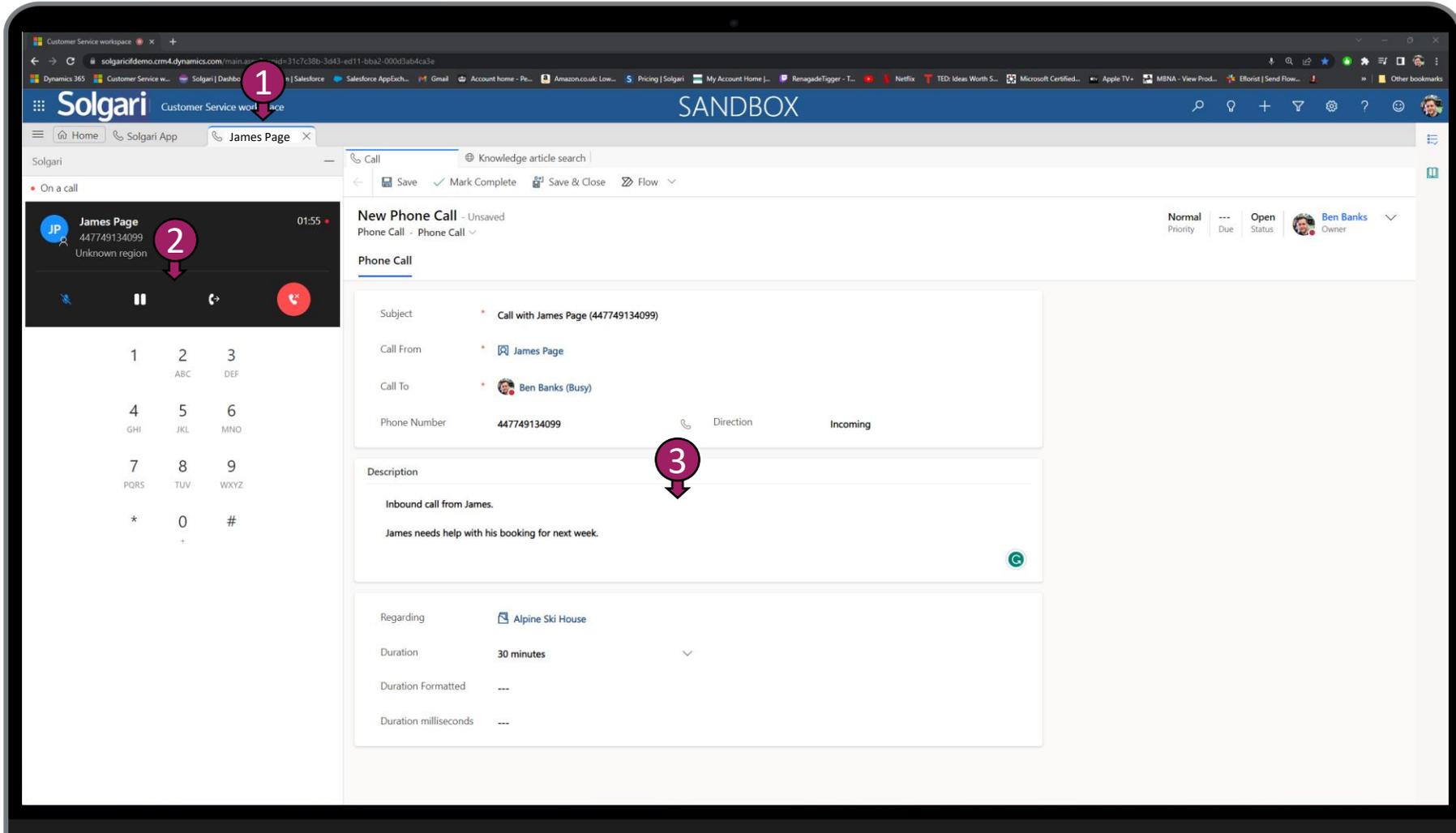
This shows the customer you are talking with the session you are in.

## 2 Call Control

Your phone is within the Solgari UI here. You can use all the same features as you would a handset.

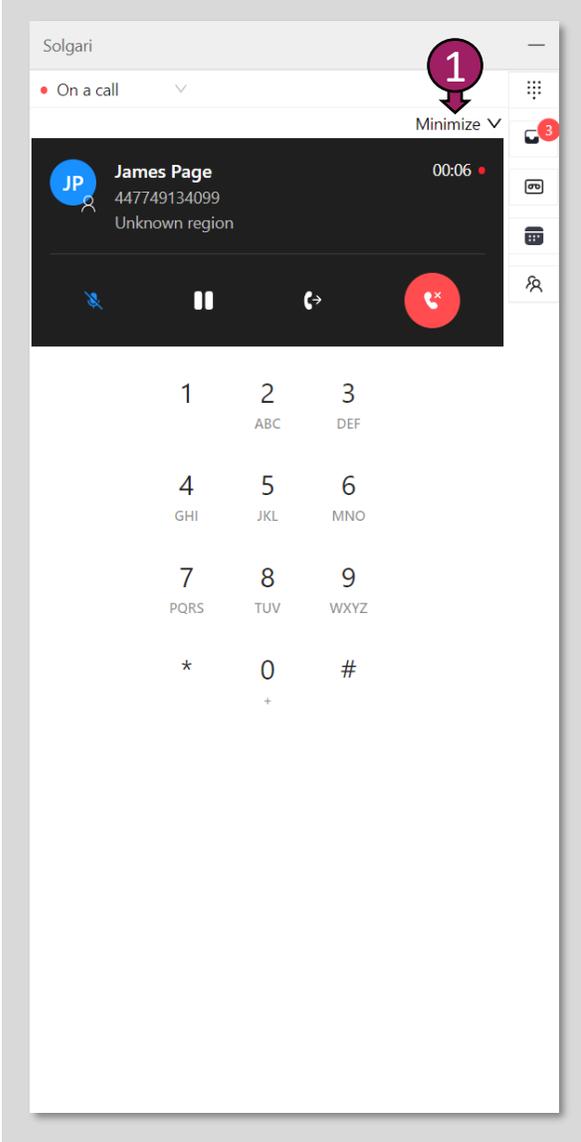
## 3 Log a call

Save notes or access customer records, cases, opportunities and more while on a call.



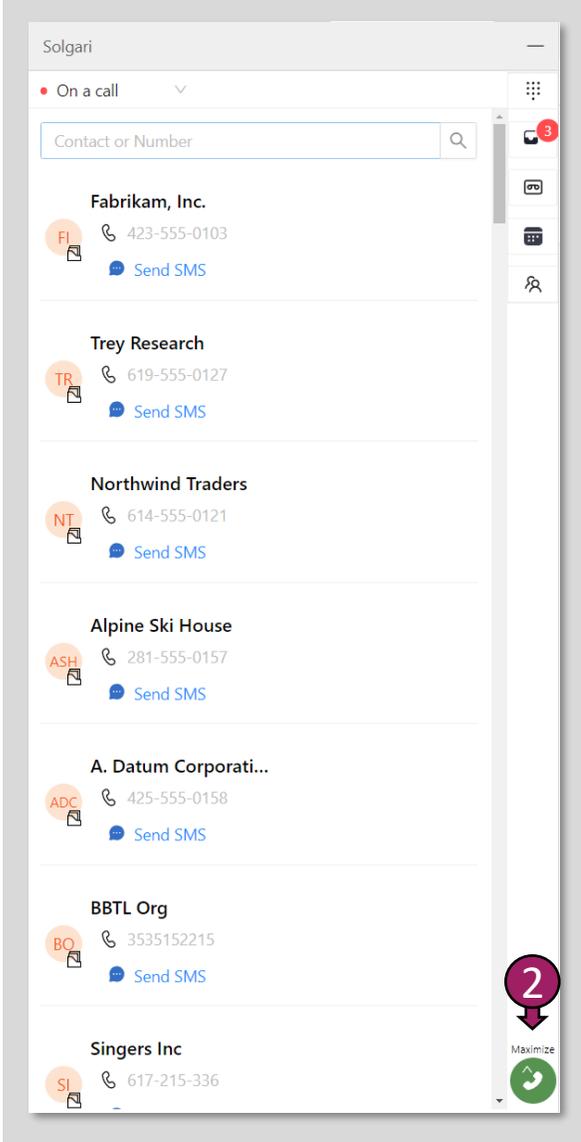
# Minimize & Maximize Call Control

## Minimize



**1 Minimize**  
Select minimize while on a live call. This gives you the ability to navigate around the Solgari UI i.e., History or CRM Records.

## Maximize



**2 Maximize**  
Select the green phone icon to go back to your live call session and call control.

# Chat Sessions

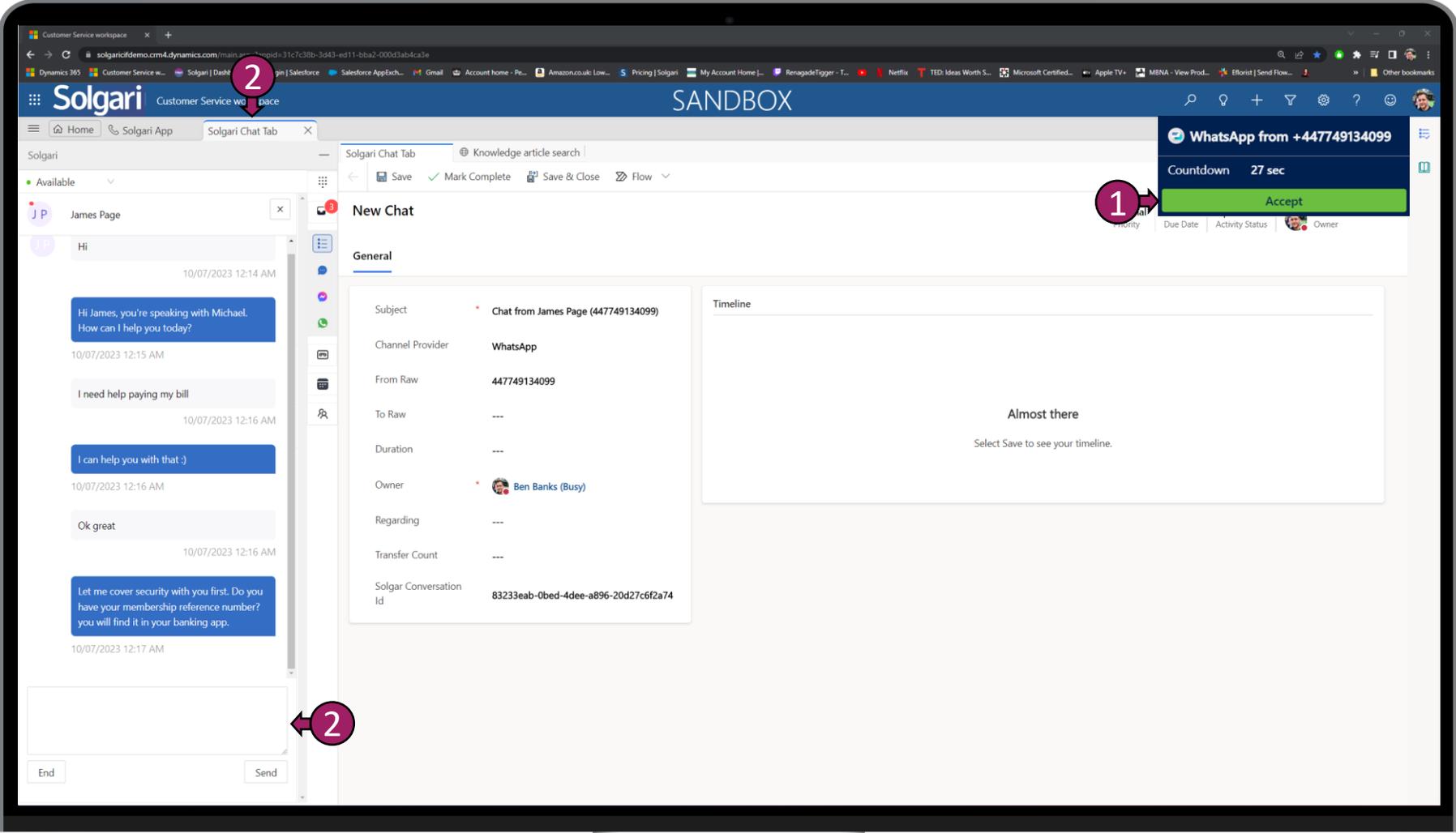
## 1 Chat Notifications

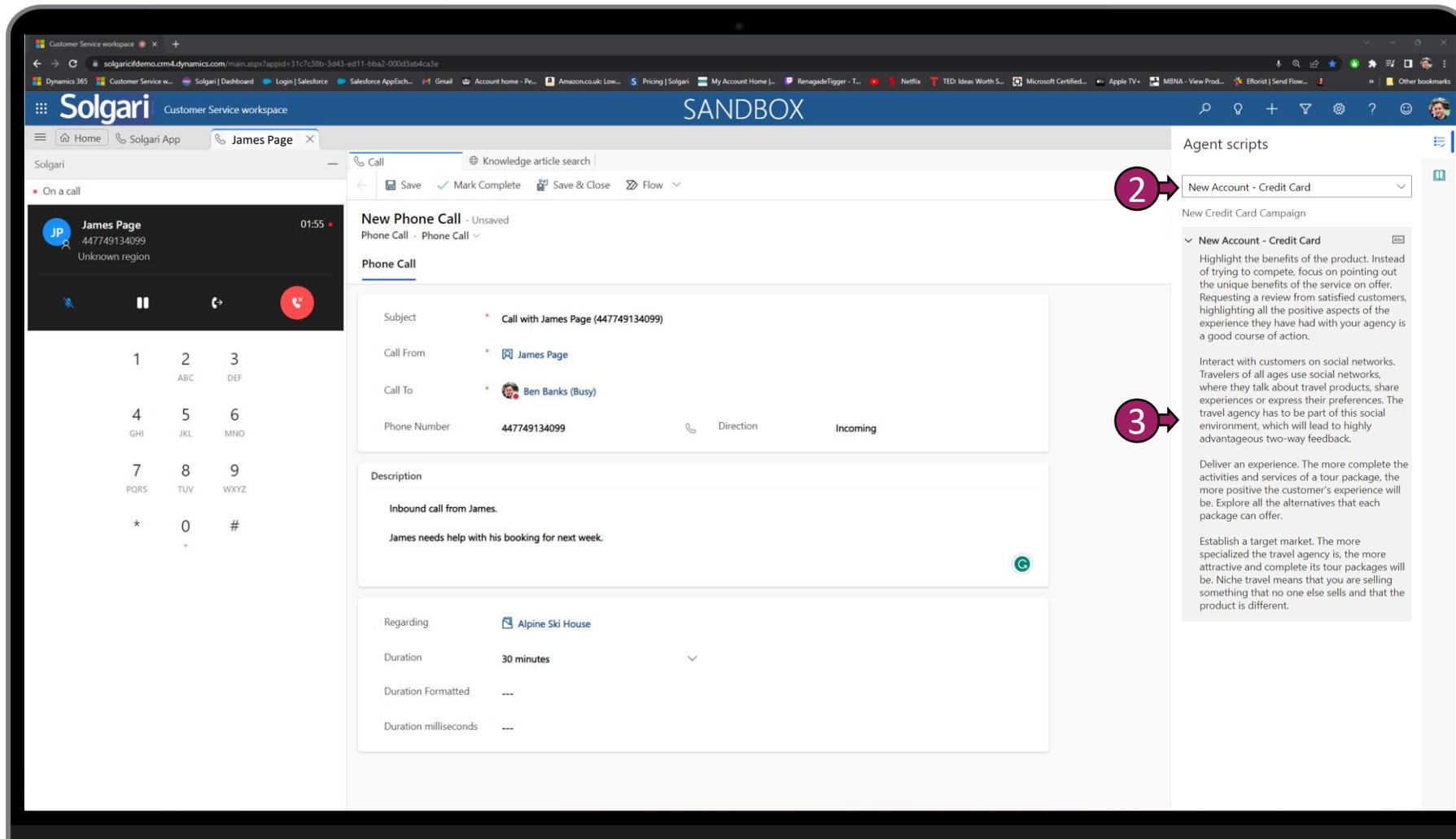
Once a chat conversation and customer has been matched to you will have a small window to accept the message.

## 2 Chat Session

Easily respond to your customer within a chat session while accessing knowledge and information to help your customer..

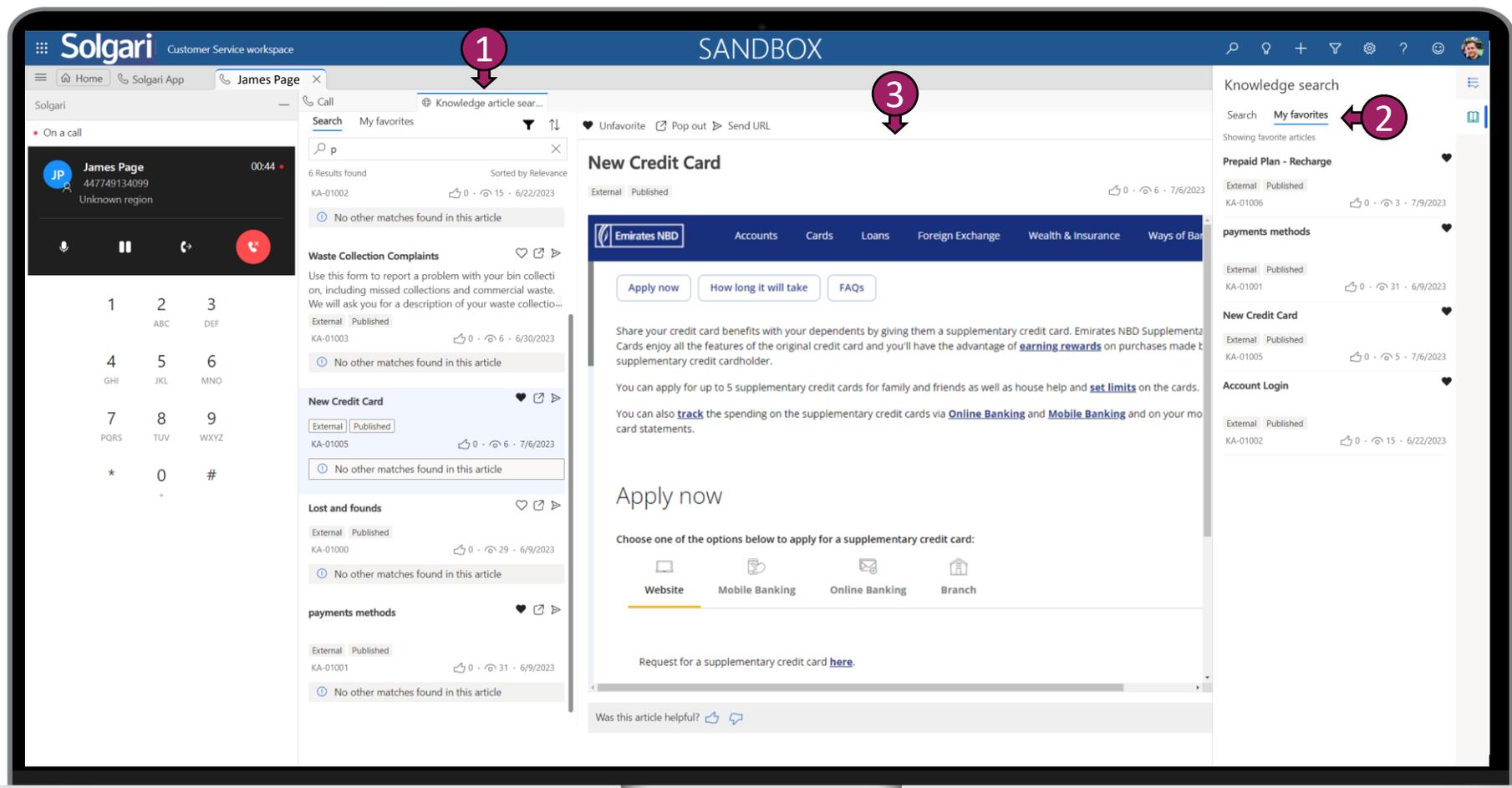
See page 7 for more information on handling a conversation.





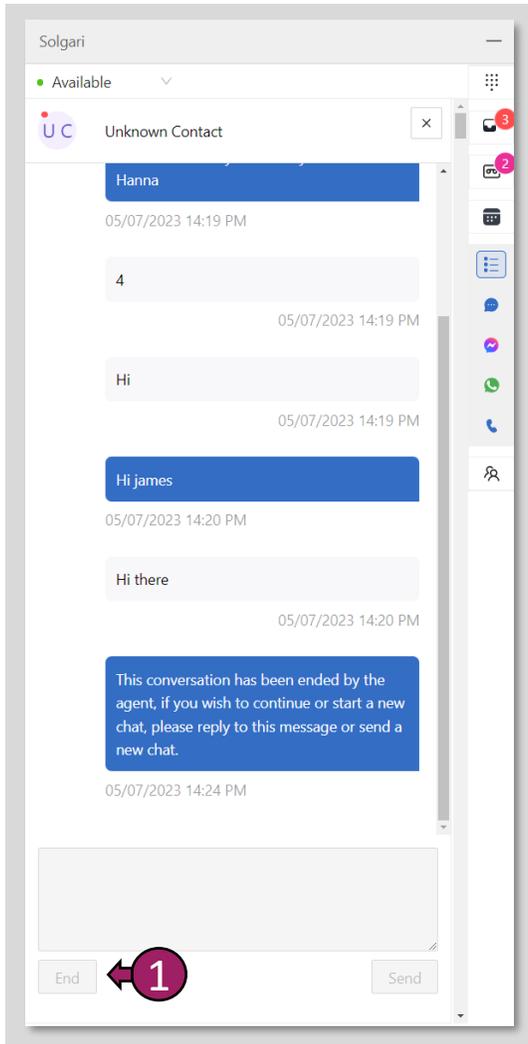
- 1 Agent Scripts**  
Create your own agent scripts within Customer Service Workspace.  
Agents can follow these scripts on a call or while responding to a message.
- 2 Script List**  
Select the correct script that has been assigned to you from the list.
- 3 Script**  
Currently open script.

# Knowledge Search & Articles



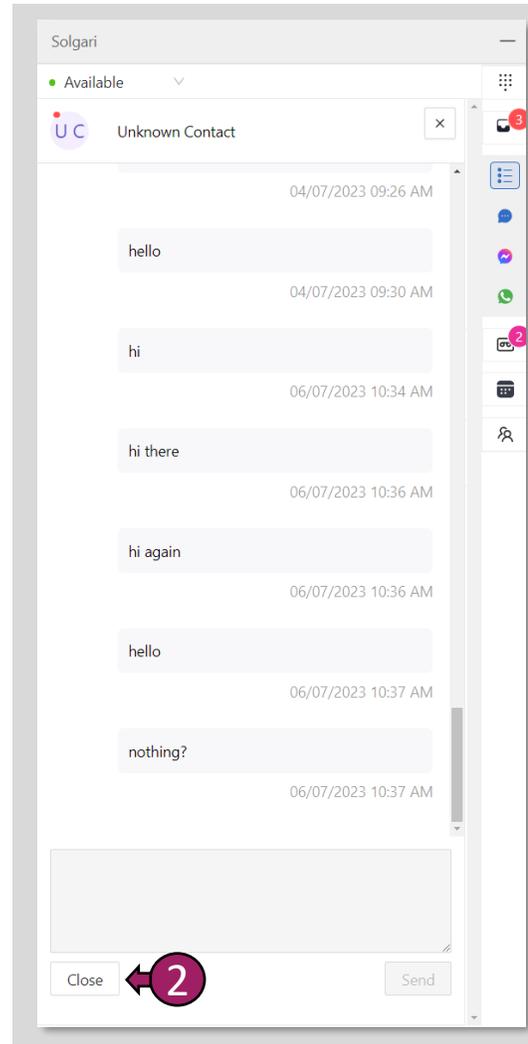
- 1 Knowledge Search**  
Knowledge search allows you to find articles and information that can assist you in helping your customer per session.
- 2 My Favorites**  
You can also access your favorite articles that you've bookmarked.
- 3 Article**  
Articles can be simple text or images and URLs to specific websites like banking or booking sites.

# Ending and closing your conversation



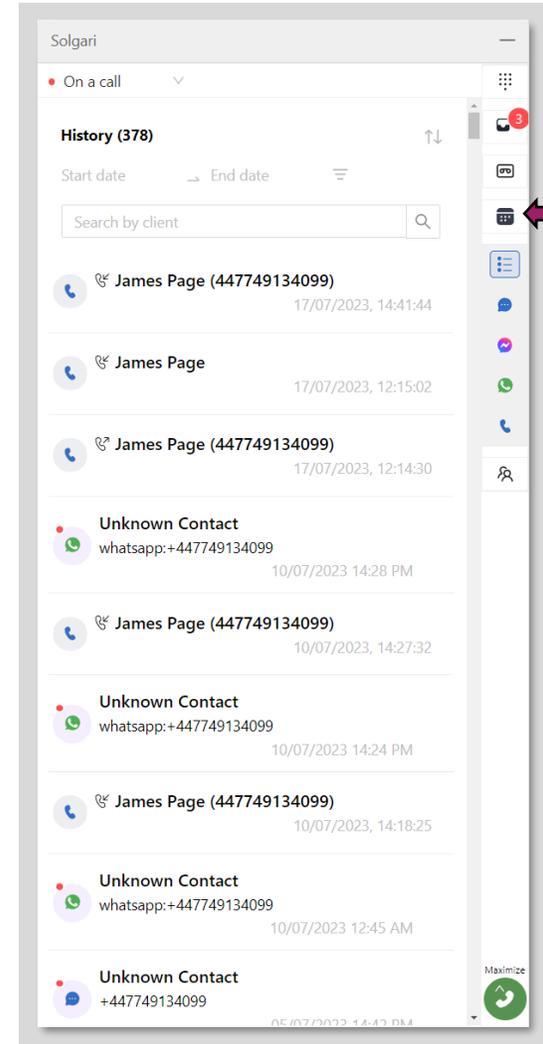
## 1 End Conversation

Select the “End” button to finish your conversation. Your customer will receive a message stating the conversation has now ended.



## 2 Close Conversation

Once you have completed your message, please then select “Close” to remove it from your inbox. The transcription will move to history automatically.

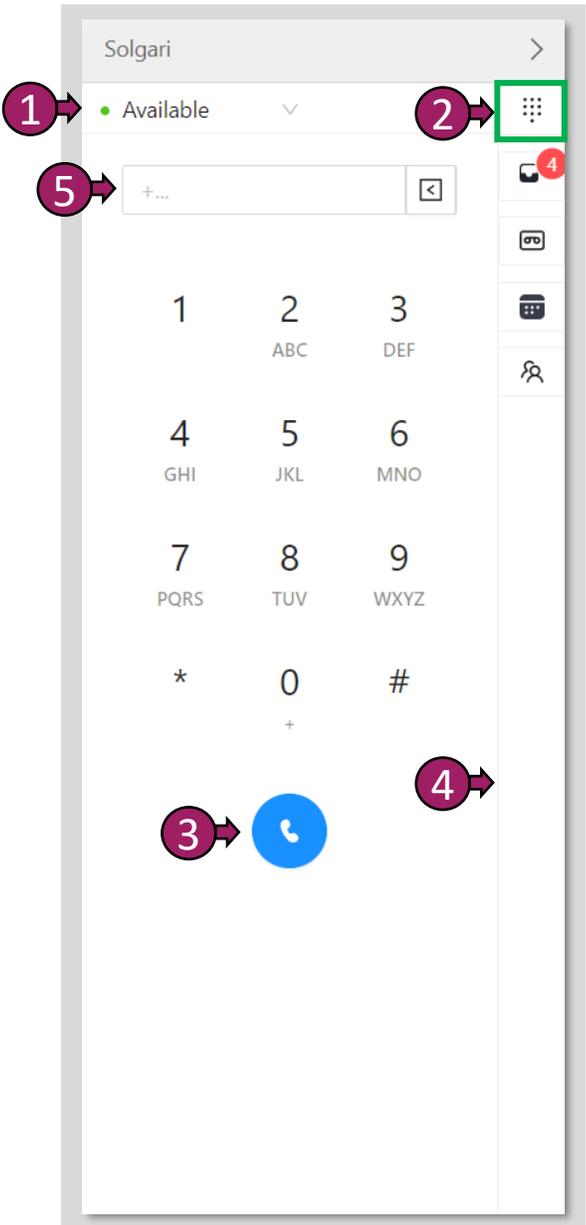


## 3 History

See all closed conversations and past call logs in your history. Once an entry is selected, more information will be shown in Customer Service Workspace for that specific activity.

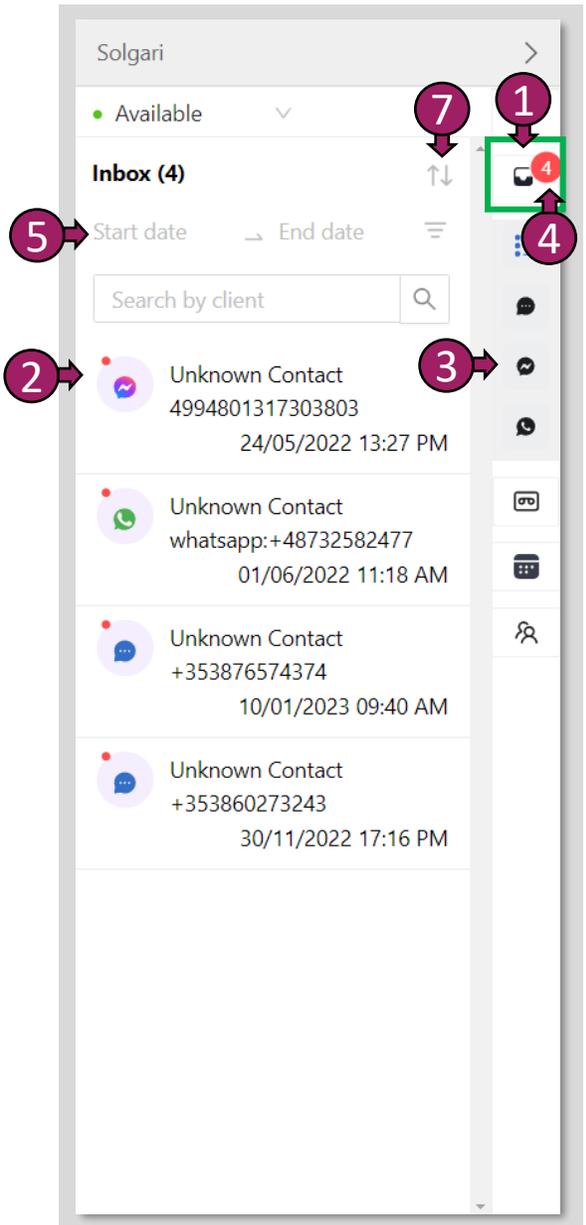
# Overview

## 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.

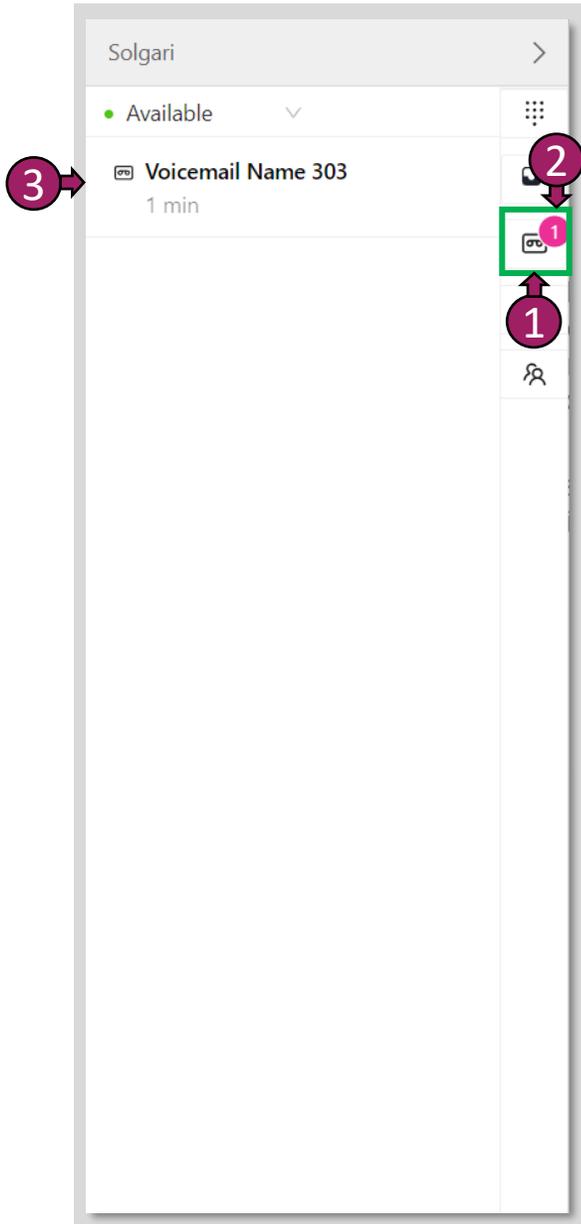
## Inbox



- 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)

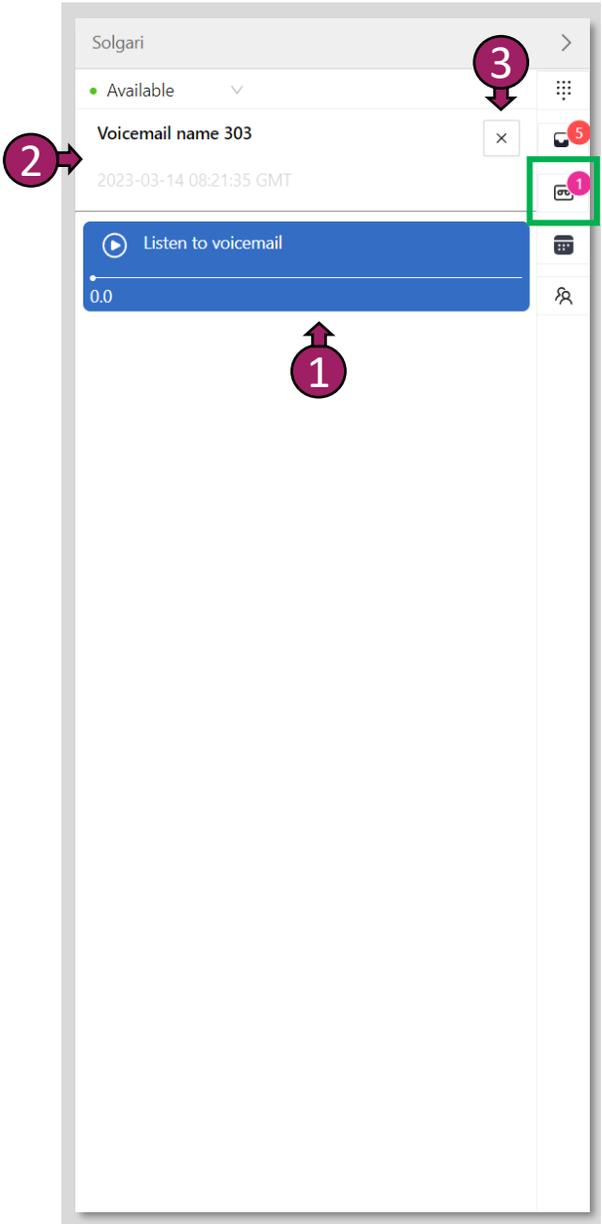
# Overview Continued

## 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.

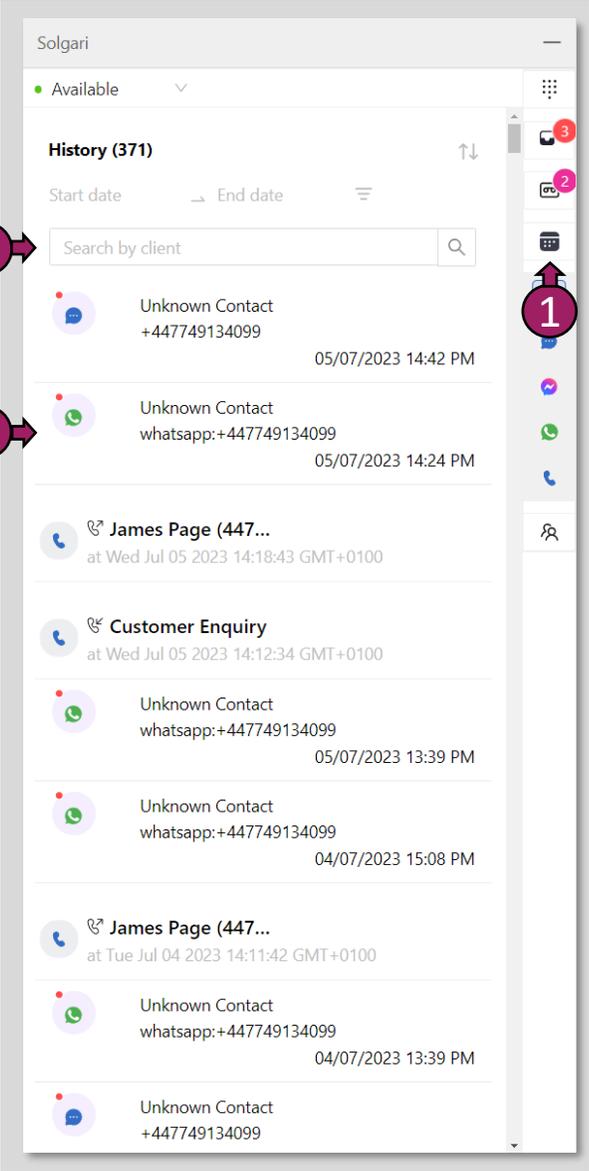
## Voicemail Message



- 1 Play Voicemail**  
Press the play icon to listen to your voicemail message.
- 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.

# Overview Continued

## History

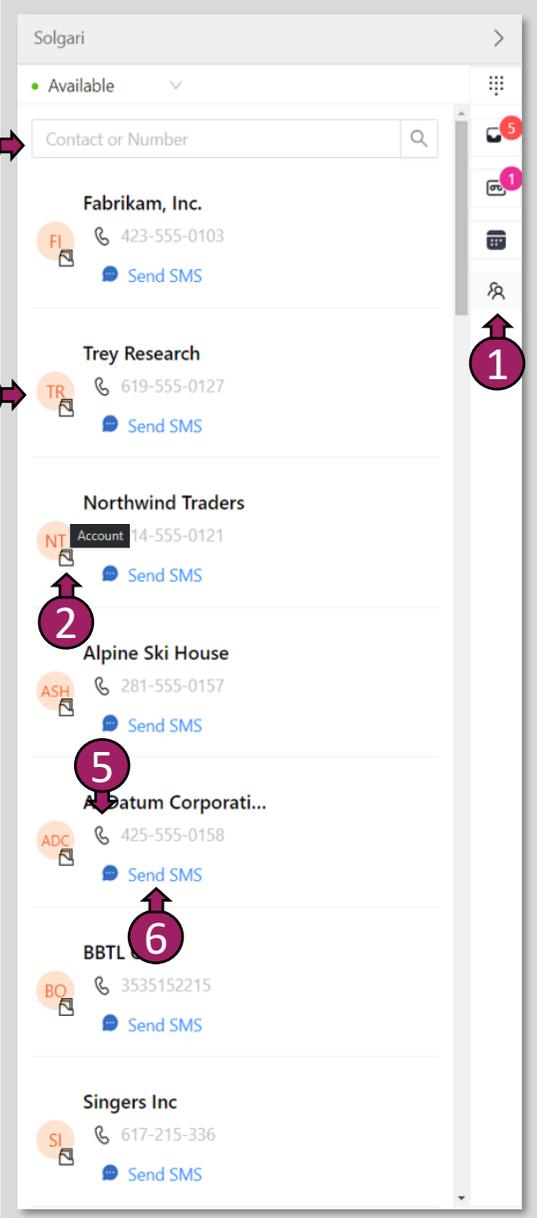


**1 Recent Channel Activates**  
Select recent channel activities to see all previous voice conversations and message transcripts.

**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**  
Hoover 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

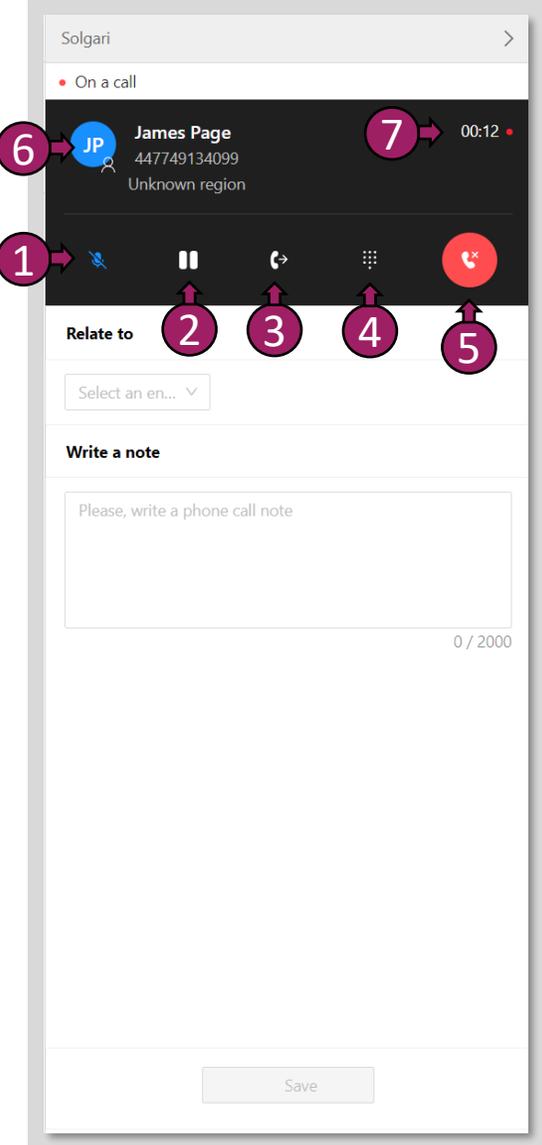
**4 Search CRM Records**  
You can search for an Account, Contact or Lead by typing the name or number here.

**5 Click-to-Call**  
Select number to make a call.

**6 Click-to-text**  
Select "Send SMS" to start a text message.

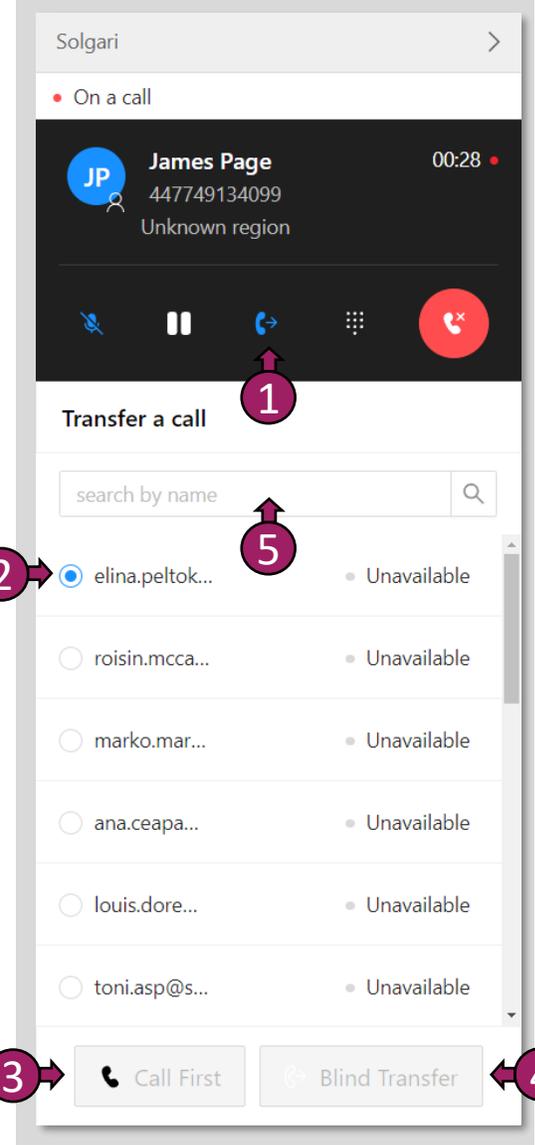
# Call Control

## 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.



# Solgari Copilot – Conversational Summary & Overall Sentiment



## Solgari Copilot for Microsoft Customer Service Workspace

**1** Call with James Page (447749134099) - Unsaved

Phone Call - Phone Call

Normal Priority, Open Status, Ben Banks Owner

Subject: Call with James Page (447749134099)

Call From: Ben Banks (Busy)

Call To: James Page

Phone Number: 447749134099, Direction: Outgoing

Description: I called James to check how he is getting on today.

Regarding: James Page

Call Type: Regular

Duration: 1 minute

Duration Formatted: 00:37

Duration milliseconds: 37,000

Transcript: Hi James, it's Ben here. How are you? Not too bad. Thanks very much. How are you doing, Ben? Help me help you with that.

Summary: The source document is a brief conversation between two individuals, Ben and James. Ben initiates the conversation by asking James about his well-being. James responds positively, expressing his gratitude.

Sentiment: 0.76 (Green), 0.19 (Yellow), 0.05 (Red)

- 1** Solgari Copilot – Displays important and relevant details about the voice call or message conversation between an agent and the customer.
- 2** Description – Displays the call notes taken during the conversation.
- 3** Transcript – A voice transcript is captured during the call along with the voice recording.
- 4** Summary - Solgari Copilot uses AI to review the entire conversation and pull-out key points within the call that matter, giving the agent a well-rounded synopsis of the conversation.
- 5** Sentiment Grading – A breakdown of the different sentiments captured during the call by %.

# Solgari

Please contact support for further details

[supportticket@solgari.com](mailto:supportticket@solgari.com)