

# Solgari



Microsoft  
Dynamics 365

Solgari for Dynamics 365 User Guide

## Overview

- Solgari for D365
- Expand or Minimise Side Bar
  
- Status
- Dial Pad
- Dial Button
- Side Bar
- Enter a Phone Number
  
- Inbox
- Message in the Inbox
- Filter by Channel
- Inbox Notifications
- Filter by Date
- Filter by Channel
- Sort by Newest or Oldest
  
- Voicemail Inbox
- Voicemail Notifications
- Voicemail Message

- Play Voicemail
- Voicemail Message Detail
- Close Voicemail Message
  
- Recent Channel Activities
- Activity Entry
- Search Activity Entries
  
- CRM Records
- Record Type
- Open CRM Record in Dynamics365
- Search CRM Records
- Click-to-Call
- Click-to-Text

## Call Activities

- Answer
- Decline/Reject/Terminate
- Open a CRM Record
- Contact Information
  
- Call Control
- Mute
- On-Hold
- Transfer
- Dial Pad
- Hang-up
- Open CRM Record
- Call Duration
  
- Select Transfer
- Choose a Colleague
- Call First
- Blind Transfer
- Search for an Agent
  
- Minimise/Maximise Solgari

- In-Call Activity Options
- Notes
- Relate to
- Create a New Record
- Assign to
- Follow-up Task

## Message Activities

- Respond to messages
- Open Inbox
- Select Message
- Type your Response
- Send Message
  
- Message Blind Transfer
- Start a Transfer
- Select Agent and Blind
- Transfer a Message

## Outbound Progressive Dialler

- Creating a Campaign
- Campaigns
- New Campaign
- Campaign Details
- Save Campaign

- Creating a Marketing List
- Marketing List
- Create a New Marketing List
- Marketing List Name
- Save the New Marketing List

- Adding Members to a Marketing List
- Add Members
- Search Members
- Select Records
- Add a Record
- Added Records

- Assigning a Marketing List to a Campaign
- Campaigns
- Marketing List Settings
- Add Existing Marketing List
- Search Marketing Lists
- Assign Lists
- Add Marketing List

- Preparing to dial
- Select Marketing List
- Select Settings
- Wrap-up Time Settings
- Save Changes
- Number of Contacts

- Start Campaign
- Pause & Resume a Campaign
- Cancel a Campaign
- Wrap-up Time
- Remaining Records
- Create an Activity
- Check Campaign
- Member Status

- Activity Reports
- Select My Phone Calls
- Edit Columns
- Add Duration Formatted

## Additional Features

- Conversation Summary & Sentiment
- Solgari Copilot
- Description
- Transcript
- Summary
- Sentiment Grading

- Live Voice Translation
- Real-time Voice Translation
- Time Stamp

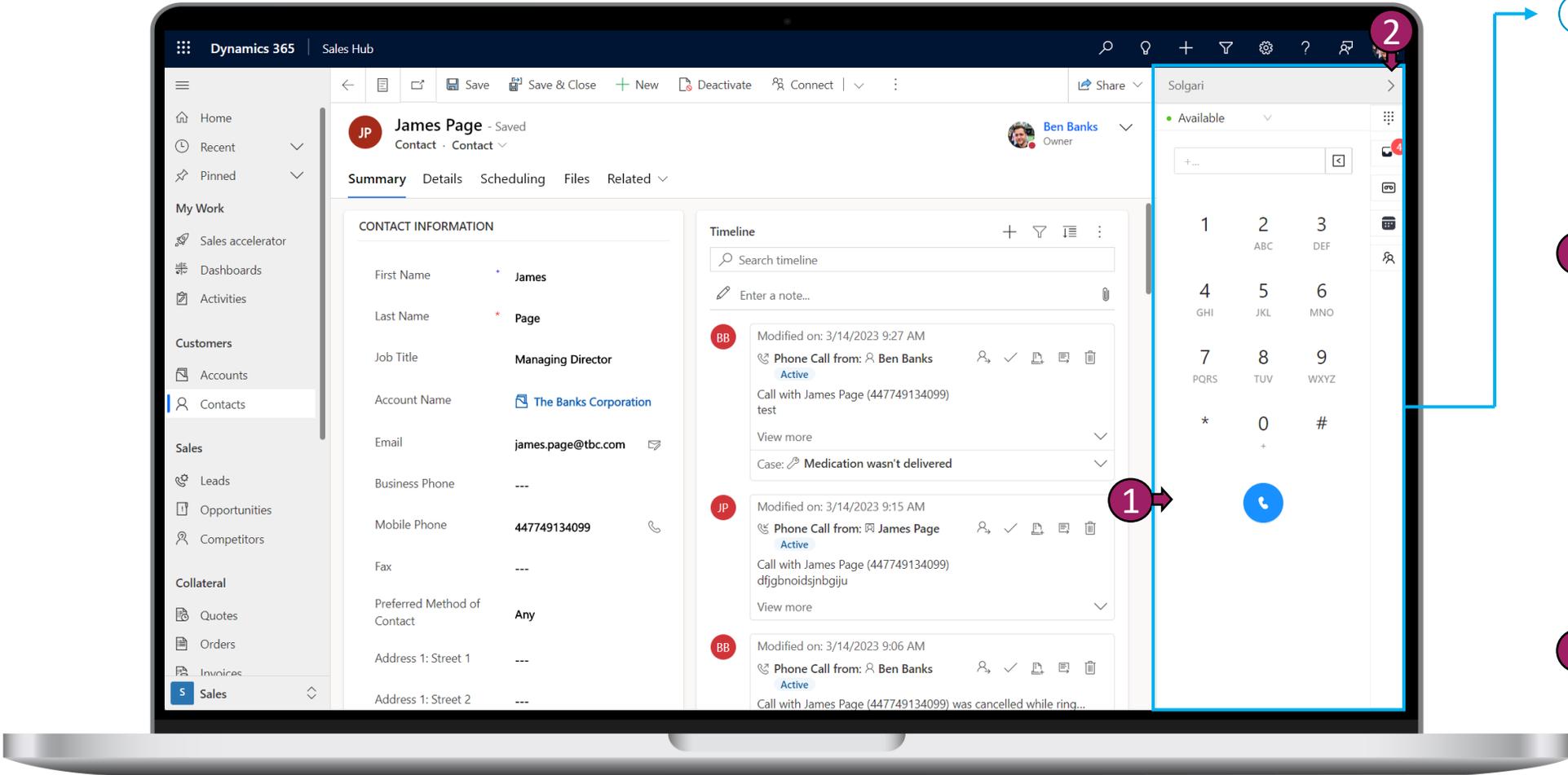
- Activity & Call Recording Playback
- Recent Activities
- Activity Details
- Agent Name
- Call Recording Playback
- Previous Notes
- Add a Note
- Save Notes

# Solgari

Overview Section



Microsoft  
Dynamics 365



**i** Microsoft Channel Integration Framework 1.0

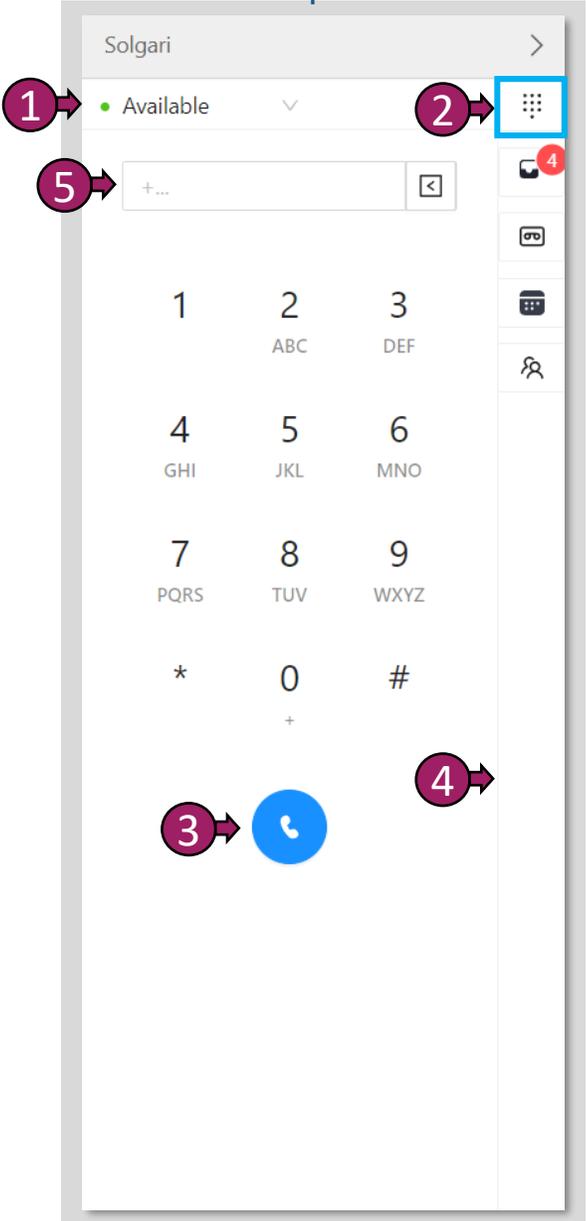
Solgari for D365 is integrated with D365. If you would like Solgari to be added as shown in the image, please contact your D365 administrator.

**1** Solgari for D365  
Solgari for D365 is an all-channel communication tool that works seamlessly with all D365 CE modules. With this tool, you can make and receive voice calls, respond to text messages, and interact with business messages from Facebook or WhatsApp. Additionally, you can log notes and interactions directly into D365.

**2** Expand or Minimise Side Bar  
Solgari for D365 can be expanded to display the user interface as shown in the image to your left. Alternatively, it can be minimised when not in use.

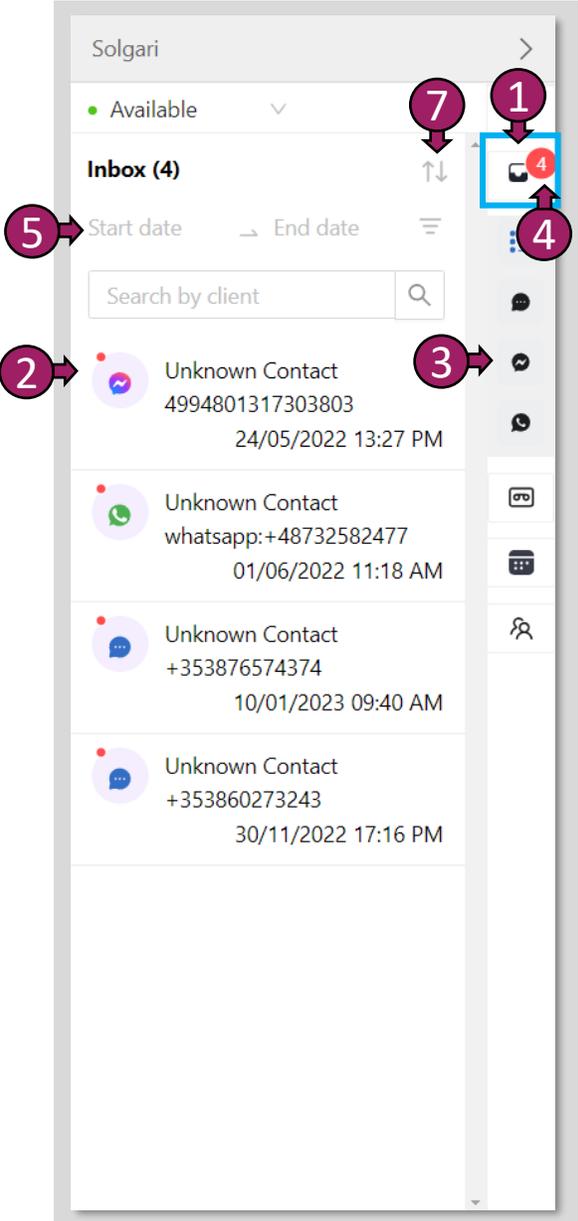
# Overview

## Dial pad



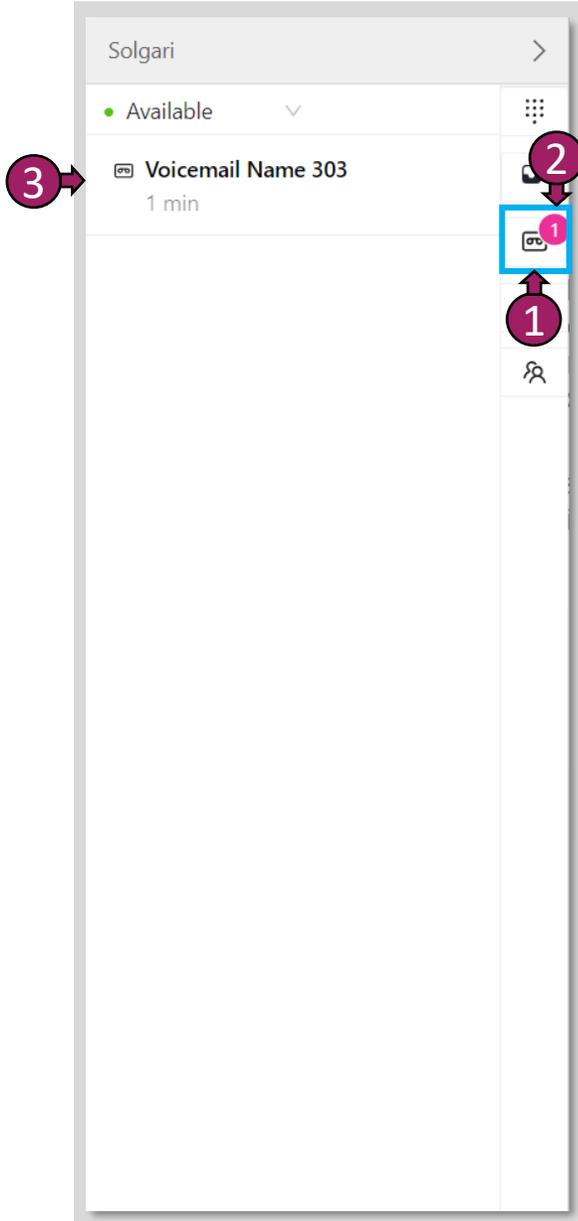
- 1 **Status** - This is where you select your availability status, such as "Busy," "Available," or "Unavailable." When you make or receive a call or message, your status will automatically update to "Busy" or "On a Call."
- 2 **Dial Pad** - You can use your mouse to select the number you wish to dial, or you can use the numpad on your keyboard to enter the number directly.
- 3 **Dial Button** - After entering the phone number, click the dial button or press the Enter key on your keyboard to initiate an outbound call.
- 4 **Sidebar** - This area allows you to select options for the Dial Pad, Call History, or Contact Records.
- 5 **Enter Number** - Input the phone number you want to call in this field.

## Inbox



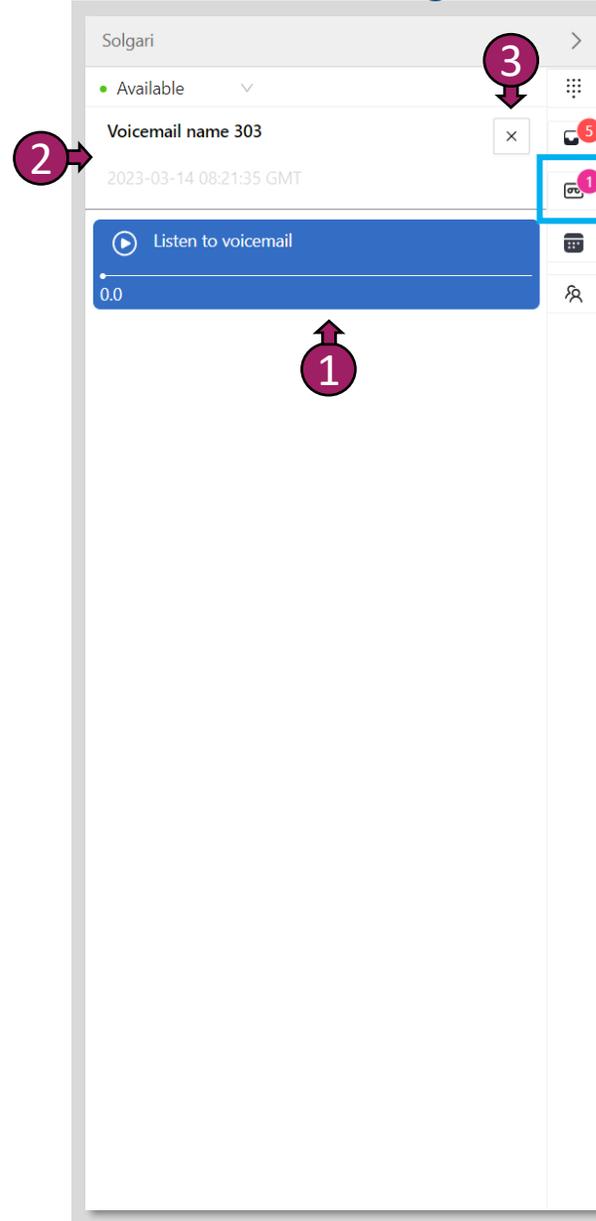
- 1 **Inbox** - Inbox is where all messaging communication from Social Channels and SMS can be found and responded to.
- 2 **Message in the inbox** – Select the message in the inbox that you would like to respond to.
- 3 **Filter by channel** – You can filter the inbox if you have for example multiple 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 **Sort by Newest or Oldest Message** – You can sort all message in the inbox “Most recent first or Oldest First)

### Voicemail Inbox



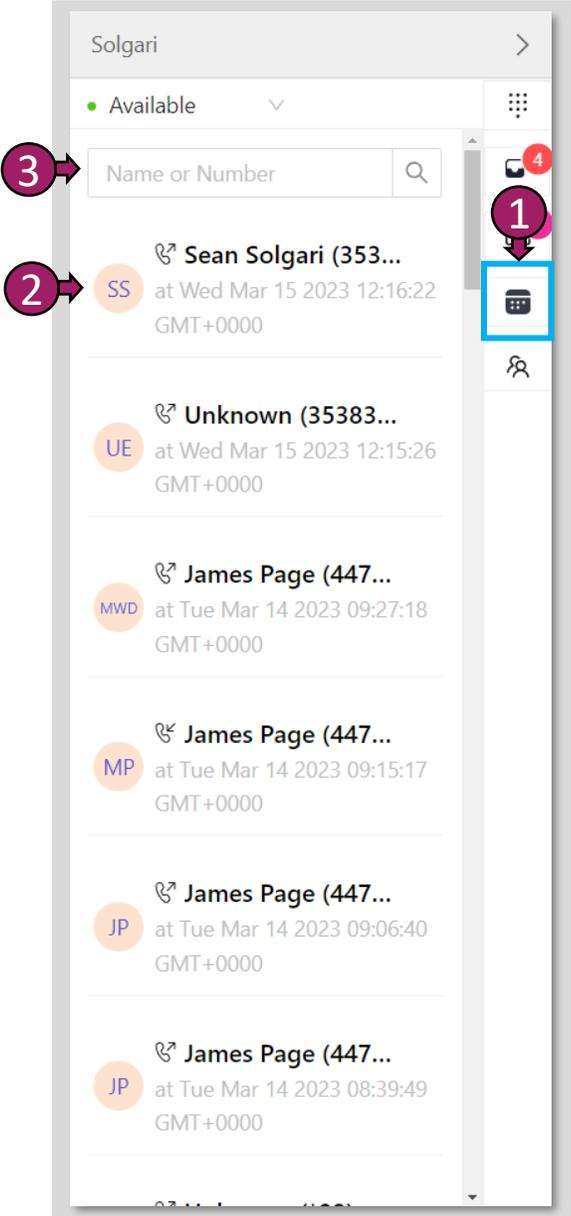
- 1 Voicemail Inbox**  
here you can access all voicemails that have been left on your extension.
- 2 Voicemail Notifications**  
You will see notifications and number of voicemails here.
- 3 Voicemail Message**  
Once you have selected "Voicemail Inbox" you will then be able to select and open a specific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

### Voicemail Message



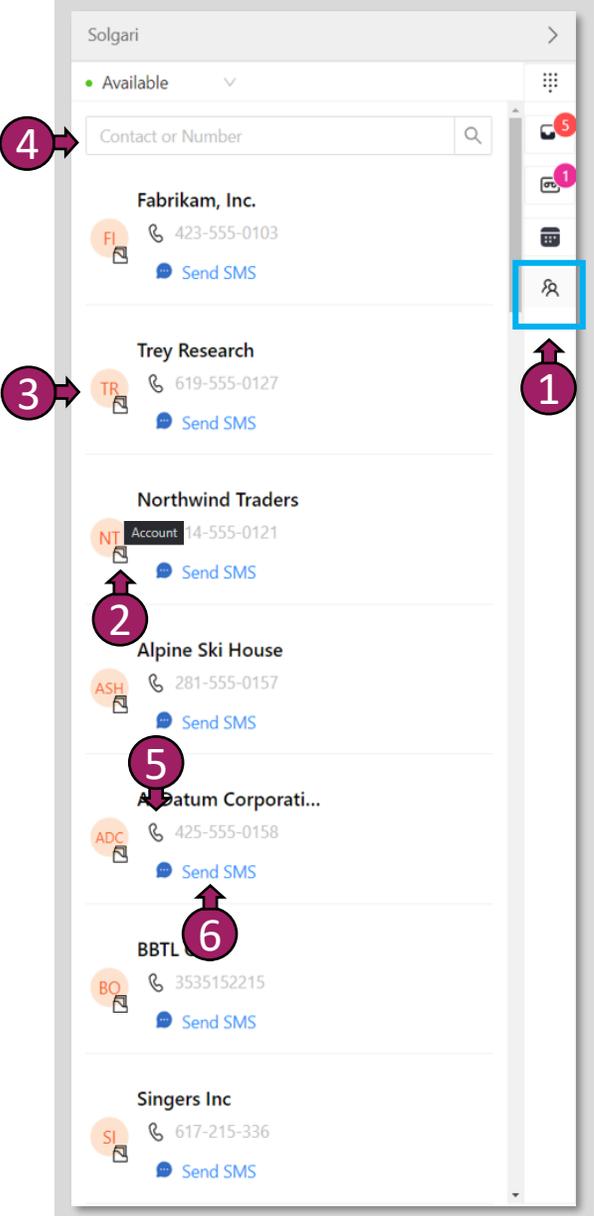
- 1 Play Voicemail**  
Press the play icon to listen to your voicemail message.
- 2 Voicemail Message Detail**  
This is where you can see details about your voice. You will be able to see the date and time of when the voicemail was left.
- 3 Close Voicemail Message**  
Select the cross icon to close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

### Recent Channel Activities



- 1 Recent Channel Activities**  
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.

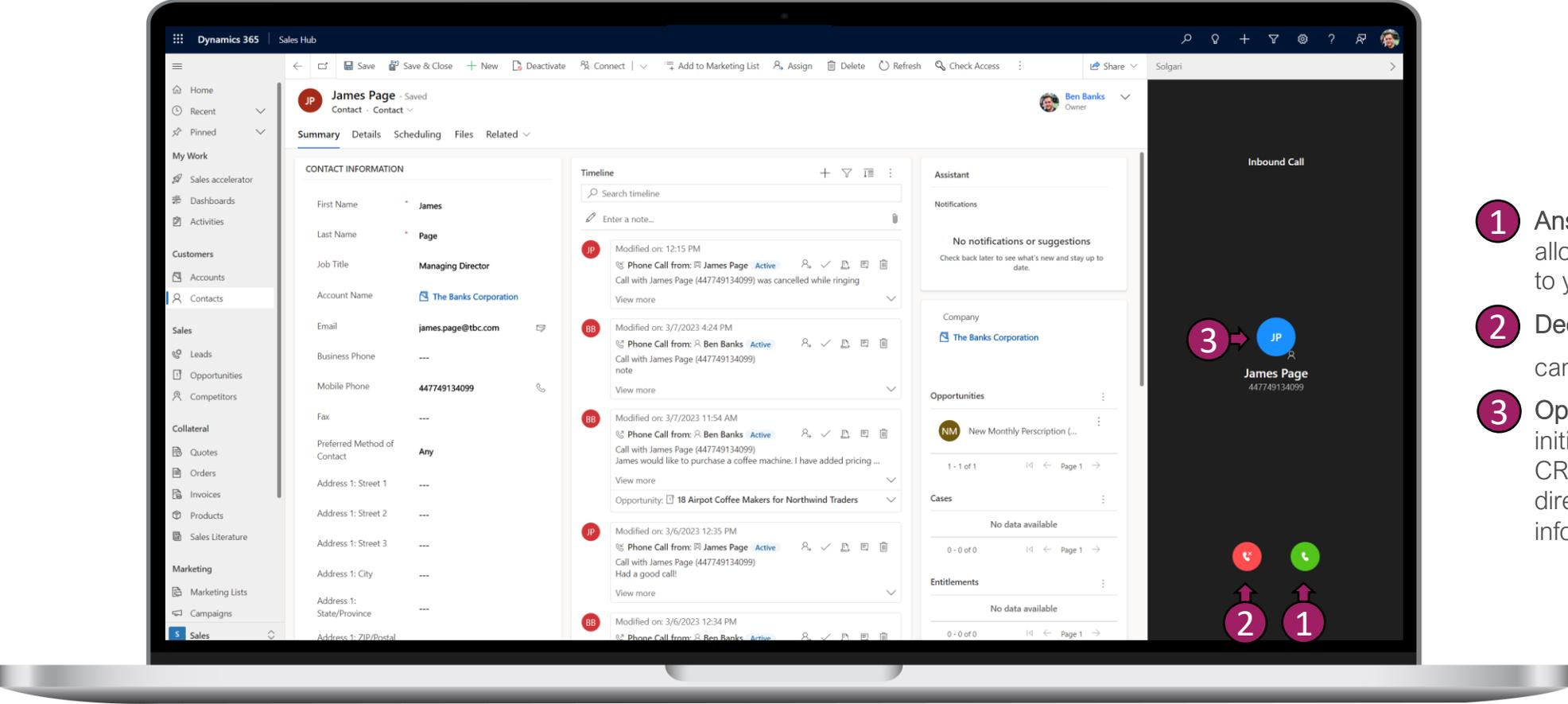
# Solgari

Call Activities Section



Microsoft  
Dynamics 365

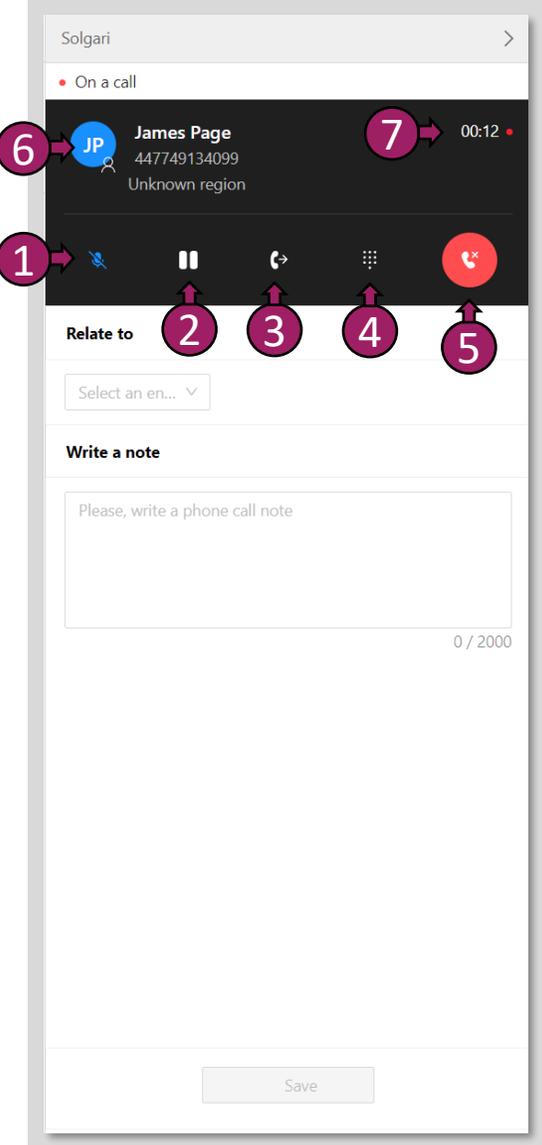
# How to answer a call



- 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. This gives you direct access to the stored contact information for the caller.

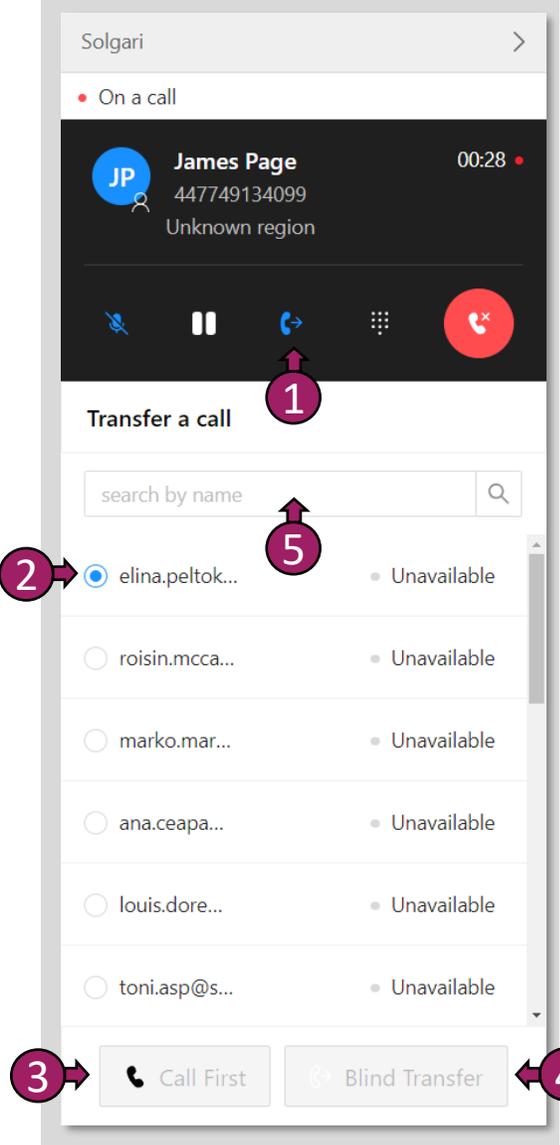
# Call Control

## 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.

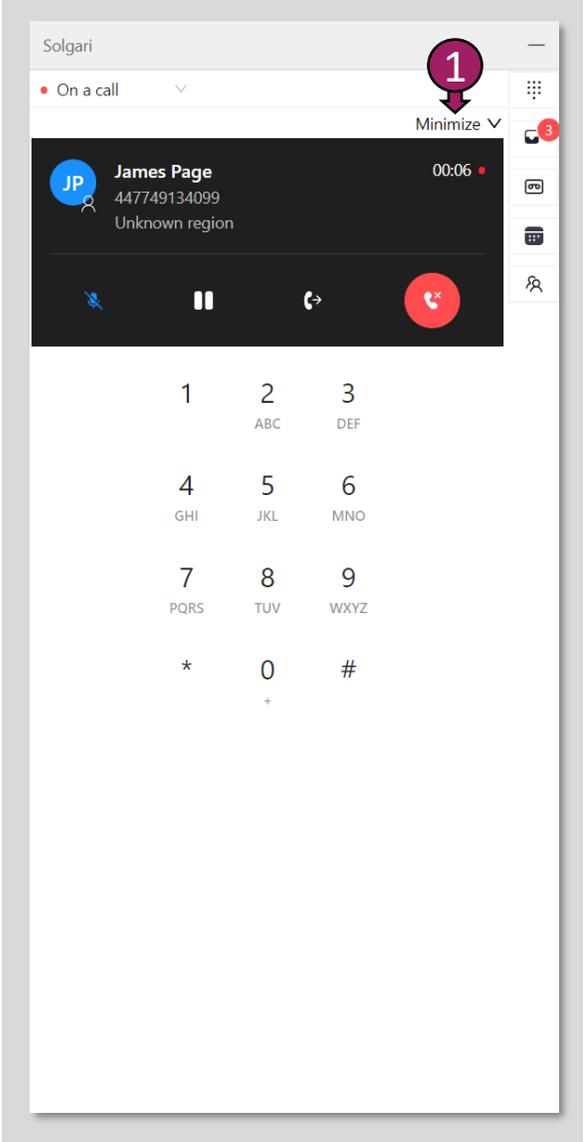
## Transfer a call



- 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.

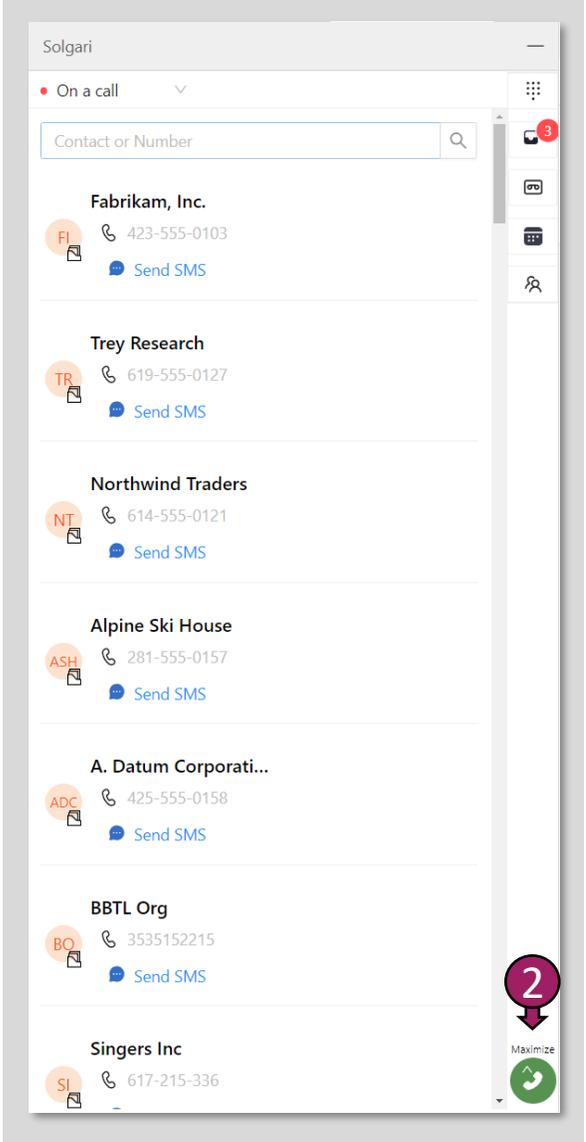
# Minimize & Maximize Call Control

## Minimise



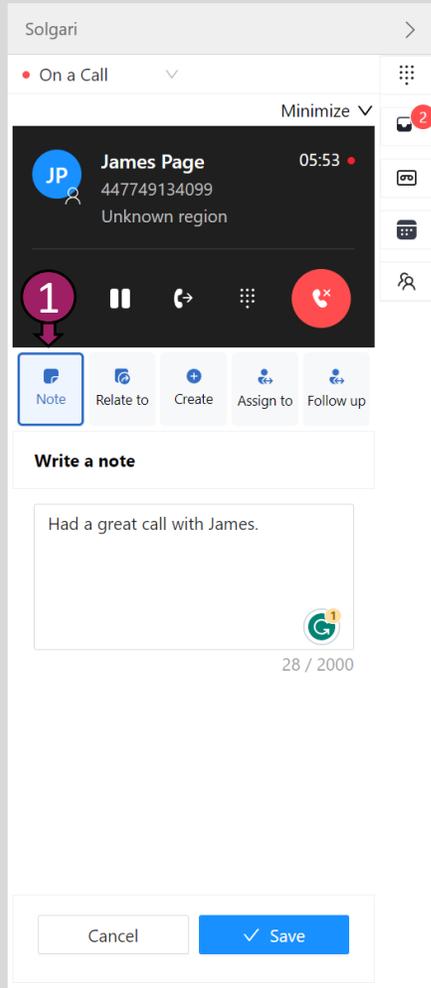
**1** **Minimise**  
Select minimise while on a live call. This gives you the ability to navigate around the Solgari UI i.e., History or CRM Records.

## Maximise

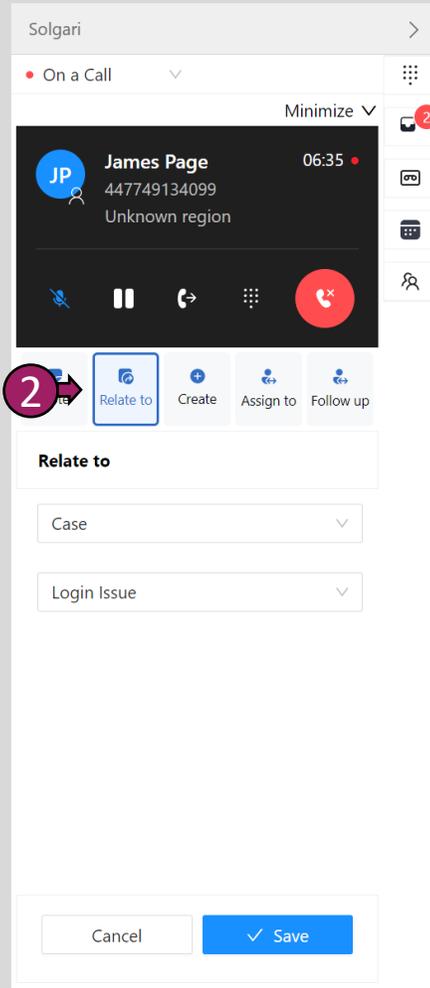


**2** **Maximise**  
Select the green phone icon to go back to your live call session and call control.

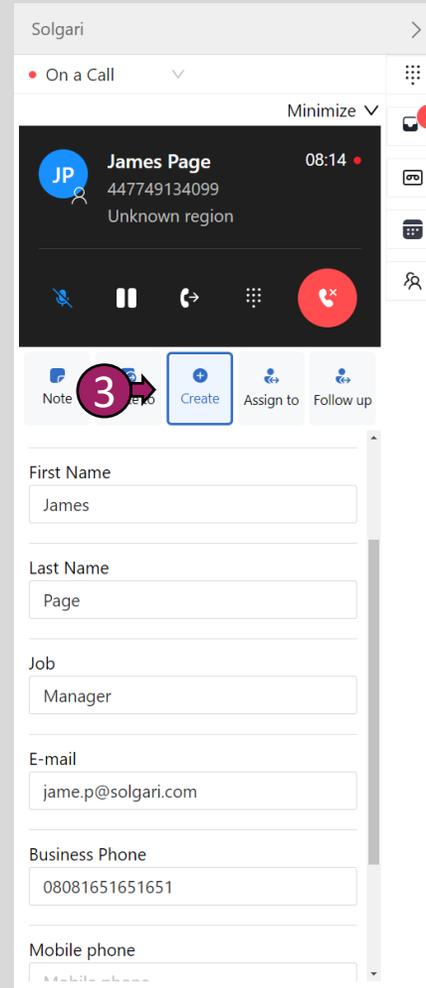
# In-call activity options



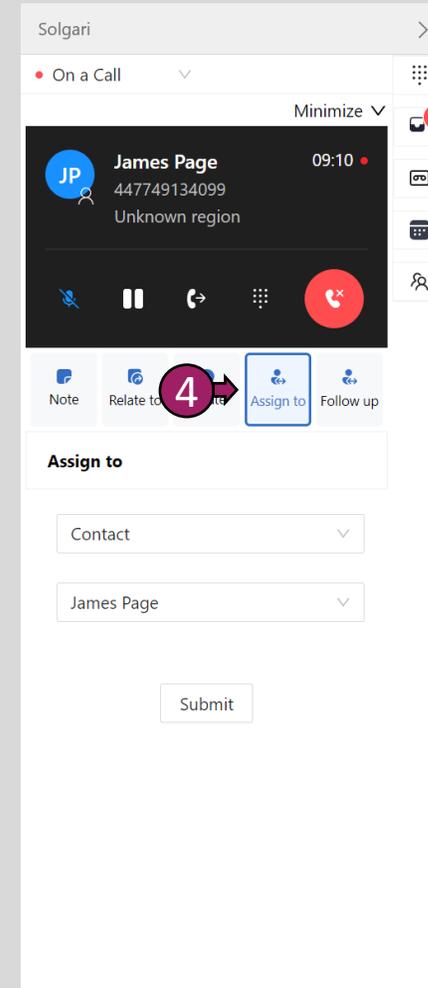
**1** Notes  
Add a note while on a call.



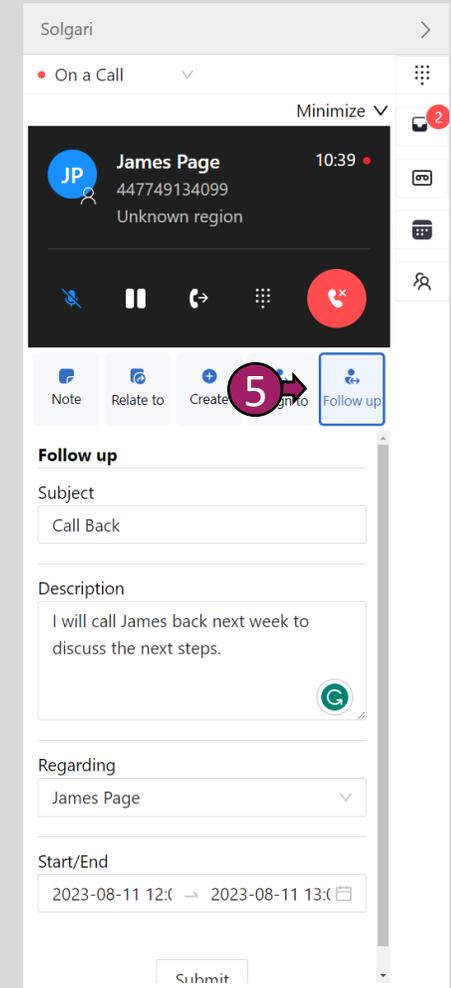
**2** Relate to  
Relate your note and activity to any entity in Dynamics 365 i.e., case or opportunity.



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



**4** Assign To  
Assign an activity or information to an existing record.



**5** Follow-up Task  
Schedule a next call to action and add it to your D365 calendar and reminders.

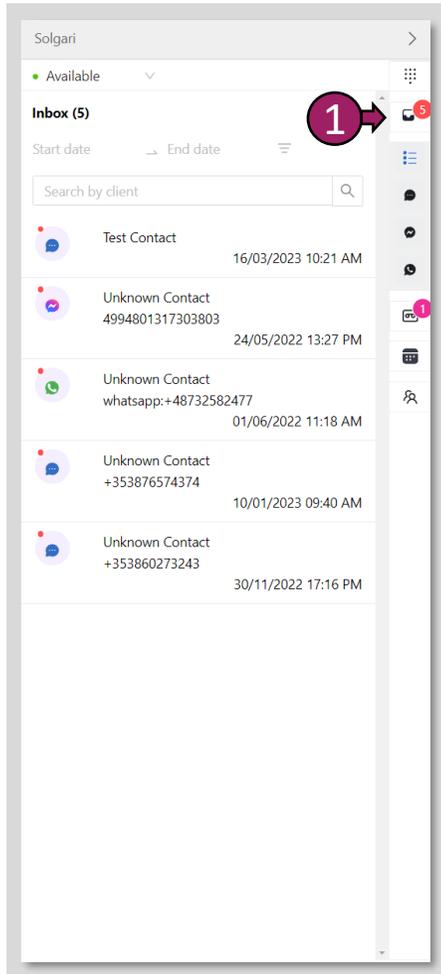
# Solgari

Message Activities Section



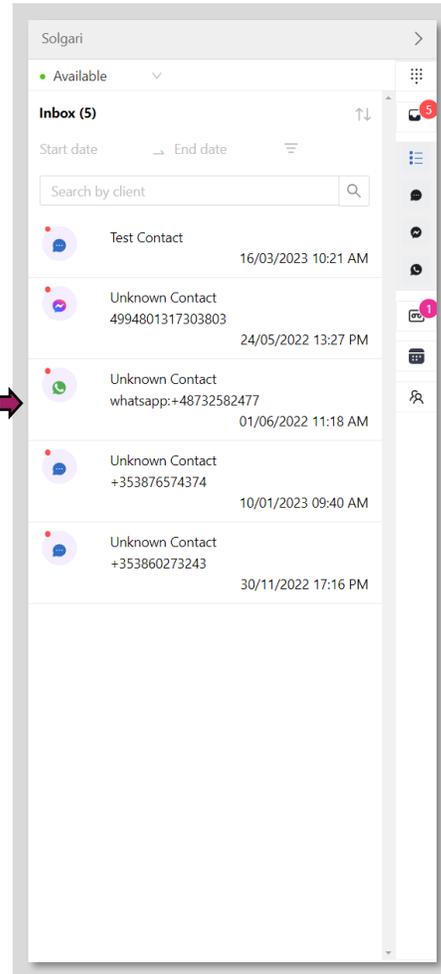
Microsoft  
Dynamics 365

# Respond to a messages



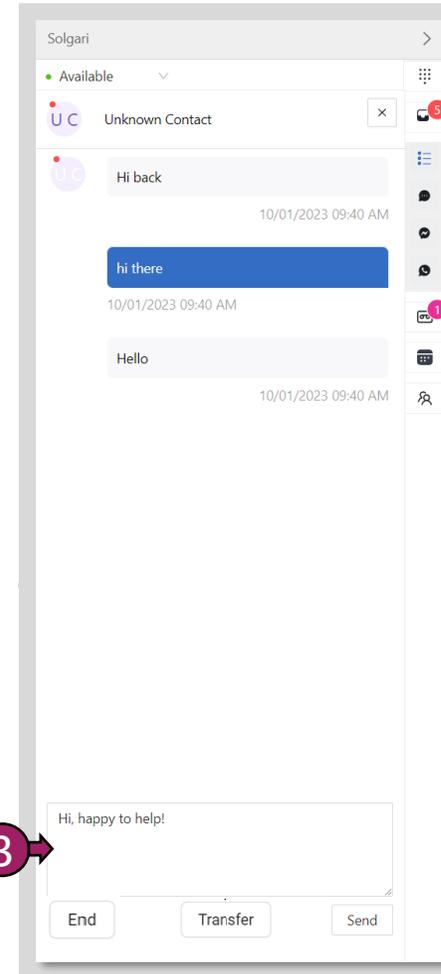
## 1 Open Inbox

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



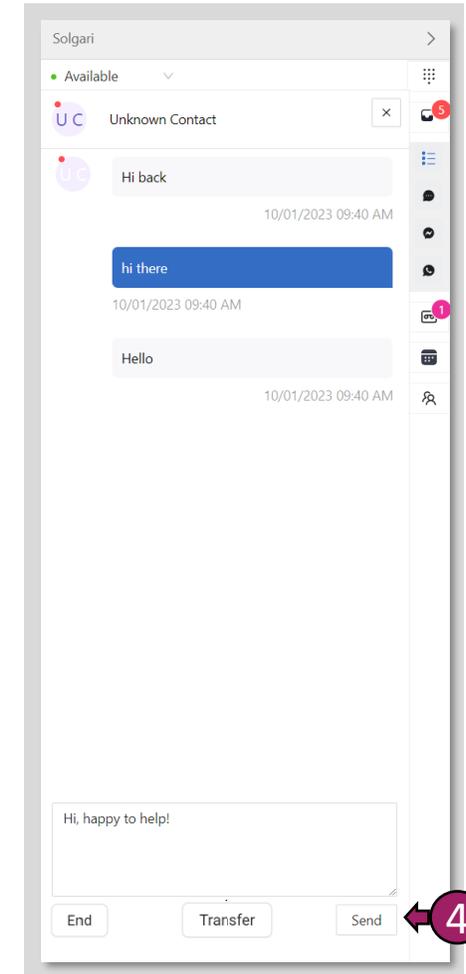
## 2 Select message

Select the message you would like to respond to.



## 3 Type your response

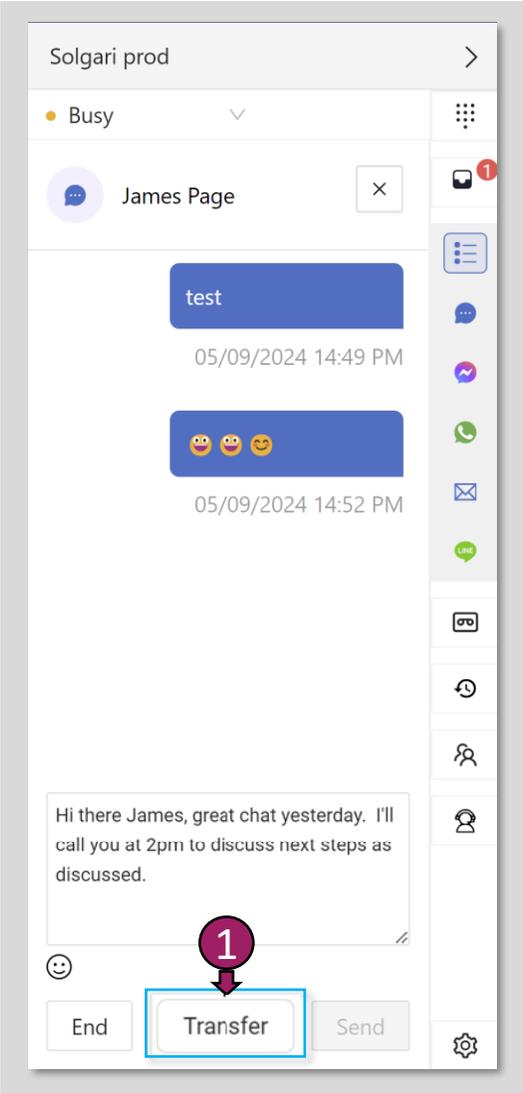
Enter the text you would like to send.



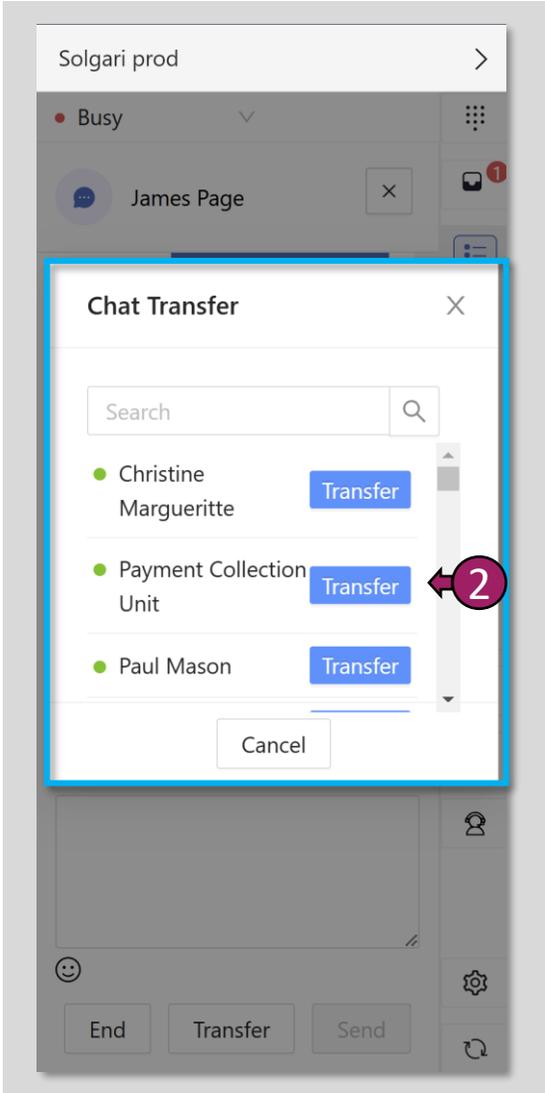
## 4 Send message

Click "send" to reply to the message.

# Message Blind Transfer



**1** Start a Transfer  
Select the transfer button to show an option of agents that you can choose from to blind transfer to entire message to another colleague.



**2** Select Agent & Blind transfer Message  
Select the transfer button to show an option of agents that you can choose from to blind transfer the entire message to.

# Solgari



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Dynamics 365

Outbound Progressive Dialler

# Outbound Dialler - Creating a Campaign

**1** Campaigns  
Select the Campaign Section.

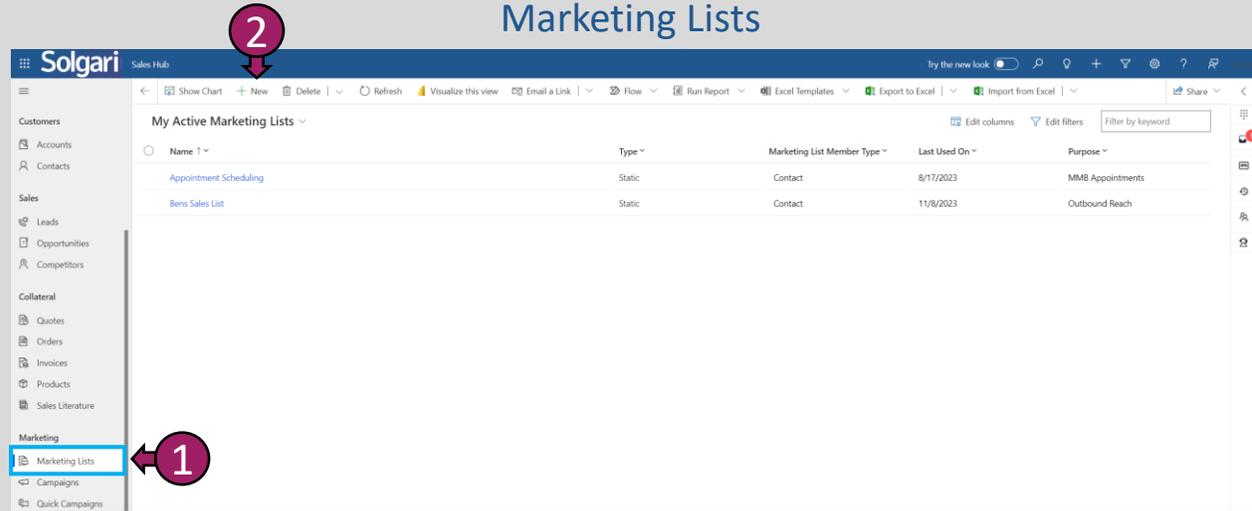
**2** New Campaign  
Select the New button to create a new campaign.

**3** Campaign Details  
Give your campaign a name.

**4** Save Campaign  
Save your new campaign.

# Outbound Dialler – Creating a Marketing List

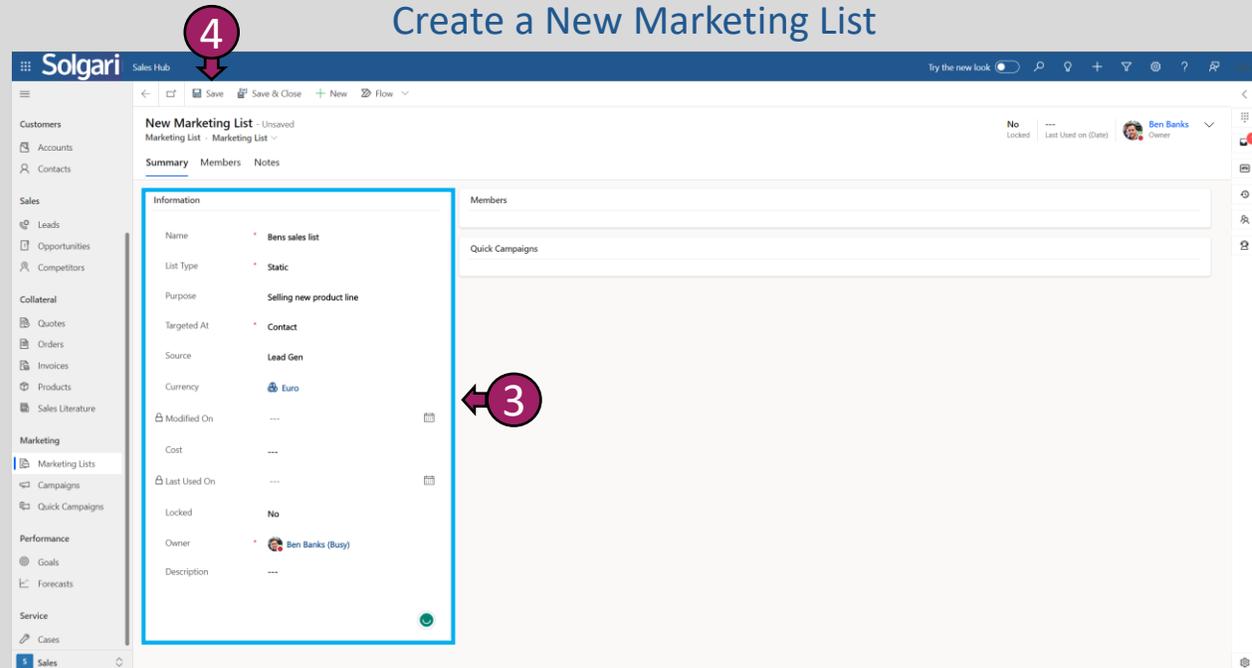
## Marketing Lists



1 Marketing List  
Select the Marketing List section.

2 Create a New Marketing List  
Select new to create a new marketing list.

## Create a New Marketing List

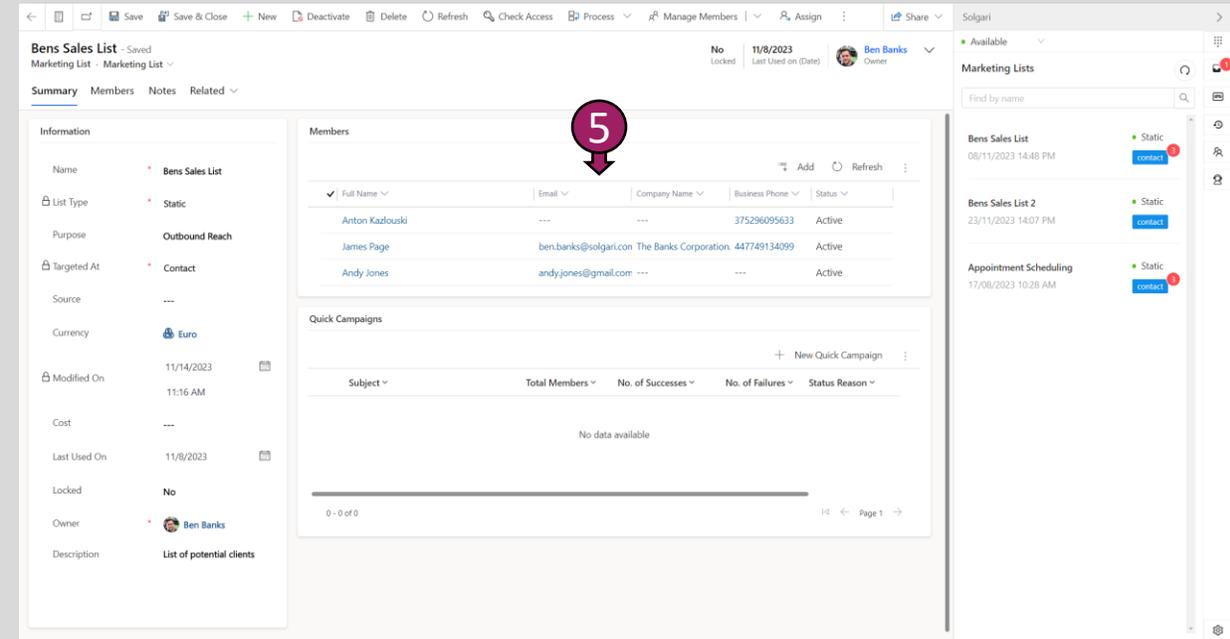
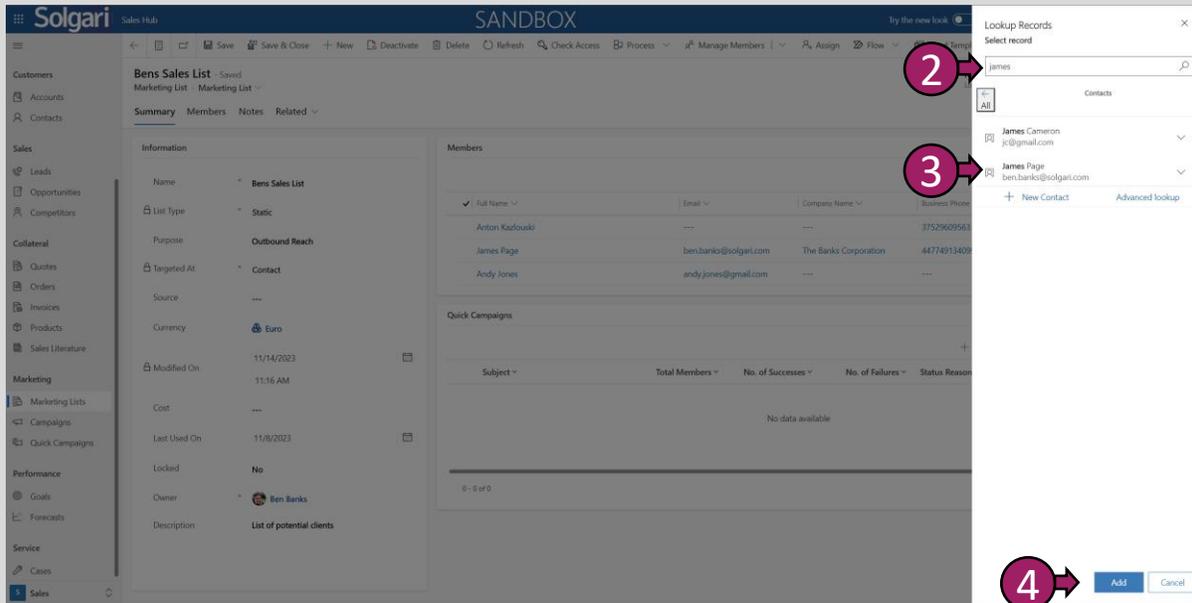
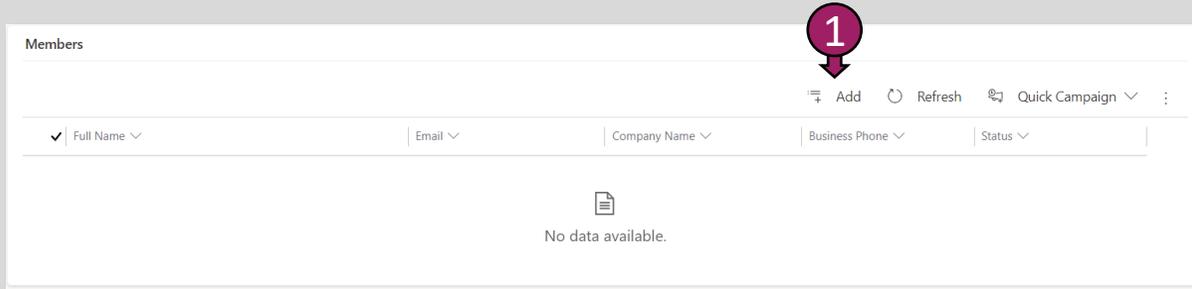


3 Marketing List Name  
Give your marketing list a name and purpose.

4 Save the New Marketing List  
Save your new marketing list.

# Outbound Dialler – Adding Members to a Marketing List

## Adding CRM Records to your dialler list



### 1 Add Members

Select the add button to start adding members.

### 2 Search Members

Search Accounts, Contacts and leads to add to the list.

### 3 Select Records

Select record to add to list.

### 4 Add a Record

Select the add button to assign the record to the list.

### 5 Added Records

You will now see available records in your list.

# Outbound Dialler – Assign a Marketing List to a Campaign

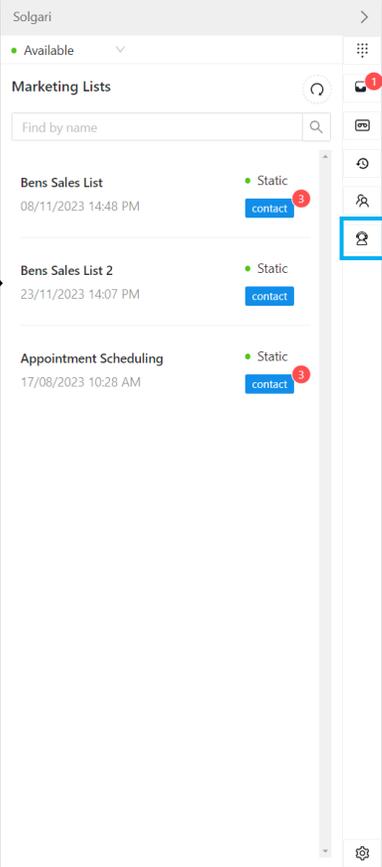
## Add your marketing list to a campaign

The screenshot shows the Solgari Sales Hub interface for a campaign named "Bens Sales Campaign - New Products". The interface is divided into several sections: CAMPAIGN, Timeline, MARKETING LISTS, and LEADS. A red box highlights the "Campaigns" link in the left-hand navigation menu (Step 1). A red circle with the number 2 points to the "Marketing Lists" section header in the main content area. A red circle with the number 3 points to the "Add Existing Marketing List" option in a dropdown menu that appears over the "MARKETING LISTS" section. A red circle with the number 4 points to the search bar in the "Lookup Records" dialog box. A red circle with the number 5 points to the "Bens Sales List 2 Static" option in the "Marketing Lists" list within the dialog. A red circle with the number 6 points to the "Add" button at the bottom of the dialog box.

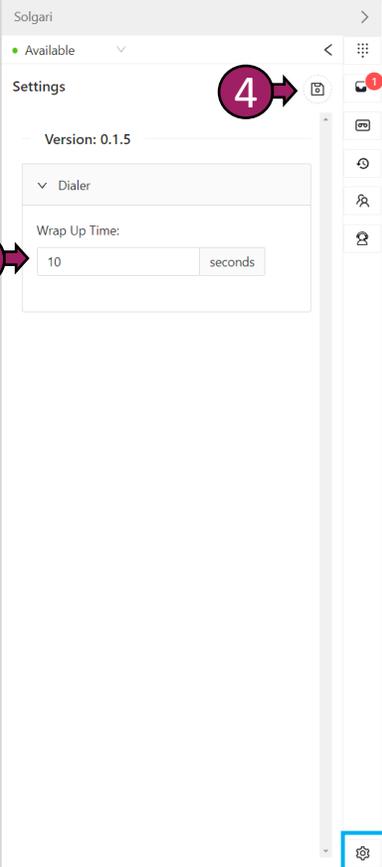
- 1 **Campaigns**  
 Go back to campaigns and select one to open.
- 2 **Marketing List Settings**  
 Select marketing list settings.
- 3 **Add Existing Marketing List**  
 Select "Add Existing Marketing List".
- 4 **Search Marketing lists**  
 Type the name of your list.
- 5 **Assign Lists**  
 Select list that you would like to add.
- 6 **Add Marketing List**  
 Select add to assign your lists to the campaign.

# Outbound Dialler – Preparing to dial

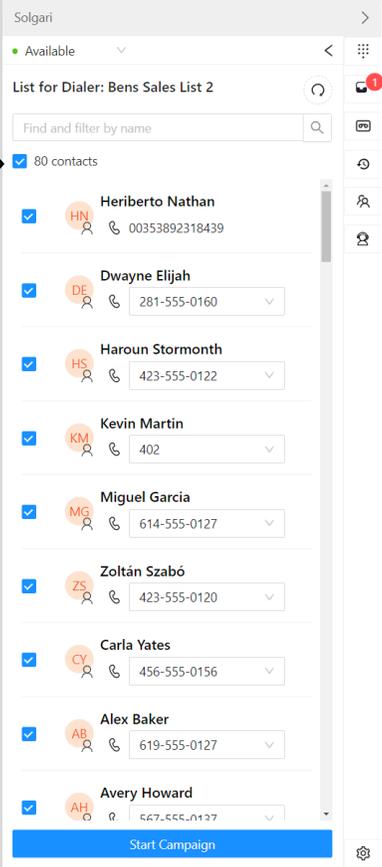
## Marketing Lists



## Wrap-up Time



## Contacts



**1** Select Marketing List

Choose the list you want to call.

**2** Select Settings

Go to settings to set time between dials.

**3** Wrap-Up time Settings

Set the time between dials here.

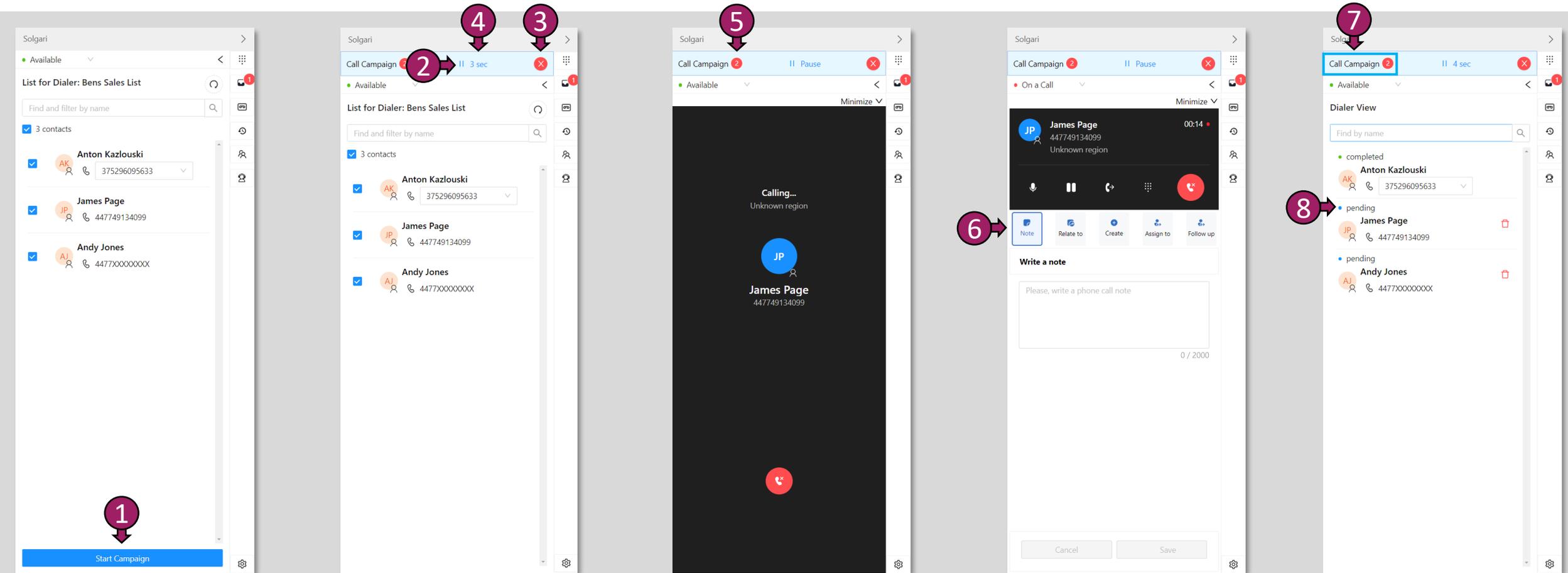
**4** Save Changes

Select Save to set wrap-up time.

**5** Number of Contacts

See the number of contacts that will be dialled. You can also de-select contacts to prevent dialling them.

# Outbound Dialler – Start Campaign



- 1
**Start Campaign**  
 Select "Start Campaign" to begin dialling.
- 2
**Pause & Resume Campaign**  
 Select Pause button to pause or resume campaign.
- 3
**Cancel Campaign**  
 Select cancel button to stop campaign & reset.
- 4
**Wrap-up Time**  
 You will see how much time you have here before then next record is dialled.
- 5
**Remaining Records**  
 See the number of records left to dial. This will count down as you go down the list.
- 6
**Create an activity**  
 You can input notes and relate-to CRM entities when calls connect.
- 7
**Check Campaign**  
 Select to see the progress you're making and last record you were on.
- 8
**Member Status**  
 See who's been called and what's left to be dialled.

# Outbound Dialler – Activity Reports

| Call To           | Phone Num...  | Subject                                      | Regarding       | Priority | Call Type | Duration Formatted |
|-------------------|---------------|--|-----------------|----------|-----------|--------------------|
| JP James Page     | 447749134099  | Call with James Page (447749134099)          | James Page      | Normal   | Dialer    | 00:20              |
| AK Anton Kazlousk | 375296095633  | Call with Anton Kazlouski (375296095633) ... | Anton Kazlouski | Normal   | Dialer    | 00:00              |
| JP James Page     | 447749134099  | Call with James Page (447749134099)          | James Page      | Normal   | Dialer    | 00:00              |
| JP James Page     | 447749134099  | Call with James Page (447749134099)          | James Page      | Normal   | Dialer    | 00:39              |
| AJ Andy Jones     | 4477XXXXXX... | Call with Andy Jones (4477XXXXXXX) was ...   | Andy Jones      | Normal   | Dialer    | 00:00              |
| AK Anton Kazlousk | 375296095633  | Call with Anton Kazlouski (375296095633) ... | Anton Kazlouski | Normal   | Dialer    | 00:00              |
| AK Anton Kazlousk | 375296095633  | Call with Anton Kazlouski (375296095633) ... | Anton Kazlouski | Normal   | Dialer    | 00:00              |
| JP James Page     | 447749134099  | Call with James Page (447749134099) was c... | James Page      | Normal   | Dialer    | 00:00              |
| AK Anton Kazlousk | 375296095633  | Call with Anton Kazlouski (375296095633) ... | Anton Kazlouski | Normal   | Dialer    | 00:00              |
| JP James Page     | 447749134099  | Call with James Page (447749134099)          | James Page      | Normal   | Dialer    | 00:43              |
| AK Anton Kazlousk | 375296095633  | Call with Anton Kazlouski (375296095633) ... | Anton Kazlouski | Normal   | Dialer    | 00:00              |
| JP James Page     | 447749134099  | Call with James Page (447749134099)          | James Page      | Normal   | Dialer    | 00:06              |
| AJ Andy Jones     | 4477XXXXXX... | Call with Andy Jones (4477XXXXXXX) was ...   | Andy Jones      | Normal   | Dialer    | 00:00              |

## 1 Select “My Phone Calls”

Choose my phone calls first to configure your report to show dialler calls verse regular calls.

## 2 Edit Columns

Select “Edit Columns” and search for “Call type”. Once found, select this field to add to report.

## 3 Add Duration Formatted

Select “Edit Columns” and search for “Duration Formatted”. Once found, select this field to add to report.

Examples of reporting using the Solgari outbound dialler within Dynamics.

You can run regular and dialler activity reports against your whole team and individuals can look at their own KPI reports within Dynamics 365.

# Solgari



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Additional Features Section

# Solgari Copilot – Conversation Summary & Sentiment

## Solgari Copilot for Dynamics 365

**Call with James Page (44XXXXXXXXXX)** - Saved

Phone Call - Phone Call

Normal Priority, Open Status, Ben Black Owner

Subject: Call with James Page (44XXXXXXXXXX)

Call From: Ben Black (Busy)

Call To: James Page

Phone Number: +44XXXXXXXXXX, Direction: Outgoing

**Description**

Made a quick call to James to explain to him how Solgari's live transcript can not show visually the conversation between myself and the customer. We played around with this feature testing it out and James was very impressed. Not only could he see what he was saying but also see his overall tone of voice and sentiment from the entire call. Along with this, James could also listen back to the conversation with the playback call recording option that Solgari offers in D365.

Regarding: James Page

Call Type: Regular

Duration: 1 minute

Duration Formatted: 00:47

Duration milliseconds: 47,000

**Solgari Copilot**

**Transcript**

Now you can see that's a live call, everyone, I'm on a live call and there's an option down here now, a new option called Transcript. If I just open that option up, you should then be able to see in a couple seconds any kind of voice transcriptions coming through or activity. And as you can see, it's actually capturing a lot of my what I've just sent out. I've explained it to all that the test, test, test. There you go. OK, so so it's actually. Time period. Like so. Hang up. Bye, bye.

**Summary**

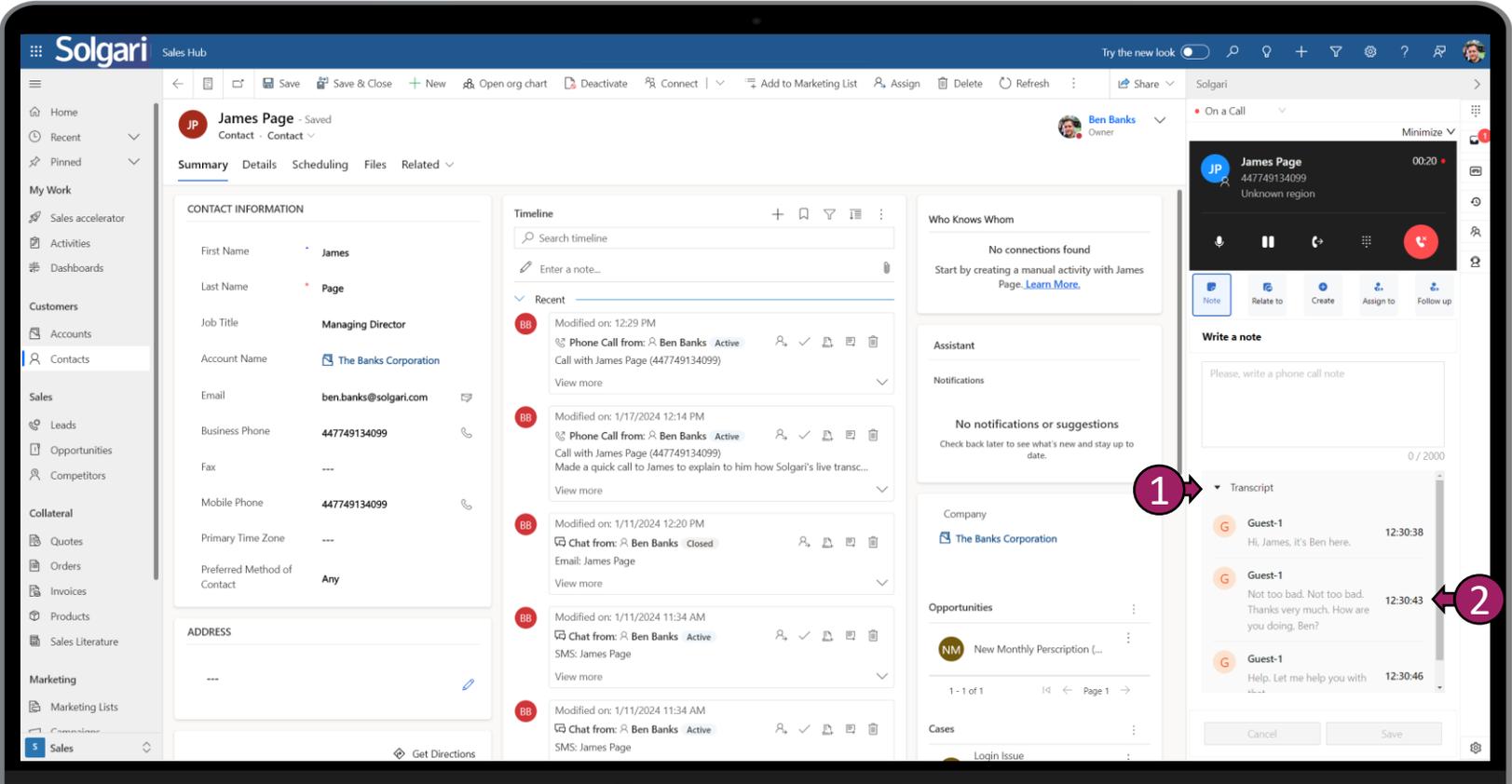
The speaker is on a live call and introduces a new option called Transcript. This option allows users to view any voice transcriptions or activity that may come through. The speaker notes that the system is already capturing a lot of the information they've sent out. The speaker also mentions that they have tested this feature. The conversation ends with the speaker hanging up and stating that there is a time period for the call.

**Sentiment Grading**

|           |            |         |
|-----------|------------|---------|
| 😊 (Green) | 😐 (Yellow) | 😡 (Red) |
| 0.75      | 0.20       | 0.05    |

- 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 Copilot – Live Voice Transcription



**1** Real-time voice transcription

We give agents the ability to record calls and see the live transcription of their voice conversation with the customer in real-time.

**2** Time stamp

The agent will see a time between each sentence between themselves and the customer while on the call to make sure they are being efficient.

# 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 who 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.

The screenshot displays the Dynamics 365 interface for a call activity. The main content area shows details for a call with James Page (447749134099). The call was made by James Page to Ben Banks. The duration is 1 minute. A note is present: "Had a good call!". The interface includes a sidebar with navigation options like Home, Recent, Pinned, My Work, Customers, Sales, and Collateral. A Solgari sidebar is also visible on the right, showing a list of activities and a call recording playback player. The playback player shows the agent name Ben Banks and a "Listen to recording" button. A "Write a note" section is also visible, with a "Save" button at the bottom.

# Solgari

Please contact support for further details

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